

RED
CARD

RED CARD 2020

C H I N A

D I G I T A L

F O O T B A L L

A W A R D S

PRODUCED BY:



MAILMAN



FOREWORD

Dear Readers,

Welcome to the Red Card 2020: China Digital Football Awards. Now in its 9th year, the report continues to set a reference point for European football leagues, teams, and players, and their success across China's digital landscape.

In 2019 we saw record growth across the industry, with 12 teams venturing to the mainland to compete on tour. Digital continued to show huge growth with 16.3 million new followers on Weibo across the top clubs, and total engagement grew by 45% thus representing continued interest in the world's best football.

Douyin became a critical platform to engage young generation-Z consumers, now with over 20 teams actively building an audience, clubs are now realising they'll see more reach across this short-form video platform than others. Real Madrid topping 1 billion views and Borussia Dortmund with their fan-led strategy hitting record numbers.

Women's football continued to set new records with the FIFA Women's World Cup reaching new standards in digital performance. Whilst local hero Wang Shuang, after spending a season with Paris Saint-Germain Féminine, became the most engaged player at the club, ahead of the mercurial Neymar and Mbappe.

National pride was no more evident with the Spanish team Espanyol jumping 27 places in this year's ranking following massive interest in China's golden boy Wu Lei debuting with the club. A prolific striker in the CSL, now making his mark on the international stage.

2019 wasn't without controversy, with all international sporting organisations on notice following the highly politicised events with the Houston Rockets and the NBA. We saw players and coaches from all sports having to become accountable for themselves online as China's netizens assert more influence on the success of a business in China.

Digital revenue has continued to become a focus, either through sponsor activation or leading clubs looking to commercialise their channels in China. Based on a CPM of 12\$, European football clubs left US\$67 million of digital revenue on Weibo on the table in 2019. We expect this shift to profitability to rise in 2020.

Thank you to everyone for participating in these awards and congratulations to the winners across the table and individual honors.



Andrew Collins
CEO
Mailman Group

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JUDGING PANEL



Andrew Collins
Mailman Group
CEO

CEO of Mailman Group, a global sports digital agency and consultancy. After acquiring Mailman in 2006, Andrew has transformed the company to become a global leader in helping the world's leading sports organisations serve their audiences and build their businesses.



Yu Lingxiao
Super Sports Media Inc
& iQIYI Sports
CEO

A senior marketing expert in rights commercialisation for the international sports competitions and a pioneer of Chinese paid sports competition field. Mr. Yu is CEO at Super Sports Media and iQIYI, both well-known digital sport platforms in China's broadcast market.



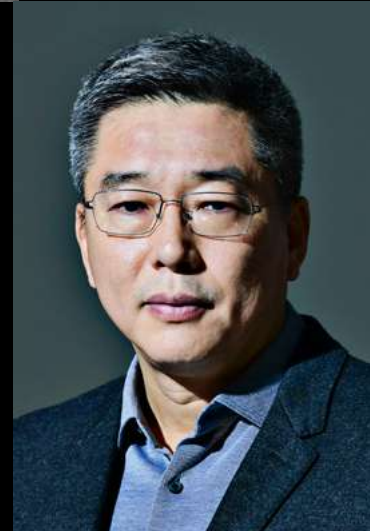
Wang Dong
Suning Sports Group
Executive Vice
President

In charge of the operation and management of the Suning sports media division. Committed to enhancing the user experience through the diversified operation of copyright, opening up the boundary between sports and retail and helping the healthy development of China's sports industry.



John Yan
Score Sports
Founder

As a diligent columnist, John Yan writes regularly for media like GQ China, Ft Chinese website, the New York Times Chinese site, 21st Economy, Football Weekly Magazine and Titan Sports Newspaper. He is long regarded as the most comprehensive and insightful media commentator on sport in China.



Liu Jianhong
Q Sports
President

Renowned presenter and soccer commentator, acted as producer of CCTV programs including "Soccer Night" and "Total Soccer". He is the first winner of the Golden Mic Award in the sports circle of China. On August 2, 2018, Liu was officially appointed as President of Q Sports.

JUDGING PANEL

**Yu Hang**

DDMC Fortis Limited
Executive Director

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.

**Li Shuangfu**

Lanxiong Sports
Co-Founder & President

Co-founder and President 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**

Weibo Sports
Director of
Operations

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

**Eric Geng**

China Sports Media
Senior Director

Leads strategy and business development at CSM, ranging from media rights acquisition and distribution, consultancy, investment to PR. Prior to CSM, Eric was the senior principle at China Media Capital (CMC), and played an important role in CMC's investments in City Football Group (CFG).

**Nikki Wang**

Deloitte
Head of Sports Business China

Currently based in Deloitte's Beijing office and leading the sports business from Deloitte in China. Has actively initiated sports consultancy projects with Chinese clients and developed collaboration opportunities between international clients and China in major sports.

