RED CARD
2013 China Digital Champions League
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.

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.
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).

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.
## METHODOLOGY

<table>
<thead>
<tr>
<th>Categories</th>
<th>Metrics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TOTAL FOLLOWERS</strong></td>
<td>Listed as the official club account OR most popular club branded account.</td>
</tr>
<tr>
<td><strong>OFFICIAL PRESENCE</strong></td>
<td>Defined as a fan page authorized and supported by the official UEFA club.</td>
</tr>
<tr>
<td><strong>ENGAGEMENT RATE</strong></td>
<td>Average number of forwards (retweets) and comments over an average 50 consecutive posts.</td>
</tr>
<tr>
<td><strong>LOCALIZATION</strong></td>
<td>Percentage of content translated in Mandarin (simplified Chinese) and of content directly targeting the Chinese fans. BONUS: Points awarded for China specific communication.</td>
</tr>
<tr>
<td><strong>POPULARITY INDEX</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

### CLUB

<table>
<thead>
<tr>
<th>Club</th>
<th>Total Followers</th>
<th>Official Presence</th>
<th>Engagement</th>
<th>Localization</th>
<th>Popularity Index</th>
<th>Total Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>BARCELONA</td>
<td>2m</td>
<td>Y</td>
<td>-3</td>
<td>4</td>
<td>14</td>
<td>38</td>
</tr>
<tr>
<td>MAN UTD</td>
<td>400k</td>
<td>N</td>
<td>17.5</td>
<td>n/a</td>
<td>15</td>
<td>36.5</td>
</tr>
<tr>
<td>BAYERN MUNICH</td>
<td>700k</td>
<td>Y</td>
<td>13</td>
<td>4</td>
<td>6</td>
<td>36</td>
</tr>
<tr>
<td>REAL MADRID</td>
<td>2.1m</td>
<td>Y</td>
<td>-4</td>
<td>3</td>
<td>12</td>
<td>35</td>
</tr>
<tr>
<td>LIVERPOOL</td>
<td>750k</td>
<td>Y</td>
<td>9</td>
<td>4</td>
<td>8</td>
<td>34.5</td>
</tr>
<tr>
<td>ARSENAL</td>
<td>1.05m</td>
<td>Y</td>
<td>5</td>
<td>4</td>
<td>8</td>
<td>30.5</td>
</tr>
<tr>
<td>INTER MILAN</td>
<td>200k</td>
<td>Y</td>
<td>13</td>
<td>3</td>
<td>9</td>
<td>30</td>
</tr>
<tr>
<td>CHELSEA</td>
<td>2.1m</td>
<td>Y</td>
<td>-12.5</td>
<td>4</td>
<td>7</td>
<td>25.5</td>
</tr>
<tr>
<td>AC MILAN</td>
<td>1.1m</td>
<td>Y</td>
<td>-3</td>
<td>4</td>
<td>9</td>
<td>25</td>
</tr>
<tr>
<td>JUVENTUS</td>
<td>700k</td>
<td>Y</td>
<td>2</td>
<td>4</td>
<td>7</td>
<td>23</td>
</tr>
<tr>
<td>MAN CITY</td>
<td>4.35m</td>
<td>Y</td>
<td>-34</td>
<td>3</td>
<td>3</td>
<td>21.5</td>
</tr>
<tr>
<td>TOTTENHAM</td>
<td>150k</td>
<td>Y</td>
<td>2.5</td>
<td>4</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td>MALAGA</td>
<td>50k</td>
<td>Y</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>12.5</td>
</tr>
<tr>
<td>VALENCIA</td>
<td>30k</td>
<td>Y</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>9</td>
</tr>
</tbody>
</table>

*Data presented here is a close approximation up to 15th January, 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 outside of the chart. The lowest scores were achieved by Spanish teams Malaga and Valencia, which still have low brand awareness on the Chinese market.
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.
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.

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.
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.
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.
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.

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.

<table>
<thead>
<tr>
<th>2012 SPORTS WEIBO HIGHLIGHTS</th>
<th>Forwarded 14,711 times</th>
<th>Forwarded 7,673 times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain wins the Euros 2012</td>
<td></td>
<td>Chelsea wins the Champions League</td>
</tr>
<tr>
<td>Chelsea wins the Champions League</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Image 1: Arsenal Chinese instrument Video

Image 2: Tottenham Hotspur Welcome Video

Image 3: Man City holiday greetings Video

**SOME OF THE HIGHLIGHTS OF THIS RESEARCH:**

#COYS#
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 an 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.

KEY FINDINGS: The Risks of Low Engagement
ENGAGEMENT: SINA VS TENCENT

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

KEY FINDINGS: Engagement - Sina vs Tencent

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.
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.
KEY FINDINGS: Unexpected Demographics - Gender

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.

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’.

Figure 10: Gender demographic across the 14 teams analysed.

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.
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.

For speaking engagements, consultations and further analysis please contact:
Andrew Collins  
CEO, Mailman Group  
Andrew@mailmangroup.com

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.
GET IN TOUCH
info@mailmangroup.com

SHANGHAI, CHINA
Suite 210 Building 3 Lane 210 Tai Kang Rd 200025
Tel +86 21 6445 9899

MELBOURNE, AUSTRALIA
Level 19 644 Chapel St. South Yarra 3141
Tel +61 3 8844 5652

LOS ANGELES, UNITED STATES
515 S. Flower St. 36th Floor City National Plaza CA 90071
Tel +1 213 236 3550

JAKARTA, INDONESIA
Jl. Tanah Abang 1 No. 11F Jakarta Pusat 10160
Tel +62 21 3483 4083