

**CSM RESEARCH REPORT 2017**

# DANCING WITH THE DRAGON

– THE QUEST FOR THE CHINESE FOOTBALL CONSUMER –

# INTRODUCTION

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## **DEAR READERS,**

The Chinese government is pushing the country to become a powerhouse in football. Their ambitious plans include getting 50 million Chinese to play football by 2020, with the ultimate goal of winning the football World Cup in the next decades to come. China's concerted football engagement fertilizes the development of domestic football consumers supporting both domestic and foreign clubs. Winning over the Chinese football fan means competing with the well-advanced entertainment industry in China. The Chinese Super League and top European football clubs need to face their competitors from other sports and entertainment industries to take advantage of the current gold rush fever in football. Their efforts in growing a fan base will promote the sport to become a national pastime in China. For a fan culture to grow and fuel, it is crucial to understand how and why the Chinese people consume football – on the pitch as well as in the digital sphere. Furthermore, it is important to identify inherent motiva-

tions and needs (e.g., for drama, escapism, or knowledge) that influence the decision to watch football and to better target the communication toward sport spectators.

We decided to examine what a typical Chinese football consumer looks like. What are the motives to watch football? Which football stars and clubs are supported and why? What role do digital channels play for football consumption? How does a boom in esports affect sport consumer behavior? What are commonalities and differences between the Chinese and more or less advanced football markets abroad?

Accordingly, the Center for Sports and Management (CSM) at WHU – Otto Beisheim School of Management designed a representative survey across five different countries (China, Germany, USA, South Korea, and Japan) exploring individual spectator motives, characteristics of favorite players and teams, and sport (media) consumption behavior. The research

study was conducted with the support of Nielsen Sports. Overall, 5,000 people participated in the online survey and face-to-face interviews (China). Their opinions are representative for a population of 1.899 billion people in Asia, Europe, and the USA.

The survey results were discussed with China experts to derive recommendations for designing marketing and sales strategies tailored to win the Chinese football consumers.



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## CENTRAL THESES

**1** | *China is currently the most vibrant football market, and is on the verge of making football the best-loved sport in the country*

P. 10

**2** | *Currently, the typical Chinese football consumer is a male, mid-aged member of the Chinese middle class who watches football rather than plays it himself*

P. 14

**3** | *For Chinese football consumers, experiencing drama and gaining knowledge are most decisive for watching football*

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**4** | *Chinese consumers who do not watch football reason their disinterest with a lack of understanding of the game's rules*

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**5** | *Chinese football consumers tend to identify with a player rather than with a team*

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**6** | *For Chinese sport consumers, a player represents a role model if he is cool and good-looking with down-to-earth behaviors*

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**7** | *Chinese football consumers follow international superstars, while Chinese football players still play a minor role*

P. 17

**8** | *Although the player market in esports is still dispersed, Chinese football consumers are attracted to emerging esports stars*

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DANCING WITH  
THE DRAGON –  
THE QUEST FOR THE  
CHINESE FOOTBALL  
CONSUMER

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# CHINA IS CURRENTLY THE MOST VIBRANT FOOTBALL MARKET, AND IS ON THE VERGE OF MAKING FOOTBALL THE BEST-LOVED SPORT IN THE COUNTRY

## THE RESULTS FROM THE CENTER FOR SPORTS AND MANAGEMENT (CSM) SURVEY DEMONSTRATE THAT FOOTBALL CLUBS ENCOUNTER A HUNGRY FOOTBALL CONSUMER IN CHINA.

Today, 237 million people in China call football “my favorite sport” and, at 308 million, even more Chinese football consumers watch football at least once a week (see Fig. 1.1). Interestingly, the size of the Chinese football market potential is about nine times greater than the well-advanced German market and surpasses consumption of traditional sport such as badminton, table tennis, or volleyball. In addition, further potential to develop sport, and particularly football fans, is given by 414 million Chinese people that currently do not watch sport at all.

Only basketball is still more popular in Asia’s largest economy (CIA, 2015). However, football is set to become the number one sport in China – thanks to government support. When China’s president Xi Jinping announced the Chinese government’s strategic plan to become a world football superpower by 2050, the football world pricked its ears. China’s plan aims to provide a football pitch for every 10,000 people by 2030. Envisioning the male national football team as becoming one of Asia’s leading teams, the Chinese long-term goal includes hosting and eventually winning the football World Cup.

Professional clubs competing in the Chinese Super League (CSL) further fertilize the budding Chinese football market. The influx of big-name football players into the CSL is apparent, and transfer sums seem

to be skyrocketing. Recent examples include Brazilian Hulk’s €56 million transfer to Shanghai SIPG or Alex Teixeira’s €50 million move to Jiangsu Suning (Transfermarkt.com, 2016a). With €339 million in transfer money, Chinese Super League clubs outspent the Premier League in the winter transfer window 2015/16 – spending more than the other four major European leagues (Germany, Italy, France, and Spain) together (Transfermarkt.com, 2016b). Attracted by tremendous financial remuneration, the football stars’ rush to China cannot be expected to abate anytime soon. As a result, average attendance per game in the CSL rose by 50% over the last five years – amounting to 22,564 people per game (Transfermarkt.com, 2016c). European football clubs in particular have invested into enlarging their fan base beyond their rather established home mar-

kets. Having focused on developing the non-domestic European and the US football market over recent decades, European clubs now turn their attention to China as the number one target for international expansion. Besides summer tours, marketing events, and friendly games against local football clubs, European football clubs have professionalized their market presence in China. Top football clubs have set up their offices and hired local staff to better anticipate consumer needs and market trends to tailor their offerings.

