

TRIBOO

CHINA'S FOOTBALL BUSINESS LANDSCAPE MARKET REPORT

NOVEMBER 2024

EASTMEDIA



CHINESE FOOTBALL MARKET OVERVIEW

FOOTBALL FANS: A SNAPSHOT OF KEY MARKETS

Global Football Fans
3,5 Billion



5 Major European Markets* Fans
131 Million

*Spain, Italy, Germany, France, and
the United Kingdom*



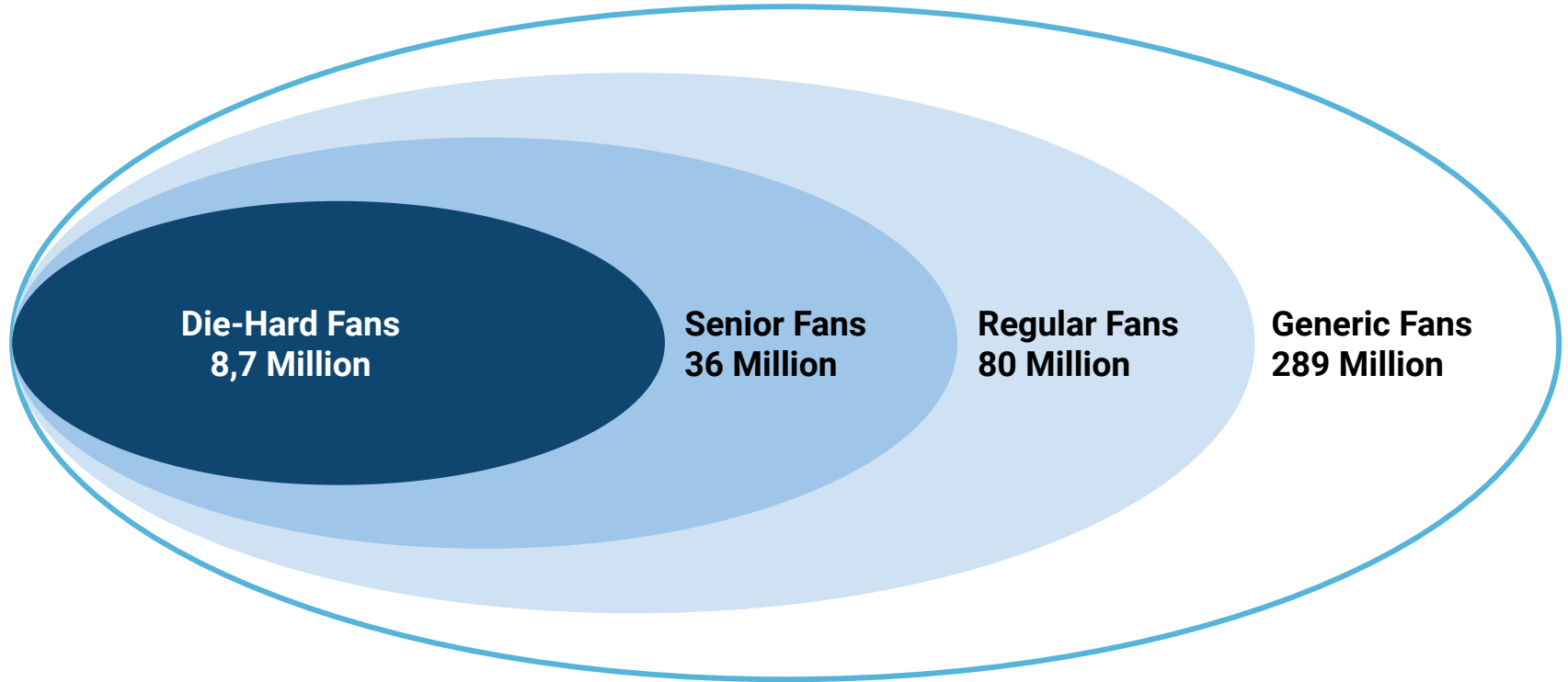
Chinese Football Fans
289 Million



- With **289 million** football fans, China holds one of the largest football fan bases globally, surpassing any single European market.
- This massive audience represents a substantial growth opportunity for the football industry, making **China a key market for fan engagement, digital innovation, and commercial expansion** in the global football landscape.

FOOTBALL FANS: A SNAPSHOT OF KEY MARKETS

CHINA MARKET



CHINA FOOTBALL MARKET: KEY DRIVER

CHINA GOVERNMENT SUPPORT

Chinese Football Mid-to-Long Term Development Plan (2016 - 1050)		
<ul style="list-style-type: none"> With Chinese President Xi Jinping publicly advocated for China to become a football powerhouse, China's Central Government together with Chinese Football Association (CFA) launched The Plan for economic development, global soft power and national rejuvenation. Football is positioned as an essential part of public health, an emerging industry for economic growth, a foundation for China's sporting aspirations, and a means to enhance national spirit. 		
Short-term (2016 - 2020)	Mid-term (2021 - 2030)	Long-term (2031 - 2050)
<ul style="list-style-type: none"> Establish a foundation with basic facilities Increase participation Promote grassroots football Key targets included building over 20.000 specialised football schools and increasing football participation among students and the general population. 	<ul style="list-style-type: none"> Aim for better performance and influence, with targets to make China a competitive footballing nation in Asia. Emphasis on improving professional leagues and training infrastructure 	<ul style="list-style-type: none"> Become a world football powerhouse Comprehensive development across all levels, including professional, grassroots, and international engagement.

