FOOTBALL CLUBS & CHINESE SOCIAL MEDIA

RED CARD 2014

The China Digital Champions League

Produced by Mailman Group

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RED CARD 2014

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.

2013

40

30

20

10

BARCELONA 1
MANCHESTER UNITED 3
BAYERN MUNICH 2
REAL MADRID 4
LIVERPOOL 18
ARSENAL 6
INTER MILAN 8
CHELSEA 5
AC MILAN 13
JUVENTUS 24
MANCHESTER CITY 19
TOTTENHAM HOTSPUR 28
MALAGA 62
VALENCIA 9

Overall Red Card Scores

UEFA Official Rankings 2013

Official UEFA Rankings vs Red Card league table

OVERVIEW OF INDUSTRY

China's Population
1,350,000,000

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:

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

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.

TIMELINE OF CLUBS IN CHINA

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

2010

Jul.	Liverpool launch Sina Account
	Liverpool China Tour

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

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

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.
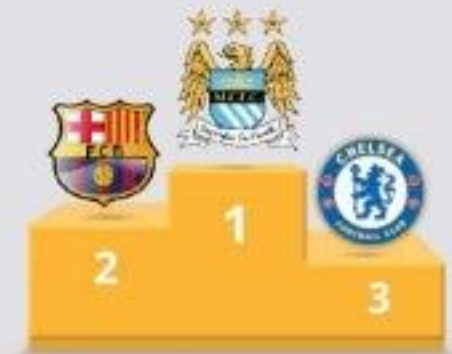
Largest Fan Base
The stand out winner of this category is Manchester City who far outstrip all of their rivals.
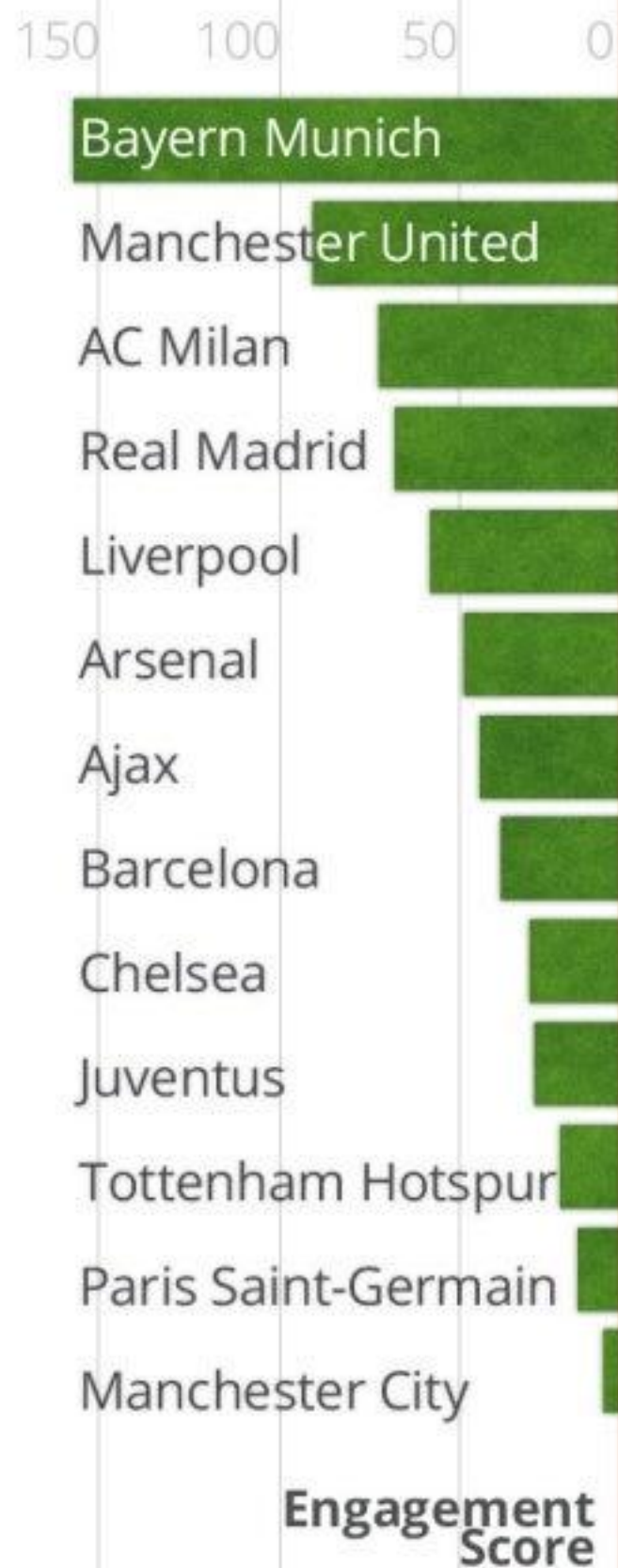
Smallest Fan Base
The lowest scorers in this category are Ajax and PSG, highlighting the fact that they are unable to leverage the pre-existing reputations of other teams from their domestic leagues.

