

F O O T B A L L  C L U B S & C H I N E S E S O C I A L M E D I A

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RED CARD

2013 China Digital Champions League

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ABOUT THE
STUDY

*All data was analysed in the
period between December 1st
2012 and January 15th 2013.
This study is complemented
by 6 key findings emerged
from the research.*

In December 2012, Mailman Group
executed the most comprehensive study
to date across China's social media
landscape, to assess the top European
football clubs' China Digital performance.

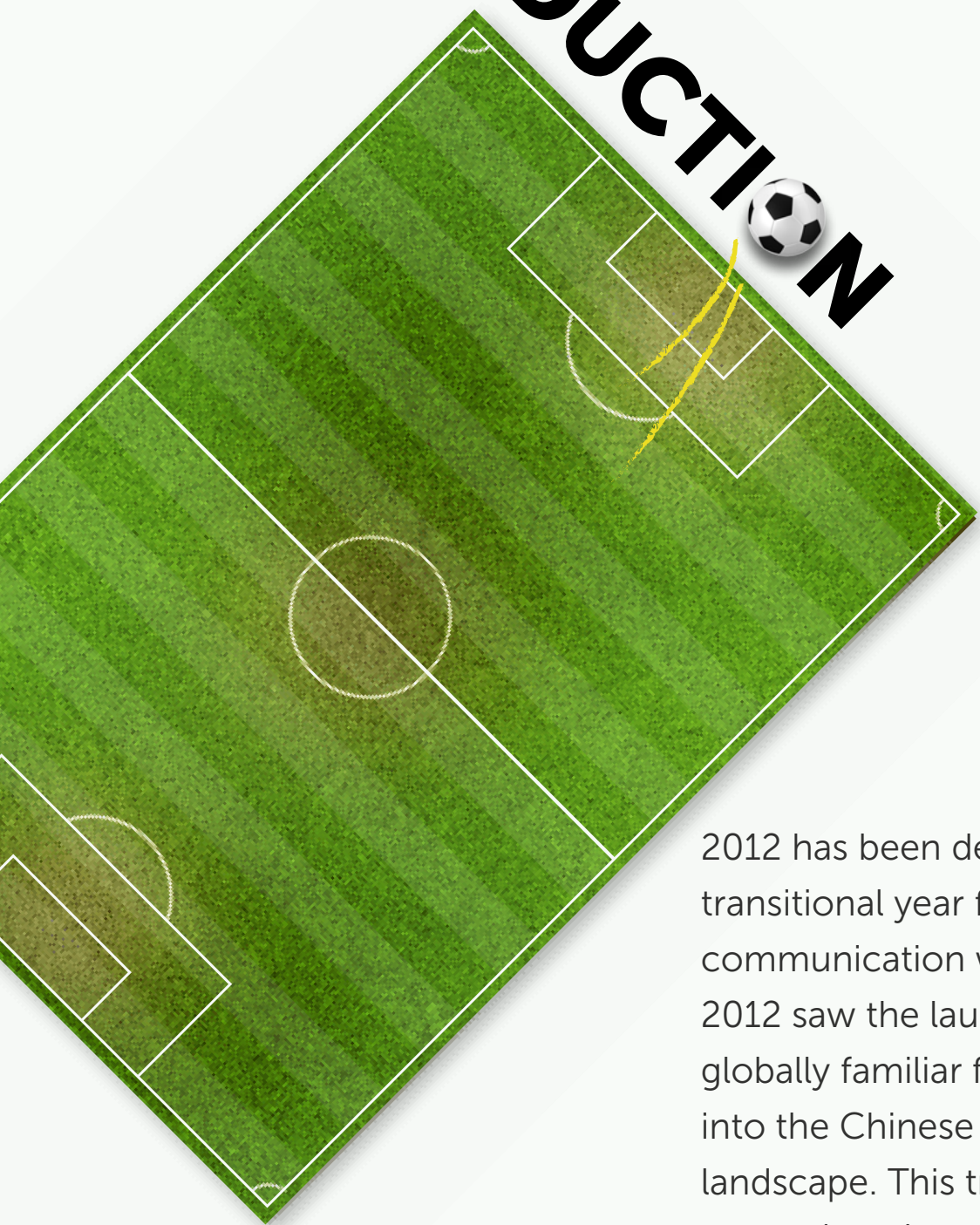
We assessed

14 teams'
presence across the two largest micro-
blogging sites in China: Sina Weibo
and Tencent Weibo, and ranked their
digital competency through 5 core
competencies.





REDCARD INTRODUCTION



2012 has been defined as a transitional year for football clubs' communication within China. 2012 saw the launch of several globally familiar football clubs into the Chinese social media landscape. This trend is expected to continue into 2013-2014 as China digital habits become even more important for UEFA clubs to connect with this influential audience.

In China, the demand for football clubs' social media presence is booming as the exposure for international football rises. This study found a total number

of **15.6 million**
football fans across **14 teams'**

social media accounts, a significant increase from 2011. China's transition has also seen the introduction of Western players and coaches to the domestic game as a strategic focus, which provides a clear opportunity for international teams to establish awareness across the country.

