



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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Introduction

Infosummary



Four out of the five most supported clubs in Japan are playing in the English Premier League



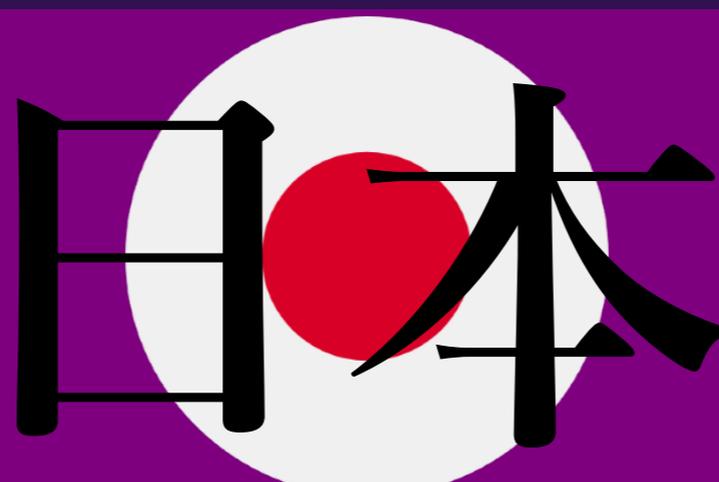
Less than one Japanese fan in 40 supports the same European club as their father



Atletico Madrid are supported by 5.7% of Japanese fans as a second favourite team. This is the Colchoneros' best result in East Asia



13.7% Almost one in seven Japanese fans supports Liverpool



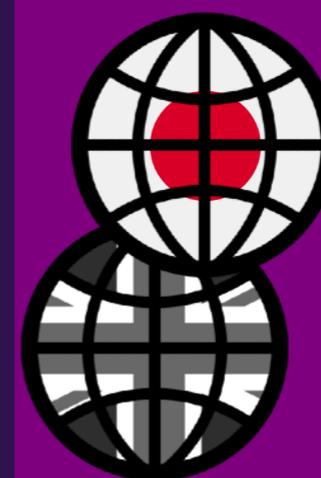
Only 1.4% of Japanese fans have bought a counterfeit jersey this season



75.1% Three Japanese out of four who support a European club also follow a local club



One Japanese fan out of 20 switches the club they support when their favourite player changes team



75.1% of Japanese fans gather information about their favourite club from websites in Japanese; while only 38.5% read news from Internet sites in English

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 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 Japan Report

Among the distinctive countries of East Asia, Japan has once again proven itself to be the most unique when it comes to football fandom of European clubs. With 25% of fans changing their favourite team and 25% supporting “smaller clubs”, Japan offers opportunities for everybody willing to enter its football market. The non-competitive, non-exclusive nature of the supporters, who are still willing and able to spend, means they are often interested in multiple clubs. This opens the door for any club capable of capturing the curiosity of local fans, who are avid consumers of news via TV, internet and social media – though all strictly in the Japanese language.



With some notable exceptions, most big European clubs are working hard to keep their Japanese fans entertained, while at the same time creating synergies with possible partners and sponsors. Clubs featuring Japanese players have a huge advantage, but there are plenty of examples of those fostering a community despite not having a direct link with Japan. Manchester City, for example, visited Japan in the summer of 2019 as the cherry on the cake of a long process of “conquering” the country, resulting in the club surpassing crosstown rivals United both on social media and in terms of number of fans. Other significant examples are Borussia Dortmund and Real Betis, two clubs that have had Japanese players and used them as catalysts to create

relationships with fans that continued after their departure. Finally, a note of merit should go to PSG for an approach that was not limited to football, but also created hype in the form of opening theme cafes and pop-up stores.



Some of the big winners when it comes to monetising popularity in Japan include Barcelona with Rakuten, Chelsea with Yokohama Tires and Juventus with Cygames. At the other end of the spectrum there is Mallorca, who, despite the presence of the most popular Japanese player, the young starlet Takefusa Kubo, did not make the most of their asset and failed to create a presence in Japan upon which to build a relationship with potential partners and sponsors.



European football is viewable online via DAZN & SKY PerfectV subscriptions, and widely promoted alongside the local league. The LINE chat and news application dominates social media for fan interaction. Traditional media such as websites and long-form content are in decline in Japan.



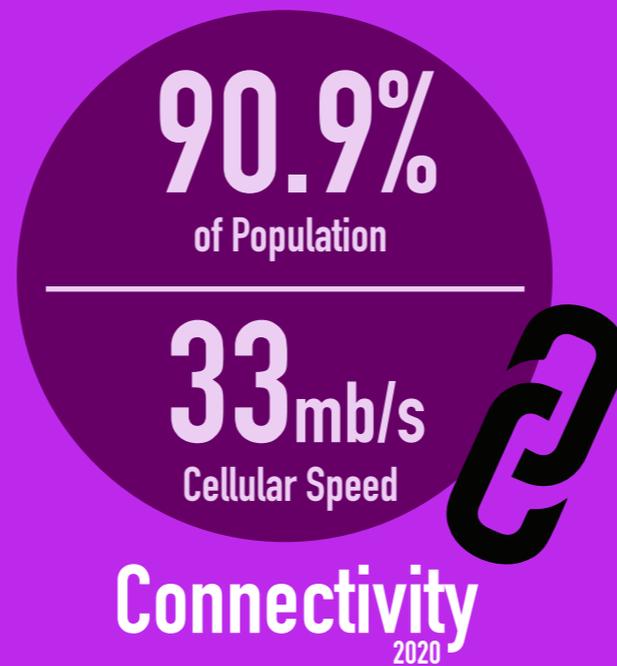
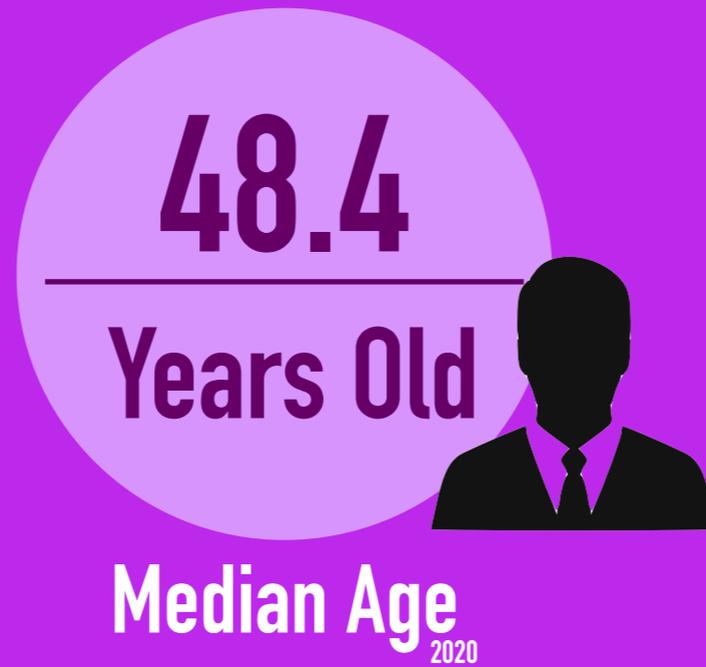
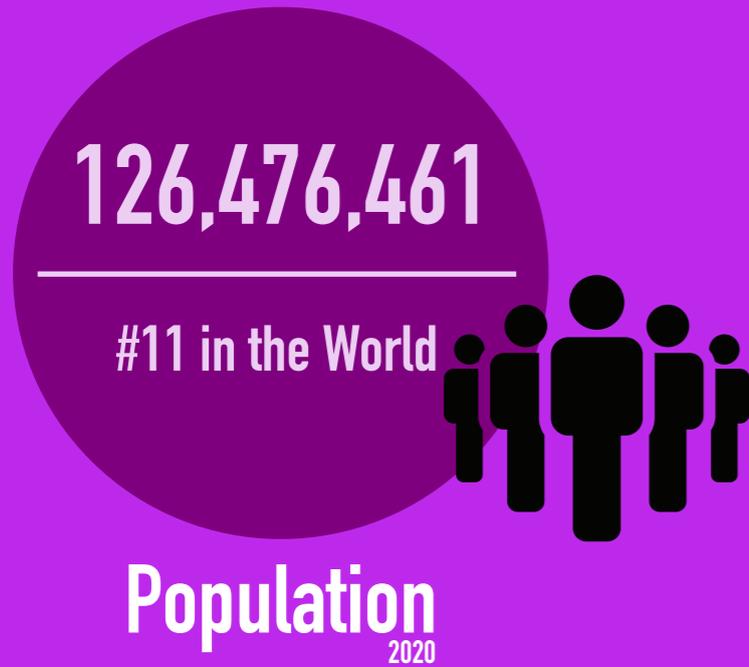
While the Japanese market is not as large as that in other Asian countries such as China, the inimitable passion for specific players can create a huge opportunity for any club in Europe. Takefusa Kubo, who made Mallorca the third most popular LaLiga club on YouTube, is the latest example. Villarreal, who he will play for in the 2020/21 season, have been gifted a golden ticket to engage with a large Japanese audience, should they desire to do so.

