



# An Analysis of the 2014/15 European Football Season in the Chinese Market



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# Introduction

✂ This analysis is about the overall performance of European football (including leagues, clubs and commercial games in China) in the Chinese market and its business development. This report uses the top 5 European football leagues as the main subjects of the analysis because they are the representatives of European football in China.

✂ The media referred to in this analysis:

- TV: Includes the national sports channel CCTV 5 and over 40 local sports channels based in Beijing, Shanghai and Guangzhou.
- New media: Online coverage and the amount of football-related searches.
- Social media: Mostly Sina Weibo

✂ Data comes from third-party sources.

✂ This report has been specially created by Yutang Sports for the Soccerex Global Convention 2015.

Note: This report was kindly proofread by Raymond Fitzpatrick.





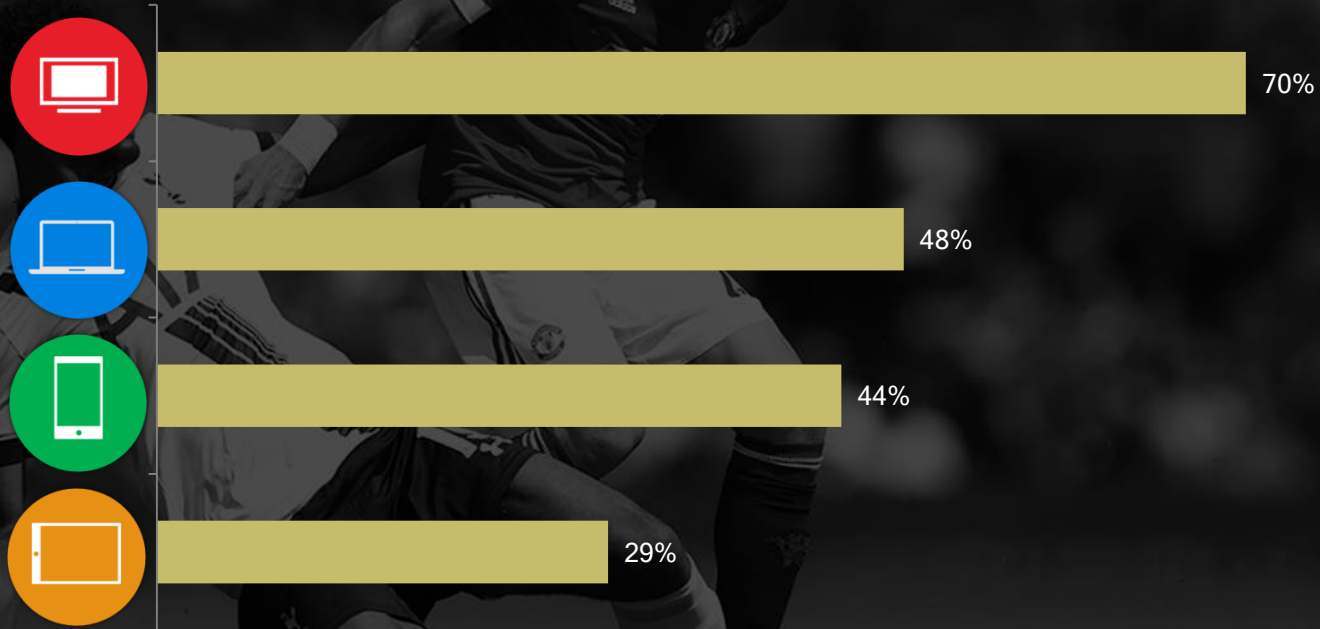
# Contents

## 📌 Leagues' performances in the Chinese market

- 📌 The UEFA Champions League
- 📌 Football clubs
- 📌 Commercial games in China
- 📌 Chinese sponsors

Despite rapid developments in new media, Chinese fans still watch live football matches mainly on TV.

### Media where Chinese fans watch football matches



High definition  
No buffering  
problems  
Good penetration





TV: Premier League matches were only aired on local channels. La Liga and Bundesliga games were shown on both local channels and CCTV 5. No TV channel covered Ligue 1.



