



# THE FUTURE OF **SPORTING PARTNERSHIPS IN ASIA**

## **WHAT WILL MATTER IN 2022?**

Reflections and opportunities  
from CSM Asia



# INTRODUCTION

As we enter a new year, we thought it timely to reflect on what our industry achieved in 2021, the challenges and the shifts. How we've all had to evolve and find new ways to bring sport and entertainment to consumers when they need it most. This isn't a report on the impact of Covid, but more an opportunity to highlight some of the key trends and developments that continue to innovate and shape the future of our industry.

As a global sports and entertainment marketing agency, CSM provide 360 solutions to brands and rightsholders, enabling them to leverage the power of partnerships to drive their brand and business objectives. Given our network both globally and locally in Asia, the CSM team have taken the time to review and analyse the topics that matter most to consumers across the region.

The CSM team have honed in on four key topics that are fundamentally changing how businesses and marketing functions operate.

Mental health, diversity and inclusion, digital innovation and sustainability should be strategic priorities for businesses in 2022 and beyond. By forging purpose-led partnerships, Brands and Rightsholders have the unique ability to appeal to consumers in a relatable and meaningful way, and to align themselves with the topics that people care about now and in the future.



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# 01.

## A SUSTAINABLE FUTURE FOR PARTNERSHIPS



**SEBASTIAN PAGE,**  
**SENIOR ACCOUNT DIRECTOR**

With sustainability and climate change at the top of the agenda following the COP26 conference, brands are coming under more pressure to do their part in creating a sustainable future. Finding a legitimate and authentic way to do this is always a challenge, so can sports and partnerships be the vehicle brands use to achieve this?

Sky's partnership last year with Tottenham Hotspur to stage the world's first major net-zero-carbon football game was an example of how this can work but will this prove to be just a short-term trend while this subject is on the agenda, or will it be a long-term shift of brands using the power of sport to drive real impact and change as we enter 2022 and beyond.

Brands, rights holders, and agencies are all taking huge steps to improve their sustainability policies and practises. Not only is this the right thing to do for the planet, but it is also what people want to see.



There has been a post-Covid values and lifestyles shift which has fired a real desire to become more sustainable. A recent Regeneration Rising Study by Wunderman Thompson, found that **86% of people globally expect businesses to play their part in solving big issues** like climate change or what is seen as social justice. A further **82% feel that companies should put people and the planet before profits.**

On top of what consumers actively want to see, there is a genuine opportunity here too. According to Nielsen Sports' latest report: The Changing Value of Sponsorship, **rights holders with a sustainability agenda can potentially grow their revenues by as much as 10%** over the next three-to-five years compared with those who lack the same focus.

This isn't going unnoticed in our industry. We've seen Formula One pledge to be carbon neutral by 2030 and World Sailing commit to 56 different targets by 2030 that range from water quality to single use plastic goals to support ocean conservation on a global scale.

The sustainability agenda is especially relevant for a market like Asia and is beginning to be a leading conversation here too, especially with the Tokyo 2021 Summer Olympics and Beijing 2022 Winter Olympics taking place in the region. In May of last year, the Beijing Organising Committee for the 2022 Olympic and Paralympic Winter Games released an official Sustainability Plan which highlighted three key themes of “positive environmental impact”, “new development for the region and “better life for the people”.

In a region that is sometimes considered behind the curve when it comes to action in terms of sustainability, partnerships present an ideal opportunity for brands to make a positive change, especially now the pressure is on them.

There is also a huge opportunity closer to home with Hong Kong’s Kai Tak Sports Park expected to be completed in 2023. This could be

a turning point for the city’s future if built with sustainability at its core. Kai Tak can provide Hong Kong with a tangible example of how sport and entertainment can provide a powerful platform in changing perception and for brands to align with its sustainable impact within the Hong Kong community.

We have reached a point where action is not only beneficial but a necessity. Sports and organisations have their part to play in this future, as their global reach and influence can make genuine impact. Brands and rightsholders have the immediate opportunity to use partnerships to promote their sustainability agendas. It’s a tangible and efficient way to complement what is being done across sustainable supply chains for example, but through a lens that appeals to their consumers in a relatable and interesting way.

