

Red Card 2016

China Digital Football Index

Produced by Mailman Group

#RedCardChina

Report Takeaways

01

Bayern Munich is the #1 team on Chinese digital media.

02

WeChat follower numbers are revealed publicly for the first time ever with 4 clubs reaching over 50,000 followers.

03

Manchester United is the most followed club on Chinese social media.

04

China is the #1 country for pre-season fixtures with 10 teams playing exhibition matches and the first International Champions Cup held in Asia.

05

The Bundesliga is the most popular European league on Chinese social media.

06

Three of the top 5 most followed football stars on Twitter, including Cristiano Ronaldo and Neymar, still do not have a presence on Weibo.

Editor's Note

"Now in it's 5th year, I'm proud to see the Red Card become the leading assessment of the world's best football clubs' digital performance in China today.

China is now embarking on the most significant shift in its history towards an active lifestyle. The government has publicly stated they want the country to be more active across all sports; participation is now at an all time high and access to the world's best sporting content is now seen across more networks than ever.

Digital remains the key component of any professional team's strategy to influence their popularity in the local market, gain new followers and enhance their commercial opportunities. The report aims to provide a roadmap to help guide a club's strategy to create a more engaged supporter base in China.

2015 saw a significant increase in the value and number of media rights agreements, E-commerce launched through WeChat and the explosion of professional sports teams touring China in the off-season. We expect to see this trend continue in 2016 with the ICC returning for a second year, billions of RMB being invested into sports related businesses and the commercialization of media and brand."



Andrew Collins

Group CEO, Mailman

About the Red Card

The Red Card is a globally recognized study on football clubs' digital success in China. The 5th annual report analyses all 33 teams online in China across eight different performance indicators. Our aim is to provide an independent analysis that empowers teams to make an informed decision on how to improve their China digital strategy.

The report is compiled by Mailman, China's leading sports digital and consulting agency. Mailman is trusted by many of the world's most influential sports teams, brands and athletes in developing a road map towards success in China. Mailman provides services across digital, media and commercial areas.

For many sports organizations, China has become the number one market for fan growth, revenue opportunities and untapped sponsorship. The collision of a highly competitive sports media landscape and a national mandate to bring international sport to China, has created the fastest growing sports market in the world.

“Chinese sports fans are the most in demand worldwide”



David Hornby @ Sports Matters

Part 1 - Scoring

Methodology

We assessed the top European clubs across eight key performance metrics, covering Weibo & WeChat performance, online mentions and active digital presence. The data for this year's report was collected over the period of October 15th 2015 - January 15th 2016.



FINAL STANDINGS 1 OF 3		FOLLOWERS	WEIBO	WECHAT	MENTIONS	PRESENCE	TOTAL
1.	 BAYERN MUNICH	2M	70	95	13	120	298
2.	 MANCHESTER UNITED	8.7M	80	120	16	70	286
3.	 LIVERPOOL	1.7M	55	100	7	120	282
4.	 REAL MADRID	1.3M	50	85	25	120	280
5.	 ARSENAL	3.5M	50	105	13	100	268
6.	 BARCELONA	5.3M	80	42	25	70	217
7.	 AC MILAN	390K	34	60	1	90	185
8.	 TOTTENHAM HOTSPUR	1.4M	25	32	4	120	181
9.	 MANCHESTER CITY	8.1M	58	28*	4	90	180
10.	 PSG	1.1M	30	32*	1	90	153
11.	 CHELSEA	2.5M	35	32*	10	70	147
12.	 ATLETICO MADRID	280K	12	26*	1	90	129

FINAL STANDINGS 2 OF 3

		FOLLOWERS	WEIBO	WECHAT	MENTIONS	PRESENCE	TOTAL
13.	AJAX 	570K	8	24*	1	70	103
14.	ASTON VILLA 	350K	6	26	1	70	103
15.	VFL WOLFSBURG 	400K	8	24*	1	70	103
16.	SCHALKE 04 	1.1M	25	24	1	50	100
17.	JUVENTUS 	11K	12	0	1	70	83
18.	EVERTON 	11K	4	0	1	70	75
19.	INTER MILAN 	450K	12	32*	4	20	68
20.	B. MÖNCHENGLADBACH 	440K	10	0	1	50	61
21.	A.S. ROMA 	53K	6	24*	1	20	51
22.	SUNDERLAND 	65K	4	24*	1	20	49
23.	BORUSSIA DORTMUND 	710K	16	0	1	20	37
24.	WEST BROMWICH ALBION 	80K	6	24	1	0	31

