



The First Report on the State of European Football in East Asia

The Ganassa Report

The State of European Football In East Asia 2020



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And -yes!- we are also looking for partners and sponsors for 2021.

Index

INTRODUCTION



P4 – Infosummary

P5 – The Ganassa Report

P6 – Foreword to the Vietnam Report

DEMOGRAPHICS



P8 – China at a Glance

P9 – Survey's Respondents

P10 – Age of Respondents



SUPPORTING

P12 – Most Supported European Clubs

P13 – Other Favourite Clubs

P14 – Most Followed Leagues (by Club)

P15 – Reasons for Supporting a Club

P16 – Influence of Parents

P17 – Switching Club

MEDIA



P19 – News Sources

P20 – Watching Favourite Club's Matches

BEHAVIOUR



P22 – Purchasing Favourite Club's Jersey

P23 – Following Local Football

P24 – Data Story

on the Relevance of Digital Platforms in the Chinese Language

APPENDICES



P26 – Local Voices

on how German Football uses Creativity to Build an Audience in China

P27 – Top 10 Comparison Tables

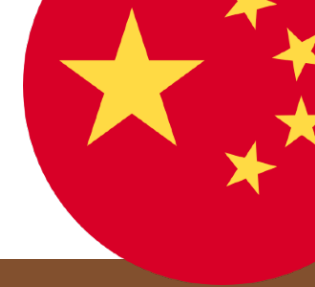
P28 – About Ganassa

P29 – Credits, Specifics, Disclaimer and Copyright



Introduction

Infosummary



The majority of female Chinese fans support a LaLiga club



The three most supported clubs in China play in the English Premier League



Fifteen percent of the Chinese fans who switched club did so to become an Arsenal fan



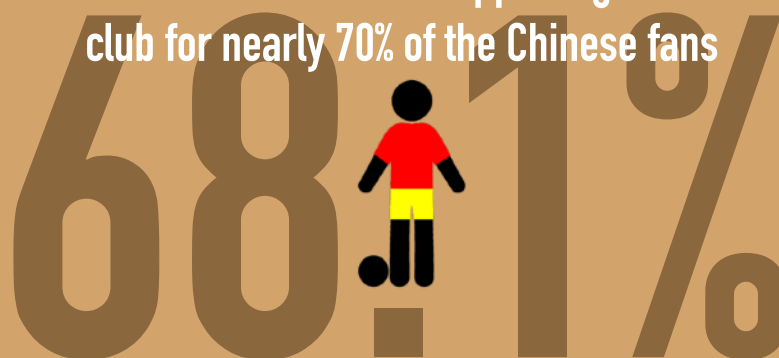
Almost three Chinese fans out of five own an original jersey of their favourite European club



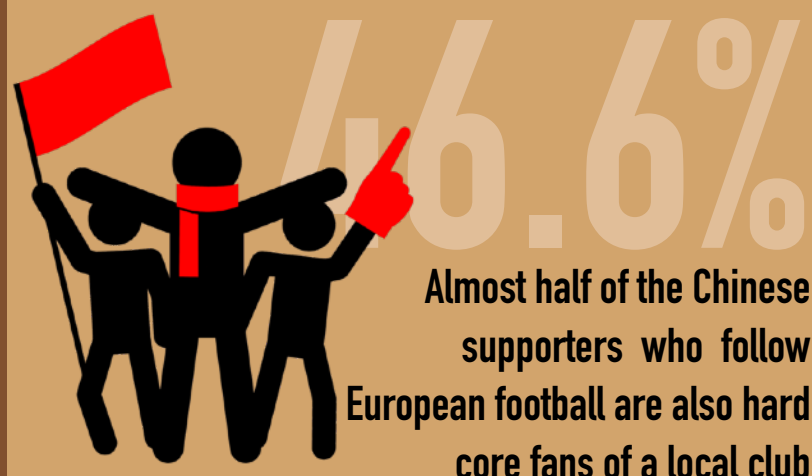
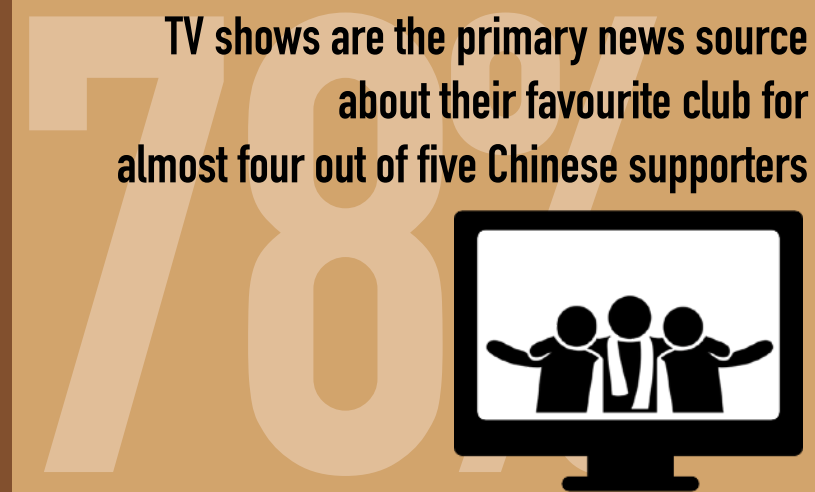
More than half of the Chinese fans sympathize with at least two European clubs



A favourite player or manager is given as the main reason for supporting a club for nearly 70% of the Chinese fans

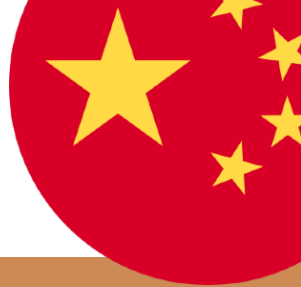


TV shows are the primary news source about their favourite club for almost four out of five Chinese supporters



Almost half of the Chinese supporters who follow European football are also hard core fans of a local club

The Ganassa Report



About a year ago, in the summer of 2019, we were looking for ways to enhance the portfolio of services we offer our clients, and decided to focus upon certain research. Our task was to gain a solid grasp on the behaviour of the fans in the region where we work, East and Southeast Asia.

The first question was: “Which are the most popular clubs in each country?” We also wanted to get more information on the fans, and specifically who they are: how old they are, what jobs do they do – we wanted their full profile! Finally, we hoped to learn about their behaviour vis-a-vis their lives as supporters: how do they get informed about their favourite clubs? Do they watch every match? Have they bought an official jersey this season?

Well, it has been said that nowadays you can find anything on the internet, so we approached our search with great optimism... only to discover that basically none of the data we were looking for existed – or if it did, it was not public.

As some of us have worked for more than ten years as chief or managing editors in Asia, we decided to pull some strings and asked our influential friends in the region – top journalists, TV producers, heads of fan clubs, players etc. with the same result: we got some interesting opinions, but no hard data.



How is this possible, we wondered? We live in an age when football has finally opened its doors to data: Moneyball, Soccernomics, Soccermatics, with plenty of online platforms capable of dissecting every element of a football match... Is it possible that nobody has taken the time to gather data on the most important people in the game – the fans?

Be that as it may, it was clear that there was only one way to get the data that we wanted. So, we rolled up our sleeves and – as we have done several times in the past – brought together a team of football brains from across Asia and started gathering information from six different countries. Beginning with Southeast Asia, our goal was to interview hundreds of people in each country, approximately half of them in the streets and the other half online.

It is not always easy to get the busy and somewhat shy Asian people to open up about their passion for football, but we quickly gained experience and after overcoming a few hiccups we cruised through the first four countries. Alas, as we started with the fifth, early in 2020, COVID-19 swept across the planet and we were forced to complete the surveys in China and Japan mostly online.

By the end of spring 2020, we had gathered over 130,000 pieces of data, provided by almost 5,500 European football clubs’ fans in Vietnam, Indonesia, Singapore, Korea Rep., China and Japan.



We then organised all information into six separate reports plus a regional summary. For the most part, the data confirmed the impression that many of us who had worked in the region for several years had, but, for the first time, it gave us precise numerical details on fans tastes and behaviour. So we now finally know for a fact that Manchester United is the most beloved club in East Asia, that LaLiga’s popularity has surpassed Serie A, that Asian fans love social media (but in their own language!), that many still buy counterfeit jerseys and that in the Orient as well, Borussia Dortmund is every football geek’s “second favourite club”.

Most interestingly perhaps, we have managed to profile reasons why fans choose or change their favourite club, the influence parents have on such

choices, and how support for a European club mixes with that for a local team and national teams. Overall, we believe we have successfully begun to define the “body and soul” of Asian fans. However, this is only the beginning. A lot of lessons were learned in the making of this research, and there are already plenty of ideas to improve it in the years to come.



We offer our work as our contribution to the ongoing discourse on football as a worldwide phenomenon. We hope that the leagues, clubs, media, sponsors, fans and football lovers around the world can make good use of the data we are willing to share with the community; and we are always open to ideas, comments and criticism that will allow us to come back with an even better report. Thanks to all who have worked on this project, and all who will read and utilise this data. But mostly, thanks to the Asian football fans, who found the time and were willing to tell us about themselves: the hope is that thanks to this research many will be able to serve them better – as they deserve.

Cesare Polenghi, CEO

Ganassa LLC
Higashikawa, Japan
June 25, 2020



Cesare Polenghi is a native of Italy and resides in Japan since 1994. His career as journalist, editor and content producer has brought him all around East Asia, where he has opened over 20 football websites in ten different countries for goal.com, football-channel.jp and football-tribe.com. As a TV commentator, Cesare has appeared in over 300 shows, mostly in Japan, before kicking off his own agency, Ganassa, in 2016. He lives between Tokyo and Higashikawa, in Hokkaido, Japan.

Foreword to the China Report



In terms of sheer numbers, China has the most fans in the world and there is an eager passion for football, which remains a favourite sport despite the national teams underperforming in the last two decades. Since 2013, “The Game” has been supported and actively promoted by the Chinese Government through the establishment of youth academies and the purchase of broadcasting rights for European league matches to be shown on national television – all towards preparation for an expected World Cup hosting bid in 2030.

The Chinese Super League has also attracted interest outside the country, and local clubs have a strong following; however, China still lacks the football history and embedded culture of its European counterparts. For all the above reasons, it is no surprise that, as in the rest of Asia, many Chinese have become dedicated supporters of top English, Spanish, Italian and German clubs. Interestingly, fans show variances in preferences with regard to different regions around the vast territory. For example, when gathering the data for this survey we confirmed that, due to the history of TV broadcast choices, Cantonese-speakers in the south are often fans of EPL teams, while Mandarin-speakers are more likely to support Serie A clubs.



Overall, fans in China pursue deep cultural value associations with a club or a specific player, and they will channel their passion towards actively acquiring deeper knowledge – often through digital engagement – in order to feel part of a community. Most supporters are also willing to go the extra mile, watching live

games in the middle of the night, purchasing hefty stadium tickets for Summer Tours, and traveling to European countries in order to live the “local fan” experience: the stadium tour, a visit to the official merchandising store, and so on.



Arsenal is a prime example of a European club that values the Chinese market and which has proactively engaged with it. They set up an office in Shanghai, sell membership cards directly in China, hired a professional reporter working for Titan Sports in London, and have opened up Arsenal-themed entertainment venues. With regard to taking advantage of sponsorship opportunities, Manchester United boasted five Chinese partners this season, with many big-name clubs also backed by Chinese local-market sponsors. Most EPL and several Serie A, Bundesliga and LaLiga clubs signed deals with betting companies from China.

