

REPORT ON THE 2017 CHINESE SPORTS SPONSORSHIP MARKET

中国体育赞助市场报告

Emerging sports sponsorship market with great potential
Overview of Chinese sports sponsorship market
Sports sponsorship trends in China over the next 5 years
Advice for overseas brand expansion plans in Chinese market



THE PREMIER SPORTS MARKETING PLATFORM IN CHINA

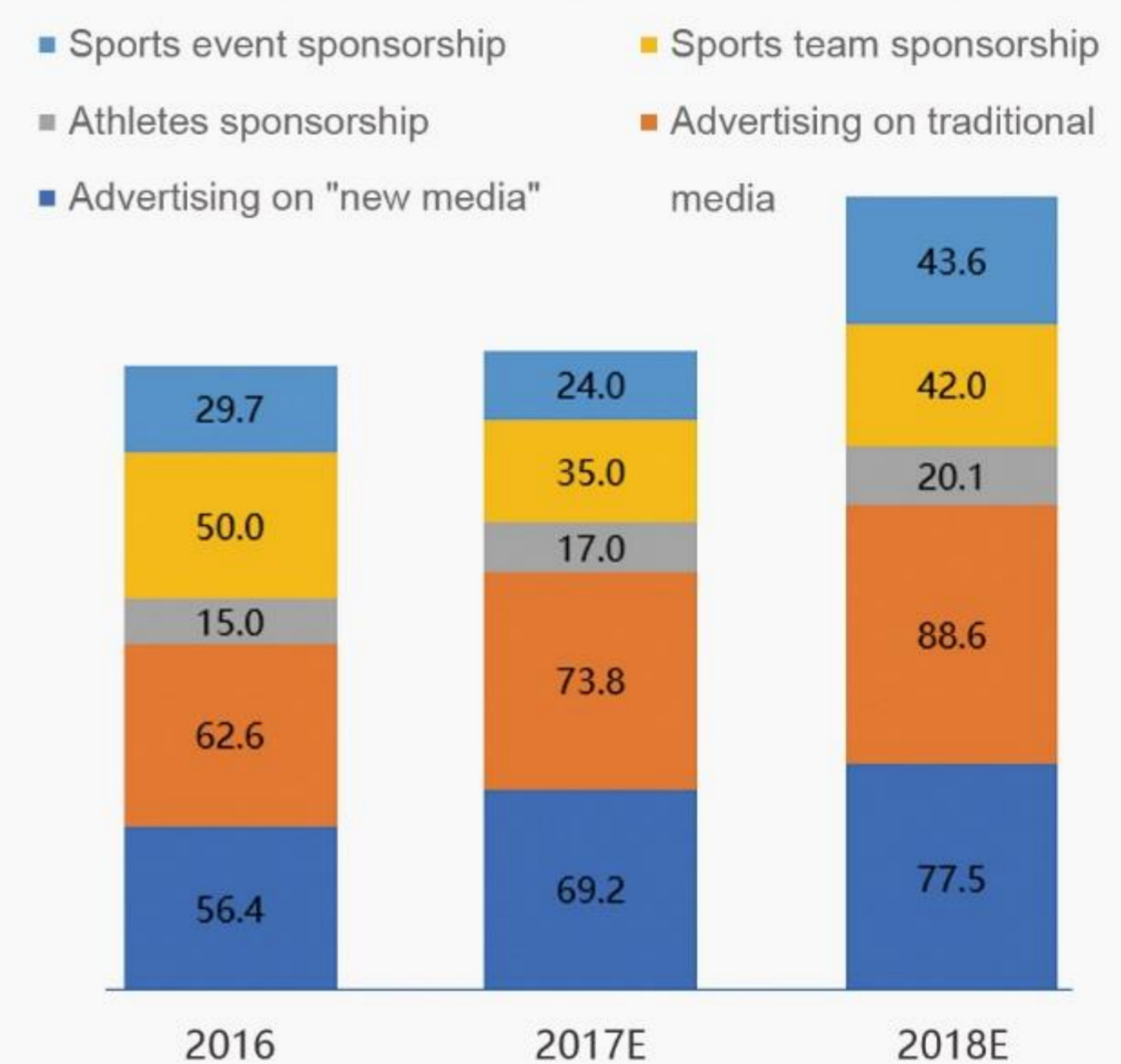


1 EMERGING SPORTS SPONSORSHIP MARKET WITH GREAT POTENTIAL

Sports sponsorship is growing rapidly in China

- The revenue of sports marketing in China keeps growing from 2016 to 2018, while 2018 is widely seen as a tipping point.
- The sponsorship deals signed by the Chinese Olympic Committee (COC) from 2001 to 2004 were worth CNY165.22m (USD26.27m) in total, while those from 2009 to 2016 were worth nearly CNY3bn (USD476.9m) in total.
- Tencent Sports predicts that the revenue from the sports marketing industry in China will be CNY27.18bn (USD4.32bn) in 2018, an increase of 24.1% on 2017 (CNY21.9bn (USD3.48bn)).

China's sports sponsorship industry revenue (2016-2018) (CNY million)



China's sports sponsorship has the capacity for expansion.

- IOC, FIFA and some other reports indicate that the North America sports sponsorship industry revenue (CNY95.94bn (USD15.25bn)) was nearly 7.7 times more than China (CNY12.43bn (USD1.98bn)) in 2015. But the revenue gap of 7.3 times in 2016 and 6.3 times in 2017, shows that the revenue gap between the two markets is narrowing.

Factors boosting the expansion of sports sponsorship in China

- A set of policies regarding sports industry have been launched by the government in recent years.
- More and more Chinese capitals have rushed into the sports industry.
- The new generation in China prefer a healthier lifestyle, accelerating the growth of sports participation and sports consumption in China.
- New technologies, such as AI, VR and AR, not only draw more people's attention to sports events and sports participation, but also brings innovation to sports sponsorship.
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2 OVERVIEW OF CHINESE SPORTS SPONSORSHIP MARKET

Brands

Characteristics of China sports sponsorship market

- Top sports IPs are dominant targets for sponsorship.