FINAL STANDINGS 3 OF 3

		FOLLOWERS	WEIBO	WECHAT	MENTIONS	PRESENCE	TOTAL
25.	 STOKE CITY	50K	4	24*	1	0	29
26.	 CELTIC	2K	4	0	1	20	25
27.	 VILLARREAL	710K	10	0	1	0	11
28.	 WERDER BREMEN	270K	6	0	1	0	7
29.	 HAMBURGER SV	260K	6	0	1	0	7
30.	 FIORENTINA	35K	4	0	1	0	5
31.	 LAZIO	7K	4	0	1	0	5
32.	 EINTRACHT FRANKFURT	2K	4	0	1	0	5
33.	 CHIEVOVERONA	23K	4	0	1	0	5

*For the clubs that did not provide their WeChat follower number, we have published an estimated figure based on 1) their level of reads, 2) competitor averages, 3) level of activity.

*Malaga FC, AFC Bournemouth and Valencia have not been included in this year's report having been inactive throughout the measurement period.



Weibo



Most Followed

Manchester United is the most followed team on Chinese social media with 8.7 million fans. Manchester City is the second most followed team but ended the year with negative growth. Following a major crackdown on fake followers, there was very slow growth across the board, with the majority of clubs instead focusing their effort on driving engagement.



Most Engaged

Bayern Munich is the most engaged team for the 2nd year running, closely followed by Barcelona and Liverpool. The standout team this year is AC Milan who 6 months after their re-launch in July, finished the year with the highest engagement per post of any club. Engagement has become the most accurate metric to determine the real popularity of a club in China.

Weibo Evolution

Weibo continued to grow in 2015, ending the year with over 200 million monthly active users. Football is the #1 most followed sport on this platform with more than 35 European teams and 70+ million total followers. This is the first year in which clubs' Tencent Weibo followers were not included due to decreased follower numbers and pervasive fake engagement, with Tencent shifting its resources to WeChat and other initiatives.

Despite registering lower monthly active users than WeChat, Weibo is still the #1 social platform for teams to grow their exposure and fan base. This year saw Weibo roll out their promoted posts initiative, with two options to improve the exposure of social content to your existing and potential fans.



In an independent report released by Weibo Sports, Liverpool FC were announced as the most influential European team on Weibo, ahead of Bayern Munich and Manchester United.



WeChat Exclusive



Most Followed

Red Card 2016 is the first time that football teams have publicly disclosed WeChat follower figures. The top 4 most followed teams are Bayern Munich, Real Madrid, Arsenal and Manchester United. WeChat followers represent the top bracket of a club's local fanbase. These are the most engaged and active fans who are the target audience for merchandise, tickets sales and sponsored content.



Most Engaged

Engagement on WeChat is measured through the size of a club's total monthly readership. Manchester United and Liverpool have the two most influential WeChat accounts both reaching over 450,000 monthly reads, with an estimated 35% of their followers interacting with every post. This is a statistic unrivalled on any social platform worldwide.

WeChat Evolution

WeChat had a huge year growing to 650 million monthly active users. It continues to innovate well beyond a messaging app, as WePay has become a popular form of payment for bills, movie tickets, taxis and other services.

The platform has gradually opened up its user base to businesses and brands, building out official Service accounts, Subscription accounts, and launching their advertising model. WePay will continue to grow, making payments easier and faster for its users. Although no Football club has yet to open an official WeChat store, there are many making a big push to commercialize their presence on WeChat.



Manchester United have the largest monthly readership of any European club on WeChat.

Methodology



Weibo Mentions

Barcelona finished as the most mentioned team on Weibo, with online discussions around their team driven by several factors, most prominent being Messi's record 5th Ballon d'Or win and El Clásico. However, it was their semi-final fixture against Guangzhou Evergrande in the FIFA Club World Championship that created the most hype on Weibo, with around 160,000 mentions on this day alone.

