

FOOTBALL CLUBS & CHINESE SOCIAL MEDIA

RED CARD 2014

The China Digital Champions League



Produced by Mailman Group



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The report is conducted by the professional team at **MAILMAN**. MAILMAN is a leading sports and entertainment consulting group in China with expertise in social media, fan development, commercial partnerships and sports brand development. For more information on MAILMAN visit www.mailmangroup.com

The data used in this report was provided by **KAWO**, a leading Chinese social media application which broadcasts western social networks directly across Chinese social media channels. For more information on **KAWO** visit www.kawo.com.

The results presented in the **2014 China Digital Red Card** are taken from the period November 12th 2013 to January 12th 2014. This independent study with no-bias towards any particular football club reflects the current performance of the top 13 European football teams on Chinese digital and social media. We assessed 4 core competences:

Total Followers

Total followers across key Chinese social media

Engagement

Average engagement per post

Official Presence

Total official accounts across key Chinese social media, video channels and websites

BUZZ

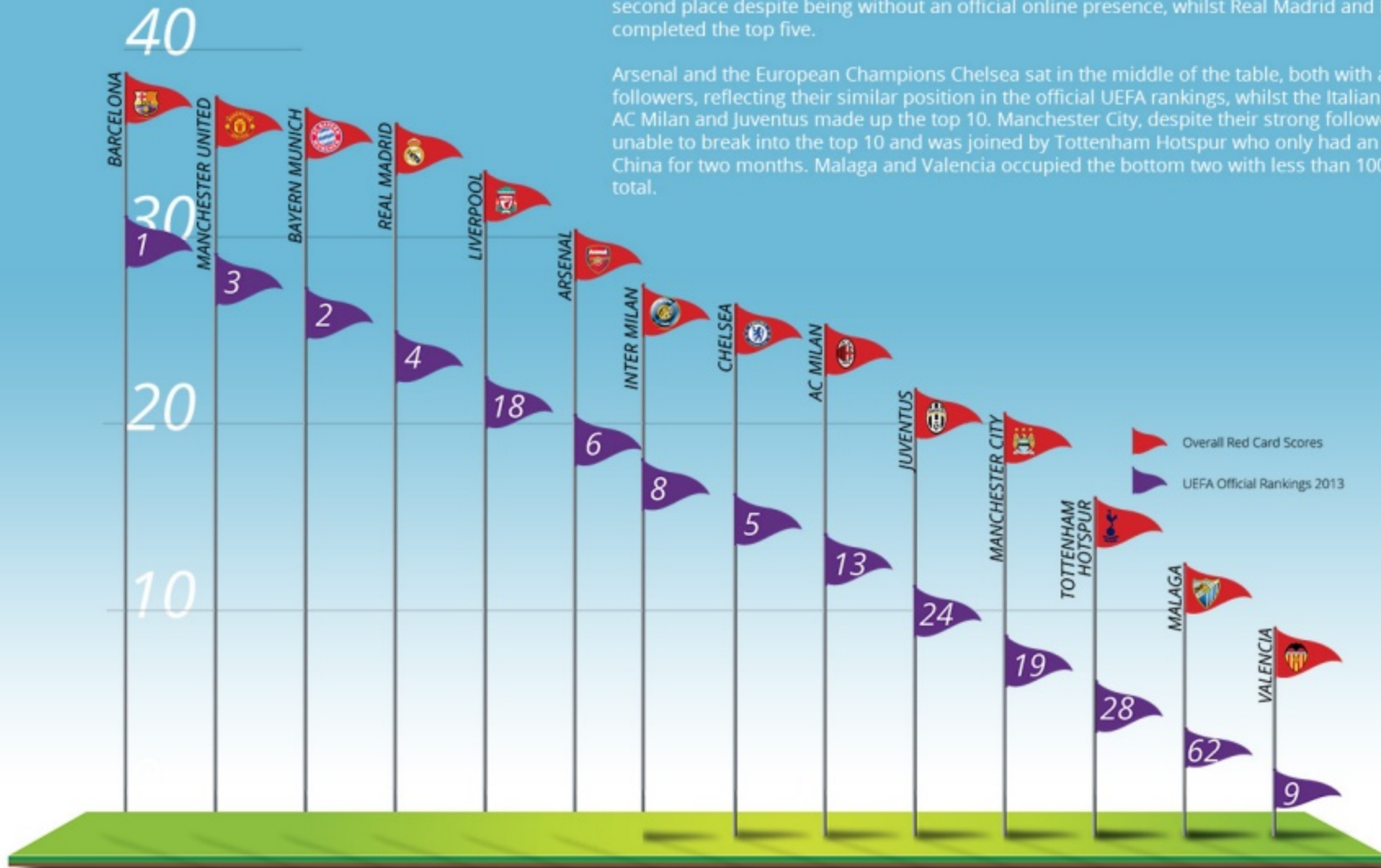
Volume of mentions of each club across key Chinese social media