CANASSA



Demographics

Japan at a Glance

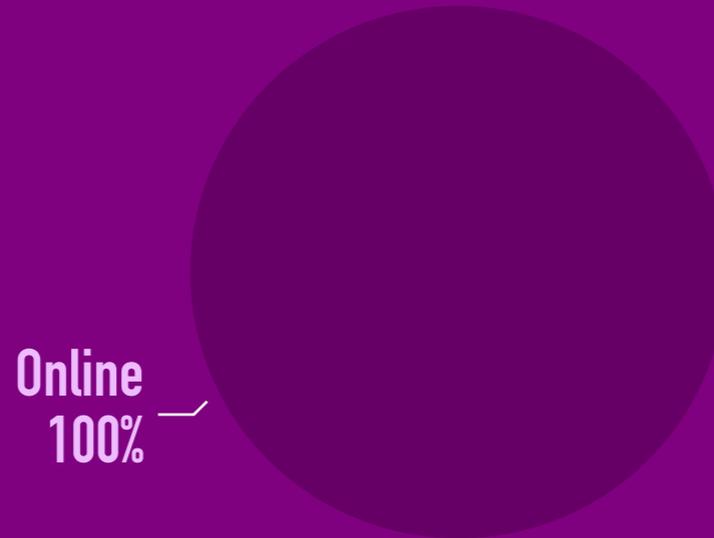


Sources: Worldometers, Knoema World Data Atlas, International Telecommunication Union, Opensignal, IMF

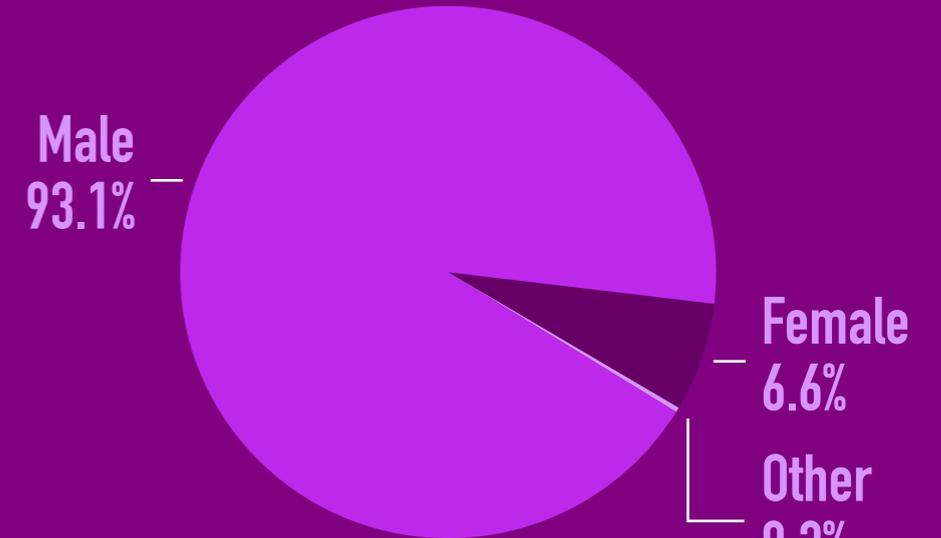
Survey's Respondents



Average Age

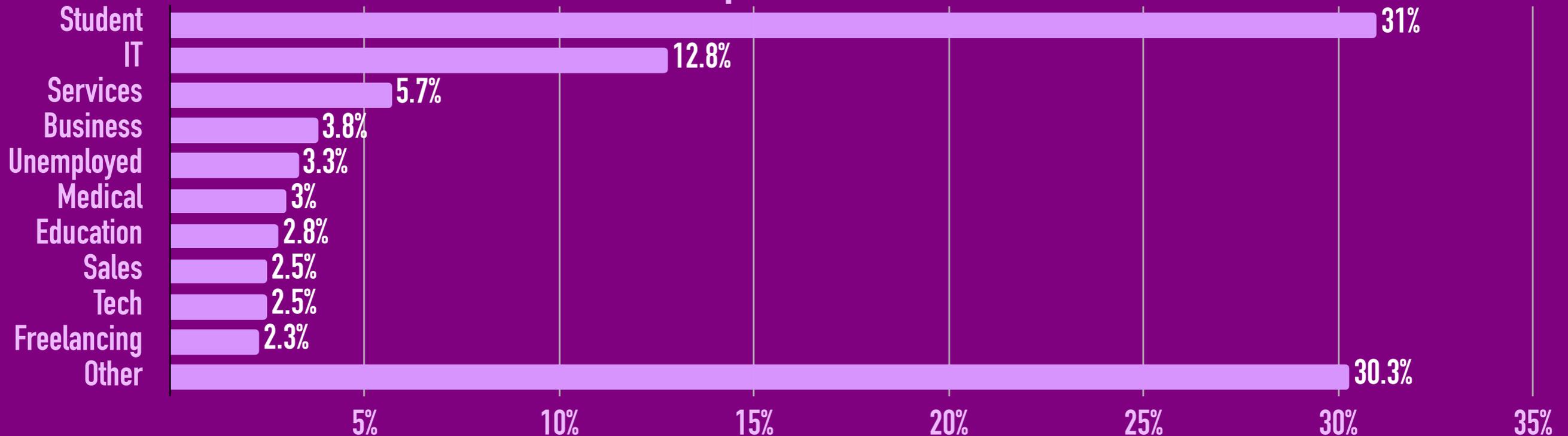


Source*



Gender

Occupation



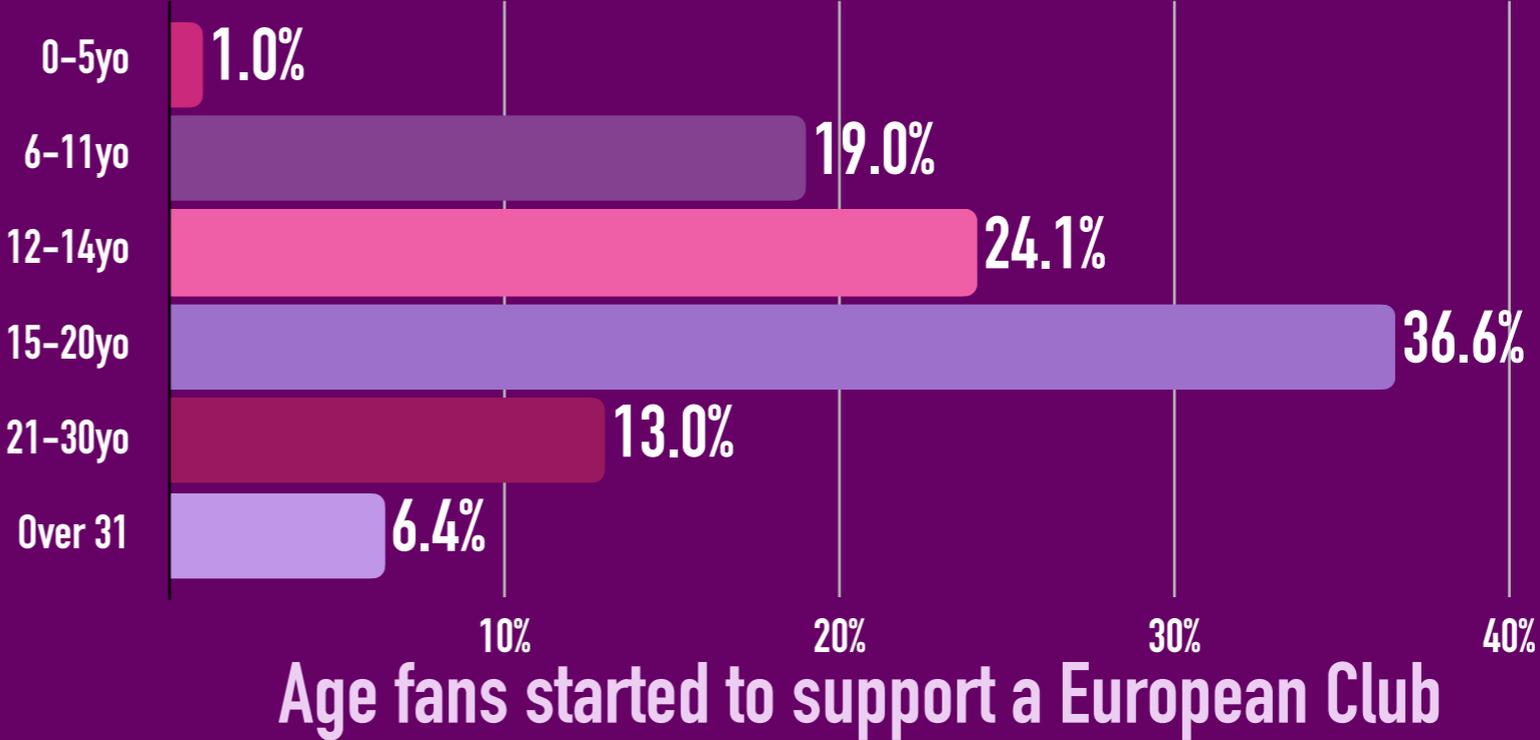
*Street survey had to be canceled due to COVID-19 outbreak