- Brands want to go global.
- Brands not only sponsor an event, but also begin to assess the ROI of their sponsorship.
- Media landscape will continue to diversify and the broadcast revolution will continue.
- Winter sports sponsorship market have good potentials.
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Sponsorship properties

- Sports media retains their significance in China – Linear TV and OTT platforms receive massive sports advertisement.
- Domestic professional sports properties have become more appealing to sponsors, having embraced more sponsors and received more sponsorship investment.
- Mass participation sports events, such as marathons, triathlons and cycling races, have seen a gradual growth in their commercial value.
- Chinese domestic athletes and teams are receiving more and more sponsorship deals.
- Winter sports sponsorship is also seeing a rapid growth, benefitting from hosting Beijing 2022.
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- Sponsors are still largely from categories that are traditionally well-associated with sports and sports sponsorship, for example, sportswear, water, energy drinks, transportation, finance and insurance.

Sportswear Brands

Brands	Sponsorships
Anta	Sponsor of the 2022 Beijing Winter Olympics, Chinese Olympic Committee, Chinese winter sports team, Chinese gymnastic team, Chinese weightlifting team, Chinese boxing team; Official Marketing and Merchandising Partner of NBA China; Klay Thompson and Zou Shiming as brand ambassadors.
PEAK	The 2017/18 China Volleyball League, the Dalian International Marathon and Hainan (Sanya) International Marathon; Tony Parker and Dwight Howard as brand ambassadors.
Xtep	International marathon races in Xiamen, Hangzhou and Guangzhou, 2017 International Champions Cup China, and China University Basketball Super League; Xie Zhenye as a brand ambassador
361°	2018 Jakarta Asian Games, 2016 Rio Olympics and QG eSports Club

3 SPORTS SPONSORSHIP TRENDS IN CHINA OVER THE NEXT 5 YEARS

4 ADVICE FOR OVERSEAS BRAND EXPANSION PLANS IN CHINESE MARKET

For the full version of the *Report on the 2017 Chinese Sports Sponsorship Market*, please contact Yutang Sports.