10m

7.5m

5m

2.5m

0

Manchester City

Barcelona

Chelsea

Real Madrid

Liverpool

Arsenal

Bayern Munich

Manchester United

AC Milan

Ajax

Tottenham Hotspur

Juventus

Paris Saint-Germain

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.

Engagement Score

150   100   50   0

Bayern Munich
Manchester United
AC Milan
Real Madrid
Liverpool
Arsenal
Ajax
Barcelona
Chelsea
Juventus
Tottenham Hotspur
Paris Saint-Germain
Manchester City

Average fwds/comms per post

Bayern Munich
Manchester United
Real Madrid
Liverpool
AC Milan
Arsenal
Barcelona
Chelsea
Juventus
Ajax
Tottenham Hotspur
Manchester City
Paris Saint-Germain

0   100   200   300

OFFICIAL PRESENCE

1

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:

4   3   2   YOUKU优酷 1

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.

Number of Official Channels

4 — Clubs with Four Channels

1 — One Channel

2 — Three Channels

3 — Two Channels

3 — Five 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.
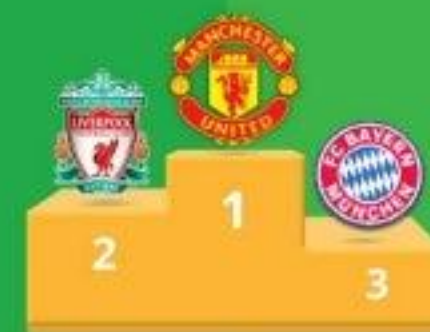
BUZZ

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'**.

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

40000 Mentions

30000

20000

10000

0

Manchester United
Liverpool
Bayern Munich
Arsenal
Real Madrid
Barcelona
Chelsea
Manchester City
AC Milan
Tottenham Hotspur
Juventus
Ajax
Paris Saint-Germain