THE WINNERS

NO.1
Football Club
Online in China:
FC Barcelona



NO.1
Football League
Online in China:
Premier League



NO.1
Football Player
Online in China:
Cristiano Ronaldo



THE WINNERS

Best Fan Event:
FC Bayern Munich



Best China Tour:
Tottenham Hotspur



Best Original Video:
Chelsea FC



爱奇艺体育

Best Sponsorship:
IQIYI



Best CSR Project:
AIA




The Weibo Award:
Chelsea FC




Best Grassroots Project:
La Liga



Best Use of Influencers:
Manchester United



Best Use of Technology:
Paris Saint-Germain




Best Use of Design:
FIFA



Best Use of Fan Clubs:
Borussia Dortmund



Most Viewed Video on Douyin Award:
Paris Saint-Germain



MOST POPULAR CLUB ONLINE

NO.1
FC Barcelona



NO.2
Real Madrid



NO.3
Chelsea FC



“We’re delighted to accept the award for Number 1 Club online in China as part of the Red Card awards for 2020. It’s a testament to the effort, team work and innovation of all of those involved with FC Barcelona in China. All Barça fans around the world have something in common – a love and passion for the Club, shared values and the way we play football. Our challenge is to create content for China that is bespoke to the ever-evolving digital landscape, culture and habits of this market and we’re proud to be recognised for outstanding fan growth and engagement.”

Dídac Lee,
FC Barcelona Board Member

”

CLUB ANALYSIS

The last 12 months demonstrated the growing strength and popularity of European football clubs online. There was over 100% year-on-year growth in new followers on Weibo, and more European clubs launched online

F C B A R C E L O N A

GROWTH ON WEIBO CHART 2018 vs. 2019



BIGGEST MOVERS AND SHAKERS

Disruptor: RCD Espanyol de Barcelona is the biggest mover in the top 15, climbing 27 places. This is the first major change in the usually consistent top 15. Signing Chinese national superstar Wu Lei has been instrumental in their growth.

China Tour Impact: Tottenham Hotspur, Juventus, Manchester United, Inter Milan, Manchester City, Paris Saint-Germain and more visited China during the summer and activated extensively across digital channels to improve their position. Coincidentally, Arsenal, FC Bayern, and Liverpool did not visit the region and dropped down the rankings.

Premier League Power: Chelsea broke into the top three for the first time as the highest ranked Premier League team thanks to their highly effective local video strategy, 2 million follower growth on Douyin and 1.3 million new followers on Weibo.



DOUYIN FOCUS

In 2019, the football digital landscape continued to evolve as Douyin became a key platform to determine club success. Due to its algorithm-based model, the app is opening up football brands to potential new audiences. Clubs realised this potential with PSG's most viewed Douyin video hitting 108 million views, the highest of all European football clubs, and boasting 6x more engagement than their total engagement on Weibo for the whole year. Below we identify the top performing content on the platform and why it worked:



Players with Chinese Street Food Vendor

108 Views (m) **2.9** Engagement (m)

Why it worked:

Local culture x player curiosity x trending background music



Pulisic Rescues Child Pitch Invader

74 Views (m) **2.7** Engagement (m)

Why it worked:

Star player x emotional response



Freekick rescue below block

69 Views (m) **2.4** Engagement (m)

Why it worked:

Global talk about unusual rescue x good editorial to highlight



Messi's Penalty Pass to Suarez

64 Views (m) **2.3** Engagement (m)

Why it worked:

Good utilisation of music x editorial leveraging the moment



Ederson Running Out of Goal

62 Views (m) **1.7** Engagement (m)

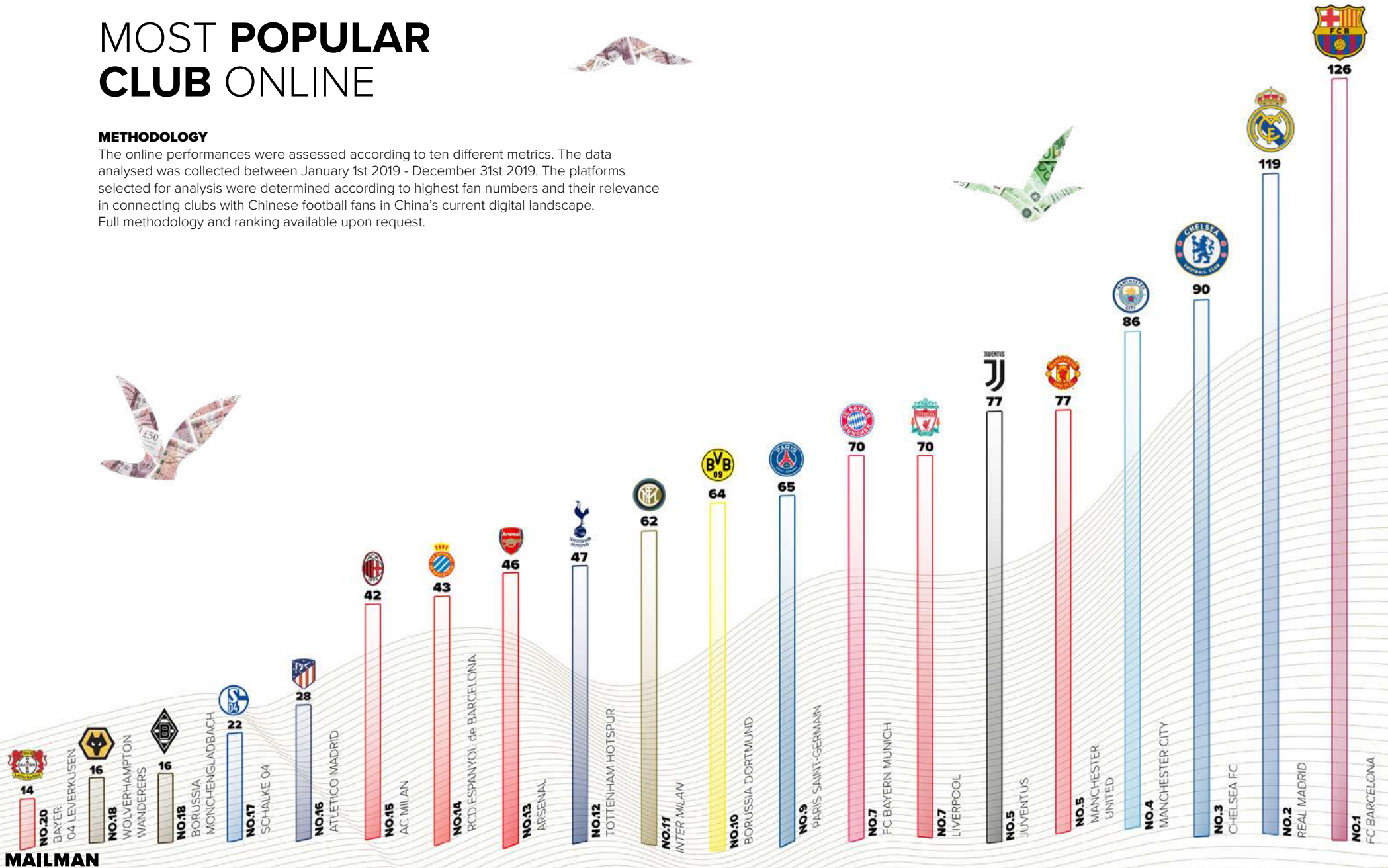
Why it worked:

Funny editing with Guardiola reaction x attracting casual fans

MOST POPULAR CLUB ONLINE

METHODOLOGY

The online performances were assessed according to ten different metrics. The data analysed was collected between January 1st 2019 - December 31st 2019. The platforms selected for analysis were determined according to highest fan numbers and their relevance in connecting clubs with Chinese football fans in China's current digital landscape. Full methodology and ranking available upon request.



MOST POPULAR PLAYER ONLINE

NO.3

Lionel
Messi



NO.2

Neymar Jr.



NO.1

Cristiano
Ronaldo



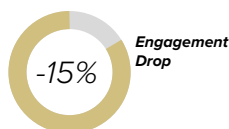
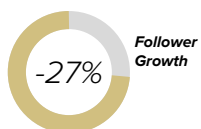
“
“I am very pleased with this award. I know that I have a huge part of fans in China and it means a lot to be on top of the table for the second year in a row. Thank you very much for this, it's a pleasure to be with you all.”
”

Cristiano · Ronaldo

PLAYER ANALYSIS

INTRODUCTION

A mixed year for players online in China. After a record breaking 2018, player accounts decreased in performance metrics on Weibo with a widening gap between the top 5% and the rest of the pack. Annual follower growth had an overall decrease of 27% and engagement experienced a 15% drop. The fall in performance comes as most players failed to adapt their content to changing Chinese audience behaviours, especially with more users turning their focus to video and platforms such as Douyin to consume icon content.



C R I S T I A N O

CR7'S REIGN CONTINUES

Despite the decrease in account performances on Weibo, Cristiano Ronaldo continued to dominate, retaining the top spot as the number one footballer online in China. Ronaldo led all digital performance metrics, ending the year as most followed international player on Weibo. He was also one of the few players to see both his Weibo engagement and follower growth increase from the previous year.



KEY MOMENTS

1. Only one player made the trip to China for their own individual summer tour this year. Paul Pogba traveled to China alongside his official sponsor adidas. In China, Pogba engaged with Chinese culture and fans by embracing local traditions in original video footage (i.e. Sichuan masks swapping), resulting in a growth of over 180k followers during his visit, 5x his average growth.

2. One of the biggest changes this year came from the addition of naturalised players to the Chinese Super League (CSL), with the China Football Association allowing foreign players to change their nationality to Chinese. Nico Yennaris, also known as Li Ke in China, has been the most active naturalised player on social, winning a series of awards and challenging the top athletes.

R O N A L D O

ADAPTING IS KEY TO SUCCESS

China continues to thrive as an icon market yet many players are yet to show full commitment to the country. In order to do so, players have to build a relationship with fans by adapting to new trends and generating bespoke local content. Giving fans the chance to interact and see a different side to the players through short-form videos will drive viewership and support. Neymar recognised this as he kept Lionel Messi in third place in the Red Card 2020 rankings thanks to the launch of his official Douyin account in January 2019. Neymar Jr. with 1.2 million followers is by far the most followed footballer on Douyin.

MOST POPULAR LEAGUE ONLINE

NO.1
Premier League



**Premier
League**

NO.2
La Liga



LaLiga

NO.3
Bundesliga



BUNDESLIGA

“To receive this Red Card award for the second year running is a great honour and testament to the Premier League and our clubs’ loyal fanbase in China.