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2017 CCTV 5 ANNUAL VIEWERSHIP REPORT

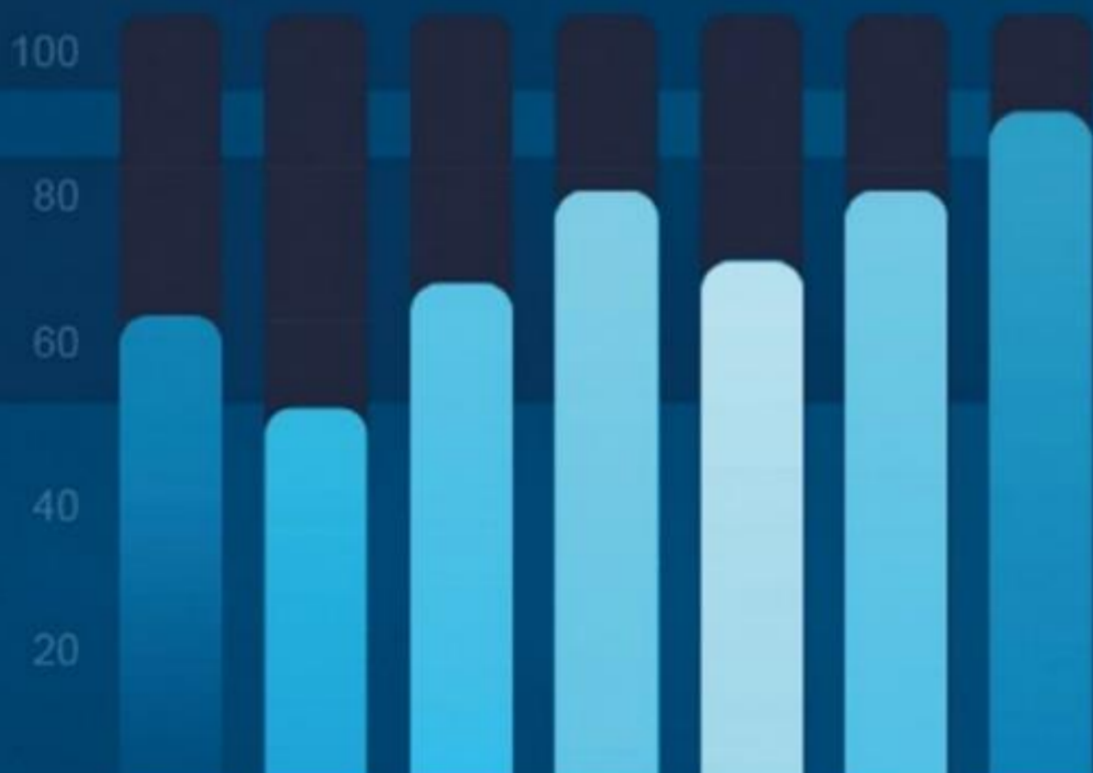


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WEEKLY REPORT

WEEKLY VIEWERSHIP REPORT OF SPORTS EVENTS ON CCTV5



2016/17 NBA CHINESE TV VIEWERSHIP REPORT

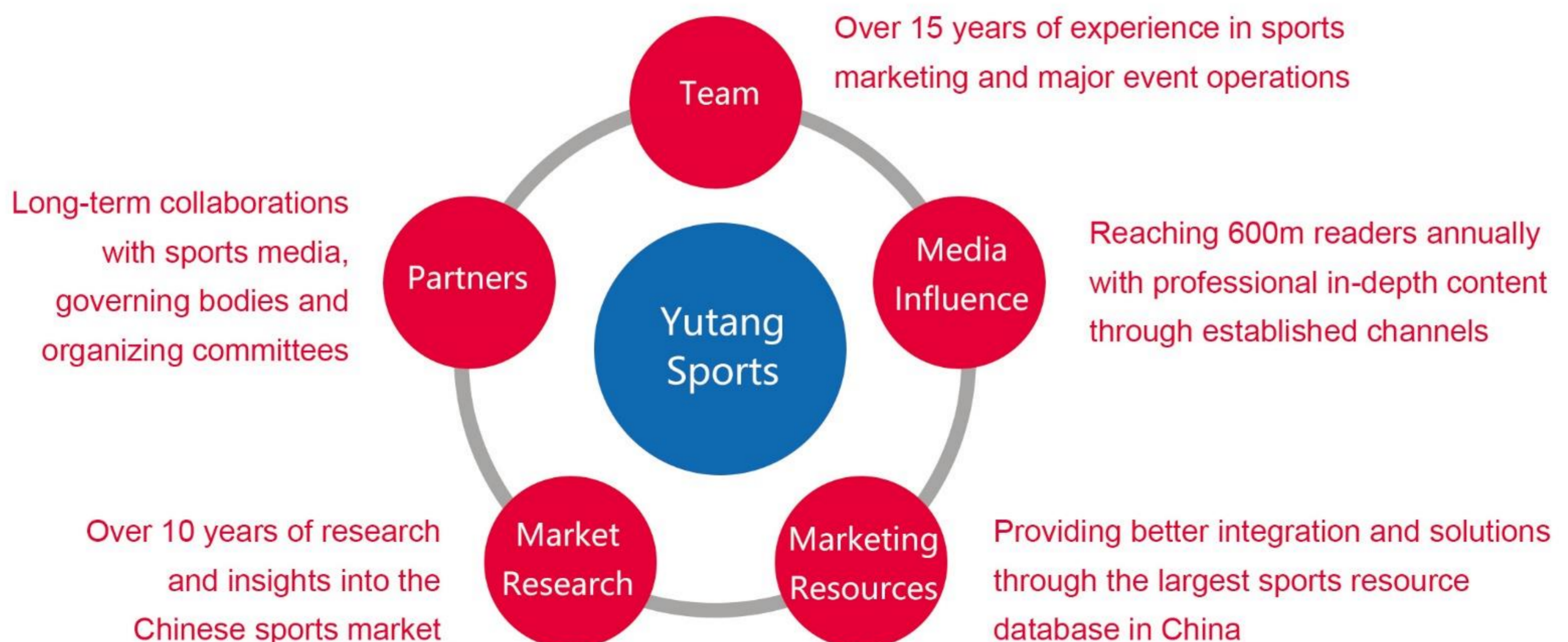


ABOUT YUTANG SPORTS

Yutang Sports-The Premier Sports Marketing Platform in China—Your best partner to work with to embrace the Chinese market.



- Yutang Sports is an internet-based sports marketing service provider, aiming to create a sports marketing platform which combines whole industry chain services, provides all-round marketing solutions for brands, rights holders and other institutions and promotes the healthy development of the sports industry.
- Yutang Sports, focusing on industries, business and marketing, is the largest vertical sports marketing media outlet in China. We provide the most up-to-date sports business news, useful analysis and exclusive data reports on the sports industry in both Chinese and English. We provide a space for idea exchanges between China and the rest of the world.
- We have amassed more than 500 sports sponsorship projects on our sponsorship platform, including multi-sport events, soccer, basketball, volleyball, billiards, tennis, winter sports, table tennis, track and field, cycling, boxing and motorsports. We have brokered sponsorship deals for dozens of brands such as K-boxing, Wuliangye, Zima Caihang, qy8, Royally, RARONE, Shudayuan, Ganten, C'estbon, Mulene, Kunlun Mountain Mineral Water, Meizu, Shenzhou Zhuanche, Porsche and Uincall.





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