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.
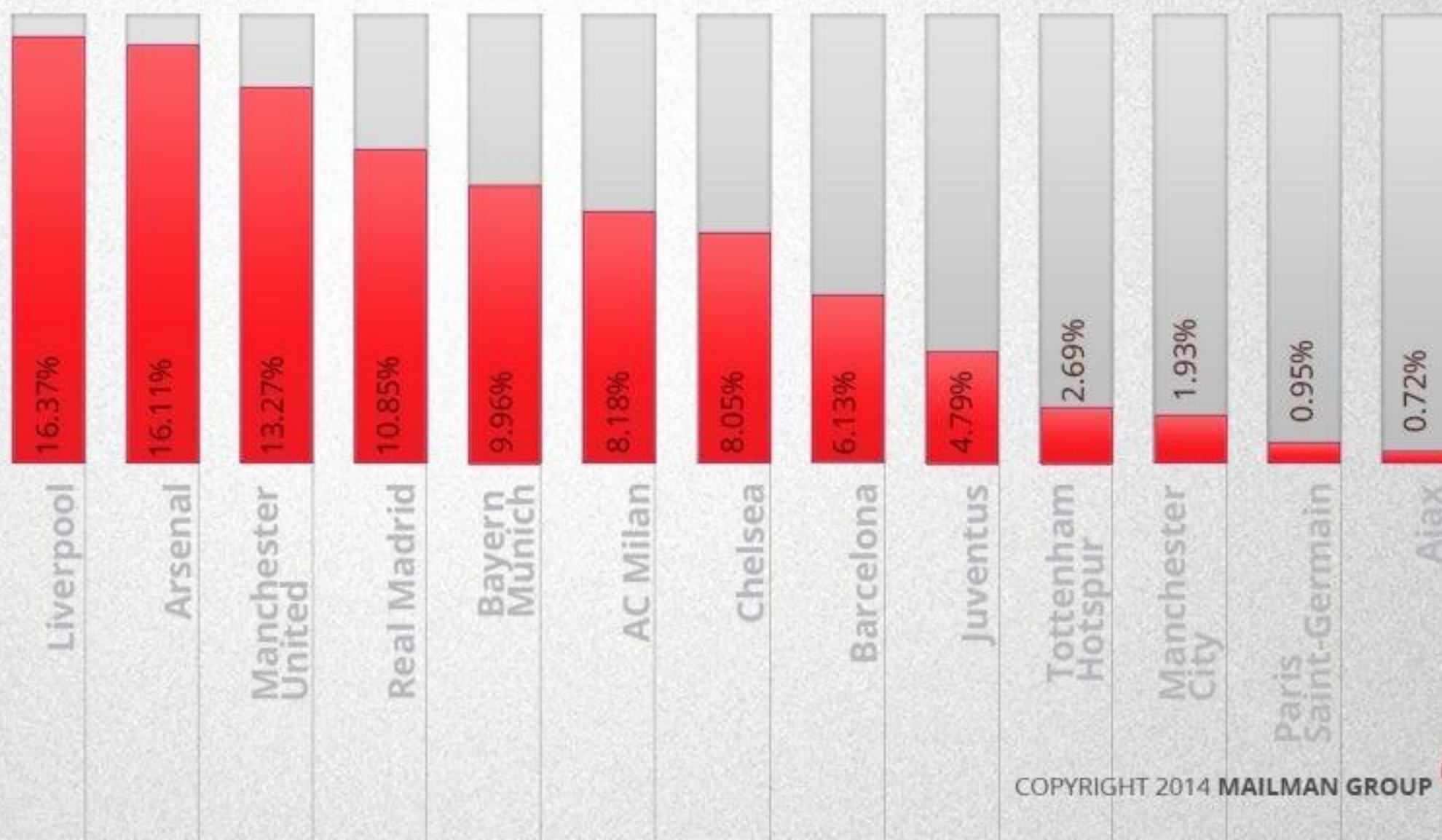
HUPU SPORTS FEATURE

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 independant 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.

Club	%
Liverpool	16.37%
Arsenal	16.11%
Manchester United	13.27%
Real Madrid	10.85%
Bayern Munich	9.96%
AC Milan	8.18%
Chelsea	8.05%
Barcelona	6.13%
Juventus	4.79%
Tottenham Hotspur	2.69%
Manchester City	1.93%
Paris Saint-Germain	0.95%
Ajax	0.72%

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.

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?'

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.

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)

4th March:

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

1st May:

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

8th May:

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

16th May:

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

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)

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.

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

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

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 Hotpur** 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.

TOTTENHAM HOTSPUR & AIA BOSIDENG LONDON

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 overwhelming recipients of these sponsorship deals have been Chinese Super League teams, with 2013 colminating 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.

The current trend is investment in **'football ambassadors'**, where top European players sign up to represent local brands within China as the face or 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.