RECAP LAST YEARS RESULTS

Last year saw Barcelona announced as champions of the 2013 China Digital Football Red Card to match their number one spot in the official UEFA rankings. Manchester United narrowly beat Bayern Munich to second place despite being without an official online presence, whilst Real Madrid and Liverpool completed the top five.

Arsenal and the European Champions Chelsea sat in the middle of the table, both with a high number of followers, reflecting their similar position in the official UEFA rankings, whilst the Italian trio of Inter Milan, AC Milan and Juventus made up the top 10. Manchester City, despite their strong follower growth, was unable to break into the top 10 and was joined by Tottenham Hotspur who only had an online presence in China for two months. Malaga and Valencia occupied the bottom two with less than 100,000 followers in total.



OVERVIEW OF INDUSTRY

The social media environment in China is dynamic and constantly changing, but a few clear winners have consistently emerged in the past few years. Here's a short overview of what they are:

So what's new?

1. WeChat is now more important than ever.
2. A **record number of football clubs**, brands and personalities are now all on Chinese social media.
3. They are going global, Chinese WeChat now boasts over 100m users abroad.

Chinese Internet Trends:

1. **618 million** Internet users
2. 55.8% men vs. 44.2% women
3. Average age of 25
4. 81% access the Internet primarily from **mobile**
5. **20.5 hours** online per week
6. Majority have a high school or college degree.

China's Population 1,350,000,000



Sina Weibo

- 600 million users
- #1 platform for netizens to connect with celebrities / brands
- Popular in Tier 1 and 2 cities
- Highest engagement amongst trendsetters



Tencent Weibo

- 500 million users
- China's #2 social platform
- Popular in China's fast growing Tier 3 and 4 cities



WeChat

- 300+ million monthly active users
- China's most popular instant messaging and voice multimedia service owned by Tencent
- Branded public accounts grew to 2m



TIMELINE OF CLUBS IN CHINA

2010

Jul. Liverpool launch Sina Account
Liverpool China Tour

2012

Feb. AC Milan launch Tencent Account
Apr. Chelsea launch Sina and Tencent Accounts
Ajax launch Tencent Account
May Man City launch Tencent and Sina Accounts
Jul. Bayern Munich launch Tencent Account and China Tour
Manchester City China Tour
Manchester United China Tour
Arsenal China Tour
Aug. Juventus China Tour
Oct. Bayern Munich launch Sina Account
Nov. Tottenham Hotspur launch Sina Account
Dec. Tottenham Hotspur launch Tencent Account
Liverpool launch Tencent Account

2011

Apr. Real Madrid launch Tencent Account
May Arsenal launch Sina and Tencent Accounts
Aug. Real Madrid China Tour
Sep. Juventus launch Tencent Account
Nov. Barcelona launch Tencent Account

2013

Feb. PSG launch Sina, Tencent and WeChat Accounts
May Manchester City launch WeChat Account
Jul. Manchester United launch Sina Account
Bayern Munich launch WeChat Account
Tottenham Hotspur launch WeChat Account
Aug. Tottenham Hotspur China Tour (HK)
Manchester United China Tour (HK)
Liverpool launch WeChat Account
Arsenal launch WeChat Account
Manchester City China Tour (HK)
Ajax launch Sina Account
Oct. Liverpool launch Guilin Academy
Nov. Real Madrid launch Sina Account
Dec. Liverpool announce Chinese Website
Manchester United Trophy Tour

2013 HIGHLIGHTS



Liverpool launch an academy in Guilin and announce a Chinese partnership to develop a China website.



