



2020
GANASSA

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.

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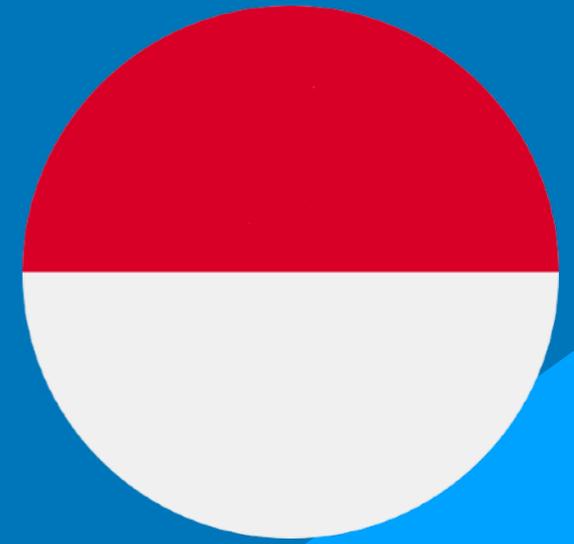
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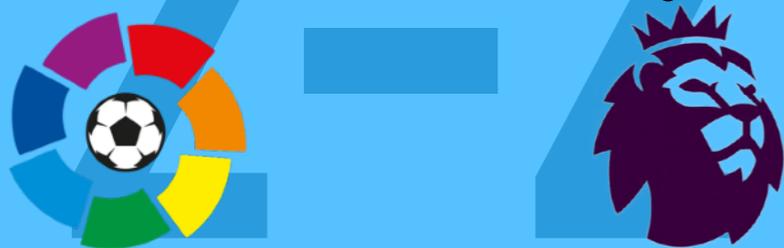
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Introduction

Infosummary

Two of the Top 4 most-followed European clubs are from Spain, while the other two are from England



Two Indonesian fans out of five support a different club from their father



Juventus, Milan and Inter made the Top 10 among the most supported clubs by Indonesian fans



13 female Indonesians supporters out of 20 support one of Manchester United, Chelsea or Liverpool



Indonesia

Social media in local language is the main source of information about their favourite European Club for Indonesian supporters



Indonesia, a former Dutch colony, is the East Asian country where Ajax has the most sympathizers



17 Indonesians out of 20 who support a European club also follow their National Teams



Borussia Dortmund are tied with Real Madrid as Indonesian fans' favourite "second 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, Socceronomics, Soccermetrics, 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 PTE LTD
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 opening his own agency, Ganassa, in 2016. He lives between Tokyo and Higashikawa, in Hokkaido, Japan.

Foreword to the Indonesia Report

Indonesia is the fourth most populous country in the world and ranks third in Asia, representing a huge market for all kinds of opportunities – especially related to football, which has become the number one sport in the nation. Indonesian fans are very active both in and out of the stadium, supporting not only local teams but also European clubs. Their supporters fill terraces, go to pubs and cafes to watch their favourite sport every night they can, buy merchandise and spend their time commenting online and exhibiting affection for their clubs on social media.



Indonesia is a big market for the English Premier League, with the 'Big Four' clubs (Arsenal, Manchester United, Liverpool and Chelsea) dominating the popularity stakes amongst millennials, while some Serie A old school fanatics remain enamoured with Juventus, AC Milan and Inter. There is also a steady following for LaLiga giants Barcelona and Real Madrid.



Indonesian entrepreneurs have not been shy about acquiring European clubs either, with the most well known, Erick Thohir, a majority shareholder of Inter Milan for several years. Thohir is now Minister of State Owned Enterprises and had to reduce his holdings in the Indonesian club Persib Bandung and English club Oxford United in order to avoid conflict of interest issues. Other Indonesian entrepreneurs have tried to follow in his footsteps, including the Winandi brothers, who bought the English club Tranmere Rovers in 2019, the Hartono brothers, who bought the Italian club Como 1907 FC in 2019, and Yusuf Mansyur, who has a minority stake in the Polish club Lechia Gdansk, with his company, PayTren, becoming the secondary sponsor of the club.



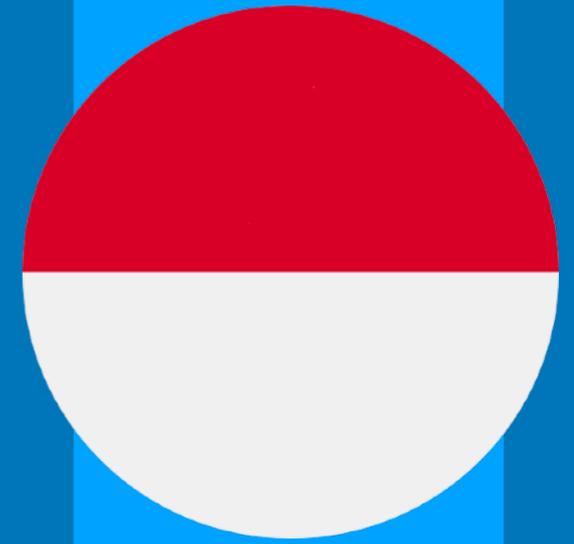
The Indonesian media covers European football enthusiastically, with the likes of GOAL.com Indonesia, 90min.com Indonesia and Football Tribe Indonesia among the most popular sites. Fans have also created their own community media on Twitter, LINE, and Instagram to share the latest news about their clubs.



Legends from the 1990s and recently retired players from all over the world are hugely attractive for Indonesian fans, especially those who played in the EPL, Serie A or LaLiga, and their visits generate enthusiasm among the supporters. Indeed, football may be a relatively new phenomenon in Indonesia, but it has already established deep roots.

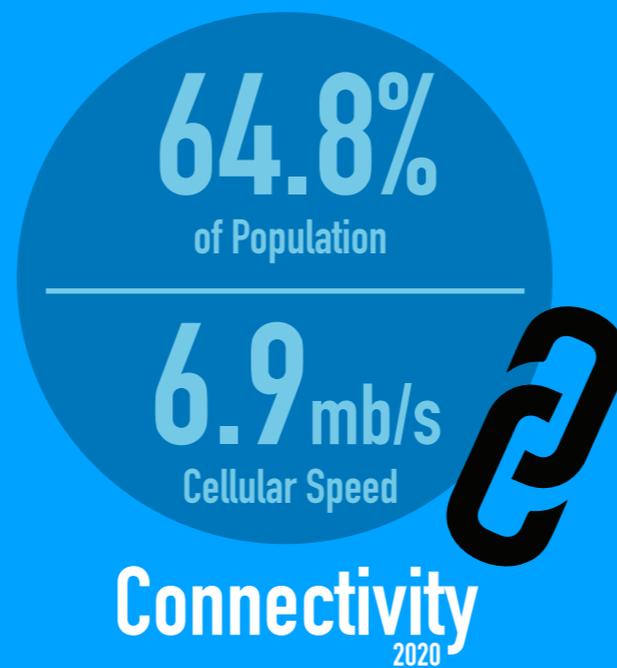
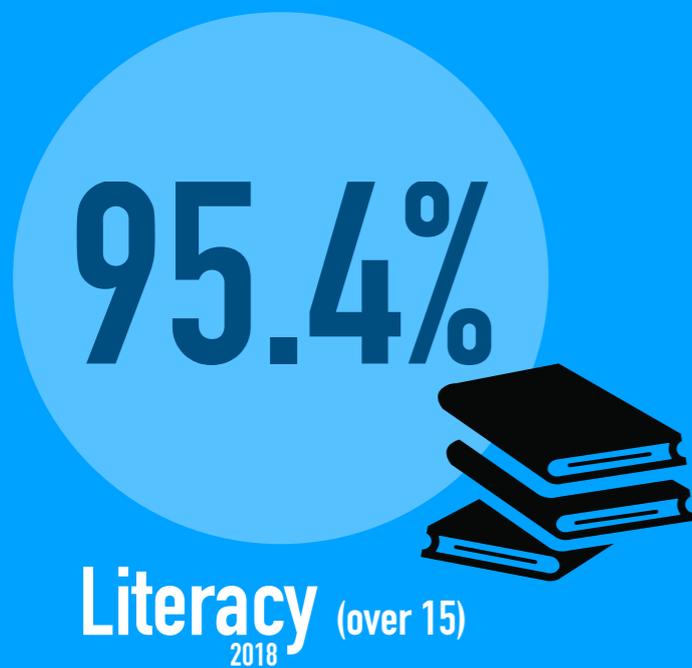
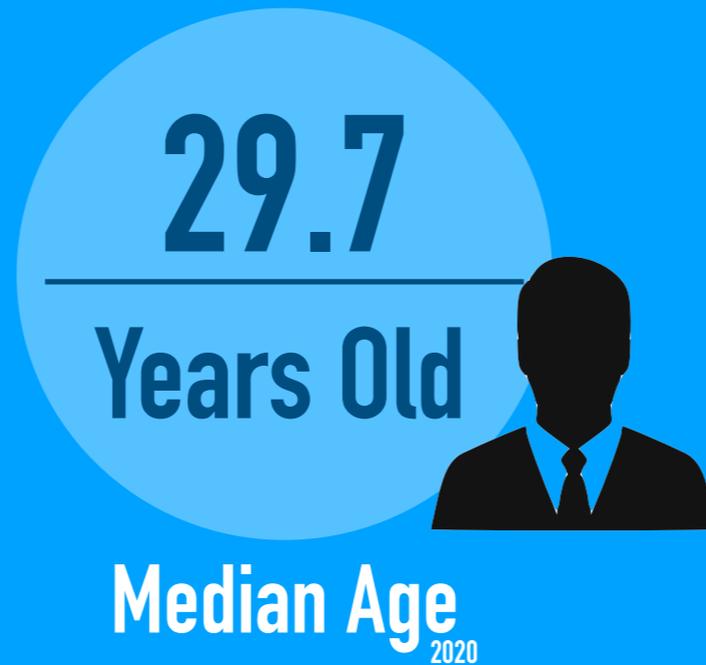
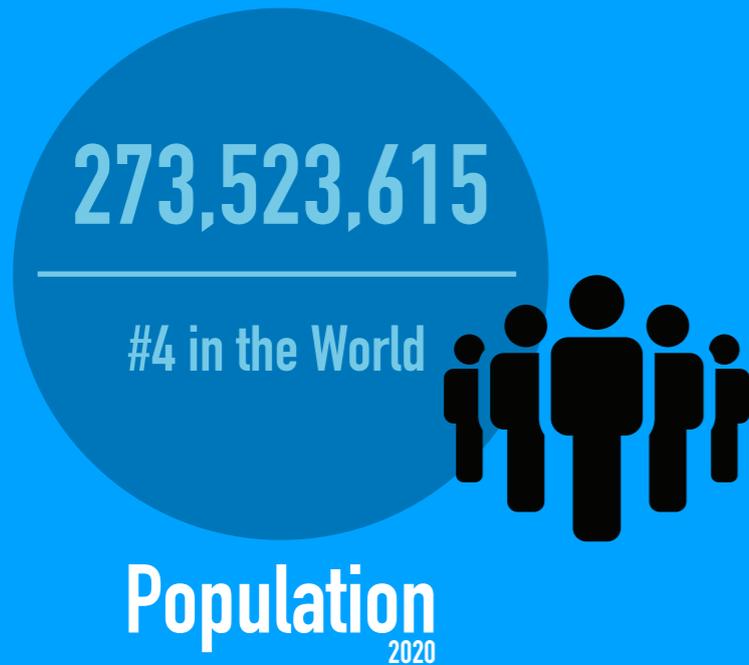


