RED CARD 2015

China Digital Champions League

Produced by Mailman Group

#RedCardChina

MAILMAN

EDITOR'S NOTE

Global Teams, Made in China

It was 2011 when the first global football team, Liverpool FC, launched an official presence on China's social media. A team rich in history, culture and identity, the club demonstrated to the wider football community the appetite for European football was there.

Fast forward 4 years and we now see more than 30 active teams across China's social media and video networks. It's no longer Europe's elite making an impact, we're now seeing teams competing for fan mindshare from all regions of Europe. Teams have quickly realised that China is a key component of becoming a global team.

There were a number of winners in the Red Card 2015. German football was again a big winner with the launch of the official Bundesliga Weibo and the national team's success at the World Cup both proved to deliver value for the German teams online. We saw Borussia Dortmund and Schalke 04 amass over 1,000,000 followers in under a year on Weibo platforms, whilst Bayern Munich continued their strong growth as a fan favourite.

The relationship with winning and fan development is no more prevalent than in China, where many fans support multiple teams without the direct attachment to location or family upbringing. Real Madrid were the real winners here by not only seeing success on the pitch in the Champions League but topping our Red Card 2015 league table as China's most reputable football team across the digital landscape. Star players, success and broader reach across China's online eco-system has allowed the club to develop relationships well beyond tier 1 cities.

Digital media in China also saw several changes. The technology giants Tencent and Sina continued to compete for top spot amongst social users, Tencent's WeChat became the most significant platform for teams to explore as Sina Weibo, whilst still remaining a major source of news, had to settle for a more passive form of engagement as users now spread their time across both platforms. WeChat has seen teams such as Liverpool, Arsenal and Bayern Munich all develop rich social followings on the network.

So what does it all mean for 2015? This year we expect to see Weibo and WeChat stabilise their positions in the market, the new short form video network Weishi is sure to spark the interest of many top clubs and online commerce will see more teams establishing official stores - now wanting to cash in on the social footprint. With tours in the summer for many clubs, digital will play an increasingly important role in securing commercial deals in China. The demand for rich, integrated media and sponsorships will create new deal opportunities for progressive football clubs.

Andrew Collins
CEO, Mailman Group
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INDEX

01. Introduction

02. Methodology

03. Final Standings

04. Followers

05. Engagement

06. Mentions

07. WeChat

08. Website

09. E-commerce

10. Video

11. Winners Circle

12. Biggest Movers and Shakers

13. 2014 Highlights

14. China's Big League

15. National Teams

16. Weibo XI

17. Tmall

18. CSL Business Value

19. Sign up for a free brand report

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INTRODUCTION

Mailman is a leading sports and entertainment consulting group in China with expertise in social media, fan development, commercial partnerships and sports brands development.

View the Red Card 2013 >
View the Red Card 2014 >
View the Red Card Christmas Special >
Learn more about Mailman Group >

#1

The Red Card, China Digital Champions League is the #1 sports digital report in China, and this year takes a far more comprehensive analysis of the top European clubs online in China.

The results revealed in this year's Red Card were taken between November 11th, 2014 and January 11th, 2015 and reflect the current performance of the top European clubs online on Chinese digital media.

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METHODOLOGY

The data from the Red Card 2015 was collected from November 11th to January 11th. We assessed European clubs in China with over 1 million followers over 7 core competencies to provide a detailed analysis of their digital strengths and weaknesses.

Engagement

A club's average engagement is the combined forwards, comments and likes per Weibo post over a 60 day period.

A club's average engagement is the combined forwards, comments and likes per Weibo post over a 60 day period.

20 = 5pts
20 - 40 = 10pts
40 - 60 = 15pts
60 - 80 = 20pts
80 - 100 = 25pts
100 - 150 = 30pts
150 - 200 = 35pts
200 - 250 = 40pts
250 - 300 = 45pts
300 + = 50pts

Followers

Clubs were ranked based on their overall number of Sina & Tencent Weibo followers.

Points were awarded according to the median number of online fans to ensure parity, with 80% of teams below 5m followers.

1 - 1.5m = 10pts
1.5 - 2m = 15pts
2 - 2.5m = 20pts
2.5 - 3m = 25pts
3 - 4m = 30pts
4 - 5m = 35pts
5 - 7m = 40pts
7 -10m = 45pts
10m+ = 50pts

WeChat

There were two factors taken into account for this category:
1. an active WeChat presence
2. the average number of daily reads.