Manchester United Trophy Tour visits three cities in China.



METHODOLOGY

We measured the digital competence of each club by assessing the 4 key categories that determine a club's success with Chinese social network users. Our objective is to provide a robust tool to understand the digital strengths and weaknesses of European football clubs, and help marketing managers of those teams achieve greater return on investment.

CATEGORIES

TOTAL FOLLOWERS

We considered the total number of followers from each club's official Sina and Tencent accounts:

ENGAGEMENT

We awarded clubs an engagement score which takes into account their average level of forwards and comments per post divided by their overall followers (to the nearest million):

Results taken over a 30 day period

OFFICIAL PRESENCE

An 'official account' is defined as an online channel authorized by the club itself. We awarded each team points for different official channels according to the popularity and importance of each platform:

BUZZ

Using KAWO technology, we tracked Sina Weibo for 30 days, scanning all posts for specific key words. Any mention of the football clubs and a football related key word was pulled into our database:

POINTS AWARDED

TOTAL FOLLOWERS

500k-1m	= 10 points
1-1.5m	= 15 points
1.5-2m	= 20 points
2-2.5m	= 25 points
2.5-3m	= 30 points
3m+	= 35 points
5m+	= 50 points

ENGAGEMENT

0-9	= 0 points	50-59	= 25 points
10-19	= 5 points	60-69	= 30 points
20-29	= 10 points	70-79	= 35 points
30-39	= 15 points	80+	= 40 points
40-49	= 20 points	100+	= 50 points

OFFICIAL PRESENCE

Chinese website	= 4 points
Sina Weibo	= 3 points
WeChat	= 2 points
Tencent Weibo	= 1 point
Youku	

BUZZ

1,000 mentions	= 1 point
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2014 CHINA DIGITAL FOOTBALL RED CARD

CLUB

		Total Followers	Followers	Engagement	Official Presence	BUZZ	TOTAL POINTS
	Bayern Munich	2.10m	25	50	10	29	114
	Manchester United	1.97m	20	40	8	37	105
	Liverpool	2.43m	25	25	11	31	92
	Real Madrid	2.61m	30	25	9	27	91
	Arsenal	2.32m	25	20	10	28	83
	Barcelona	3.09m	35	15	5	27	82
	Manchester City	9.57m	50	0	11	19	80
	Chelsea	2.79m	30	10	8	25	73
	AC Milan	1.80m	20	30	5	14	69
	Tottenham Hotspur	1.47m	15	10	7	11	43
	Juventus	1.45m	15	10	1	11	37
	Ajax	0.69m	10	20	4	3	37
	Paris Saint-Germain	1.02m	15	5	11	2	33



FOLLOWERS

TOTAL FOLLOWERS

The first category in this report considers the total number of **Sina and Tencent Weibo followers** of each club. We recognised only clubs' **officially verified accounts** and ignored the number of followers from other fan driven or unofficial club accounts.

Given the growing popularity of European football in China and to ensure that we are measuring only the top tier of European clubs, the Red Card report takes into account only clubs with a total number of followers over 500,000.



Largest Fan Base

The stand out winner of this category is Manchester City who far outstrip all of their rivals.

Smallest Fan Base

The lowest scorers in this category are Ajax and PSG, highlighting the fact that they are unable to leverage the pre-existing reputations of other teams from their domestic leagues.



FOLLOWERS



150 100 50 0



Engagement
Score

ENGAGEMENT FIGURES

In this section, we analyse the engagement of each club against their total follower number. Regarded as the matrix that defines a club's success in the social media industry, the engagement figures illustrate how effectively (or not) each club is engaging and connecting with their fans on the social networks.

Data provided by KAWO tracked each club's engagement over a 30 day period and provides us with the combined forwards and comments per post across Sina and Tencent Weibo.

To find out which club has the most engaged fan base, we take into account the amount of followers each team has. We divide their average engagement per post by the number of followers (to the nearest million).