CANASSA



Demographics

Indonesia at a Glance

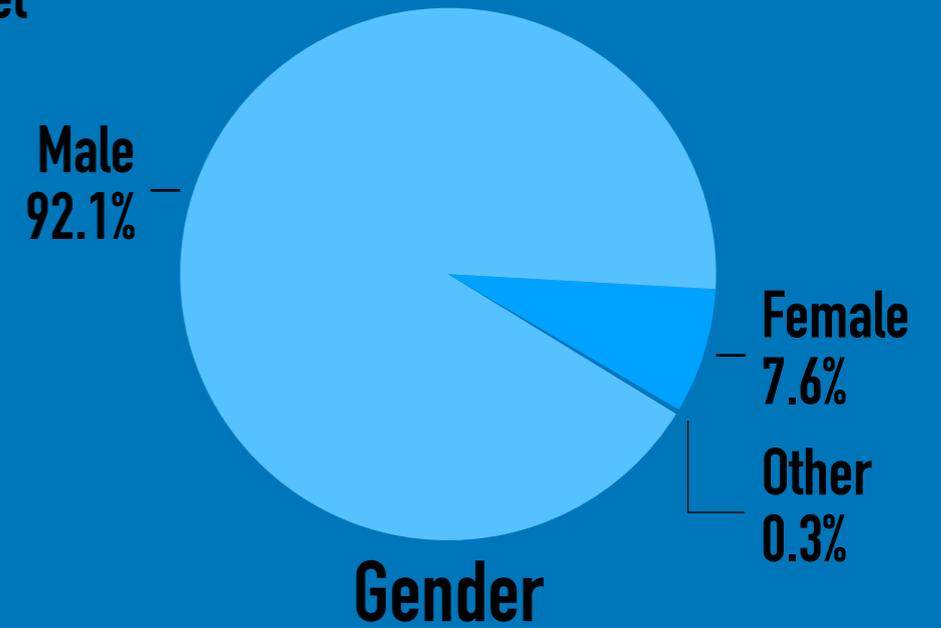
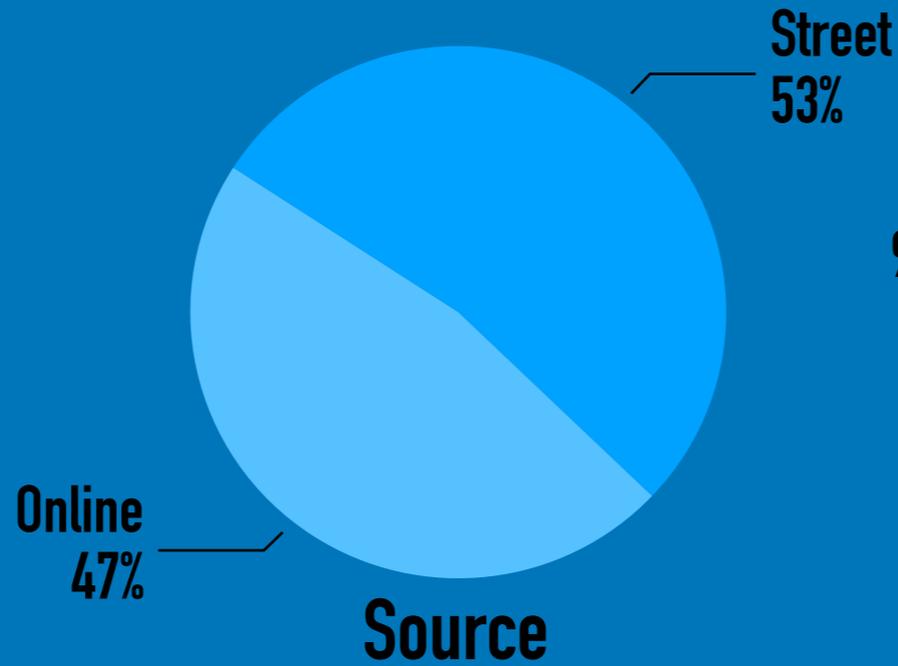


Sources: Worldometers, World Bank, International Telecommunication Union, Opensignal, IMF