***As one of the world’s largest sports and entertainment infrastructure projects of its kind, Kai Tak Sports Park has a crucial responsibility to create positive change by influencing how people feel and behave around sustainability. A wide range of sustainable features and initiatives have already been incorporated into the Park’s design, which would also reflect ASM Global’s (Precinct Operator) new corporate social responsibility platform, ‘ASM Global Acts’, focused on investing in people, protecting the environment and strengthening our communities.***

**JAMES IRVINE,  
GENERAL MANAGER  
COMMERCIAL, KAI TAK  
SPORTS PARK**

## PROPERTY SPOTLIGHT

# SAIL GP

SailGP is adrenaline-fueled racing as eight teams go head-to-head in iconic venues across the globe for a winner-takes-all \$1 million prize. Fuelled by the world's best athletes, SailGP aims to accelerate the transition to clean energy and be the **world's most sustainable and purpose-driven global sports and entertainment platform.**

As **Pioneers of Change**, SailGP works has a team of change makers and partners that exist to push boundaries with a rich history of innovation.



**RACING FOR  
A BETTER  
FUTURE  
CHAMPIONING  
A WORLD  
POWERED BY  
NATURE**





## COMPETITION

World's fastest racing machines piloted by Olympic athletes from national teams including USA, GBR, FRA, ESP, DEN, NZL, JPN, CHF, CAN & AUS



## EVENTS

Intense rivalries and dramatic racing create adrenaline fuelled, carbon zero event experiences from San Francisco to Saint Tropez, New York to Sydney

# A WORLD CLASS PLATFORM

CAPTURING THE ATTENTION OF LEADERS & OPINION FORMERS AROUND THE WORLD



## CONTENT

Compelling storytelling from live broadcast to docu-series that commands attention of opinion formers, influencers and decision makers from around the world



## SAILGP TECHNOLOGIES

A sustainable innovation lab that develops state of the art, high performance racing machines and showcases latest clean technology



## KEY PILLARS:

TECHNOLOGY  
INNOVATION  
SUSTAINABILITY  
ICONIC GLOBAL DESTINATIONS  
ENTERTAINMENT

**779M** DEDICATED AND SECONDARY  
BROADCAST AUDIENCE **SEASON 2**

**72%** INCREASE IN DEDICATED  
BROADCAST **FROM SEASON 1 TO 2**

**54%** INCREASE IN SOCIAL MEDIA  
ENGAGEMENT **FROM SEASON 1 TO 2**

**191** BROADCAST TERRITORIES  
GLOBALLY

**133,244** SPECTATORS **SEASON 1**

**\$115M** TOTAL ECONOMIC  
IMPACT **SEASON 1**

# 02.

## A NEW ERA FOR WOMEN'S SPORT



**MARTINI IP,**  
**SENIOR ACCOUNT DIRECTOR**

The debate around gender inequality in sport is not new. Globally, **women make up 40% of participants in all sport** but receive only 4% of sport media coverage. Men make 15% to 100% more than female athletes across all sport, and pay disparity is significantly unequal in team sports such as basketball and football.

Closing the gender gap has become increasingly important to businesses because it's what their consumers and fans are demanding. Covid-19 came at an unfortunate time, just as women's sport was gaining considerable momentum across the globe. The pandemic deprioritised women's sport, with rightsholders and broadcasters prioritising the most profitable sports and events during a tough period for the sports landscape. Nevertheless, we are confident that there is a strong need and want to re-establish growth in women's sport as normality around the world slowly resumes.

\*United Nations Educational, Scientific and Cultural Organisation, Ivanhoe Newswire

2022 will mark a new era for women's sport. One where women's sports are arguably some of the most compelling partnership opportunities out there. Providing valuable audiences, innovative rightsholders, future global icons and storytellers, compelling narratives and great value for money. A recent Nielsen survey indicated that **more than 80% of sport fans are interested in women's sport** and of those, 51% are male.

The increased popularity can be attributed to increased broadcast and media accessibility, greater investment and focus from rightsholders and sponsors as well as a demand from athletes and fans. Women's sport is ripe for greater monetization and according to the Women's Sports Trust, it could generate more than £1bn per year by 2030. There are several players in our industry who have fundamentally helped drive this shift and made women's sport more accessible and appealing on a global scale. A notable player is the WTA (Women's Tennis Association).