Satellite channels	None	CCTV-5	CCTV-5	CCTV-5	None
Local channels	BTV Sports Great Sports Guangzhou, Sports channels of Shenzhen, Tianjin, Xinjiang, Shandong, Fujian, Gansu and Jilin Total: 19 channels	BTV Sports Great Sports GDTV Sports sports channels of Wuhan, Fujian, Shandong, Liaoning, Jiangsu and Xinjiang Total: 9 channels	GDTV Sports Great Sports and sports channels of Fujian, Shandong and Liaoning Total: 5 channels	GDTV Sports and sports channel of Xinjiang Total: 2 channels	None

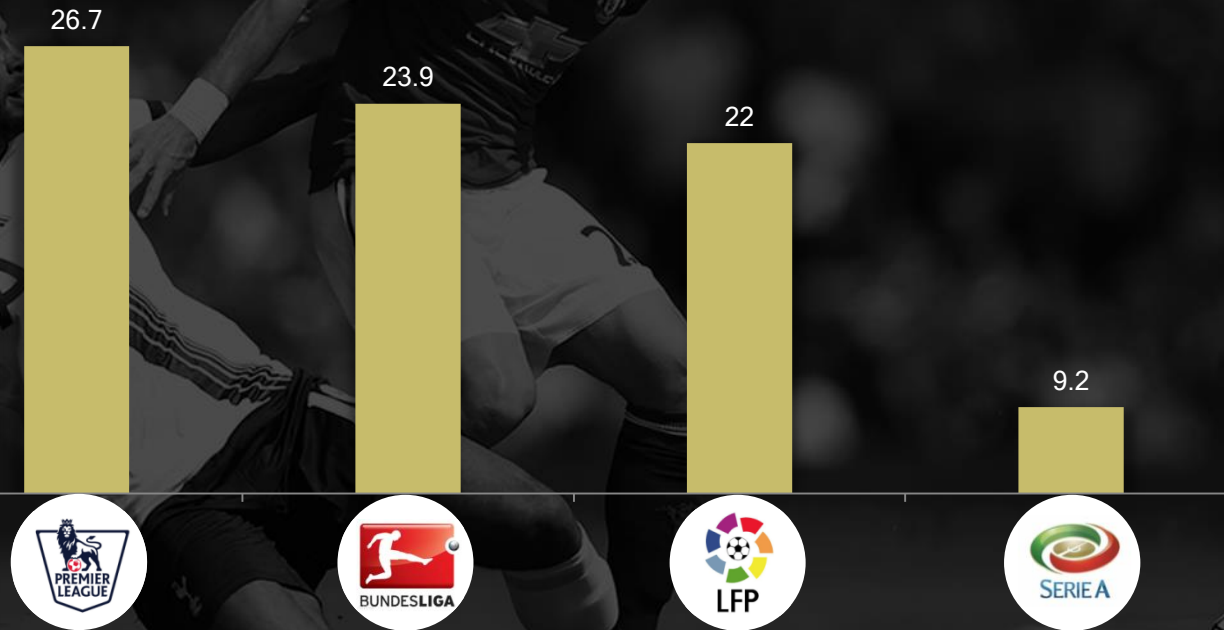
TV: The Premier League ranked first in terms of total broadcasting time, although its matches were not aired on satellite channels. La Liga and Bundesliga came second and third respectively. Serie A found itself at the bottom.

Broadcasting time of 2014/15 season European leagues (hrs)



TV: The Premier League had the highest penetration rate of 26.7%, which means it reached 350 million audience. The penetration rate of Serie A was less than 10%.