Inter have a local owner, Suning Sports, and the closest commercial relationship with China. They have opened several stores in the biggest cities, selling official Inter merchandise. They are also very active online, having launched a brand new e-commerce website in 2020 to boost goods sales, as well as gaining sponsorship from several high-profile local brands. Wolverhampton Wanderers and Espanyol, also both owned by Chinese businesses, are also investing “at home”.

Top LaLiga clubs have also been involved in big operations in China: for example, in November 2018, Barcelona unveiled its only Experience Center outside of Spain in Hainan province. The complex includes a 4,000m² museum (the largest for any football club outside of its own country), a megastore, an area for restaurants and an academy – the latter operating since the summer of 2017.

Real Madrid have been leading the way in youth development through their academies. Their facility in Guangzhou, in partnership with the top local Chinese club Evergrande, features 50 full-size pitches, 2,500 players and 24 Real Madrid youth coaches who are permanently based in the People’s Republic.



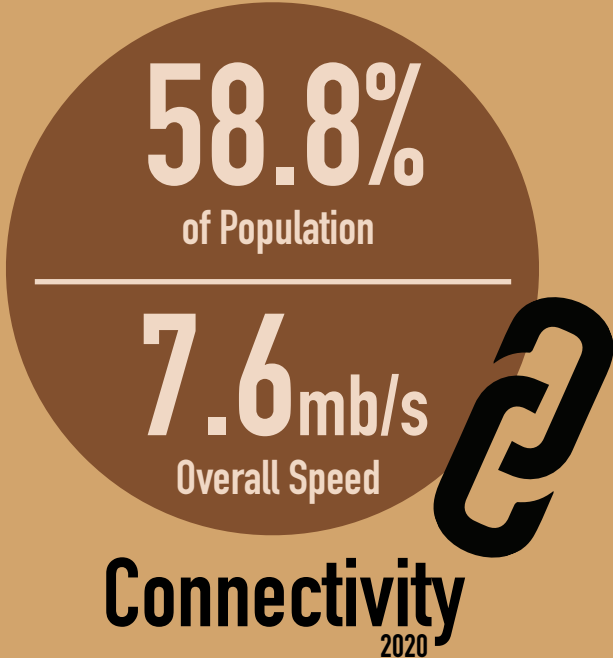
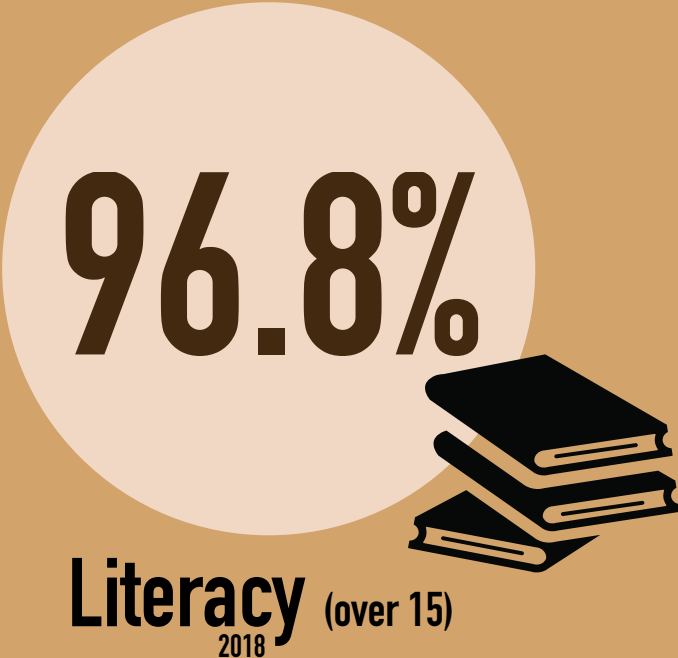
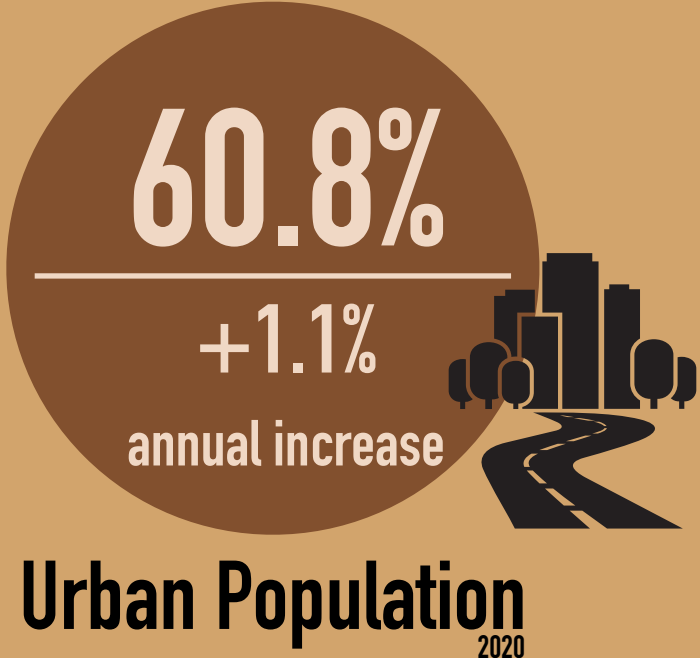
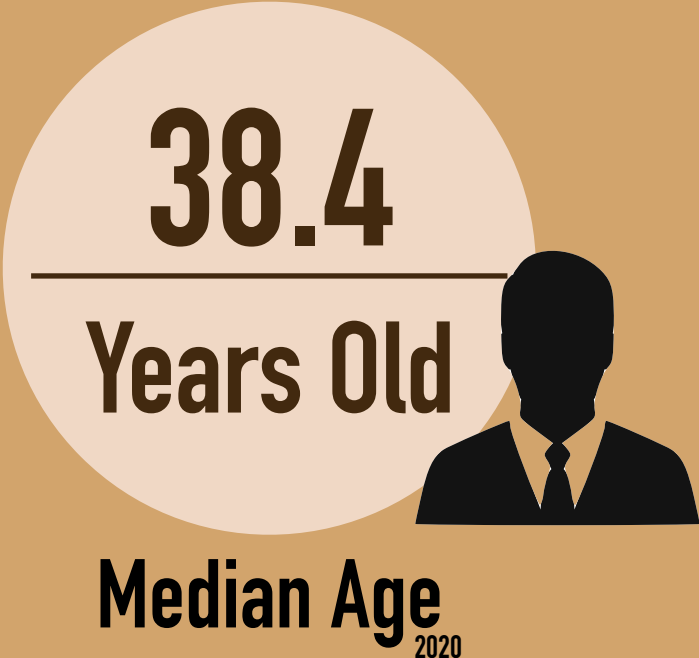
Finally, the Bundesliga is working consistently at promoting its clubs and matches, and has recently consolidated its long-term strategy by partnering up with Douyin and appointing marketing executives at the local Beijing office.

Looking to the future, due to the influence of COVID-19, China, like many other countries around the world, might have to face some tough challenges. However, unless some fundamental political changes take place in the coming years, the Chinese football market is and will remain one of the top destinations in Asia for European clubs.

Demographics



China at a Glance

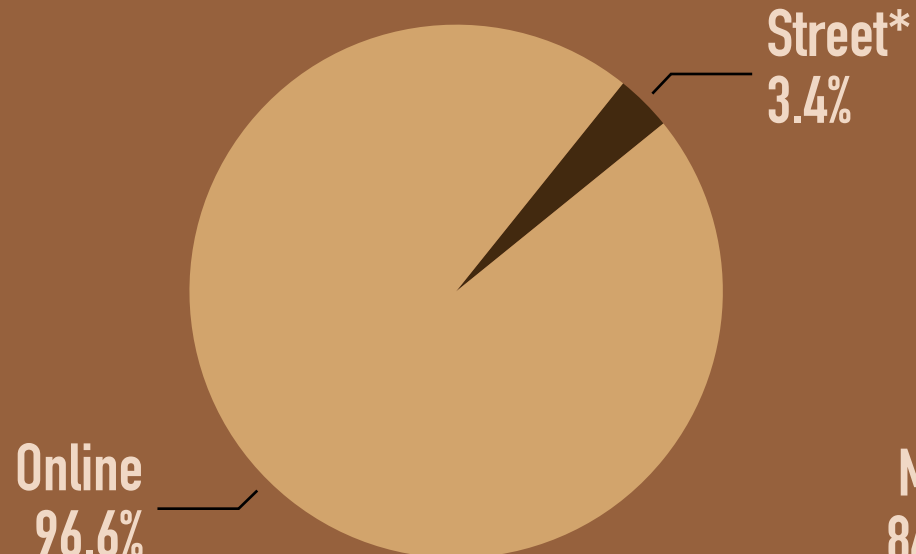


Sources: Worldometers, World Bank, International Telecommunication Union, Akamai Technologies, IMF