We witnessed their passionate support during last year’s successful Premier League Asia Trophy in Nanjing and Shanghai, something that has been reflected by the growing popularity of our digital coverage in the country.

Through our dedicated content team we have delivered innovative and compelling content across key platforms such as Douyin and Weibo, while the tournament itself also provided a valuable opportunity to offer promotional support for PP Sports, as we officially launched our broadcast partnership with them.

We are committed to developing our digital presence in China and bringing the Premier League closer to millions of fans in the country.”

Richard Masters,
Premier League Chief Executive

”

LEAGUE ANALYSIS

INTRODUCTION

For the second year in a row, the Premier League is the most popular league online in China, continuing its strong performance and building on its momentum from last season to widen the gap at the top even further.

PREMIER LEAGUE'S ONLINE DOMINANCE

The league outperformed its European peers across all metrics and continued to strengthen its position at the top. Coverage around the Premier League Asian Trophy on digital supported growth, as well as widespread focus on Tottenham Hotspur and Manchester United's successful summer tours to China.

P R E M I E R

PREMIER LEAGUE ON DOUYIN

The Premier League's stand-out performance though was on Douyin where the league became the first to reach 1 million followers. The gap has widened from second place with the Premier League claiming almost 50% more followers.

The Premier League achieved early success on this platform through their content strategy:

- 1. Storytelling:** Ability to storytell in the local online language
- 2. Emotionalise:** Evoke emotions through content to non-football audiences
- 3. Icon Power:** Leverage star players from the past and present



FIGHT FOR SECOND

La Liga overtook the Bundesliga to finish second this year, with the German league reaching its lowest ever ranking. La Liga's ability to surpass the Bundesliga was through two key factors:



1. Douyin: Despite lagging behind the Premier League, La Liga produced extensive content around its strongest clubs and players, resulting in 1.2 million followers. The Bundesliga, with around 50,000 followers, are trailing Ligue One with 600,000 followers.



2. The Ronaldo gap: For the first full calendar year, the league was without one of its star players. Despite this, La Liga leveraged its new star player, the homegrown Wu Lei, to help create a local connection and stories. Espanyol's relaunch on Chinese social also complemented this growth.

L E A G U E

FUTURE

With the Chinese market becoming increasingly competitive and sensitive, it will be interesting to see how leagues respond to potential opportunities and risks in the new year. What we hope for though is a more collective and beneficial approach to China:

- 1. Increased innovation:** Working with broadcasters and social platforms to deliver new experiences to fans
- 2. Increased unity:** Collectively working together with domestic clubs and other football organisations
- 3. Increased purpose:** Focusing on how they can grow the game of football in China with new and old audiences

C H I N A
D I G I T A L
F O O T B A L L
A W A R D S

A W A R D S

BEST FAN EVENT

WHY THIS CATEGORY IS IMPORTANT

Offline is playing a bigger part than ever before in clubs' China strategies. Fan events are vital to uniting the community and bringing sponsors, partners, and the club, closer to the fans.

WHY THIS SUBMISSION WON

Bayern's submission impressed with its innovative approach to modern day fan events and its integration of Bundesliga broadcaster PP Sports. For the two fan events, PP Sports set up a live broadcasting studio, and for one of the matches, it was the first time this happened inside the club's office. A total of 1,200 fans attended the two viewing parties, which experienced live commentary, the launch of the Bayern fan zone in PP Sports, the opening of a new office space, and a meet & greet with club legend Elber. All offline and online activity integrated local sponsorship activations.

INSIGHTS INTO THE AWARD WINNER

1. Opened its new office space in November 2019 in Shanghai
2. Has with Müller the 5th most popular player online in China
3. 2nd highest engagement on Weibo

Silver



Gold



Bronze

JUVENTUS



BEST CHINA TOUR

WHY THIS CATEGORY IS IMPORTANT

Planned and executed correctly, a China tour represents the best opportunity to directly interact with, reward, and grow a fanbase. The same can be said commercially as clubs can activate existing partners in the region as well as demonstrate potential towards new brands.

WHY THIS SUBMISSION WON

Tottenham Hotspur's variety of offline/online activations and creation of bespoke services to its Chinese fans is what ultimately won over the judges in this category. To raise awareness of its first tour to Mainland China in 10 years, the club launched a creative influencer marketing campaign with famous singer and renowned fan Jason Gu. The club also launched a new online eCommerce presence on Tmall, offering bespoke China Spurs products through a combination of digital activations and offline events.

These were coupled with a number of player appearances that creatively embraced popular Chinese culture and integrated key commercial partners in the region, including Nike and AIA. The 'Fan Chant' campaign with Jason Gu quickly became the Club's most successful Weibo post of all time, receiving over 24k engagement and an estimated total viewership of 30 million. During the club's time in Shanghai, it was the fastest-growing on Weibo.

INSIGHTS INTO THE AWARD WINNER

1. The fan chant with Jason Gu was played on PPTV's live stream before the Summer Tour fixture against Manchester United
2. Launched a comprehensive Mini Program ahead of the tour called "The City of Spurs"
3. Three of the club's players have active Weibo accounts reaching a combined 5.6 million followers: Harry Kane, Dele Alli, and Harry Winks

Silver

JUVENTUS



Gold



Bronze



BEST ORIGINAL VIDEO

WHY THIS CATEGORY IS IMPORTANT

Video content performs 2x above average on Weibo in China. Original Videos 4x better than average. It's the single most important driver to sustainable growth of awareness and fan engagement in China. Too many clubs still publish mostly global assets which is not always relevant for Chinese fans and often not editing to local fan tastes.