Penetration rates of 2014/15 season European leagues on Chinese TV channels



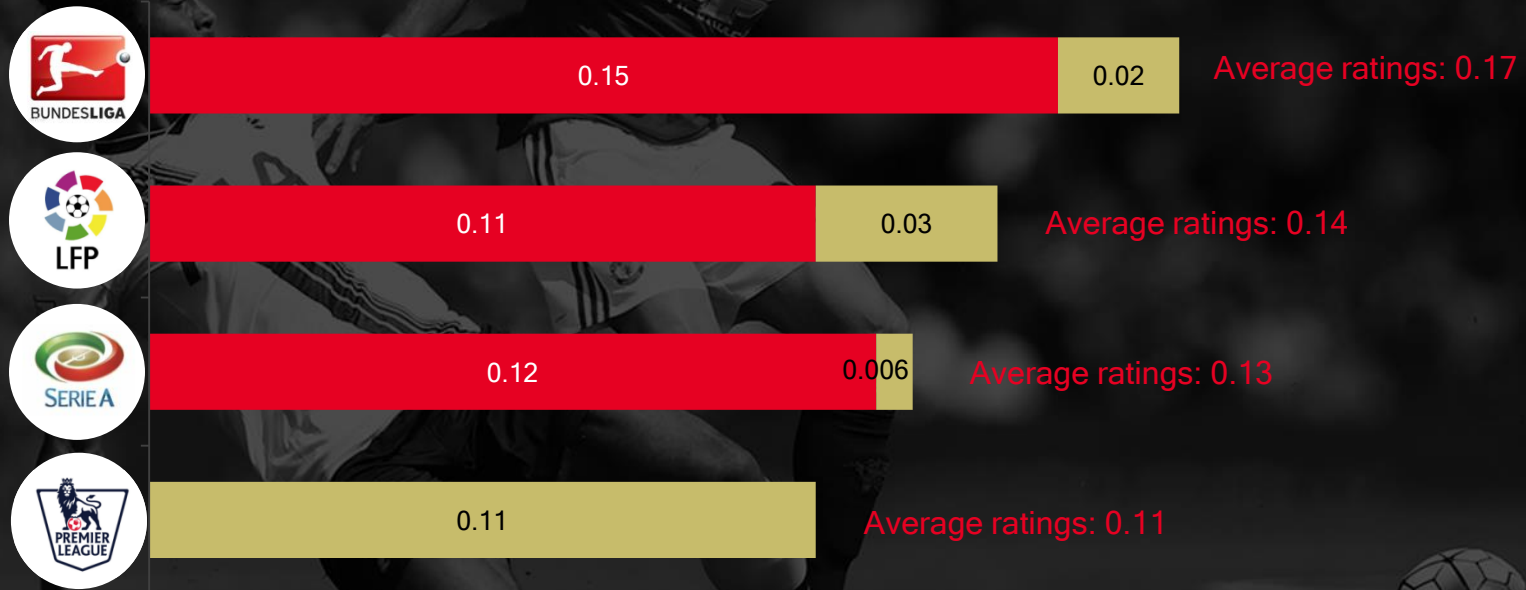
Source data: CSM, 4+ age group, 35 cities.



TV: Media platforms played a key role in the popularity of football games. CCTV 5 boasts the biggest influence, contributing to Bundesliga's top-ranking ratings. Ratings of the Premier League on local channels were far higher than those of other leagues.

### Ratings of live matches of 2014/15 European Leagues Season on Chinese TV channels

■ CCTV 5 ■ Local channels





TV: The ten matches with the highest ratings on CCTV 5 were all matches involving top teams in Europe's Top 5 leagues. La Liga filled the top 2 spots. The kick-off time had a big influence on matches. Most of the top ten games kicked off at around 10 pm Beijing Time.

Ranking	League	Match	Date	Start Time	Ratings
1	La Liga	Real Madrid VS Barcelona	2014-10-25	23:53:30	0.84
2	La Liga	Real Madrid VS Granada	2015-04-05	17:59:08	0.57
3	Serie A	Español VS Barcelona	2015-04-25	21:57:20	0.50
4	Serie A	Roma VS Napoli	2015-04-04	18:29:54	0.40
5	Bundesliga	Bayern Munich VS Werder Bremen	2014-10-18	21:29:27	0.39
6	Bundesliga	Hoffenheim VS Bayern Munich	2015-04-18	21:28:56	0.35
7	Bundesliga	Bayern Munich VS Augsburg	2015-05-09	21:45:30	0.33
8	Bundesliga	Bayern Munich VS Werder Bremen	2014-10-18	22:32:18	0.31
9	Bundesliga	Mönchengladbach VS Dortmund	2015-04-11	21:36:40	0.31
10	Bundesliga	Bayern Munich VS Hoffenheim	2014-11-22	22:30:09	0.30