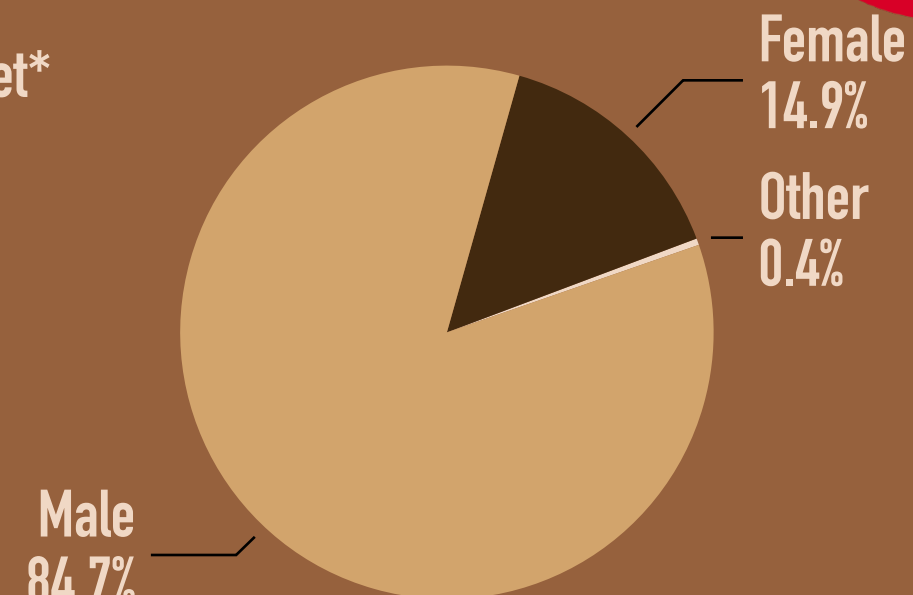
Survey's Respondents



Average Age

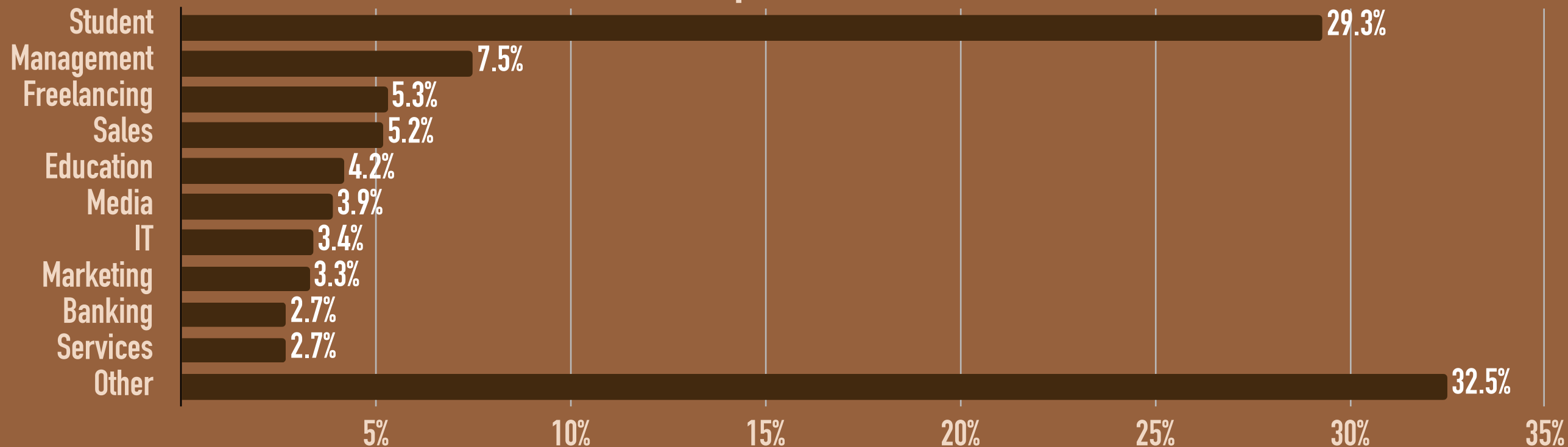


Source



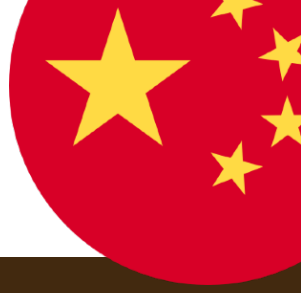
Gender

Occupation



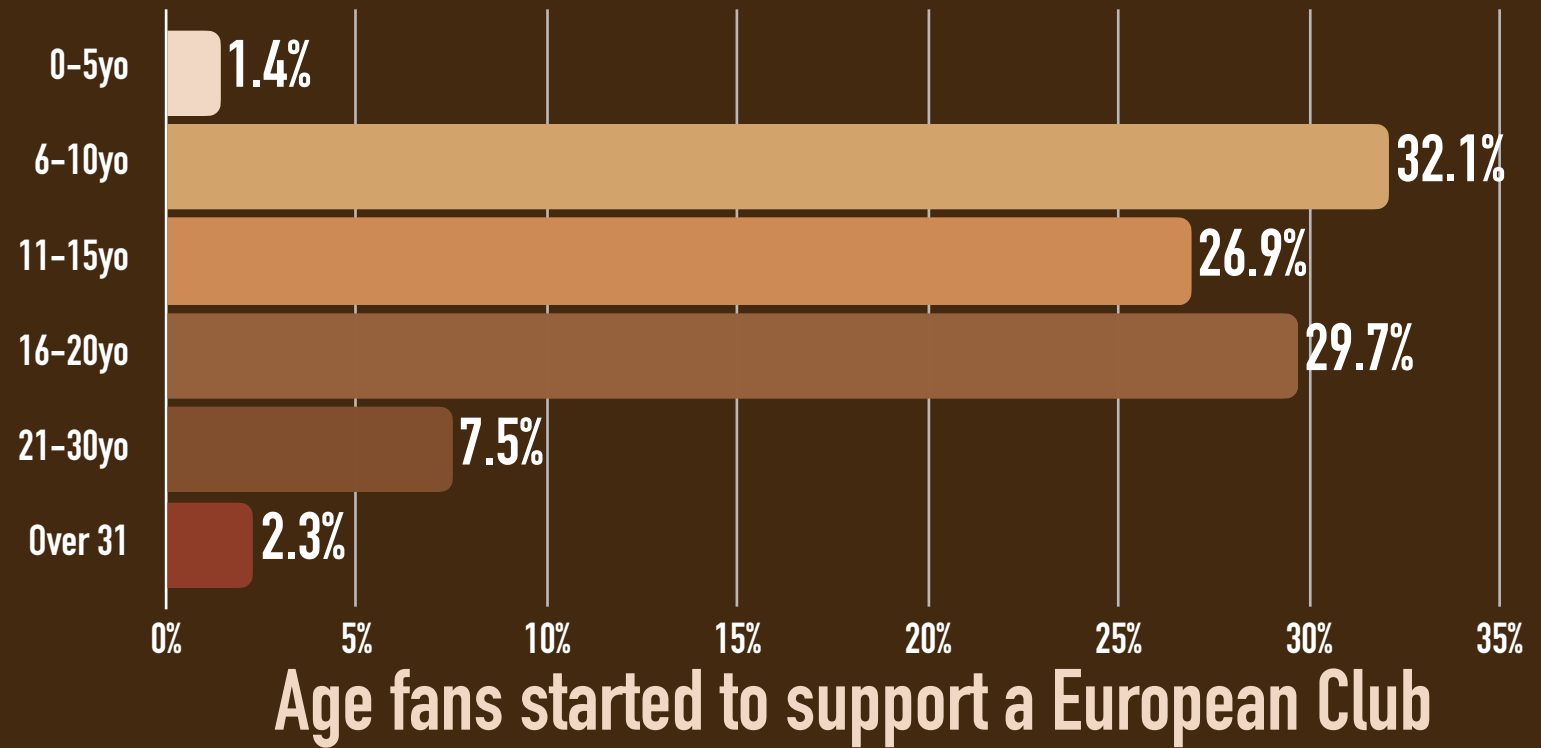
*Street survey had to be discontinued due to COVID-19 outbreak

Age of Respondents



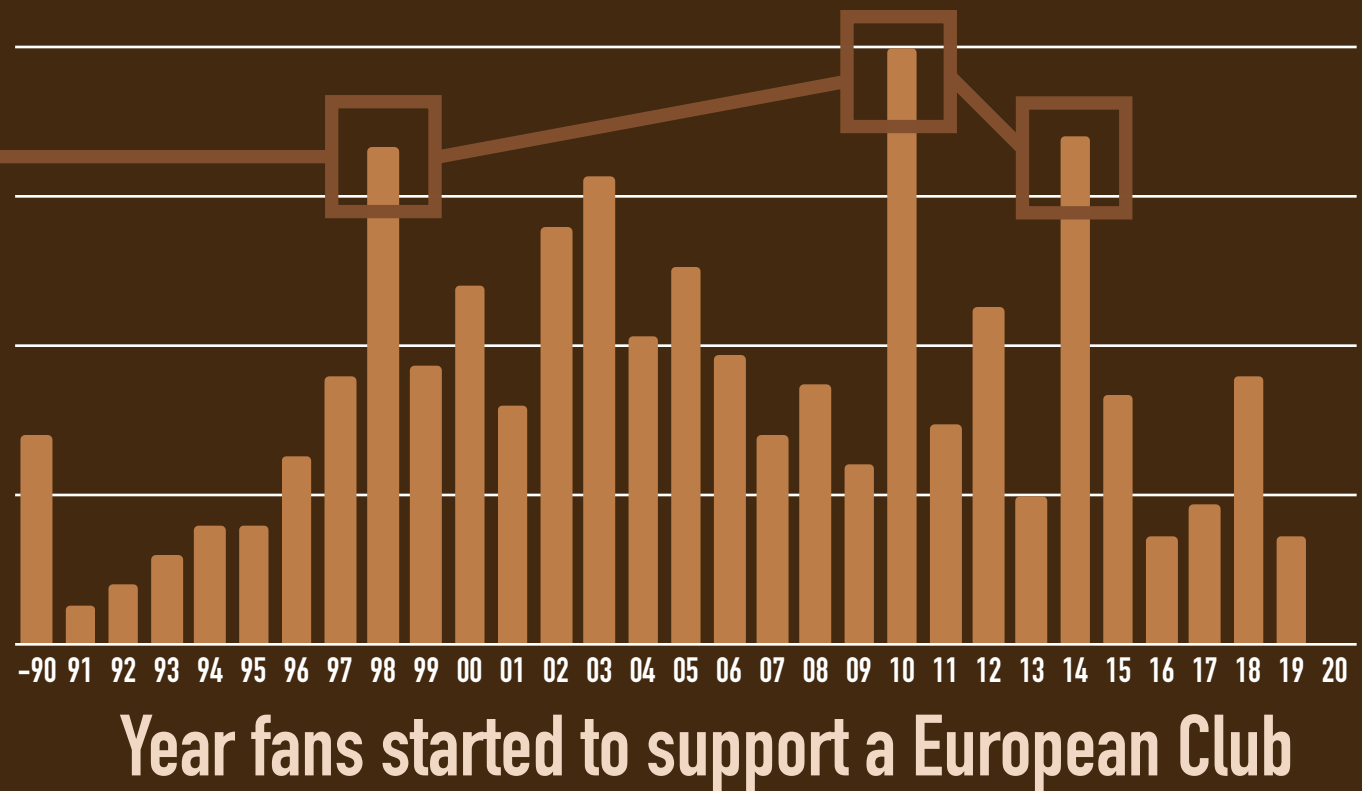
14
Years Old

Average age when became a supporter



1998, 2010 and 2014
Three World Cup Years

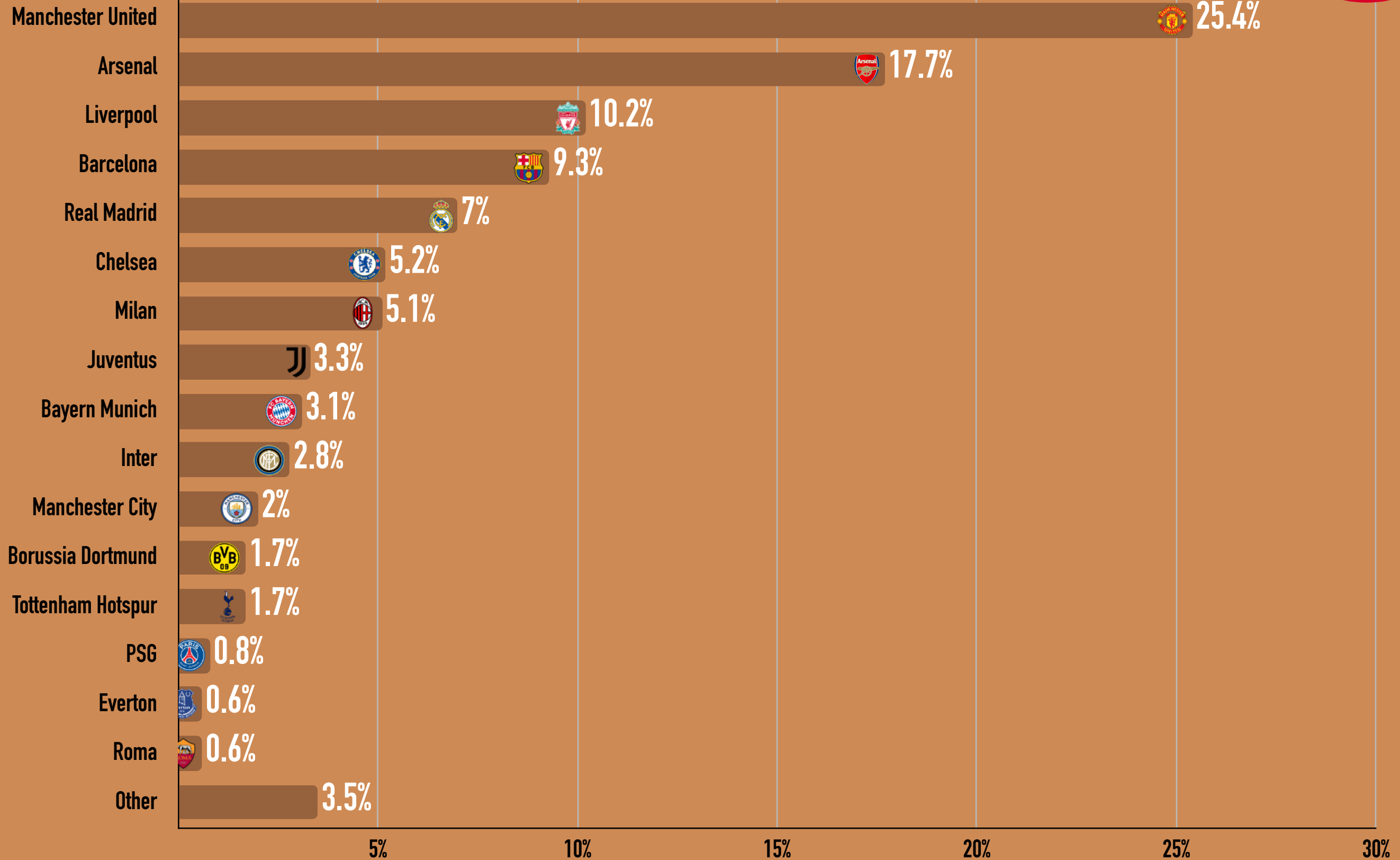
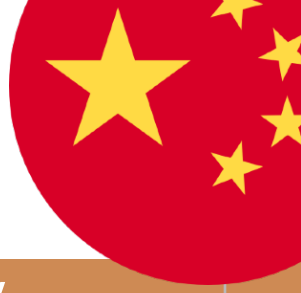
Peak years when most Chinese fans started to follow a European club