WHY THIS SUBMISSION WON

The Chelsea Studio Show impressed with its dedication and innovation. The Chinese audience is now demanding new original content mediums that are built exclusively for them.

The Chelsea studio show is an interactive, engaging and locally relevant show led by top Chinese hosts with fan leaders. Throughout the year, the club worked with various celebrities and fans from around the country to provide them with a voice. In the first season, which was presented by global partner Yokohama, the 15 episodes delivered over 35.5 million video views, with the second season already underway.

INSIGHTS INTO THE AWARD WINNER

1. Most followed and engaged Premier League club on Douyin
2. Highest proportion of China original video content on Weibo
3. Fastest growing Premier League club on Weibo in 2019

Silver



Gold



Bronze

FIFA

BEST SPONSORSHIP

WHY THIS CATEGORY IS IMPORTANT

In an era where commercial success is at the center of football brands' international strategies, this award judged how effectively sponsorships were launched in China and whether the activation was creative, innovative and authentic in its communication with local fans.

WHY THIS SUBMISSION WON

Jiang zhong hou gu and its sponsorship with iQIYI identified a common difficulty with watching football in China and directly leveraged this in a unique manner to resonate strongly with the audience. They identified the touch point of staying up late to watch football and keeping a healthy stomach. They reached out to those watching football, specifically La Liga, late at night by showcasing nutritional characteristics of its branded products. They also utilised iQIYI's sports channel for women, targeting women who love sports and care about health. By combining targeting a specific user group with a unique touch point, Jiangzhonghougu was able to effectively transmit its brand onto fans in a positive manner.

INSIGHTS INTO THE AWARD WINNER

1. The OTT platform iQIYI Sports is showing all 380 La Liga games during 2019-20 season
2. Obtained exclusive digital rights to show Euro 2020
3. Announced it will stream the 2022 FIFA World Cup Asian qualifiers in September 2020

Silver



Gold



爱奇艺体育

Bronze



BEST CSR PROJECT

WHY THIS CATEGORY IS IMPORTANT

Brands and organisations in football have the power and influence to help millions collectively in their communities through CSR. With increasing fan bases and the popularity of football in China, this category rewards those that have helped grow the football industry and culture.

WHY THIS SUBMISSION WON

AIA celebrated its centennial year and Tottenham Hotspur's summer tour of Shanghai by launching the 3 vs. 100 challenge, where 3 first team players took on 100 children from the China Football Development Foundation (CFDF) in a game of football. They utilised media attention during the club's presence in the country to showcase the foundation, and helped to provide opportunities for Chinese children to meet their favorite players.

Many elements were built into this activation including an offline focus, online coverage, and collaboration between club and partners. This was also amplified across CCTV programs as well as being shared by other national and international media.

INSIGHTS INTO THE AWARD WINNER

1. Renewed its long standing official partnership with Tottenham Hotspur until the end of the 2026/27 season.
2. Delivered consistent football coaching programs across China over several years in partnership with Tottenham Hotspur
3. Signed with global media platform Dugout to boost the reach of its tie-up with Tottenham Hotspur.

Silver



Gold



Bronze

中国平安
PING AN

BEST GRASSROOTS PROJECT

WHY THIS CATEGORY IS IMPORTANT

This award judged how well the grassroots initiatives submitted support the national goal to develop football in China through local programs which help grow football culture amongst youth.

WHY THIS SUBMISSION WON

The launch of the first ever La Liga Hope Cup in partnership with Kunming Municipal Government & China Sports Futurity Investment (CSFI). The Spanish league brought together six U-16 teams from Spain and six U-16 teams from China to compete. As one of the most competitive grassroots tournaments held in China, it brought together clubs such as FC Barcelona with the likes of Shanghai SIPG.

The key success factor was that this submission demonstrated what can be achieved when working with the government across grassroots. This initiative has been part of a broader strategy for La Liga in Kunming, having signed a MOU in December 2018. The excitement of the tournament drove over 280 million in media reach and almost 20 million impressions on Weibo.

INSIGHTS INTO THE AWARD WINNER

1. Fastest growing league on Weibo in 2019, over double the number of its nearest competitor
2. Agreed to launch the first permanent academy in China from 2021
3. Launched Weibo accounts for several clubs, providing assistance for them to grow in China

Silver



Gold



LaLiga

Bronze



万达集团
WANDA GROUP

BEST USE OF INFLUENCERS

WHY THIS CATEGORY IS IMPORTANT

Influencer marketing in China is showing no signs of slowing down and football organisations are increasingly looking to utilise this approach to try to grow followers and engagement. This category recognised football IP that successfully worked with a range of influencers throughout the region.

WHY THIS SUBMISSION WON

The club launched an activation with Chinese mega celebrity Lu Han. The key reason behind the club winning was the scale and authenticity of this collaboration. Lu Han has one of the most passionate fan bases, in particular with the Chinese youth, whilst he is also a genuine Manchester United fan.