Clubs scored 10 points for having an active account and 1 point per 1,000 daily reads.
*WeChat follower numbers are private.

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METHODOLOGY

Website

10 points were awarded to a club with an official Chinese language website.

E-commerce

Over the course of 2014, several clubs launched official China online stores, awarding points based on the strength of their eStore.

Tmall is the number 1 B2C retail platform in China, therefore we awarded 10 points for an official presence.
Teams with an alternate Chinese language store scored 5 points.

Buzz

Online exposure is calculated according to the number of Sina Weibo mentions of each team across the whole network.

A mention is defined as a post containing the club name and a specific football keyword.
1 point was awarded per 1,000 mentions.

Video

There are two key video platforms in China currently utilized by professional football teams: Youku and Weishi.

5 points were awarded to a club with a verified video channel, with 10 points awarded if a team is active across both platforms.

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FINAL STANDINGS

	Club	Followers	Followers Score	Engagement	Buzz	WeChat	Website	E-commerce	Video	Total
1.	Real Madrid	4M	35	45	40	15	10	5	0	150
2.	Barcelona	7.6M	45	45	35	0	10	5	0	140
3.	Bayern Munich	4.4M	35	50	23	20	10	0	0	138
4.	Manchester United	13M	50	35	36	0	10	5	0	136
5.	Liverpool FC	3.3M	30	25	23	20	10	5	10	123
6.	Arsenal	4.6M	35	20	24	20	10	10	0	119
7.	Manchester City	9.6M	45	15	18	11	10	5	5	109
8.	Chelsea	3.9M	30	20	23	0	10	5	0	88
9.	Tottenham Hotspur	2.2M	20	10	5	11	10	0	10	66
10.	Paris Saint-Germain	1.5M	15	10	2	11	10	5	5	58
11.	Borussia Dortmund	1.1M	10	30	11	0	0	5	0	56
12.	AC Milan	2.1M	20	10	5	0	10	5	0	50
13.	Schalke 04	1.1M	10	15	4	10	10	0	0	49
14.	Juventus	1.8M	15	5	9	0	10	0	0	39
15.	Ajax	1.2M	10	5	2	0	10	0	5	32

FOLLOWERS

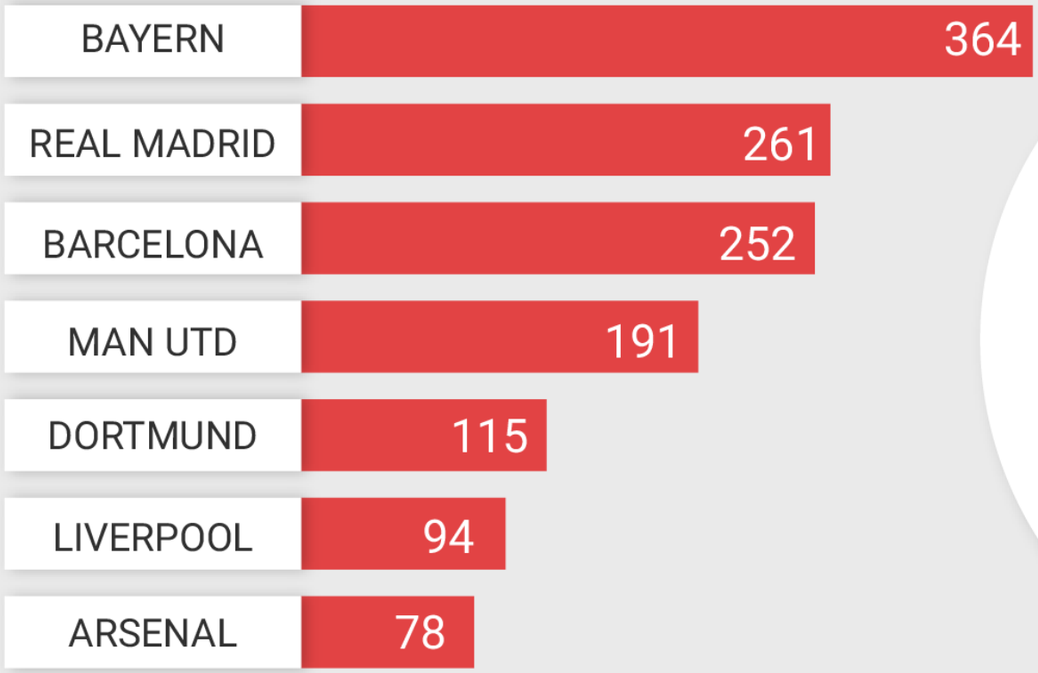
The number of Weibo followers provides the most basic measurement of a club's popularity online in China. We included the number of online fans from both of China's top micro-blogging platforms: Sina and Tencent Weibo.

