

# Global Brand Steering for Football Clubs





# Table of contents

|            |   |    |
|------------|---|----|
| <b>01.</b> | Foreword  | 2  |
| <b>02.</b> | Understanding and steering football clubs as brands               | 3  |
| <b>03.</b> | What makes a strong football club brand?                          | 4  |
| <b>04.</b> | U.S. football market: Perceptions of European top clubs           | 5  |
| <b>05.</b> | Winning the Chinese market  | 9  |
|            | 1. Chinese football market outlook                                | 9  |
|            | 2. Which European league has the highest impact in China?         | 11 |
|            | 3. Using Chinese digital platforms to win over consumers          | 12 |
|            | 4. Successful Branding Activities in China: Examples              | 18 |
| <b>06.</b> | Beyond China: Exploring new markets with the help of digital data | 21 |
| <b>07.</b> | Beginners' guide: Global brand steering                           | 23 |
| <b>08.</b> | Tools   | 24 |
| <b>09.</b> | Contact   | 25 |

# 01. Foreword

## Lars-Alexander Mayer

CEO

TD Reply



Dear Reader,

In our 20 years of working with some of the world's most renowned brands, which are also major sponsors of football clubs, we've had the chance to develop and successfully put into practice novel brand measurement and steering methods. These methods are based on the deep analysis of consumer interest and engagement that is reflected by openly available and ubiquitous user-generated digital data. We came to realize they could – or even should – be employed by the clubs themselves.

Brand strength becomes more increasingly important in all industries, which is especially true when it comes to football. We will see that clubs which have not achieved much athletic success in recent years have been able to maintain extremely committed and passionate fans around the world, due to their brand strength. Similarly, other clubs which are currently extremely successful on the pitch are finding it challenging to acquire new followers globally – a phenomenon which we can track and measure with our unique tools.

Yet for any European first league club, being able to radiate a unique, favorable brand image not only at home, but also abroad is becoming a decisive factor for long-term survival. How to go about it? This white paper, packed with some interesting insights we gained in various projects that prove our case, provides answers. Which markets to target? We have answers for that as well.

We are your partners when it comes to helping you make your brand be a force to be reckoned with in the football markets of the future.

Yours sincerely,  
Lars



**Football club brands are becoming increasingly similar to the commercial brands that sponsor them. Accordingly, clubs should aim to steer their brands globally in much the same way as their sponsors in order to reach their closely intertwined internal and external strategy objectives.**

Today, football clubs competing in top European leagues are also major international brands that attract customers and supporters around the globe. It has been reported that even in North Korea – a country where only a slim minority has access to the internet and free media – top European football clubs and players such as Lionel Messi enjoy mass popularity. This tells a lot about the unparalleled ability of football clubs to radiate their brand across national, political, social and economic borders. In fact, the relationship between the brand and the customer in the football industry is unique. Fans regularly display fierce, life-long loyalty to “their” club even when the quality of the “product” – its games, achievements, players – suffers or declines. In contrast to most other industries, brand switching is rare in football. Likewise, brand history and past glory tends to have a stronger and more persistent effect in football than in other industries. Thus, attracting new consumers is the key to growth.

At the same time, **football clubs are also very much for-profit businesses like any other and their level of success is highly dependent on their financial well-being.** Investment is needed to recruit or train outstanding players who raise the chances of winning national and international championships, which substantially extends the club lifespan as a major brand. In recent years, moreover, the cost of broadcasting rights and transfer fees downright exploded. It is now estimated that the top clubs could soon collectively generate as much as 10 billion Euro over one season from broadcasters. Yet a large share of club revenue comes from fans, both directly and indirectly. Therefore, football club brands are incentivized to continuously compete for the favor of local and global supporters. Internally, they need to motivate outstanding players to remain loyal to the club and the whole squad to deliver an excellent

performance on the pitch. Simply put, football clubs find **themselves under an imperative to grow in order to stay competitive.**

It is therefore no coincidence that more and more former managers of international brands are now at the helm of football clubs, as is Herbert Hainer, current president of FC Bayern Munich and former CEO of Adidas. This is a clear sign that FC Bayern Munich is among those who have realized early that **football clubs today must be led like global brands.** Steering football clubs as global brands means tapping into growing football markets such as China, the United States and others.

This white paper will showcase how football clubs can profit from a global brand steering approach that has been successfully applied by leading consumer brands. Through data-driven insights, it will also investigate global consumer perceptions, interest, and other market specifics in greater detail. A quick understanding of emerging football markets through real-time data is the very basis of this brand steering approach, allowing football clubs to get **started growing their global footprint fast.**



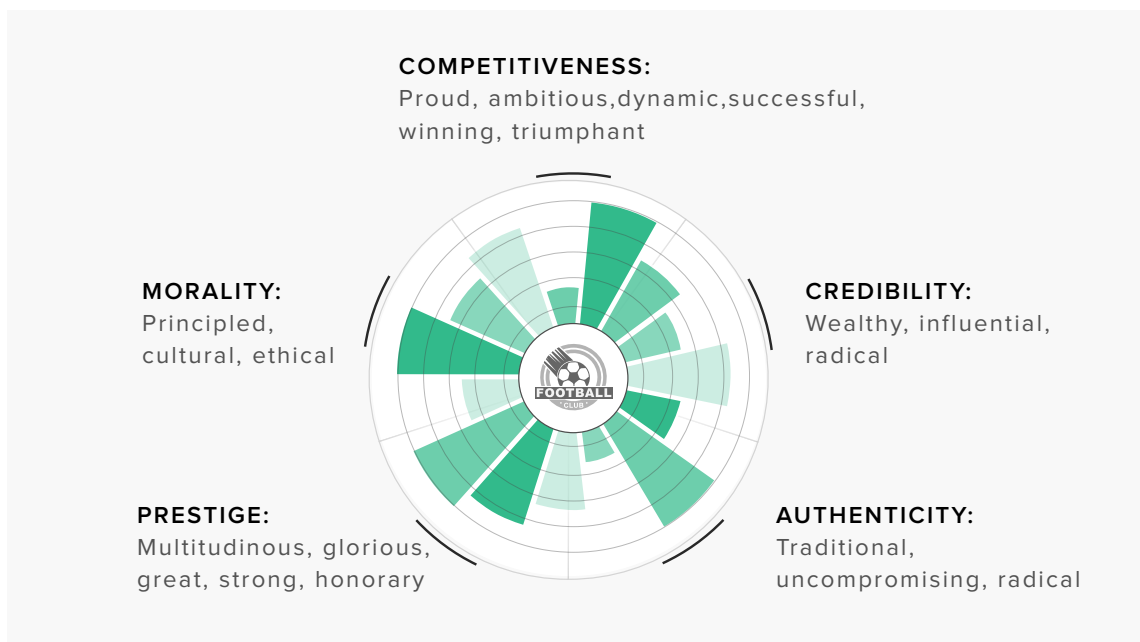
# 03.

## What makes a strong football club brand?

Any football club brand can be accurately measured, tracked and compared with other brands by using openly available digital data.

Before brand steering comes brand measurement. The equity of a football brand can be objectively measured on the basis of two parameters: first, the **global awareness and engagement** it can muster, and second, its **brand image as perceived by customers global** around the globe. Brand image refers to the unique set of associations or values a brand evokes in customers. Accordingly, a strong football club brand **generates high awareness and engagement and is associated with differentiated and favorable brand values** relative to the competition.

Both parameters can be evaluated by utilizing **search and buzz data**, which is openly available and increasingly ubiquitous, as it is generated in a growing amount of touchpoints and in particular for a high-involvement product like football. Search data analytics offers a convenient way of quantifying a brand's global awareness, while buzz analytics allows for the measurement of its global engagement and image. The results can be visualized with the help of a brand wheel, showing how important and how well-perceived the unique brand values are from the perspective of the consumers.