For both European and Chinese football clubs, associations, and governmental institutions, now is the time to really understand Chinese sport consumption behavior in order to succeed in the quest for the Chinese football fan.

In the following, an in-depth analysis of the Chinese football consumer is provided based on socio-demographics, sport (media) consumption, motives and reasons for watching football and esports, and on the perception of football players and clubs, as well as on favorite players as role models (Understanding the Chinese football consumer, page 12). Commonalities and

differences between football markets in China and Germany, the United States, South Korea, and Japan are identified (The Chinese football consumer in comparison, page 20), and recommendations and an outlook on the Chinese football market are provided (page 26).

FIG. 1.1 FOOTBALL CONSUMER POTENTIAL ACROSS COUNTRIES IN MILLION

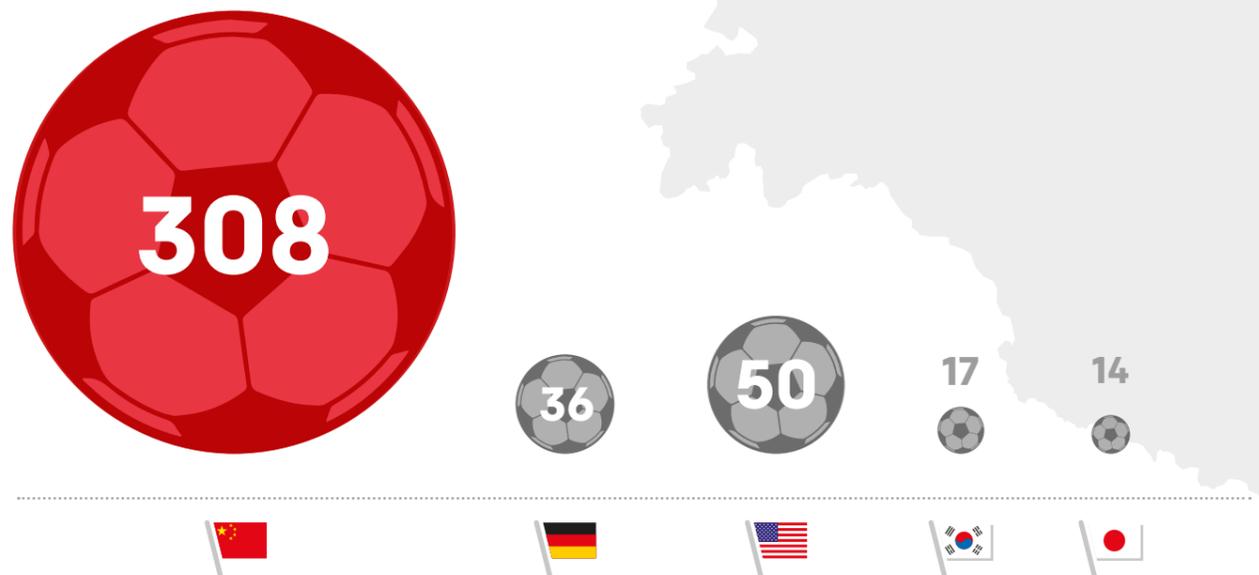
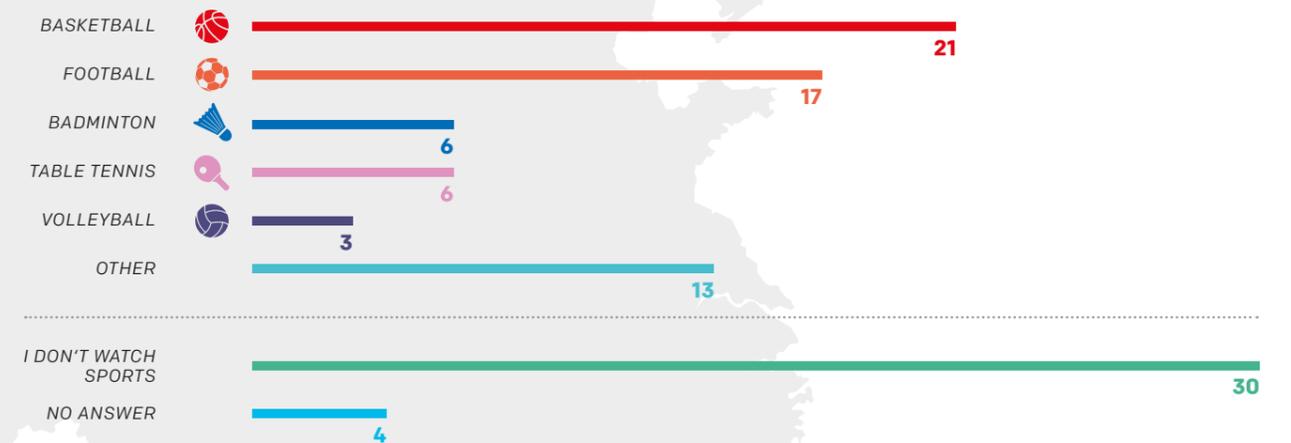


FIG. 1.2 FAVORITE SPORTS TO WATCH IN CHINA



N = 1,000 / VALUES IN %



UNDERSTANDING  
THE CHINESE  
FOOTBALL CONSUMER

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## CURRENTLY, THE TYPICAL CHINESE FOOTBALL CONSUMER IS A MALE, MID-AGED MEMBER OF THE CHINESE MIDDLE CLASS WHO WATCHES FOOTBALL RATHER THAN PLAYS IT HIMSELF

**BASED ON ANALYSIS OF VARIANCE, WE WERE ABLE TO SKETCH OUT THE "PROTOTYPE" OF THE CHINESE FOOTBALL CONSUMER. ACCORDING TO OUR REPRESENTATIVE SAMPLE, THE CHINESE FOOTBALL CONSUMER WHO WATCHES FOOTBALL AT LEAST ONCE A WEEK CAN BE CHARACTERIZED ALONG THREE DIMENSIONS:**

### 1 SOCIO-DEMOGRAPHICS

At 73%, the majority of current Chinese football consumers are male and on average 40 years old (M = 39.62 years, SD = 13.71). In terms of education and income, the typical Chinese football consumer is most likely to be a member of the rapidly growing middle class in China.

