

Sports Satisfies
People's Desire for

Freedom

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Measurements for freedom are largely external and materialized. Pressure from work and family has created momentum among young people to escape the familiar environment in order to avoid commands and judgments. Freelancing and traveling are two common exit strategies.

Executive Summary

- A multi-option sports strategy should be extended to every aspect of Chinese consumers' life, including travelling, school, and family life scenes to maximize their right of freedom.
- Stress-relief, easy access, and specialized services are key in turning sports into the instinctive go-to for people to achieve temporary freedom.
- Consumers are starting to realize excessive possession hinders a simple life. Brands can bring extra values to their products by introducing multi-functional products.



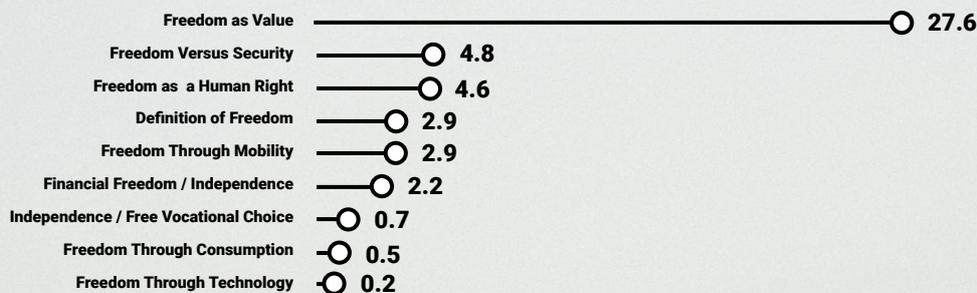
Sports Offers Freedom in an Otherwise Routine Life

Sports and travel are two major hobbies among China's young generation: sports stand out even more because it's relatively cheaper and less limited by time and space. Being overwhelmed by always being told what to do at work and constant family pressures, young Chinese can execute their free will in choosing a sports category or event they feel most comfortable and confident about. 27.6% of the discussions on social media under "Freedom" talk about how important it is as a value (Chinese Consumer Value Index 2019, Trendbüro). Dance studios or gyms that offer a variety of unlimited classes ranging from Muay Thai to Broadway dancing are the more preferred packages that young Chinese are willing to pay for rather than annual subscriptions to a single type of courses or mere usage of facilities.

1 VALUE FREEDOM: DETAILED CONTENT OF POSTS

By far the most postings about freedom emphasize it as being a value. Some posts focus on the sometimes difficult relationship of freedom and security, some on freedom as being a human right. Aspects of achieving feelings of freedom (by mobility, financial situation, vocational choice) are less often.

Basic direction of freedom



Unit: Percent

Source: Chinese Consumer Value Index 2019 (Trendbüro, 2019)

As for the consumption habit of travelling, which is closely related to "breaking free" from daily routines, more and more people are no longer satisfied with simply taking pictures in front of scenic spots. Data released by Caissa Touristic shows that in the first half year of 2017, consumers of sports tourism exceeded 15% of all tourists and are still growing at the rate of 30-40% annually. Consumers want to feel even more free by watching and supporting their favorite sports teams or athletes at international games by travelling to another country. It has also become a fairly common phenomenon for people to travel to another city/country

country to participate in a marathon in order to feel a deeper connection with the destination. According to iiMedia Research, from 2016 to 2018, the volume of marathon held in China increased by more than 90%. Although even third- or fourth-tier cities have also started to host marathons, there are a couple of famous host cities such as Xiamen and Wuxi, which never fail to attract runners from all over China.

Best Practices



Xtep has been sponsoring Xiamen Marathon successively for 11 years, making it the king of marathon marketing in China's sports industry. Along the way, it forged many IPs such as "lover marathon", "music marathon" and "family marathon" etc., among which more than two-thirds of the participants are from outside Xiamen. According to International Association of Athletics Federations, Xiamen Marathon ranks as No. 1 in China and the 8th in the world in 2019.



Adidas as the 2019 sponsor for China University Football Association, together with Ali Sports created a Campus Day where the presence of celebrities such as David Beckham and Zinedine Zidane caused great sensation in Chinese at universities. Under the slogan "It's My Showtime", every university student was granted the freedom of picking their role in this event: player, reporter, volunteer, cheerleader, and enthusiastic audience. Besides the professional games, students also participated in experiential and interactive sports games, which converted into great online sales for Adidas.

Business
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SPORTS BRANDS SHOULD NOT TELL CONSUMERS WHAT TO DO. INSTEAD, THEY SHOULD OFFER ABUNDANT CHOICES AND INSPIRATIONS TO GIVE SPORTS ENTHUSIASTS THE FREEDOM THEY MISS IN OTHER AREAS OF THEIR LIVES.

As city dwellers grow more enthusiastic towards a simple life, sports brands need to be part of the solution rather than problem. One approach could raise from developing multifunctional products or minimizing the sense of idle existence, such as multi-function home strength training equipment. The added value can be injected via soft approaches.

Sports as a Venting Channel for Daily Pressure

Pressure Report on Urbanites in China 2019 by CBNweekly shows that 30.24% of the interviewees feel stressed a couple of times a day, and 43.3% believe that the pressure they are under has exceeded the bearable level. The intrusive working hours of 996 (9 a.m. to 9 p.m., 6 days a week), often-times implied, deprived Chinese consumers' due leisure time. Doing sports can give them the utmost positive usage of their limited free time instead of being glued to their phone or bed. With the support of national policies and local communities, more and more options spring up for ordinary to be available for ordinary Chinese people in order to escape temporarily from parents, spouses, school, and work. The list includes sports shopping malls, game rooms inspired by sports reality shows, and more.