This study attempts to quantify the digital competence of the top 14 football teams present on Chinese social media. Each club is assessed without bias across 5 competencies that determine the clubs' "current state of play" within China's digital landscape.

We hope the statistics presented provide global football marketing departments and management with a greater understanding of the opportunities within China.

Chinese football fans are on the rise, with access to games now streaming through online portals, coupled with domestic television rights - China social media networks present a unique opportunity to capture and develop a deeper fan base.

Pages 19-29 offer insights taken through this study.



A WORD ON CHINESE SOCIAL MEDIA

Chinese social media presents an entirely parallel and separate ecosystem to the rest of the World. Chinese consumers engage in online conversations and interact with brands predominantly on 'Weibo' (literally translated as 'micro-blog').

There are two major Weibo platforms used in China:

Sina & Tencent

The former acquired the URL weibo.com in 2011 and is commonly referred to in the Western world as simply 'weibo'. The latter is housed under the URL t.qq.com (**note: QQ is Tencent's Instant Messaging service**).

Considering that
89%
of Chinese netizens
use one of the two top
Weibo platforms, this
study was conducted
on both networks.

Besides Sina and Tencent Weibo, there is a third network frequently mentioned in the Western media:

RenRen

often mistakenly referred to as 'the Chinese Facebook'. RenRen was not considered in this study as it is still relatively unused by football clubs, however it presents considerable opportunities for football clubs to develop brand awareness in China, specifically among students and the younger demographic.

Sina Weibo	Tencent	RenRen
		
 287 M Active Users	 277 M Active Users	 45 M Active Users
 400 M Registered Users	 507 M Registered Users	 162 M Registered Users
 73% Netizens Penetration	 93% Netizens Penetration	 35% Netizens Penetration
 Tier 1 & 2 Cities Key Demographic	 Tier 3 & 4 Cities Key Demographic	 Students Key Demographic
 High Engagement	 Low Engagement	 High Engagement

5 METHODOLOGY

	Categories	Metrics
TOTAL FOLLOWERS	Listed as the official club account OR most popular club branded account.	1 point per 100,000 followers across the two key social networks. (1/2 point = 50,000 fans)
OFFICIAL PRESENCE	Defined as a fan page authorized and supported by the official UEFA club. NOTE: Not to be confused with a 'verified account' obtained simply by registering with the given social network.	3 points per official account, verified by the club, across Sina and Tencent Weibo
ENGAGEMENT RATE	Average number of forwards (retweets) and comments over an average 50 consecutive posts.	1 point = 25 forwards/ comments per 100,000 followers.
LOCALIZATION	Percentage of content translated in Mandarin (simplified Chinese) and of content directly targeting the Chinese fans. BONUS: Points awarded for China specific communication.	1 point = 50% translated content 1 point for use of localized content 1 point for specialized China posts
POPULARITY INDEX	Measured by the number of fan pages existing on the social networks. Pages must have a minimum number of 10,000 followers to be taken into consideration.	1 point = a fan managed page with at least 10,000 fans. 2 points = a verified news page run by a network with over 100,000 fans

CLUB	TOTAL FOLLOWERS	OFFICIAL PRESENCE	ENGAGEMENT	LOCALIZATION	POPULARITY INDEX	TOTAL POINTS
 BARCELONA	2m	Y	-3	4	14	38
 MAN UTD	400k	N	17.5	n/a	15	36.5
 BAYERN MUNICH	700k	Y	13	4	6	36
 REAL MADRID	2.1m	Y	-4	3	12	35
 LIVERPOOL	750k	Y	9	4	8	34.5
 ARSENAL	1.05m	Y	5	4	8	30.5
 INTER MILAN	200k	Y	13	3	9	30
 CHELSEA	2.1m	Y	-12.5	4	7	25.5
 AC MILAN	1.1m	Y	-3	4	9	25
 JUVENTUS	700k	Y	2	4	7	23
 MAN CITY	4.35m	Y	-34	3	3	21.5
 TOTTENHAM	150k	Y	2.5	4	1	15
 MALAGA	50k	Y	6	2	1	12.5
 VALENCIA	30k	Y	2	4	0	9