CHINA FOOTBALL MARKET: KEY DRIVER

CHINA GOVERNMENT SUPPORT

Chinese Football Mid-to-Long Term Development Plan (2016 - 1050)

PRIMARY TASK

- **Talent Development:** Expand youth participation, improve training systems, and build a talent pipeline for coaches, referees, and players.
- **Facilities Construction:** Increase the number and quality of football pitches, especially in schools and communities.
- **Event and Competition Structure:** Develop a multi-tiered league system and encourage community-level tournaments.
- **Football Industry Growth:** Expand the football economy, including broadcasting, merchandising, and tourism. Encourage the integration of football with industries like finance, tourism, and digital media.
- **Global Exchange and Openness:** Attract foreign talent, improve international collaborations, and enable Chinese professionals to gain global experience.

GOVERNMENT SUPPORT

- **Financial Support:** Increase public and private investment in football.
- **Land and Facilities:** Ensure land availability for football facilities, with incentives for developing new grounds.
- **Tax Incentives:** Provide tax relief for football-related donations, club operations, and sports facilities.
- **Employment and Talent Development:** Create career paths for retired players and coaches, and support job creation in the football sector.

CHINA FOOTBALL MARKET: KEY DRIVER

ADVANCE TECHNOLOGY OF 5G, AI & AR

Chinese Football Mid-to-Long Term Development Plan (2016 - 1050)

- China has invested heavily in building a comprehensive 5G infrastructure, with millions of 5G base stations deployed nationwide
- This extensive network allows for high-speed, low-latency connectivity, supporting technologies like real-time streaming, augmented reality (AR), and virtual reality (VR), which are essential for immersive experiences in football industry.

5G Integration	AI Applications	AR Engagement
<ul style="list-style-type: none">• 5G Immersive Experiences: such as virtual stadiums, enhance real-time interactivity for fans, blending physical and digital realms for a new level of engagement.• Example: The "5G + Sports" virtual stadium concept allows fans to experience matches with interactive 5G cloud broadcasts.	<ul style="list-style-type: none">• AI Match Analysis: AI-powered systems use multiple camera angles and data tracking for smart broadcasting, automated refereeing, and performance analysis.• Data & AI Integration: IBM Watson collect and analyze player data, aiding in tactical optimization, recruitment, and match preparation.	<ul style="list-style-type: none">• Fan Interactivity: AR tech lets fans scan player kits or merchandise to access interactive features and experiences.• Example: Southampton FC collaborated globally to provide fans with an AR-enabled experience that brings players closer to the audience.



CHINESE FOOTBALL FANS DEMOGRAPHIC & BEHAVIOUR

CHINESE FOOTBALL FANS

KEY PERSONA

Male Dominant

Male: 77%
Female: 23%

Millennials Dominant

92% aged between 25 - 44
37% aged 25 - 34

Across All Cities

Tier 1 City: 20%
Tier 2 City: 15,6%
Tier 3 City: 26,3%
Tier 4 City: 24,6%
Tier 5 City: 13,2%



High Monthly Income

< €625: 30%
€625 - €1250: 20%
€1250 - €2500: 42%
€2500 - €6250: 6,2%
> €6250: 1,6%

High Education

40% Bachelor Degree or higher
37% Diploma Holder

Married with Kids

58,5% Married
44% Married with Kids

CHINESE FOOTBALL FANS

USER BEHAVIOUR - DIFFERENCE IN MINDSET

EUROPEAN FOOTBALL FANS

- **CLUB LOYALTY**
Strong, long-term loyalty to clubs, often supporting a team regardless of player changes
- **COMMUNITY CONNECTION**
Support clubs due to a sense of local or regional identity, connecting deeply with their community through the team
- **TRADITION**
Value traditional aspects of football culture, such as in-person match attendance and long-standing rivalries

VS

CHINESE FOOTBALL FANS

- **PLAYER LOYALTY**
Player-centric, following specific star athletes rather than remaining loyal to a single club
- **CELEBRITY APPEAL**
Support is often driven more by the star appeal and celebrity status of players
- **TRADITION**
More receptive to digital engagement, interactive content, and innovative viewing experiences like highlight reels, virtual events, and player-focused social media content

