

RED CARD 2017

China Digital Football Index

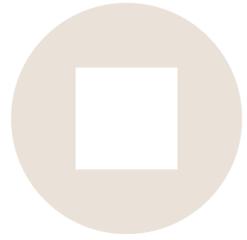
#RedCardChina



MAILMAN

REPORT TAKEAWAYS

- 1** **Manchester United** is the most influential team online in China, with the highest number of followers of any football club
 - 2** The **Bundesliga** has the strongest digital presence of any European football league in China, also the only league to launch a live stream
 - 3** **Mobile live streaming** has emerged as the most effective platform to engage & monetize a Chinese fan base
 - 4** **Cristiano Ronaldo** is the most influential player online in China, with 10x higher engagement than any other player
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EDITOR'S NOTE

Welcome to the Red Card 2017. Now in its 6th year, the report is read by over 5,000 industry professionals and is recognised as the leading indicator for 'off the pitch' performance of the world's best football teams.

What a year we've had.

It's never been a better time, with China's 'football revolution' now taking shape, we're seeing record transfer fees, investment funds, broadcasting deals, with the intent of establishing a \$1 trillion industry by 2025 a genuine target.

All this, largely in response to President Xi's commitment to winning a world Cup in the next 20 years. To achieve this, the government has a goal to see 50 million kids playing organised football and 100,000 soccer schools built in the next 8 years, football is now very much becoming part of Chinese culture.

The digital landscape has continued to provide exciting opportunities for football clubs and organisations. With 300 million users, live streaming has emerged as the hottest trend. Consumers are now being spoilt with new forms of original programming and the second screen is being fought by the large sports media networks.

We saw a shift in strategy for the world's best, with many top teams now recognising China as priority number one outside their domestic markets. Both Manchester clubs and Borussia Dortmund saw benefits after their China summer tour, and iconic clubs such as Liverpool, Tottenham Hotspur and Arsenal demonstrated their innovation around live streaming.

Congratulations to Manchester United on winning this year's Red Card. With an astonishing fan base, the club reaped great rewards from its China tour, local TV partnerships and an ever developing social media strategy.

2017 will continue to develop at a rapid pace. We're already seeing new platforms eager to explore football related content, the Weibo vs WeChat war is now over with both networks serving a role and sponsors are likely to be warming to the global game.

Thank you and enjoy the report.



Andrew Collins
Group CEO, Mailman
 @ACMailman

INTRODUCTION

The Red Card is a globally recognised study on the most influential European football clubs online in China. Red Card 2017 is the sixth annual report, and this year measures the performance of over 50 European clubs across 8 different digital metrics. The aim of this report is to educate teams and organisations on how to improve their China digital strategy.

China's football landscape has attracted global attention in the last 12 months and is now the number one international market for European clubs and leagues. New commercial opportunities continue to arise from the digital, media and sponsorship ecosystems.

PREVIOUS WINNERS



ABOUT MAILMAN

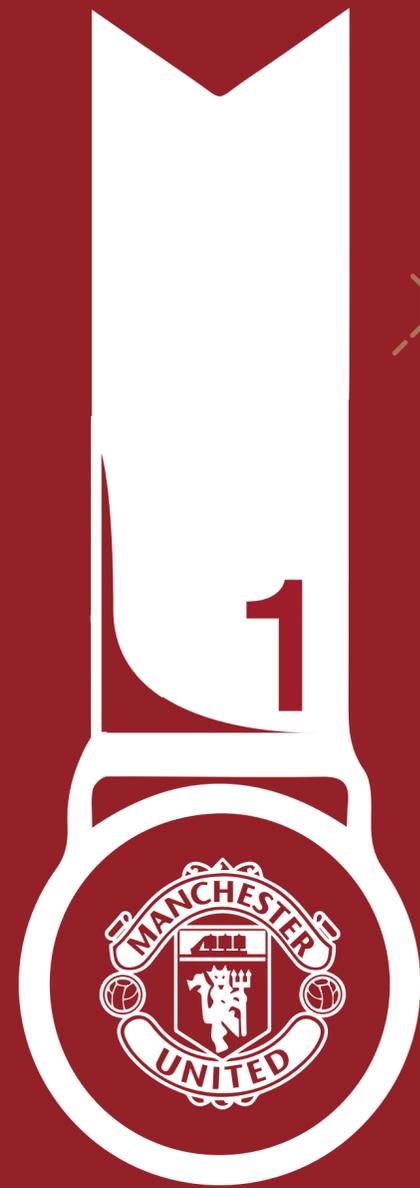


Mailman is China's leading sports marketing platform. We help global rights holders, athletes, and leagues build a successful business in China. We serve, invest and partner with our clients at every opportunity.