### 2 MEDIA CONSUMPTION AND SPENDING BEHAVIOR

Although only a few Chinese football consumers play football themselves – less than 7% play at least a few minutes a

week – their sport media consumption is relatively high. Considering only those respondents who watch football at least once a week, they spend approximately three hours (M = 2.87, SD = 3.47) of their seven hours of total sports consumption per week (M = 6.70, SD = 7.85) on watching football. In addition, 44% of Chinese football consumers use social media to follow sports content. Interestingly, they are most interested in stars and follow them primarily via Wechat (27%), Weibo (19%), and Renren (14%). Overall, sport media consumption translates into consumer spending of €15.68 per consumer, per year, on average. More than 50% of the spending contains merchandising items (see Fig. 2.2).

### 3 ESPORTS INTEREST

42% of the Chinese football consumers are at least slightly interested in esports, which is almost 20% higher compared to the entire Chinese sample. 15% of the Chi-

nese football consumers watch esports at least once a week – 10% more than among the full Chinese sample. For Chinese football consumers who named an esports title (55%), League of Legends is the favorite game (55%), followed by Counter-Strike: Global Offensive and World of Warcraft (9% each). Considering only those football consumers who watch esports at least once a week, they watch 7 hours (M = 7.36, SD = 14.48) and play 8 hours (M = 7.84, SD = 9.50) of esports in an average week. For Chinese football consumers, Youku (48%) is the most widespread streaming provider, followed by Douyu (42%).

FIG. 2.1  
"PROTOTYPE" OF THE CHINESE FOOTBALL CONSUMER

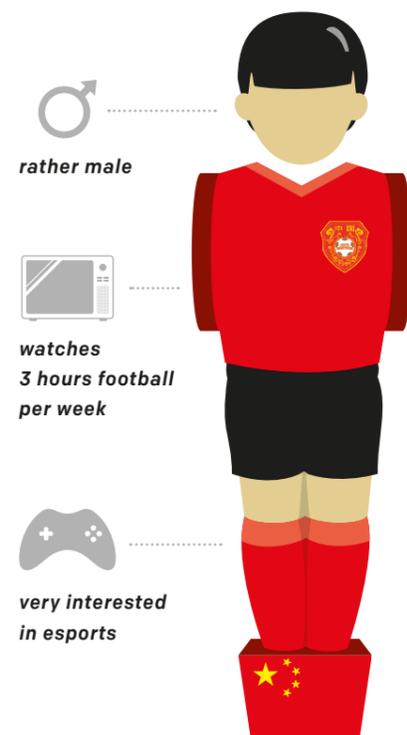
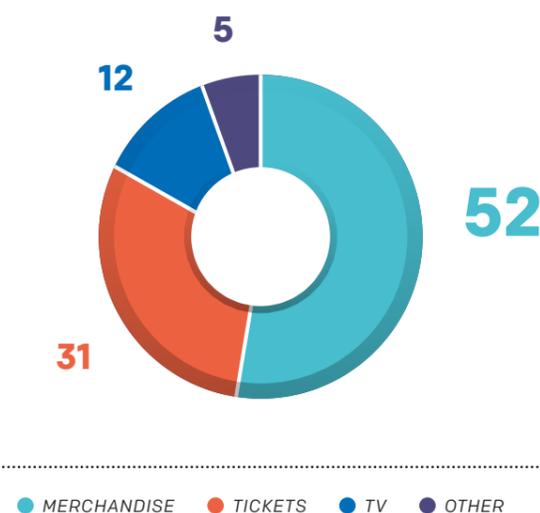


FIG. 2.2  
ANNUAL SPENDING OF CHINESE FOOTBALL CONSUMERS IN CHINA BY CATEGORY IN %

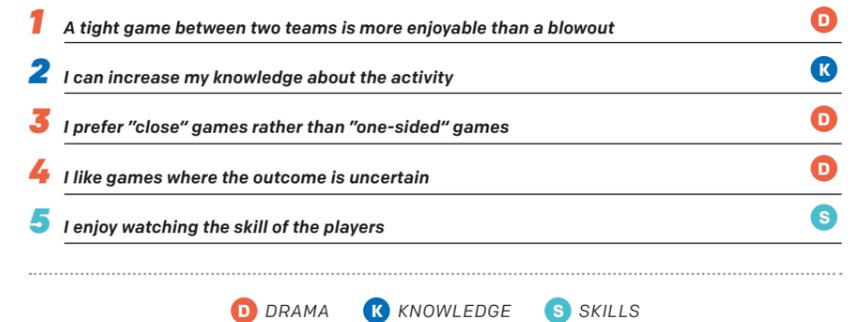


## FOR CHINESE FOOTBALL CONSUMERS, EXPERIENCING DRAMA AND GAINING KNOWLEDGE ARE MOST DECISIVE FOR WATCHING FOOTBALL

**CHINESE FOOTBALL CONSUMERS ARE PRONE TO DRAMA AND DERIVE PLEASURABLE STRESS FROM CLOSELY CONTESTED GAMES UNTIL THE VERY LAST MINUTE. THEY ARE KEEN ON FOOTBALL-SPECIFIC DATA.**

Among the top five factors for Chinese consumers watching football, three are related to experiencing drama (see Fig. 2.3). Drama reflects the motive that sport spectators feel positive stress and arousal from the uncertainty of the outcome of a sport event (Funk et al., 2002; Trail et al., 2000; Wann et al., 2008). Their excitement is often triggered by anxious uncertainty regarding the expected game and/or tournament outcome. When watching football, it is also very important for Chinese

FIG. 2.3  
MOST IMPORTANT FACTORS FOR WATCHING FOOTBALL IN CHINA



consumers to acquire knowledge about the specifics of the game. In this case, knowledge concerns the need to acquire information associated with football rules,

specific playing strategies and techniques, or with particular football players and teams (Andrew et al., 2009; Wang et al., 2013b; Trail & James, 2001).