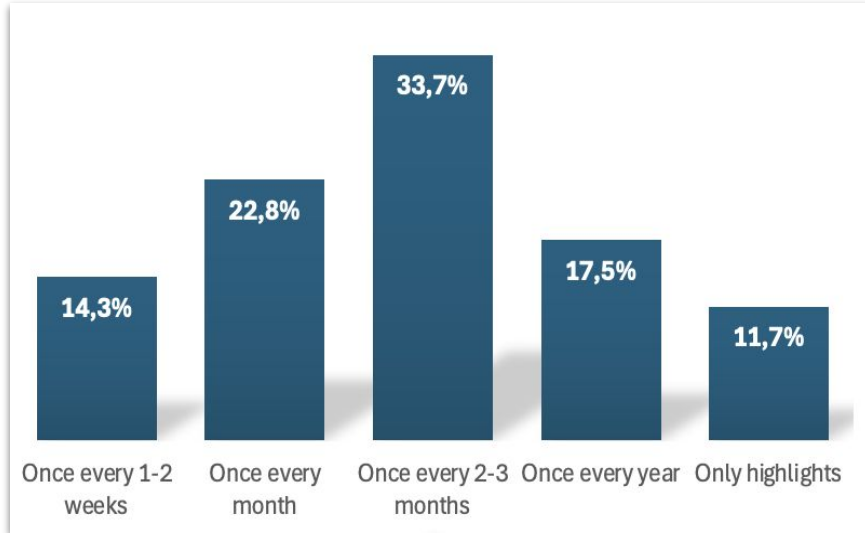
Insights for Chinese Football Marketing

- More effective when centred around individual players rather than clubs
- Benefit from leveraging players' personal brands and highlighting their celebrity status to engage fans
- Digital-first and interactive strategies can be more effective for engaging fans than traditional, match-day-focused approaches