Example football club brand wheel

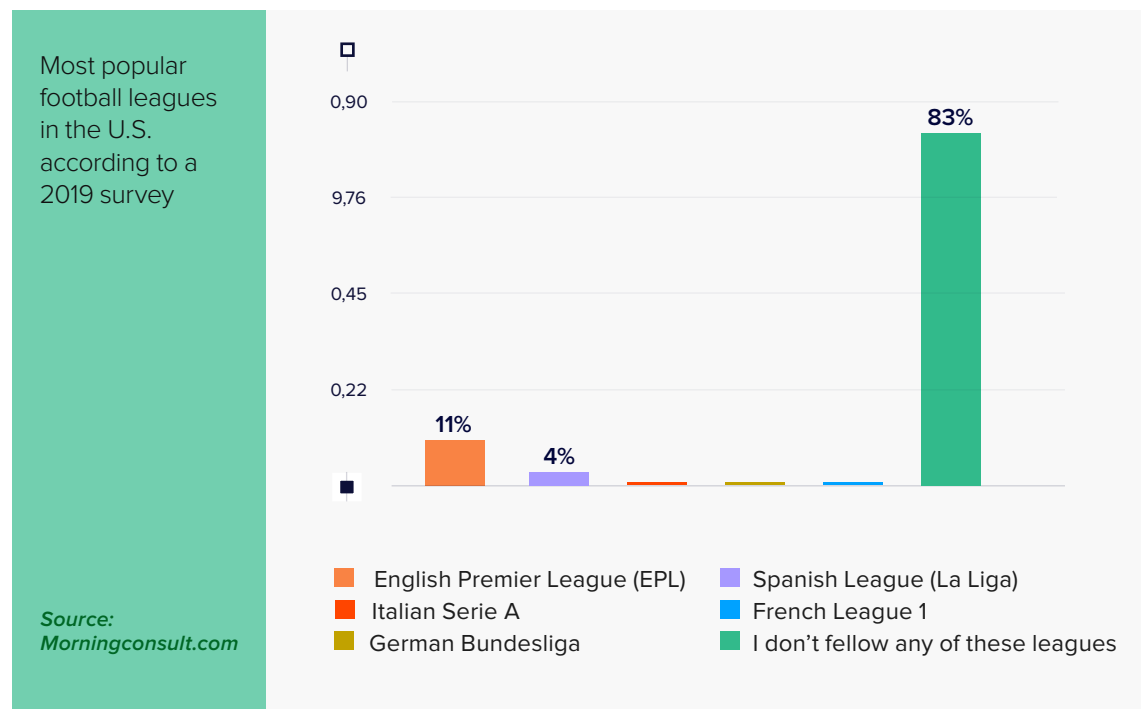
This is the essence of the **Digital Brand Equity (DBE)** approach by TD Reply, which allows for both brand measurement and tracking. It combines branding theory and data science to accurately derive image drivers and brand sentiment from ubiquitous user-generated content on the internet. **By making use of openly available digital data, DBE provides immediate, actionable, and continuous measurements with minimal effort on the brand side, reducing costs in the long run. This approach is successfully used by numerous international top brands across different industries and in multiple markets, enabling them to steer their brand globally by consistently linking strategic brand positioning with marketing activities.**

# 04.

## U.S. football market: Perceptions of European top clubs

Brand image perceptions at home and abroad can significantly differ. Measuring them is crucial to understand why a certain brand performs better than the other in a target market and to identify new opportunities for growth.

European football or “soccer” draws comparatively little interest from American consumers. This is particularly due to the competition from traditional U.S. sports such as American football, baseball, and basketball, which are all far more embedded within U.S. culture. For instance, 83 percent of Americans do not follow any of the European football leagues. Still, the U.S. market remains lucrative owing to the relatively high purchasing power of American consumers. David Beckham's transfer to L.A. Galaxy in 2007 was the first prominent move that increased the awareness towards the U.S. market. Many others followed to enjoy lucrative contracts, like Schweinsteiger (2017, Chicago) or Ibrahimovic (2018, LA). While clubs still have many opportunities to strengthen their foothold by conquering unexplored global markets, success in the U.S. market is particularly dependent on **shaping an interesting and unique brand image**. The data-driven DBE approach is ideal for measuring and understanding this impact.



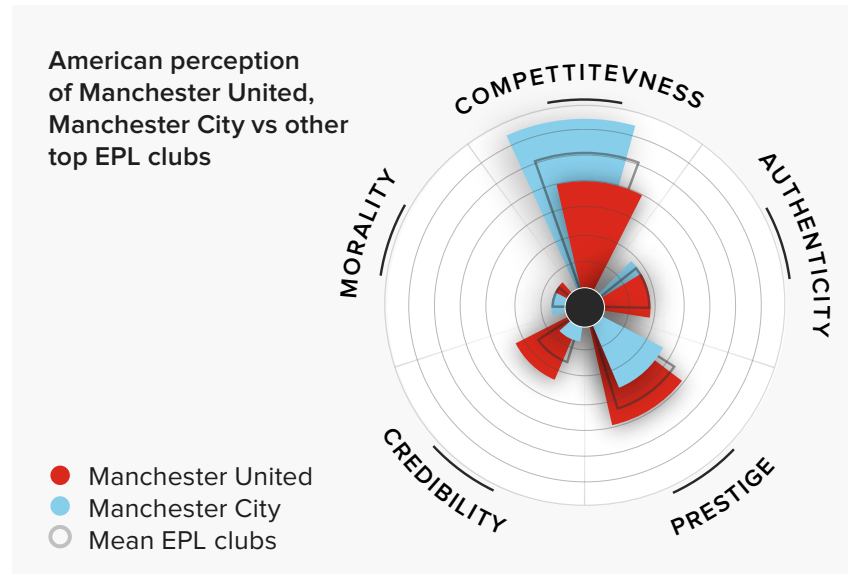
The fact the English Premier League draws the highest interest by a vast margin can be partly explained by the strong U.S.-British ties and a shared language. Even more so, however, it appears to be driven by interest in **Manchester United** in particular, which is **followed by 32 percent of the respondents**. Liverpool, the closest contender, is only followed by 14 percent, Manchester City

comes third with 9 percent. The American preference for ManU cannot be explained by performance alone, as the club failed to garner any major national and international achievements in recent years. By **taking more brand drivers into consideration through the DBE approach**, however, the picture becomes more clear.

# 04.

## U.S. football market: Perceptions of European top clubs

Source: DBE analysis by TD Reply, U.S. online buzz 2018-2019, online buzz data by Brandwatch.



A comparison of the American perceptions of ManU's brand drivers with its traditional rival, Manchester City, demonstrates how differently both Manchester clubs are perceived in the U.S. and which particular associations drive their respective brand images. **ManU's strongest drivers are credibility (wealth, influence, and reputation) and prestige (admiration, class, greatness), while Man City's brand image is mostly driven by competitiveness (today's performance on the pitch).** Typically, competitiveness is the strongest brand driver for leading sports clubs and franchises, yet ManU's prestige is almost equally as strong as its competitiveness. In conjunction with the exceptionally strong credibility driver, this reveals a highly differentiated and favorable brand image depot that remains **relatively unaffected by the relatively poor performance on the pitch in recent seasons.** Man City's brand image, in comparison, does not possess this depot and therefore is far more dependent on Pep Guardiola's next masterplan and the team's ability to bring it to the pitch week for week, putting the club in a less comfortable seat for overall brand positioning in the U.S. market.