Most Engaged

Bayern Munich possess the strongest engagement of all clubs, with an average of 317 forwards and comments per post, receiving maximum points for this score. Their treble winning season and current excellent form clearly played a major part in their China success.

Least Engaged

In stark contrast, *Manchester City's* huge follower numbers do not reflect the activity on their accounts. They are the club with the widest gap between online fans and average engagement on their accounts, resulting in a score of 0.



Average fwds/comms
per post



OFFICIAL PRESENCE

The first hurdle for any club entering the Chinese market is to select and register an official social media account. An extensive and integrated presence that engages with all demographics is the ideal situation, however, this challenge is made increasingly difficult by the growing number of social media platforms available.

We awarded each club points according to the strength of their official online presence, allocating highest points for an official Chinese website. The number of points awarded for each account reflects the importance and popularity of each platform:



Why?

A Chinese website provides a hub for all Chinese fans to access localised content, whilst Sina Weibo is considered the number one social media network resulting in these two channels being awarded the highest number of points.

* Manchester United registered their Tencent Weibo account on the 28th November 2013, however, they did not officially announce the launch until the 16th January 2014. The engagement statistics for all clubs were recorded before this period and therefore the engagement and followers from Manchester United's Tencent Weibo account have not been included.



1

Number of Official Channels



Liverpool, Manchester City and PSG have the most comprehensive presence with five official channels each.

At the other end of the spectrum, Barcelona, AC Milan and Ajax have only registered on two channels, while Juventus has just one.



BUZZ

The last category in this report calculates the number of times each club is **mentioned** on Sina Weibo. This category allows us to consider discussions that take place outside of the club's official accounts. This is important as many of these unofficial fan pages were early to enter the market, often well before the clubs' official accounts. These accounts often possess a high level of engagement, therefore can provide an additional dimension to answer to who is the most popular club.

Manchester United and **Liverpool**, with over 30,000 mentions each, are the most talked about clubs on Sina Weibo. Following closely behind are Arsenal and Bayern Munich, whilst Real Madrid, Manchester City, Barcelona and Chelsea all show similar levels of '**Buzz**'.

40000 Mentions



KAWO tracked Sina Weibo for 30 days, scanning all posts for specific key words. Any post which mentioned one of our football clubs and included the key word 'football' was pulled into our database. The 30 day period was the same for each team to ensure fairness.

Unsurprisingly, it is the Red Card top 3 clubs who perform best in this category, with the most organic online conversations.



BUZZ



FINAL STANDINGS VS. UEFA OFFICIAL RANKINGS

The Winner



Bayern Munich

TOTAL POINTS: 114
UEFA Ranking: 2



Manchester United

TOTAL POINTS: 105
UEFA Ranking: 5



Liverpool

TOTAL POINTS: 92
UEFA Ranking: 30



Real Madrid

TOTAL POINTS: 91
UEFA Ranking: 3



Arsenal

TOTAL POINTS: 83
UEFA Ranking: 7

Barcelona
TOTAL POINTS: 82
UEFA Ranking: 1



Manchester City

TOTAL POINTS: 80
UEFA Ranking: 25

Chelsea
TOTAL POINTS: 73
UEFA Ranking: 4



AC Milan

TOTAL POINTS: 69
UEFA Ranking: 12

Tottenham Hotspur

TOTAL POINTS: 43
UEFA Ranking: 16



Juventus

TOTAL POINTS: 37
UEFA Ranking: 28

Ajax
TOTAL POINTS: 37
UEFA Ranking: 24



Paris Saint-Germain

TOTAL POINTS: 33
UEFA Ranking: 19



2014 CHINA DIGITAL RED CARD INSIGHTS



BIGGEST MOVERS



BIGGEST MOVER ↑

Liverpool continued their strong growth in the Chinese market with a podium finish in two categories and rising to **3rd place overall**. They further enhanced their position this year by establishing an academy in Guilin and launching a Chinese website. As the **first club to launch online in China**, this success shows that their early investment has paid off.



