

**RED
CARD**

RED CARD 2025

ASIA
DIGITAL PERFORMANCE
INDEX



FOREWORD

Welcome to the 14th edition of the Red Card: Asia Digital Performance Index – your ultimate guide to the digital pulse of European football in China and across Asia. This year’s report delves into the platforms, trends, and strategies shaping the game in one of the world’s most dynamic continents.

2024 was a year electrified by the European Championships in Germany, as China’s football fans stayed up late, glued to screens, and buzzing online. The digital landscape saw seismic shifts: RedNote emerged as a game-changer, with teams and players flocking to launch official accounts, while Douyin scored big with pay-per-view successes, especially during Asia qualifiers featuring the China national team.

David Beckham dazzled fans off the pitch with two high-profile trips, teaming up with giants like Adidas, Sands, and EA. Meanwhile, Migu tightened its grip on media rights, sealing the blockbuster deal for exclusive new media rights to the English Premier League.

While mainland China still awaits live pre-season matches, the opening of Hong Kong’s Kai Tak Stadium and the Premier League’s expanding presence signals exciting times ahead. Outside of China, we look at who the football fans are and where you can find them.

Let’s kick off!

Dominic Lytwyn,
VP, Digital,
Mailman, an IMG Company


















CONTENTS

- 03. Club Winners
- 04. Club Rankings
- 05. Best Activations
- 07. Douyin Spotlight
- 08. Best Offline Activations
- 09. EURO 2024 Spotlight
- 11. Rest of Asia
- 13. 2025 Predictions
- 14. About

CLUB WINNERS



CLUB RANKINGS

		TOTAL POINTS	Weibo Followers	Weibo Growth	Weibo Engagement	Mini Program / App	Douyin Followers	Douyin Growth	Douyin Engagement	Ecommerce	Social Ecommerce	Bilibili Followers	Bilibili Growth	Bilibili Engagement	RedNote Followers	RedNote Growth	RedNote Engagement
1		98	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
2		73	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
3		69	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
4		62	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
5		61	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
6		44	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
7		42	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
7		42	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
7		42	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
10		41	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
10		41	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
12		28	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
13		22	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
14		21	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
15		20	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

*Data collected from January 1st - December 31st, 2024. A full methodology is available on request.

BEST ACTIVATIONS

Collaborations Drive Fan Awareness Outside the Football Fan Circle

Real Madrid & Fan Zhendong

The Olympic gold medalist is a passionate Real Madrid fan, and during Paris 2024, he honored the club with playful tributes to Cristiano Ronaldo, Jude Bellingham, and Kylian Mbappé's iconic celebrations.

Real Madrid invited him to the Santiago Bernabéu in October, creating content around his visit, which went viral on Weibo garnering 1m engagements and 13m views.



Man City & Wu Fang Zhai

City engaged fans during Mid-Autumn Festival through a special collaboration with renowned mooncake brand, Wu Fang Zhai. The limited-edition mooncake set, inspired by the club's nickname "Blue Moon," celebrates the festival's tradition of sharing mooncakes with loved ones.

The club amplified this campaign across all of its official Chinese digital channels through short videos and opportunities to win the mooncakes.



PSG x Jay Chou

PSG joined forces with renowned Chinese singer Jay Chou to release an exclusive Year of the Dragon edition of their Chinese New Year jersey.

PSG also collaborated with a group of KOLs from diverse fields such as fashion, music, lifestyle, and football on RedNote. Each KOL received a custom jersey and co-created engaging content.



Manchester United & Lu Han

Lu Han has over 70m followers on Chinese social media. In March 2024, he returned to Old Trafford after five years and took part in interviews, shook hands with the players and toured around the stadium.

This activation brought over 110m impressions and is considered one of the club's most successful cross-industry online marketing successes.



BEST ACTIVATIONS

New Digital Methods, Platform Trends, and Partnerships to Drive Engagement with Fans

Alphonso Davies Livestream Chat With Fans

Bayern Munich hosted a live video chat with Davies, aiming to strengthen connections with their fanbase. The event featured interactive games and a Q&A session.

Promoted across the club's Chinese social media channels, the initiative offered valuable insights into the preferences of Chinese football fans, highlighting their strong interest in player-led content and real-time interactions.