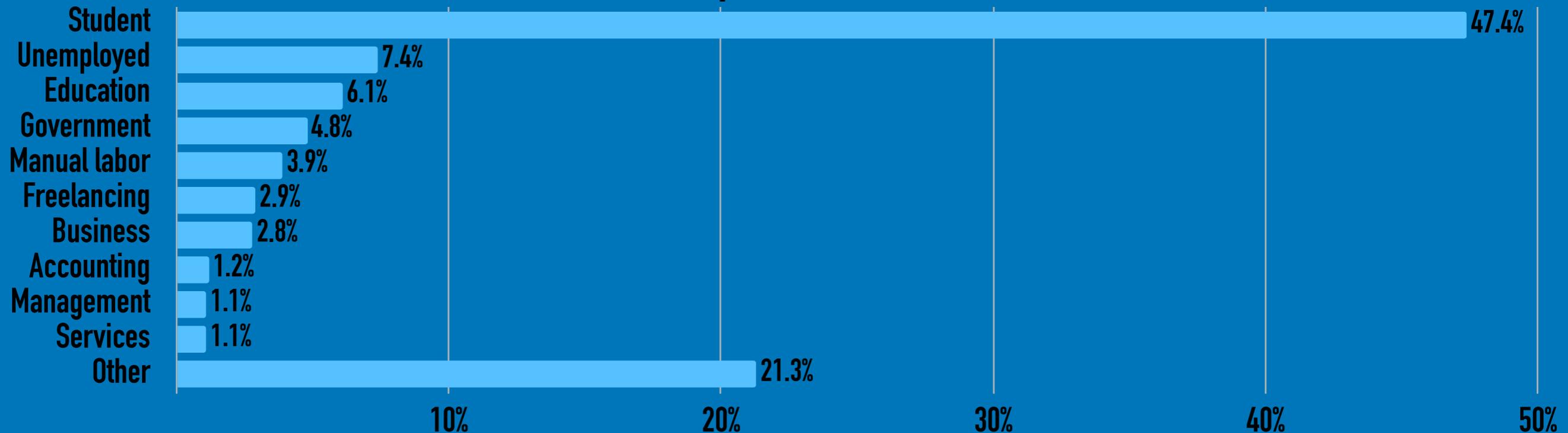
Survey's Respondents



Average Age



Occupation

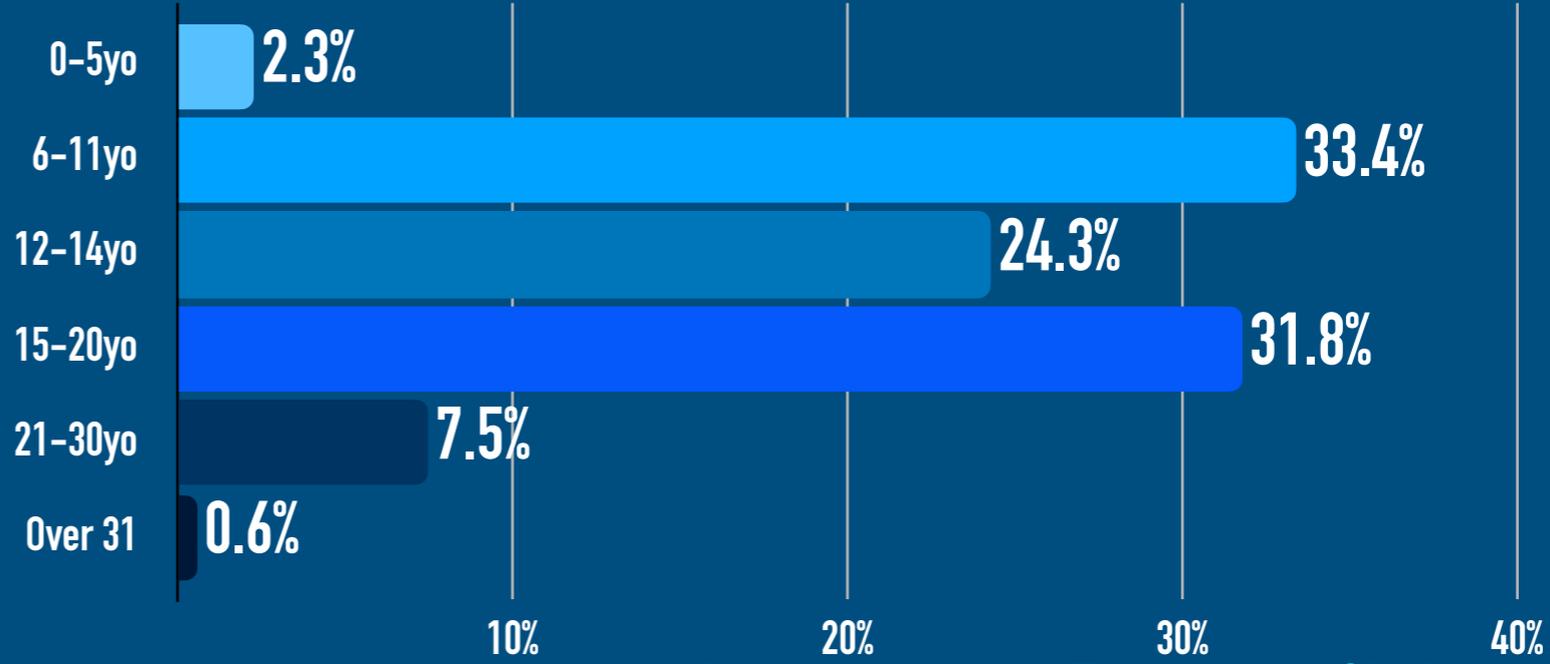


Age of Respondents



13.5
Years Old

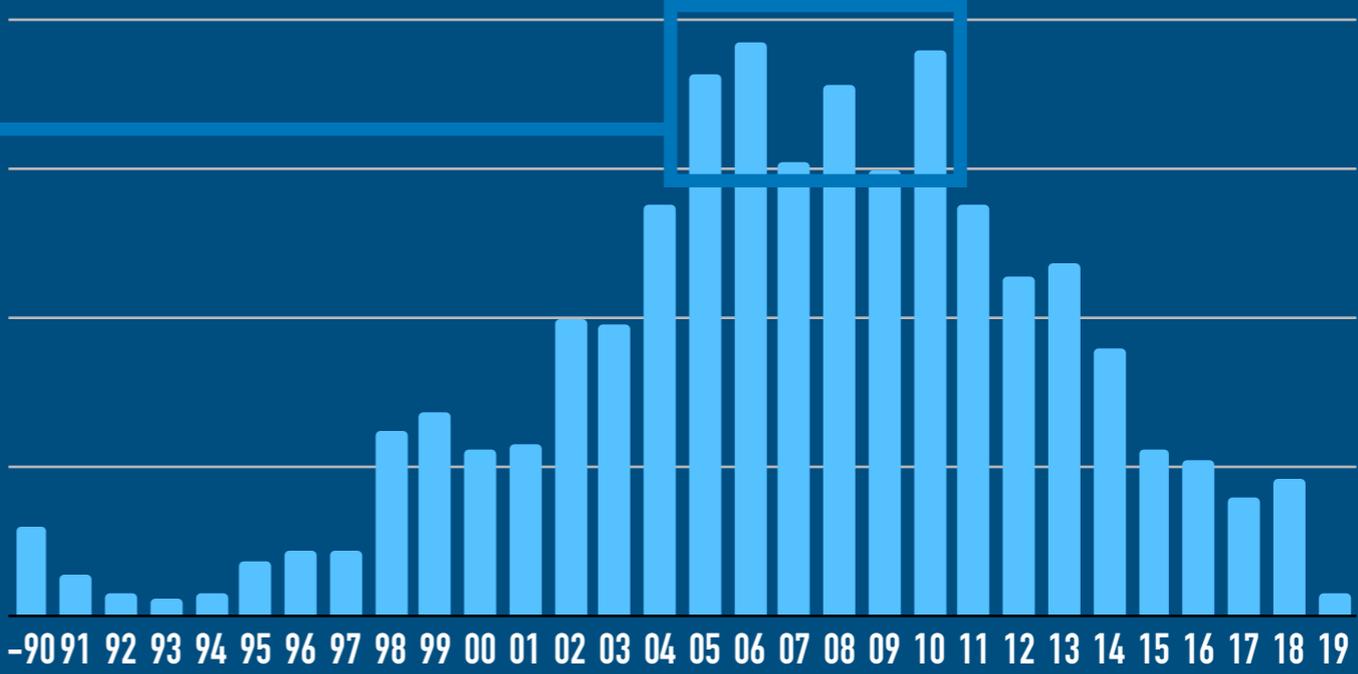
Average age when became a supporter



Age fans started to support a European Club

2005
to
2010

Peak years when most Indonesians started to follow a European club

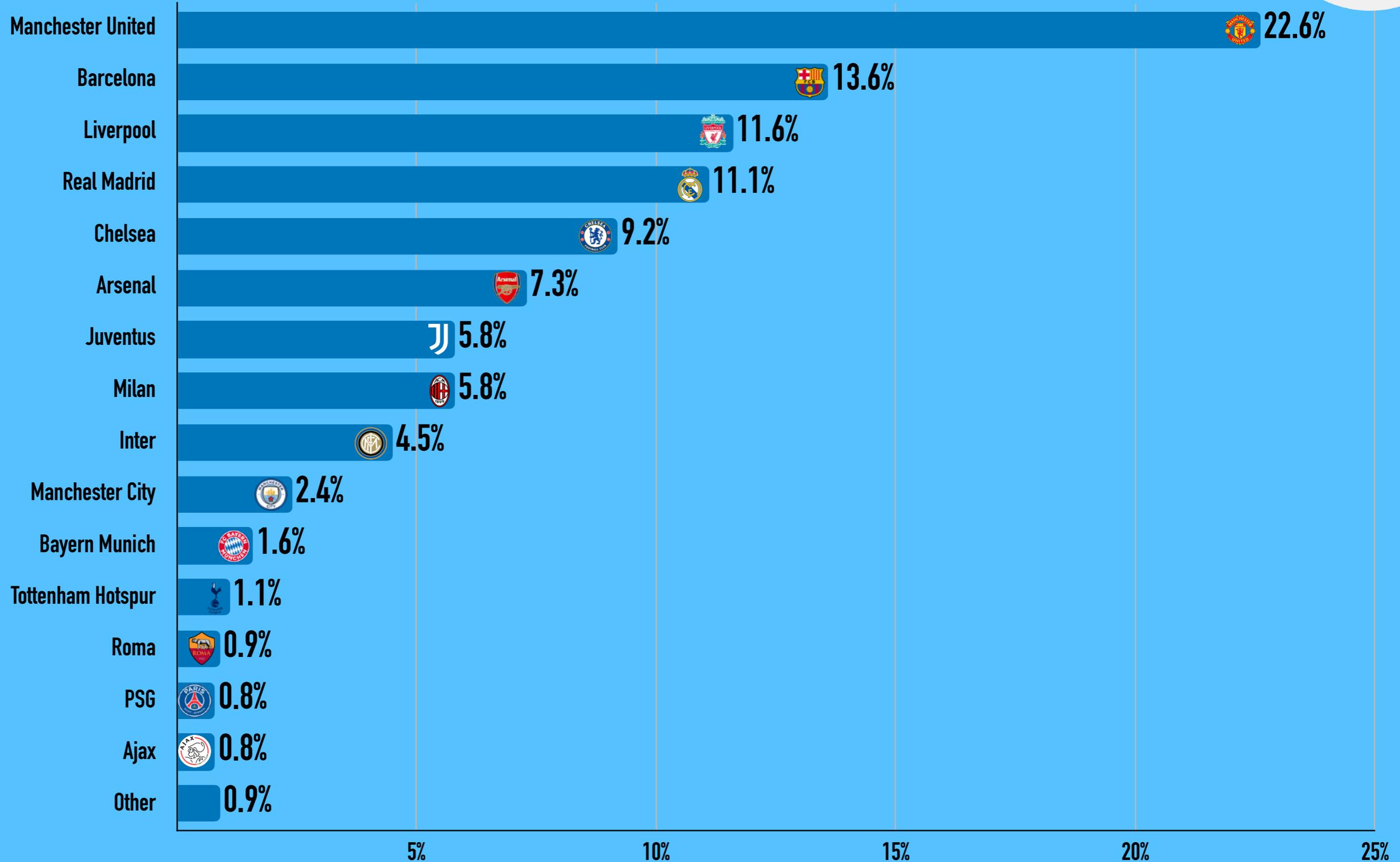


Year fans started to support a European Club

Supporting

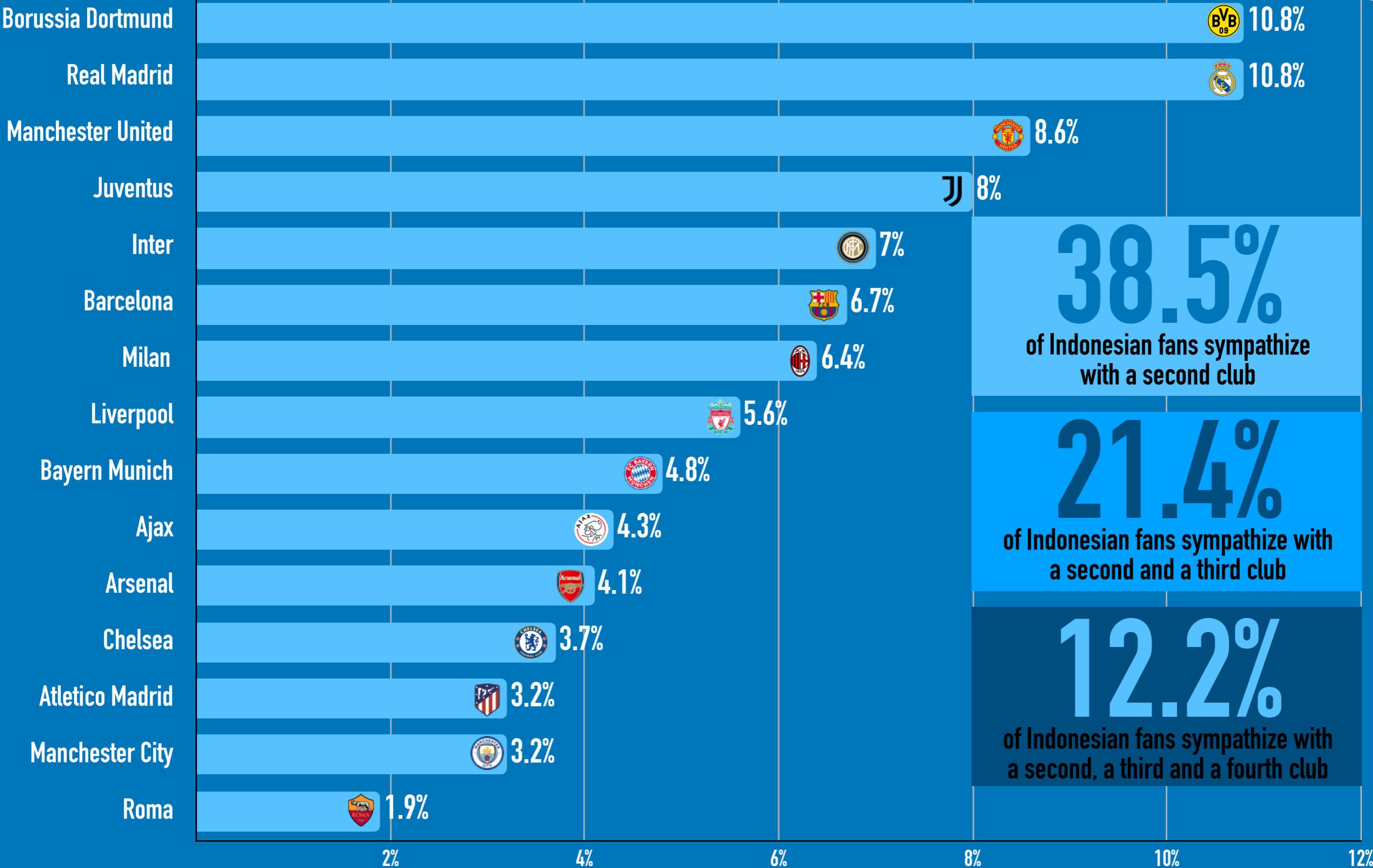


Most Supported European Clubs



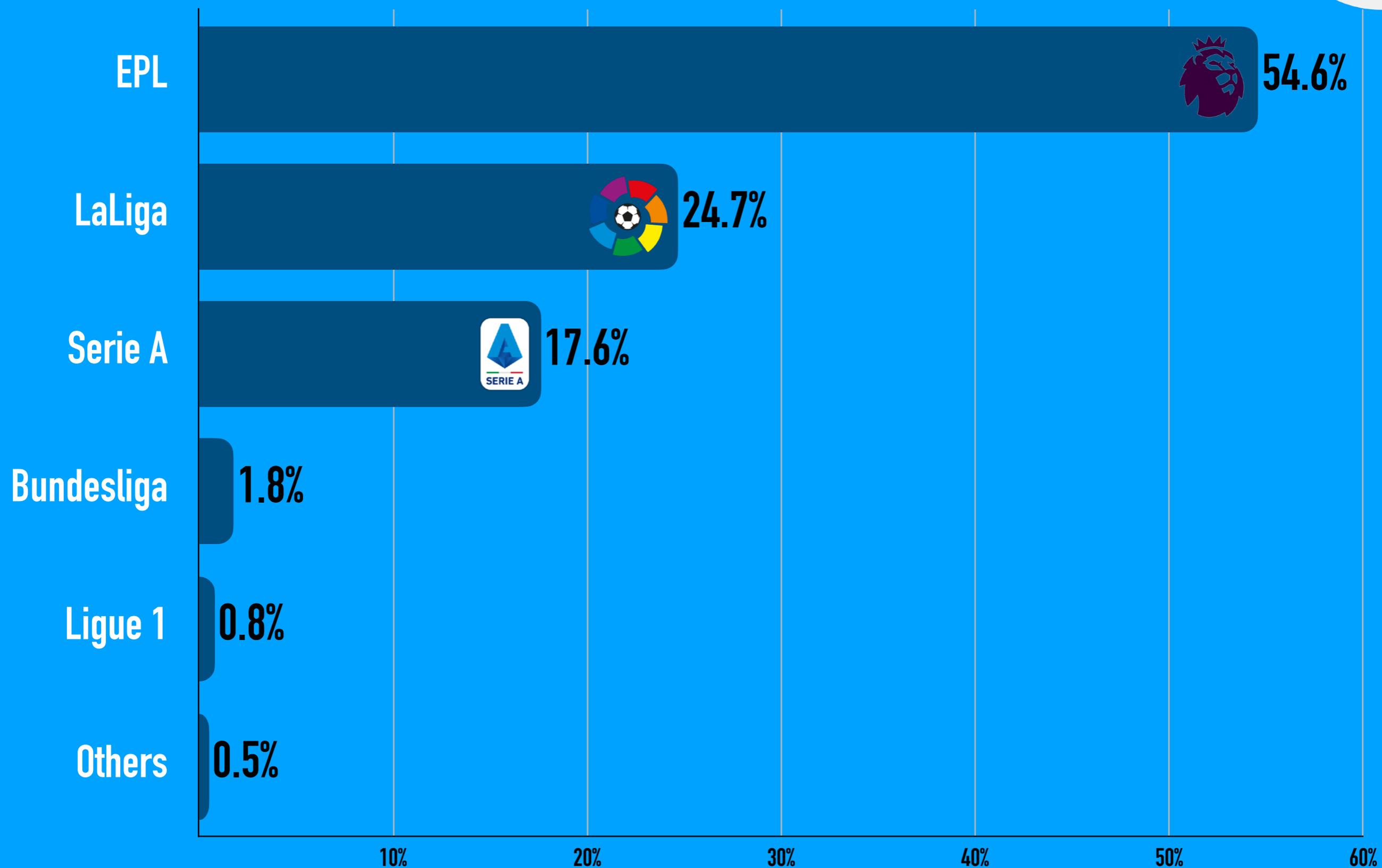
Q: Which is your favourite European Football Club?