* Data presented here is a close approximation up to 15th January, 2013



Methodology
TOTAL FOLLOWERS

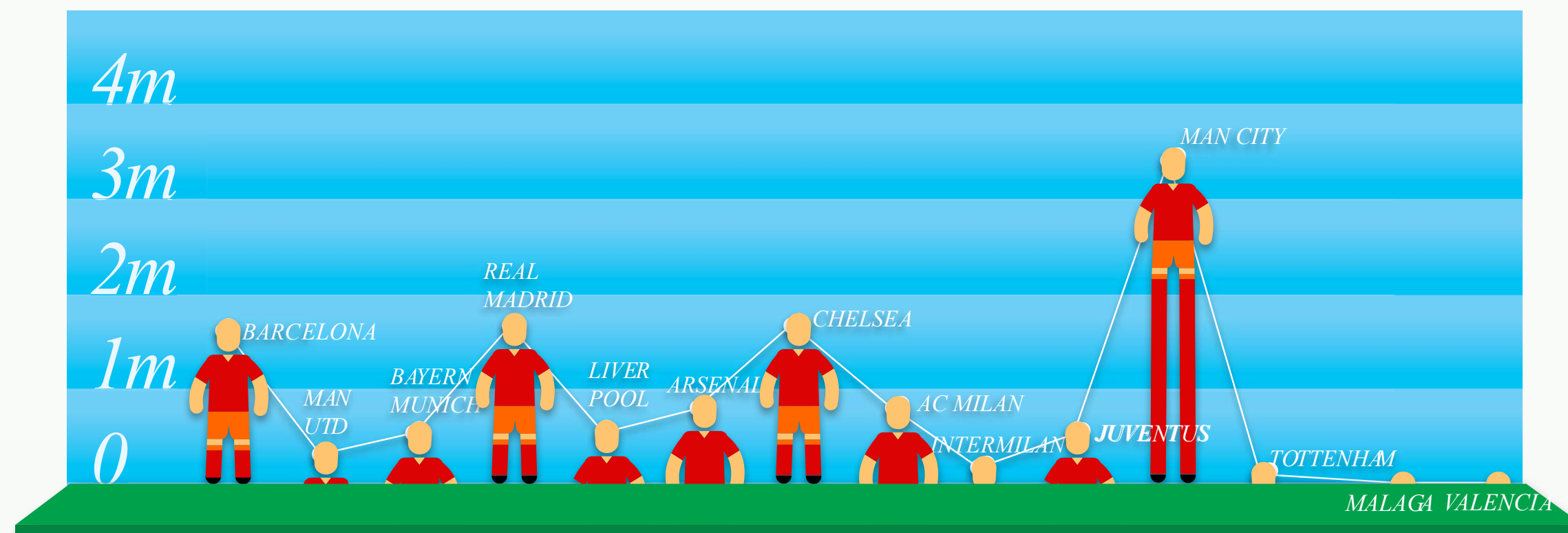


Figure 1:
Total follower numbers from Sina and Tencent Weibo taken on Jan 15 2013.

In the first section of the study, we considered the clubs' largest Sina and Tencent Weibo accounts and calculated the total number of followers. We primarily considered official accounts, recognized and authorized by the teams' management. Where official accounts were missing, the analysis considered the largest verified accounts featuring news, and managed either by the social network or by fans.

The Red Card considers 100.000 followers as the minimum competency level a team should achieve for digital success. We found the average number of followers of the teams analysed to be above this target, settling at 1.1m followers.

Manchester City was the winner in this category, with a number of followers

4 times above average. The lowest scores were achieved by Spanish teams Malaga and Valencia, which still have low brand awareness on the Chinese market.



Methodology

OFFICIAL PRESENCE

- No Official Accounts
- Official Accounts on 1 Platform
- Official Accounts on 2 Platforms

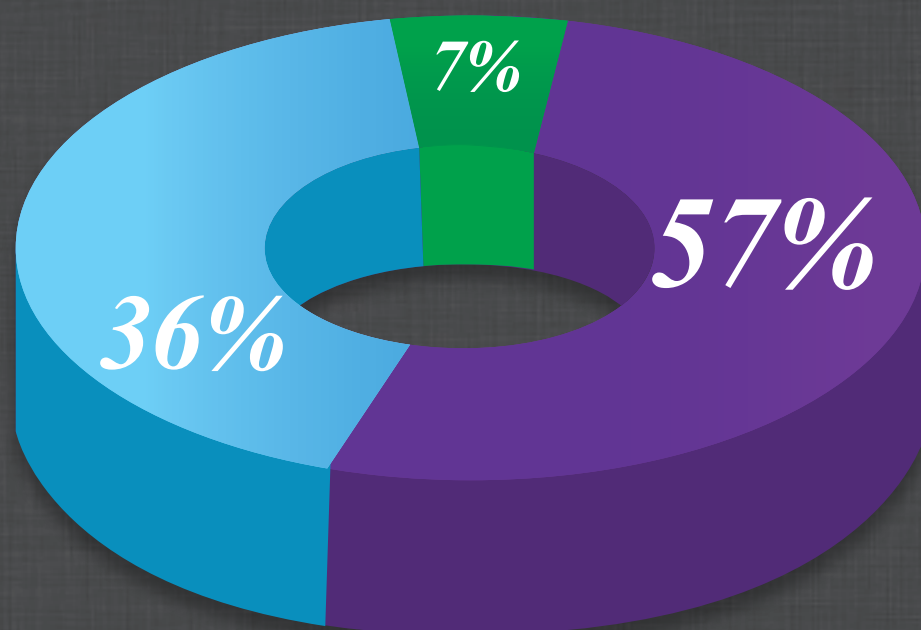


Figure 2:
Percentage of
teams with an
official accounts
on two, one or no
platforms.