Credit: Fabrizio Romano X

Tottenham Hotspur's On-Site Fan Reporter

The club partnered with a passionate Chinese fan to produce engaging content around their matchdays. Through two live streams on Bilibili - targeted at Gen Z - they attracted 800% higher views and engagements.

The club also created BTS content to further strengthen their connection with fans, including stadium tours, match-watching vlogs, and fan interviews.



Credit: Tottenham Hotspur Weibo

Juventus' Chinese New Year Campaign

Celebrating the Year of the Dragon, the campaign creatively blended dragon motifs, Dunhuang murals, and Cuju, while transforming the character 尤 (Juventus) into 龙 (Dragon) to symbolise good fortune.

The campaign featured a 4-minute hero video, with 185 pieces of content generating 24m impressions, 19m video views, and 820k engagements.



Credit: Juventus Weibo

DOUYIN SPOTLIGHT

Douyin, one of China's leading social media platforms, boasts over 800m daily active users (DAU) as of 2024, with an average daily usage time of 134 minutes per user.

The Home of Football Content & Live Rights

Sports content thrives on Douyin, with over 120m sports content accounts and 60k verified sports creators (accounts with over 10k followers). Football, in particular, has found a home on the platform, with over 50 football accounts actively engaging fans. In recent years, the platform's media rights strategy shifted to pay-per-view (PPV) revenue-sharing models over traditional upfront fees.

Content Strategy for Success

How football accounts can succeed on Douyin is changing. In previous years, on-pitch highlights of amazing moments, posted consistently was the recipe for success. In 2024, we saw this change in several ways. Firstly, content showing original, novelty-driven content, such as showcasing young talents or grassroots tournaments, grew in relevance.

Secondly, driving emotional resonance through music, special effects, and cinematic techniques was also key. Thirdly, long-term, opinion-driven content and timely reactions to major events also strengthen fan loyalty. Live-streamed e-commerce formats, like mystery box reveals, further enhanced engagement.



Pay-Per-View Model

Douyin's PPV model is disrupting live sports broadcasting. This strategy has been most successful for one-off events that sit outside of existing broadcast deals, such as high-profile football friendlies. The live content can be previewed for 3 minutes for free on users' feeds, after which a paywall is activated. Prices are set by rights holders and a typical 70-30 revenue split with the platform. From 2022 to 2024, the platform streamed over 15,000 events, generating 2.7bn views. The platform uses algorithm-driven targeting, and microtransactions to cater to China's mobile-first users.

Implications and Future of Sports

Douyin's PPV model is allowing clubs to own fan relationships, and creating an additional revenue pool for rights holders. European football clubs can leverage this model for direct-to-fan monetization, summer friendlies in China, and untapped opportunities like women's leagues and behind-the-scenes content.

Douyin sees a future of hybrid deals combining PPV and sponsorship integrations, positioning the platform as a key player in China's sports media landscape.

NB: All data shared is directly from Douyin.

BEST OFFLINE ACTIVATIONS

Premier League Opens Beijing Office, Partners with Chinese Football Association

The office opening aimed to create more opportunities for fans to connect with the league and its clubs, whilst collaborating with local football authorities to promote the sport. During the office's opening week, the EPL conducted a grassroots coaching course for 35 community coaches, led by coaches from multiple EPL clubs. The league also signed a Memorandum of Understanding with the CFA to support football development at all levels.



Beckham's 24-hour Partner Masterclass with EA Sports and Adidas

The visit aimed to create engaging content, show appreciation for partners, and participate in partner-led activations. Beckham's presence broke the livestream viewership record for a foreign celebrity in China, attracting 5m views. The campaign involved collaborations with two partners: Adidas at Qibao High School and EA Sports. Overall, the initiative attracted an impressive 21m video views, highlighting its widespread impact and engagement.



LaLiga Hope Cup Season 3

The 3rd edition of the LaLiga Hope Cup took place from August 24 to 28 at the Hongta Center in Kunming. The tournament featured 5 La Liga U16 teams and 7 U16 national selections from China. Highlights included 12 participating teams, 26 games played, and a total of 348 participants. The event generated significant social media engagement with 117 posts and achieved 1,063 media impacts, amassing an impressive 39.8m broadcast impressions.