The activation took place on Chinese social with 9 different social posts from both the club and the star. This resulted in over 4.5 million engagements on Weibo with the initiative reaching 320 million hashtag reads.

INSIGHTS INTO THE AWARD WINNER

1. Most total engagement from a club on Weibo in 2019
2. Most followed club on Weibo with over 9.5 million followers
3. Launched a dedicated Chinese-language App

Silver



Gold



Bronze



BEST USE OF TECHNOLOGY

WHY THIS CATEGORY IS IMPORTANT

This award considered how well the football brands used new forms of technology to create an innovative solution or experience for Chinese users. These new mediums enable brands to go beyond the basic functions offered by social platforms to build something unique.

WHY THIS SUBMISSION WON

This was the only H5 developed by a club during China tours, and enabled all fans throughout the country to feel part of the journey at each of the three matches. The game included tour content, match information and giveaways, and integrated all major club partners, which was key to them achieving success in this category.

The game design was based on a Monopoly look and feel with Chinese characteristics, whilst the tech development enabled it to be launched and accessed from all official channels. The H5 game was successfully promoted by social channels as the launch post on Weibo was the most engaged post from a football club during the summer tour with more than 200,000 total engagements.

INSIGHTS INTO THE AWARD WINNER

1. Longest ever China Tour by any football club, travelling across three cities over 13 days
2. Social amplification of the H5 game was key, with the launch post being the club's most engaged during tour
3. Produced the most viewed Douyin video ever by any football brand during tour

Silver



BUNDESLIGA

Gold



Bronze



体奥动力
China Sports Media

BEST USE OF DESIGN

WHY THIS CATEGORY IS IMPORTANT

This award judged how well football brands developed a creative and local design as a digital media asset. Football fans no longer want to just see a static image. By creating a unique design for Chinese audiences, football brands are able to differentiate themselves in a saturated newsfeed.

WHY THIS SUBMISSION WON

This submission successfully captured the voice of the people, the trend around women's football, and national pride. Ahead of the FIFA Women's World Cup, the FIFA Chinese social channels provided fans with the platform to share their words of encouragement towards the China Women's National Team. The best fan messages were then converted into an illustration with the words representing different parts of a Chinese female football player.

The Chinese audience is extremely patriotic, and by providing a platform for fans to share their voices, FIFA created a unique and relevant campaign for the Chinese community. The final graphic reached over 1 million reads across all FIFA social graphics, with the design being shared also by the FIFA Museum.

INSIGHTS INTO THE AWARD WINNER

1. Most followed football organisation online in China
2. One of many from FIFA celebrating the FIFA Women's World Cup, including the launch of a Mini Program for a second year in a row
3. Most engaged football organisation



BEST USE OF FAN CLUBS

WHY THIS CATEGORY IS IMPORTANT

This award measured how well football brands built and managed a strong community in China within digital platforms. The core community is an extremely important foundation for a brand to build on, to organise and to empower advocates that can generate a larger impact than thousands of casual fans.

WHY THIS SUBMISSION WON

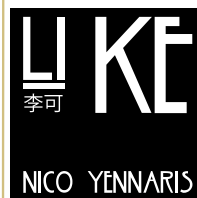
A major challenge clubs are facing in international markets with their global membership programs is that they don't offer value to local fans. With a lack of regional or historical roots to football clubs, developing a sense of community and self-organisation by fan clubs is challenging.

BVB launched Hero Circle in May 2019 through a WeChat Mini Program with the main purpose of organising fans together and building this community. Fan clubs are able to organise all their events through the Mini Program, whilst the club can use this channel to support with merchandising and promotion. Members can share their stories via their own integrated social media feed and forum.

INSIGHTS INTO THE AWARD WINNER

1. Most followed German football club on Douyin
2. 2nd most popular Douyin post ever by a football brand with 74 million views
3. Marco Reus launched on Weibo with the 3rd most popular Weibo launch post of any football player

Silver



Gold



Bronze



WEIBO AWARD & MOST VIEWED VIDEO ON DOUYIN AWARD

WEIBO AWARD



WHY THIS AWARD WAS INCLUDED

Weibo is one of the most important platforms for football organisations to succeed online in China. Weibo has continued to grow in sophistication and effectiveness throughout 2019, enabling leagues, clubs, and players to target potential and existing fan bases.

Here are the key figures relating to the 80+ football brands active on Weibo in 2019:

5.7 billion total impressions

16.2 million total new followers

15.5 million total engagement

WHY THEY WON

Chelsea became the number one Premier League club online in China for 2019 thanks largely to their performance on Weibo. The club experienced a record-breaking year:

1. 3x higher follower growth on Weibo than Manchester City and Manchester United, the fourth and fifth placed teams online in China
2. Record engagement for the club with over 600,000 total engagement
3. Chelsea's studio show was awarded 'Best Original Video'

MOST VIEWED VIDEO ON DOUYIN AWARD



WHY THIS AWARD WAS INCLUDED

The Douyin award has been included for the first time following the organisation's incredible growth in 2019. The platforms on Bytedance have become integral for football organisations to grow their audiences online in China. Due to the algorithm approach, clubs can reach new fans through organic and original content.