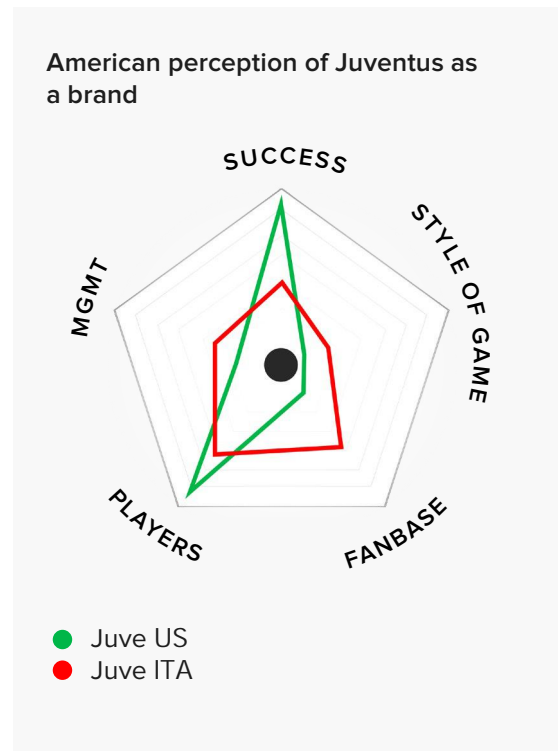
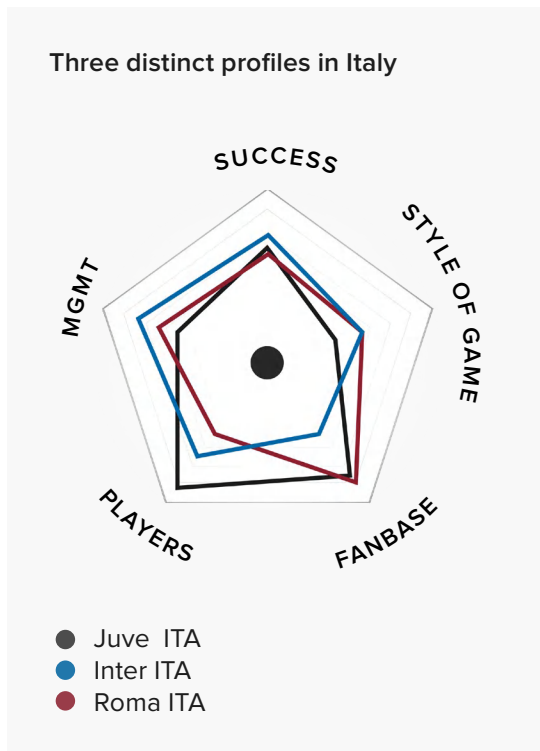
**The question arises, how can clubs leverage their brand position and nurture an image beyond highly volatile sportive success? How can they establish a brand that can win over the small football-interested U.S. audience, particularly as a club outside of the Premier League?**

The first but very crucial step is to distinguish between how a brand is grown, embedded and perceived in the local market and competitive landscape and to learn about the limitations to apply this to a new socio-cultural and sports-market context (like the U.S.). To export top European football brands overseas means to succeed without a club's strong inherited history, tradition and identification on supporter level. Therefore, **gauging the difference in the club's perception at home and in the target market is crucial to identify new growth opportunities.**

That club perceptions and their drivers at home and in markets abroad can vary considerably becomes particularly obvious when comparing the perception of top Italian clubs at home and abroad. Images of Juventus Turin, AS Roma and Inter Milan in Italy largely vary with regard to the main drivers of their distinct images: whereas AS Roma is mainly driven by the fans, Inter Milan raises a lot of attention and discussion with regard to the MGMT (Inter Milan's Chinese majority stakeholder). This brand driver profile, however, changes radically when turning towards a new market like the U.S. The American perception of Juventus Turin, for instance, is mostly driven by its players and its success on the pitch, whereas in Italy, there is a more complex picture, with other drivers playing a more important role.

## 04.

# U.S. football market: Perceptions of European top clubs



Source: DBE analysis by TD Reply, U.S. online buzz 2018-2019, online buzz data by Brandwatch.

In Italy we find a complex mixture of tradition, fans, atmosphere. One star transfer will not induce a severe shift in the club's image. Looking into the U.S., the picture changes: Next to sportive success that can hardly be planned for, the **primary asset are the key players that are driving the buzz**. This does not come as a surprise given Cristiano Ronaldo, who is also the most followed person on Instagram, is the player generating the highest buzz (total number of mentions on digital platforms) among American consumers, alongside Barcelona's Lionel Messi.



## 04.

## U.S. football market: Perceptions of European top clubs

Iconic players generating high buzz serve as amplifier for the brand image abroad, even when their role on the pitch itself may be limited.

| Number of mentions per million € spent |                |
|--|----------------|
| Icon                                   | Mentions/value |
| Franck Ribery                          | 564,7          |
| Lionel Messi                           | 258,9          |
| Cristiano Ronaldo                      | 243,1          |
| Pierre-Emerick Aubameyang              | 190,5          |
| Paul Pogba                             | 150,0          |
| Pep Guardiola                          | 119,9          |
| Mohamed Salah                          | 80,2           |
| Eden Hazard                            | 73,0           |
| Neymar Jr                              | 60,2           |

Source: Online buzz data by Brandwatch, U.S. online buzz 2018-2019, player values from Transfermarkt.de.

Calculating the number of mentions generated per million euros spent on a player (market value) is a neat way to figure out who the most valuable players are in terms of generating buzz. Here, we get a surprising picture: Current ACF Fiorentina player Franck Ribéry, who is placed 9th in the ranking of most high-buzz players, turns out to be driving by far the most buzz per buck. This suggests that even players whose role on the pitch may be limited are approaching a retirement age **may still be the most valuable for shaping the brand image**. It might therefore be worthwhile for their clubs to prevent their retirement and keep employing **them further to reap brand benefits**. With the help of the DBE approach, moreover, potentially positive halo effects to the brand image can be identified in the case of a transfer of an iconic player to a U.S. club.

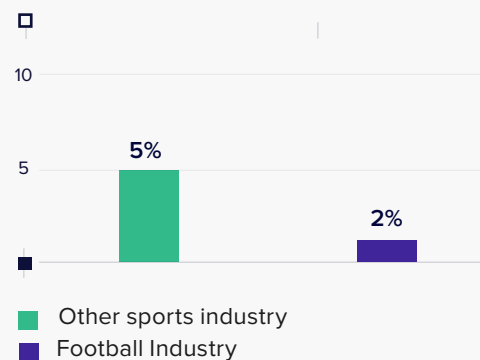
## 1. Chinese football market outlook

China's football industry offers European clubs the biggest opportunities for growth today, and its potential is likely to grow significantly over the next five years. European clubs need to focus on building awareness among Chinese consumers to become competitive brands in China.

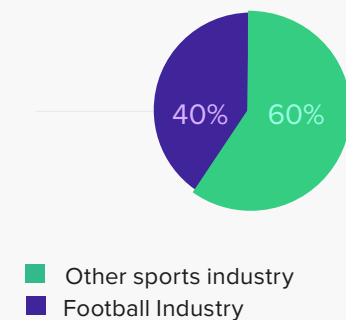
A 2014 China State Council report urged continued growth of China's sports industry and set the target of the industry achieving a total value of 5 trillion RMB (more than 600 billion Euro) by 2025. On a global average, football has a share of 40% of a country's sports industry value. Accordingly, **China's football industry could be worth 2 trillion RMB (around 250 billion Euro) by 2025.** The steadily growing number of football academies in China shows that the Chinese government is serious about that goal and the number of Chinese **citizens interested in football could increase significantly over the next few years.**