Other Favourite Clubs



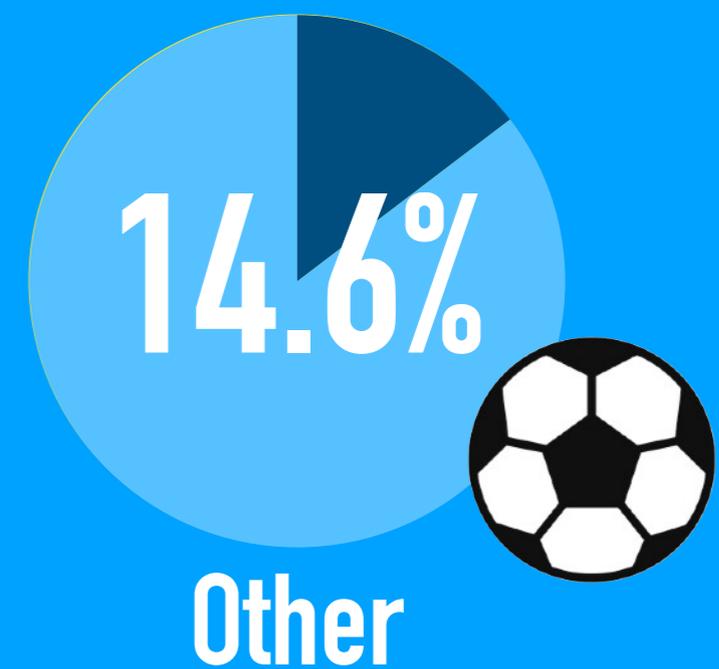
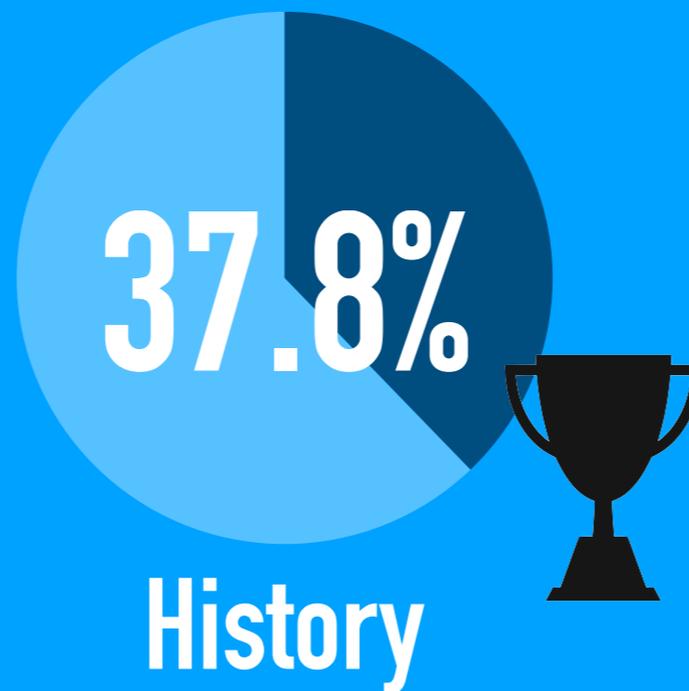
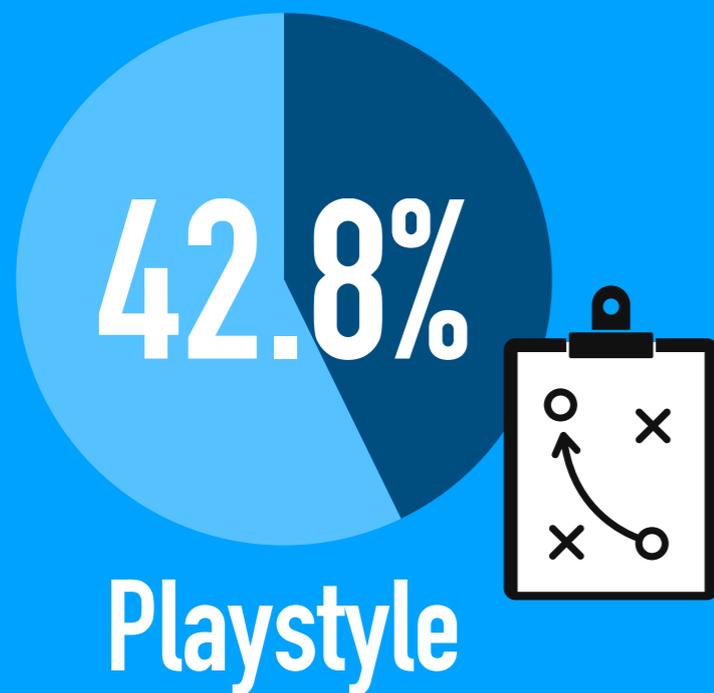
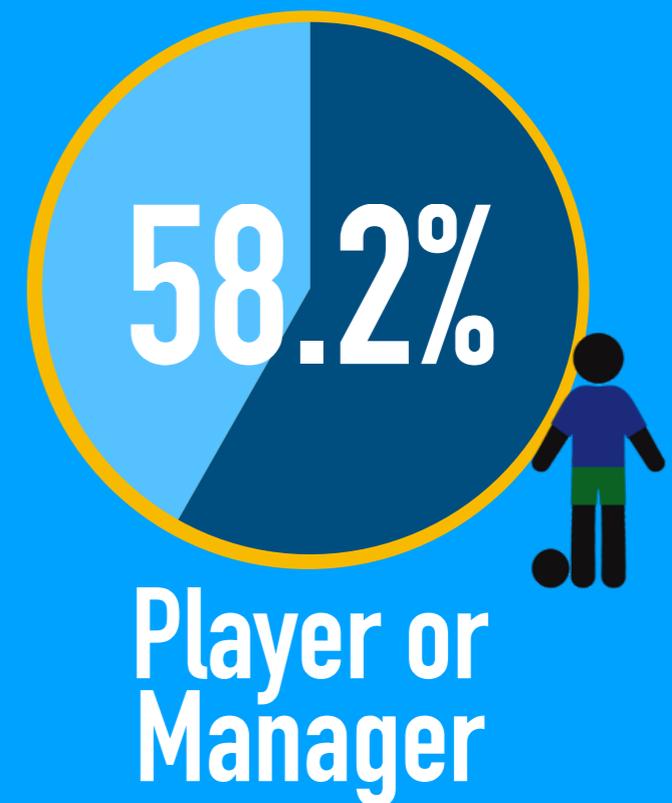
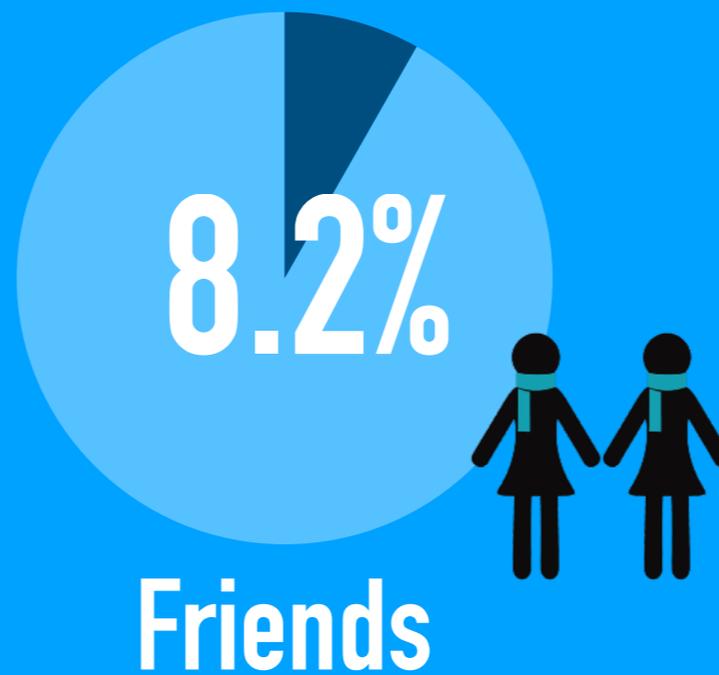
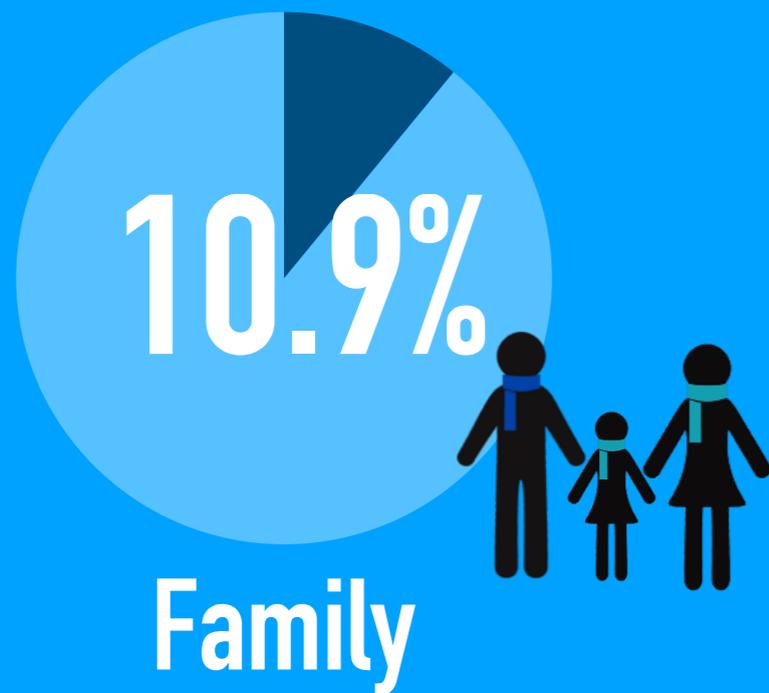
Q: Do you support any other European Football Club in other leagues? Which teams? (up to three)