Here are the key figures relating to the 30+ football brands active on Douyin in 2019:

4.2 billion total views

12 million total new followers

140.4 million total engagement

WHY THEY WON

Paris Saint-Germain was announced as the Douyin award winner due to their commitment and viral success on the platform:

1. Number one Douyin video from any football brand reaching over 106 million total views
2. Over 820,000 new followers on the platform
3. Surpassed 8 million in total engagement

Weibo
Award



Most Viewed
Video on
Douyin Award



A N N U A L

I N D U S T R Y

T A K E A W A Y S

& O U T L O O K

DIGITAL MONETISATION

OVERVIEW

In the last 12 months, there has been an estimated US\$677 Million (based on an average CPM of US\$12) of digital sponsorship revenue left on the table in China from football organisations. This section provides a guide as to how a football player, club or league can realise revenue from digital assets in China. This focuses on digital sponsorship through branded content and advertising, there are however other digital revenue mediums including eCommerce, digital membership, and even behind-the-paywall content.

BRANDED CONTENT

Definition:

Content that is sponsored natively by a partner.

China executional guide:



01

Understand what existing content series can be sponsored



02

Propose new social concepts for existing and future partners



03

Provide a valuation for the content series to be sold / offered to partners



04

Create and deliver the branded content across official channels

Principles of branded content:

Longevity

Create a product that builds affinity with the fan for the long term

Authentic & Creative

Develop a genuine and innovative concept, integrating successfully both brands core values.

Subtle

The sponsor should not be excessively exposed

Core platforms:



WHY A BRAND WANTS TO SPONSOR DIGITAL CONTENT:

Emotionalise its brand

Drive mass exposure / conversion

Develop credibility

Target new audiences

ADVERTISING CONTENT

Definition:

Content that can be advertised on.

China executional guide:



01

Identify the full video content portfolio and tentpole moments in the calendar
- the more unique the better



02

Develop packages that can be sold to existing partners / through platforms advertisers



03

Work with the Chinese platforms to negotiate license fee and revenue share agreements



04

Publish the content across social channels

Formats of advertising:

Video commercialisation

Overlap / pre-roll / banner advertisements

Hashtag pages

Development of bespoke mini-sites to feature advertisers

Platform resources

Opening screen and banner resources

Core platforms:



WOMEN'S FOOTBALL IN CHINA

2019 was the year of women's football across the world. In China, the FIFA Women's World Cup helped to further promote the sport as a whole and change the perception of the women's game for fans of any gender.

FIFA WOMEN'S WORLD CUP CATALYST

If China needed new reasons to follow, then the FIFA Women's World Cup was a perfect opportunity. The China Women's National Team qualified for the tournament in France, and the country was vocal in its support of the team online. The 'Steel Roses', who were one-time finalists and two-time hosts of the tournament, have a higher ranking than the men's team and are a true source of inspiration for young Chinese players & fans.

The tournament was covered across social media, including seven of FIFA's Chinese social channels, with the tournament reaching over 1 billion hashtag reads - 20x higher than the 2015 event. Meanwhile, the tournament was broadcast live on CCTV5, the number one sports channel in China, reaching hundreds of millions of households. Sponsors activated around the tournament, not limited to FIFA's official partners, as brands invested money into becoming the driving voices behind the sport's growth.

STAND OUT VOICES

The China Football Association (CFA) was one of the leading voices online as they inspired a national following for the Women's Team and individual players. The CFA launched a #sHeroes campaign around the tournament and ongoing coverage, reaching 180 million total reads on Weibo.

FIFA covered the tournament with a series of activations, including the first ever women's football WeChat Mini Program, an animated video series called 'This is my Story' and live studio shows integrating partners, fans and celebrities. These initiatives led to an increase of 453k new Weibo followers - around 2x higher than the NBA during the Finals.

CHALLENGES

The China challenges are reflected from those in the global game, but even stronger due to a lack of participation and consumption in the men's sport. For China, some of the records were only broken because the previous levels were so low.

1. Lack of media coverage: Despite CCTV5 coverage, there was limited support from other sports networks, especially once the Chinese team was knocked out. This has been key to the growth of other men's and women's sports in China. In comparison to the 2018 FIFA World Cup, CCTV5 sublicensed the broadcast rights to Youku and Migu (powered by China Mobile), yet the 2019 tournament was not available on any of these online platforms.

2. Lack of fan voices: There is a higher percentage of male fans following the women's game in China, and typically from an older demographic. In China, there is limited connection between the sport and younger demographics who will carry it forward. Separately, there is also a lack of loud voices, there was no Megan Rapinoe or industry figures to inspire a new generation to play, to watch, and to love.

3. Lack of role models: The domestic clubs, of which many do not exist, have yet to create local icons in the sport. There are very few young girls that are growing up with posters on their walls of the China Women's National Team. Learning from other sports, this year saw the impact from UFC's first ever Chinese female champion with many starting to participate and consume, a similar situation would go a long way in football.

MOVING FORWARD

Despite the challenges, 2019 was a very positive year for women's football but this was just the beginning. It is a collective mission for all involved across digital, and is time for all readers to give back.