The WTA's innovation and investment in women's tennis has led to female athletes such as Emma Raducanu and Naomi Osaka becoming champions, but also global icons that transcend sport. Their appeal draws mass, gender balanced audiences and as a rightsholder, the WTA have capitalised on this success to ensure the sustainable growth of women's tennis across all key markets. Their 'Future Stars' programme is shaping the new era at all levels and provides tangible opportunities for sponsors to align their brand values and promote their D&I agenda through the power of partnerships.

Should the WTA continue their investment in Asia Pacific, and find positive resolution from current challenges, they will be a driving force in women's sport in the region and one that brands should keep high on their sponsorship agenda.

As we look forward, rugby and football are also set to drive a new era for women's sport in Asia Pacific specifically, thanks to the Women's Rugby World Cup in 2022 and the FIFA Women's World Cup in 2023 taking place in Oceania for the very first time.

The potential of strong commercial returns has led FIFA to expand the World Cup from 24 to 32 teams, double its prize money to US\$60 million and the investment in women's football in the next four years to US\$500 million. Major events and rightsholders are listening and reacting to fan behaviour, aligning with sponsor led values and choosing to invest in a new era for women's sport.

The new era, however, will require a combined effort from rightsholders, athletes, brands, broadcasters and fans. It should include more equal prize money, broadcast deals, grassroots programmes and innovative data led strategies that show the true potential of women's sport. At CSM, we have defined 7 roles as part of our Women in Sport Strategy, that businesses can play to help shape this new era in women's sport (see next page).





- THE EQUALISER**  
Encouraging gender parity in sports they support
- THE CAMPAIGNER**  
Making a purposeful statement bigger than sport itself
- THE CHAMPION**  
Supercharging engagement with elite women's sport
- THE INSPIRER**  
Empowering women to participate in sport
- THE PUNDIT**  
Talking about sport as sport, not women's sport
- THE BIZ LEADER**  
Using women's sport to help tackle a business challenge
- THE VISIONARY**  
Innovating to shape and transform the future of a sport

# 03.

## INNOVATION DRIVEN BY CRYPTO BRANDS



**JESS LEWIS,**  
ACCOUNT DIRECTOR



**ALLEN SU,**  
ACCOUNT EXECUTIVE

Sports sponsorship continues to be a lucrative market. The global sports sponsorship market was worth an estimated \$57 billion USD in 2020 and is expected to grow to almost \$90 billion USD by 2027.

The financial services, technology and automotive industries are synonymous with some of the largest sporting sponsors globally. For example, Mastercard's sponsorship of the UEFA Champions League costs the card company \$55m USD a year, whilst Emirates' shirt sponsorship deal with Arsenal is believed to be in excess of £200m.

However, with the release of state-of-the-art technology bringing new dynamics to the financial industry and a flurry of fresh investment, we are beginning to see a wave of new competitors in the market for coveted sporting sponsorships.

The cryptocurrency market has seen a boom in popularity in the past two years, spurred by the growth of digital in a post-pandemic world. With this we have witnessed a wave of high profile, record-breaking sporting partnerships announced in the last 12 months, demonstrating the appetite for tech-first industries to tap into the digital-savvy consumer, particularly Gen Z-ers and young millennials.

Amongst a multitude of desirable sporting territories, esports is proving to be an interesting partnership proposition for crypto brands and valuable in targeting highly engaged, affluent, mass audiences. Cryptocurrency exchange platform FTX recently brokered a 10-year \$210m USD deal with US based team, Team SoloMid (TSM) which was the largest sponsorship deal in esports history; making it no surprise that Esports Insider named 2021 the 'year of the blockchain in esports'.





As cryptocurrency desires to go mass-market, several crypto platforms are fighting for an advantageous slice of the fast-growing esports industry. Crypto exchanges are capitalising on these partnerships to provide unique opportunities to their fanbases; as seen by Hong Kong-based exchange platform Crypto.com which offers fans of its latest partner, UK-based esports team Fnatic, financial literacy and crypto education opportunities for those that are new to cryptocurrencies and NFTs.

The success of these new found relationships can also be attributed to the fact that esports properties recognise the value in the ability of blockchain technology to enhance fan interaction and revolutionise existing revenue models. The world's biggest bitcoin exchange, Binance, utilised its partnership with esports team OG to launch its NFT marketplace. This enabled gamers to use their own native currencies within games to generate and collect NFTs which could be re-used or sold later, allowing OG to play a lead role in disruptive innovations within the gaming industry.