Mentions Rankings



305,000



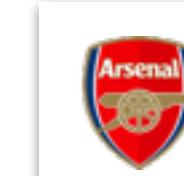
271,000



155,000



147,000



128,000



MAILMAN

© MAILMAN 2016 - ALL RIGHTS RESERVED

Presence



E-Commerce

Bayern Munich and Real Madrid both launched their official Tmall stores this year, joining Tottenham Hotspur, Liverpool and Arsenal as the only teams with an official presence. 14 teams in total have a Chinese language online store, opening up additional revenue channels through official merchandise sales. Heightened interest from both Jingdong and WeChat to work with football clubs will lead to the biggest year of growth for official football E-commerce platforms.



Video

Still the dominant video network in China, Youku (China's equivalent of YouTube) is the most effective way to deliver club video content to millions of eager Chinese football fans. 2015 was a year of positive change for Youku, who were bought by Alibaba Group in a deal worth \$4.8 billion.



Presence Cont'd.

Website

The top 10 teams now all have a Chinese language website, with 19 clubs in total with an official local site. Launching a localized site has become a prerequisite for any European club looking to develop and monetize their China presence, providing a central platform to activate and grow China partnerships.

European clubs have approached Chinese language sites with two distinct strategies; 1) partnering with a Chinese media network to launch a local website, ensuring huge promotional benefits, and 2) developing their own stand-alone site based on the global model.



Hupu Sports have established themselves as the preferred website partner for many clubs including FC Bayern, Liverpool FC and AC Milan.

Biggest Movers



FROM 12th TO
7th

AC Milan created huge excitement ahead of their China tour by relaunching their presence on Weibo and WeChat. They played two ICC fixtures against top European opposition, bringing a wave of positive media exposure. The club's fans are some of the most active in China and their support over the past 6 months has significantly widened the gap between AC Milan and their Serie A rivals.

Juventus also launched a Weibo presence in July prior to the Italian Super Cup final vs Lazio in Shanghai. However, they have experienced a very different level of growth to AC Milan. With only 10,000 total Weibo followers and an engagement 4 times lower than their Italian rivals, Juventus has dropped out of the top 15 for the first time in Red Card history.

FROM 14th TO
17th



A Word From the Winner

"As the Chinese market grows in importance for FC Bayern and more effort and attention is invested in it, we're delighted to have finished top of the 'Red Card' China digital football index. 2015 saw us take part in a tour of China, launch a new Chinese website and become the first European club to develop our own Chinese app. These platforms are set up around our new online fan shop on Tmall, through which we are able to deliver official merchandise to our supporters in China. Especially the digital platforms help FC Bayern to get closer to its Chinese fans and make the club even more popular."