BIGGEST MOVER ↓

Barcelona have dropped from 1st to 7th place since last year's Red Card, demonstrating that a team cannot rely solely on their form on the pitch for success online in China. Despite their growing number of followers, Barcelona's low engagement score and presence on only one social media platform has led to their fall from the top of the table.



HUPU SPORTS FEATURE



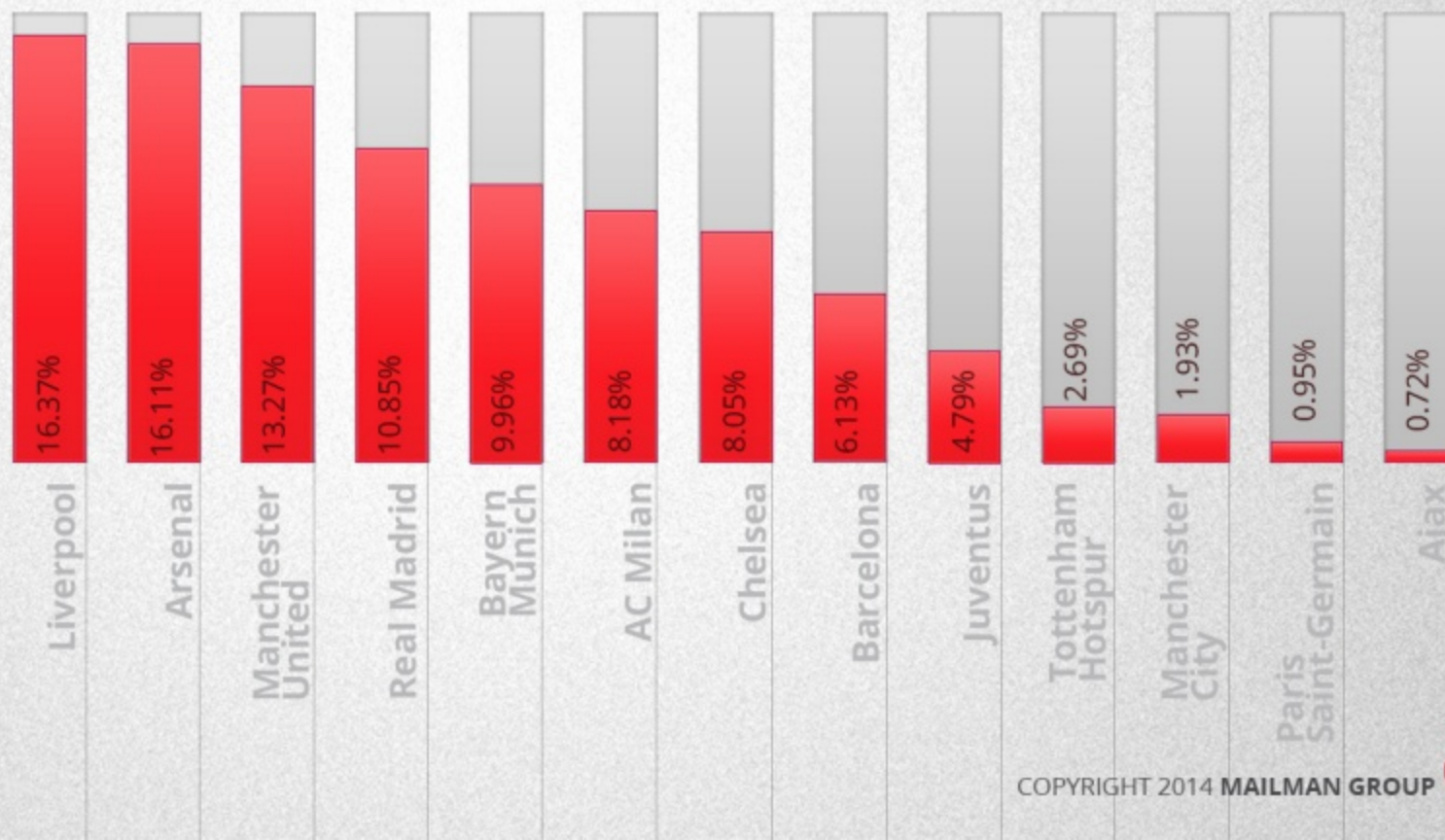
To support this report, we asked **Hupu Sports** to conduct an independent poll to determine the popularity of European football clubs in China. *Hupu.com* is a top sports portal and is China's number one online football forum (30m users/month). The poll asked 5,000 Chinese fans **'Which clubs do you follow on Weibo?'** and provides an alternative view as to which clubs are the most popular amongst active Chinese fans.