Esports is not the only sport to wake up to this revolutionary tech. We've seen huge deals across the football, basketball, and motorsport sectors. Earlier this year, Binance announced a multi-year sponsorship with Italian football team, S.S Lazio. Binance launched a LAZIO Fan Token which unlocked never-seen-before opportunities, such as deciding what message is inscribed on the captain's armband, and allowing fans to partake in voting sessions which influence club decisions.

As the cryptocurrency sector continues to advance into a variety of sporting sponsorship fields, long-standing, traditional organisations can expect to see increasing competition for a slice of the sponsorship pie. The rise in crypto sponsorships will no doubt have a knock-on effect on the traditional sponsorship model, with more digitally-focused, innovative strategies being devised with rightsholders to connect with younger, tech-savvy audiences in new ways.



PROPERTY SPOTLIGHT

# TALON ESPORTS

**Talon** is a professional Esports organisation based in Hong Kong with teams competing across the Asia Pacific, including Thailand, Philippines, and South Korea. It competes in many top-level professional esports game titles, including **League of Legends**, **Dota 2**, **Arena of Valor**, **Rainbow Six Siege**, **Street Fighter V**, **Tekken 7** and **Overwatch** titles.

Talon aims to create the leading, Pan-Asian Esports Platform by providing a platform for game publishers, sponsors, players and fans alike to experience and compete in best-in-class competition and events.

**More than just gaming**, Talon works to deliver value to fans in all aspects of their lives. Whether it's through competitive success, or engaging content or merchandise, Talon looks to connect with fan ideals – forming a truly unique lifestyle brand.



# TALON ESPORTS LINE UP



## TALON

IPODPRO [MID] / HAPPY [JG] / EREZ [ADL]  
NTNZ [DSL] / LINKOU [COACH] / MOOP [SUB] / TONY [SUP]