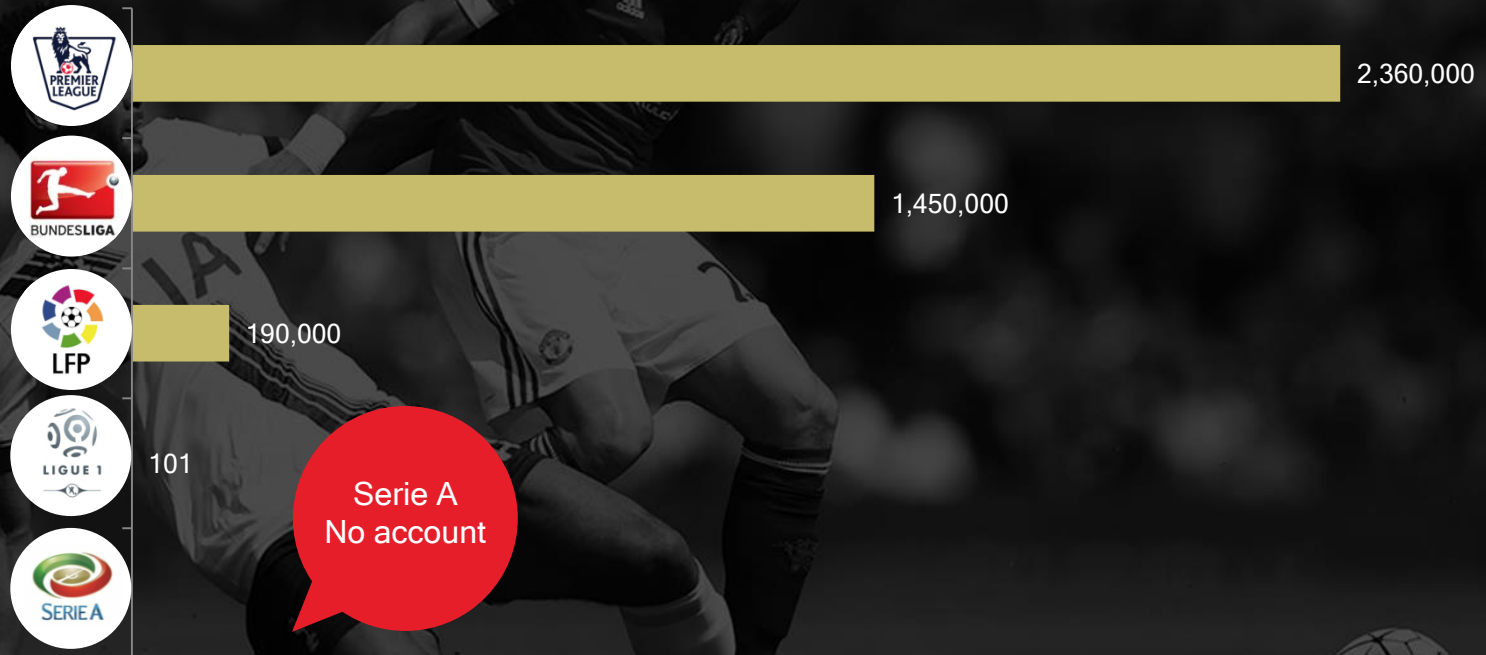
New media: The Premier League has the largest exposure – nearly twice that of La Liga. Ligue 1 had the lowest exposure leaving it trailing behind the others.