Most Supported Leagues (by club)



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

Reason for Supporting a European Club

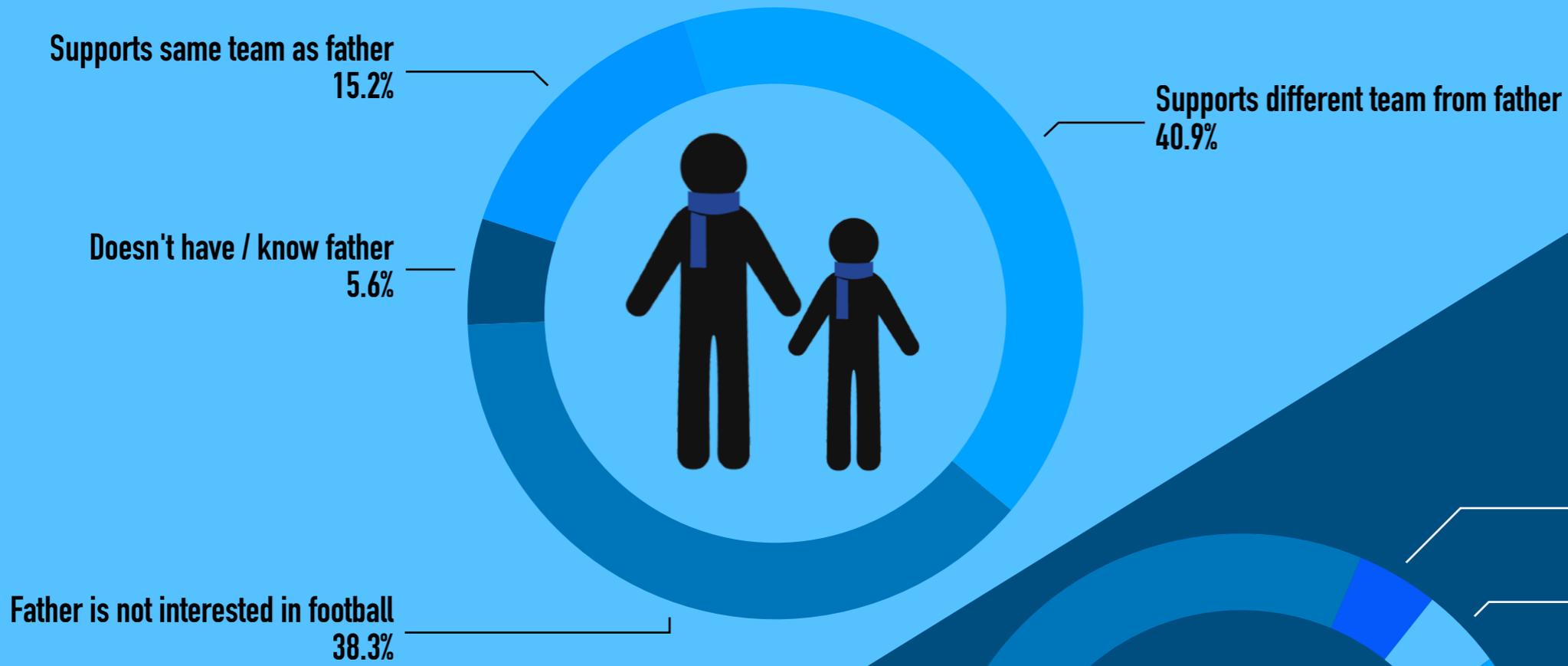


*Respondents could give multiple answers

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

Influence of Parents

Mother



Father is not interested in football
38.3%

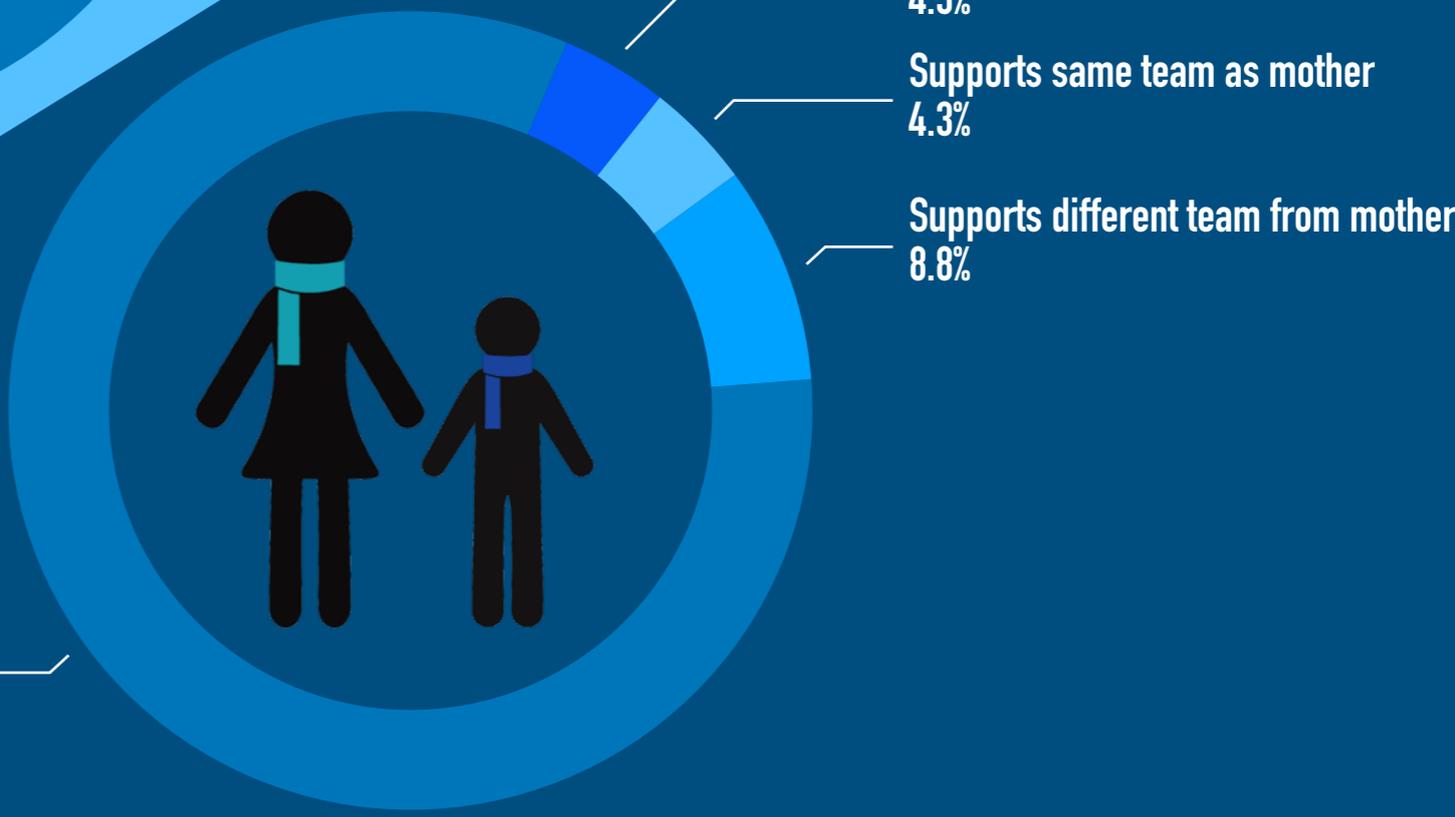
Supports different team from father
40.9%

Supports same team as father
15.2%

Doesn't have / know father
5.6%

Father

Mother is not interested in football
82.6%



Doesn't have / know mother
4.3%

Supports same team as mother
4.3%

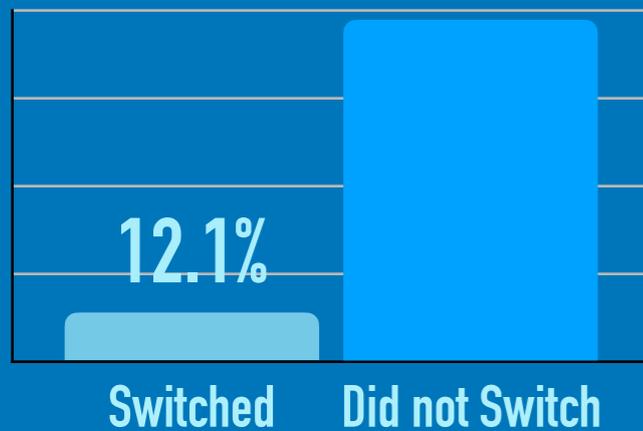
Supports different team from mother
8.8%