### TALON IN NUMBERS:

**32** CHAMPIONSHIPS

**37M** WATCHED HOURS ACROSS ALL GAME TITLES

**13M** FOLLOWERS ACROSS ALL SOCIAL MEDIA

**\$38M** MEDIA VALUE GENERATED N 12 MONTHS

### OUR FANS ARE:



**85%** MALE

**86%** AGED 18-35

**\$\$\$** AFFLUENT FANS



# 04.

## POWER OF THE ATHLETE IN CHALLENGING MINDSETS



**MATTHEW TSANG,**  
**ACCOUNT MANAGER**

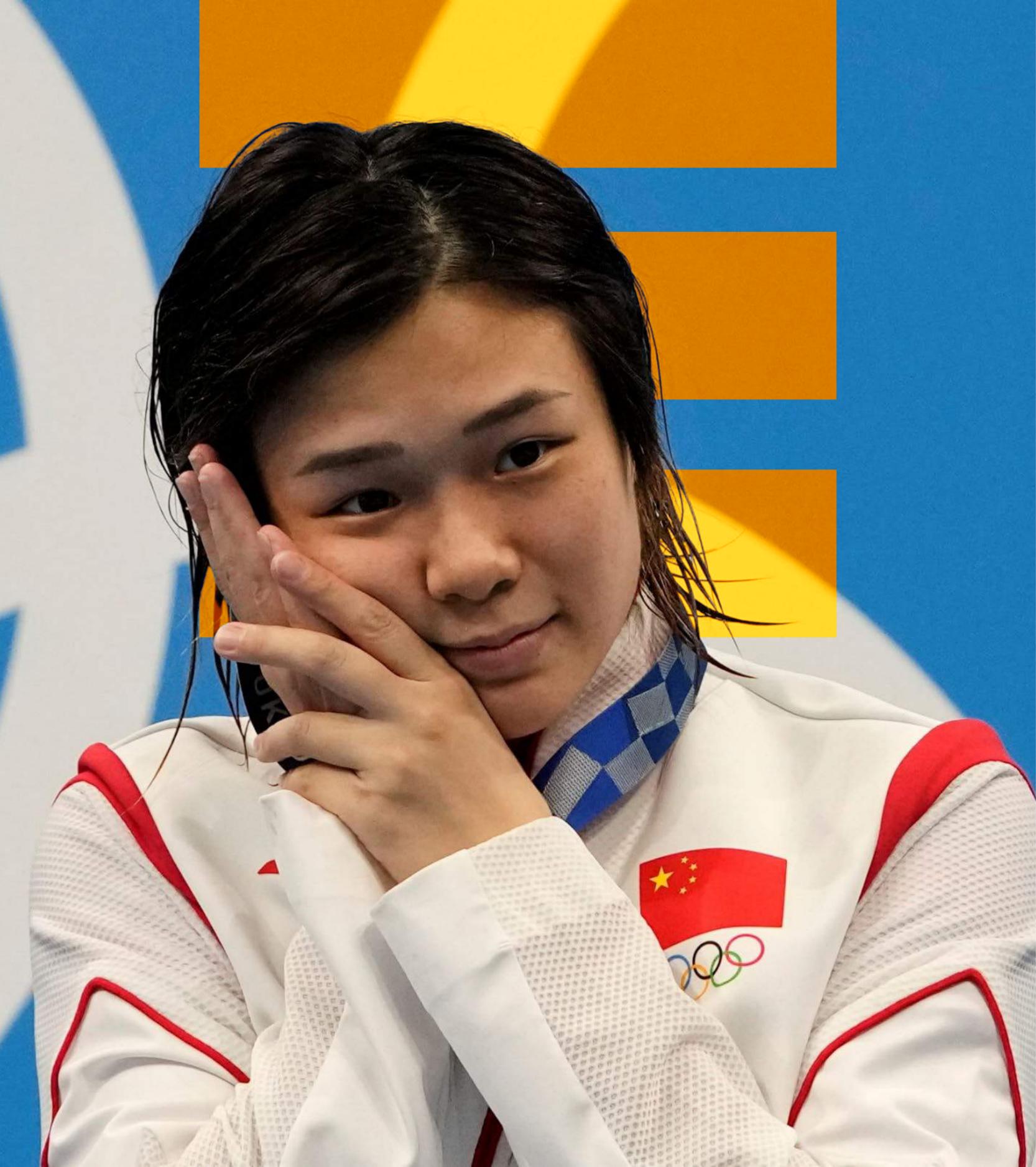
2020 shone a spotlight on mental health given the ramifications of the global pandemic. The topic has been given a lot of valid air-time over the last two years, with organisations around the world stepping up with greater measures to address the issue for their employees and consumers.

The sporting events which unfolded in 2021 made further waves in normalising pressure and struggles on a global scale. Athletes such as Naomi Osaka and Simone Biles took centre stage as they bravely spoke about their mental health struggles, controversially withdrawing from the much-anticipated French Open and Tokyo Olympics competitions they were due to compete in. Despite having to meet the world's expectations to perform at the highest level, these elite athletes prioritised their own health and demonstrated it was "OK to not be OK". What was perhaps once seen as a sign of weakness, is now being viewed as a symbol of strength. The refreshing honesty of Osaka and Biles came at a time when audiences needed it most.

And it is these humanising, personal experiences and stories which are making a tremendous impact given their relatability to the everyday person and struggles that are faced. The decisions by these well-known athletes were followed and supported by many all over the world, and showcased the power of sport and athletes in being able to drive true social change.

From a sponsor perspective, this has also made these athletes even more valuable and authentic spokespeople for brands. More and more, consumers are wanting brands who are trustworthy, genuine, and care about the wider world. Edelman's 2021 Trust Barometer indicates that **86% of people feel leaders of business must lead on societal issues**. By being supportive of these prominent voices and their struggles, brands are able to amplify their shared beliefs and shift the needle on a larger scale. By humanising the sponsor-athlete relationship, and broadening the subject matter outside sport, brands are able to connect on a more meaningful level with their audiences.





We have seen athletes from the US, UK become more comfortable with showing their vulnerability. And there is no doubt the actions from Osaka and Biles will continue to have a ripple effect amongst athletes as we move forward.

Interestingly following Biles' withdrawal from the Olympics, she was joined by gold medallists Shi Tingmao from China and Ki Bo-bae from Korea who openly discussed their need to take care of their mental state. This was a big step for Asian athletes, coming from a place where the stigma around mental health is still prevalent.

Culturally speaking in Asia, career success and economic wellbeing are typically seen as the primary pursuits to happiness, with everything else being secondary or unimportant. However over 50% of global suicides come from Asia and many are overworked and stressed, drawing more attention to the need for this to be addressed. Whilst it remains a sensitive topic however, the narrative is gradually shifting in the region. **71% of Asian consumers today associate mental health with overall health**, demonstrating the recognition of its importance and changing attitudes.