Supporting

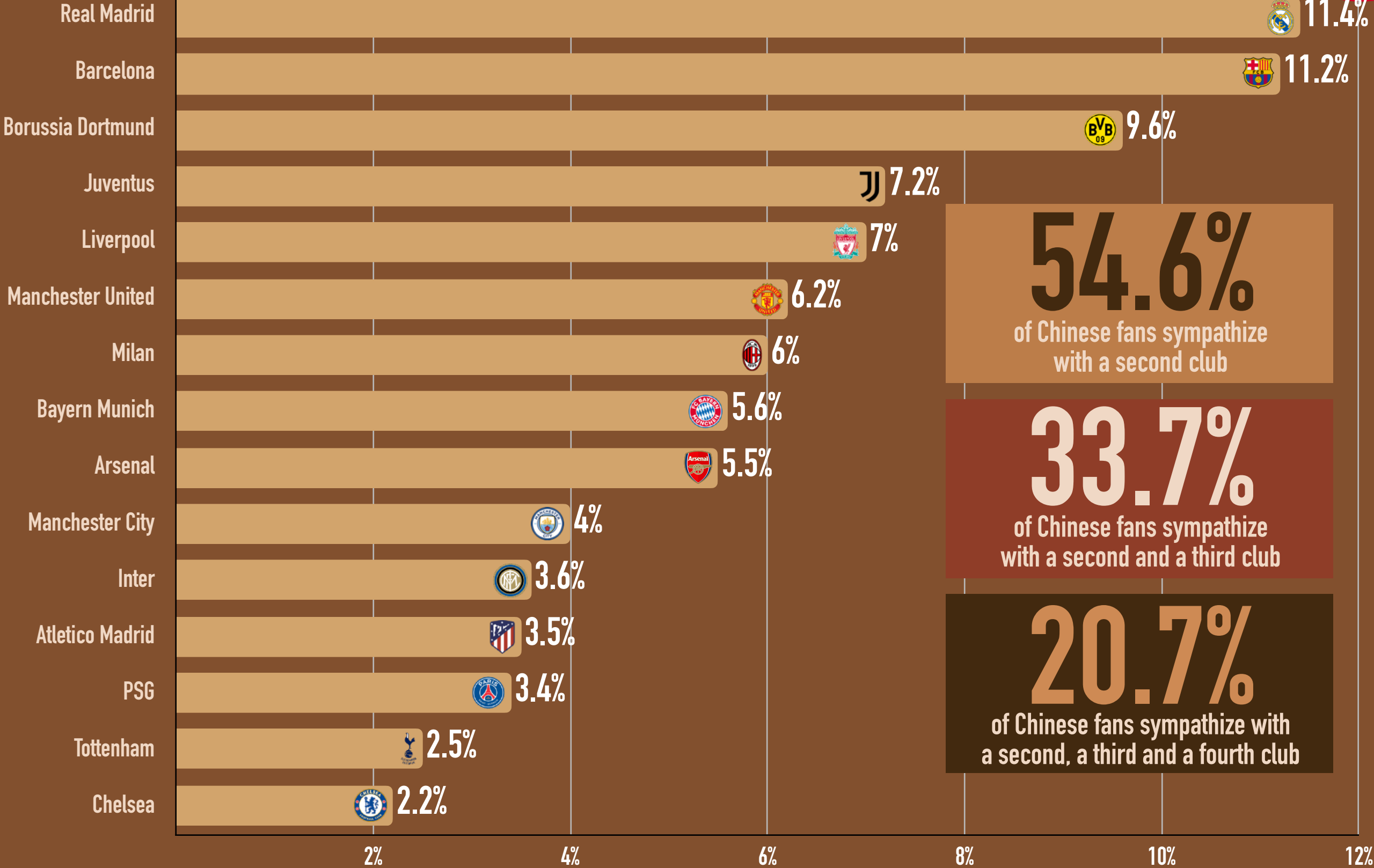


Most Supported European Clubs



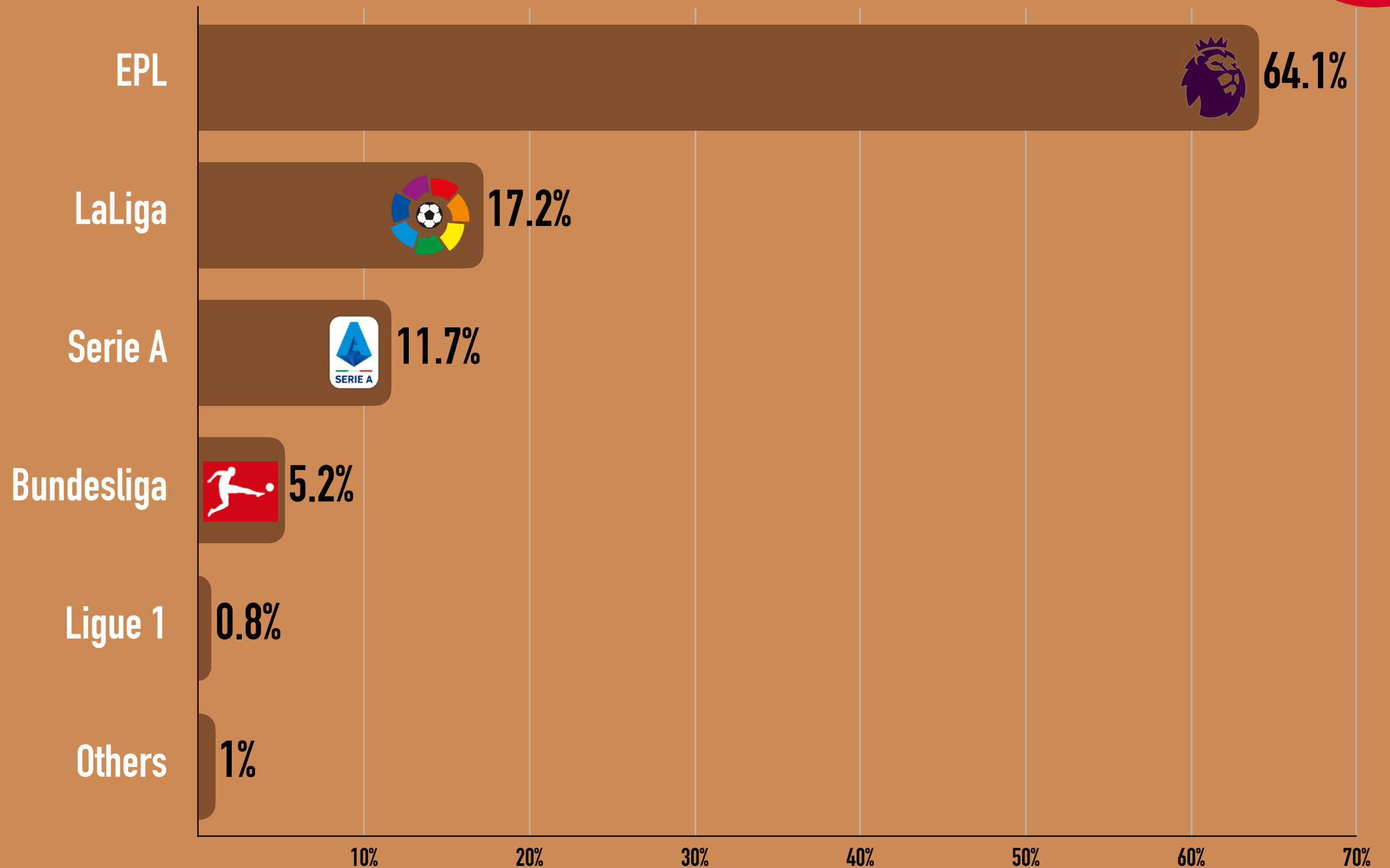
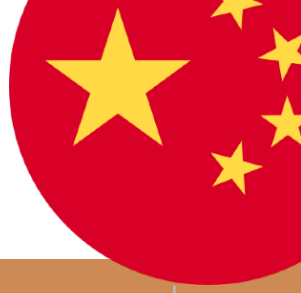
Q: Which is your favourite European Football Club?