The diversity of the Chinese social media landscape can often become a challenge for brands and sports organizations. Choosing where to invest a digital marketing budget is not always an obvious choice when such an intricate ecosystem is presented.

In this section, we analysed each team's effort to establish an official presence- defined as an account verified by the social network and authorized by the team's management.

As seen in the chart presented in figure 2,

57%
of the clubs analysed have an official – authorized – presence on the three platforms.

36%
of the teams are not yet present on both major networks and 7% of the teams has not yet opened an approved official page on any of the social networks examined.



Methodology

ENGAGEMENT

In this section, we analysed how effectively each football club engaged with fans in China, allowing them to connect and interact within their social networks. Defined as “the new currency for social marketing effectiveness”, engagement featured prominently in this research.

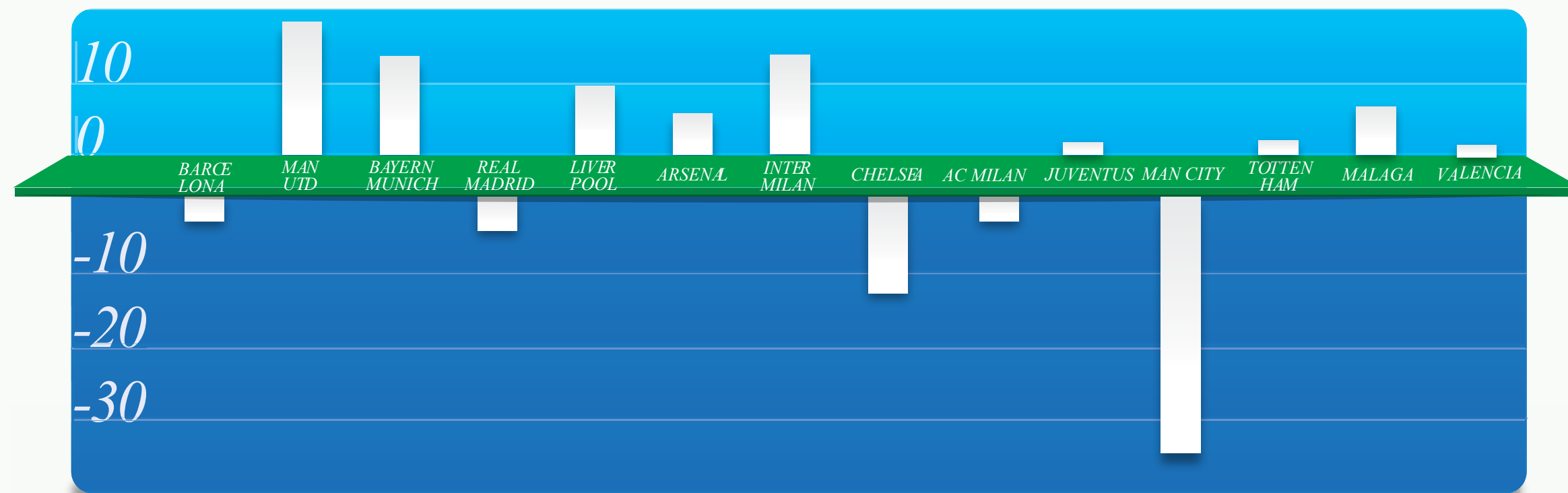


Figure 3: Number of forwards and comments for a sample of 50 consecutive posts on a team's page.

Engagement rate was calculated by examining the average number of forwards and comments from a random selection of 50 consecutive posts. The data was collected during the same period of time for each team to ensure fair results. A club's success was determined based on an engagement scale which awarded points as follows: 1 point = 25 forwards/comments per 100,000 followers. This is the minimum level of activity expected on a successful page according to how many followers there are. Clubs with low engagement scores were taken into account and assigned negative points.