2014/15 season performance of European football leagues on Baidu Media Index



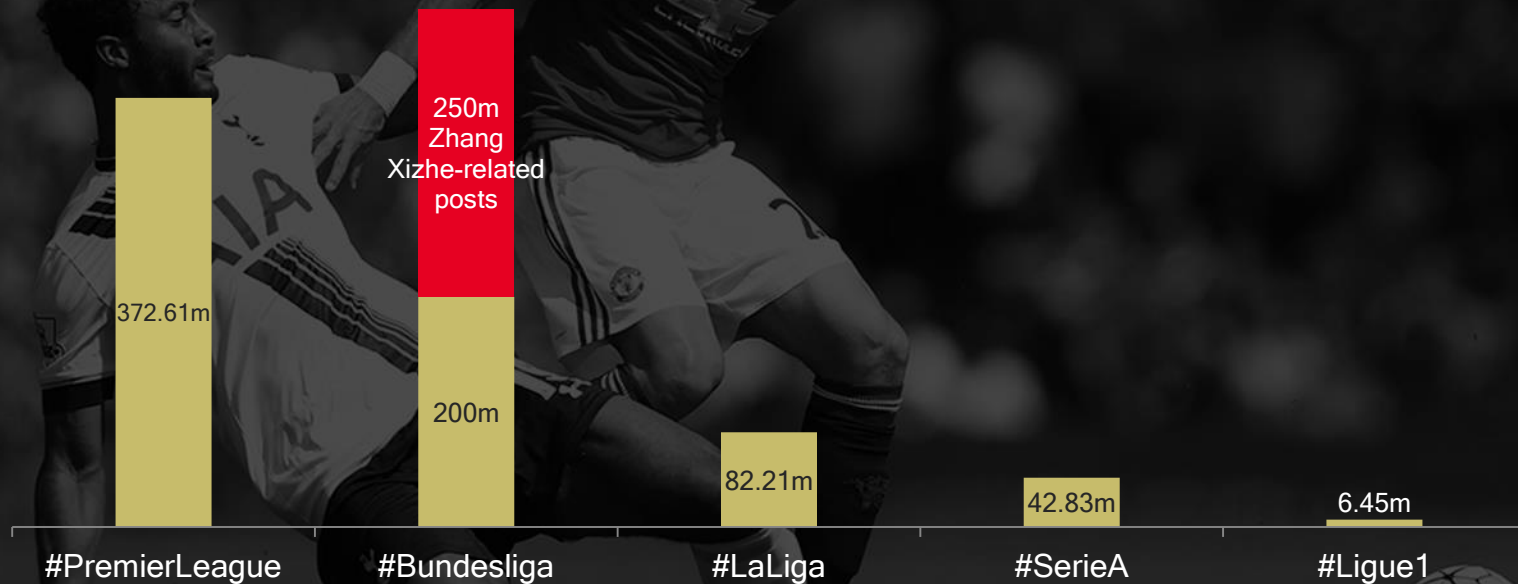
Social media: The Premier League account had the highest number of followers, with Germany's Bundesliga following behind. Serie A does not have an official league account on Weibo.

Followers of official European football league accounts on Weibo



Social media: the #mentions of Bundesliga and the Premier League had the highest impressions. What is worth noting is that more than half of the #Bundesliga posts were associated with Zhang Xizhe, the player whose purchase by VfL Wolfsburg was considered a marketing trick.

Impressions of #mentions of European leagues on Weibo





# Contents

⌘ Leagues' performances in the Chinese market

⌘ **The UEFA Champions League**

⌘ Football clubs

⌘ Commercial games in China

⌘ Chinese sponsors



2014/2015 UEFA Champions League Chinese Telecasts:  
Only CCTV 5 had live broadcasting rights.



As the knock-out stages progressed, the ratings got higher and higher as more top teams in Europe played. As the competition reached the quarter final stages its ratings were 2 times higher than that of the group stage.



The 10 games that ranked the highest in ratings were primarily competitions between the best teams in European leagues, with Barcelona matches accounting for half. Audience statistics were mostly higher than 10%, i.e. 1 person out of 10 people who had TVs on tuned-in to watch the game.