## CHINESE CONSUMERS WHO DO NOT WATCH FOOTBALL REASON THEIR DISINTEREST WITH A LACK OF UNDERSTANDING OF THE GAME'S RULES

**CHINESE CONSUMERS' KNOWLEDGE ABOUT THE SPORT, THEIR EDUCATION, AND THE PEOPLE AROUND THEM IMPACT THE LIKELIHOOD OF THEM WATCHING FOOTBALL.**

Exploring the reasons why people in China are not interested in watching football established that almost every second Chinese respondent mentioned, "I don't understand the rules." The second most important reason (37%) is that they did not

grow up with football. Finally, friends' lack of interest in football (28%) influences Chinese not to follow football. These findings correspond to the Chinese football consumers' hunger for knowledge to become connoisseurs of the game.

FIG. 2.4  
REASONS WHY CHINESE ARE NOT INTERESTED IN WATCHING FOOTBALL



- 1 I don't understand the rules
- 2 I didn't grow up with football
- 3 My friends don't watch football

## CHINESE FOOTBALL CONSUMERS TEND TO IDENTIFY WITH A PLAYER RATHER THAN WITH A TEAM

**FOR CHINESE FOOTBALL CONSUMERS, A FAVORITE FOOTBALL PLAYER HAS A MORE PRONOUNCED ROLE THAN THE FAVORITE FOOTBALL CLUB DOES – THEY TEND TO IDENTIFY WITH HIM.**

Almost every second (49%) Chinese football consumer named a favorite football player, whereas only 32% stated a favorite football team (see Fig. 2.5). In addition, football consumers in China not only tend to support a favorite player rather than a favorite team, but also identify more strongly ( $M = 3.18$ ,  $SD = 0.99$ ) with their favorite football player than with their favorite football team ( $M = 3.13$ ,  $SD = 1.08$ ) (see Fig. 2.6). This strong identification with a star is a common phenomenon in many fan–star relationships, e.g., with musicians, movie stars, or celebrities from individual sports (Shih-Hao et al., 2012; Alperstein, 1991; Albert, 1998; Ravid, 1999). They are able to exert influence on their followers even without direct or personal interaction (Alperstein, 1991; Gibson, 2004).

A football player is to some extent always a representative of his team. Therefore, prominent football players also influence the degree to which their followers identify with their football team (Hoegel et al., 2014a; Fisher & Wakefield, 1998).

FIG. 2.5  
SHARE OF CHINESE FOOTBALL CONSUMERS WITH A FAVORITE PLAYER / FAVORITE TEAM

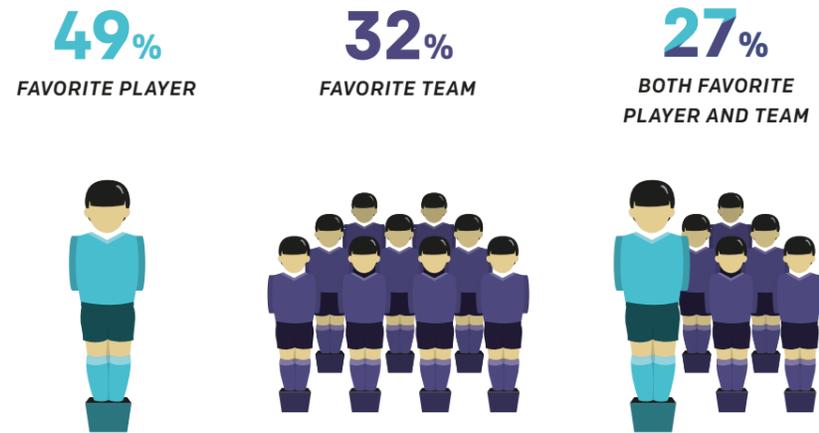


FIG. 2.6  
CHINESE FOOTBALL CONSUMERS' IDENTIFICATION WITH A FAVORITE PLAYER / FAVORITE TEAM  
MEAN ON 5-POINT LIKERT SCALE



## FOR CHINESE SPORT CONSUMERS, A PLAYER REPRESENTS A ROLE MODEL IF HE IS COOL AND GOOD-LOOKING WITH DOWN-TO-EARTH BEHAVIORS

**BASED ON ORDINARY LEAST SQUARE REGRESSION ANALYSES, ESPECIALLY MALE, SPORTIVE CHINESE SPORT CONSUMERS TEND TO PERCEIVE THEIR FAVORITE PLAYER AS A ROLE MODEL.**

A "role model" is a construct that helps humans with acquiring new capabilities and social norms and, further, to define their self-efficacy (Bandura, 1977). A precondition for the association of a role model is that the fan and the star share common interests. This precondition is met in our ordinary least square regression analysis. For a Chinese football consumer, however,

the characteristics of the favorite football player that lead to depicting the star as a role model reveal mixed and not significant results. Looking at the Chinese sport consumer irrespective of his favorite sport, it becomes apparent that further characteristics are decisive for qualifying a favorite player as a personal role model.