Other Favourite Clubs



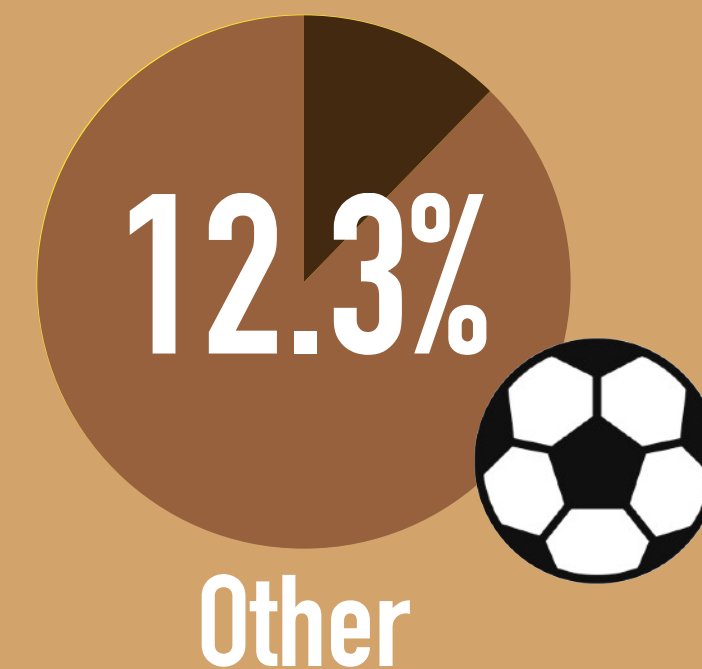
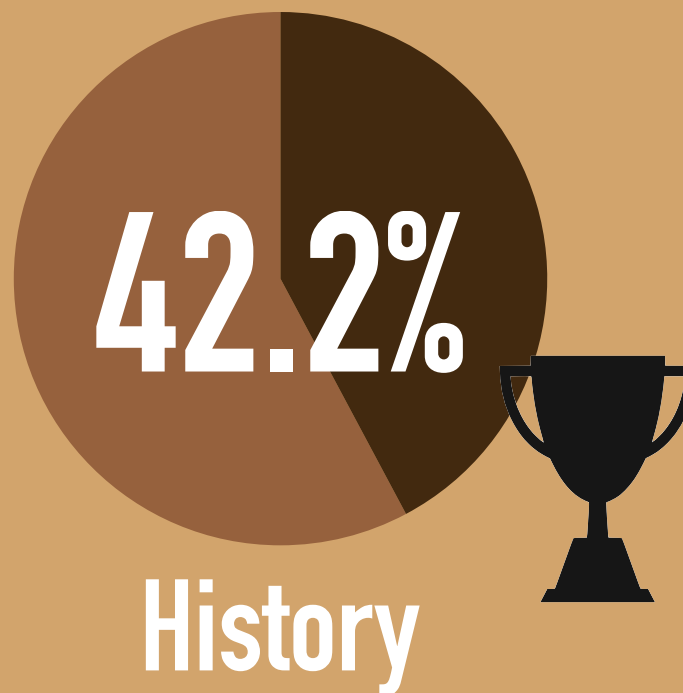
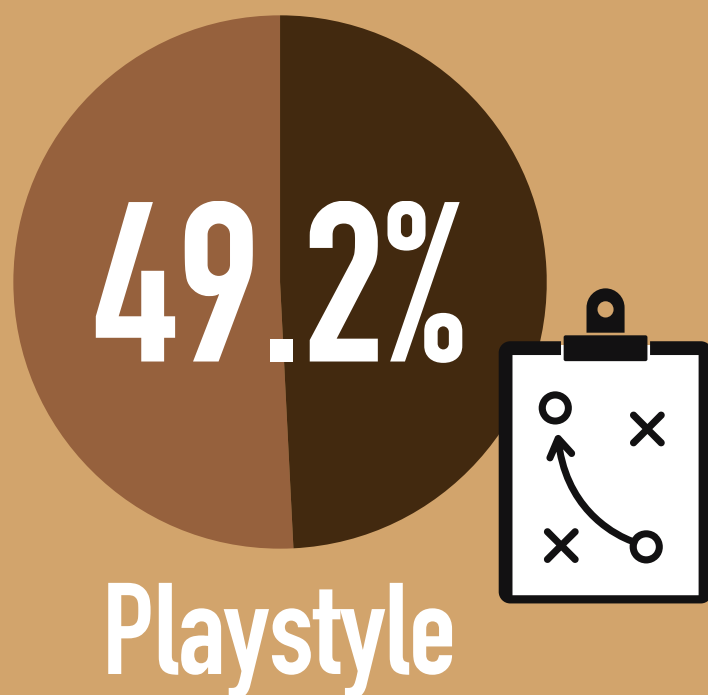
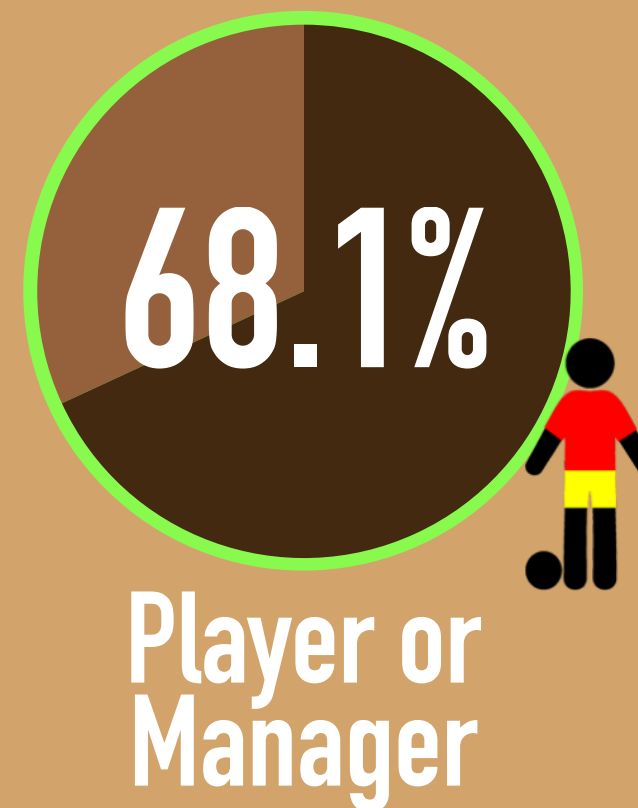
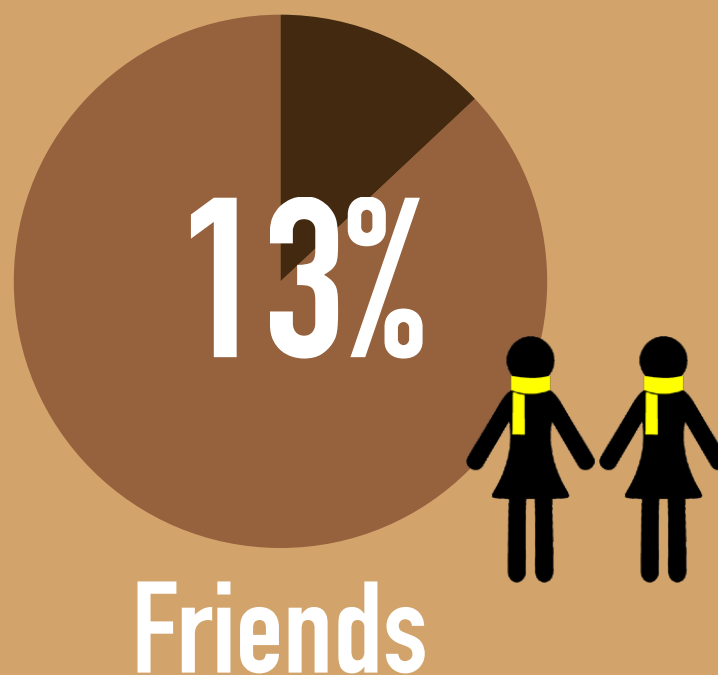
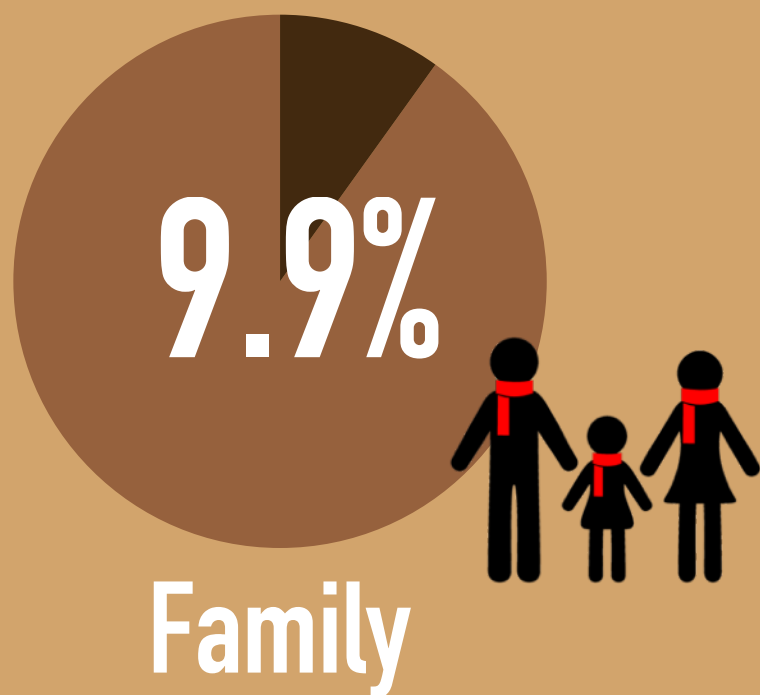
Q: Do you support any other European Football Club in other leagues? Which teams? (up to three)

Most Followed Leagues (by club)



Q: In which league does your favourite European Football Club play?

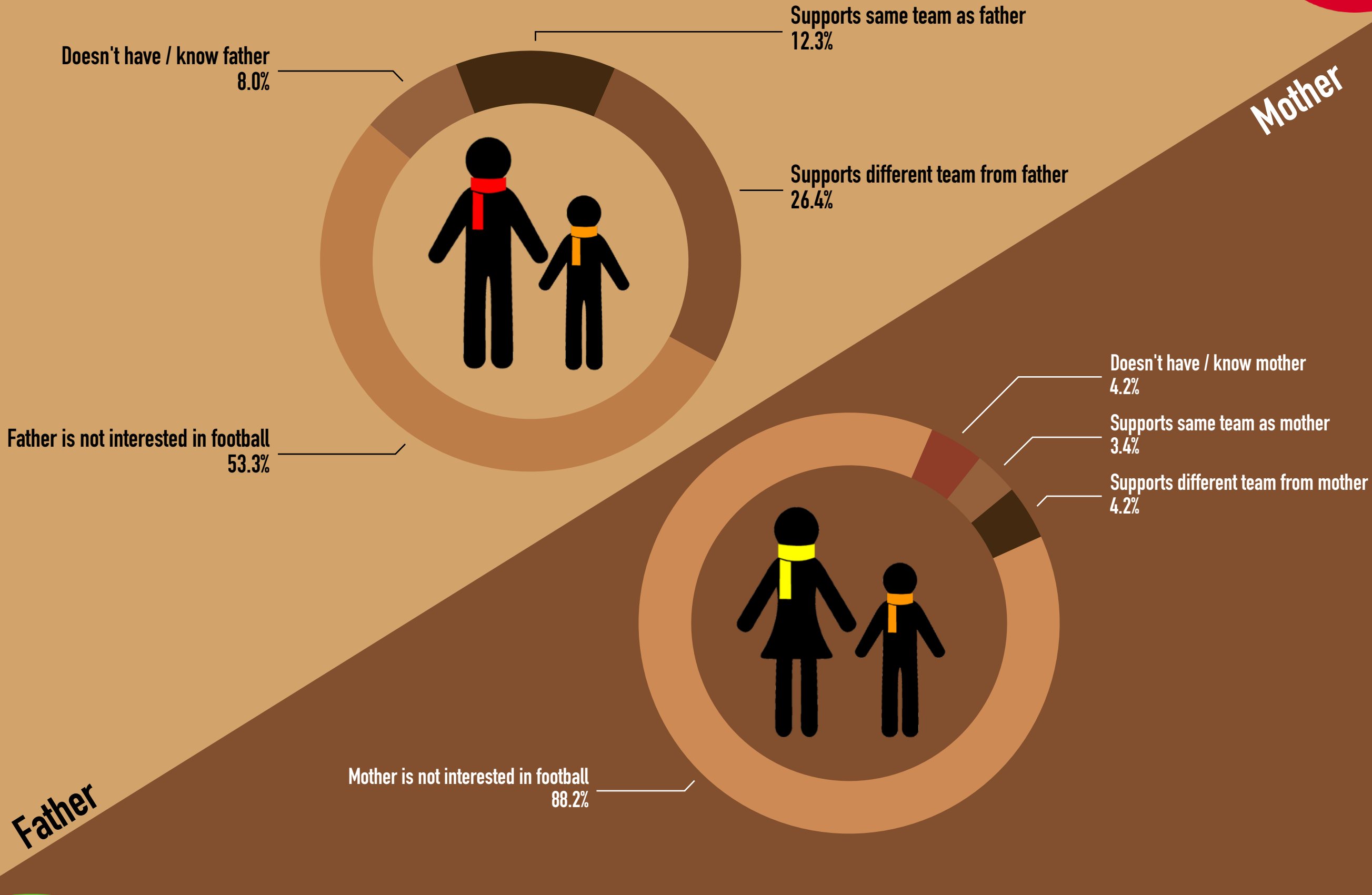
Reasons for Supporting a Club



*Respondents could give multiple answers

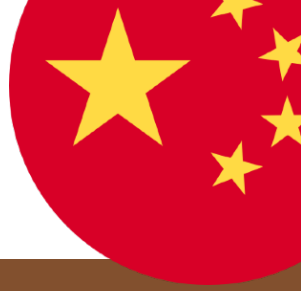
Q: Why did you choose the European Football Club you support?