Age of Respondents



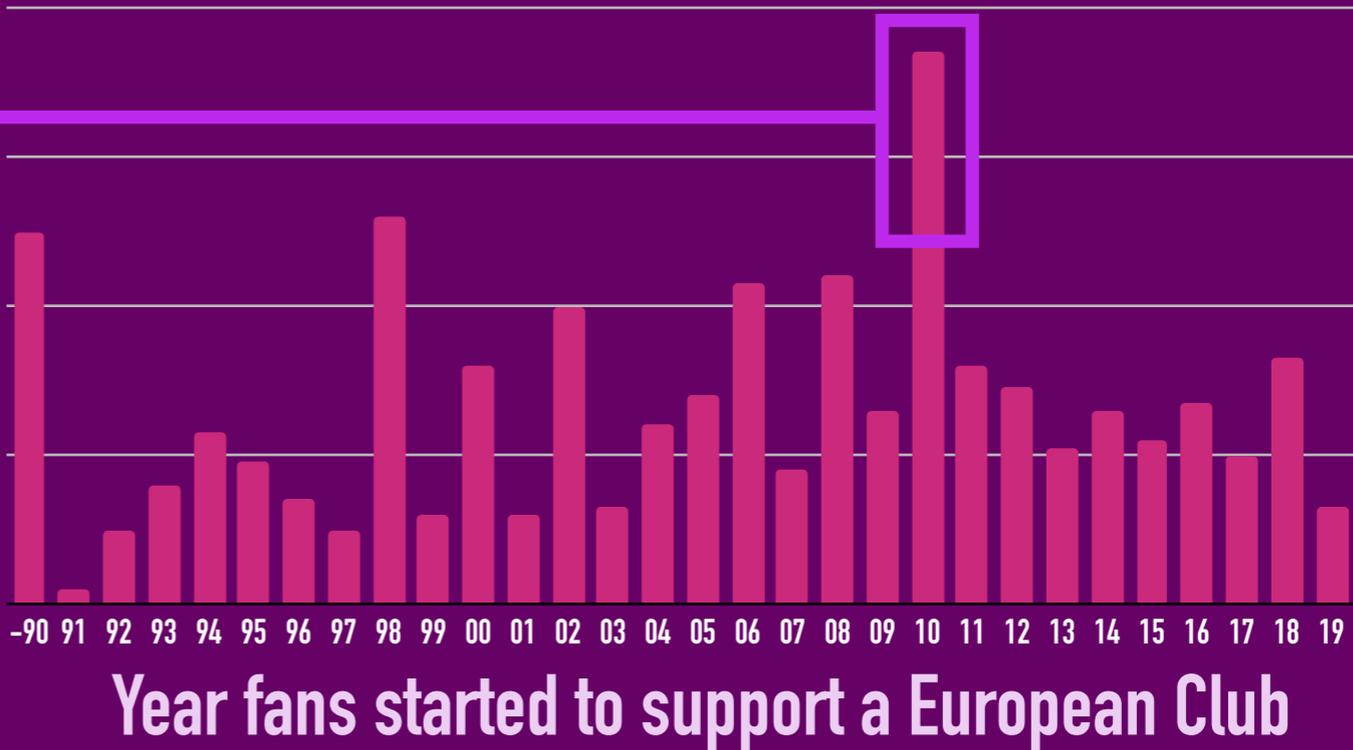
17
Years Old

Average age when became a supporter



2010

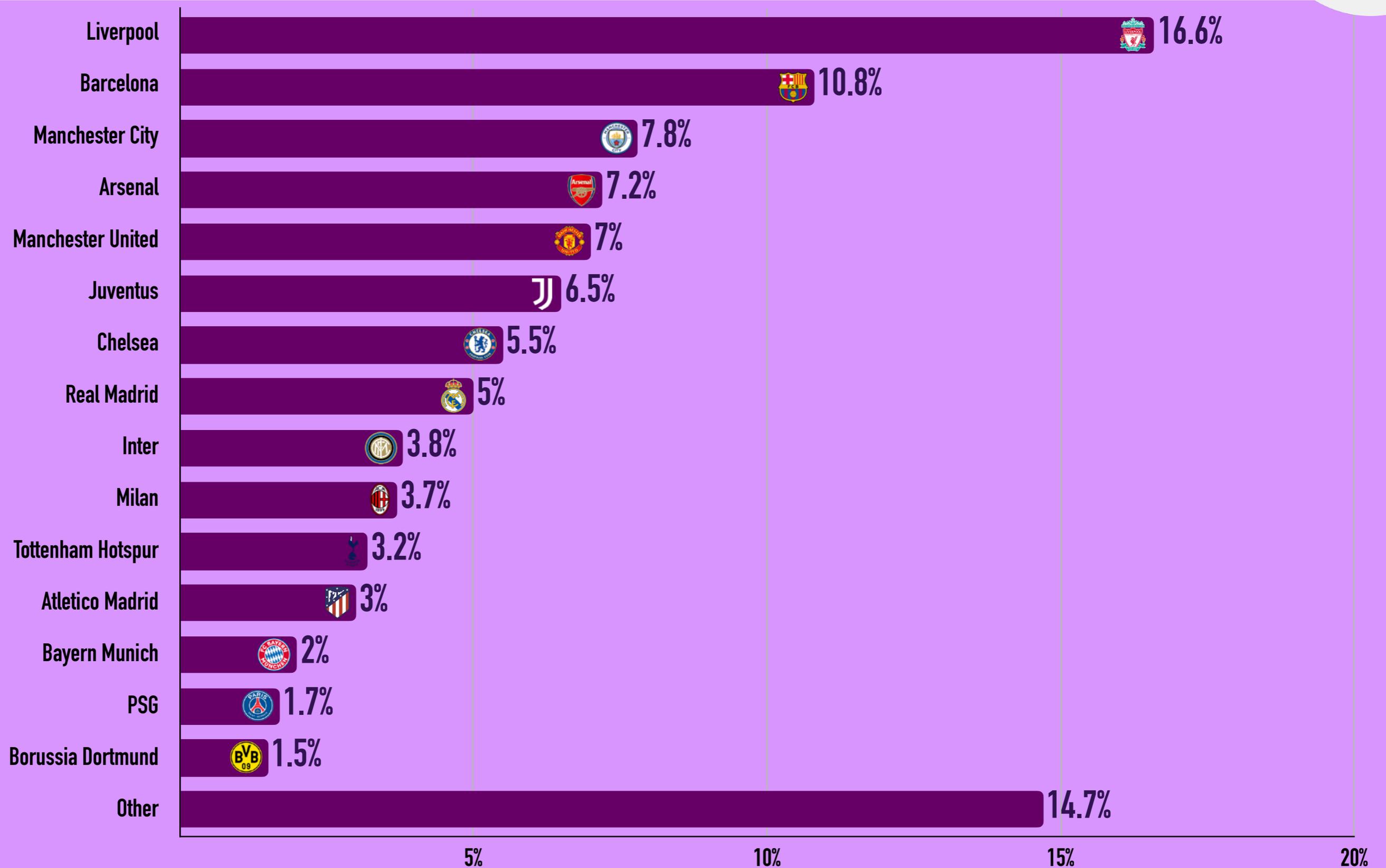
Peak year when most Japanese started to follow a European club



Supporting

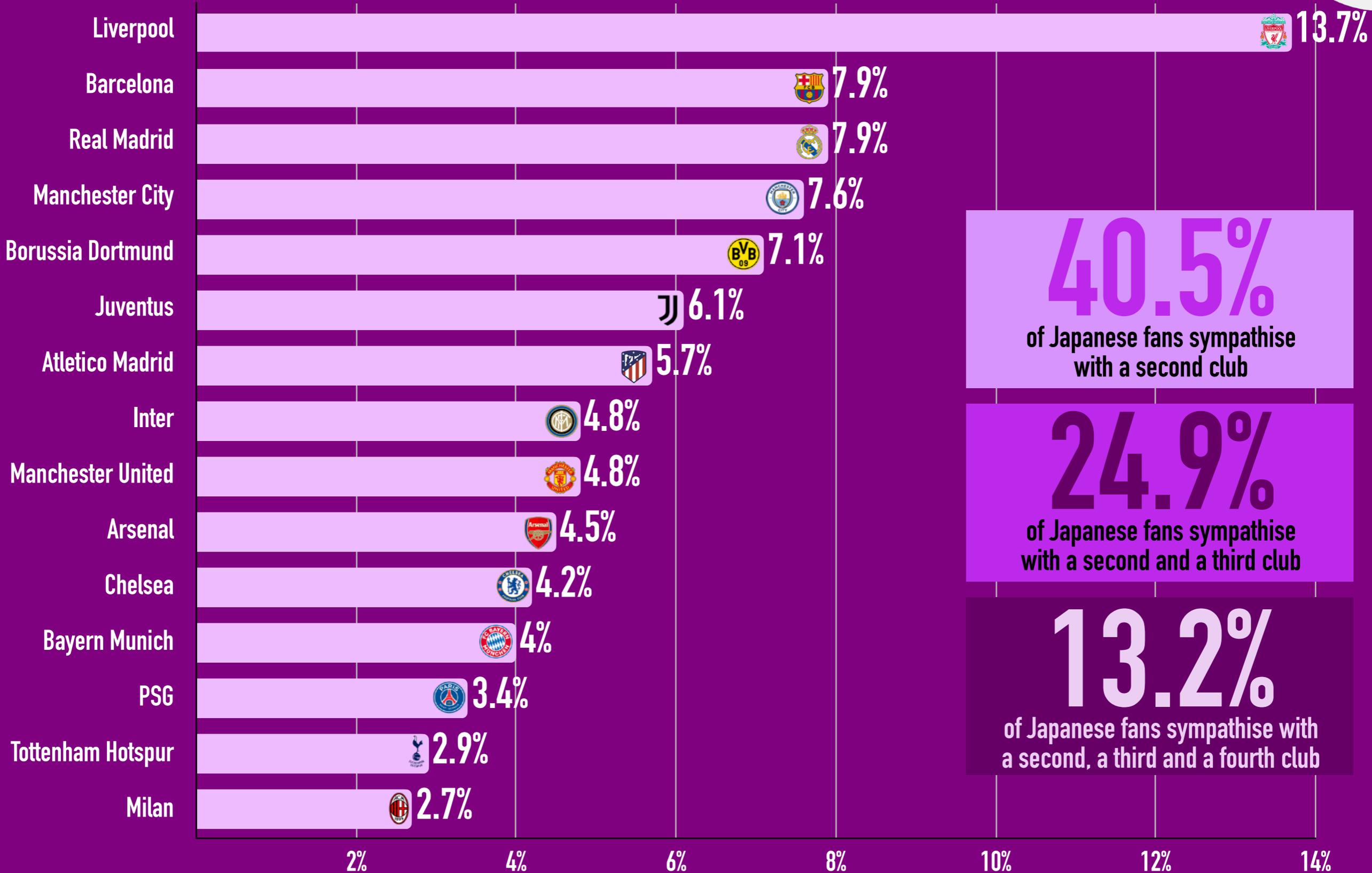


Most Supported European Clubs



Q: Which is your favourite European Football Club?

Other Favourite Clubs



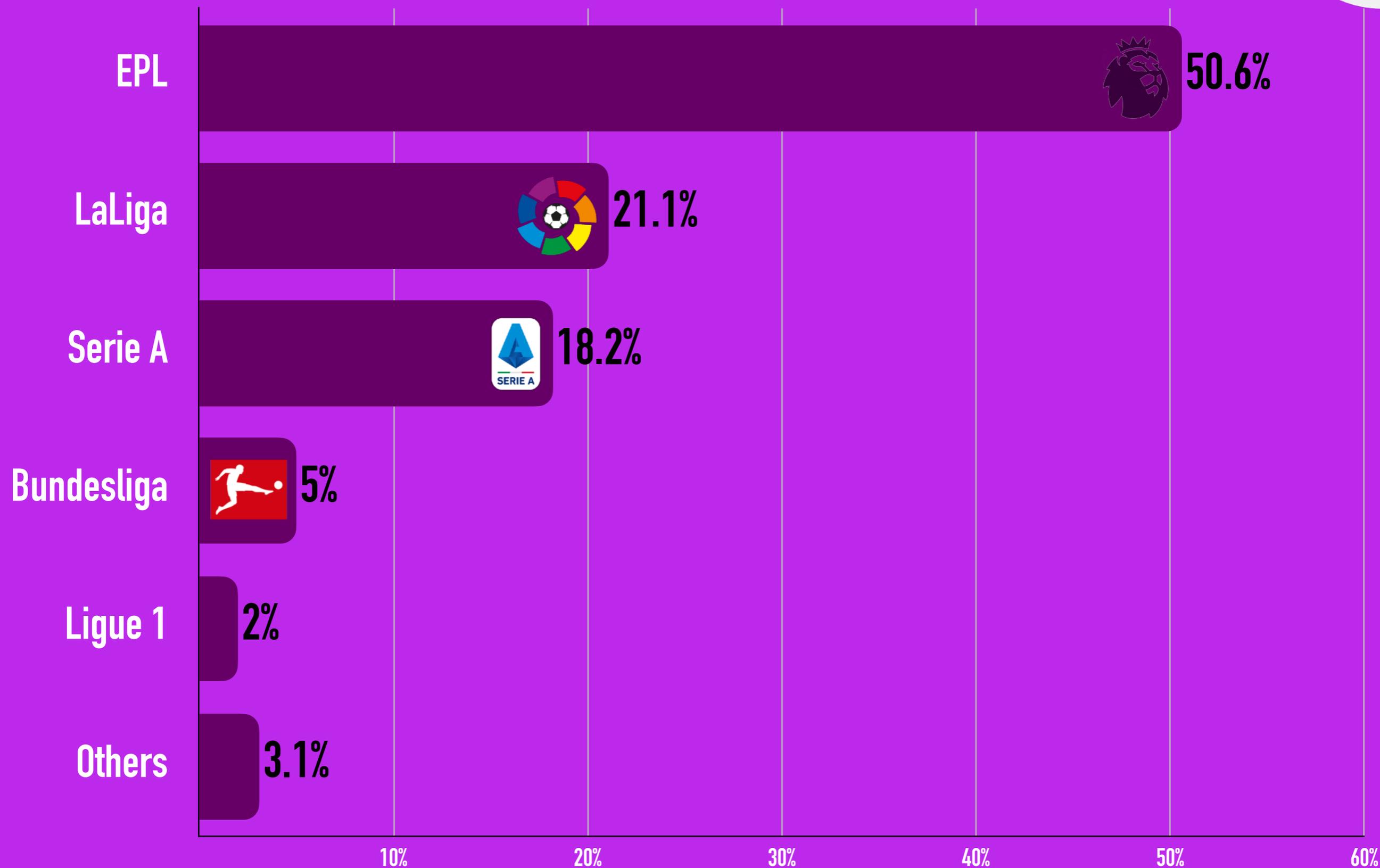
40.5%
of Japanese fans sympathise with a second club