Although common interests remain the strongest predictor, the personality and talent of the players become significant, too. Having personal attributes such as a cool and relaxed manner, charisma, a personable manner, and down-to-earth behaviors, as well as being good looking,

seem to appeal to the Chinese sport consumer. In addition, the talent of the player is decisive to qualify the favorite player as a role model. Here, talent refers to the player's exceptional performance, as well as his spectacular style of play. Thus, it seems that Chinese sport consumers regard an appealing personality and exceptional talent as desirable for their own personal life. These results are in line with recent empirical findings on German football fans (Schmidt & Hoegel, 2011), who also valued coolness and appearance for a favorite player to act as a personal role model.

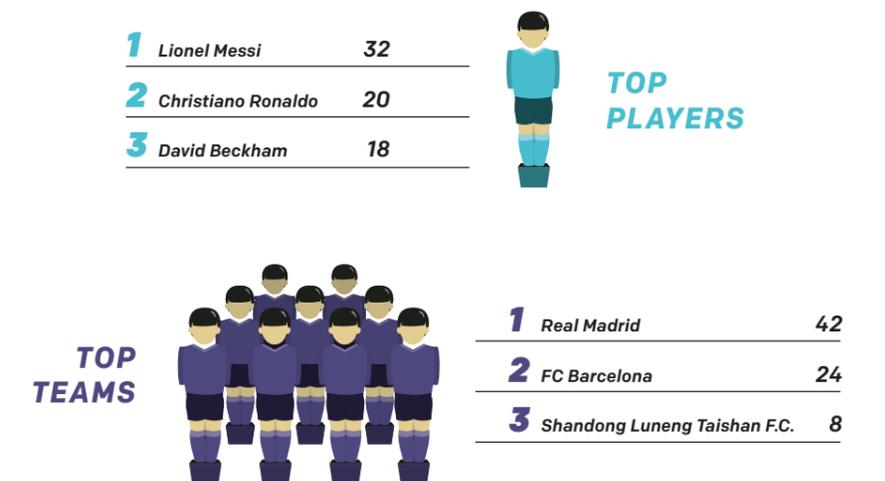
## CHINESE FOOTBALL CONSUMERS FOLLOW INTERNATIONAL SUPERSTARS, WHILE CHINESE FOOTBALL PLAYERS STILL PLAY A MINOR ROLE

**THE CHINESE FAVOR STAR PLAYERS AND FOOTBALL TEAMS FROM THE SPANISH LA LIGA.**

32% of the Chinese football consumers with a favorite football player follow FC Barcelona's Lionel Messi. Ranking in second and third place are Cristiano Ronaldo (20%) and David Beckham (18%), respectively. The highest-placed favorite Chinese football player, Yang Chen, ranks 6th (3%). All Chinese footballers mentioned play or used to play in the Chinese Super League.

Our data show that football clubs employing global superstars also appeal to an international audience. 42% of the Chinese football consumers who follow a favorite football team support Real Madrid. The second most popular team in China is FC Barcelona (24%) followed by Shandong Luneng Taishan F.C. (8%).

FIG. 2.7  
OVERVIEW OF TOP 3 FOOTBALL PLAYERS AND TEAMS IN CHINA IN %



# ALTHOUGH THE PLAYER MARKET IN ESPORTS IS STILL DISPERSED, CHINESE FOOTBALL CONSUMERS ARE ATTRACTED TO EMERGING ESPORTS STARS

## ESPORTS STARS ARE ON THE RISE IN CHINA AND APPEAL TO FOOTBALL CONSUMERS – ESPECIALLY TO THOSE WHO WATCH ESPORTS REGULARLY.

The favorite esports player in China is Chinese Jian "Uzi" Zi-Hao (13%), followed by South Korean superstar Lee "Faker" Sang-hyeok (10%) and Chinese Liu "mlxg" Shi-yu (10%). However, our results show

that the player market in esports is still dispersed and true star players are rare. Similar to football, favorite players play an important role for the Chinese esports fan – they have the highest percentage of respondents who state a favorite player compared to all other countries in our sample. The top four favorite teams in China are all Chinese organizations, with Edward Gaming (team of favorite player "Uzi") in the lead.

Looking at the Chinese football consumers, 42% are at least slightly interested in esports. However, only 4% of them named a favorite esports player and/or a favorite esports team. This changes dramatically when football consumers watch esports at least once a week: 27% of Chinese football consumers named a favorite esports player and 24% a favorite esports team.

FIG. 2.8  
TOP ESPORTS PLAYERS AND TEAMS IN CHINA  
IN %

### TOP ESPORTS PLAYERS



<b>1</b>	Jian "Uzi" Zi-Hao <sup>1</sup>	<b>13</b>
<b>2</b>	Lee "Faker" Sang-hyeok <sup>1</sup>	<b>10</b>
<b>3</b>	Liu "mlxg" Shi-yu <sup>1</sup>	<b>10</b>