As shown in figure 3, clubs such as

Manchester United & Bayern Munich

presented high engagement rates with an average of over

200

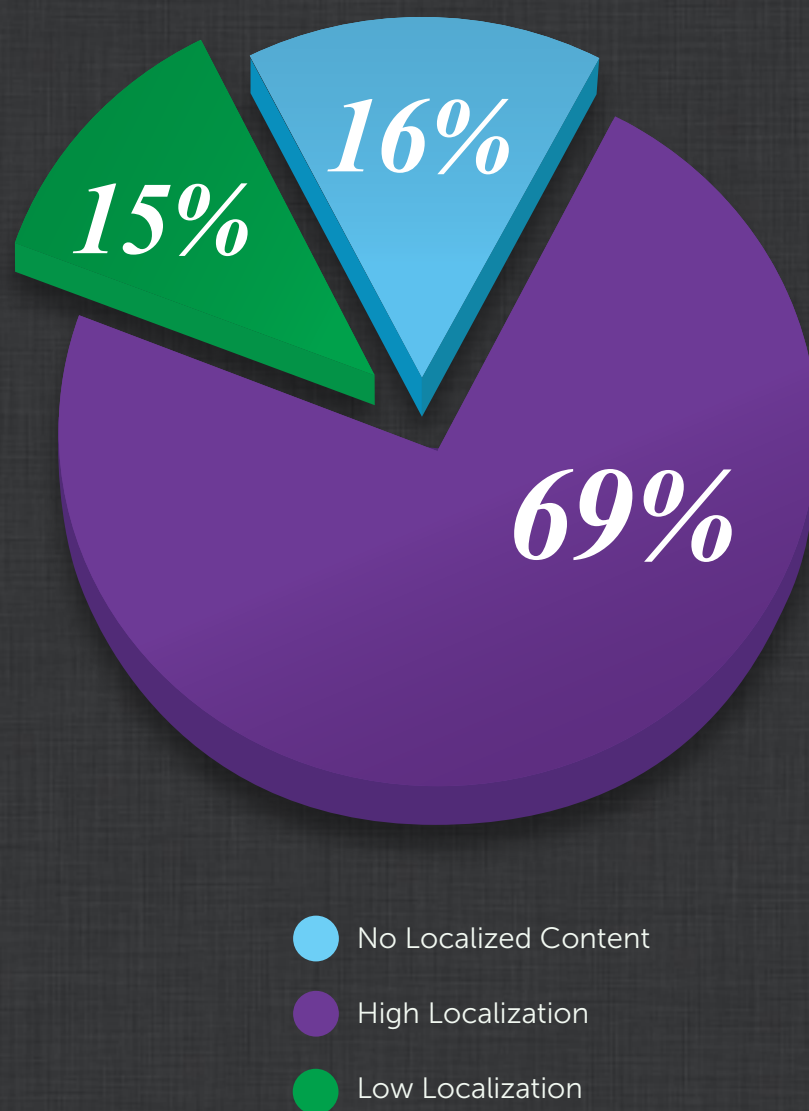
forwards and comments for each post. Unfortunately, over 1/3 of the teams analysed did not meet what is considered the minimum requirement for successful engagement and were penalized in the ranking. For example Manchester City, which ranked last in this section due to the vast gap between their follower numbers and average engagement score.



Methodology

LOCALIZATION

Figure 4:
Percentage of
clubs with posts
translated in
Mandarin.



Chinese social media presents evident language and cultural barriers to brands and international sports organization entering the market. For this reason, this paper rewarded the football clubs that had made a clear effort to communicate with their fans in their language on their level.

The study considered three variables: firstly, the percentage of content translated in Mandarin; secondly, the percentage of posts directly targeting the Chinese fans: containing specific cultural insights or posts timely to events specific to China (e.g. Chinese New Year greetings); thirdly, additional points were awarded to teams which demonstrated exceptional efforts in China communication strategies. Examples of exceptional localized content can be found in the appendix.

As far as translation of posts is concerned, the data analysed shows evidence that

69%
of the clubs were displaying a **high localization of content** (90% of posts in Mandarin).

15%
of the clubs examined translated at least 50% of their posts, but lacked featured posts. The remaining teams presented content only in English.



Methodology POPULARITY INDEX



The last category taken into account in this study was the popularity of each club with social media football fans. Indeed, thanks to the clubs' numerous offline promotional efforts in China, social media users develop their own fan pages, which often become the main source of news for a large number of netizens.

For this reason, we determined popularity by considering the amount of fan-generated pages with over 10.000 followers. Additional points were awarded to the teams that had a news page created by the social network with a minimum number of 100.000 followers.

Winners Of This Section Were:

*Barcelona,
Manchester
United
&
Real Madrid*

teams with a high number of 'celebrity footballers' and with exceptional efforts in offline promotion such as summer tours and grass roots programs in China. At the other end of the spectrum, teams such as Manchester City and Tottenham presented lower scores for varying reasons, for example their relative youth in the Chinese online market.

Figure 5:
Popularity measured through the number of fan pages with over 10.000 fans and network run news pages with over 100.000 fans.



OVERALL SCORE REVIEW

Despite the different and varying efforts of each club to make their mark in China, it appears the end results are as expected. If we compare our final scores with the UEFA official rankings, you will see a very similar pattern, especially with the first 4 clubs. Some might argue that this is simply because the Chinese follow success, which may be the case, however it is also true to say that these top clubs are the ones investing most heavily in their China strategy and making a strong commitment to their fans in the far East.

Overall Score Review



Figure 6: Official UEFA Rankings vs Red Card league table



WHAT DOES LOCALIZATION MEAN?

Adapting communication to target a specific cultural audience goes beyond simple translation. To effectively connect with a Chinese fan requires a well thought out content plan that does not simply match what is posted on Facebook/Twitter and a moderation process, which takes into account China's political/cultural sensitivities.

That's why this study rewarded those football clubs that demonstrated exceptional efforts in engaging directly with a Chinese audience.