24.9%
of Japanese fans sympathise with a second and a third club

13.2%
of Japanese fans sympathise with a second, a third and a fourth club

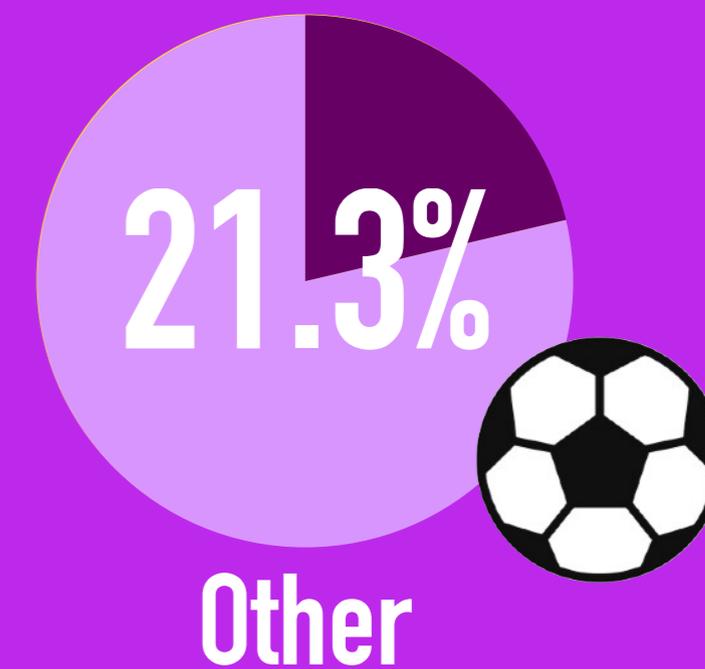
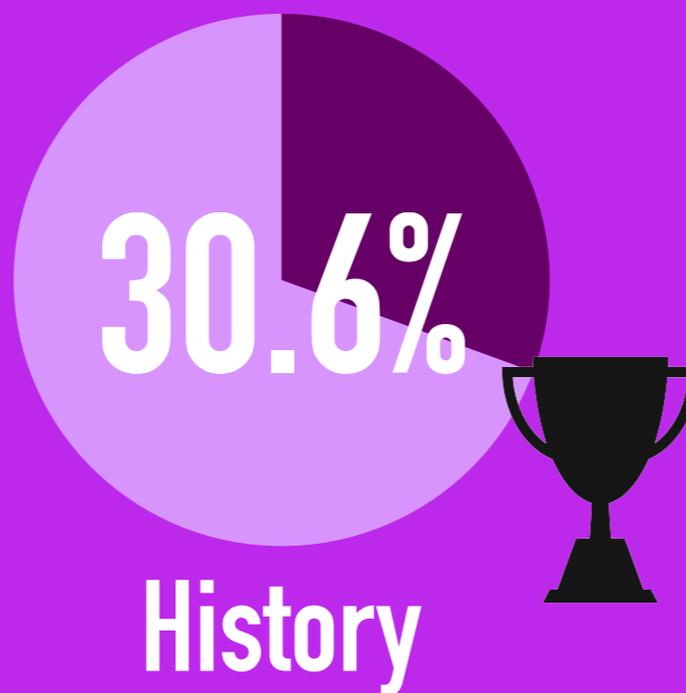
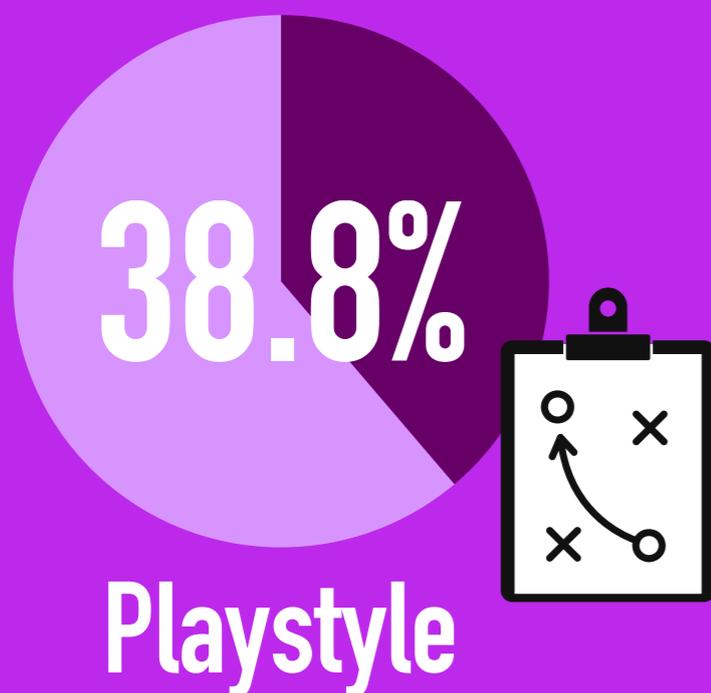
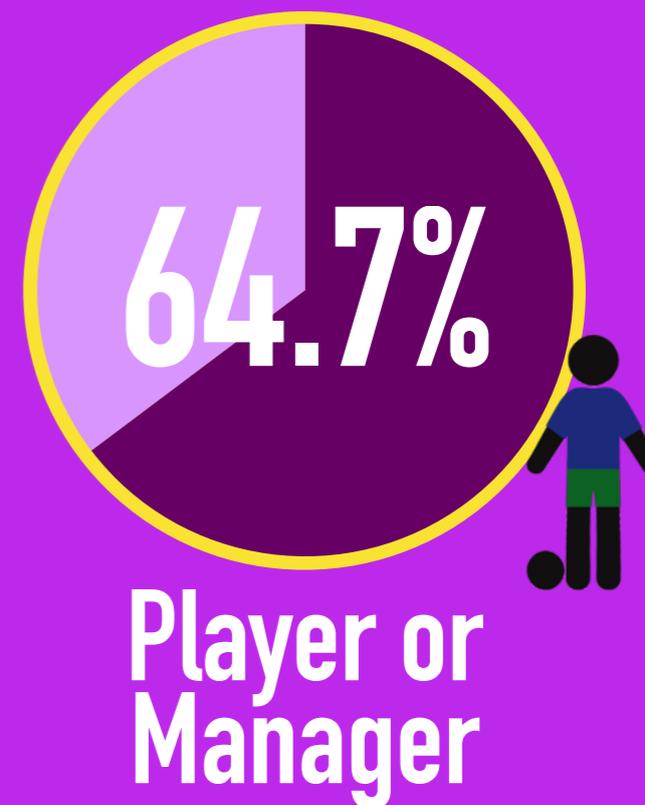
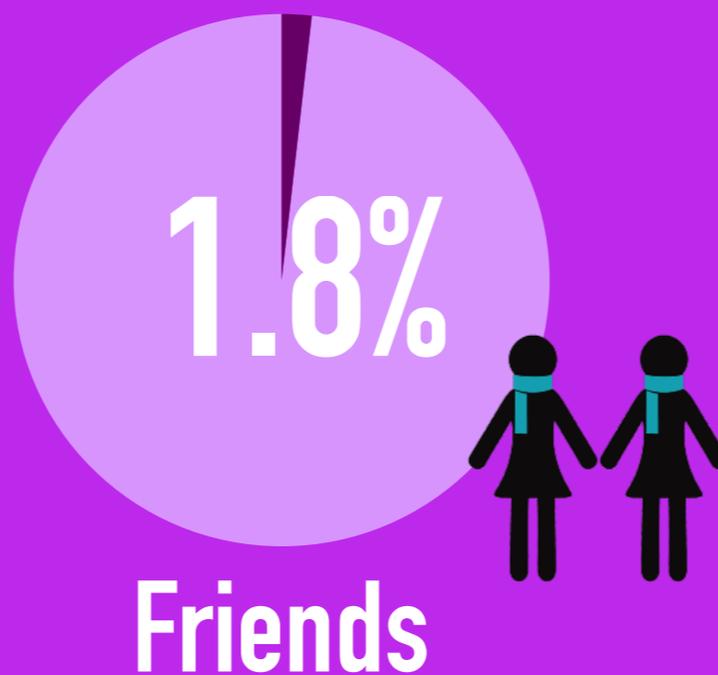
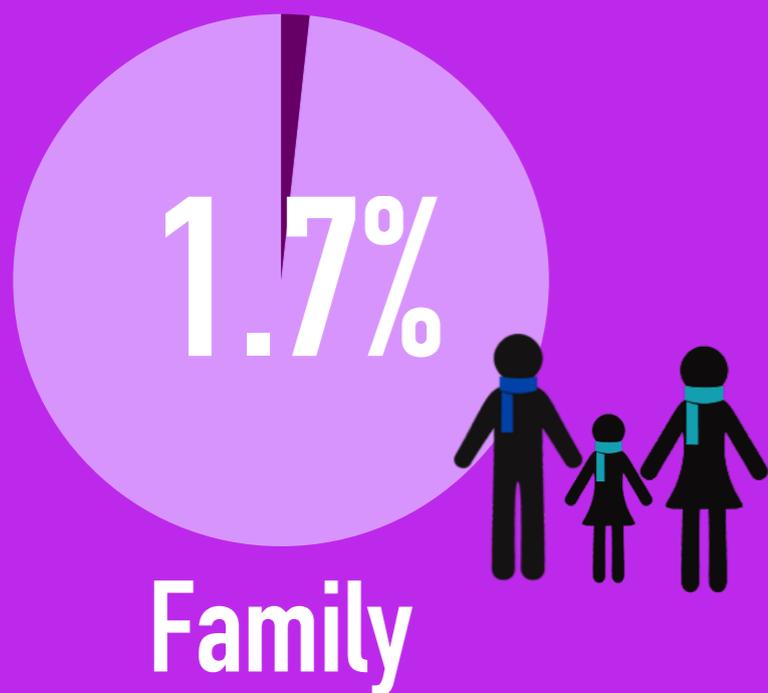
Q: Do you support any other European Football Club in other leagues? Which teams? (up to three)