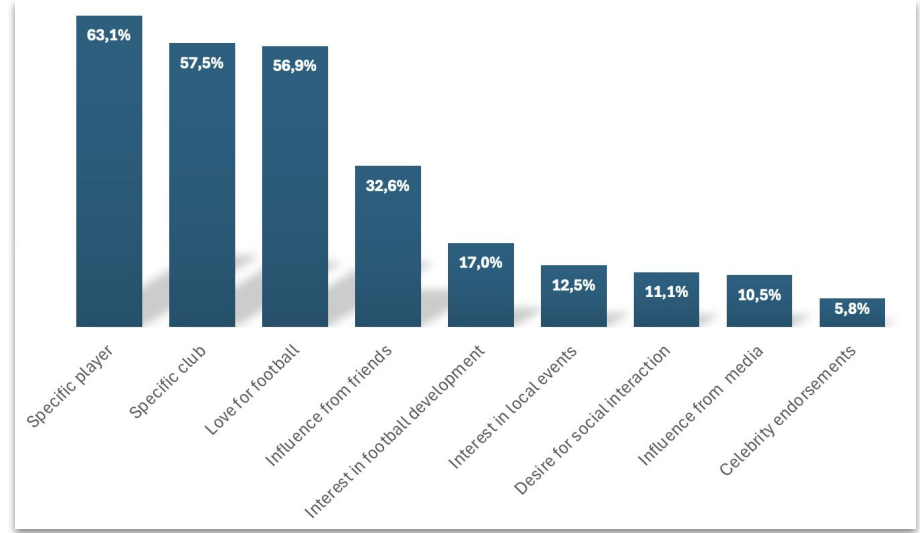
CHINESE FOOTBALL FANS

USER BEHAVIOUR - MATCH VIEWING HABIT

Frequency of Football Match Viewing



Reasons for Watching Football Matches

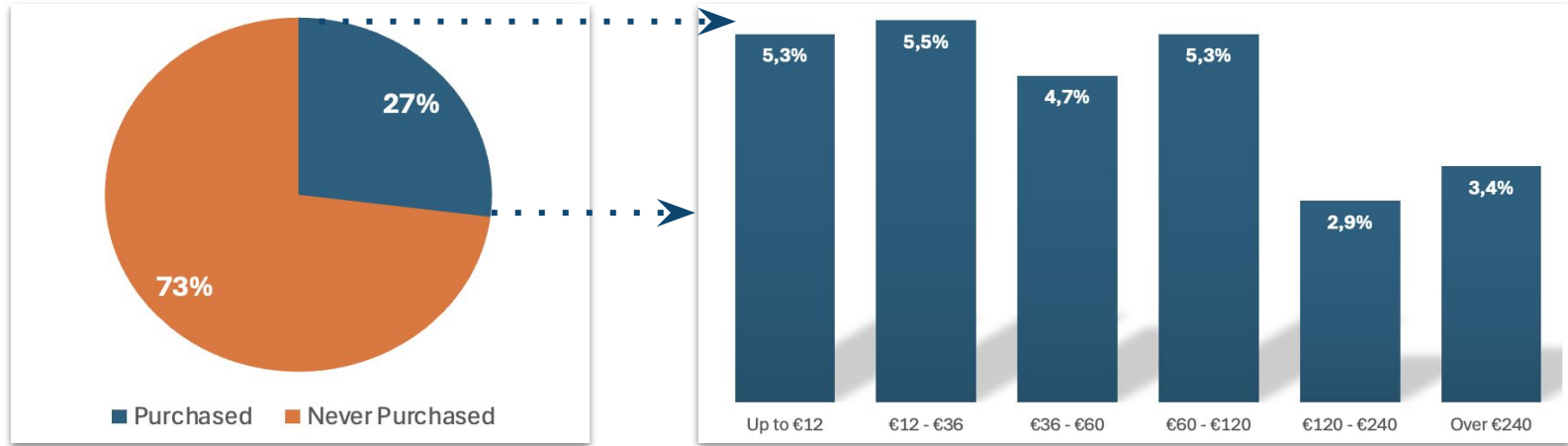


- **Fan Loyalty to Players and Teams:** With 63.1% watching for specific players and 57.5% for teams, leveraging popular players and strong branding can attract loyal Chinese fans.
- **Demand for Engaging and Flexible Content:** Irregular viewing habits (33.7% every 2-3 months) suggest a market to reach Chinese fans with highlight reels, interactive content, and special event broadcasts, catering to those highly engaged with key moments
- **Social Appeal:** 32.6% are influenced by friends, and 11.1% seek social interaction—creating community-driven campaigns can amplify fan engagement and growth.

CHINESE FOOTBALL FANS

USER BEHAVIOUR - MERCHANDISE PURCHASE

Football Merchandise Purchase Status

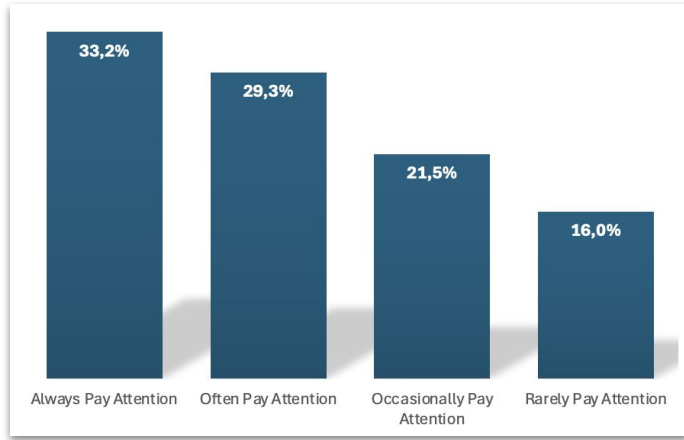


- **Market Potential Across All Price Ranges:** Fans who buy merchandise show spending across various price ranges, with 5.5% spending €12-€36 and 5.3% willing to spend up to €120. This indicates a broad audience for both affordable and premium products, providing multiple opportunities for merchandise strategies that cater to different budgets.
- Most popular spending category is **apparel, footwear, and hats (67.5%)**, followed by **home and lifestyle products (42.1%)** and office supplies (32.5%). Leisure food (26.2%), trendy toys (18.5%), and virtual products (14.0%)

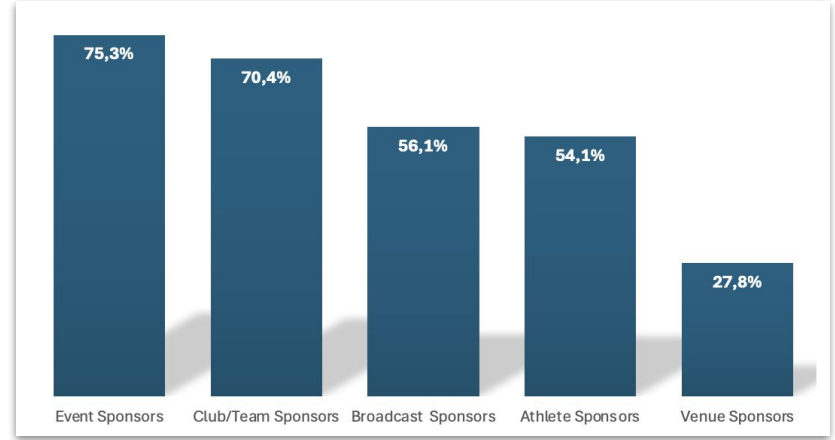
CHINESE FOOTBALL FANS

USER BEHAVIOUR - ATTENTION TO FOOTBALL SPONSORSHIP

Level of Attention to Brands Sponsoring Football Events



Fan Preferences for Different Types of Sponsorships



- **High Fan Attention to Sponsors:** Over 60% of fans either “always” (33.2%) or “often” (29.3%) pay attention to brands sponsoring football events. This high engagement level presents a prime opportunity for sponsors to capture fan attention and strengthen brand visibility.
- **Focus on Event, Team, and Media Sponsorships:** Fans show the highest preference for event (75.3%) and team sponsorships (70.4%), followed by broadcast (56.1%) and athlete sponsorships (54.1%). For football teams, investing in these areas can maximise fan engagement in China and create strong brand connections.