2012 SPORTS WEIBO HIGHLIGHTS

Forwarded
14,711
times

Spain wins the Euros 2012



Forwarded
7,673
times

Chelsea wins the
Champions League



SOME OF THE HIGHLIGHTS OF THIS RESEARCH:



Image 1:
Arsenal Chinese instrument Video



Image 2:
Tottenham Hotspur Welcome Video

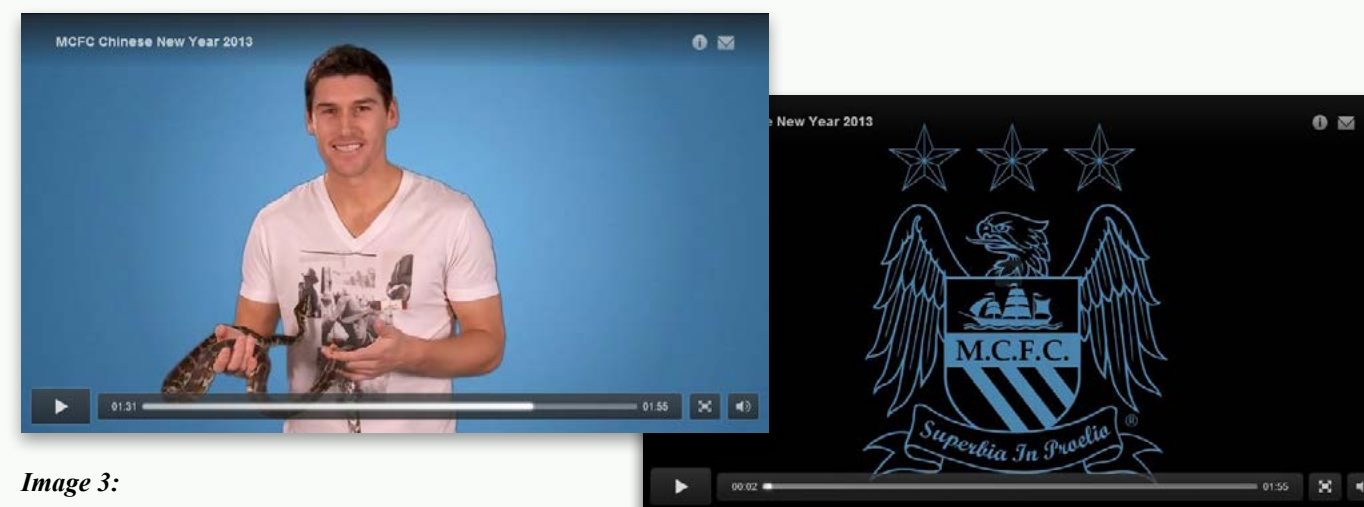


Image 3:
Man City holiday greetings Video



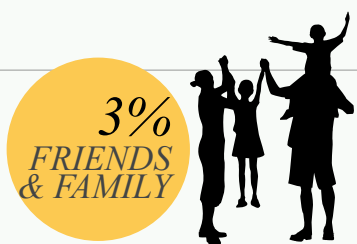
WHAT MOTIVATES CHINESE FANS?

Figure 7:
Why do you follow
a team on Sina
Weibo?

40%
SUPERSTAR
PLAYERS



14%
OTHERS



1%
VISITS TO
CHINA



There are several reasons involved in the choice of a football fan to support and to follow a club on social media. From friends and family suggestions to a team's success in the league, motivation varies for each fan. This research found evidence to state the top reason for social media users to follow a team is the presence of 'celebrity footballers'.

It has been demonstrated that popular footballers – such as

*David Beckham,
Lionel Messi
&
Cristiano Ronaldo*

drive 40% of Chinese fans to follow a specific team. This is further demonstrated by the popularity of these footballers' individual pages, for example Messi's 14m online Sina Weibo fans.