Most Supported Leagues (by club)



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

Reason for Supporting a European Club

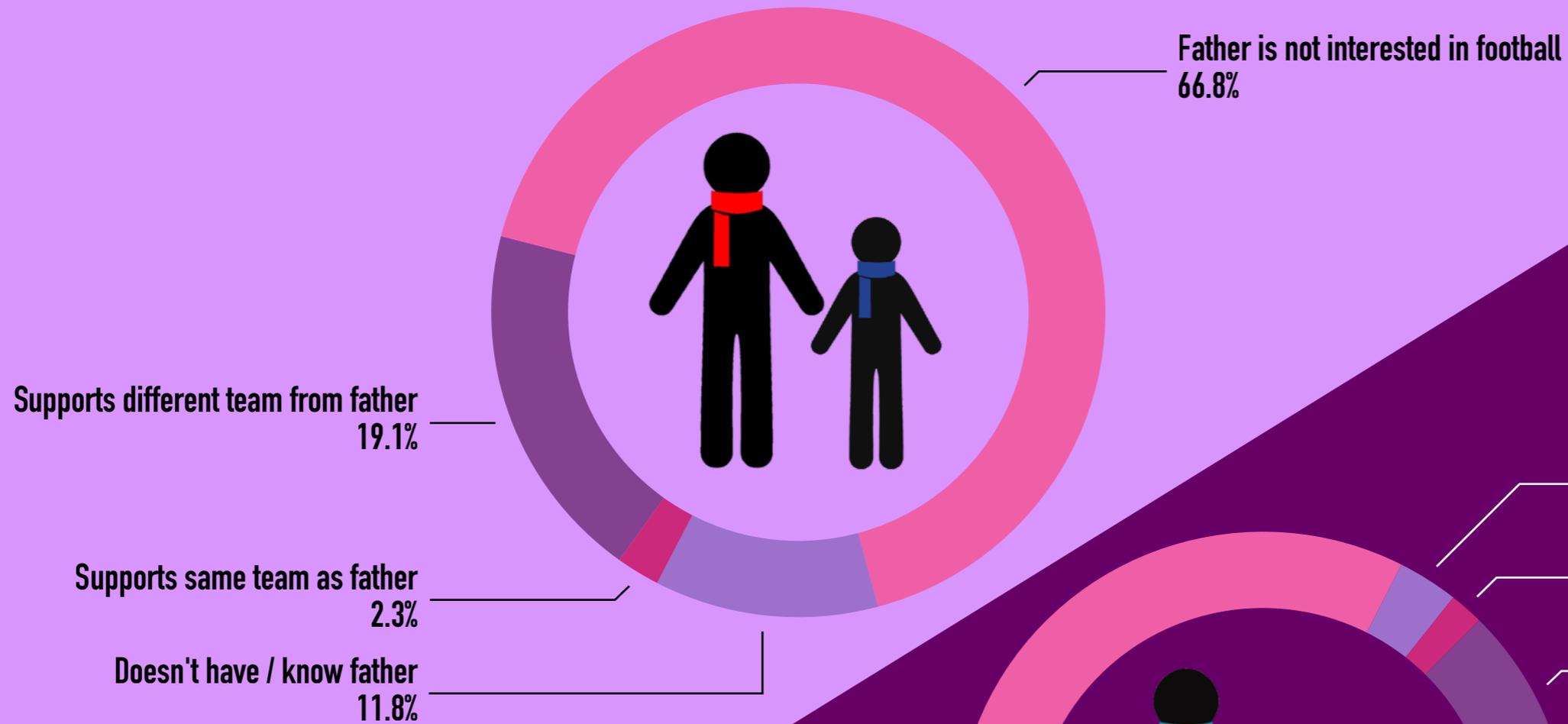


*Respondents could give multiple answers

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

Influence of Parents

Mother



Doesn't have / know mother
3.2%

Supports same team as mother
1.8%

Supports different team from mother
9.4%

Mother is not interested in football
85.6%

Father

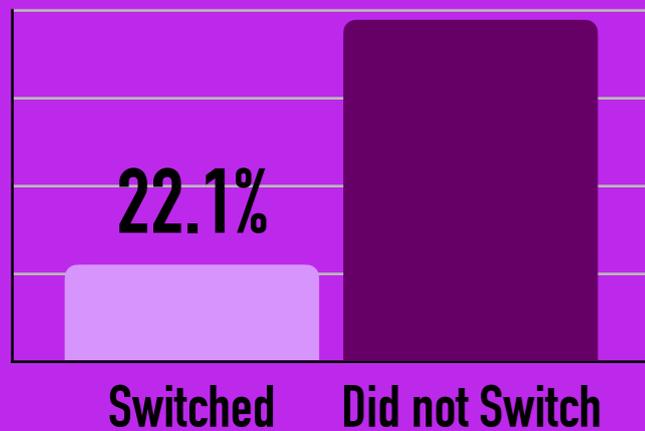
Q: Do you support the same European Football Club as your father/mother?

Switching Club



Supporters who have Switched to another club

77.9%



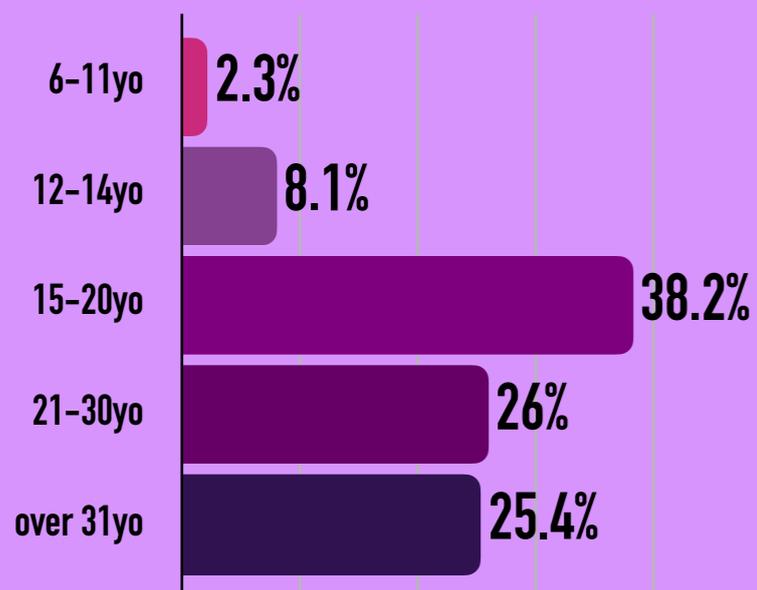
Adopted Club



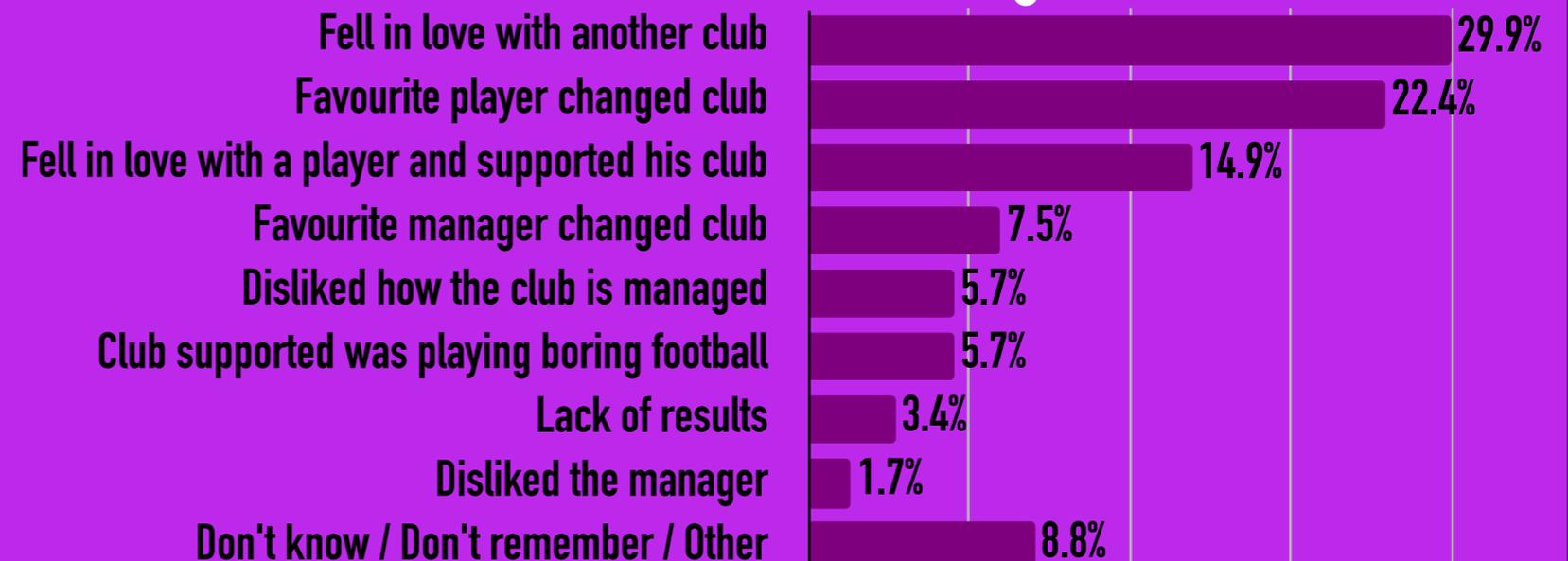
Abandoned Club



Age at which Switch happened



Reason for Switching

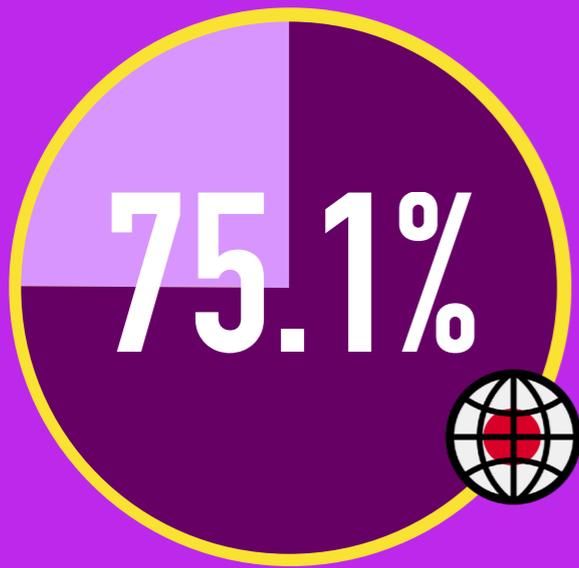


Q: Have you ever changed the European Football Club you support? If yes, why, at what age and which club did you used to support before?