Influence of Parents



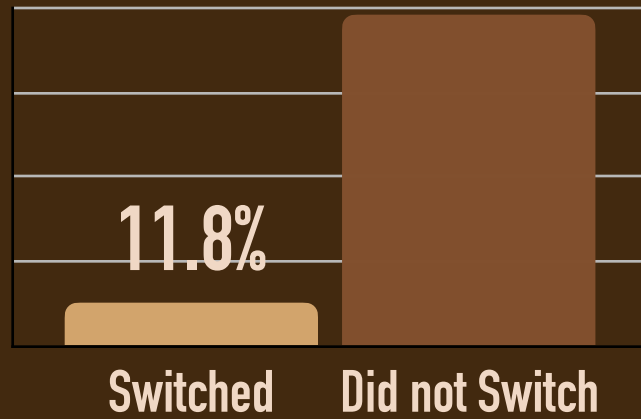
Q: Do you support the same European Football Club as your father/mother?

Switching Club



Supporters who have Switched to another Club

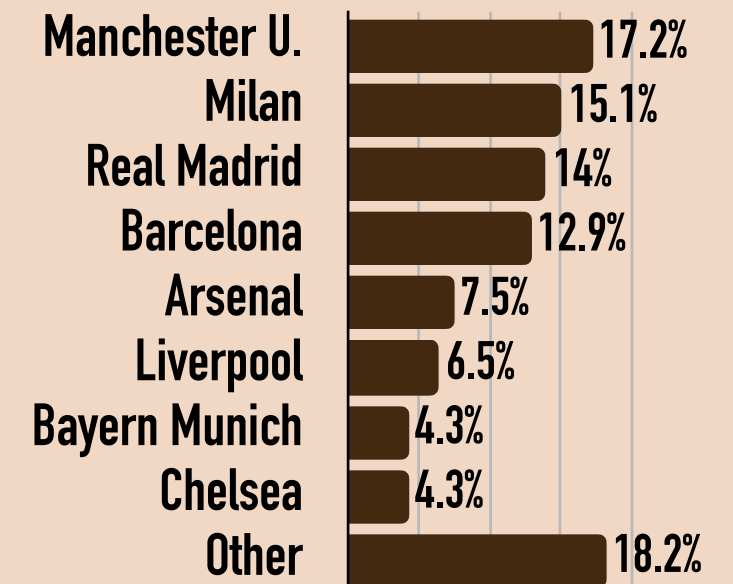
88.2%



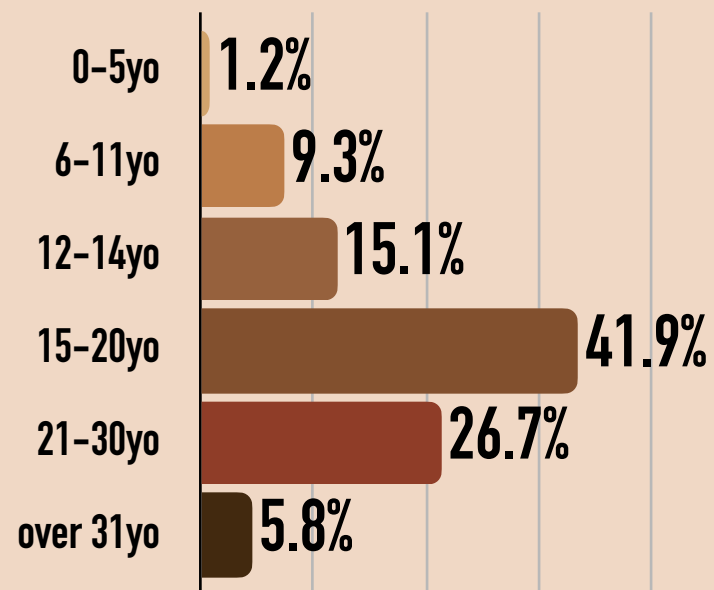
Adopted Club



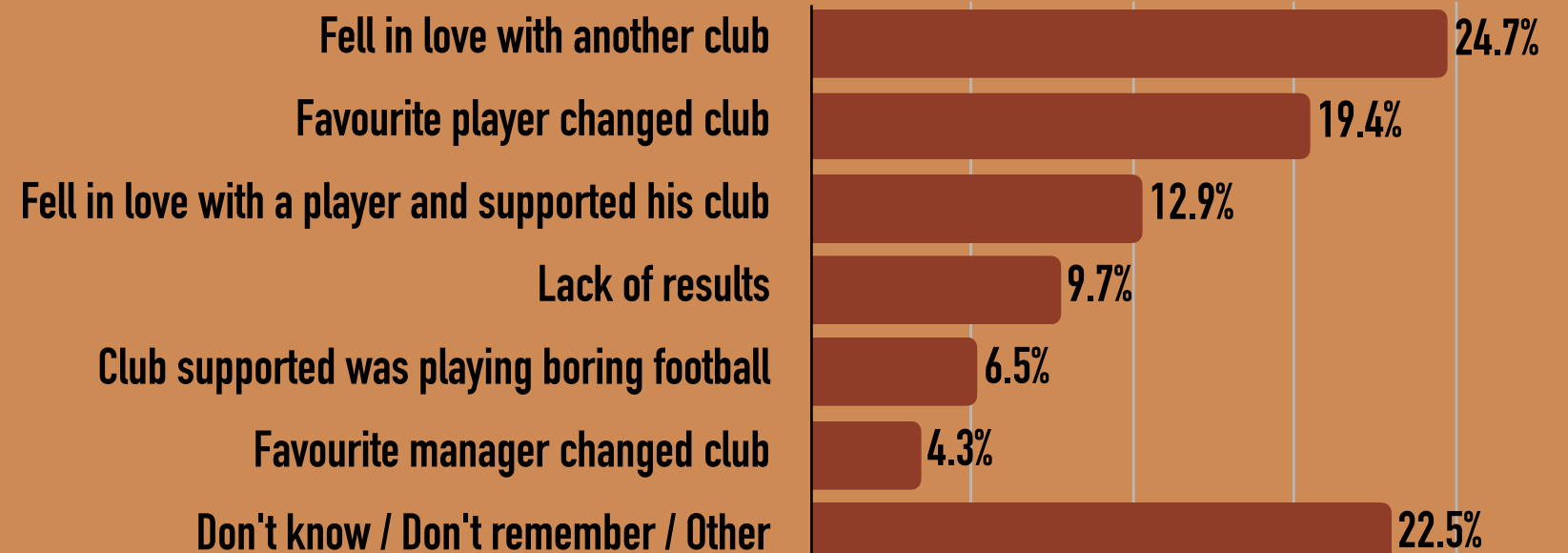
Abandoned Club



Age at which Switch happened



Reason for Switching

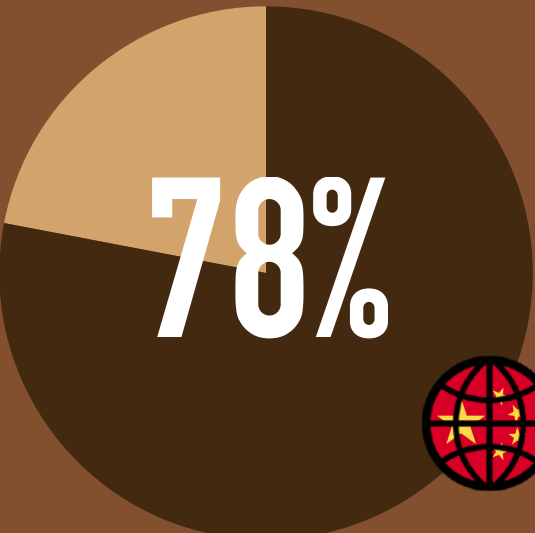
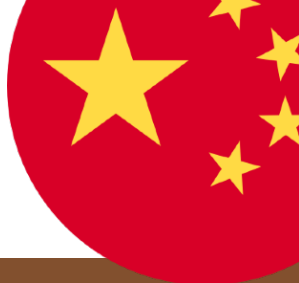


Q: Have you ever changed the European Football Club you support? If yes, why, at what age and which club did you used to support before?

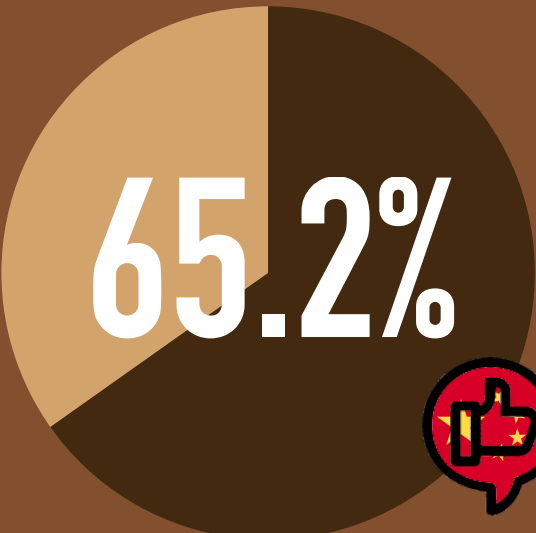
Media



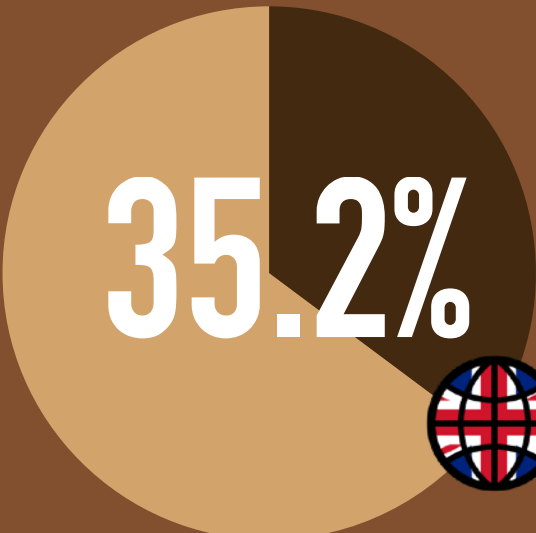
News Sources



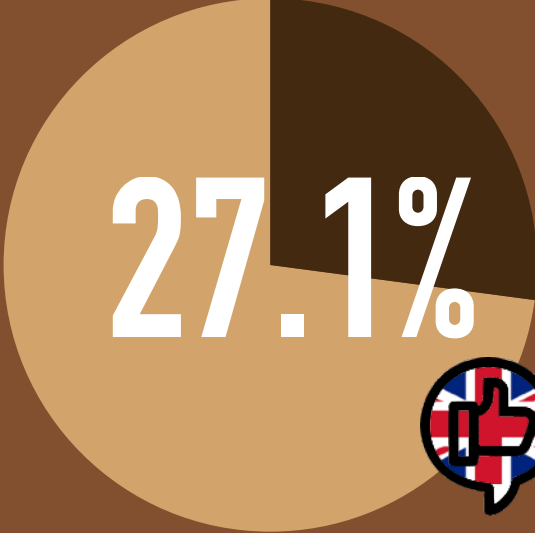
Internet News
(local language)