Man Utd "I Love United+Beijing"

The 'I Love United+Beijing' initiative has become pivotal for Manchester United's engagement with Chinese fans. Blending in-person events, watch parties, a legends tour, and sponsor-related activities, showcases an effective model for connecting with their Chinese fanbase. By combining offline with digital, Manchester United fosters a deeper connection with fans, highlighting the importance of adapting to diverse cultural landscapes in football fandom.



EURO 2024 SPOTLIGHT

BEST ONLINE CAMPAIGNS, MOMENTS, STAND-OUT MOMENTS ONLINE

“EURO 2024 was a milestone in engaging with our Chinese fans through social media, with record-breaking interactions and innovative campaigns across live and planned content. The growing support from our Chinese partners like BYD, Hisense, Alipay, AliExpress and Vivo, together with the extensive coverage on iQiyi and CCTV, reflects the strong connection we’ve built locally, and we’re excited to continue fostering this relationship as we grow football together.”

**Guy-Laurent Epstein, 2025
UEFA Marketing Director**

Collaboration with Digital Broadcasters

Migu sublicensed broadcast rights from iQiyi for all EURO 2024 matches. This created a unique opportunity for UEFA EURO 2024 to host a series of KOL-led livestreams during the tournament. UEFA gained a dedicated audience, while Migu tapped into UEFA’s extensive social media following, drawing viewers to their platform.



Diverse Content Across All UEFA Channels

Throughout the tournament, UEFA shared over 3,000 posts on their China platforms. These included collaborations with KOLs, live streams from the stadium, virtual chat rooms on Douyin, 24/7 match updates, custom graphics and creatives, and strong calls to action on Weibo.



Reach & Growth

By the end of the tournament, UEFA had gained a total of 1m new followers, 1b impressions, and 7m engagements across Weibo, Douyin, Migu, and Alipay. The heavyweight partnership with Alipay, in particular, played a significant role, leveraging the massive reach of their super app to amplify UEFA’s presence and engagement.



EURO 2024 SPOTLIGHT 2

China-Related Billboards Dominate Screens

Most of the ads broadcast on TV and OTT platforms were virtual, meaning the same Chinese sponsors were displayed in English on-site, while appearing in Chinese during the live broadcast.

These China-specific virtual real-time ads marked the first use of Virtual Billboard Replacement, which replaces specific ads on LED billboards in stadiums with ones tailored for the target market.



Chinese Brands Target Global Markets

Chinese companies, Alipay+, Hisense, BYD, VIVO, and AliExpress accounted for more than one-third of the 13 top-tier sponsors at EURO2024, making the country the single-biggest source of sponsorship.

This demonstrates the rising technological prowess and competitiveness of Chinese brands on the global stage and their commitment to expanding into overseas markets.



Chinese Outbound Tourism Boost to Europe

EURO 2024 attracted a wave of Chinese travelers to Europe. According to travel data, search interest in Germany had tripled since June compared to May.

When it comes to flight bookings, data shows that 52k flights were booked from mainland China to Germany during EURO 2024, marking an increase of 110% compared to the same period last year.