Manchester United increased their online fan base by 11 million new followers this year, demonstrating the power of a global football brand.

Despite finishing 2nd, **Manchester City** experienced by far the lowest growth of any team with only 30,000 new followers this year.

*Total WeChat followers are not included in the popularity category due to the numbers being private.

ENGAGEMENT



The second and most important category included in this report is a club's online engagement. The engagement of a club reflects the level of direct communication with active fans. We track the likes, forwards and comments of each team to measure the average number of interactions per post.

The 'like' button was only fully integrated into Weibo accounts early in 2014 and has changed the way that users interact with club accounts online. 'Likes' make up ~50% of a club's daily engagement, with fans 3 times more likely to 'like' a post than to share it.

Bayern Munich boasted by far the highest engagement level largely due to their active and vocal Chinese supporters clubs. Several factors contributed to their dominance in this category: Germany's World Cup victory, the powerful support from the **Bundesliga** in China and the club's recent high profile success in Europe.

At the opposite end of the spectrum, **Juventus** are current Serie A champions yet have an average engagement of just 9, showing that success on the pitch does not guarantee online popularity in China.

Chinese fans are traditionally drawn to the underdog as they tend to demonstrate values which are respected in Chinese culture. This is highlighted by **Borussia Dortmund** who achieved the highest engagement level relative to their followers. The club's powerful relationship with their fans, best demonstrated by the world-renowned Westfalenstadion atmosphere, is a key factor of their success as this is highly valued by the Chinese.

BUZZ

*1 point is equivalent to 1,000 Sina Weibo mentions.

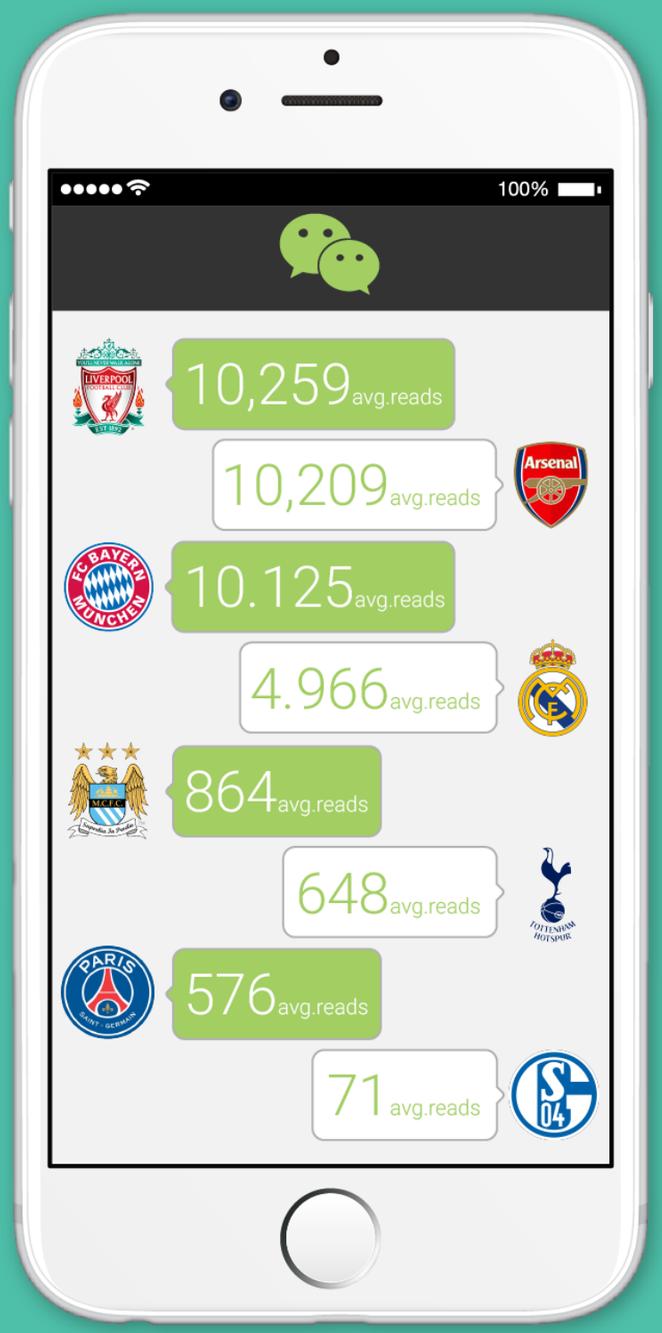
'Buzz' refers to the number of organic discussions taking place across the entire Weibo network, including conversations outside of a club's official channel. By tracking the number of football related posts from all Sina Weibo users and scanning for specific keywords, we gained a credible understanding as to the level of online exposure per club. Our listening tool trawled Weibo over a 60 day period. Any post that mentioned a team's name and a football related keyword was pulled into our database.