Our services include:

- ◆ Digital media
- ◆ Live streaming
- ◆ Press relations
- ◆ Commerce
- ◆ JV consulting
- ◆ Ticketing
- ◆ Strategy
- ◆ Investment
- ◆ Sponsorship

THE WINNERS



87pts



84pts



79pts



79pts



71pts

NOTE FROM MANCHESTER UNITED

China is one of Manchester United's most important markets and we have a long history of fan engagement with our Chinese followers. Recent changes in the Chinese digital landscape have enabled a revolution in how we connect and communicate with our fans in the country. Our partnership with Sina Sports has delivered MUTV and customised content, while WeChat has altered how we relate with our supporters.

Our summer tour in China set new standards in the integration of fan and commercial activities with a football pre-season programme. We embedded our Chinese media partners into the tour party, launched our home kit in Shanghai and supported multiple product launches for our sponsors; all firsts for the Club and all amplified by China's digital platforms. We are humbled to receive Mailman's Red Card award and enthusiastic about the promise of continuously innovating the fan experience for our loyal Chinese supporters.



Jamie Reigle
Commercial Director
Manchester United

METHODOLOGY

We assessed all European clubs online in China across eight different performance indicators to determine their level of influence. The data was collected between 1st September 2016 and 31st January 2017.



Full methodology available upon request

LEAGUE TABLE

CLUB	TOTAL	 FOLLOWERS	 WEIBO	 WECHAT	 LIVE STREAMING	 PRESENCE
1. 	87	8.8M	32	30	5	20
2. 	84	2.8M	32	22	5	25
3. 	79	4.2M	28	26	5	20
3. 	79	2M	28	26	5	20
5. 	71	8.2M	28	18	5	20
6. 	70	2M	28	22	0	20
7. 	64	400K	17	22	5	20
8. 	60	1.4M	16	14	5	25

CLUB	TOTAL	 FOLLOWERS	 WEIBO	 WECHAT	 LIVE STREAMING	 PRESENCE
9. 	59	1M	20	14	5	20
9. 	59	5.5M	28	11	0	20
11. 	50	2.7M	16	14	0	20
11. 	50	1.1M	9	11	5	25
13. 	40	1.2M	9	11	0	20
14. 	39	20K	5	14	0	20
15. 	36	480K	9	22	0	5

FULL TABLE AVAILABLE UPON REQUEST

WEIBO



Weibo is the number one social network for brand awareness and viral content. In 2016, it grew by over 70 million monthly active users.

In 2016 the platform fully launched Miaopai, a video channel with over 2.5 billion videos watched every day, and Yizhibo, its live stream network, with around 1.5 million daily active viewers. This year there was a 50% increase in the number of clubs on Weibo.



An independent report, provided by Weibo Sports, found that **FC Bayern** is the number one football team on Weibo.



Weibo's paid media tool has allowed clubs to push content to target specific audiences across the platform, creating more strategic alignment with marketing campaigns



Tom Elsdon
Senior Client Manager

WEIBO WINNERS

WINNERS

FC Bayern is the most engaged club on Weibo for the second year in a row.

Manchester United is the most followed club on Weibo with over 8.8 million fans.

HOW THEY WON ON WEIBO

- 1. Locally created stories** around the Chinese culture to develop new links between fan and the club.
- 2. Offline-to-online** experiences during Manchester United's China tour.
- 3. Highlighted the unforgettable moments** through video content, a medium that has an especially high reach.



WECHAT



WeChat has grown to over 800 million total monthly active users. It remains a vital part of Chinese netizens everyday life. The platform has become similar to an official China membership.

Whilst the readership is smaller than Weibo, the user base is far more significant to a football team.



Less than half of all teams online have launched an official WeChat account.



There is a huge misconception about the role of WeChat. It is not a social media network and should not be treated as such. A new follower on WeChat is 100x more valuable than on Weibo. Football clubs should use WeChat as their CRM platform for China.



David Hornby
Sports Business Director





WECHAT WINNERS

WINNERS

Manchester United has the largest active fan base on WeChat, reaching 700,000 monthly reads.

HOW THEY WON ON WECHAT

- 1. Understanding** the nature of WeChat. This channel has evolved to become clubs' CRM platform in China
- 2.** The WeChat fan base are the team's **core fans**, the club's content on this platform is long form and more analytical than what's published on Weibo.
- 3.** Taking advantage of the **additional features** that WeChat offers e.g. WeChat ads



LIVE STREAMING



Live streaming has been the biggest digital trend in China this year. Over 200 live stream platforms have been launched aiming to gain market share of the 300+ million users. Chinese live stream apps, incorporating virtual money, have innovated far quicker than in the West.