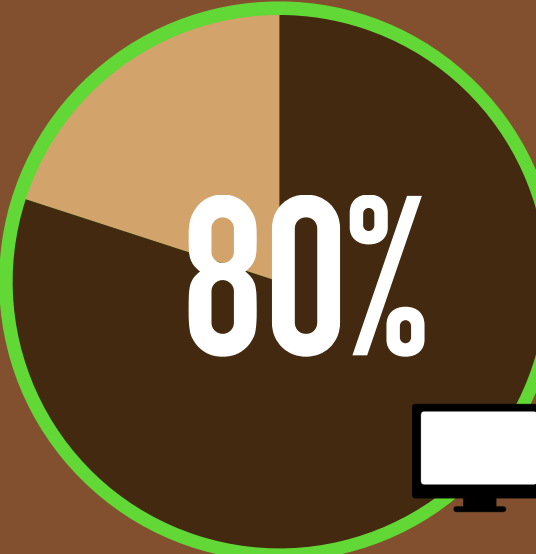
Social Media
(local language)



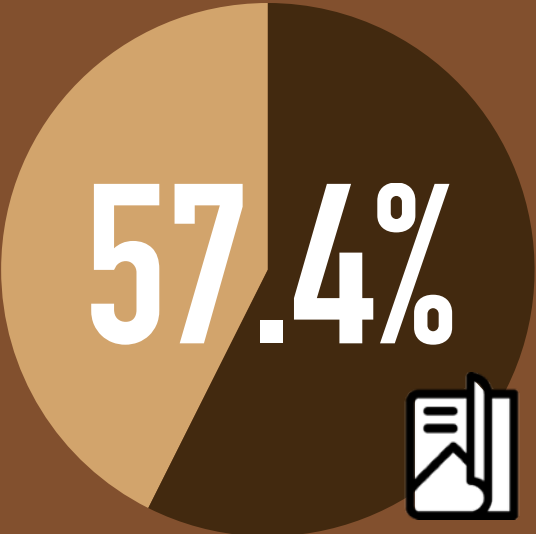
Internet News
(foreign language)



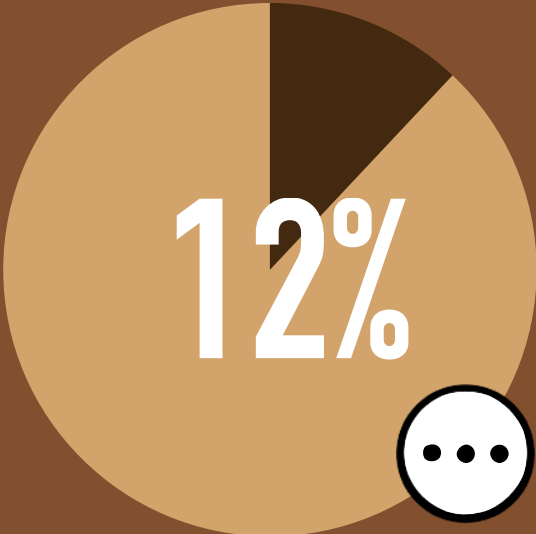
Social Media
(foreign language)



TV



**Newspapers
and Magazines**

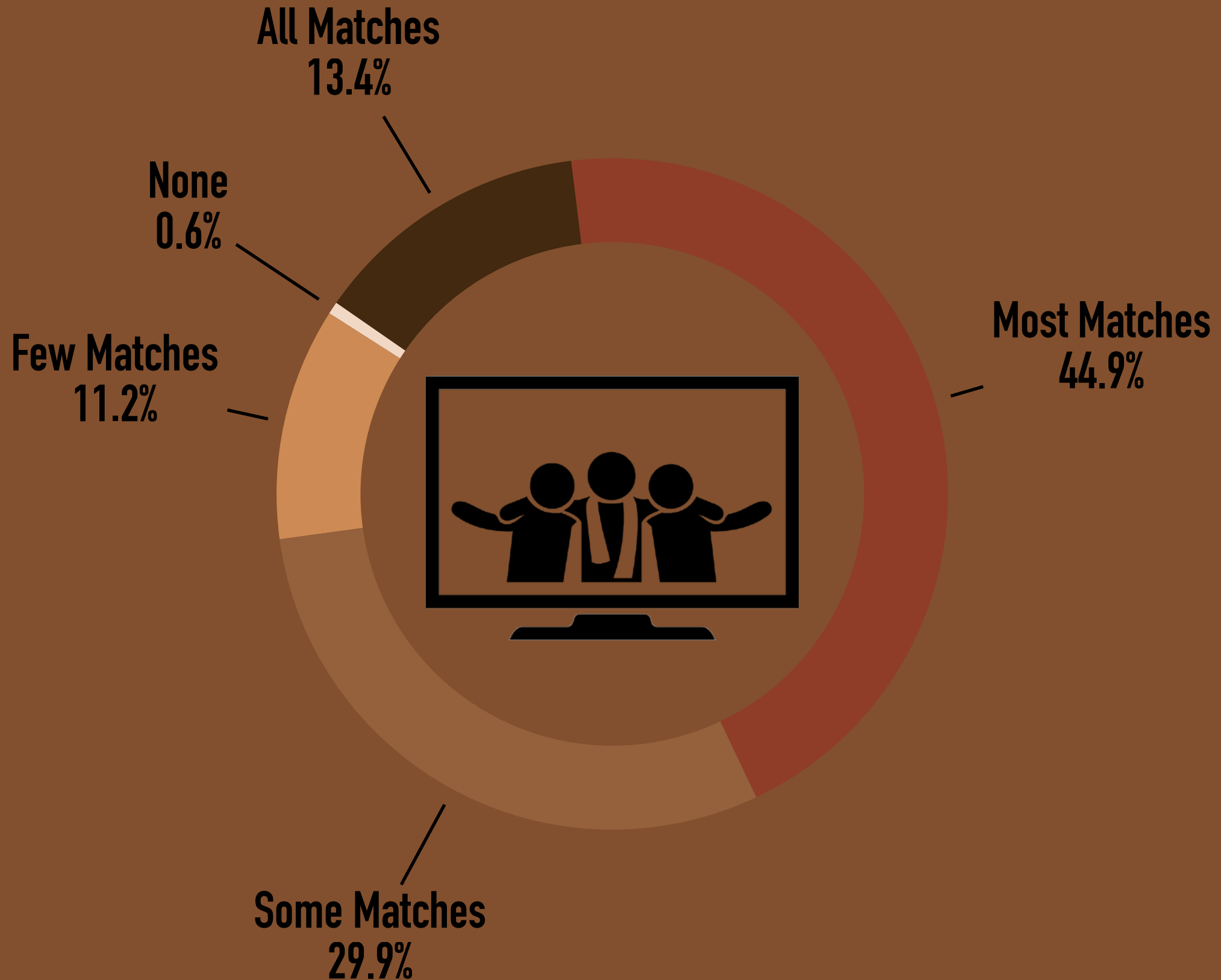
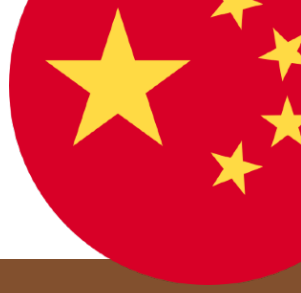


Other

*Respondents could give multiple answers

Q: Where do you get news about your favourite European Football Club?

Watching Favourite Club's Matches

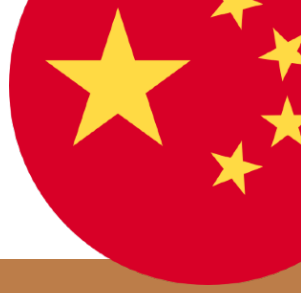


Q: How often do you watch matches of your favourite European Football Club?



Behaviour

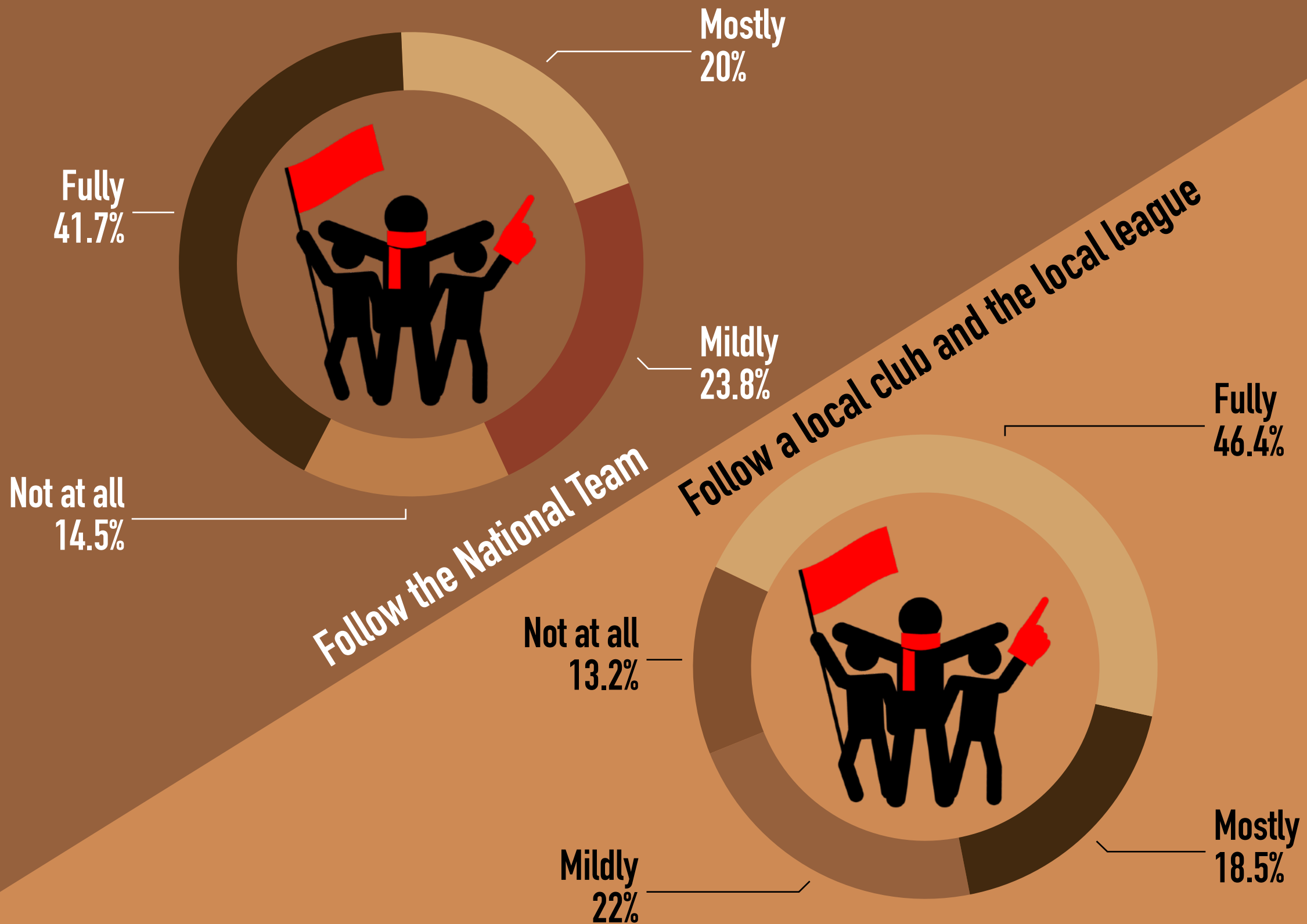
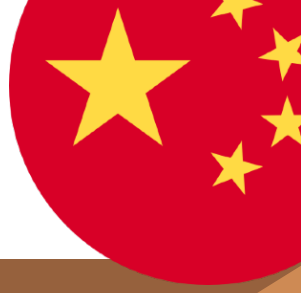
Purchasing Favourite Club's Jersey*



*Does not refer to this season only, but since fan started to follow the favorite club

Q: Do you own your favourite European Football Club's jersey?