Real Madrid had the highest level of 'Buzz' with over 40,000 mentions per month. The club's 2014 Champions League victory generated enormous online exposure and media attention, benefiting from China's obsession with this tournament.

It's common in China to support multiple teams, often from different European leagues, therefore we ran a study to determine who is 'China's second favorite team'. To further back their claim as the most talked about team online, **Real Madrid** also finished first in this survey with over 17% of the votes.

WECHAT

WeChat is China's fastest growing social network with over 500 million active monthly users. 8 of this year's Red Card teams have established an official presence on this platform, with **Real Madrid** and **Schalke 04** the most recent additions.



Liverpool topped the list as the most viewed club on WeChat, beating **Arsenal** and **Bayern Munich** by a small margin. **Real Madrid**, due to their highly irregular posting schedule have less than half the readership of the top three clubs.

WeChat has slowly opened up as a social platform with fans now able to share, comment and like a club's posts. In addition, previously private data has been made public, most notably the number of **daily article reads** which provides a clear indication of each club's influence on this platform.

Barcelona were the first European team to launch a **bi-lingual** WeChat account in September 2014 with the first indication that WeChat is becoming a global platform. However, in just over a month, their account became inactive leaving their WeChat fan-base empty handed.

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WEBSITE

A Chinese language website has become an increasingly important means of communication with fans in China, acting as the hub for all content and club activity in the region.

Borussia Dortmund
are the only club
that does not have a Chinese Website

E-COMMERCE

China's e-commerce sector exploded in 2014 with over $2 trillion USD in transactions, an annual growth of 25%. This figure includes all online sales from e-commerce giants such as Tmall and JD, as well as B2B transactions. Clubs have been cautious to develop official online stores in China due to the dominant grey market, however there is an increasing demand amongst Chinese football fans to buy authentic products direct from the clubs themselves.

Arsenal became the first club to register an official store on Tmall, the most popular online retail platform in China.
Bayern Munich, Red Card 2014 champions, are one of only five teams featured in this report without a Chinese language online store, despite having a China website.

The other 9 clubs manage their e-commerce presence in China via third party agencies. On the surface, these alternatives to Tmall allow clubs to localize the language and accept Chinese payment methods, however do not solve the problems of high postage costs and slower delivery speeds.