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

Switching Club

Supporters who have Switched to another club

87.9%



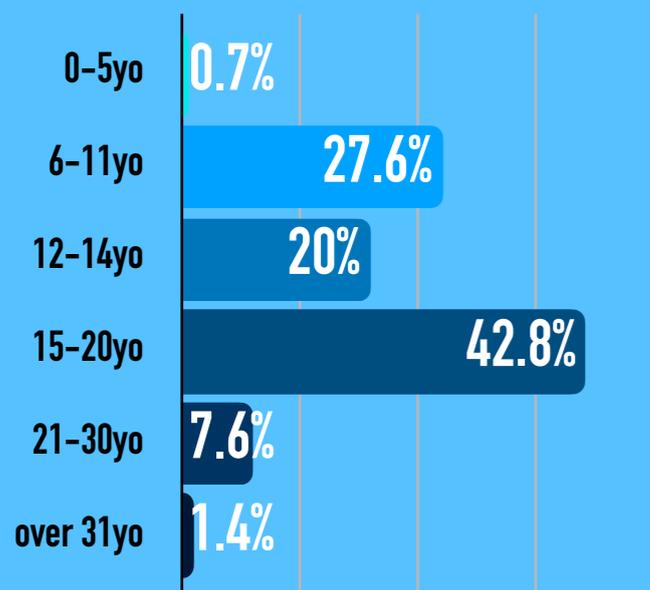
Adopted Club



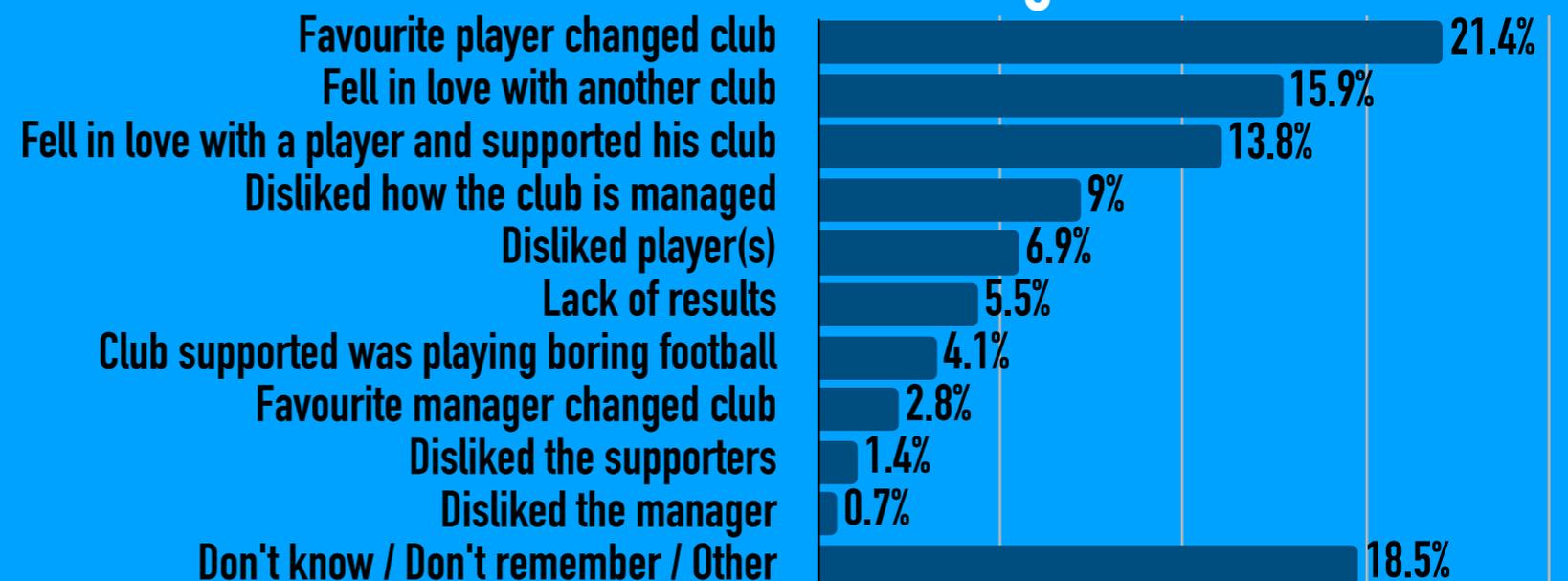
Abandoned Club



Age at which Switch happened

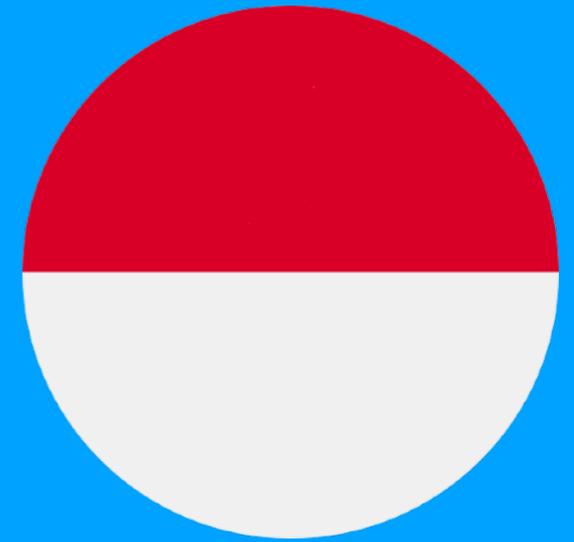


Reason for Switching

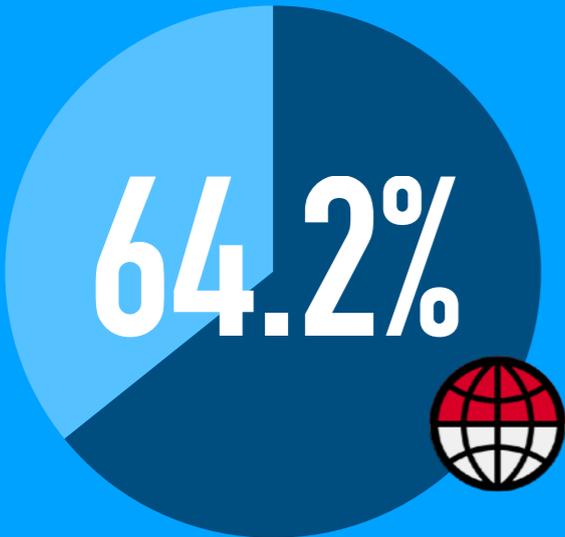


Q: Have you ever changed the European Football Club you support? If yes, why, at what age and which club did you used to support before?

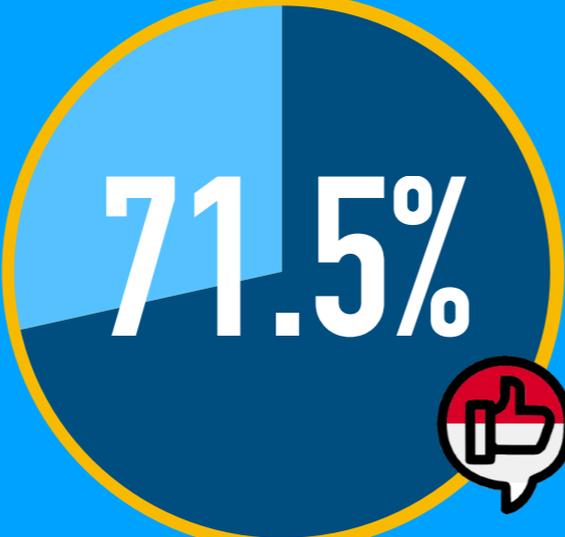
Media



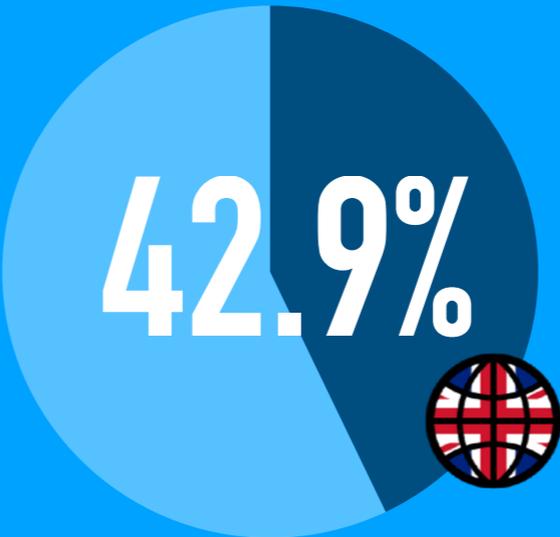
News Sources



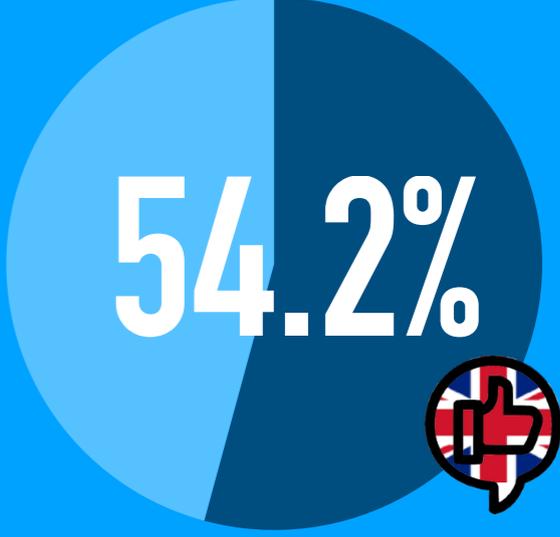
Internet News
(local language)



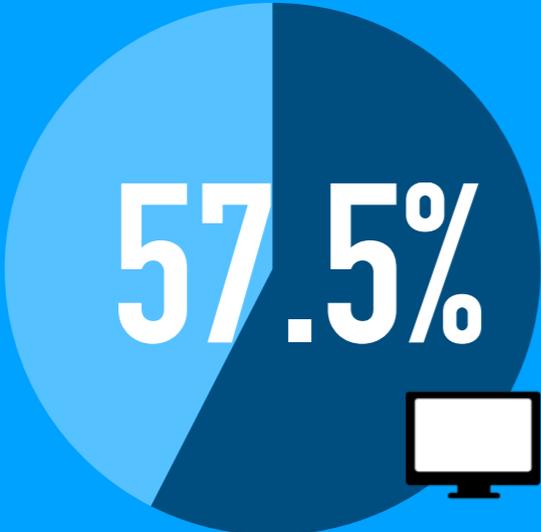
Social Media
(local language)



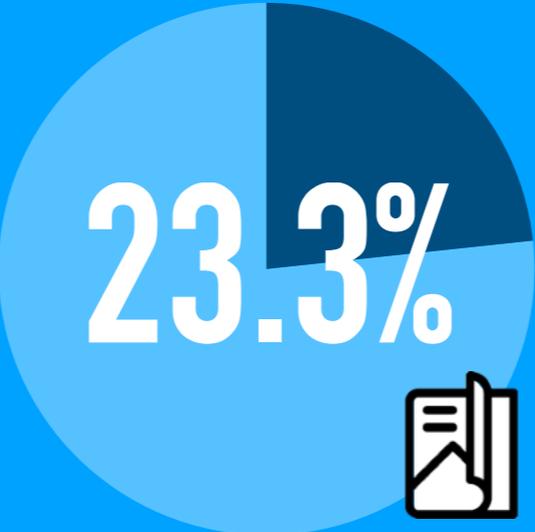
Internet News
(foreign language)



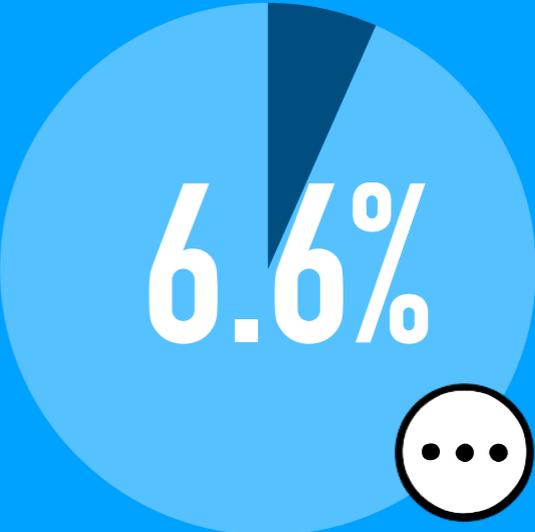
Social Media
(foreign language)