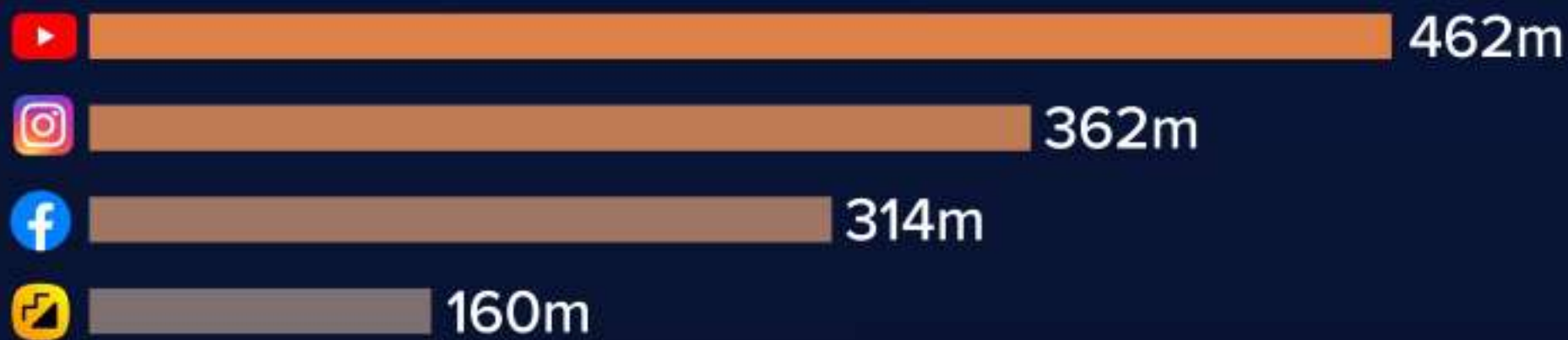
REST OF ASIA - INDIA AND INDONESIA



Snapshot

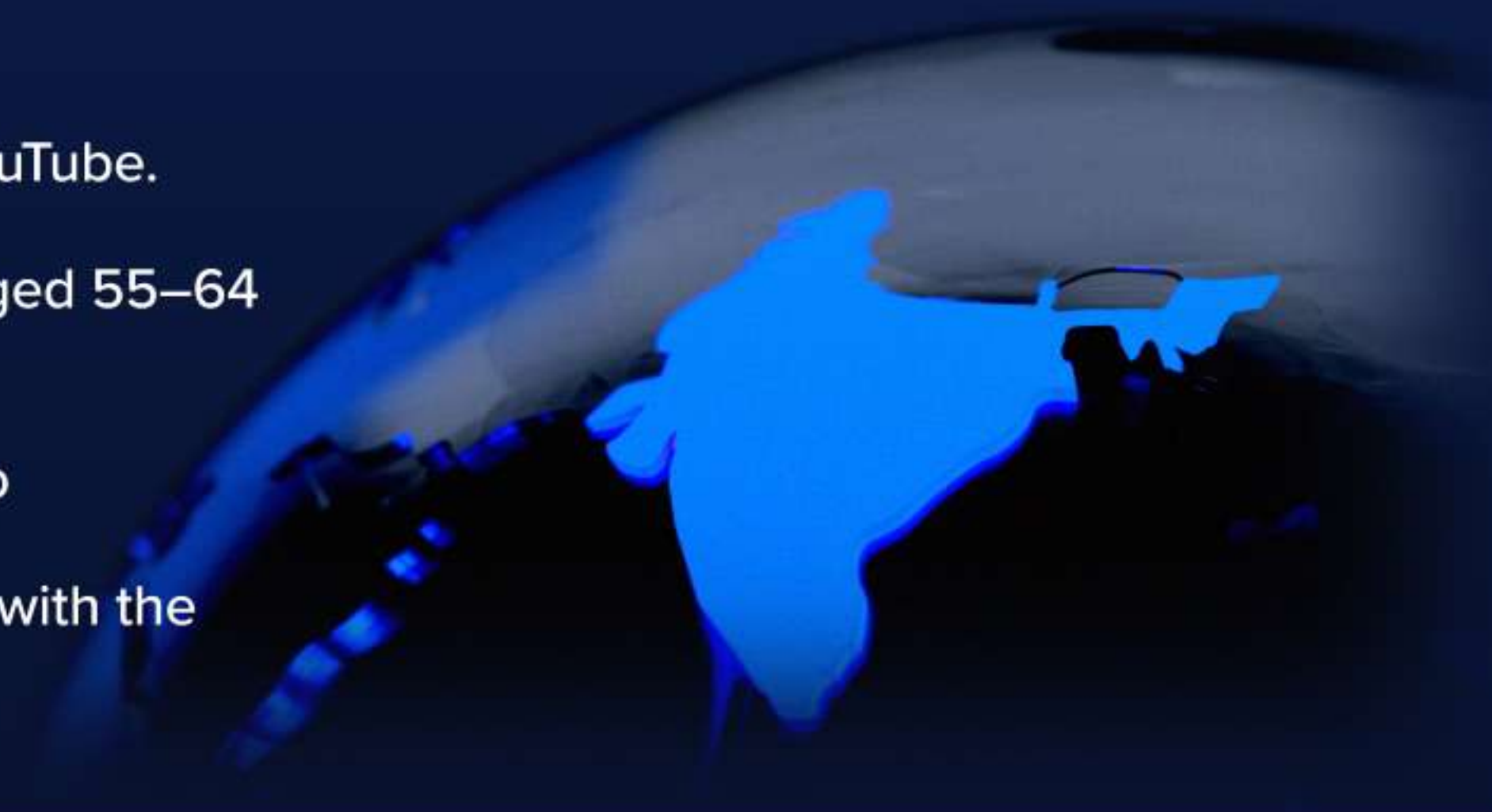
- 750m internet users.
- Football's surging fanbase exceeds 300m.
- Active football participation with 82m engaging in the game.