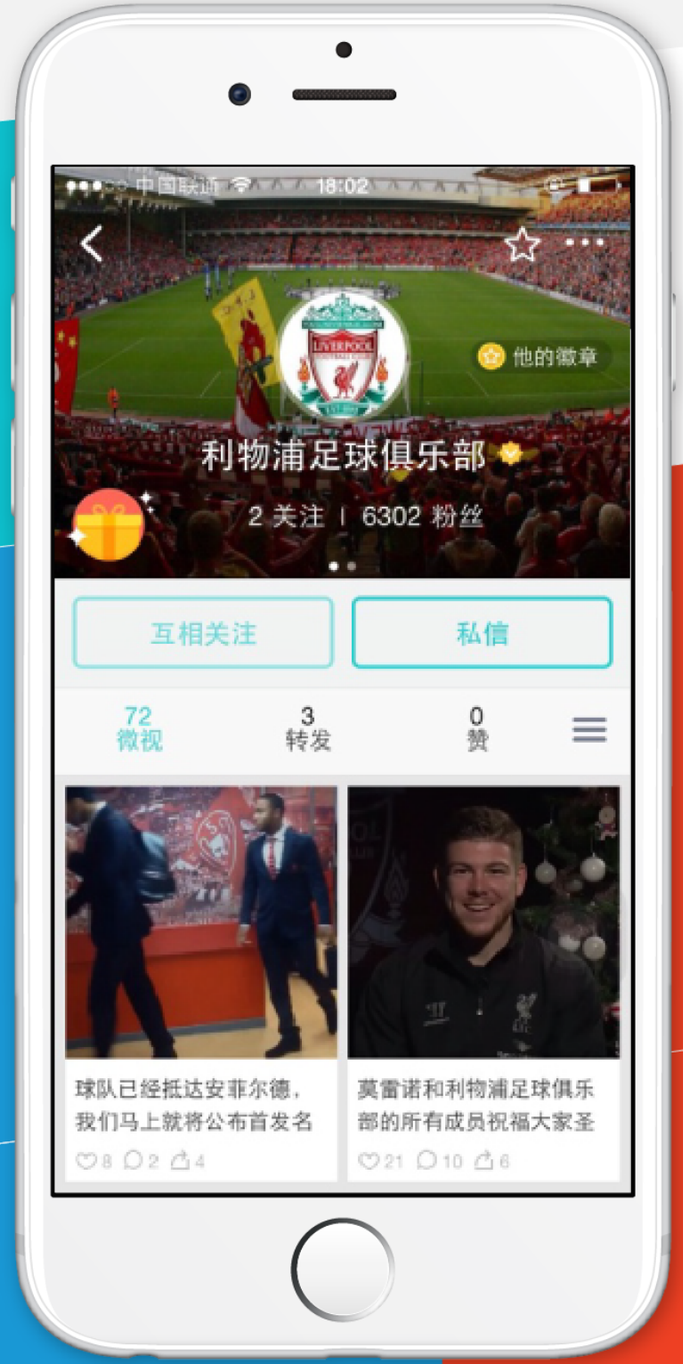
The overwhelming advantages of using Tmall include reduced delivery fees, Chinese consumers' familiarity with the platform and fast delivery speeds. Clubs also benefit from Tmall's powerful promotional resources leading to major brand awareness and a huge volume of referral traffic.

*~~**Tottenham Hotspur**~~ are launching their official Tmall store in February 2015.

VIDEO

A new video platform rose to prominence in 2014, adopting an almost identical model to Vine. **Weishi** allows clubs to engage with their fans through short form video content, highly popular amongst Chinese fans. One Weishi feature unavailable on Vine is the ability to promote 8 second clips from longer videos, directing traffic back to a club's official video channel.

Liverpool and **Tottenham Hotspur** became the first clubs to open a presence on this video network: joining the NBA as the most followed official sports accounts.



YOUKU 优酷

Youku is one of the longest-standing Chinese social platforms as a direct equivalent to YouTube. Clubs can register an official channel to host all their video content and act as a social sharing hub. Five teams: **Ajax**, **Liverpool**, **Manchester City**, **Tottenham Hotspur** and **PSG**, have an official and active Youku video channel.

Tottenham Hotspur are the real winners here, with the most engaged video channel of any club on the table.

Chinese internet users are 90% less likely to subscribe to an official Youku channel when compared to their Western counterparts on YouTube.

WINNERS CIRCLE

Red Card 2015 Champians

Real Madrid
150 points
#1 UEFA Ranking

Barcelona
140 points
#2 UEFA Ranking

Liverpool
123 points
#41 UEFA Ranking

Bayern Munich
138 points
#3 UEFA Ranking

Manchester United
136 points
#10 UEFA Ranking

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BIGGEST MOVERS & SHAKERS

FROM 4th TO

1st

Real Madrid climbed from 4th place last year to the top of the Red Card 2015. Highlighting the importance of Champions League success in China, for the 2nd year in a row the victors of this competition also claimed top spot in the Red Card Index. The key factors behind their digital success include launch of an official WeChat channel, their focus on sharable fan content (2nd highest engagement) and their strong ties with Chinese media which propelled them to the #1 most talked about club online. To further support their final standing, Real Madrid were also voted Chinese fans' favorite 2nd club in an online poll.