Stefan Mennerich

Director of Digital Media and Media Rights and IT, FC Bayern Munich

Part 2 - Insights

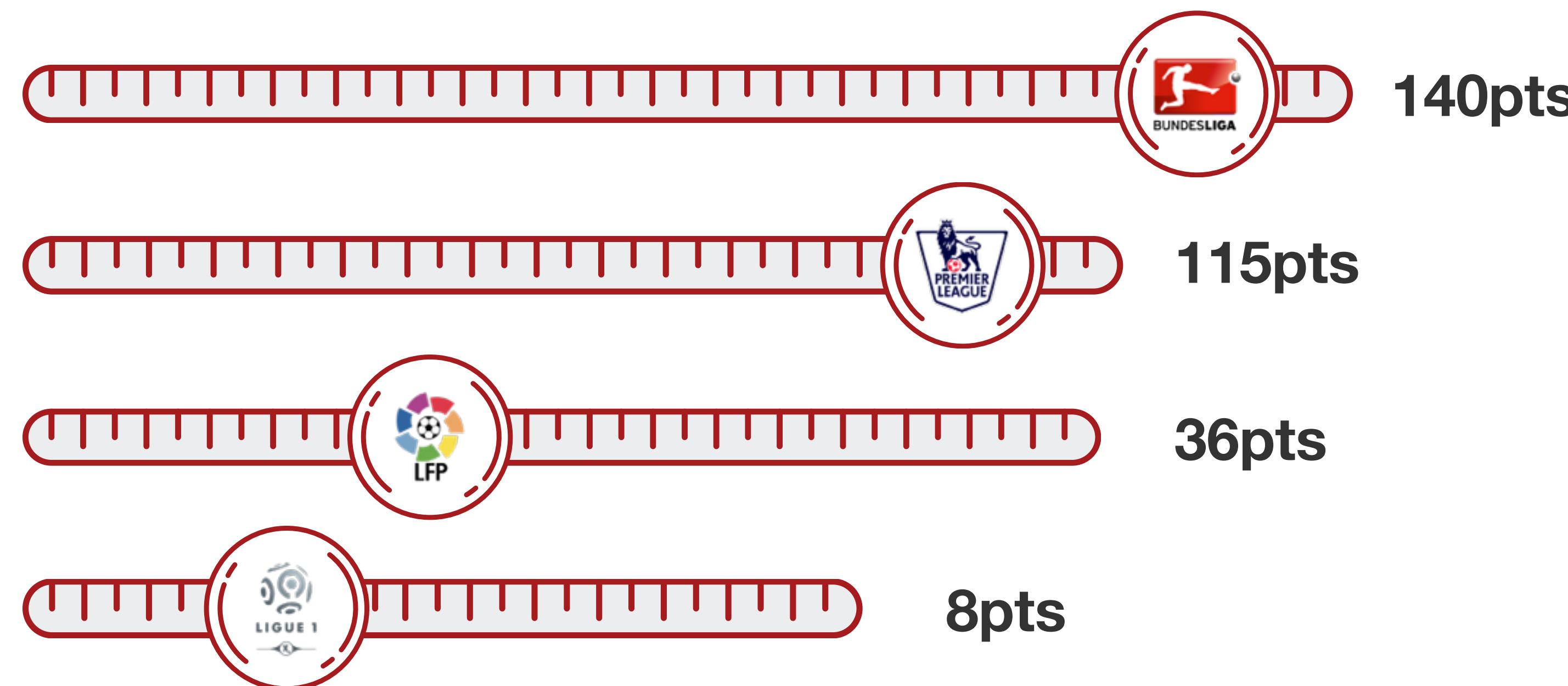


MAILMAN

© MAILMAN 2016 - ALL RIGHTS RESERVED

The Social League

The Premier League claims to have over 170 million fans in China, 100 million more than the total number of European football clubs' followers on Weibo. La Liga was the first European league to launch online back in January 2012, however the Bundesliga and Premier League soon followed suit and quickly outperformed them. Four years later, who is now challenging the Premier League on Chinese social media?



Why Bundesliga are #1 on social

1. **Engagement focus** - the Bundesliga social accounts have 3 times more engagement than the Premier League. Their focus on off-the-pitch, behind-the-scenes content works just as well as match day coverage.
2. **National success** - the current generation of football fans have been inspired by a combination of Germany's dominance at international level and the growing number of stars playing in the domestic league.
3. **Broadcast reach** - the Bundesliga has secured broadcast deals with four major networks in China, rather than one exclusive deal, most importantly, 20+ consecutive seasons with CCTV5. The increasing influence of social media has played a major role in driving up the value of broadcast rights this season.

“It’s remarkable to see that Serie A is the only top European league not online, and now in real danger of falling behind the other European leagues, including the Scottish Premier League and Eredivisie, who have recently secured broadcast deals with major networks.”



Tom Elsden

Strategy Manager, Mailman

China's Broadcasting Landscape

2015 was the first year that IPTV broadcast deals surpassed the value of traditional TV rights. Although CCTV5 still has by far the widest reach nationwide, media giants such as Sina Sports, Tencent, LeTV and PPTV are changing the face of the broadcasting landscape.

New Era For Broadcasting

1. With relaxed broadcasting rules, media agencies can sub-license their rights to competitors, opening up the market to an increasing number of new players.
2. Although some networks are trialling a subscription service, accessing live content for free is still the norm. It would take a major combined effort from all broadcasters to change the mindset of Chinese fans to pay for content.
3. The fees for broadcast rights in China, for both domestic and international leagues, are growing exponentially. The Chinese Super League rights were sold for RMB 80 million in 2008, with a new 5 year deal agreed in September 2015 for RMB 8 billion (\$1.25 billion) by China Sports Media (体奥动力).

China's Broadcasting Landscape Cont'd.

	PREMIER LEAGUE	BUNDESLIGA	SERIE A	LFP	LIGUE 1
LeTV	✓	✓	✓		✓
CCTV	✓	✓			
PPTV		✓		✓	
Tencent	✓	✓			
Sina	✓	✓			
Super Sports		✓			

The Premier League is the most covered European league in China available on 20 TV channels. According to Yu Lingxiao, VP at Super Sports, Arsenal vs Manchester United was the most watched Premier league match on CCTV in 2015, recording a 0.36% audience share (an estimated 100+ million viewers), preceding all other top European leagues.