TV



**Newspapers
and Magazines**

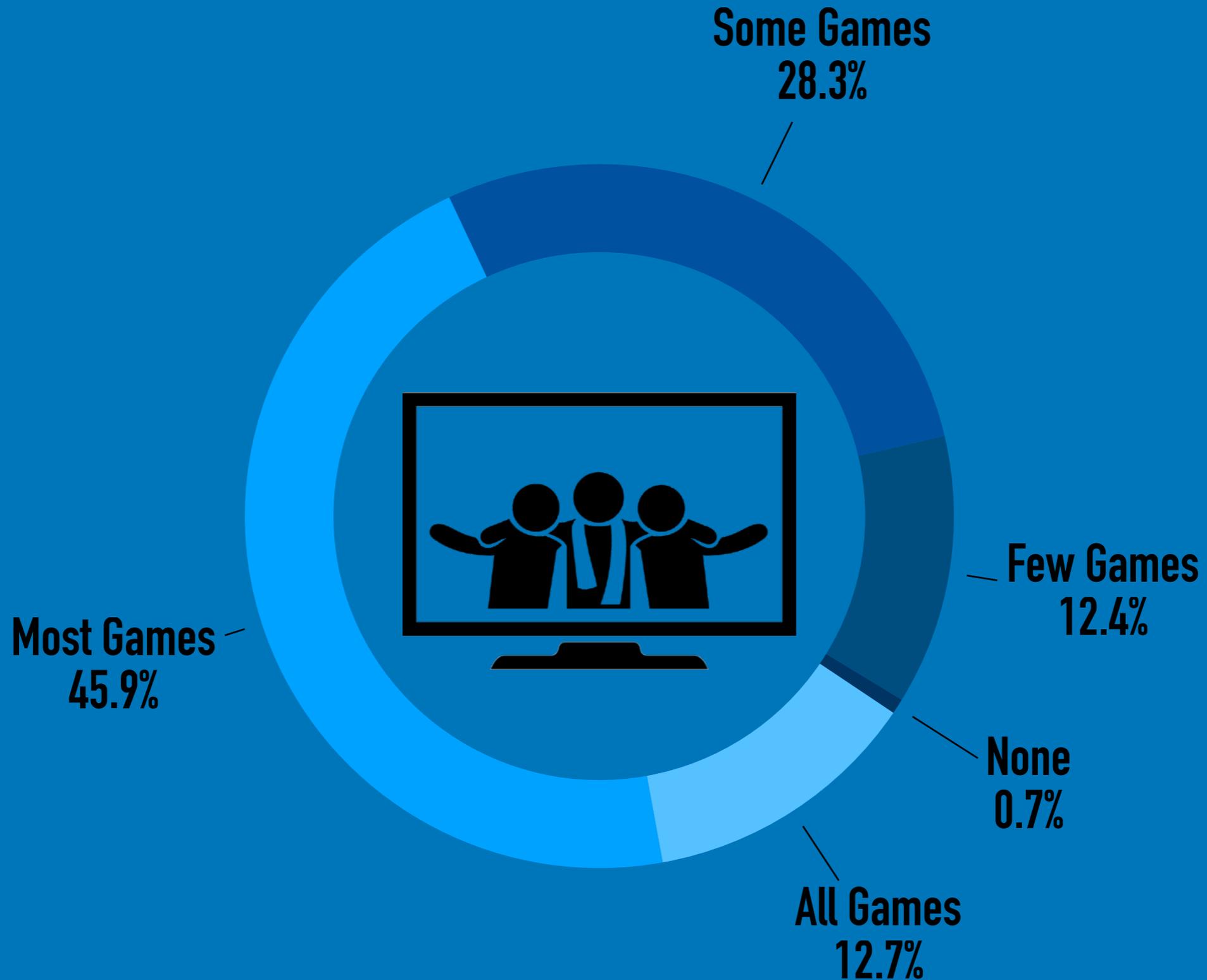


Other

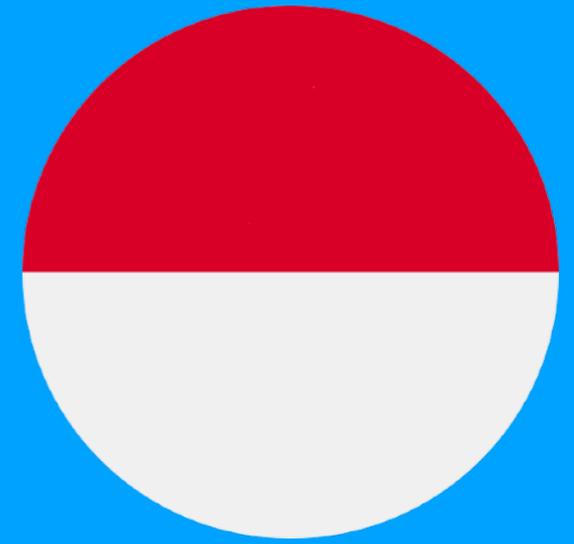
*Respondents could give multiple answers

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

Watching your Favourite Club

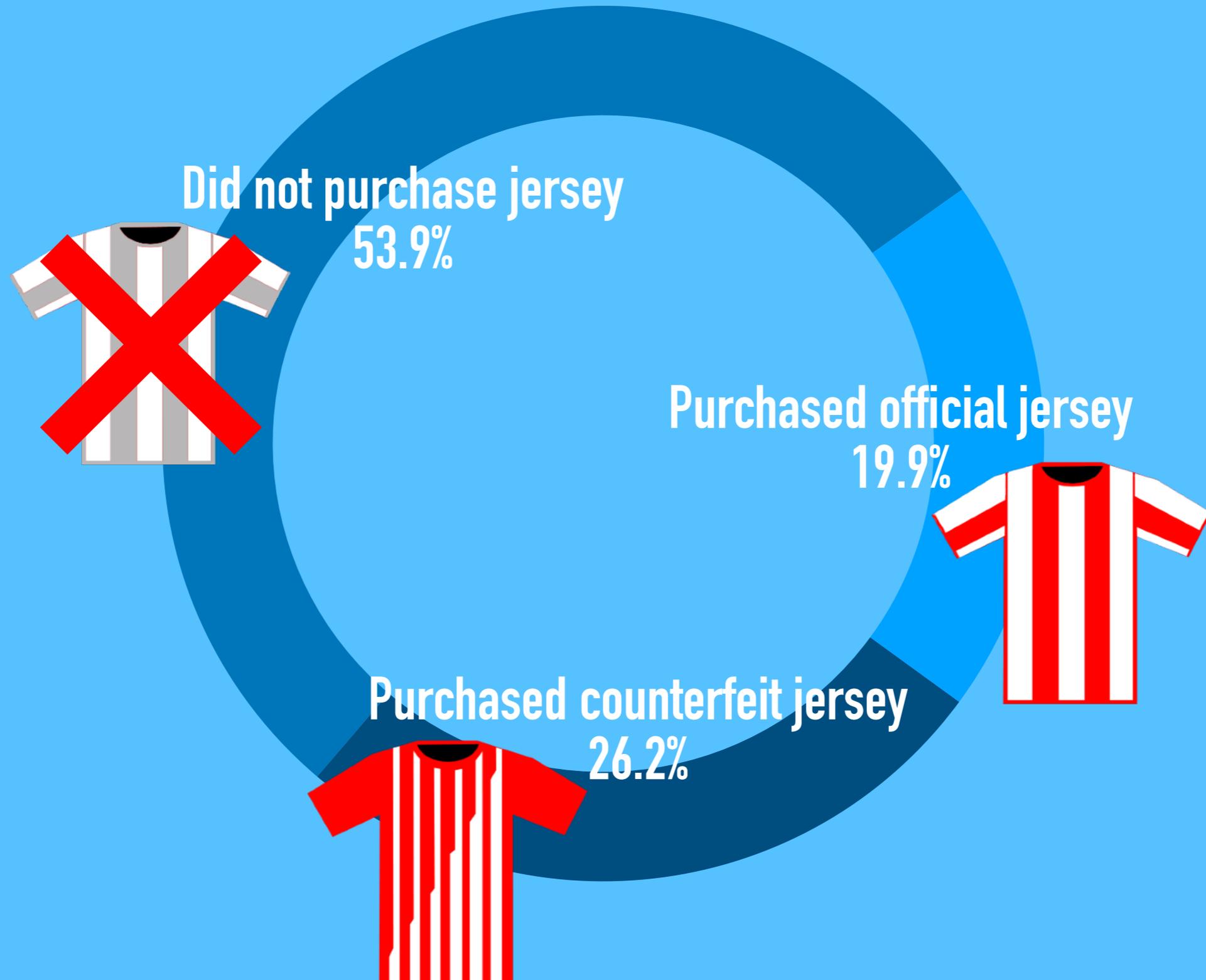


Q: How often do you watch matches of your favourite European Football Club?



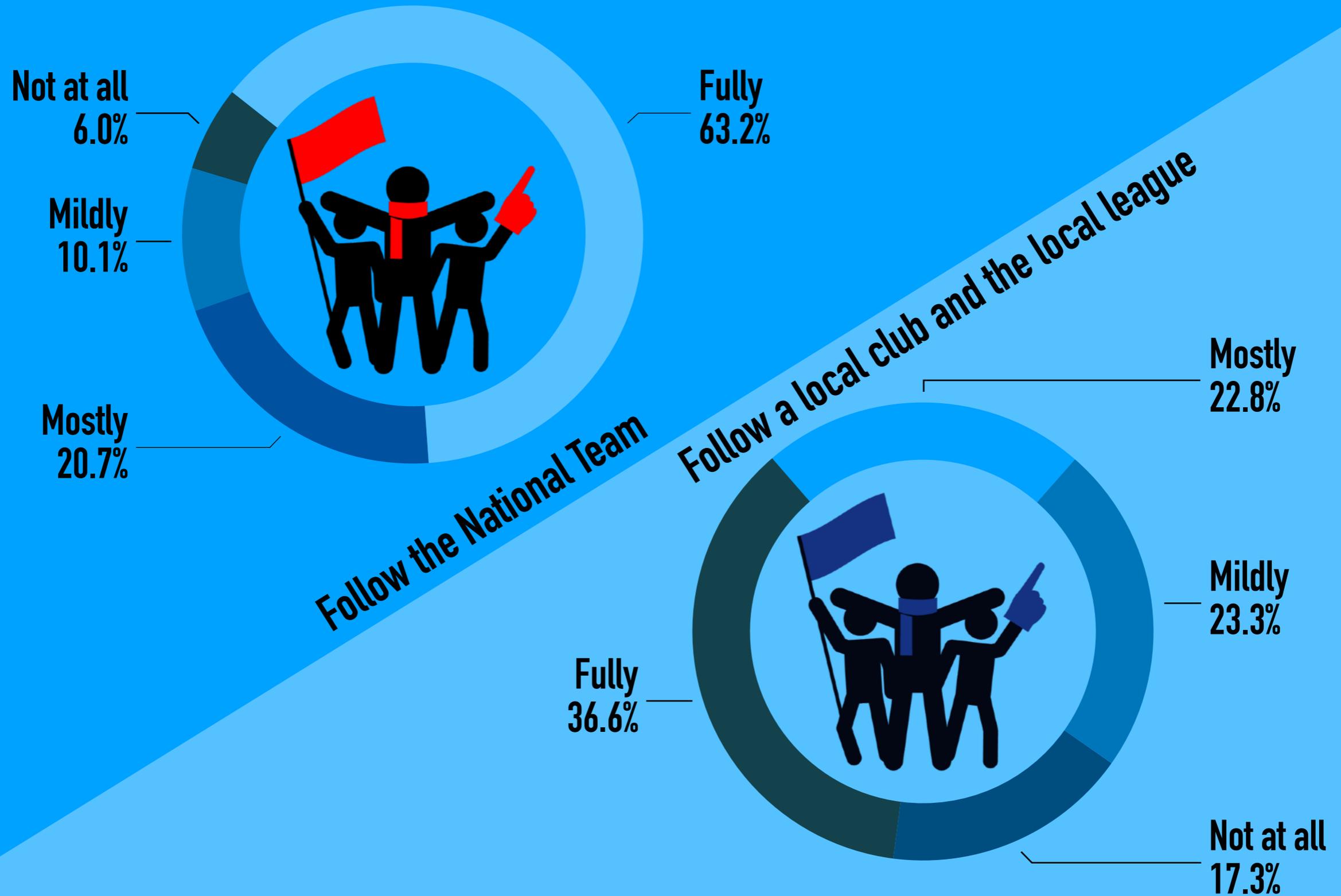
Behaviour

Purchasing Favourite Club's Jersey this Season



Q: Did you buy your favourite European Football Club's jersey this season?