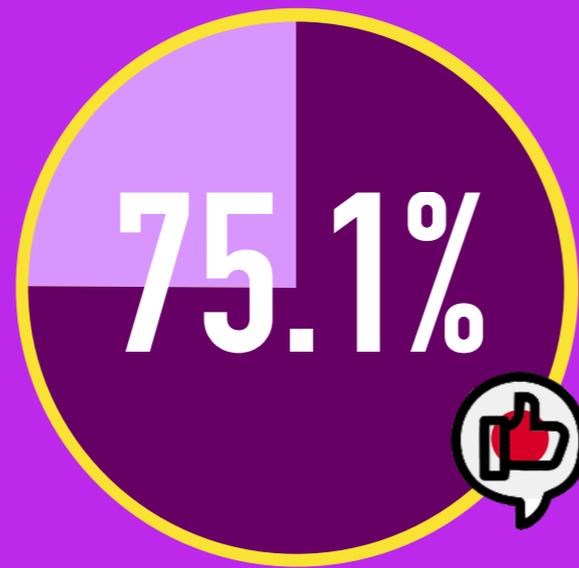
Media



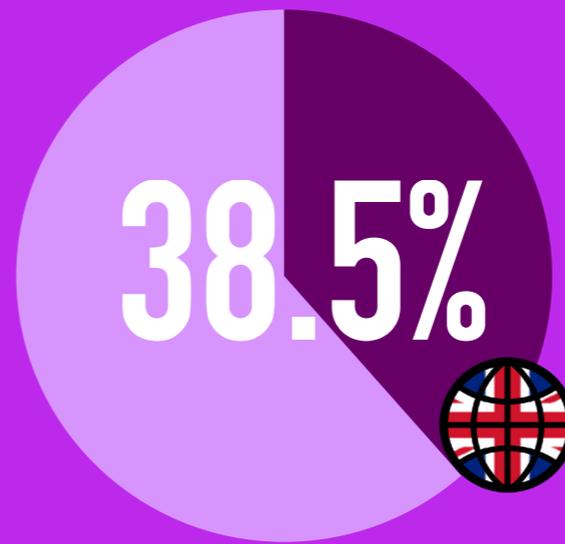
News Sources



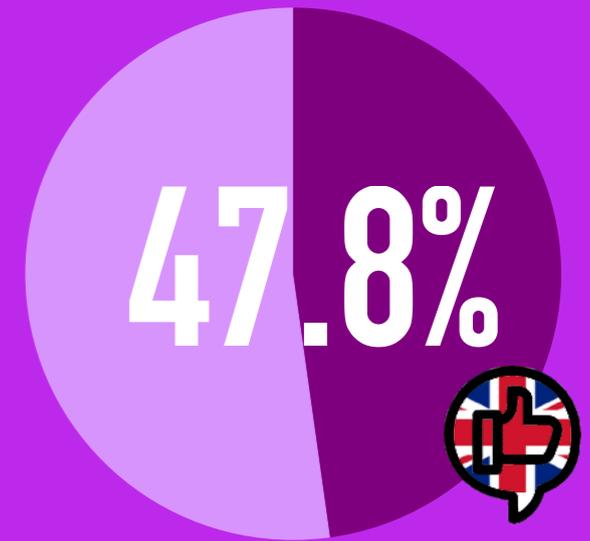
Internet News
(local language)



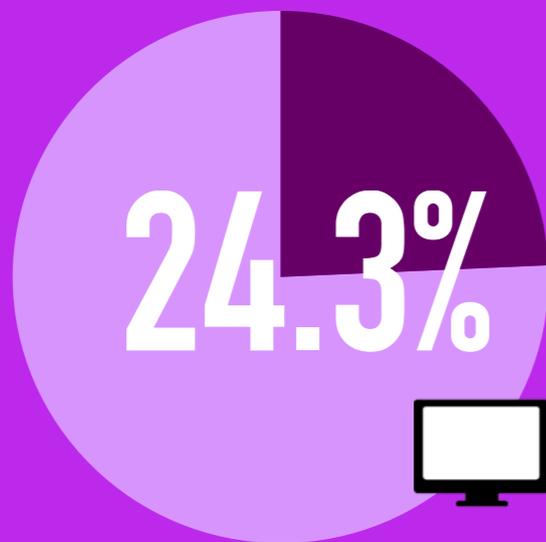
Social Media
(local language)



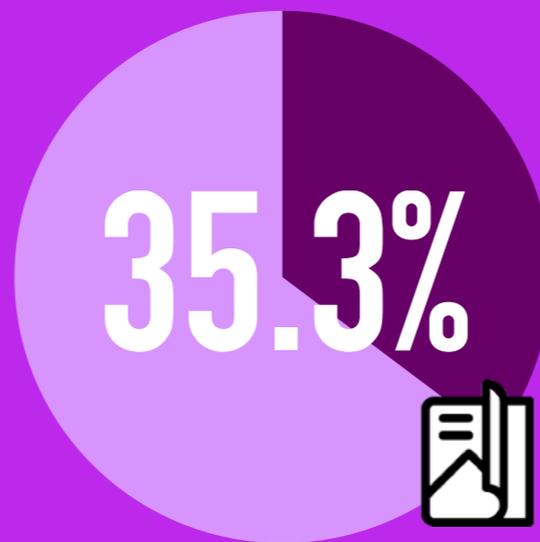
Internet News
(foreign language)



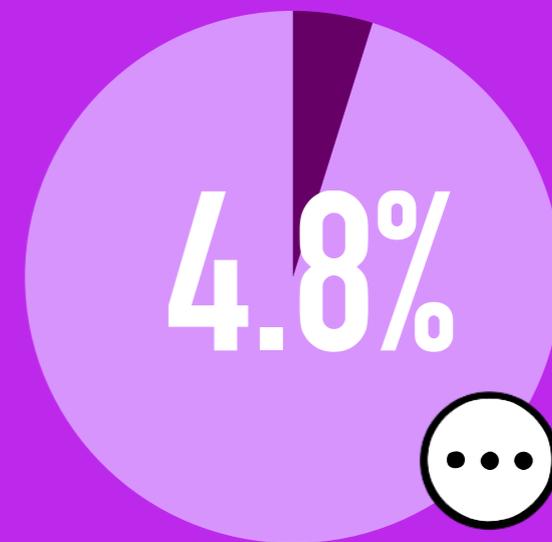
Social Media
(foreign language)



TV



**Newspapers
and Magazines**

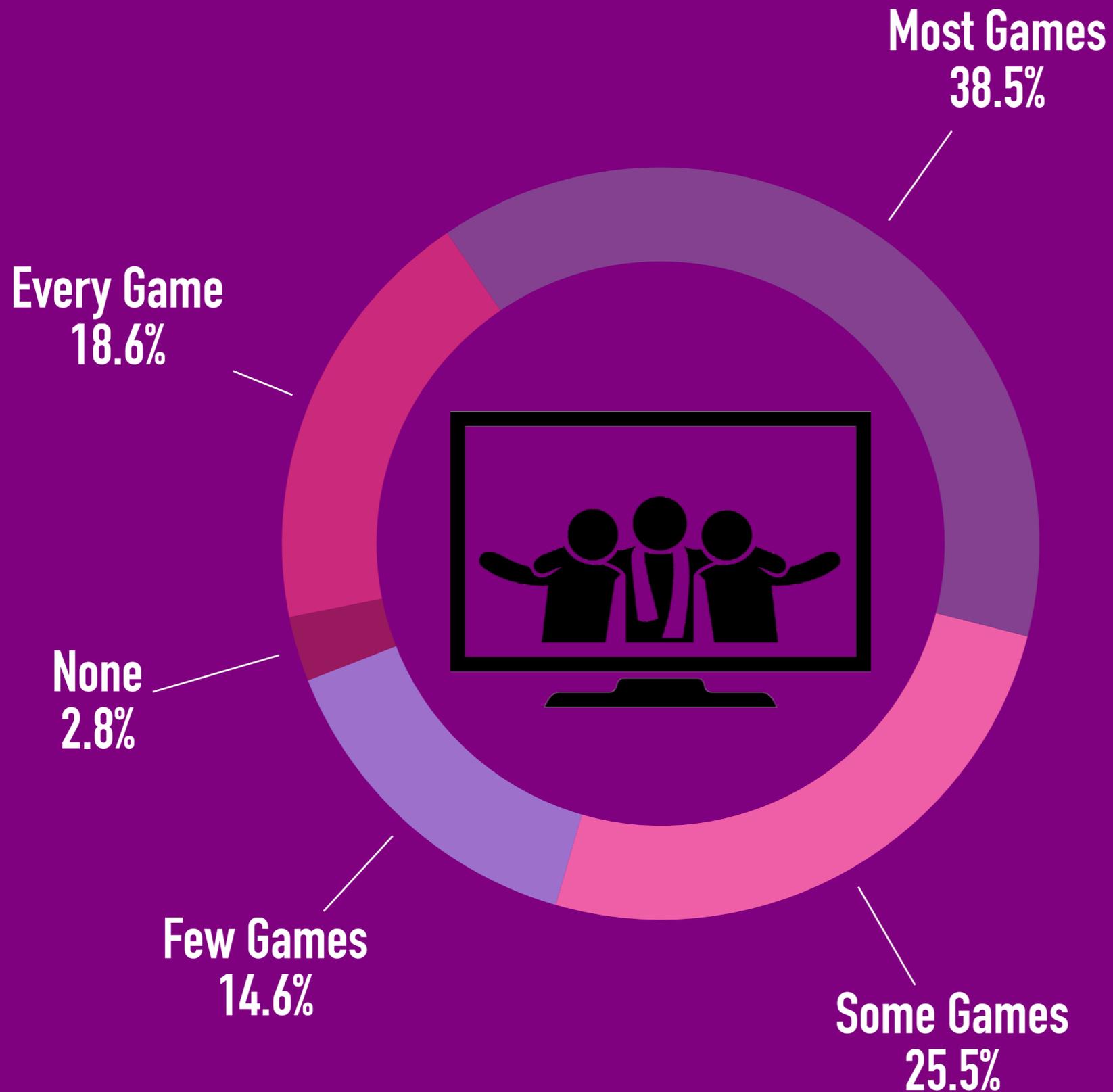


Other

*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?