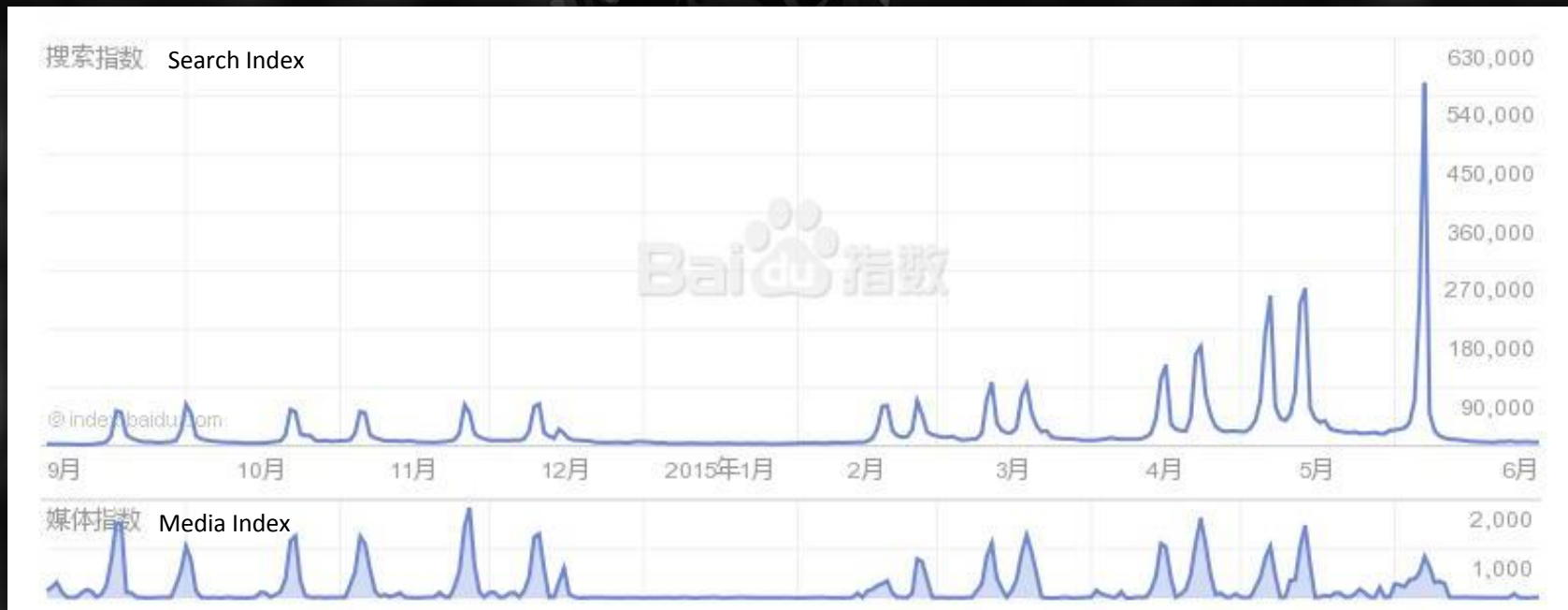
Match	Versus	Date	Start time	Ratings	Audience shares
Final	Barcelona VS Juventus	2015-6-7	02:28:02	0.60	42.50
Semi Final 2 <sup>nd</sup> Leg	Real Madrid VS Juventus	2015-5-14	02:30:41	0.20	24.48
Quarter Final 2 <sup>nd</sup> Leg	Real Madrid VS Atletico Madrid	2015-4-23	02:31:10	0.17	18.50
Semi Final 1 <sup>st</sup> Leg	Barcelona VS Bayern Munich	2015-5-7	02:30:32	0.14	20.54
Semi Final 2 <sup>nd</sup> Leg	Bayern Munich VS Barcelona	2015-5-13	02:30:41	0.13	16.17
Group stage	Barcelona VS PSG	2014-10-1	02:35:02	0.11	10.66
Round of 16	PSG VS Chelsea	2015-2-18	03:30:32	0.11	11.55
Round of 16	Barcelona VS Manchester United	2015-3-19	03:30:31	0.11	13.76
Round of 16	Chelsea VS PSG	2015-3-12	03:30:42	0.10	11.21
Quarter Final 1 <sup>st</sup> Leg	Atletico Madrid VS Real Madrid	2015-4-15	02:40:31	0.10	14.03

On the night of UEFA Champions League Final, CCTV 5 placed first in terms of ratings compared with other satellite channels. Its ratings were well above that of CCTV 6 (Movie channel) in 2<sup>nd</sup> place and was over 10 times higher than other channels.

Ranking of channel ratings on the night when CCTV 5 screened live the final of 2014/2015 UEFA Champions League



Regarding digital media, people's attention on the event was around match periods. While at other times people's attention on the match was generally little. The Final drew twice the attention than it has acquired at other times.