Target scope of China Football Industry in 2025

Unit: Trillion RMB



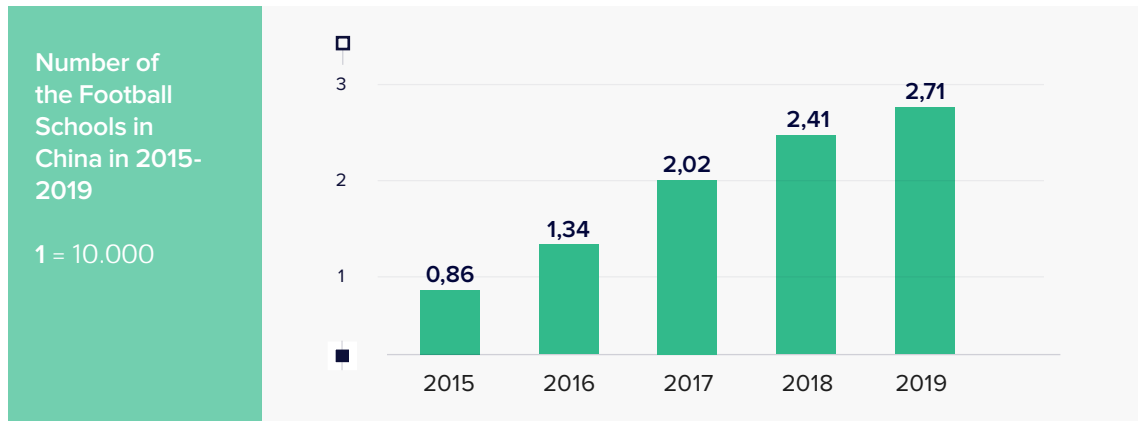
International Football Industry Proportion in Whole Sports Industry



Source: iiMedia report, 2018-2019 Overview of China's Football Industry Development

## 05.

# 1. Chinese football market outlook



Source: iiMedia report, 2018-2019 Overview of China's Football Industry Development

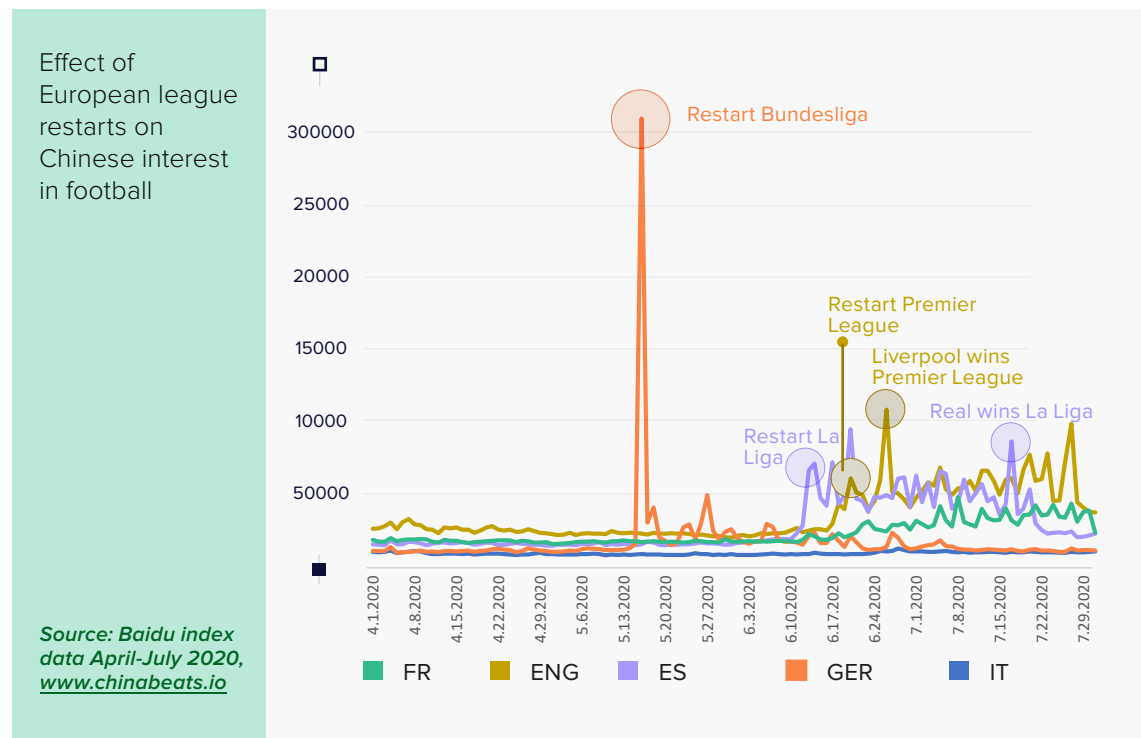
It is important to remember that the Chinese market **requires a different approach than the U.S.** one, as it is still an unexplored territory in many respects, governed by cultural beliefs and attitudes that are generally poorly understood by Europeans. Likewise, most Chinese consumers **only have a rudimentary knowledge of European football leagues and clubs.** For European football brands, this means that there are many untapped opportunities in the Chinese football market and the key to make use of them is **building brand awareness.** The examples shown in this chapter point towards the fact that the brands which are the most active in China's football market by creating football academies, experience centers and through other initiatives are also the ones that **Chinese consumers talk about the most.**

## 05.

## 2. Which European league has the highest impact in China?

Major events and games in most European top leagues lead to a significant increase in the Chinese football interest.

Due to the COVID-19 pandemic, the national football leagues in almost all of Europe went on a hiatus in early 2020, only to restart in May and June. The restarts **present an ideal opportunity to study the impact of European brands on the Chinese consumer interest in football-related topics**. Comparing the effects of the different league restarts also allows us to **identify the top European leagues with the most impact on Chinese consumers**.



China Beats, a new consumer intelligence platform by TD Reply, **allows to track the interest of Chinese consumers in football in real-time by processing and filtering Baidu search data for football-related topics**.

The German Bundesliga restart led to the highest increase in searches, possibly because it was first top league to restart. Although the Bundesliga managed increase the Chinese interest in football by +3000% during the restart, the importance of the Bundesliga decreased once the other European top leagues kicked off. This suggests that the Bundesliga peak was due to the situational component, rather than a result

of its brand and product strength. Overall, the **Chinese are most interested in the English Premier League, followed by the Spanish La Liga and the Italian Serie A**. With respect to the Premier League and La Liga, significant peaks of interest can be noticed that correlate with league finals. Among the European top leagues, the French Ligue 1 generates the lowest overall interest in China. This can be explained by the fact that the Ligue 1 granted Paris St. Germain the champion title in April, thereby ending the season instead of restarting later.



## 05.

### 3. Using Chinese digital platforms to win over consumers

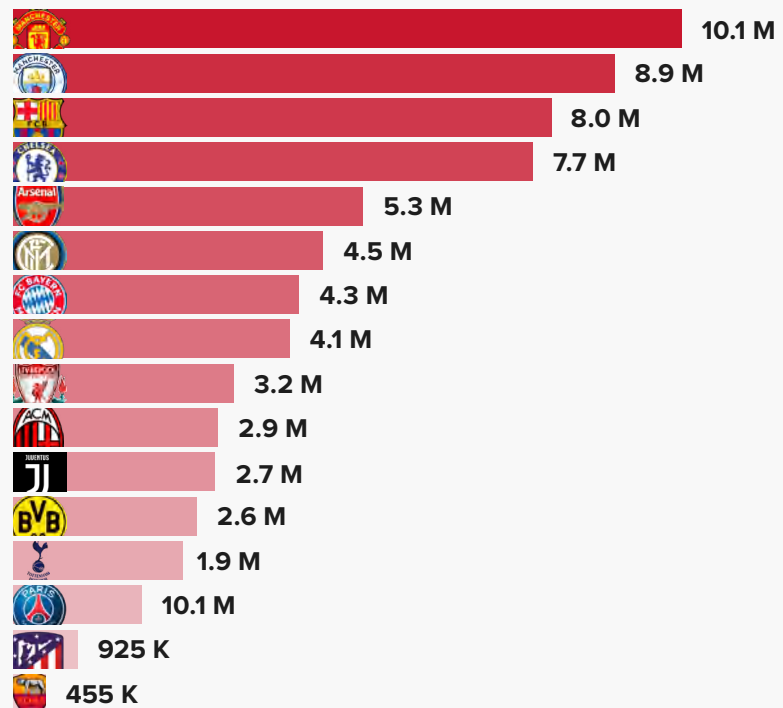
European clubs looking to strengthen their foothold in China should build a good presence on must-have platforms such as TikTok, WeChat and Weibo, but also keep track of China's dynamic social media landscape in full to identify new positioning opportunities and set themselves apart from the competition.