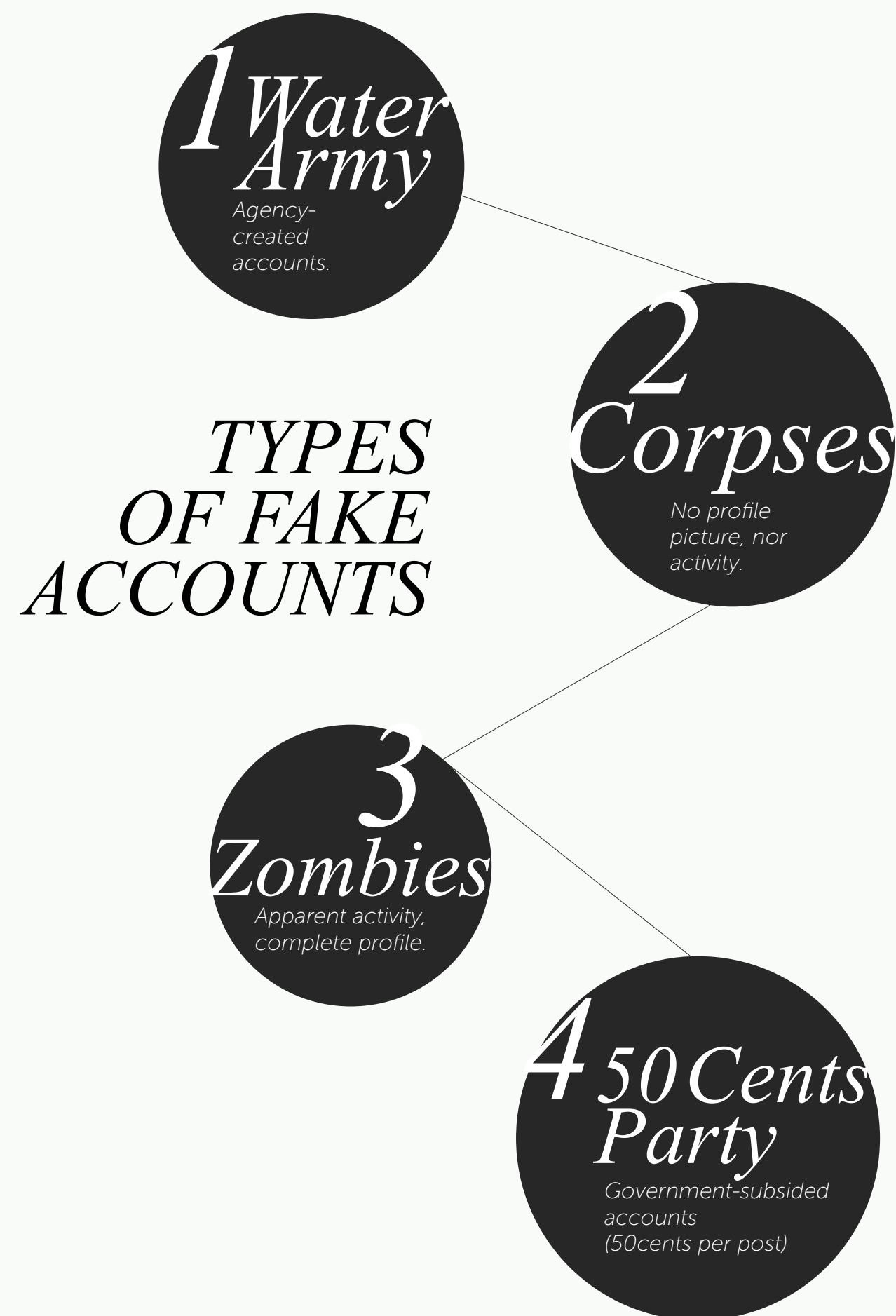
As shown in figure 7, another 26% of fans consider performance in the league as the main reason to follow a team's page. Chinese social media users, defined as 'glory supporters', often follow multiple teams at the same time, shifting their loyalty according to clubs' success on the pitch. Indeed, there is some symmetry between the clubs' total follower numbers and their official UEFA ranking (as shown on p.17).



THE RISKS OF LOW ENGAGEMENT

Low engagement scores, as presented by Chelsea and Man City, might suggest the presence of the so-called fake fans, a known issue in Chinese social media management.

Although difficult to identify, fake fans might pose a danger to a club's online reputation and overall digital performance. Moreover, a large number of inactive accounts might create a illusion of ROI and of the authentic size of an online fan base. Notable on this matter is the case of QZone, often mistaken as the largest social network in China.