This, as well as demand for high quality live stream content, has opened up an additional revenue stream for football clubs.



Despite clubs being fully aware of the benefits from live streaming on their global channels, less than a quarter of the teams have published a live stream online in China.

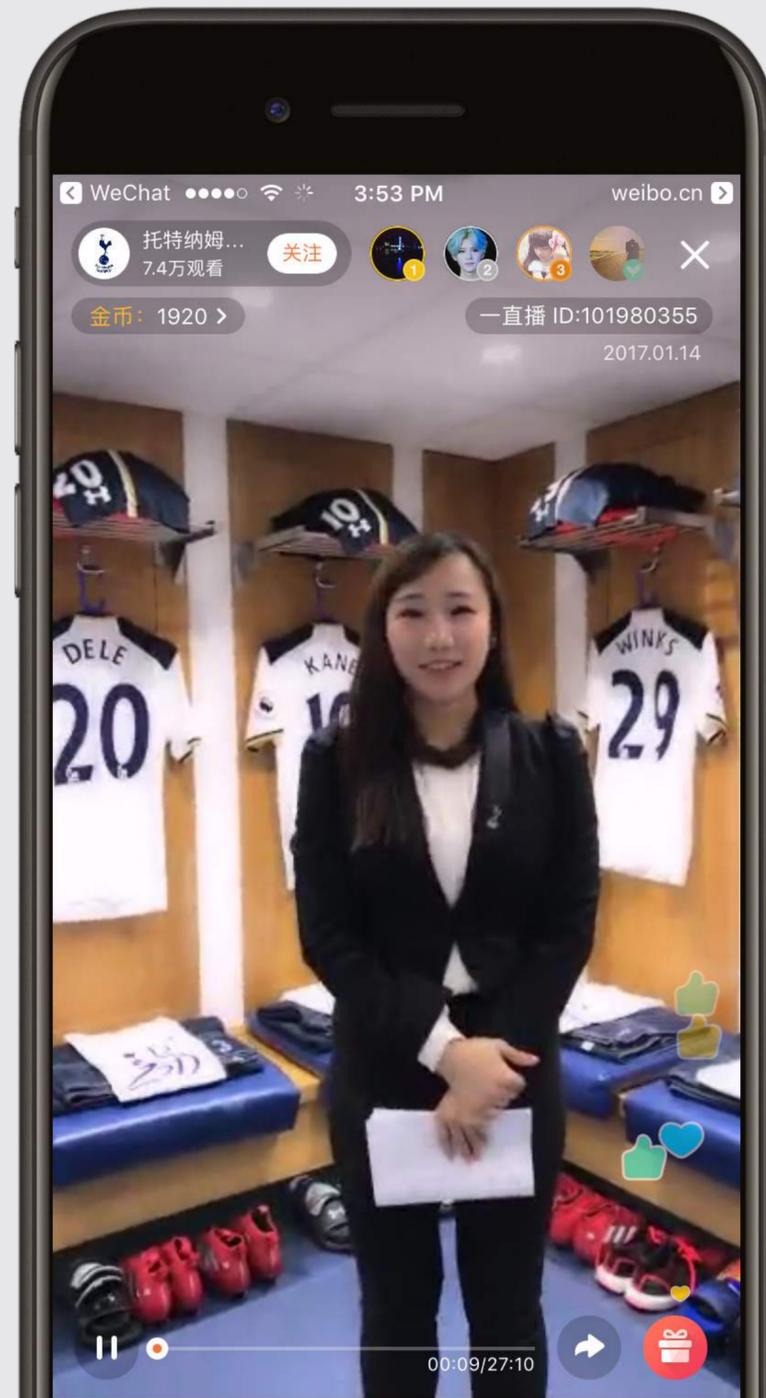


TV broadcast and digital subscriptions no longer meet fans requirements for football viewing. Live streaming will become the next big thing for the football industry online.



何一
Yixia Tech Vice President

LIVE STREAMING WINNERS



WINNERS

Borussia Dortmund published a live stream to around 500,000 people during their China summer tour, partnering with Penguin and Tencent Sports.

Tottenham Hotspur produced a live stream from White Hart Lane as part of their comprehensive Chinese New Year activation, including limited edition warm-up shirts.