\*The Future of Wellbeing in Asia, Trend Watching, 2020

**90% of consumers in APAC believe brands should be involved in social issues** and lead the charge on facing problems in the world today. This signals a huge opportunity for brands, particularly in Asia, to re-look at how they are approaching their existing or new sponsorship relationships. Sponsor benefits such as event tickets, meet-and-greets, and logo placement still have a place, but Asian brands must look deeper into building real, authentic human connections with the talent in which they partner with as consumer expectations are changing and so should theirs.

Current regional attitudes are deeply embedded in culture therefore change will take bravery, persistence, and won't happen overnight. By building relationships with the right athletes and sports, brands in Asia have the opportunity to hold a significant voice in improving mental health in the region. It is through this approach to partnerships that they will achieve both social and commercial gains in the long-run.



TALENT SPOTLIGHT

# MEMPHIS DEPAY

Barcelona's No.9 and key goal scorer for the Dutch national team, Memphis Depay is a global football star who has built the reputation as one of the most multi-faceted footballers of a generation.

A world class footballer, musician, fashion designer, entrepreneur, author and role model to a following of millions.

Memphis is a unique talent who is redefining the possibilities of modern day athletes on and off the pitch. He is blurring the boundaries between elite sport, popular culture, business and philanthropy.





## MORE THAN A PLAYER:

### FOOTBALL



**PROLIFIC GOAL SCORER.**  
SUCCESS ON THE CLUB AND  
INTERNATIONAL STAGE

### FASHION



**LEADER IN TRENDS  
AND FASHION.** NOT AFRAID  
TO BE UNIQUE.

[MEMPHISDEPAY.COM](http://MEMPHISDEPAY.COM)

### BUSINESS



**ENTREPRENEUR  
AND FORWARD THINKING.**

### MUSIC



**EXPRESSION  
THROUGH ARTISTRY**

### SOCIETAL



**MAKING THE WORLD  
A BETTER PLACE**

[MEMPHISFOUNDATION.ORG](http://MEMPHISFOUNDATION.ORG)



# 22.5 MILLION

COMBINED FOLLOWERS

 **13.4M**

 **726K**

 **2.1M**

 **720K**

 **5.6M**

 **Spotify®**



Memphis Depay

HAVEN'T REALLY PROMOTED MY MUSIC BUT PEOPLE STILL LISTEN, THAT SAYS A LOT  
I DEFINITELY GOT A LOTTA HEAT IN THE STITCHES  
STILL  
SAY TO THE PEOPLE FOLLOWING THEM  
JOURNEY THRU '18  
IT'S FAR FROM EASY

4,5 mln. streams	511,9K luisteraars
205,5K uur	166 landen

#SPOTIFYWRAPPED

WE ARE

**CSM**

# OUR CAPABILITIES AND STRUCTURE

## BRANDS

SPONSORSHIP ACTIVATION  
 CONTENT & MARKETING  
 COMMUNICATIONS  
 CREATIVE DEVELOPMENT  
 EXPERIENTIAL  
 DIGITAL & SOCIAL  
 SOCIAL IMPACT  
 CONTESTS & SWEEPSTAKES  
 PARTNERSHIP MARKETING

## LIVE

TECHNOLOGY & INNOVATION  
 LIVE EXPERIENCES  
 EVENTS  
 HOSPITALITY  
 ENVIRONMENTAL BRANDING  
 PRODUCTION  
 RETAIL

## RIGHTS

COMMERCIAL STRATEGY  
 PROPERTY REPRESENTATION  
 PARTNERSHIP NEGOTIATION  
 TALENT MANAGEMENT  
 HOSPITALITY SALES  
 BROADCAST

## STRATEGY & CONSULTANCY

CONSULTANCY PROJECTS  
 BRAND IMMERSION  
 PROPERTY EVALUATION  
 RESEARCH & INSIGHT  
 MEASUREMENT &  
 EVALUATION MODELS  
 CREATIVE & STRATEGIC  
 PLANNING



# WHO WE ARE

CSM, part of the Chime Challenger Network, is a global integrated marketing and brand experience agency working across sport, entertainment, media and social impact. Driven by a team of 1000+ people in 25+ locations, our purpose is to pursue extraordinary. Connecting with people through their passion points, we build brands, work with rights holders and create live experiences.





# THANK YOU.

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