SOCIAL SENTIMENT OF FOOTBALL TEAMS

KEY INTEREST



Superstar Players and Coaches

- Prominent players
- Performance
- Associated transfers



Club Management & Strategy

- Club leadership
- Coaching strategy
- Contract renewal
- Lineup adjustment



Match Performance & Result

- Result prediction
- Match performance
- Strategy review



Major Tournaments

- FIFA World Cup
- UEFA Euro Cup
- AFC Asian Cup
- EPL English Premier League
- UEFA Champions League

SOCIAL SENTIMENT OF FOOTBALL TEAMS

MANCHESTER UNITED

FREQUENTLY MENTIONED TOPICS		
Topic	Keywords	Key Interest
Player Information & Squad Details	<ul style="list-style-type: none">• <i>"Manchester United player list"</i>• <i>"Manchester United players"</i>	<ul style="list-style-type: none">• Current squad• Details about individual players
Ticket Information & Match Attendance	<ul style="list-style-type: none">• <i>"How to buy Manchester United tickets"</i>• <i>"Manchester United stadium tour"</i>• <i>"Manchester United tickets"</i>	<ul style="list-style-type: none">• How to purchase ticket• Attend matches or tour the stadium
Match Previews & Rivalries	<ul style="list-style-type: none">• <i>"Manchester United vs Chelsea",</i>• <i>"Score between Manchester United and Chelsea"</i>	<ul style="list-style-type: none">• Matches with competitor teams like Chelsea
Club Management & Coaching Updates	<ul style="list-style-type: none">• <i>"Manchester United head coach"</i>• <i>"New Manchester United manager"</i>• <i>"Latest news on Manchester United's management"</i>	<ul style="list-style-type: none">• Management updates• Changes in leadership• Club's coaching team
Team's Performance & League Standing	<ul style="list-style-type: none">• <i>Manchester United schedule"</i>• <i>"Manchester United results"</i>	<ul style="list-style-type: none">• Team's performance in the league and schedule
Team Rivalries & Comparisons	<ul style="list-style-type: none">• <i>"Difference between Manchester United and Manchester City"</i>	<ul style="list-style-type: none">• Comparisons with rival clubs, particularly Manchester City

SOCIAL SENTIMENT OF FOOTBALL TEAMS

REAL MADRID CF

FREQUENTLY MENTIONED TOPICS		
Topic	Keywords	Key Interest
Player Information and Squad Details	<ul style="list-style-type: none">• <i>"Real Madrid player list"</i>• <i>"Real Madrid players"</i>	<ul style="list-style-type: none">• Current squad• Details about individual players
Ticket Information and Match Attendance	<ul style="list-style-type: none">• <i>"How to buy Real Madrid tickets"</i>• <i>"Real Madrid tickets"</i>	<ul style="list-style-type: none">• How to purchase ticket• Attend matches or tour the stadium
Match Previews, Scores, and Highlights	<ul style="list-style-type: none">• <i>"Real Madrid 1-3 Milan"</i>• <i>"Real Madrid vs Barcelona"</i>• <i>"Real Madrid 0-4 Barcelona"</i>	<ul style="list-style-type: none">• Recent match scores• Upcoming games updates• Rivalries as Barcelona and Milan
Club's Background and Merchandise	<ul style="list-style-type: none">• <i>"Which country is Real Madrid from?"</i>• <i>"Real Madrid souvenirs"</i>	<ul style="list-style-type: none">• Real Madrid's origins• Merchandise for memorabilia
Training and Facilities	<ul style="list-style-type: none">• <i>"Real Madrid training base"</i>	<ul style="list-style-type: none">• Real Madrid's training facilities• Where and how the team prepares
Club Management and Contracts	<ul style="list-style-type: none">• <i>"Real Madrid officially announces Carvajal's contract extension"</i>	<ul style="list-style-type: none">• Contract updates & player retention• Management updates• Changes in leadership

SOCIAL SENTIMENT OF FOOTBALL TEAMS

BARCELONA

FREQUENTLY MENTIONED TOPICS		
Topic	Keywords	Key Interest
Player and Team Information	<ul style="list-style-type: none">• <i>"Player list"</i>• <i>"Lewandowski", "Raphinha", "Pedri", and "Olmo"</i>	<ul style="list-style-type: none">• Player rosters, team line-ups, and individual player performances
Match Schedules and Results	<ul style="list-style-type: none">• <i>"Real Madrid vs Barcelona"</i>	<ul style="list-style-type: none">• Upcoming matches and recent game outcomes.• Especially Barcelona vs Real Madrid
Merchandise and Fan Gear	<ul style="list-style-type: none">• <i>"Jersey"</i>• <i>"Souvenirs"</i>	<ul style="list-style-type: none">• Purchasing official merchandise to support their teams
Live Streaming and Viewing Options	<ul style="list-style-type: none">• <i>"Live streaming"</i>• <i>"Watch online"</i>	<ul style="list-style-type: none">• Watching matches online live
Club News and Updates	<ul style="list-style-type: none">• <i>"Latest news"</i>• <i>"Official club announcements"</i>	<ul style="list-style-type: none">• Stay informed about team news, player transfers, and club activities.
Rivalries and Notable Matches	<ul style="list-style-type: none">• <i>"Real Madrid vs Barcelona"</i>	<ul style="list-style-type: none">• Excitement surrounding big games and rivalries, especially classic match-ups.



CHINESE FOOTBALL MARKET DIGITAL LANDSCAPE

DIGITAL LANDSCAPE

KEY PLATFORM



Live Streaming Platform

For Chinese football fans, watching matches live is a top priority. They frequently use streaming platforms like **PP Sports**, **iQiyi Sports**, **Tencent Sports**, and **Live Ba**, which also offer sports news and highlights. These platforms meet fans' demand for comprehensive sports coverage and real-time updates on their favourite teams.