The vast majority of Chinese internet users prefers using Chinese social media platforms, of which there is a very high variety and many of which are little known in the West. TikTok, WeChat, and Weibo however, **can be identified as “must-have” platforms** for football clubs due to their popularity and usage on the part of the European frontrunners.

The **FC Barcelona** has built a strong presence on all these must-have platforms, proving to be **exceptionally apt at leveraging the opportunities** they provide with content that resonates well with the Chinese consumers. Some examples of Barca's activities are shown in the next section. Manchester United also proves to be highly successful in engaging Chinese consumers, having the largest Weibo following of all European top clubs. This is remarkable, given that the last seasons ended rather unsuccessfully for ManU, both on the national and the international stages.

#### WEIBO:

Number of followers

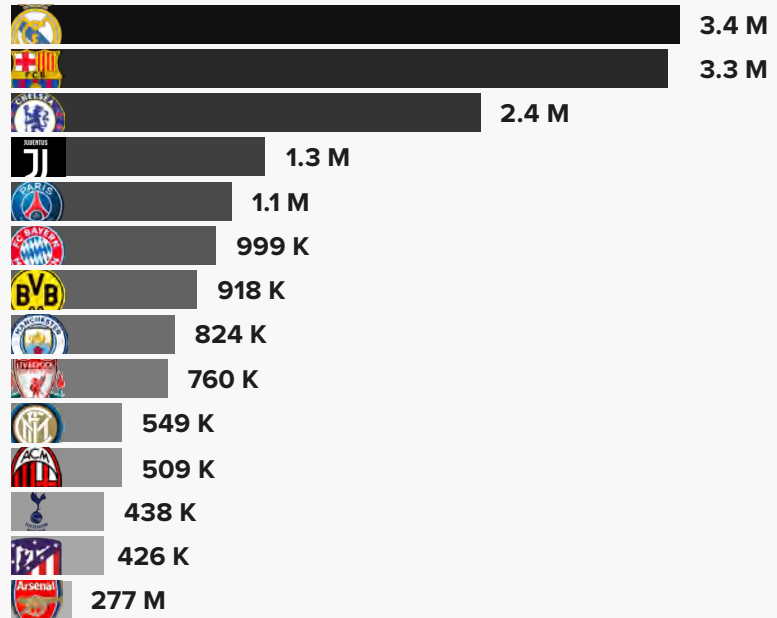


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## 3. Using Chinese digital platforms to win over consumers

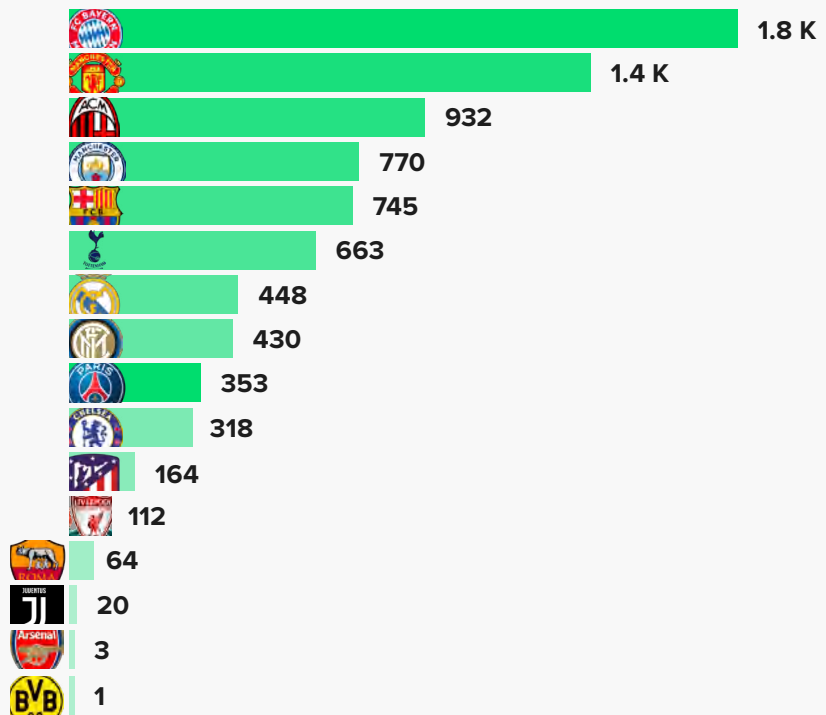
### TIKTOK:

Number of followers



### WECHAT:

Number of Posts






Source: China Beats, August 2020 data, [www.chinabeats.io](http://www.chinabeats.io)

## 3. Using Chinese digital platforms to win over consumers






In addition to building up their presence on the must-have platforms, clubs would be well-advised to broaden their understanding of the vast Chinese social media landscape to identify new opportunities. For instance, the developers behind Weibo have recently launched a new social media app named Oasis, which is somewhat similar to Instagram and centered around topics of celebrities, fashion, food, and travel. Since European clubs have all the potential to provide leading content on these topics, they should potentially take a closer look at this new platform. Many top clubs also still do not have official accounts on popular eCommerce platforms such as JD.com or Tmall. Participating on these **platforms, however, offers an excellent chance to gain new followers through digital fan shops and by participating in shopping holidays such as Double 11 (Single's Day) and 618.**

### Chinese digital platform landscape for football clubs

● worth considering      ● high potential      ● must have




| Platform   | Category    | Description   | Audience  | Best uses   | Used by*                           |
|--|-------------|---|---|---|------------------------------------|
| <br><b>Bilibili</b><br>哔哩哔哩 | Long video  | Bilibili, also nicknamed B Site, is a video-sharing website allowing users can submit, view and add overlaid commentary on videos. It features a scrolling closed caption commenting system for an real-time interactive playback experience. Bilibili also provides a live streaming service where the audience can interact with streamers. | ≈170 million daily users<br>78% < 35 years old<br>52% male<br>48% female        | Bilibili can be greatly used to narrow the club-fans distance through behind-the-scenes and training videos, interviews, and videos sharing advanced football knowledge. Clubs can also foster the creation of user-generated, club-related creative videos through special activities and prize draws.   | AC Milan, Manchester City, Chelsea |
| <br><b>JD.COM</b><br>京东     | E-commerce  | JD.com is a self-operated e-commerce company. Compared with similar e-commerce sites, JD.com has a richer variety of products, and has won market share by virtue of more competitive prices and gradually improved logistics and distribution systems.   | ≈380 million active daily users<br>70% < 30 years old<br>63% male<br>37% female | Clubs can open a fan merchandise shop on JD.com, which is marketplace that has gained a good reputation for carefully checking its sellers to not sell any fake electronics and fashion. Most leading fashion brands have already established such shops. With 618 (June 18), the marketplace also established its own shopping holiday, which raked in almost 40 billion of dollars this year. | None                               |
| <br><b>Kwai</b><br>快手       | Short video | Kuaishou (Kwai) is a Chinese video sharing mobile app developed with a particularly strong user base among users outside of China's Tier 1 cities. Its main competitor is Douyin, which is known as TikTok outside of China.  | ≈200 million active daily users<br>70% < 30 years old<br>54% male<br>46% female | Kwai is known for rather "thrashy" content and is popular among the relatively poor tier 2-3 city and rural Chinese population. It strives, however, to become more attractive even for more upscale brands. The platform now also cooperates with JD.com to allow users to buy products directly through Kwai, making it a platform clubs should keep track of.                                | None                               |