Following Indonesian Football

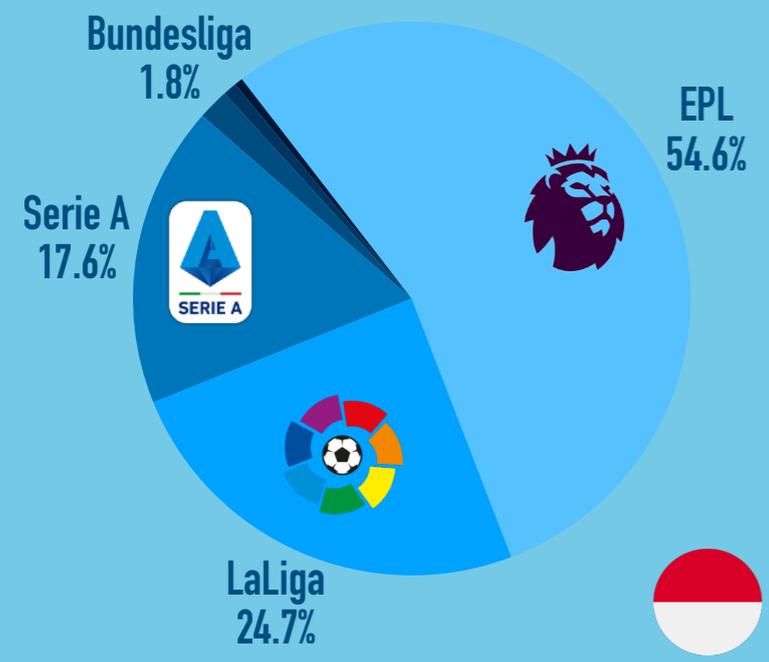


Q: Do you support your country's national teams? Do you support a local team and the local league?

Data Story

Among the countries we have analysed so far, Indonesia shows the clearest trends in terms of “generational leagues”. While the EPL clubs still has clear dominance, holding 54.6% in the overall data, it is curious to see the evolution that has enabled LaLiga to become the second favourite league for Indonesian fans.

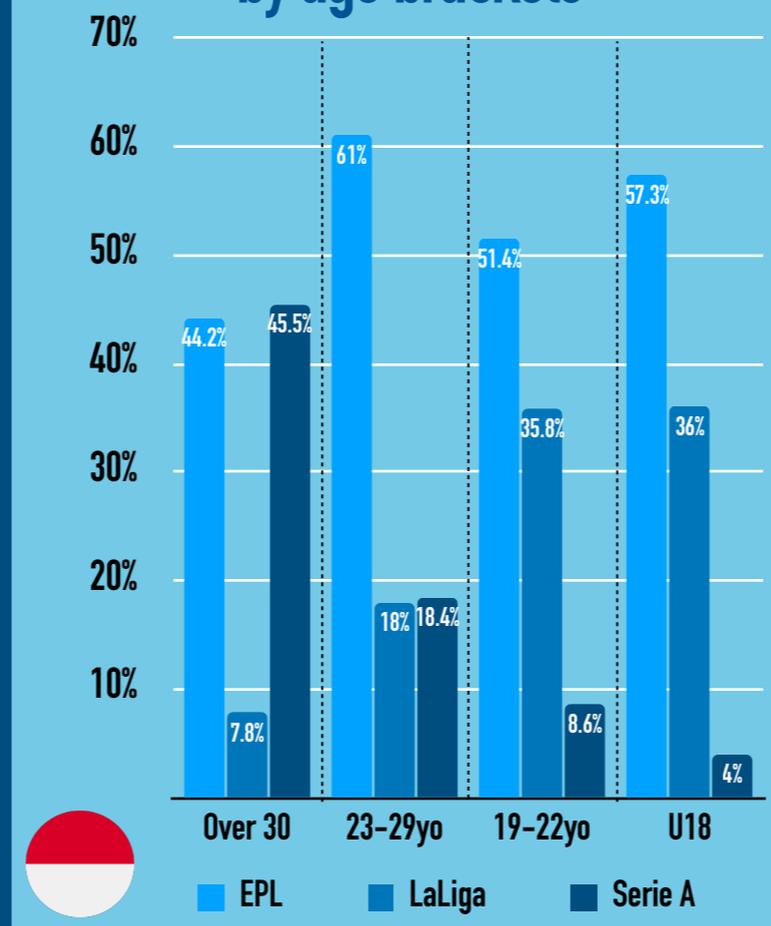
Most Supported Leagues (by club)



If we divide the fans into age segments, we soon notice that Serie A still has a solid grip on supporters over 30 – those who started following the Italian league in its golden age and never changed their allegiance. 45.5% of them are Serie A fans, as opposed to LaLiga, which has just a minority 7.8% share. However, as we look into the younger fans’ preferences we clearly notice that the trend moves from Serie A to LaLiga, while the EPL mostly remains unchanged as the leading league. With fans from 23 to 29 years old we see a big rise both in the EPL (which moves from 44.2% to an impressive 61%) and the Spanish league, which attracts 18% of supporters in that age segment. The Italian league still maintains a decent 18.4%, but receives disappointing news when we come to explore supporters under 22.

While LaLiga registers 35.8% – still significantly less than the EPL – if we look at clubs’ rankings we notice that Barcelona is the most popular among youngsters, slightly ahead of “Her Majesty” Manchester United, while Real Madrid is the third most supported club. This is a truly surprising result when compared with the solid dominance from the Red Devils in the overall data. Even so, this polarisation of LaLiga relies on Real Madrid and Barcelona’s strength and appeal, which means there is basically no space for other clubs. This phenomenon doesn’t occur with regards to the EPL and Serie A, which have a more widespread appeal over several teams.

Most Supported Leagues (by club) by age brackets



Most Supported Clubs by U21

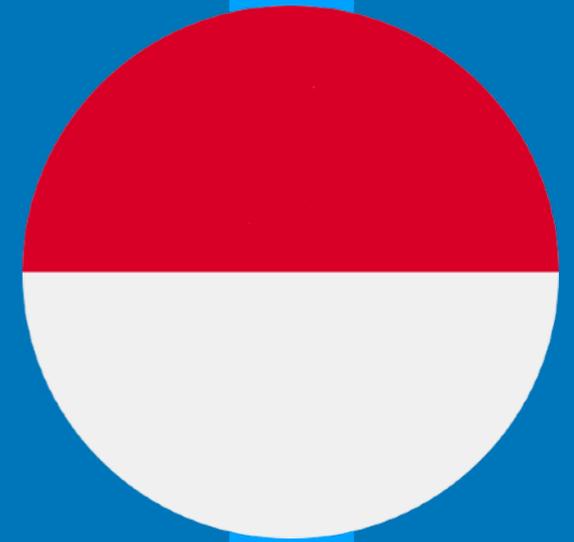


The increasing popularity of LaLiga in Indonesia is confirmed by the overall data concerning second teams: in a really fragmented scenario, Real Madrid gains a 10.8% share – which is the largest, although shared with Borussia Dortmund. If we look at people who don’t support a LaLiga team as their main club, we notice that Real Madrid is the club that gets the most “sympathy”, even more than BVB (12.8% vs. 10.7%).

Both Real Madrid and Barcelona have in Indonesia the biggest share of fans in all the countries we have analysed. Yet, there’s plenty of room for improvement and fulfilling their potential, especially in terms of engagement. LaLiga fans watch fewer games than the average in the country (52.2% watch all or most games vs. 58.6%), while 44.1% of fans bought a club shirt, genuine or counterfeit, during the last year (compared to the overall figure of 46.1%). However, the young average age of these fans proves that the best is still to come for LaLiga.

– on how LaLiga is conquering the new generations of Indonesian supporters –

Appendices



Local Voices

Arif Putra Wicaksono is one of the most successful football promoters in Indonesia. Throughout his career he has worked with Chelsea, Ajax, Sevilla, Barcelona, Roma, and Valencia among many others. We began our chat with him by trying to understand what it takes for a European club to be successful in Indonesia.

“Firstly, famous players can generate bigger interest than the clubs themselves,” he began. “However, ‘smaller’ clubs also have an opportunity if they have the intention of building long term relationships in Indonesia. ‘Smaller’ clubs have more freedom to make their own decisions with regards to how they organise activities in Indonesia, so it is easier for them to reach the Indonesian football community.”



“Based on my experience, it’s relatively easy to start a good player development program here with young Indonesian footballers, or to hold an exhibition, for example,” the 39-year-old continued. “Maybe a trial match and then become the host for Indonesian clubs who want to play overseas. But these kinds of initiatives must be carried out consistently if a European club wants to be successful in the Indonesian market. There are several ways to interact with the local football community, but finding a sister club and starting a program together is probably the most effective way to increase the benefits for both parties. Long-term co-operation and activities are necessary. Of course, another option is to foster an online relationship.”

We asked Arif to elaborate upon the importance of a digital platform. “It’s very important, because it’s the only way clubs can interact with a lot of fans together at the same time and on a daily basis. In that sense, it is essential.”

Moving on to TV rights, we asked for some insight into the situation in Indonesia. “Not all European leagues have a market in Indonesia,” he explained. “The EPL is of course number one, followed by Serie A and LaLiga. But even for the English sides, not all matches are shown. In recent years LaLiga made great promotional efforts and I think they must continue to develop on that front until one day we hope to see an Indonesian player in Spain, even if only in LaLiga Segunda División. That would be something that would catch fans’ attention. Also, as I mentioned, there is a need for more promotion, not only about the European brand but also regarding activities that bring benefits for Indonesian football development. Bundesliga undertook some of these steps, but of course the Indonesian football community wants to see consistent commitment. Without a well-rounded relationship, I think it is hard for Indonesian TV broadcasters to make an investment in the European leagues.”



Next, we asked Arif what he would do if he was in charge of a European club that wanted to break into the Indonesian market; how would he try to engage Indonesian fans, and how much time, energy and money would he invest?

His ideas were very clear, and centered upon merit. “I would use my time and investment to the maximum, because Indonesia is a big market and the future of football is promising here.”



If I was a European club I would look to choose an Indonesian club with similar characteristics to mine and which has a huge fanbase to co-operate with as a “sister club”. I’d start by sending a technical director to improve their playing structure as a club and a general manager to improve the management system, so they can raise the standard and the market value of both brands’ image. This step would create a high level of loyalty from fans, on top of which I would of course encourage consistent engagement in online communication with the local club. The cost of this investment would be relatively small – amounting to little more than the salaries of the staff sent to Indonesia and the few other expenses that support their activities here. But it could generate a huge income for the sponsors and both clubs.”

Arif’s drive to grow the game in Indonesia is clear, and he believes such enthusiasm is widespread across the nation. “I love how the people of Indonesia have such passion for football,” he concluded. “Even the data shows that Indonesia has the largest number of local fans in the world, the largest World Cup viewership and the most social media interactions about the UEFA Champions League.”

Top 10 Comparison Tables

Most Fans in Indonesia

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

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.



www.ganassa.jp

Our Clients

 Japan x Twitter	 Thailand, Vietnam, Singapore x Facebook, LINE, Twitter	 Japan x Twitter, Facebook, Globe	 Japan x Twitter, LINE, Globe
 Japan x Twitter	 China x Weibo, WeChat, LINE, Recycle	 Japan x Twitter, Globe	 Japan x Twitter, Facebook, Globe

Credits, Specifics, Disclaimer and Copyright

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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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