FROM 9th TO

13th

AC Milan dropped from 9th to 12th in this year's Red Card being surpassed by several of their competitors. With an annual follower growth of only 16%, the second lowest of all teams in this year's Red Card, and the third lowest level of engagement, it is clear that a team cannot rely on their reputation alone. **AC Milan** are one of only two teams without an officially verified club presence on Sina Weibo, the number 1 social network in China, and also are yet to launch on WeChat. This presents a clear opportunity for the club to make the most of the evolving digital media landscape in China, and close the gap on their European rivals.

13

#2014 HIGHLIGHTS

11th May
Premier League Finale
4,500+ engagement

17th May
FA Cup Final
3,900+ engagement

24th May
Champions League final
9,100 engagement

24th June
Suarez bite
5,500 engagement

8th July
Germany 7 - 1 Brazil
13,100 engagement

13th July
World Cup final
13,000 engagement

Big 4 Summer Transfers
10,700 engagement

16th November
Tottenham Hotspur and Inter Milan China TV Series

THE BIG LEAGUES

Three of the major European football leagues have an official presence online in China:
the **Premier League**, **Bundesliga** and **La Liga**.
To measure the level of influence each has over Chinese fans,
the leagues were assessed according to the strength of their Weibo and WeChat channels.
Having the support of an official league account is a major boost for the clubs in each respective country,
and is a deciding factor for new football fans when selecting which club to follow.

BUNDESLIGA

LIGA BBVA

PREMIER LEAGUE

BUNDESLIGA

Despite launching later than the Premier League, the **Bundesliga** account has successfully engaged with it's fans and interacted with the 7 active Bundesliga clubs online. The Bundesliga has the highest average engagement of the three leagues on Weibo and the highest number of reads on WeChat.

79
AVG. ENGAGEMENT

10,300
MENTIONS (OVER 30 DAY PERIOD)

1,300
AVG. DAILY WECHAT READS

1,026,000
FOLLOWERS
11th JANUARY 2015

LAUNCH
2nd JULY 2014

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LA LIGA

Having been inactive for almost 9 months of 2014, **La Liga** has failed to achieve a similar level of success of the the Spanish clubs online in China. Despite having the second highest number of mentions, their low engagement reveals their lack of understanding of Chinese fans, and is highlighted by La Liga being the only league to be without a WeChat presence.

9

AVG. ENGAGEMENT

11,700

MENTIONS (OVER 30 DAY PERIOD)

NO WECHAT ACCOUNT

471,000

FOLLOWERS

11th JANUARY 2015

LAUNCH

10th January 2012

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PREMIER LEAGUE

The Premier League, who also has an official Chinese website, has the highest number of followers and mentions of the three leagues online. They benefitted from La Liga's period of inactivity, to become the dominant league account online and have strong interaction with the seven premier league clubs online, with all but one competing in Europe's top competitions

44
AVG. ENGAGEMENT

20,300
MENTIONS (OVER 30 DAY PERIOD)

850
AVG. WECHAT READS

2,320,000
FOLLOWERS
11th JANUARY 2015

LAUNCH
16th August 2013

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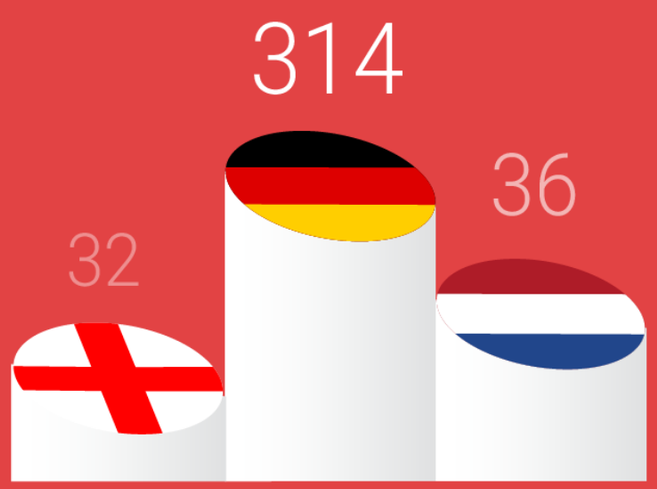
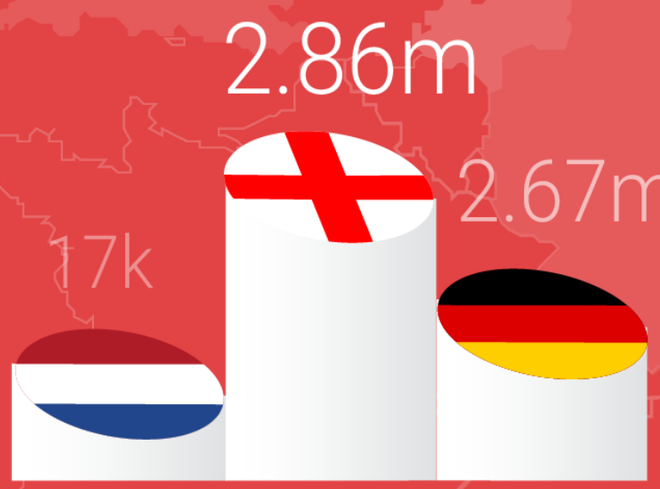
NATIONAL TEAMS