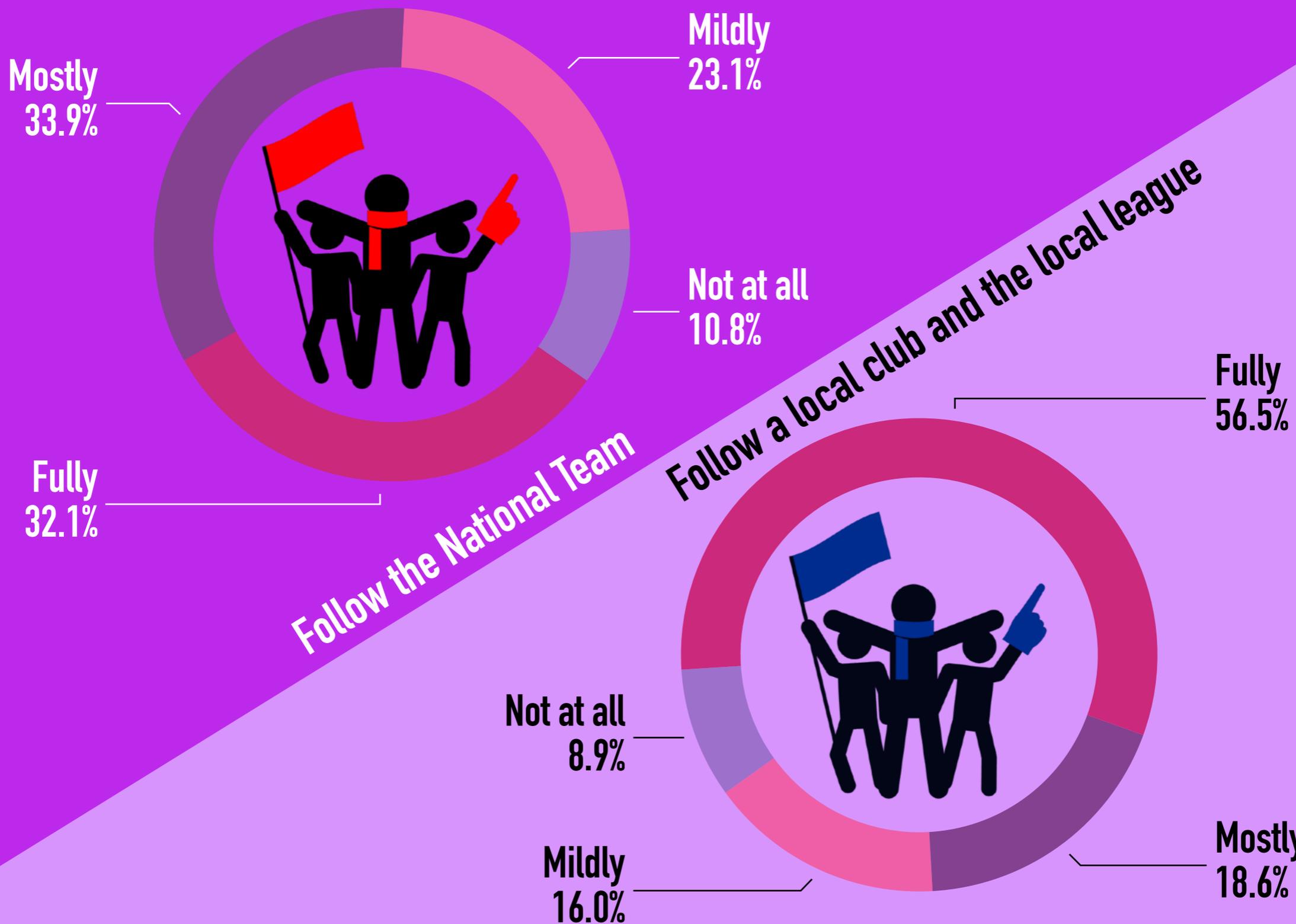
Behaviour

Purchasing Favourite Club's Jersey this Season



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

Following Japanese Football

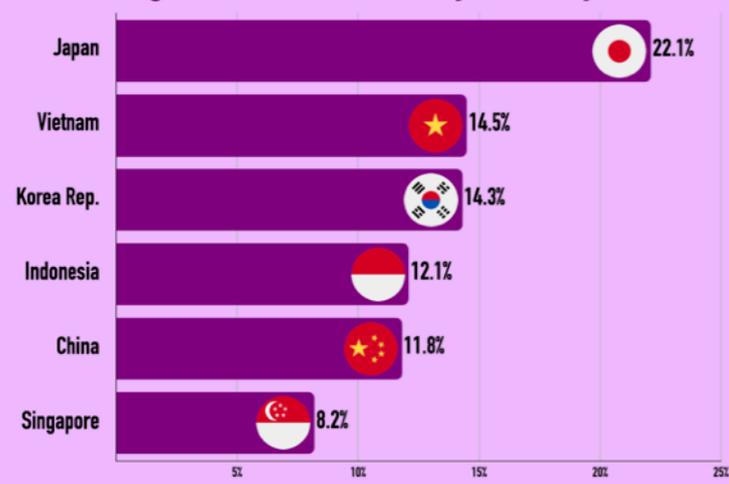


Q: Do you support your country's national teams? Do you support a local team and the local league?

Data Story

“Once a supporter, always a supporter”: the platitude that you support your chosen team for your whole life is still true in most parts of the world, but there are places where it doesn’t ring quite so true. In Japan, for example, our survey shows there’s more room than average for clubs who want to “tempt” people to switch their favourite team. The fidelity rate is lower than average (77.9% vs 86.3%), with various reasons that could encourage people to adopt a new team.

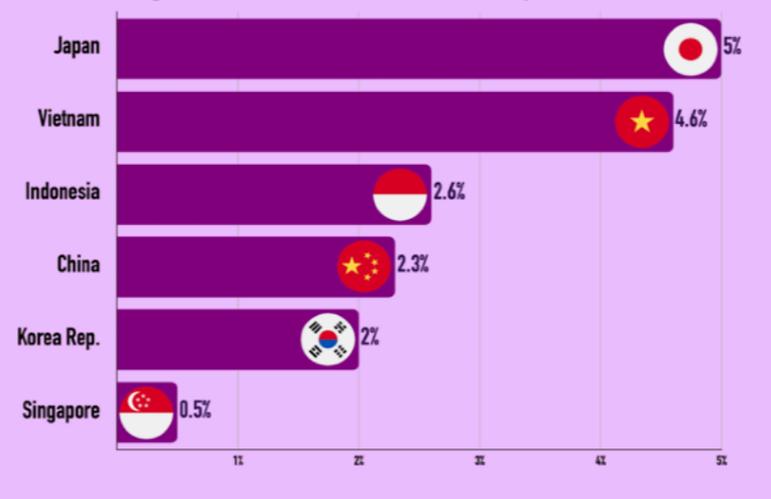
Switching Club in East Asia by Country



Similarly to Korea, Japan surprisingly acts differently compared to the general trend of the survey, with Liverpool (16.6%) the most supported team, followed by Barcelona (10.8%) and Manchester City (7.8%). Manchester United, which used to be the dominant club in Asia, has a relatively small share (7%), despite the two-year sojourn of Japanese midfielder Shinji Kagawa (albeit during an admittedly tumultuous time) and United’s glorious appearance in the 1999 Toyota Cup final in Tokyo.

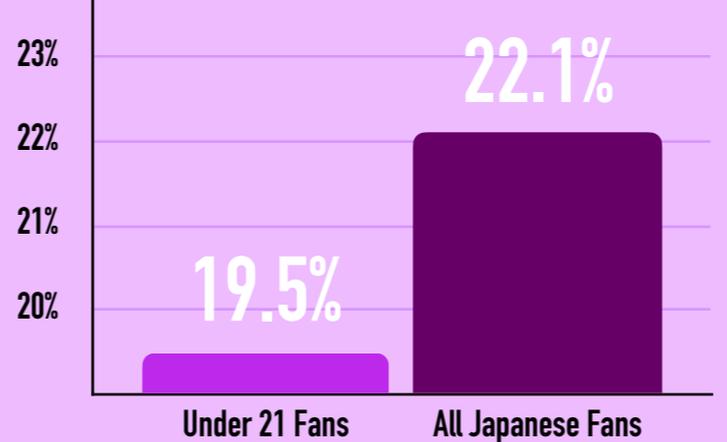
Speaking of Japanese players in Europe, it is reasonable to assume that Takumi Minamino’s arrival at Anfield in January 2020 created more interest and will produce even more in the future if his performances satisfy the expectations of those around him. What can be said for sure is that 25.3% of fans who admitted to switching their favourite club opted for Liverpool: meaning

Switching Club when Favorite Player Transfers



Liverpool increased their Japanese fan base by 5.6%, moving from 11% to 16.6%. On this same theme, 22.4% of all switching fans admit they did so because their favourite player changed club. Given that Minamino’s former club RB Salzburg received very little attention due to its peripheral position on the European football map, his giant leap from the Austrian Bundesliga to the then European Champions has surely served to encourage many fans to watch the team’s games, even when kick-off times come at hugely unsociable hours.