“In a market where fans get content for free, online media networks are spending record amounts on broadcasting rights to capture market share, still without a sustainable business model.”



David Hornby

Sports Business Director, Mailman

Summer Tour

China was the #1 destination for European football clubs in the summer of 2015 with 10 teams playing exhibition matches. The ICC tournament hosted its first China event, while the Italian Super Cup returned for a third time.

-  **Bayern v Valencia** • July 18th • Audi Tour
-  **Bayern v Inter Milan** • July 21st • Audi Tour
-  **Bayern v Guangzhou Evergrande** • July 23rd • Audi Tour
-  **AC Milan v Inter Milan** • July 25th • ICC
-  **Inter Milan v Real Madrid** • July 27th • ICC
-  **Real Sociedad v Rayo Vallecano** • July 28th • Friendly
-  **Real Madrid v AC Milan** • July 30th • ICC
-  **Shanghai SIPG v Atletico Madrid** • August 4th • Friendly
-  **Juventus v Lazio** • August 8th • Italian Super Cup

Why Tour China?

1. **Expand your digital presence:** Real Madrid and Bayern Munich both launched their Tmall stores, whilst AC Milan combined their tour with the launch of their new Weibo and WeChat accounts.
2. **Commercial opportunities:** Real Madrid cemented their agreement with Alibaba Group, part of their long-term plan in partnership with Guangzhou Evergrande.
3. **Social performance:** teams on tour experienced around 2x higher engagement than average and 50% higher follower growth.

The ICC made a strong case as to why participating in one of their events is far more powerful than club's running their own tours. The level of media exposure, tickets sold and online conversation was far superior to any previous club tour and has set the benchmark for all future China fixtures.

How will ICC build on the success of last summer?

"We will focus on working even better with our sponsors, broadcasters and strategic partner LeSports in 2016 to bring the event to life as early as possible after launch. The event will deliver far more to Chinese fans than three games of football. It's likely that we will have a new host city on our list and a more English flavor to the line-up."



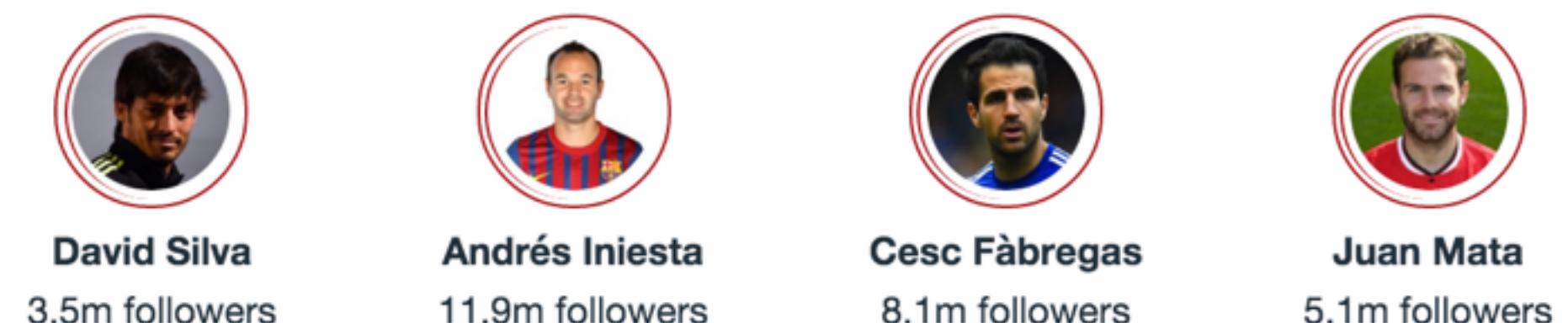
Ned Negus

VP, Sales & Marketing for ICC
(Asia-Pacific)

Player Power

This year's final three Ballon d'Or contenders, Cristiano Ronaldo, Lionel Messi and Neymar Jr, are still without an official presence on Weibo. As a result, the brands who pay them millions of dollars in endorsements every year are losing out when it comes to China.

To the right are Twitter's most followed football stars, all without an official presence on Weibo.



How can athletes control their social media in China?

[Mailman Pro](#) enables global athletes to sidestep the language barrier and broadcast their social media in China via one platform, making access to Weibo easier and more manageable. We expect to see at least 50 new players online in 2016.