Social Overview (MAUs)



Need to know

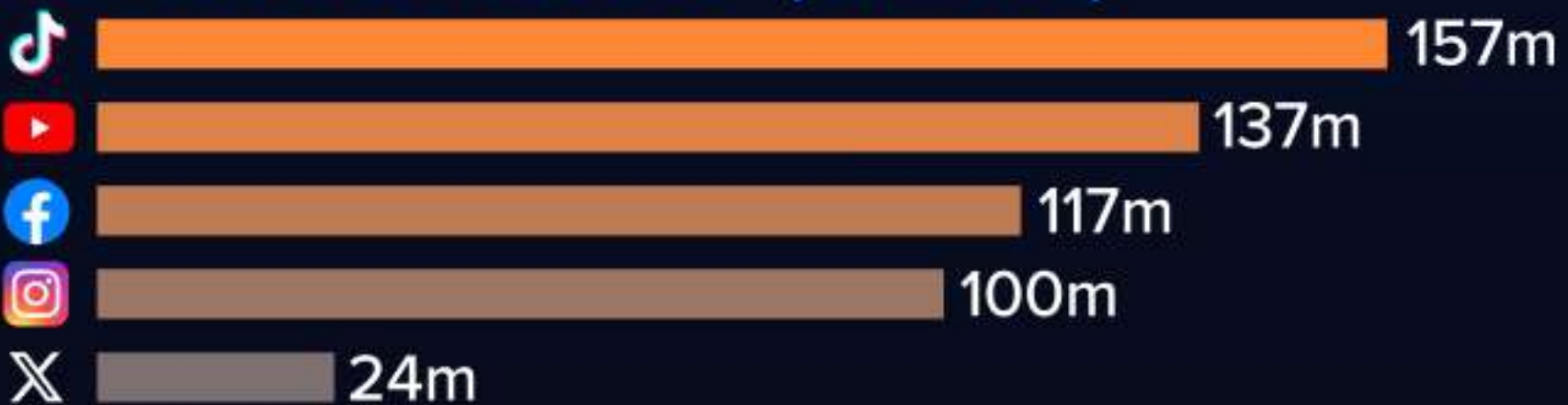
- Boom in short video fuelled by Instagram Reels & YouTube.
- TikTok is banned.
- A sharp generational decline, with only 4% of fans aged 55–64 compared to 37% aged 16–24.
- 85% of football fans also follow cricket.
- 20+ languages - a hyperlocal approach is required to communicate.
- Cricket dominates - explore crossover opportunities with the sport and its local stars.