## 3. Using Chinese digital platforms to win over consumers

| Platform   | Category        | Description  | Audience   | Best uses  | Used by*  |
|--|-----------------|--|--|--|---|
| <br><b>Oasis</b><br>绿洲    | Social commerce | Oasis, a new social commerce platform by Weibo, users can share snapshots of their life through photos and videos. The principle is similar to Instagram, yet as in Weibo, users can only participate through invites by other users. Oasis also features a highly addictive reward system that is similar to online role-playing games. | 70% < 29 years old<br>20-29 years old account for about 50% of the user base<br>55% male<br>45% female                   | The Oasis audience substantially differs from the Instagram audience by being majority male and even younger, making it generally interesting for football clubs. It struggles, however, with growing its audience at this moment. Yet this could change in the near future, and clubs could profit from having built a profile early at that point. | AC Milan, AS Roma, Atlético Madrid, Liverpool, PSG                        |
| <br><b>RED</b><br>小红书     | Social commerce | RED is known as Xiaohongshu ("Little Red Book") in China and focuses on user-generated product reviews, travel and lifestyle blogs. The user base is exceedingly female.   | ≈300 million registered users<br>70% of the user base belongs to Generation Z<br>80% female<br>20% male                  | On RED, football clubs have the chance to win over an overwhelmingly female audience, which could be strategically interesting for some clubs. Good options include using influencers to create videos promoting branded fashion, videos providing health tips, and involving prominent footballer wives to blog about their lifestyle.              | Manchester City   |
| <br><b>TikTok</b><br>抖音 | Short video     | TikTok (called Douyin in China) Video-sharing platform used primarily for sharing short music, lip-sync, dance, comedy and talent videos with a length of 3 to 15 seconds, and looping videos of 3 to 60 seconds. Renowned recommendation algorithm suggesting videos that accurately reflect a user's interests.                        | ≈800 million active daily users<br>60% have at least a Bachelor's degree<br>90% < 35 years old<br>40% male<br>60% female | Particularly effective for publishing humorous content, publishing game and training snapshots, event highlights and short interviews.   | All clubs excluding AS Roma   |
| <br><b>Tmall</b><br>天猫  | E-commerce      | Tmall by the Alibaba Group is the leading B2C (Business-to-Consumer, commercial retail) shopping platform in China. It integrates thousands of brands and manufacturers to provide a one-stop solution for businesses and consumers.   | ≈500 million daily users<br>59% female<br>41% male   | Tmall resembles a digital "mall" more closely than its competitors, with featured brands having their own virtual shops with a customizable appearance. With Double 11 (Singles' Day), Tmall also is the originator of China's most important shopping holiday.  | AC Milan, Bayern Munich, Inter Milan, Manchester City, Real Madrid        |
| <br><b>Youku</b><br>优酷  | Long video      | Youku is a subsidiary of the Alibaba Group and one of China's leading video streaming websites, bearing similarity to YouTube. Youku is less focused on user-generated content than YouTube is and more focused on commercial content, allowing users for setting up an online shop in their account.                                    | ≈500 million daily users<br>75% < 35 years old<br>54% male<br>46% female   | Compared with YouTube, Youku offers much more opportunities to offer exclusive video content through its VIP membership system. Members-only exclusive content can help to foster a sense of community among fans.   | Bayern Munich, Liverpool, Manchester City, Real Madrid, Tottenham Hotspur |



## 3. Using Chinese digital platforms to win over consumers

| Platform  | Category     | Description   | Audience  | Best uses   | Used by*  |
|---|--------------|---|---|---|-----------|
| <br><b>WeChat</b><br>微信  | Social media | Most popular Chinese platform with a user base of more than 1 billion. Wide range of functions from sending free voice messages, videos, pictures and texts to sharing streaming media content and location-based social plug-ins such as Moment*, "Public Platform", "Voice Notepad" and "Mini Program."   | ≈1 billion daily users<br>75% < 35 years old,<br>21% < 25 years-old<br>53% male<br>47% female | WeChat is ideally-suited for providing ticketing and live broadcast information, as well as for content collaborations with public accounts that focus on tourism, life attitude, and city-related content. | All clubs |
| <br><b>Weibo</b><br>新浪微博 | Social media | Weibo is an extremely popular microblogging platform with a functionality and user experience that is similar to Twitter and with advanced lottery design functions.  | ≈211 million daily users<br>58% < 25 years old<br>56% male<br>44% female                      | Weibo is best used for prize draws, creating intra-community discussions, and publishing live information on ongoing events. Through its "Super Topic" function, Weibo offers a                             | All clubs |
| <br><b>Zhihu</b><br>知乎 | Q&A          | Zhihu is an online Q&A community that connects users from all walks of life and bears similarity to Quora. Users share each other's knowledge, experience and insights, and continuously provide a variety of information for the Chinese Internet. Users can discuss related topics around a certain topic of interest and follow people with identical interests. | ≈34 million daily users<br>70% of users are 20-29 years old<br>67% male<br>33% female         | Creating an account or inviting influencers to answer questions related to topics game strategies the football business could present a valuable PR opportunity for clubs on Zhihu.                         | PSG       |

\* Set of 15 European top clubs considered here: Juventus FC, AS Roma, AC Milan, Inter Milan, Borussia Dortmund, FC Barcelona, Real Madrid, Atlético Madrid, FC Bayern Munich, Paris St. German FC, Manchester United, Manchester City FC, Chelsea FC, Liverpool FC, FC Arsenal, Tottenham Hotspur FC.

Among 15 European top teams, FC Barcelona has the highest share of buzz per topic overall in China, followed by Manchester United. Bayern Munich achieves exceptionally strong buzz for its training content.

China Beats can also be used to investigate the Chinese consumers' digital response to the marketing activities of football clubs in detail through **custom buzz analyses**. Among other things, this allows us to identify and compare their respective share of buzz to **identify the clubs that are most successful in generating engagement with their content on Chinese platforms**.

The buzz-per-topic analysis below displays **the varying success with which European clubs use five popular activities as content topics to engage with Chinese consumers: Preparation tournaments, merchandising, e-sports, training camps, and youth training**.

## 3. Using Chinese digital platforms to win over consumers

### Buzz share per activity among 16 European top clubs

100% = Full share of buzz for one content topic

Platforms analyzed: WeChat, Weibo, and all relevant Chinese digital platforms. Contact us for a full list.

| Activity category >          | Preparation tournaments  | Merchandising  | E-Sports   | Training camps  | Youth training                             |
|------------------------------|--|--|--|---|--|
| <b>Content examples &gt;</b> | Game highlights, pre-game interviews, training highlights, ... | Raffles & contests, brand collaborations, product announcements... | Collaboration & sponsorship announcements, e-sports team highlights, ... | Training highlights, interviews, camp tours, humorous videos, ... | Talent show-cases, training snapshots, ... |
| Juventus FC                  | 6,80%  | 4,60%  | 6,10%  | 5,70%   | 6,80%                                      |
| AS Roma                      | 4,90%  | 5,60%  | 3,30%  | 5,00%   | 4,00%                                      |
| AC Milan                     | 3,40%  | 2,00%  | 2,90%  | 2,30%   | 2,80%                                      |
| Inter Milan                  | 8,00%  | 6,20%  | 6,90%  | 4,30%   | 4,80%                                      |
| Borussia Dortmund            | 4,10%  | 11,90%   | 5,40%  | 9,80%   | 4,20%                                      |
| FC Barcelona                 | 13,70%   | 12,80%   | 14,10%   | 13,30%  | 11,70%                                     |
| Real Madrid                  | 9,40%  | 7,30%  | 11,00%   | 8,90%   | 9,60%                                      |
| Atlético Madrid              | 3,20%  | 2,00%  | 2,90%  | 2,00%   | 3,70%                                      |
| FC Bayern Munich             | 7,80%  | 6,40%  | 5,70%  | 10,60%  | 4,90%                                      |
| Paris St. German FC          | 1,00%  | 2,10%  | 1,90%  | 0,80%   | 0,80%                                      |
| Manchester United            | 9,10%  | 11,00%   | 8,40%  | 10,20%  | 11,90%                                     |
| Manchester City FC           | 5,20%  | 5,40%  | 7,00%  | 4,60%   | 6,00%                                      |
| Chelsea FC                   | 5,90%  | 9,00%  | 5,50%  | 6,90%   | 8,00%                                      |
| Liverpool FC                 | 7,40%  | 7,90%  | 10,30%   | 6,50%   | 8,10%                                      |
| FC Arsenal                   | 5,20%  | 3,00%  | 5,30%  | 6,10%   | 7,50%                                      |
| Tottenham Hotspur FC         | 5,00%  | 2,90%  | 3,20%  | 3,00%   | 5,40%                                      |

Source: Buzz data April 2019-July 2020, [www.chinabeats.io](http://www.chinabeats.io)

According to this analysis, the FC Barcelona is the most successful European club in leveraging these activities to create buzz among Chinese consumers. Barca managed to garner **the overall highest share of buzz** for all topics, followed by Manchester United and Real Madrid. This success can be explained by looking at the strong physical football infrastructure it has built in China, which also serves to elevate its brand image by fostering positive buzz and enabling engaging content. Barca entertains **football academies in Haikou, Qingdao, Chengdu, Kunming and Lijiang** and holds an annual “Barca Academy China Cup” in Haikou, where the academies compete against each other. The new Barça Experience complex has become a major attraction in Haikou, featuring a megastore, an interactive museum, football pitches and more. The Catalan club is also remarkably active in the area of e-sports, garnering the highest share of buzz in this relatively new but increasingly important topic.