The popularity of European football online in China this year extended beyond domestic clubs, with national teams becoming the focal point of China's media attention during this summer's World Cup. Mailman took a look at how the top three most active national teams competed on Weibo: Germany, England and the Netherlands.



AVG. ENGAGEMENT

MENTIONS



FOLLOWERS

Victory for **Germany** in this year's World Cup was a major boost to their online popularity in China, ensuring their status as the number one national team on Weibo. Success on the pitch boosted their level of followers by almost 75% over the tournament. The DFB Weibo page has been supported by the Bundesliga official account, acting as a springboard for the launch of several new Bundesliga clubs.

After being eliminated in the quarter-finals, the **Belgian** FA appeared to give up on their China presence having been inactive ever since.

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“

40% of fans follow a team online because of their star players

”

-Red Card 2014

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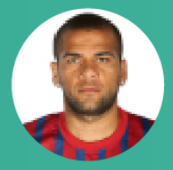
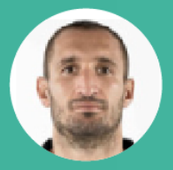
WEIBO XI

Neuer
1.06M

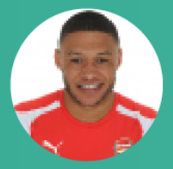


Dani Alves
0.95M

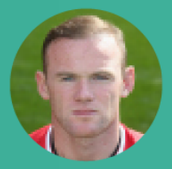
Pique
3.21M



Chiellini
1.66M



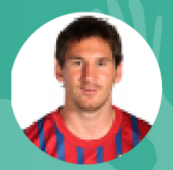
Chamberlain
1.26M



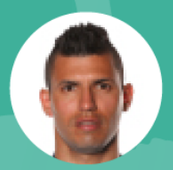
Rooney
3.20M

Iniesta
3.20M

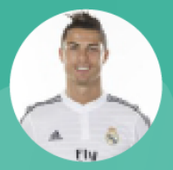
Kaka
2.32M



Messi
20.00M



Aguero
1.29M



Ronaldo
11.50M

The top 10 players online have 49 million total followers combined, compared to 53 million followers for the top 10 clubs online, proving how important players can be in driving follower growth. The **Premier League** is the most represented league in China with 20+ players online, whilst **La Liga** and Serie A both have 8. There are 3x more attacking players active online, highlighting a preference for goal scorers. The #1 reason for a player to launch an individual presence in China, is to increase the chance of commercial success in the region by building a strong personal following.

- **Lionel Messi** has more Chinese online fans than the total following of all 6 Spanish clubs combined.
- The authenticity of a player's Weibo account is vital to its popularity. Key factors in maintaining this credibility include the time of posting, the language used and the frequency of interaction with fans.

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TMALL

Tmall is China's #1 online retail platform. Owned by the Alibaba group, Tmall became an independent platform in 2011 after launching as the B2C arm for Alibaba's Taobao. So far, Arsenal are the only team with an officially registered Tmall store.