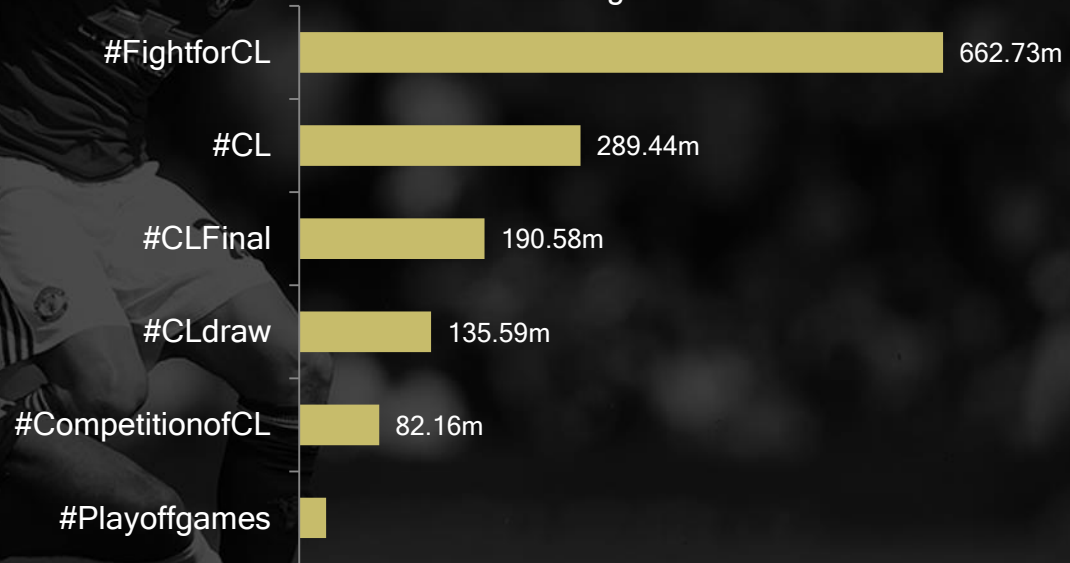




Social media: The number of followers on the official Weibo account of UEFA Champions League is more than 2 million but there have been no updates since Oct. 2014. Reads of these posts which have hash tags related to Champions League were more than 1 billion and most reads happened around the Final.



Reads of popular hash tags related to UEFA Champions League\*





# Contents

🏆 Leagues' performances in the Chinese market

🏆 The UEFA Champions League

🏆 **Football clubs**

🏆 Commercial games in China

🏆 Chinese sponsors

## TV: Comparisons of the number of games of different teams covered on TV.

### The Premier League

**Man Utd.**

Arsenal

Chelsea

Man City

Liverpool

### La Liga

Real Madrid

Barcelona

Atletico Madrid

Real Sociedad

Villarreal

### Bundesliga

Dortmund

Bayern Munich

Bayer Leverkusen

Moenchengladbach

Stuttgart

### Serie A

A. S. Roma

Inter Milan

Juventus

AC Milan

Udinese



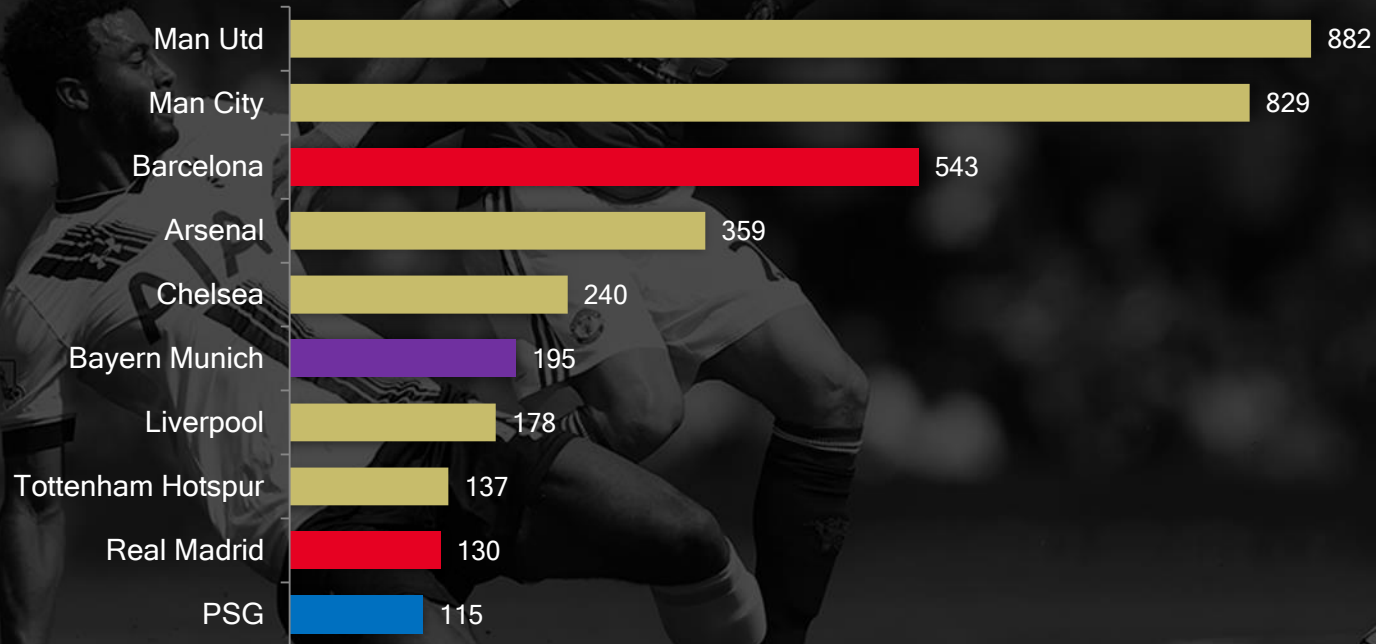
Social media: exposure of Real Madrid, Man Utd. and Barcelona on social media were the highest. Bayern Munich was the only Bundesliga club in the Top 10.