Discussion Forums

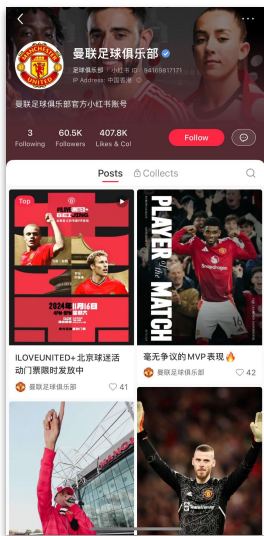
Platforms like **Baidu Tieba**, **Dong Qiu Di**, and **Hu Pu** act as communities where fans can discuss matches, players, and share insights. These forums give fans a more interactive experience, keeping them informed and engaged with the latest information.

Football Games

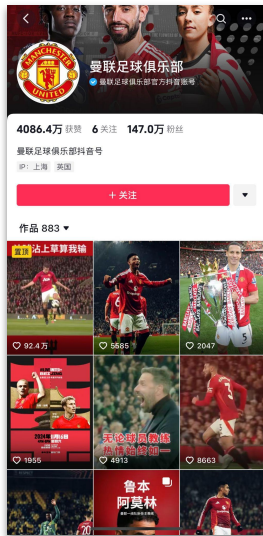
Games like **FIFA Football** and **Live Football** are popular among fans, allowing them to simulate matches and play as their favourite teams or players, enhancing their connection to the sport.

DIGITAL LANDSCAPE

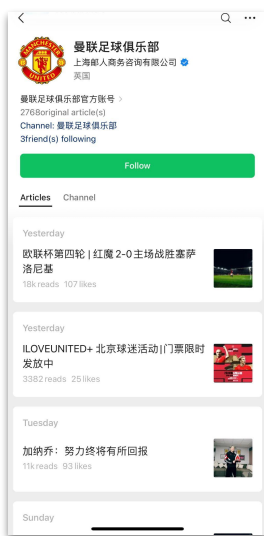
MANCHESTER UNITED - SOCIAL MEDIA



RED



DOUYIN



WECHAT



WEIBO

Manchester United has official accounts on **RED**, **Douyin**, **WeChat**, and **Weibo**.

RED: The account has 60.5k followers and a total engagement of 407.8k. Although RED has hosted events like the "Meet & Greet between Manchester United and Chinese Fans," most fans prefer **Douyin** for updates due to its engaging video content.

Douyin: With 1,47 million followers and 883 video posts, Douyin is a popular platform among fans to catch match highlights and player performances. The video content here keeps fans more engaged and connected with the latest news.

WeChat: Manchester United has published 2,768 original articles on WeChat and typically posts around 15 times per month. This platform is used mainly for in-depth articles and regular updates.

Weibo: With 11,3 million followers and over 42,084 posts, Weibo has the largest following among Manchester United's accounts. As a microblogging platform, it provides timely updates on match results, previews, highlights, and real-time news, meeting fans' need for frequent updates.

DIGITAL LANDSCAPE

MANCHESTER UNITED - LIVE STREAMING



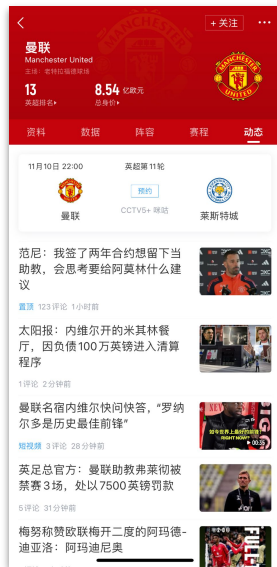
IQIYI SPORTS



TENCENT SPORTS



MIGU VIDEO



LIVE BA

Football Live Streaming Platforms

Popular platforms for streaming football include **iQIYI Sports, Tencent Sports, Migu Video, and Live Ba**. They all provide live match broadcasts, replays, highlights, match schedules, scores, standings, player lineups, and the latest news.

Tencent Sports

This platform offers detailed match analysis for various leagues and seasons, but its live streaming is text-based.

Migu Video and iQIYI Sports

These platforms have similar features, including the option to schedule live video streams.

Live Ba

Live Ba offers the most comprehensive team information, including basic details, historical achievements, and introductions. It also provides visualized statistics, player performance data, match results, and market values. For individual matches, it includes in-depth analysis and visual data presentations.

DIGITAL LANDSCAPE

MANCHESTER UNITED - FORUM



DONG QIU DI



HU PU



BAIDU TIE BA

Fan Forums in China

Forums are popular spaces where fans connect and form groups around shared interests, creating interactive communities. In China, major football-focused forums include **Dong Qiu Di**, **Hu Pu**, and **Baidu Tieba**.

Dong Qiu Di

Dongqiudi is an app dedicated to football, providing news, in-depth analysis, and a space for community engagement.