According to 36 Kr, in cities like Shenzhen, where the "night economy" is well-developed like Shenzhen, more than 70% of the gym-goers choose to work out at night. Specialized models of female-only gyms and family-time workout containers all found their niche to distinguish themselves in the market and cater to the need of a "small" mass. Those who can only exercise after work naturally prefer slightly more intensive and aggressive sports categories to theoretical teachings of techniques. Having been exhausted from work, they need an outlet for stress and a comfortable environment where they can talk to other members at ease. This has become a trendy lifestyle in first-tier cities. Even outdoor venues such as football fields and basketball court tend to thrive after 6 p.m., according to journalists from Guangzhou Daily.

Best Practices



Wanba is a startup with the business model of 24/7 gym container sharing that is focused on parent-child activities: within 50 meters of the users' residence, the 7.5-square-meter container is divided into regular workout areas for adults and kids, the latter of which is equipped with climbing poles and mini basketball hoop etc. With the rate about 1.5 euros/hour, Wanba's main revenue comes from ads and sales of the products installed in the container such as sports speakers.



SuperModelFit in Shanghai and **GirlFitness** in Beijing are both addressing the long list of pain points female gym-goers have: annoying pick-ups, sweaty air and poor hygienic conditions, and lack of different facilities catering to female-specific intentions. After a long day of work, they need a space of privacy and tranquility to work out.



"Player No.7" sports-themed street blocks inside a mall (Suzhou) is a successful attempt to bring the sports dynamics into traditional points of consumption – the shopping mall. Events such as boxing, fencing, archery, and electronic sports all in one stop offered an unprecedented experience for weekend getaways and family quality time.

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THE SPORTS MARKET IN CHINA IS BECOMING MORE AND MORE FRAGMENTED AND SPECIALIZED IN TERMS OF HELPING DIFFERENT CONSUMERS ESCAPE FROM AND RELIEVE DAILY PRESSURES.

With increasingly stressful working schedules, younger Chinese consumers are in desperate need of easily accessible and affordable sports solutions that can make the best out of their free time. Late-night workout, community facilities, and gender/age-specific content are all aspects sports companies can build the distinctive features on.

Long-term Cultivation of Self-disciplined Freedom via Sports

A well-known slogan by KEEP is “Self-discipline gives me freedom”. For most Chinese consumers, financial independence is the major life accomplishment in terms of freedom, and on top of that, as early in life as possible. However, more and more news about the sudden deaths of young office workers induced by intense work, lack of sleep and unhealthy eating habits have triggered large-scale discussion of “financial freedom” v.s. “staying alive and healthy”. The huge momentum of the sport industry lies just in the alternative offering of freedom: equipping themselves with a healthy physical and mental condition so as to live an active lifestyle.

Mountaineering has become a new career advancement training for entrepreneurs in China—many household names in the business world all expressed their obsession and passion for mountaineering on social media or in their autobiographies. It not only fits the entrepreneur spirit of constantly challenging themselves outside the comfort zone, but also is a great practice of team spirit and leadership training in front of harsh environment and limited conditions. The networking feature of joining an entrepreneur trekking group is also a big factor as it helps to build stronger connections with their peers by revealing personalities and qualities in difficult circumstances. According to *2018 Chinese Consumer Insight Report* by Accenture, the higher the income is, the higher the proportion of people doing sports for more than five hours per week. When the average monthly salary reaches 12,000 RMB (1529 Euros), the ratio is almost 50%.

Best Practices



When KEEP's user volume reached 30 million, they collaborated with a creative studio KARMA and produced a TVC under the theme "self-discipline gives me freedom". Shortly after it was launched to multiple media platforms such as the metro boards, it boosted KEEP's user base to 50 million and received 84 million clicks on social media platform Sina Weibo.



Deriving from the close connection between entrepreneurship and sportsmanship, People's Daily Online organized the "Entrepreneurship in Sports" Forum. While the host conducted a fireside chat with successful business people who also made milestones in sports like hiking and mountaineering, the message delivered was the introspective role of outdoor sports in changing people's lifestyle and company philosophy.



Adidas' Chinese brand ambassador (since 2016)—Ning Chang is an actress known for her lifelong passion in sports and worshipped by fans for looking like 18 at the age of 37 through the magic of sports. Compared to the traditional marketing mentality of hiring whichever celebrities are most popular at the time, this is a strategy that aims to forge sustainability in both brand image and in helping brand fans follow the role model of long-term sports passion.

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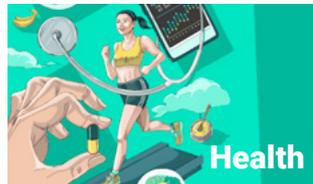
SPORTS IS A MUST-HAVE ELEMENT IN PEOPLE'S LONG-TERM PURSUIT OF A BALANCED AND FREE LIFESTYLE, ESPECIALLY FOR ENTREPRENEURS IN CHINA.

Entrepreneur communities are one of the most thriving scenes in China, the members of which align perfectly with the sports spirit and activities. It is a huge market to cater to considering their demand for both self-discipline cultivation and social connection maintenance.

Six More Chinese Values that are Relevant for Your Business in China.



Simplicity



Health



Nature



Community



Success



Recognition

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The 7-part whitepaper series *Chinese Sports Consumer Values* builds on Trendbüro's *Chinese Consumer Value Index 2019* – the first-ever quantitative and qualitative analysis of Chinese consumer values, based on 7.7 million user-generated posts from Sina Weibo and WeChat. An international team of researchers applied the CCVI's findings to the Chinese sports and outdoor industry, complete with best practice examples and business implications.

Pictures: The images shown are pictures from companies were selected as best practices, otherwise sketch illustrations were created to underline the context of the values.