ENGAGEMENT: SINA VS TENCENT

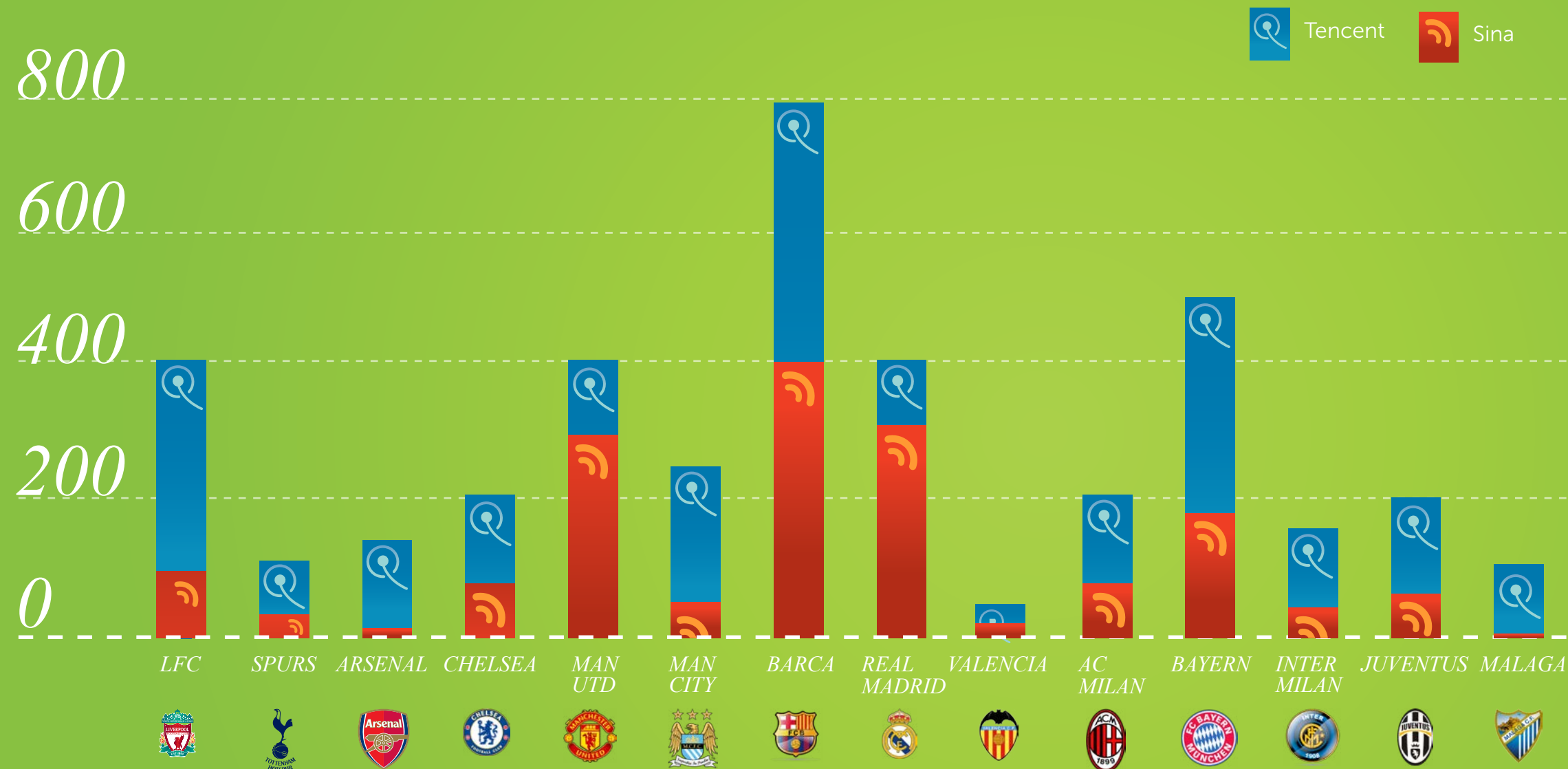


Figure 8:
Average number of forwards
and comments on Sina and
Tencent Weibo

Preliminary analysis of fan engagement on the club's pages would suggest a higher engagement rate on Tencent, on average up to

1.5 times
higher than on Sina.

However, a closer analysis of the two networks shows Sina Weibo users are much more inclined to become part of online conversations.

Results have demonstrated that Tencent users are

8 times
more likely to forward posts than to comment them.

On the other hand, Sina users will forward a post only

1.4 times
more than comment it.



FOLLOWERS NUMBERS VS ENGAGEMENT RATE



The data analysed demonstrated an inverse proportion between the growth of a page's followers and the engagement scores. As you may see from the two extremes of this graph, where follower numbers are low, engagement is high. Take for example

Man Utd

where followers numbers grow, engagement decreases – also shown by Man City or Chelsea at the other end of the spectrum.

Other teams such as Liverpool and Arsenal presented a more balanced followers/engagement ratio. These results may confirm the theory of contaminated ROI, where a large number of fans might not necessarily lead to an increase in online conversation.

Figure 9:
Followers
numbers vs
engagement
rate



UNEXPECTED DEMOGRAPHICS: GENDER

Figure 10:
Gender
demographic
across the 14
teams analysed.



The data collected demonstrated surprising findings in terms of demographics. Over

30%

of the active football fans we considered were female, as you can see from **Figure 10**.



Image 6:

Liverpool capitalized on this statistic by running an online campaign exclusively for their female fans, encouraging them to pose wearing a football jersey and send in the pictures for a chance to win.

There are several reasons we identified to explain this interesting statistic. Firstly, the tendency of Chinese fans to watch football games at home via video streaming sites rather than in bars. Sport viewing has become an opportunity for a family/friend gathering, rather than a night out.

An equally important factor that drives female Chinese fans to follow the sport is of course the 'sex factor'. As mentioned earlier, celebrity players are the driving factor as to why fans watch football, even more so for the female demographic. It is these 'attractive football stars' that have been identified as the central motivation to support a team, and their depiction in China as 'Western idols'.



MORE ABOUT RED CARD

The 2013 China Digital Champions League 'Red Card' offers a comprehensive review of the top European clubs digital performance within Greater China. The report is assessed with no bias towards any pre-existing relationship or particular club. Insights gained should offer the reader a greater understanding of trends, motivations and opportunities international football clubs have within China.

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MORE ABOUT MAILMAN



More About Red Card & Mailman

Established in 1999, we pioneered many of China's early media & advertising initiatives. Today, Mailman supports global football clubs & sports personalities in developing their brand in China through social media, whilst creating partnerships with Chinese consumer brands.



As special thank you to Mailman Group team members David Hornby, Giulia LaPaglia, Sally Wang, Shirleen Wong and Tiffany Chen for working tirelessly to complete this report.



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