5 advantages of Tmall:

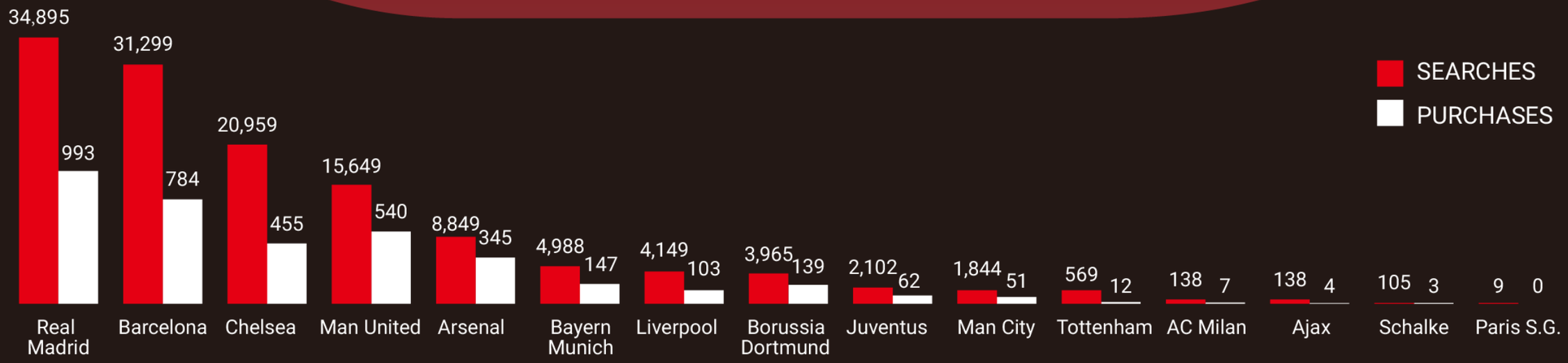
- Low postage fees
- Faster delivery speeds
- Localized customer service
- Local payment integration
- Consumer's familiarity with the platform

We collected data from Tmall over a seven day period during the first week of the football transfer window to see who was the most searched club and which team had the highest number of purchases.

Red Card 2015 winners, **Real Madrid**, were the most searched for club on Tmall with almost 1,000 purchases made in 7 days.

Of the 15 clubs analysed, the most popular purchases were priced at RMB 130 (€ 18), significantly lower than the average cost of an official team jersey (~RMB 500 = ~€ 71).

*Statistics provided by KungFu Data, a private e-commerce intelligence service for foreign brands selling in China.



CHINESE SUPER LEAGUE BUSINESS VALUE

LEAGUE

270,000,000

RMB

net income of the the CSL in 2014

- The average attendance of CSL fixtures was over 18,500, **#1** in Asia and inside the top 10 in the world.

CLUBS

2,000,000,000

RMB

total revenue of all clubs in 2014

- The highest percentage of investors is from **FMCG** and retail organisations with 35%, while finance and real estate are at 17% and 15% respectively.

PLAYERS

470,000,000

RMB

spent on transfers in 2014

- The salary of a player has maintained it's year-on-year increase of more than **20%**, a consecutive trend since 2011.

網易 NETEASE
www·163·com

All statistics were provided by Netease Media Technology

A WORD FROM THE FANS

What is the single most important thing for a club to consider when launching online in China?

"Clubs need to put the fans first, then they can think about financial gains."

Jimmy Lee (Chelsea Fan)

How much does a club's success on the pitch impact their online popularity?

"Success on-the-pitch is the #1 reason for new fans to follow a team, however is by no means the only factor. Clubs who are most active in their interactions with Chinese fans have the best chance of building a loyal fan base. Chinese fans want to be appreciated by their club."

Ruofu Zhu (Tottenham Hotspur Fan)

What do you expect for 2015?

"Teams to make a push for e-commerce and summer tours to China."

Yujun Wu (Schalke 04 Fan)

Are European clubs more popular than the Chinese?

"Yes, because of 5 reasons: star players, club history, quality of football, stadium atmosphere, and less corruption."

Ke Ke (Manchester United Fan)

How common is it to change the teams that you support?

"The new generation of fans may change season by season, but the older generation will only support one team, although they may follow another from a different league."

Freddie Zhao (Arsenal Fan)

How do you see the popularity of the Chinese Super League growing over the coming year?

"Fans are definitely more interested in the CSL, but it has not yet reached the heights of the European leagues."

Vincent Chan (Liverpool Fan)

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19

Thank you for reading the Red Card 2015

Special thanks to the Mailman team for their outstanding work over the last 3 months in putting together this report. In particular:

David Hornby | Tom Elsden | Fergus Jordan | 凤雅 | Brian van Damme | 林忠卫

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