Hu Pu

Hupu is a community website focused on sports and general topics, with highlights on basketball, soccer, esports, and volleyball. The Manchester United section on Hupu has 388,000 fans and 193,000 posts.

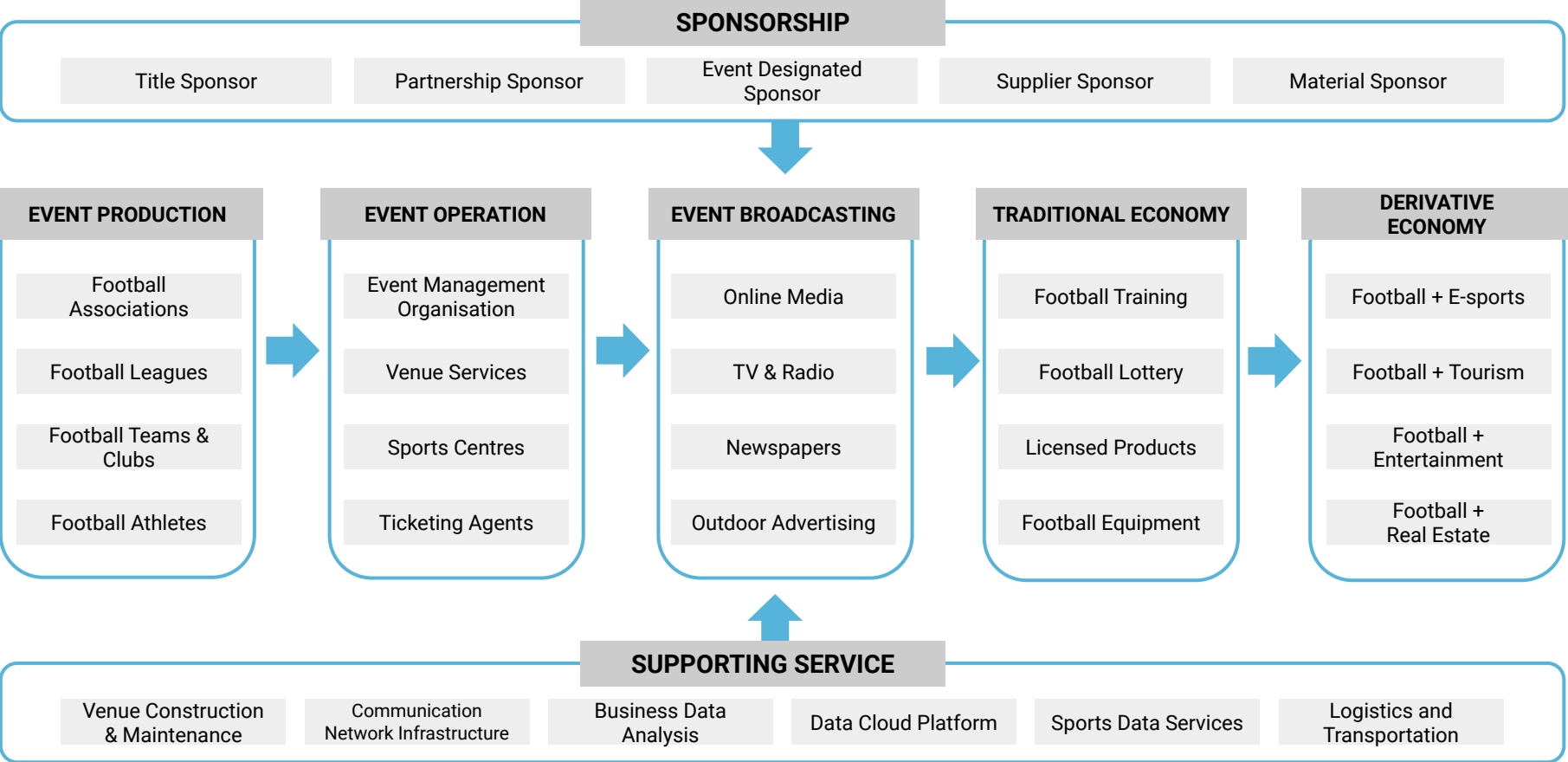
Baidu Tieba

Baidu Tieba, an independent platform under Baidu, is one of the largest Chinese-language communities. It covers topics like society, regions, lifestyle, entertainment, and sports. The Manchester United section on Tieba has a massive following with 5.08 million fans and 116 million posts.