Most Popular

Liverpool took first place in this independent Hupu poll, supported by over 16% of all fans.

The results show a contrast to the total number of followers on the clubs' official accounts, highlighting a potential difference in **legitimate fans**. Barcelona and Chelsea, both with over 2.5 million fans only have 6% and 8% respectively. The most surprising outcome is that Manchester City who record over 9 million fans on Weibo, register less than **2%** of these active fans, with Tottenham Hotspur recording **more fans** than Manchester City across this independent poll.



WINNING CONTENT



Engaging

Chinese fans, like any other fan on social media, do not just want to be spoken at. Instead the conversation should be two-way and always involve a call to action.

Example: Arsenal posted a video asking fans to choose their favorite goal from the first half of the 2013-2014 season.



Chinese Twist

Teams should respect the Chinese culture when communicating online, however, the clubs that go beyond this and integrate these local traditions into their online content will find success much easier to achieve.

Example: Bayern Munich developed a video exclusively for its Chinese channels promoting the fixture between Bayern Munich and Guangzhou Evergrande.

Connecting

For many Chinese fans, the official accounts are the only medium for the fans to ever come into contact with the club. Clubs should therefore provide as many opportunities for these fans to directly connect with the club as possible.

Example: Liverpool ran a contest where three fans and the Liverpool account predicted the score for all fixtures throughout December. Points were rewarded for guessing the correct score and provided a great mechanism for fans to directly connect with the club.



拜仁俱乐部制作拜仁VS广州恒大预告片，北京时间12月18日凌晨3点30分，欧洲冠军联赛亚洲冠军在慕尼黑的巅峰对决！中国足球历史性的一刻，和世界最好球队的较量，只会有一个胜利者，你们认为是谁呢？



Incentive to Compete

Chinese fans are naturally driven to compete, so it is key to facilitate an element of competition in every contest. However, clubs must realize that whilst contests are a great way of attracting new fans, clubs must make an effort to follow the other four conditions to retain these fans.

Example: Manchester United ran a contest to win an official scarf asking fans 'how many current players made their Manchester United debut against Everton?'

弗格森爵士执教曼联期间共获得多少项冠军荣誉（包括社区盾或慈善盾）？请您分别列出赛事名称和夺冠次数，我们会在答对的红魔迷中抽取一名幸运儿，送出围巾一条。



12月6日09:41 来自专业新闻博

转发(540) 收藏 评论(516)

Official

Official club news is the foundation of any account, the content that keeps the account running. Chinese fans are attracted by the official verification attributed to each account and receiving first hand news from an official source.

Example: Tottenham Hotspur release the starting line up on Sina Weibo before any other account.



SOCIAL MEDIA HIGHLIGHTS OF

2013

8th January:

Messi wins his forth Ballon d'Or
(Sina sports video: F:3,429 C:778)



1st May:

Bayern Munich's 7-0 aggregate victory against Barcelona in
the Champions League semi-final
(F:10,812 C:1,329)



16th May:

David Beckham announces his retirement
(F:27,790 C:8,077)



25th October & 19th November:

Liverpool continue to further develop the Chinese sports
market by opening an academy in Guilin and establishing a
partnership with Hupu sports.