HOW THEY WON ON LIVE STREAMING

- 1. Authenticity:** the live streams demonstrated the real environment of the club. Unrehearsed and honest footage resonates best with the Chinese fans.
- 2. Players:** star players in live streams are guaranteed to achieve the best results.
- 3. Chinese host:** an educated, bilingual host is key to the success of a live streamed episode.

LEAGUES

The Chinese market is the most lucrative for European football leagues. As the broadcast landscape becomes increasingly competitive, sports networks are paying record fees to acquire broadcast rights.

How the leagues perform online in China impacts the rights fees. European leagues were assessed on their Weibo followers and engagement, WeChat performance, live streams and website presence.



90pts



51pts



26pts



3pts

WHY THE BUNDESLIGA IS NUMBER ONE



1. Comprehensive presence. The Bundesliga is the only European league that has a full digital presence including a Chinese language website and has launched live stream content.

2. Relevant and topical. The Bundesliga has been quick to react to online trends in China, creating content pieces around these hot topics.

3. Team Germany. The league has leveraged the success of the German national team to attract a young and active fan base online in China.

NOTE FROM THE BUNDESLIGA

China and its 500 million football fans present fantastic opportunities for the Bundesliga and its clubs, which is why we are thrilled to be ranked most influential digital league in Mailman's Red Card digital football report for the second year in a row. The Bundesliga has been committed to digital innovation ever since we entered the market, and we are glad to see that our multi-channel digital strategy is reaping great results both in terms of reach and fan engagement.

We connect with Chinese fans in multiple ways throughout the entire digital ecosystem. In 2017, we will stay ahead of the curve in terms of digital innovation, with an unparalleled digital campaign as well as new and extended partnerships with major companies in the Chinese media and digital sector.



Christian Seifert
CEO of the Bundesliga

PLAYERS

Red Card 2017 is the first report to announce the most influential player online in China. Players were measured according to their Weibo followers, engagement and output. For players, it is increasingly important to grow their own brand on social media during their careers to ensure that they can leverage their popularity in the future.

Chinese social media is now a credible channel to grow revenue opportunities through either new sponsorship and endorsements, or increasing the scope on current global deals. Chinese fans' appetite for football stars' content has never been bigger.



Cristiano Ronaldo



85pts



Mesut Özil



65pts



Gareth Bale



64pts



Anthony Martial



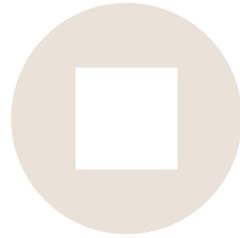
63pts



Wayne Rooney



59pts



PLAYERS ONLINE



China is an exciting opportunity for me. The passion from the Chinese fans is amazing and it's a great chance for me to give something back. Football is growing fast out there and I want to be more involved.



Anthony Martial
Professional Footballer

BEST PRACTICES FOR PLAYERS

- 1. Authentic:** Communicate in their native language, not just in Chinese
- 2. Exclusive:** Weibo should not be a replication of a player's global content feed. Posts created just for China work best
- 3. Sponsored posts:** Overly commercial messaging creates a negative sentiment and are often blocked by the network



NOTE FROM THE EXPERTS

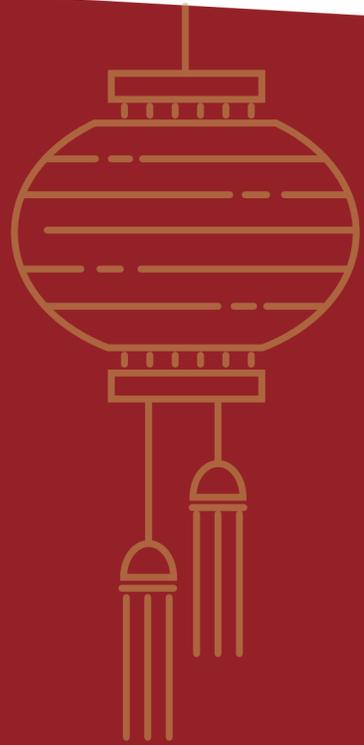
China's young netizens nowadays cannot leave their mobile devices alone and are now used to watching high quality sports matches and content.

Media networks will continue to develop consumers' habits of paying for high quality sports games and move the industry forwards together. The first priority is to provide a high quality watching experience, and at the same time, be involved in merchandising, ticketing and fan engagement campaigns. These will all help to attract more consumers that are willing to pay for the overall experience.

As for the media rights, the future does not necessarily mean paying unbelievable fees, media networks should target our consumers accurately and make our voice louder.



Ewell Zhao
GM of Tencent Sports



THANK YOU FOR READING

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Special thanks to our Rockstar team William, Rill, Tom, Polly and Fergus
for their hard work compiling this report.