Snapshot

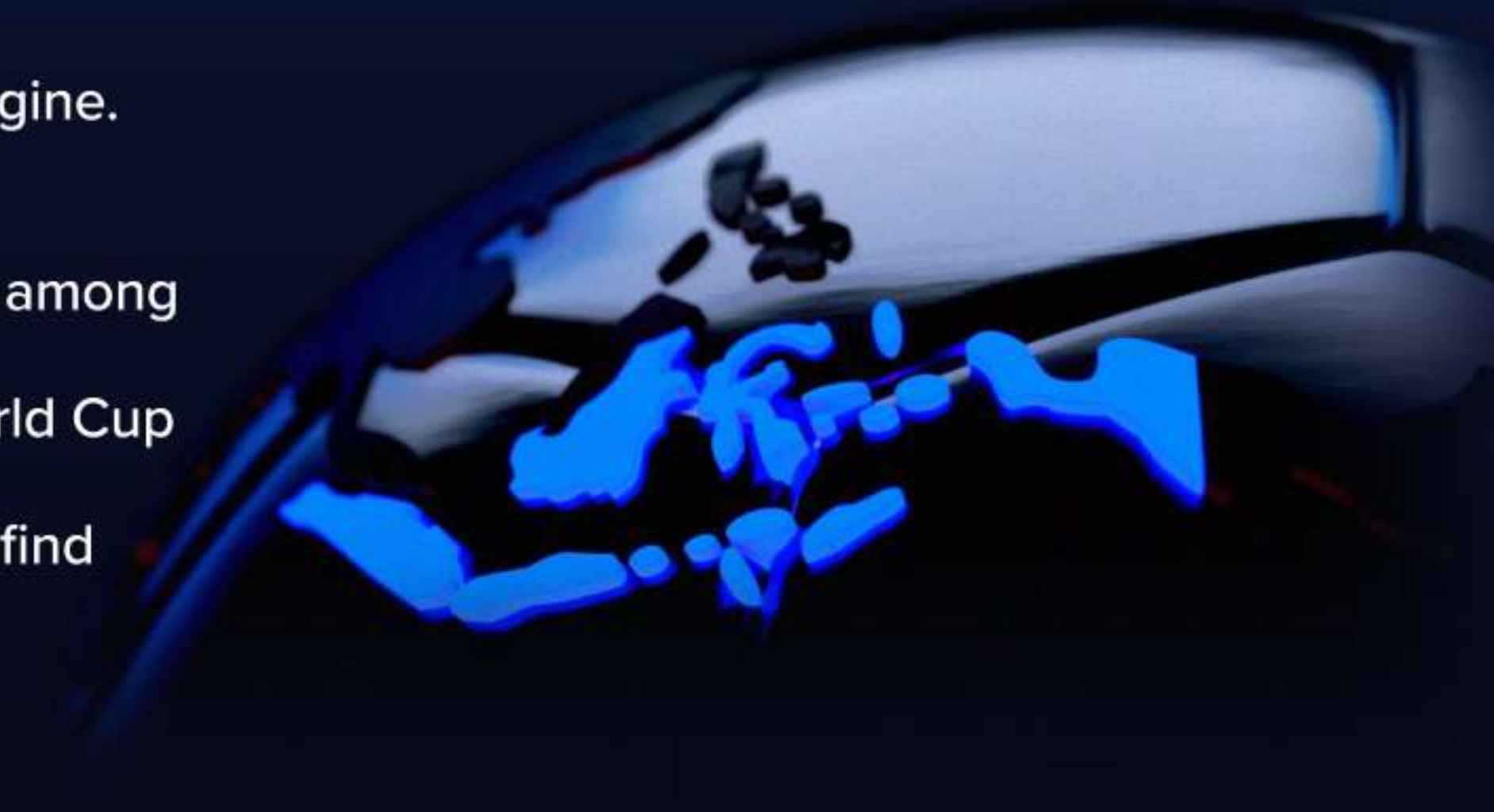
- Most sports fans:
Football - 86% Motorsports - 61% Badminton - 59%
- \$82bn - Indonesia's e-commerce value, the largest in SEA.

Social Overview (MAUs)



Need to know

- TikTok is the center of trends and the new search engine.
- 44% female football fans.
- A football fan base with 37% aged 16–25.
- Motorsports (67%) and badminton (62%) are popular among football fans.
- MotoGP (57%) rivals football events like the FIFA World Cup and UEFA Champions League.
- Explore crossover opportunities with motorsports to find new fans.