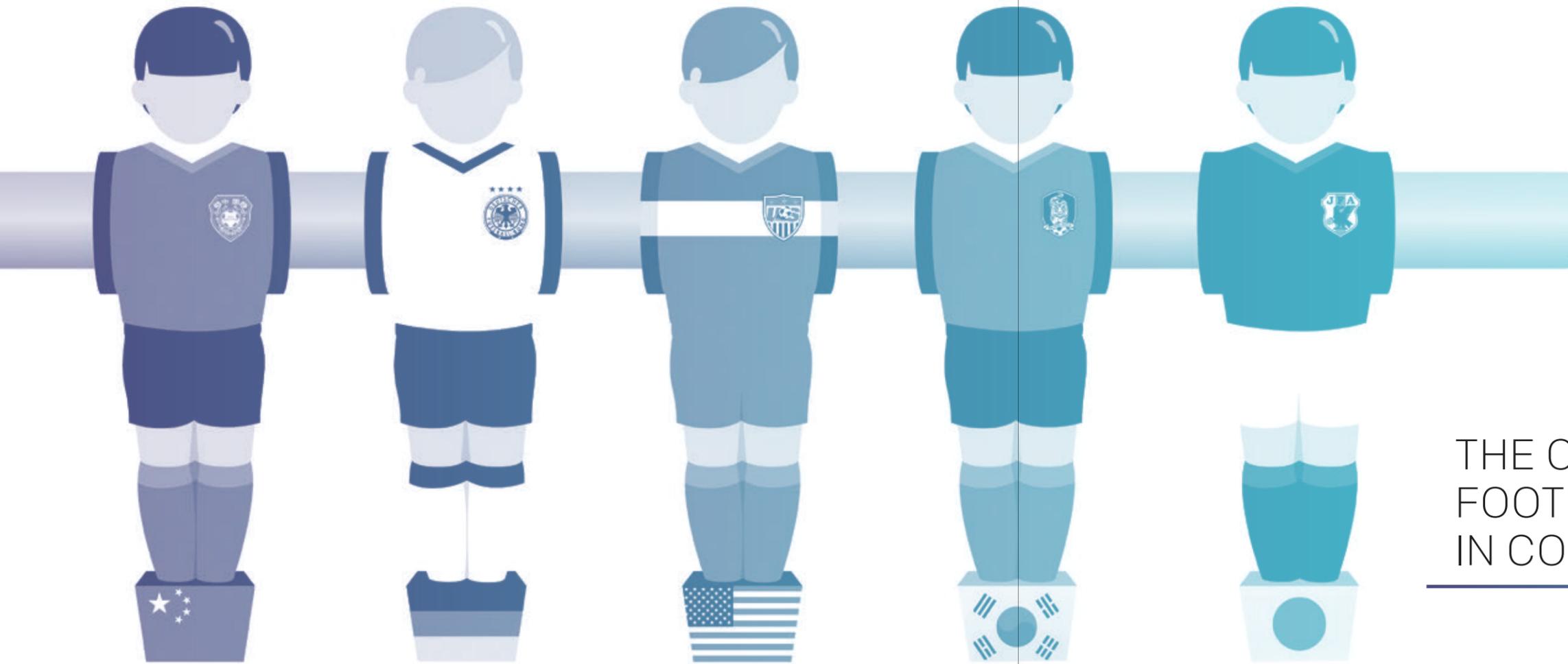
### TOP ESPORTS TEAMS



<b>1</b>	Edward Gaming <sup>1</sup>	<b>17</b>
<b>2</b>	Invictus Gaming <sup>1,2,3</sup>	<b>14</b>
<b>3</b>	Oh My God <sup>1</sup> / Star Horn Royal Club <sup>1</sup>	<b>14</b>

<sup>1</sup> LEAGUE OF LEGENDS    <sup>2</sup> DOTA 2    <sup>3</sup> STARCRAFT II





THE CHINESE  
FOOTBALL CONSUMER  
IN COMPARISON

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# COMPARED TO OTHER FOOTBALL MARKETS, THE CHINESE MARKET OFFERS HUGE GROWTH POTENTIAL IN FOOTBALL CONSUMPTION, PRACTICE AND SPENDING

**ANALYZING COMMONALITIES AND DIFFERENCES BETWEEN CHINA, GERMANY, THE UNITED STATES, SOUTH KOREA, AND JAPAN THE CHINESE FOOTBALL MARKET REVEALS UNIQUE CHARACTERISTICS ALONG TEN DIMENSIONS. THE CHINESE FOOTBALL CONSUMER STILL WATCHES, PLAYS, AND SPENDS CONSIDERABLY LESS THAN FOOTBALL CONSUMERS IN THE OTHER MARKETS.**

FIG. 3.1  
CHINESE FOOTBALL CONSUMERS IN COMPARISON

## 1 GENDER

The Chinese subsample reveals the largest gender gap in favor of male football consumers. In contrast, although the difference is not statistically significant, the German subsample reveals the highest share of female football consumers.

MORE OFTEN MALE 

## 2 AGE

Football consumers in football markets of China and the USA tend, on average, to be slightly younger than football fans in more advanced football markets such as in Germany and in Japan. 46% and 59% of the football consumers in China and the USA are 34 years old or younger. In contrast, in our German sample, only 37% of the football consumers are 34 years old or younger.

YOUNGER 

## 3 EDUCATION AND INCOME

In terms of education and income, the Chinese football consumer is comparable to the other international markets in the sample. Interestingly, in the USA, 63% of the football consumers belong to a high-income class – the highest percentage in our sample.

COMPARABLE INCOME & EDUCATION 

## 4 FOOTBALL CONSUMPTION

At about three hours, Chinese football consumers reveal the lowest average in our sample. They watch significantly less football than, for example, the German football

consumer (M = 4.41, SD = 4.41). However, considering the total amount of weekly sport consumption in China (M = 6.71, SD = 7.85) and Germany (M = 6.65, SD = 6.68), the football consumer behavior does not differ significantly from each other.

LOWER FOOTBALL CONSUMPTION 

## 5 FOOTBALL PRACTICE

Chinese football consumers play significantly less football than their peers in all other markets except Japan. Interestingly, a large share of US football consumers, almost every second, plays football themselves on a weekly basis. This is the highest ratio in our sample – even higher than the Germans.