Paris St. Germain, on the other hand, turns out to be the most inactive club brand of all, creating very low buzz for all activities considered – which **strongly suggests that the Paris club is not actually initiating these activities to a competitive degree.**

## 4. Successful Branding Activities in China: Examples

### Case #1

#### FC Arsenal - WeChat Membership Services Integration

The official FC Arsenal WeChat channel provides Chinese fans with a convenient way of buying game tickets, the official FC Arsenal Chinese membership card, and other fan-centered offers without the need to visit the official club website. This includes an exclusive raffle allowing fans to bet online on the end result of a game and to win a free trip to London. Being a member also allows fans to sign up for members-only offline activities in various cities, including spectator events, carnivals for Arsenal fans, Arsenal on campus activities and others.



### Case #2

#### FC Barcelona - Football Academy and Barca Experience Store

Barca's Haikou Academy is one of only two academies in the world directly managed by FC Barcelona. It also hosts the Barca Academy Cup accompanied by heavy promotion through Barca's social media channels. In Haikou, Barca also maintains a Barca Experience Store – the only officially authorized fan shop in China – selling exclusive merchandise. It also features an exhibition center with seats shipped from Camp Nou and representing different stadium eras. Overall, Barca entertains football academies in five Chinese cities.

### Case #3

#### FC Bayern Munich - China-Germany Dialogue

In cooperation with Audi, one of its main sponsors, the FC Bayern Munich provides fans with exclusive content under the #MiaSanFamily and #AudiFCBtour hashtags centered around fostering a sense of community and China-Germany dialogue on its Weibo and WeChat channels. This includes live broadcasts of training sessions in Munich, as well as exclusive interviews by Chinese reporters with Bayern stars such as Thomas Mueller. At an online event, fans were also able to obtain modeled autographs of Bayern players created by an Audi robotic arm.



## 4. Successful Branding Activities in China: Examples

### Case #4:

#### FC Chelsea - Creative Raffles and Popular Band Promotion

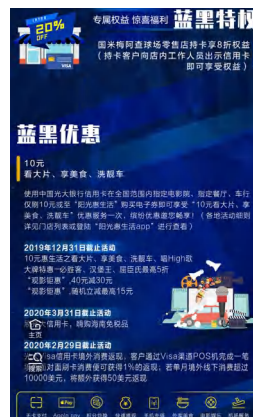
Under the Hashtag #AttackingBlueMan, the FC Chelsea encouraged its Chinese fans to design fantasy-style posters featuring Chelsea players and different kinds of weapons on its Weibo channel. Makers of the most-liked posters received various goodies such as branded cards, cups, scarves. Chelsea was also able to generate a high level of attention through the popular band Xiongmaoyan, which wrote a Chelsea fan song and played it on a Chinese music competition TV show – one of the band members is a Chelsea fan. Soon after, Chelsea invited the band to join its livestream on August 1st, the night before the FA Cup finale,



### Case #5:

#### Inter Milan - Intelligent Brand Cooperation

Acting on its good understanding of its Asian audience, the majority of which is in the age of 30-45 and has a relatively high purchasing power, Inter Milan cooperated with China's leading liquor brand Moutai Chun to introduce a co-branded Liquor with a price tag of around 100 Euro. This limited edition has now become a sought-after collectible item. Likewise, in cooperation with Everbright Bank and Suning Group, Inter's majority stakeholder, the club introduced a unique range of credit cards tailored towards different fan demographics. There is a black card alluding to Inter's long club history, a female-only turquoise card which represents good luck, and a blue "galaxy" card representing its iconic jersey design. Card owners can also enjoy a discount in selected stores, cinemas, restaurants, carwash services belonging to the Suning Group. Both collaborations were heavily promoted on Inter's WeChat account.





# 05.

## 4. Successful Branding Activities in China: Examples



### Case #6:

### AS Roma & AC Milan - New Season Jerseys Promotion

On its Weibo channel, AS Roma heavily promoted its new season home shirts, paying tribute to the 40th anniversary of winning the Italy Cup finals in 1980. Likewise, AC Milan promoted its new Puma jerseys on Weibo, also offering a jersey customization service on its Chinese website.

### Case #7:

### Manchester United - Cooperation with a Key Opinion Leader (KOL)

ManU cooperated with one of its most prominent Chinese fans, pop singer and actor Lu Han, inviting him for live commentary on its Weibo channel and to visit the club's grounds in Manchester. The club also donated football equipment to children in elementary schools in remote areas of the relatively poor Guizhou Province, where Lu Han initiated the "Football First Lesson" charity project.



## 06.

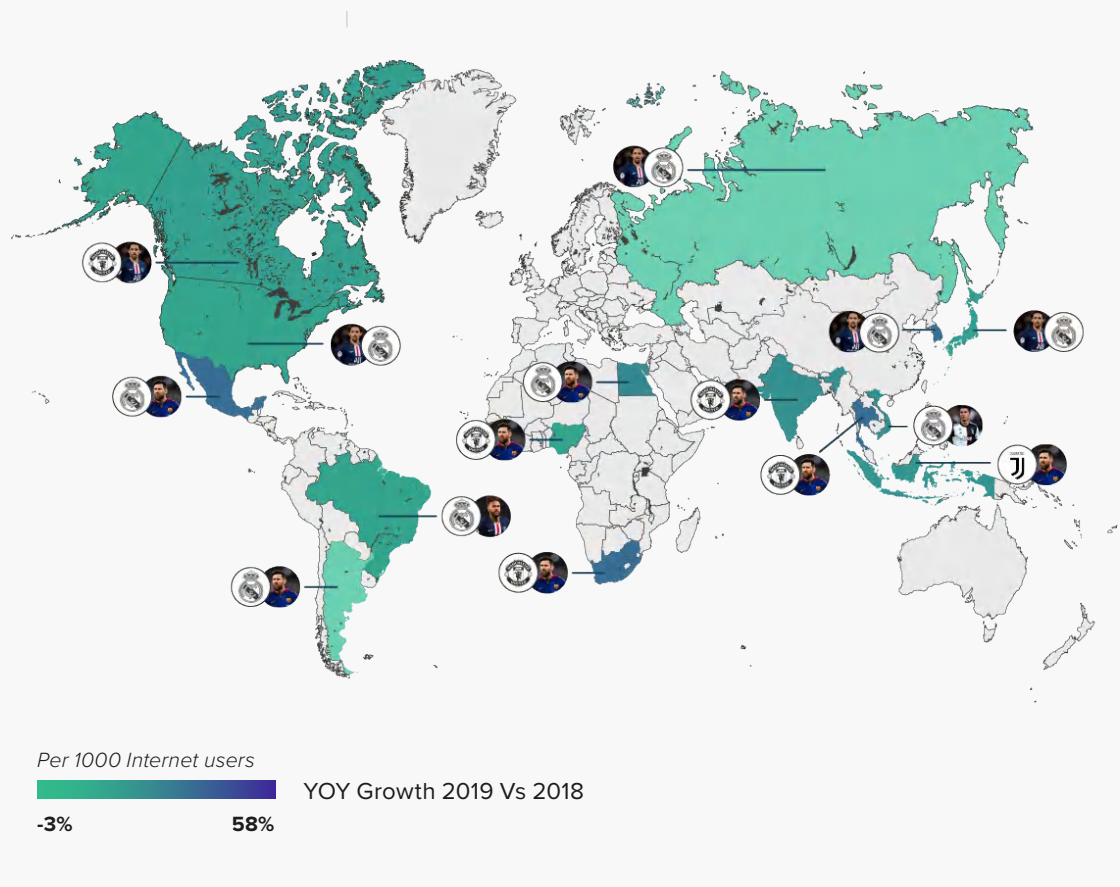
## Beyond China: Exploring new markets with the help of digital data