CHINA TOURS IN REVIEW

OVERVIEW

2019 was a bumper year for European football clubs touring China. In total, 12 clubs visited, each bringing out their biggest stars. Without the distraction of a major international tournament this summer, teams were able to showcase their top talent to the delight of local fans.

WHAT THEY DID



Tottenham Hotspur

Launched Chinese eCommerce channels including pop-up store at game vs. Man Utd. Reproduced Chinese version of global fan chant with Chinese celebrity Jason Gu. Extended global partnership with AIA.



Manchester City

150 million Hashtag reads, most of any club on tour. Utilised in-game integration of King of Glory. Advertised on Shanghai metro, crossovers with rock band 'Penicillin' and Puma pop-up store.



Juventus

Launched the 'J-Squad' - the first Asia-wide fan movement. 'J-Village', a fan experience center at the foot of the Shanghai Pearl tower, coinciding with the launch of a special-edition Chinese away kit.



Paris Saint-Germain

Completed longest ever China tour, playing three games in 13 days across Shenzhen, Suzhou and Macau. Launched a fashion show and fan event with Accor and Nike, whilst partnering with Tencent Sports to amplify tour events.



Manchester United

Opened the very first China Experience Preview Center in Beijing. Launched exclusive adidas merchandising as well as crossovers with eSports stars. Produced long-form studio show called 'Man Talk' as well as releasing dedicated China App prior to tour.



Inter Milan

Ran a VLOG throughout tour with host Giada Cheng in English & Chinese. Played against Juventus in Nanjing, where they established early on a significant amount of offline advertising space across the city.



Wolverhampton Wanderers

One of the most active clubs throughout tour, with a megastore opening, fashion show, celebrity collaborations, and China kit launch. Winners of the Premier League Asia Trophy.



Borussia Mönchengladbach

First Football Club to visit China in 2019, taking in sights in Shanghai and Guangzhou, while playing against CSL team Guangzhou R&F. Launched Douyin, now 3rd most popular German club.



VFL Wolfsburg

Played exhibition match vs Eintracht Frankfurt in Foshan. 15 offline activities and activations with club partner Volkswagen.



Eintracht Frankfurt

Exhibition match vs VFL Wolfsburg and visited Hong Kong after. Traditional Chinese offline activations such as temple visits were conducted around the match.



Newcastle United

Joined the Premier League Asia Trophy against Wolves in Nanjing and West Ham United in Shanghai.



West Ham United

Participated in the Premier League Asia Trophy against Manchester City in Nanjing and Newcastle United in Shanghai.

TAKEAWAYS

- 01 Balance sponsors and fans:** Chinese audiences are quick to challenge a brand, especially when they feel an activation is overly commercial and lacking authenticity. Integrating fans into sponsor activations helps build positive impressions.
- 02 Realising dreams:** This is the one opportunity each year to realise a fans dream through meeting their heroes and idols. Often the small wins are overlooked in favour of broader social performance metrics.
- 03 Stadium sell out:** The pinnacle of a tour is the match, but we're still witnessing many empty stadiums. It is not only the promoter, but also the clubs' & fans' responsibility to ensure tickets are sold.
- 04 Making headlines:** The China tour is a great opportunity to combine the launch of a new initiative, be it eCommerce, new partnership, or a new kit.
- 05 Understand China:** Education on the China landscape and sensitivities is key for all players, staff, and management when on the ground to avoid any sort of PR crisis.

WHAT TO EXPECT FOR 2020

2019 was significant for the sports industry, especially in realising the impact that digital can have on the success and failure of a sports brand. The NBA, Arsenal, and several other high profile brands / individuals learned a difficult lesson this year. In 2020, a year that includes the Olympics and EUROS, we expect to see national pride further dominate the sports industry with new opportunities and changes online.

01 Growing the game

It's finally time for football and sports organisations to give something back. Too many have come to China looking for revenue and sponsors instead of focusing first on what they can contribute. Those that don't pivot priorities will be found out in an ultra-sensitive audience.

02 Beyond the game

Brands will look outside of just football into entertainment and lifestyle sectors to grow reach. 2019 saw football clubs begin this trend, and this will become a much larger part of the marketing plan in China in leveraging the popularity of film, music, fashion, and in particular, eSports.

03 National pride

Following a series of high-profile incidents in 2019, brands will now have to either play by China's rules or give up on this market. In an Olympic year, there is no middle ground. To be successful you must understand and comply with the local environment and the fans' patriotism.

04 Rise of the player

In a major national tournament year, Chinese brands will consider the benefit of working with a team instead of the player themselves. China is an icon market with a focus on the individual, meaning teams' partnership departments will need to sell a better emotional story and access to the players.

05 Storytelling overtakes performance

Football brands will need to raise the level of creative storytelling on China digital. Developing talent from outside of a sports digital background to help create new authentic stories will push digital teams into a new challenging landscape.

06 Digital revenue

The last few years have built up several examples of revenue driven digital initiatives. In the same way as the West, the smartest brands will work with platforms to create a fan experience that they are willing to pay for and consume on a regular basis.

ABOUT MAILMAN

Headquartered in Shanghai, China, Mailman is a global sports digital consultancy and agency. We help the world's leading sports organisations serve their audiences and build their businesses.

With over 200 experts across the globe we specialise in digital strategy, transformation, social media, content production and ecommerce.

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