LOWER FOOTBALL PRACTICE 

## 6 SPENDING

Chinese football consumers spend significantly less money on sport consumption compared to the other four markets investigated. They have the lowest average in our sample. Each German football consumer, in contrast, currently spends €177.52 per year – almost 12 times more than Chinese football consumers do. Interestingly, in all survey countries except China (over 50% spend on merchandise), spending on tickets makes up the largest category.

LOWER SPENDING 

## 7 MEDIA USAGE

In terms of using social media to follow favorite sports, the Chinese are comparable to German football consumers (44% and 43%). Interestingly, however, Chinese football consumers primarily follow sport stars on social media, whereas German

football consumers read sport news on social media foremost. The highest social media affinity for sports content is held by US football consumers. 80% use social media channels to seek sports-related information.

STAR FOCUS ON SOCIAL MEDIA 

## 8 ESPORTS INTEREST

Compared to the most advanced esports markets such as South Korea and the USA, where 80% and 86% of the football consumers are at least slightly interested in esports, the Chinese football consumer base with an interest in esports (42%) still offers great growth opportunities.

UNTAPPED GROWTH POTENTIAL IN ESPORTS 

## 9 ESPORTS CONSUMPTION AND PRACTICE

With regard to esports consumption and practice, Chinese football consumers are comparable to the other markets in our sample, with the exception of US football consumers, who, on average, watch and play significantly more esports per week. As expected, FIFA 16 is the favorite esports game of football consumers in all markets except China, where only 3% of the football consumers named FIFA 16 their favorite esports title.

STILL LITTLE INTEREST IN FIFA 16 

## 10 ESPORTS STREAMING

Chinese consumers use their domestic streaming platforms such as Youku and Douyu. Accordingly, the most famous streaming platforms in the other esports markets such as YouTube (incl. YouTube Gaming) and Twitch do not play a role in China.

OWN DOMESTIC STREAMING PLATFORMS 

## MOTIVES FOR WATCHING FOOTBALL IN COMPARISON

The CSM survey results (see Fig. 3.2) show that experiencing drama is among the most decisive drivers for watching football in all countries investigated, including China. Learning more about the game primarily accounts for football consumption in football markets that tend to be developing. Thus, especially in China and the USA, “knowledge acquisition” plays an important role when watching football. Other factors such as the skill of the players and

the possibility of escaping daily routine are likewise prominent among the investigated countries.

## FAVORITE PLAYERS, TEAMS, AND ROLE MODELS IN COMPARISON

In contrast to China, football consumers in established markets such as Germany tend to support and identify with their favorite team. In addition, football consumers in those comparatively estab-

lished football leagues have a balanced ratio between having a favorite player and following a favorite team. The opposite holds true for countries with football markets that tend to be developing such as in China. Here, almost 50% of the football consumers selected a favorite player, but only 32% named a favorite football team.

This is the lowest ratio in our sample next to the USA. In contrast, 50% of the German football consumers named a favorite team. In all other investigated countries, football consumers tend to follow a favorite player rather than a favorite team (see Fig. 3.3).

FIG. 3.2  
MOTIVES FOR WATCHING FOOTBALL IN COMPARISON



FIG. 3.3  
FOOTBALL CONSUMERS WITH A FAVORITE PLAYER / FAVORITE TEAM IN %

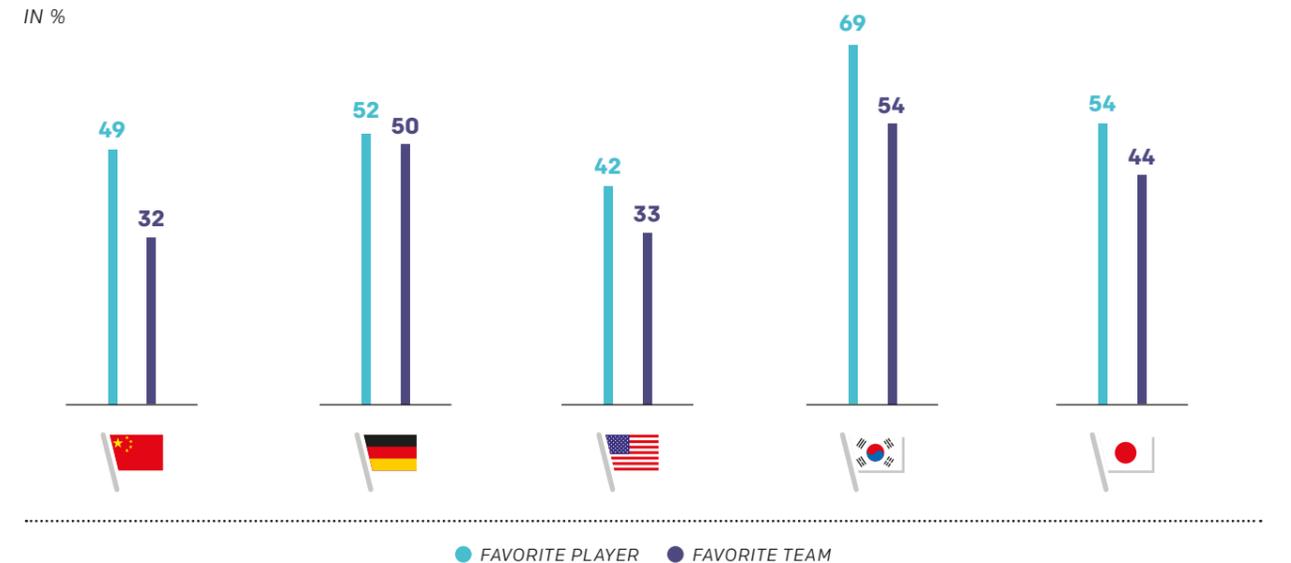
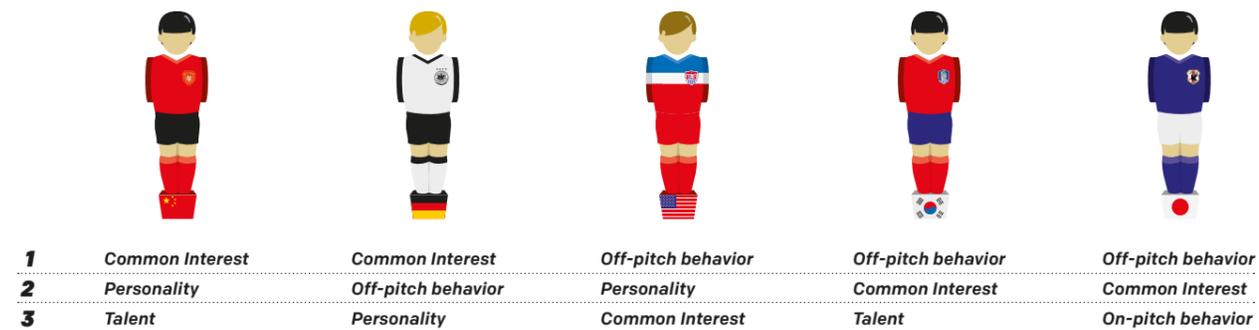