Japanese Supporters who have Switched to another club



Taking into account the fact that Liverpool never played in Japan during the Toyota Cup era – and so were unable to take advantage of the huge media exposure the European champions received every December until 2004 – their popularity is remarkable. Similarly, it’s noteworthy that AC Milan, which travelled to Japan five times in 14 years, has lost more than half of its supporters in recent years, sinking from 6% to their current 3.7%.

Top-5 European Clubs Supported by U21s in Japan



Another interesting issue is raised when looking at the age distribution of the “infidelities”. Compared to the other countries in our survey, the phenomenon is more widespread throughout the various age categories. It is most common in the age range 15–20, but with a lower share (38.2%) compared to other countries. This means the habit of switching clubs is also prevalent amongst adult and mature supporters, with more than half of the fans who changed their team being over 21. This is a rate that no other surveyed country even came close to.

Are the youngest Japanese fans becoming more loyal to their chosen team? It’s too early to say, but, if so, Manchester City looks likely to benefit the most, as it is the most supported club among Under-21 fans, slightly overtaking Liverpool (13% to 12.3%), even without the help of signing a Japanese player.



Appendices



Local Voices

Of the 40 million people living in the Greater Tokyo area, **Manuel Belleri** is one of the few who has played European football at the highest level, with eight seasons under his belt in Serie A, back when Italian football was the most competitive on the planet. Today he is technical director at the AC Milan Academy in Tokyo, and spends his days happily passing on his knowledge to very-eager-to-learn Japanese children.



We asked Manuel to help us understand how a model soccer school in Asia works, and our chat started with an explanation of how AC Milan franchises its brand to Japan. “It is actually very simple,” the former Lazio defender explained. “AC Milan sells the right to use the AC Milan Academy brand to a local investor, offering the opportunity to develop a project related to youth football but also the chance to co-operate with the club on other local activations and possibly sponsorships. AC Milan might also support the academy by sending legends over for events, or by inviting local young players to Italy for a guided tour of the facilities at Milanello, to summer camps or even trials.

“As a technical director, I work directly for AC Milan. There are local coaches who I select and train to work alongside me, but they are hired and paid by our Japanese partner. Under normal

conditions I return to Italy twice a year to keep up with new coaching courses and AC Milan’s vision. Some academies don’t have a resident technical director sent by AC Milan, in which case somebody travels from Italy every 3–4 months to assess the facilities and coaches, and also to pass on new coaching principles and ideas.”

We asked about the other pre-requisites to becoming licensed and opening an academy. “The most challenging factor is to find the right football pitch,” Manuel replied. “Ideally, an academy would be able to use a full size pitch, either with natural or artificial grass, but in some cases we need to make exceptions. In Tokyo, for example, due to the exorbitant value of land, it is basically impossible to find a full size pitch in town, so we have to settle for good quality futsal pitches.”

We then enquired as to the important factors required to make an academy successful – especially considering the fierce competition, with many other European clubs opening football schools in Japan and other countries in Asia. “In Tokyo, since the parents and children are usually very busy, accessibility is paramount,” Manuel explained. “The quality and size of the pitch is of course also a factor, but the main element is perhaps the presence of a European technical director. Not only do we bring our experience, but we also embody the hopes of these young players, who work so hard to one day play in Europe. We are a bit like a gateway to their dreams...”

Finally, we asked Manuel to tell us something about those young footballers. “They are quite amazing,” he replied happily. “They are incredibly dedicated and hard working, and their football skills are just as good as those of the children in Europe. They are also very good learners, their overall attitude is very positive, and so it is a joy to coach them. The only disadvantage they might have when compared to the young players back in Italy is that their physical stature is usually smaller, something that could become an

obstacle when it is time to make the big step into professional football.

“So far, I am very happy with the work we are doing here. Especially now that I can speak and understand Japanese, I really like living in Tokyo. It is a great city, and there is a lot to learn and explore. The food is excellent too, and it is easy to keep in shape. Though one never knows what the future holds, for now I can say that coming here was a good decision, and I am totally satisfied with my experience in Japan with the AC Milan Academy”.



Top 10 Comparison Tables



Most Fans in Japan



1. Liverpool



2. Barcelona



3. Manchester C.



4. Arsenal



5. Manchester U.



6. Juventus



7. Chelsea



8. Real Madrid



9. Inter



10. Milan



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

www.ganassa.jp

Our Clients



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Special Thanks to:

Federico Casotti, Teppei Takano, Dan Orlowitz, Shimada-san, Manuel Belleri, Emanuele Larese, and Kazushi Uehara.

Pictures by:

Dan Orlowitz, Cesare Polenghi, Emanuele Larese, Chelsea FC and AC Milan Academy Tokyo

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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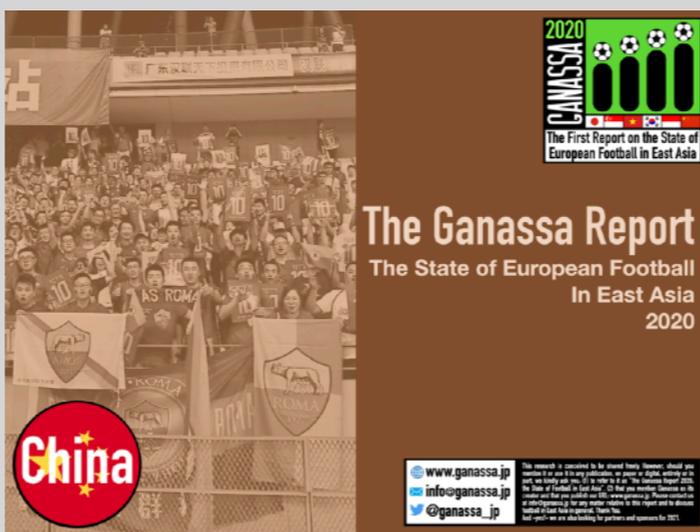
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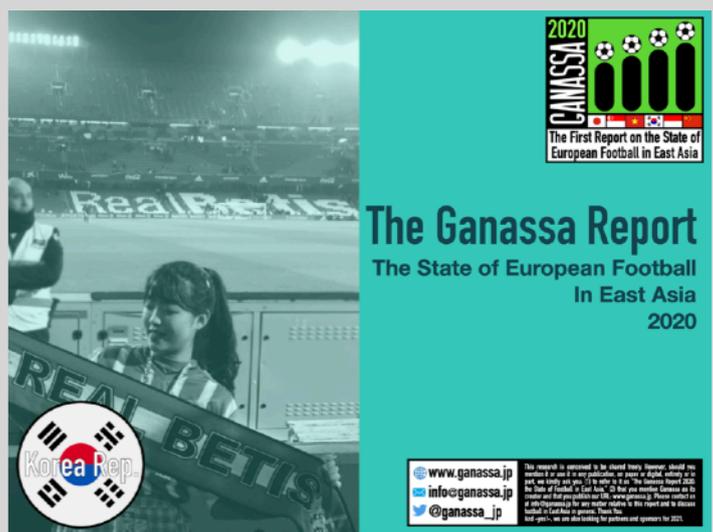
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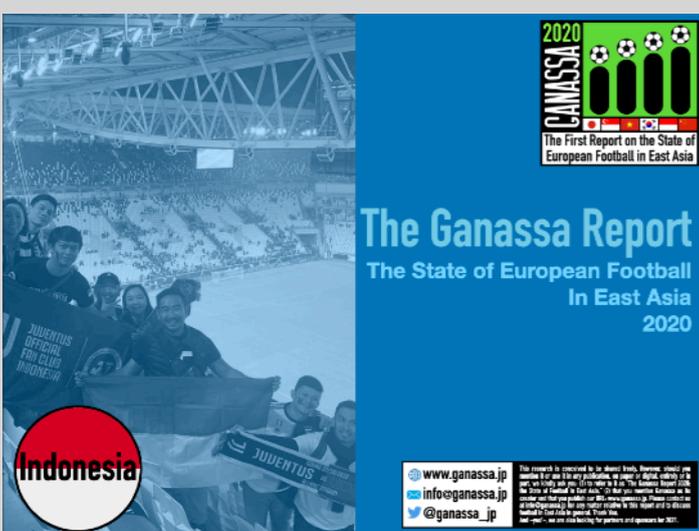
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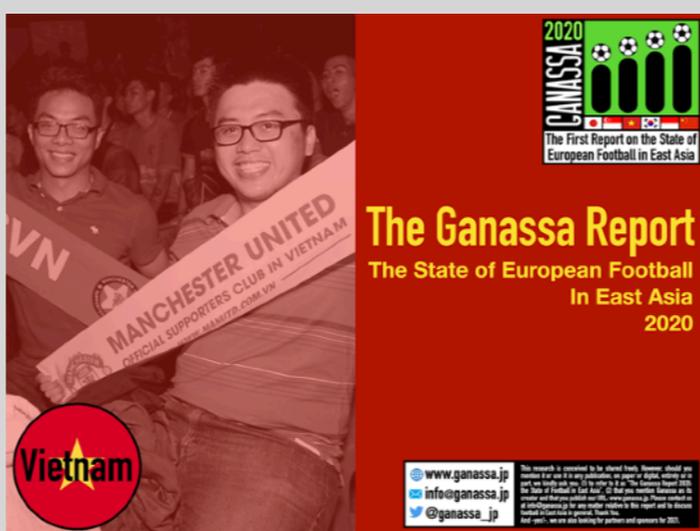
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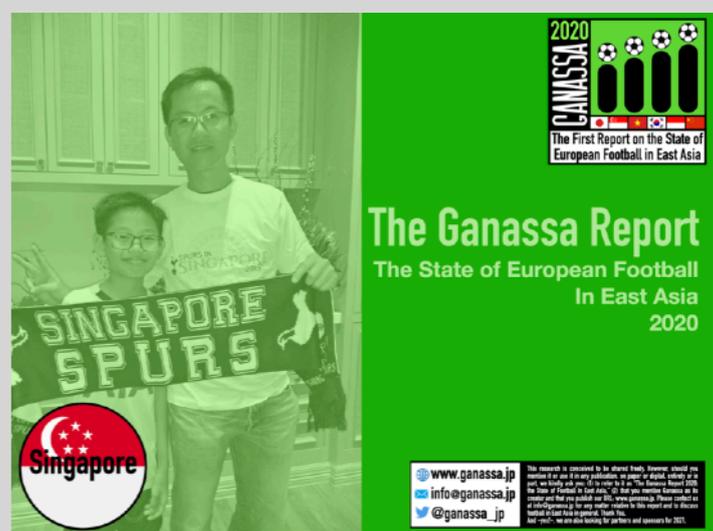
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