Player Social Insights

1. Authenticity is key. Chinese fans are quick to identify and criticise any account not run by the player himself.
2. Chinese fans respond best to emotional and personal posts. On average, a player's Weibo engagement is 3x higher than that of a club account.
3. The new generation of football fans are more attracted to star players than the team they represent. Clubs should harness their influence, incorporating player accounts into their digital strategy.

Why is building your Weibo fan base to over 1 million followers important?

"In China the most important thing for me is respect. I use Weibo to communicate with my fans and feel as close to them as possible. They always show me much love, so I find this as a way to give them something back."



Ronaldinho

Professional Footballer

2016 Predictions

Sport has become a focal point of China's economic growth and government policy. The powerful combination of state investment and a highly competitive media landscape, means that the demand for sports content has hit an all time high.

01

WeChat Payment • 42% of Singles Day purchases were made through mobile devices - that's over \$5.7 billion. As WeChat further develops its payment function, which already has over 2,000 official stores registered, football clubs will explore the opportunities this presents. Alibaba (Tmall) confirmed their interest in football through a deal with Real Madrid, and now Tencent (WeChat) have turned their attention to e-commerce in a big way through increased investment.

02

Commercially Successful China Tours • ICC's inaugural China event sold over 110,000 tickets across three cities and provided the best case study of how to run a successful tour to China. Real Madrid, AC Milan and Inter Milan reaped the benefits of ICC China both commercially and through the media attention generated, whilst FC Bayern opted to manage their own China tour, generating a reported €10 million. Alongside the US, China has now become the destination of choice for international tours and we can expect to see more competitive fixtures with even bigger names for the summer of 2016.

2016 Predictions Cont'd.

03

Club TV Channel Partnerships • Liverpool was the first European team in China to successfully monetize their digital content through a video partnership with PPTV. Ajax and Manchester United have since launched partnerships with LeTV and Sina Sports, and we can expect to see many more club TV deals in 2016. Competition to acquire live broadcasting rights has grabbed headlines this year, although networks like Sina Sports are pioneering the concept of driving value by creating bespoke sports content and keeping fans engaged 7 days a week, rather than just on match day.

04

China Investment • As European clubs increase their efforts to develop a successful China strategy, they are becoming increasingly attractive to Chinese investors. We can expect to see an enormous level of investment from Chinese companies into European football through both sponsorship and acquisition. Huawei (Arsenal, PSG, AC Milan), Hisense (Euro 2016) and Yingli (FC Bayern), are just a few who have established themselves as credible global partners. On the investment front, Atlético Madrid, Espanyol and FC Sochaux are already part or fully owned by Chinese companies, with many more top clubs already in negotiations.

Word From the Experts

★ Sam Li ★

Head of Content Acquisition and Strategic Partnership,
Sina Sports



How is Sina Sports looking to work with European football clubs in 2016?

"We are very focused on football as it is one of the major spectator sports in China. Lately, we feel there has been an overemphasis on live games. In reality, most fans spend the majority of their time consuming non-live game content such as news, interviews, gossip, etc. and only a small portion of their time watching live games. Our strategy is to work with individual football clubs to license as well as co-produce interesting and relevant content."

★ Sam Xie ★

General Manager of Sports Business Development and Marketing, Tencent



How is Tencent looking to work with European football clubs in 2016?

"In 2016, Tencent is looking to establish partnership with more football clubs in areas including content, video, social media and e-commerce. Tencent will provide more multi-dimensional coverage preferably on an exclusive basis. We also look to bridge the gap between fans and clubs, helping expand a team's fan base and outreach to the China market."

Word From the Experts

★ Zhan Jun ★

TV Commentator



How has the rise of IPTV in the past year impacted the growth of European football in China?

“It has made it easier for fans to watch European football, actually not only has LeTV made an impact on this but so has PPTV. [In 2016] Perhaps we'll see more cooperation between clubs and Chinese Internet TV networks, making their own Club TV programs more popular in China.”

★ Zhang Bin ★

Director of CCTV 5+



Following the growth of IPTV, how do you see the future of China's broadcasting industry?

“Diversity will become the trend in sports communication in the future. In the past, the demand for television or the big screen is on the top of the list for the sports audience. I believe people won't leave the big screen, but they will pursue more channels to watch sports.”

THANK YOU FOR READING

Want more information? Contact info@mailmangroup.com