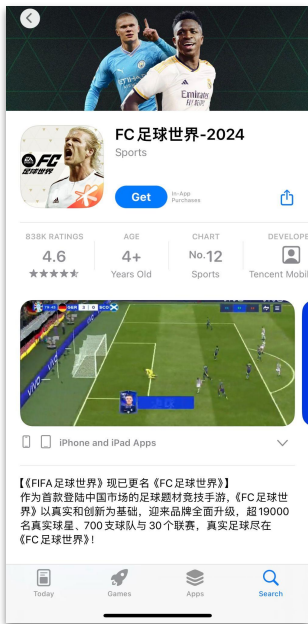
CHINESE FOOTBALL MARKET BUSINESS OPPORTUNITY

CHINESE FOOTBALL MARKET: BUSINESS LANDSCAPE

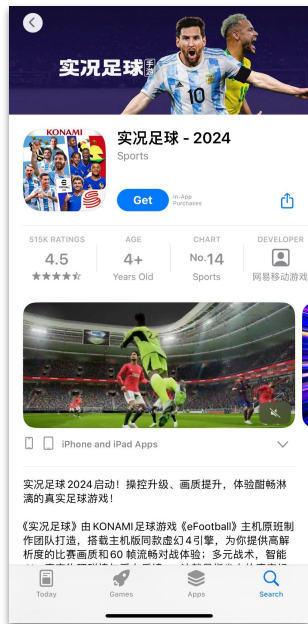


BUSINESS LANDSCAPE

MANCHESTER UNITED - ONLINE GAME



EA SPORTS



PRO EVOLUTION
SOCCER

EA Sports

A key feature of the game "EA Sports" is its extensive licensing, covering real tournaments, national teams, clubs, and star players. The game includes over 19,000 real players, 700 teams, and 30 leagues, providing an authentic football experience. The newly added, officially licensed UEFA Champions League mode offers players the most realistic competition. Player attributes are closely aligned with real-life skills, enhancing realism in gameplay.

Pro Evolution Soccer (PES)

"PES" focuses on balanced and realistic gameplay, which many players find engaging. Its shooting system considers body posture, making it feel more like real soccer. With detailed 3D models for players and environments, PES creates an immersive experience. The game carefully replicates player appearances and movements, providing smooth and natural actions for shooting, passing, and dribbling.

BUSINESS LANDSCAPE

MANCHESTER UNITED - MERCHANDISE



Taobao



Jd.Com



Manchester United Dream Theatre



Physical Store In Macau

E-commerce

Taobao and JD.com offer a variety of official Manchester United merchandise, including jerseys, keychains, posters, figurines, backpacks, and collectible cards. Fans can also find souvenirs and blind boxes featuring football stars. However, there is no flagship Manchester United store on these platforms.

Theme Park

The Manchester United Dream Theatre, the only official venue in China with both an online and physical presence, is located in Qianmen, Beijing. It provides the latest jerseys and merchandise, a museum, exclusive jersey launches, printing services, match tickets, immersive football games, a Manchester United-themed restaurant, and fan events for match viewing.

Physical Stores

Some cities have authorized retail stores that sell official Manchester United merchandise, such as footballs, jerseys, shoes, scarves, and hats. These stores may also offer signed jerseys.

BUSINESS LANDSCAPE

MANCHESTER UNITED - PARTNERSHIPS



Diverse Sponsorships

Manchester United's partners come from various industries, including clothing, football gear, IT services, tires, medical services, wine, logistics, finance, skincare, WiFi providers, gaming, airlines, hotels, coffee, home goods, fashion, software, sports drinks, entertainment, TV networks, banks, wealth management, and travel platforms.

Brand Exposure

These sponsors gain significant visibility through branding on Manchester United's kits, stadiums, and promotional materials. Their brands are regularly seen during matches, on TV, and in online coverage, which boosts their recognition.

Commercial Benefits for Manchester United

Sponsorship deals bring substantial revenue to Manchester United. For instance, the club's partnership with Adidas not only generated high revenue but also increased profits by regaining exclusive store rights and securing deals with other clothing brands.

BUSINESS LANDSCAPE

MANCHESTER UNITED - YOUTH TRAINING PROGRAM



YOUTH TRAINING PROGRAM



YOUTH TRAINING PROGRAM

Manchester United's youth academy began on October 30 1937, when academy players Tom Manley and Jack Wassall played in a match against Fulham. This event marked the start of the club's strong connection to its youth system. Since then, an academy player has featured in every matchday squad for over 85 years—a record in European football.

Strengthening the Academy

These efforts have solidified the academy and ensured the club's long-term success.

Attracting Talent

The club has recruited promising young players like Hannibal, Garnacho, A. Fee, and Jack Fletcher, who have excelled in youth tournaments and contributed to winning titles.

Enhancing Training and Coaching

Since 2019, Manchester United has upgraded its training facilities and coaching staff to attract top talent. This investment has led the youth team to victories in the Youth League Cup and the youth league in 2024.

Identifying 'Wildcard' Players

The club has improved its scouting system, working closely with the first team and focusing on non-EU players to integrate them into the main squad at the right time.

BUSINESS LANDSCAPE

MANCHESTER UNITED - BRAND LICENSING



Manchester United x
MLILY
Legend 7 Mattress



Manchester United x
adidas Originals
adicolor Capsule
Collection



Manchester United x
Balenciaga
2022 FW Collection

Manchester United earns from sponsorships, retail, merchandise sales, apparel, and product licensing.

The club sells branded items like coffee mats and bed sets featuring its logo, available in Manchester United stores, online, and through partners' wholesale channels.

Manchester United also makes revenue from mobile apps and content licensing, offering fans team news, live matches, videos, and other exclusive content. The club collaborates with third parties for content like virtual experiences and football games.



THANK YOU

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