Following Chinese Football



Q: Do you support your country's national teams? Do you support a local team and the local league?

Data Story



To break into the Chinese market it is essential to have a strong impact through media in the local language. Our survey is clear: 78% of supporters check websites in the Chinese language, while 65.2% rely on social media.

An interesting case study is Arsenal, which, despite only winning two FA Cups in the last five seasons, are the second most popular club in China (17.7%) and have a low infidelity rate (only 7.5% of those who changed club were Gunners' fans). The North London club's success in China is likely due to them being "first movers" when it came to communicating with fans digitally.

In fact, Arsenal were one of the first European clubs to have both a Chinese-version of their official website (since 2007) as well as an official account on the most popular social network in China, Sina Weibo (2011). This has escalated to a massive communication campaign in the local language in recent years, which helped create a special link with Chinese fans that was then enhanced by participation in the International Champions Cup 2017 in Shanghai.

Moving on to Italy, a similar path has been pursued by the two Milan clubs. Inter has been owned by Suning Group since 2016, but had a Chinese-language website since 2006 and launched its Weibo account in 2010, long before Barcelona and Real Madrid or local rivals

Juventus. AC Milan followed a similar path, with their Weibo account also being unveiled in 2010, and their Chinese website launched back in in 2005.

Opening Digital Media in China

Club	Website	Weibo
	2005	2013
	2007	2011
	2005	2010
	2006	2010
	2011	2013
	2012	2014

This may also help explain why the "Rossoneri" are still the most supported Italian team in China, in spite of

many years without lifting relevant trophies and not playing UEFA Champions League games.

It is also worth underscoring how both Inter and AC Milan regularly play International Champions Cup games in China, including two historic derbies, in 2015 in Shenzhen and two years later in Nanjing. Inter also participated again in 2018. Local events such as these high-profile pre-season matches create the perfect situation to bring the players closer to the local fans in once-in-a-lifetime experiences, and also result in premium content on websites and social media.

The growth of Spanish clubs, especially among younger Chinese, is also noteworthy. Barcelona and Real Madrid have both taken advantage of Messi and Ronaldo's personal activity on Sina Weibo. While CR7's move to Juventus put the brakes on Real Madrid's growth somewhat, the same cannot be said about Barcelona, which is the first team among under-18 users (22.9%) and supporters who started following football after 2015 (16.7%).

Considering the limited access to sources in foreign languages, data points to the importance of creating and managing a digital platform in the Chinese language to guarantee a direct relationship with fans, even when it is not possible for clubs to visit China for events or matches.



Appendices



Local Voices



When it comes to discussing the Football digital-ecosystem in China, both the German clubs and the league stand out for presence, fan engagement activation and the exploration of innovative commercial opportunities.

Talking with representatives of Borussia Dortmund and Bundesliga International in China, we discussed the role of creativity when producing social media content, the relationship between clubs and the league and how that contributes to the success of their brand development strategy. Finally, we profiled local fans and their behaviour.

Considering the fact that BVB only established an office presence in China in 2017, at a time when it had just three active fan clubs in the country, it is impressive to see how there are now eighteen of them, along with four local social media accounts (including one for Borussia Dortmund's beloved team mascot Emma). Moreover, there were four Asian summer tours in the last five years (the latest being entirely virtual), countless kit supplier and offline sponsor activations and a full time dedicated resource in Shanghai in charge of managing the relationship and communication with local fans.



According to **Benjamin Wahl**, BVB head in China, creativity when producing content played a key role in their success so far; the legends tour and matches in Asia, the storyline built around Emma and splitting messages to different audience segments, are some of the keys in driving the hype around the club.

This is also confirmed in the Ganassa report, where we find Borussia Dortmund ranks third as “other most supported club” in China.



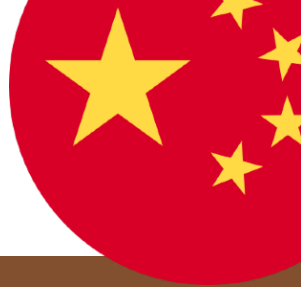
Looking at Bundesliga International, and its opening of a local Beijing branch in March 2019, it is also impressive to see how they achieved both digital and commercial success in such a short time, proving once more that with a solid strategy and implementation plan, China is among the fastest growing and most rewarding football markets in Asia.

As per our discussion with **Patrick Stüber**, Head of China at Bundesliga International GmbH, the German league is unique in its commitment to understanding and growing its fan base in China. On top of their International offices, six clubs also have offices in the country, a number unmatched by any other international football league. This on-the-ground presence allows the league and its clubs opportunities to cooperate when promoting the German top tier competition, whilst also developing effective engagement strategies with local media partners and broadcasters.

Chinese fans of German football are looking for an original and genuine connection with the rights holders, with high focus on transferred values when choosing one club over another, as they look to build their own football identity on the truly localised content and campaigns activated by both clubs and the Bundesliga. The high ratio of female participation in tifo is also a key parameter to consider, especially for the Millennial and Gen Z segments, where the contrast with previous generations is more evident than ever.



Top 10 Comparison Tables



Most Fans in China



1. Manchester U. 
2. Arsenal 
3. Liverpool 
4. Barcelona 
5. Real Madrid 
6. Chelsea 
7. Milan 
8. Juventus 
9. Bayern Munich 
10. Inter 

UEFA Ranking



1. Real Madrid 
2. Atletico Madrid 
3. Barcelona 
4. Bayern Munich 
5. Juventus 
6. Manchester C. 
7. PSG 
8. Liverpool 
9. Manchester U. 
10. Arsenal 

*June 2020

Deloitte Money League



1. Barcelona 
2. Real Madrid 
3. Manchester U. 
4. Bayern Munich 
5. PSG 
6. Manchester C. 
7. Liverpool 
8. Tottenham H. 
9. Chelsea 
10. Juventus 

*2018/19

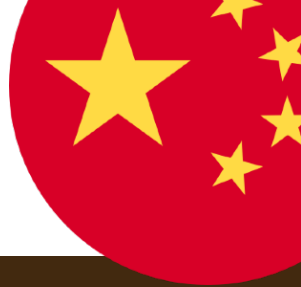
Most Followers Worldwide



1. Real Madrid 
2. Barcelona 
3. Manchester U. 
4. Bayern Munich 
5. Chelsea 
6. Juventus 
7. PSG 
8. Manchester C. 
9. Arsenal 
10. Liverpool 

*June 2020

About Ganassa



Our Editorial Teams



About Us

At Ganassa we are a team of digital football media experts, specialized in the creation, localization, development and maintenance of websites and social media networks.

We work in Japan and across Asia with a crew of local creators and editors, and we have a close relationship with the fans and the football community.

Our mission is to create a bridge between the football cultures in Asia and those across the rest of the world.



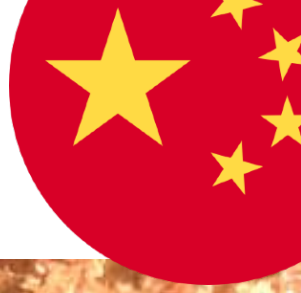
GANASSA | Bridging Asia and the Global Football Community

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Our Clients



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Special Thanks to:

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Street Interviews by:

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Pictures by:

BVB China, Bundesliga International, Milan Circle China, SSC Napoli Fans China, Union of Man Utd Fans China, Roma Fan Club China, Zhijie Shao, Li Hao, MostHandsomePatrickNightStar.

Specifics:

The total number of valid forms used to compile the 2020 Ganassa Report report is 5457. Interviews were conducted in the streets and online in six different countries: Vietnam, Indonesia, Singapore, Korea Rep., Japan and China. Street interviews were conducted mostly at university campuses and during work breaks in areas where office workers have lunch. The utmost effort was put into interviewing people of both genders and of every age. Online data was acquired with the cooperation of reliable regional websites, Facebook groups, Twitter and Weibo accounts and with the help of influencer's accounts. Great care was put into selecting unbiased sources and in checking the reliability of the data. A comparison between street and online data was used to confirm the consistency of the data. Confidence Level (95%) and Margin of Error ($\pm 3\%$) were kept within professional standards. When data had the same values, alphabetical order was used to tiebreak. The terminology in questions about watching matches (All, Most, Some, Few, None) was explained to interviewees by using respectively the following values: 100%, 75%, 50%, 25%, 0%. The terminology in questions about following local football (Fully, Mostly, Mildly, Not at All) was explained to interviewees by using the following values: 100%, 70%, 35% and 0% respectively.

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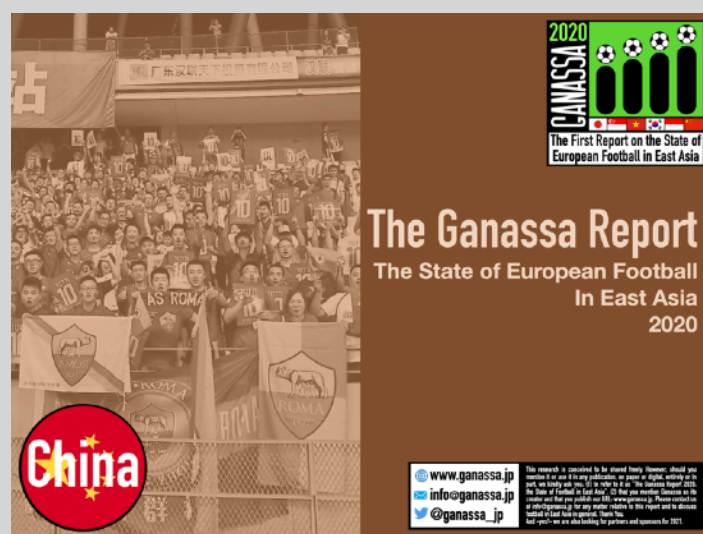
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The Six Countries' 2020 Reports



Japan



China



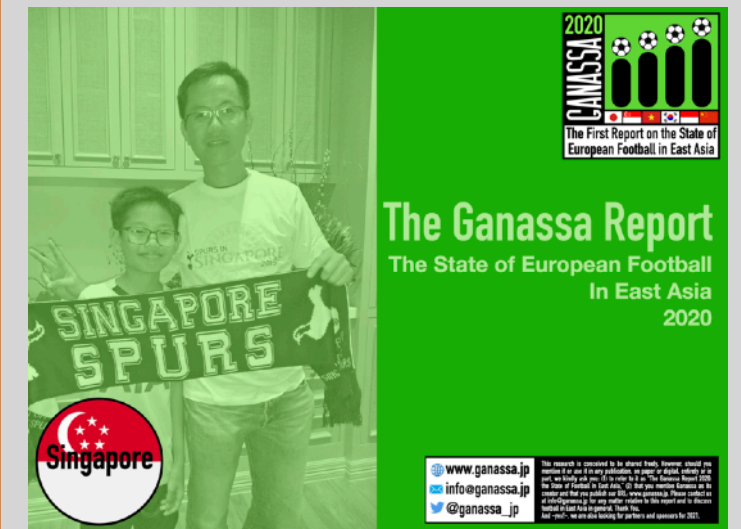
Korea Rep.



Indonesia



Vietnam



Singapore

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The First Report on the State of
European Football in East Asia



Thank You
China