**Promising new growth opportunities beyond China and the U.S. can be identified by using digital data to analyze the share of interest in European clubs as compared to national clubs across multiple emerging markets around the globe.**

While China is currently the most promising growing football market in terms of economic opportunities, clubs looking to increase their global footprint should keep track of all emerging markets to spot exciting new opportunities on time. An effective way to do so is by tracking and analyzing the development of **relevant online searches around all emerging football markets around the globe.**

### Clubs and players garnering the highest interest across multiple emerging football markets 2018-2019

Unit: Trillion RMB



Source: Growth of Google searches 2018 vs. 2019 for 16 European top clubs and their players, Google Ads.

# 06.

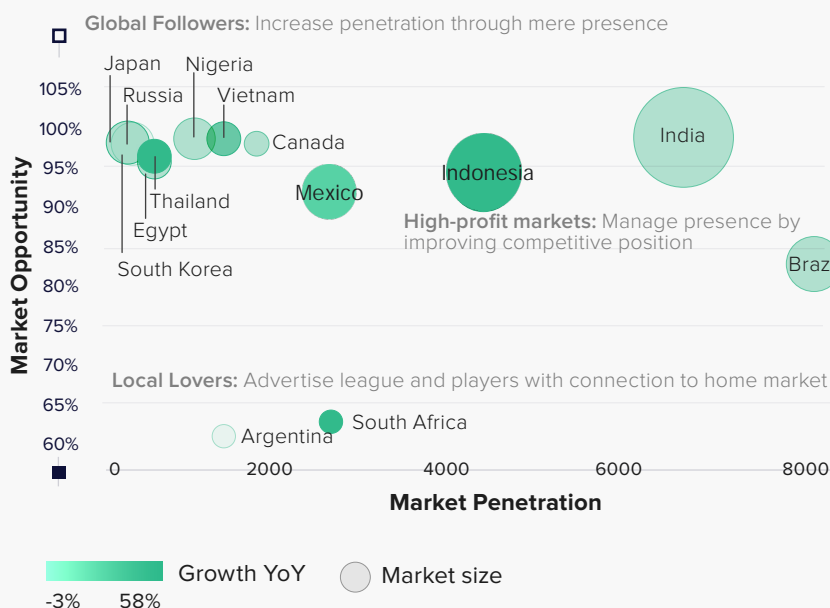
## Beyond China: Exploring new markets with the help of digital data

Looking at the growth of Google searches for 16 European top clubs and their players across emerging markets since 2018 (excluding China), it becomes obvious that only three clubs dominate the global interest. Real Madrid attracts the most interest of all clubs, being the most searched club in nine markets, followed by Manchester United with four markets and Juventus Turin with one market. Curiously, Manchester United is the most searched club in all Commonwealth states considered: Canada, India, Nigeria, and South Africa. Again, the strength of ManU brand history prevails over the club's lackluster performance on the pitch.

Among the players, PSG's Brazilian **central defender Marquinhos is the second most searched player in the emerging markets**, behind Lionel Messi but ahead of Cristiano Ronaldo and his PSG colleague Neymar. This proves that search data-based analyses can yield very surprising results that run contrary to what gut feelings would suggest. For PSG, which ranks among the most searched clubs while the Ligue 1 is the least searched European top league in the emerging markets, Marquinhos can be safely regarded as one of the **key global brand awareness drivers**, along with Neymar. The role of players in driving brand awareness is also underlined by Juventus, which has become the third **most-searched club** in the world following the **Cristiano Ronaldo purchase**.

Identifying the most promising emerging markets for European top clubs

Source: Emerging markets search data for clubs and leagues 2018-2019, Google Ads.

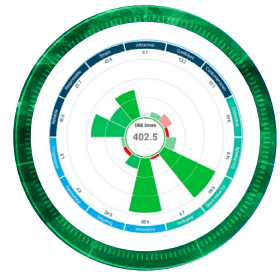


From the openly available search data, much more complex analyses can be derived, for instance to determine the **best emerging market opportunities**. In the example above, this was done by identifying the share of interest in the respective market that went into European top leagues, compared to the local leagues. From this analysis it follows that markets such as Argentina and South Africa demonstrate relatively small interest into European leagues. They can be classified as “Local Lovers” – markets in which the local leagues attract so much attention that European clubs are limited in their potential to garner enough awareness for growth unless they can leverage Argentinian or South African players. “**High Profit Markets**” such as **Indonesia, India, and Brazil** on the other hand, offer vast opportunities for growth with their market size and strong interest in European clubs. Indonesia is particularly interesting by being the least penetrated by European clubs of the High Profit Markets at this moment, while demonstrating very high growth in interest in them at the same time and having a large market size. European clubs would therefore be well-advised to **gauge their opportunities in the Indonesian market**.

## 1. Listen to consumers

*to foster a unique, favorable brand image*

- Track and analyze consumer interest in emerging markets across the whole world to identify new business opportunities with the help of TD Reply's data-driven business solutions
- Profit from the 20-year experience of TD Reply in consulting major football sponsors across different industries
- Use the game-changing China Beats football dashboard to take the Chinese market by storm. Track search
- and buzz data, top consumer trends, most popular players, top Key Opinion Leaders (KOL), regional growth opportunities and more



## 2. Increase brand awareness

*by leveraging opportunities*

- Make use of TD Reply's DBE approach to measure and benchmark your brand image against competitors in target markets
- Listen to consumer desires by analyzing the content and data they generate on digital platforms in-depth with the help of TD Reply's marketing consultants



## 08. Tools

We develop a growing number of innovative advanced analytics tools that also act as our principle data sources.

Don't hesitate to contact us for more information.



CHINA BEATS

A consumer intelligence platform specifically developed to make the Chinese consumer and market understandable for Western companies by tracking and analyzing data from the most relevant Chinese eCommerce, news, search, social media, and other platforms.



A highly flexible, low time-to-market business dashboard builder that can incorporate existing dashboards and boasts a rich set of unique predefined modules such as a Digital Brand Equity and the Virtual Marketing Assistant.



The only fully data-driven and search engine-independent trend research platform that automatically scrapes over 60 million scientific and mass media articles as well as patent registers in response to individual queries.



DATA CREATIVITY  
SCORE

The first working approach to quantify and benchmark the creative impact of campaigns by using a combination of AI, buzz analysis and advanced marketing theory.



TD QUENTIN

TD Reply's search volume analysis tool enabling the daily tracking of organic search volume per country and single keyword level. Used in most of our search data analyses.

# 09. Contact

## Contributors

**Researchers:** Dr. Tobias Reckmann, Alexander Schmidt, Zhe Fang, Esther Taan, Yuling Tan, Maria Hoefs, Margot Vieux

**Editor:** Leo Zalischiker

**Design:** Khaled Mebarki, Leticia Puerta Mascaro



Lars-Alexander Mayer

**Partner**

+49 177 2678149  
la.mayer@reply.de



Anja Kielmann

**Senior Director**

+49 0170 7677048  
a.kielmann@reply.de

**Get In Touch**

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WE DRIVE CHANGE  
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