Baidu Media Index of 2014/2015 European football clubs



Social media: The Premier League clubs occupy most positions which indicates the big influence it has in the Chinese market.

Top 10 clubs that have the largest fan base on Weibo ( in10k )



Data source: Sina Weibo, by the end of July 20, 2015.





# Contents

🏆 Leagues' performances in the Chinese market

🏆 The UEFA Champions League

🏆 Football clubs

🏆 **Commercial games in China**

🏆 Chinese sponsors

Over the past summer, there were 10 pre-season and commercial matches played in China. Bayern Munich, Real Madrid, AC Milan and Inter Milan all came to China.

7.18@Beijing



7.23@Guangzhou



7.27@Guangzhou  
International Champions Cup



7.21@Shanghai



7.25@Guangzhou  
International Champions Cup



8.4@Shanghai



7.28@Nanjing



8.8@Shanghai  
Italian Super Cup








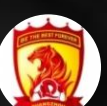














7.30@Shanghai  
International Champions Cup



7.27@Nanjing



Ratings: Top European clubs against top Chinese clubs attracted the higher ratings.

CCTV 5	Great Sports	GDTV Sports
  1.35	  1.14	  1.11
  0.62	  0.74	  0.16
	  1.94	  0.49
	  1.01	  0.49



New media: International Champions Cup came to China for the very first time. The combination of Real Madrid, AC Milan and Inter Milan contributed to high public attention. Bayern Munich against Guangzhou Evergrande ranked 2<sup>nd</sup>.

### 2015 Performance of Commercial Matches on Baidu Index







# Contents

🏆 Leagues' performances in the Chinese market

🏆 The UEFA Champions League

🏆 Football clubs

🏆 Commercial games in China

🏆 Chinese sponsors



A rapid rising market: Football is becoming more and more popular in China.

## Policy

Government  
announced 2015  
China football reform.

## Economy

The second biggest  
market needs more  
sports.

## Broadcast

China loosens  
restrictions on  
broadcast rights.

## Fans



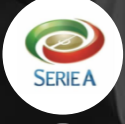

A giant fan base, and  
an  
enormous consumer  
market.

## Brand

More brands  
demand sponsorship  
opportunities.



# Broadcasting rights holders of the 2015/2016 Top 5 European football leagues in mainland China

	Online rights	TV rights
	Super Sports, Letv, Tencent, Sina	CCTV 5, local sports channels
	PPTV, Letv Sports	CCTV 5, local sports channels
	PPTV, Letv Sports	CCTV 5, local sports channels
	Letv Sports	CCTV 5, local sports channels
	Letv Sports	None



Chinese brands are more enthusiastic about sponsoring European football clubs than ever before. La Liga clubs have the most Chinese sponsors, with Serie A and Ligue 1 not really popular.



## Chinese Capitals in European football leagues.

2015-1

United Vansen purchased  
98% of ADO Hague in KNVB  
for 8 million Euros.



2015-5

Ledus purchased Sochaux in  
French Division with 7 million  
Euros.



2014-7

Chinese fans crowdfunded for SD  
Eibar in La Liga, and became the  
second biggest overseas  
shareholder of this team.



2015-1

Wanda purchased 20% of the  
shares of Atletico Madrid with  
45 million Euros.





THE END



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MANCHESTER

**07-09 SEPTEMBER 2015**



**YUTANG SPORTS**  
禹唐体育

OFFICIAL GLOBAL MEDIA PARTNER

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