4th March:

David Beckham appointed as a Chinese Football Association
ambassador (F:12,922 C:3,951)



8th May:

Sir Alex Ferguson announces his retirement (F:22,114 C:6,617)



2nd & 3rd September:

Record transfer fees paid for Özil and Bale during the
summer window (Özil F: 8,920 C: 2,464 & Bale F:4,386
C:743)



9th November:

Guangzhou Evergrande FC beat Seoul FC to win the Asian
Football Confederation Champions League (F: 103,197 C:
23,337)



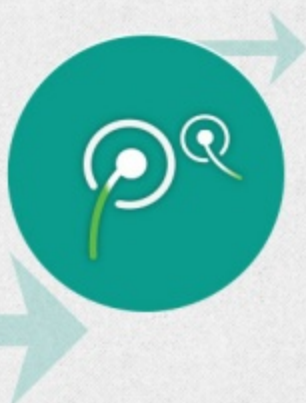
TOP PLAYERS ON WEIBO



Sina

On Sina Weibo, the top 4 players all play in the Premier League, with 6 players from this league featuring in total. Beyond these, Sina Weibo shows a more balanced top 10 with La Liga and the Turkish league also represented.

Rio Ferdinand	3,654,605
Wayne Rooney	2,805,189
Sergio Agüero	1,156,690
Alex Oxlade-Chamberlain	941,666
Wesley Sneijder	763,451
Gareth Bale	677,081
Jack Wilshere	583,387
Daniel Alves	542,840
Didier Drogba	270,628
Lukas Podolski	172,412



Tencent

On Tencent Weibo, it is clear to see that players from La Liga boast the highest figures with 7 of the top 8 playing in Spain. This is directly driven by the extremely successful period of the Spanish national team and FC Barcelona in Europe. However, the lack of English players or players from the Premier League is very surprising, with Juan Mata and Vincent Kompany the only players to appear in the top 10.

Lionel Messi	19,334,250
Cristiano Ronaldo	11,599,413
Andrés Iniesta	3,191,403
Gerard Piqué	3,019,617
Neymar	1,984,003
David Villa	1,472,425
Juan Mata	910,469
Xavi	805,092
Manuel Neuer	556,462
Vincent Kompany	513,911



SPONSORSHIP FEATURE

All statistics were provided by Asia Sponsorship News:

ASN
ASIASPONSORSHIPNEWS.COM

Sport sponsorship makes up **77% of total sponsorship** spending in China. In 2013, Chinese investment in the Football sector reached over **83m USD** (up from 69m in 2012).

77% 

Asia Sponsorship News (ASN) is the leading source of market intelligence for the Sponsorship and Branded Content industry in Asia. Operating since 2007, ASN offers industry professionals unrivalled news, analytics and insights on a subscription basis.



ASN



The overwhelming recipients of these sponsorship deals have been Chinese Super League teams, with 2013 culminating in Guangzhou Evergrande's victory in the Asian Champions League final. However, over the course of this year, we have seen a shift towards European football.

Manchester United was the first to enter the fray in 2013, completing two deals with the Wahaha beverage group and China Construction Bank. These partnerships accrued an estimated 5.5m USD and were a wake-up call to football teams around the world.

Following this, **Tottenham Hotspur** partnered with both AIA and Bosideng in the build up to this season and **Ajax** completed a deal worth around 500k USD with CST, Cheng Shin Tire.



&



The world's top sports brands continue to invest heavily into the Chinese market; **Nike** are leading the way with the **19m USD** main sponsorship of the Chinese Super League and their affiliation with 4 of China's top clubs. Their main rivals **Adidas** have partnered with the Chinese national team in an estimated 2.5m USD deal.

With the World Cup on the horizon, it is clear that Chinese investment into European football is **top of Chinese brands' marketing agendas** and 2014 will be a turning point for China's sports sponsorship industry.

Why is sponsorship in China different?

- 1) **Local knowledge** and support is critical.
- 2) Chinese investors see **ROI** very differently to their western counterparts.
- 3) A **Chinese partner** is key to closing a sponsorship deal.

The current trend is investment in **'football ambassadors'**, where top European players sign up to represent local brands within China as the face of their product or marketing initiative. Players such as **Beckham, Messi, Ronaldo and Kaka** are leading the way with several deals in place already. Messi was signed this year by auto brand 'Chery' and has become the face of Tencent's WeChat mobile platform, earning a reported 3m USD. Prior to this, Beckham was appointed the European ambassador for the Chinese Football Association, who invested 2.6m USD for his endorsement. He also represents China's leading Auto Rental brand 'CAR', adding another 1.5m USD to his commercial value.