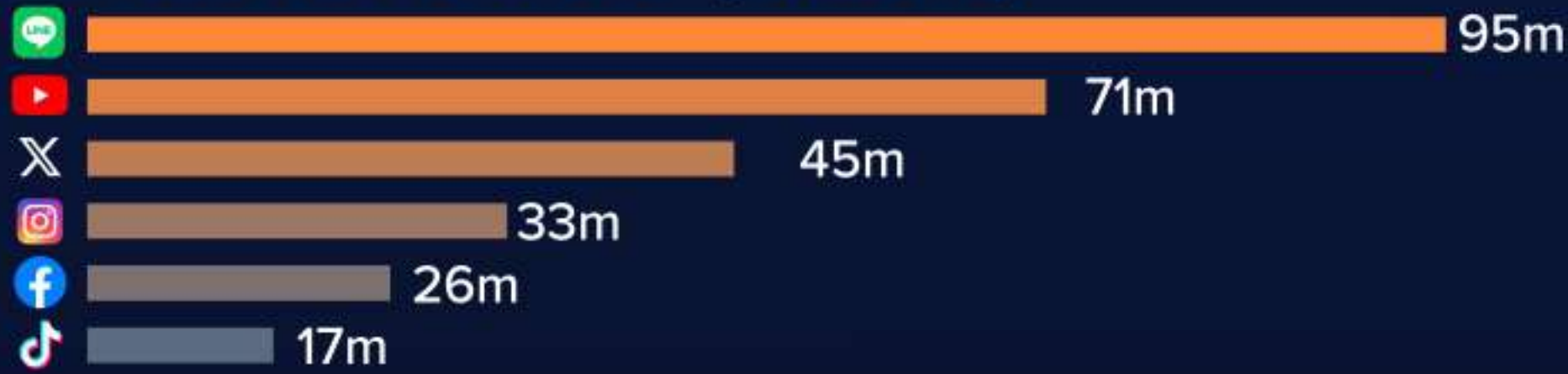
REST OF ASIA - JAPAN AND SOUTH KOREA



Snapshot

- 96m social media users, 78.1% of the total population.
- 51.4% of Japan's population is female.
- 92.1% live in urban centres.

Social Overview (MAUs)



Need to know

- 68% of the population are sports fans.
- 64% of football fans are male.
- The Summer Olympics (51%) and Nippon Professional Baseball (46%) drew significant interest from football fans.
- Football clubs can look to tap into baseball fans through local collaborations.
- Anime is booming - collaborating is a way to reach new audiences.



Snapshot

- 50.3M total internet users - 98.6% of the population
- 48.3M active social media users.
- 50.1% of the population is female.
- The total population is 51m.

Social Overview (MAUs)



Need to know

- Most popular sports
Football (76%) Baseball (46%) Basketball (26%)
- K-pop is dominating trends and has a fan base in the billions, clubs that have leveraged this craze have seen impressive social growth and engagement.



2025 PREDICTIONS

YouTube Dominates Across APEC Regions

YouTube will continue to solidify its dominance as the go-to platform for sports organisations across APEC, driven by its vast reach, accessibility, and monetization capabilities.

With increasing internet penetration and mobile usage, YouTube will enable leagues and clubs to engage fans through live streams, highlights, and behind-the-scenes content. Partnerships with local creators and localised content will deepen fan connections.



Deepseek Revolutionises How European Clubs Engage Fans

Deepseek took the world by storm in 2024, and we expect its impact in sport to be keenly felt in 2025. Leveraging Deepseek will enable personalized fan interactions through comments and Mini Programs, fostering deeper connections. Its data-driven insights will optimize match coverage, highlighting popular players and engaging content formats.

Real-time fan data monitoring will provide actionable insights, guiding marketing and merchandise strategies.



Douyin's Pay-Per-View Model Gains Traction with Rights Holders

Douyin Sports' Pay-Per-View (PPV) strategy will expand to include more global sporting events, including helping overseas top-tier leagues and national team competitions reach target audiences and monetize their content on the platform.

The platform's goal is to cover 25+ mid-to-top tier global football competitions and generate over a nine-figure total in revenue for the rights holders.



China's Grassroots Women's Football Thrives

China's grassroots women's football has expanded significantly, breaking the stereotype that the sport is unsuitable for girls. Participation has surged in school and amateur leagues, making football more accessible. Cities like Beijing, Shanghai, Shenzhen, and Chengdu have seen player-driven amateur leagues flourish. With both grassroots passion and policy support, China's women's football ecosystem is poised for sustained growth and success.



ABOUT

Mailman, an IMG Company

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 IMG, a TKO Company.

IMG

IMG is a leading global sports marketing agency, specializing in media rights management and sales, multi-channel content production and distribution, brand partnerships, strategic consulting, digital services, and events management. It powers growth of revenues, fanbases and IP for more than 200 federations, associations, events, and teams, including the National Football League, English Premier League, International Olympic Committee, National Hockey League, Major League Soccer, ATP and WTA Tours, the AELTC (Wimbledon), Euroleague Basketball, CONMEBOL, DP World Tour, and The R&A, as well as UFC, WWE, and PBR. IMG is a subsidiary of TKO Group Holdings, Inc. (NYSE: TKO), a premium sports and entertainment company.

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RED CARD 2025

ASIA DIGITAL PERFORMANCE INDEX