FIG. 3.4  
SIGNIFICANT CHARACTERISTICS FOR PERCEIVING THE FAVORITE PLAYER AS A ROLE MODEL



In contrast to the Chinese sport consumer, the key driver for a favorite player to become a role model in all other countries investigated is, besides common interest, the player's behavior off the pitch. This includes showing social engagement and following a glamorous and spectacular lifestyle. The personality of the player, the key factor for the Chinese sport consumer, is also statistically significant in Germany and the USA. The talent of the players (South Korea) and the players' behavior on the pitch, referring to strong commitment and service to the team (Japan), are especially important to football consumers in other markets in our sample (see Fig. 3.4).

As expected, Lionel Messi and Cristiano Ronaldo are the global superstars in the minds of our survey respondents (see Fig. 3.5). Both superstars are ranked among the top three favorite football players in four out of five countries (excluding Germany) in our sample. In countries with somewhat more developed football leagues, such as Germany and Japan, some national football stars, e.g., Shinji Kagawa and Thomas Müller, are more popular than the two global idols.

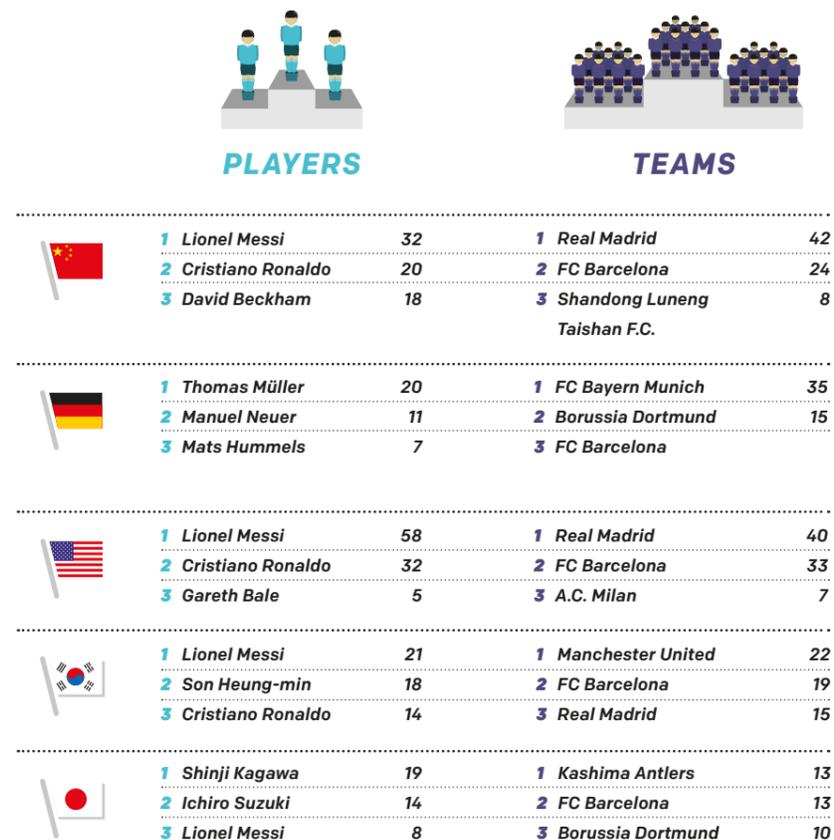
Our data show that football clubs employing global superstars have an exceptional appeal to the international fan community. Real Madrid and FC Barcelona from Spain's La Liga occupy a leading role in all countries except Germany – which is

dominated by German football brands FC Bayern Munich and Borussia Dortmund. The pull effect of employing internationally recognized football stars also becomes visible in Japan. Here, Japanese player Shinji Kagawa ranks first while his club, Germany's Borussia Dortmund, places 3rd among Japanese's favorite teams.

### ESPORTS CONSUMERS IN COMPARISON

Whereas South Korea and the USA are the most advanced in esports (61% and 50% are at least slightly interested in esports), the sheer size of the Chinese esports mar-

FIG. 3.5  
TOP 3 FOOTBALL PLAYERS AND TEAMS PER COUNTRY IN %

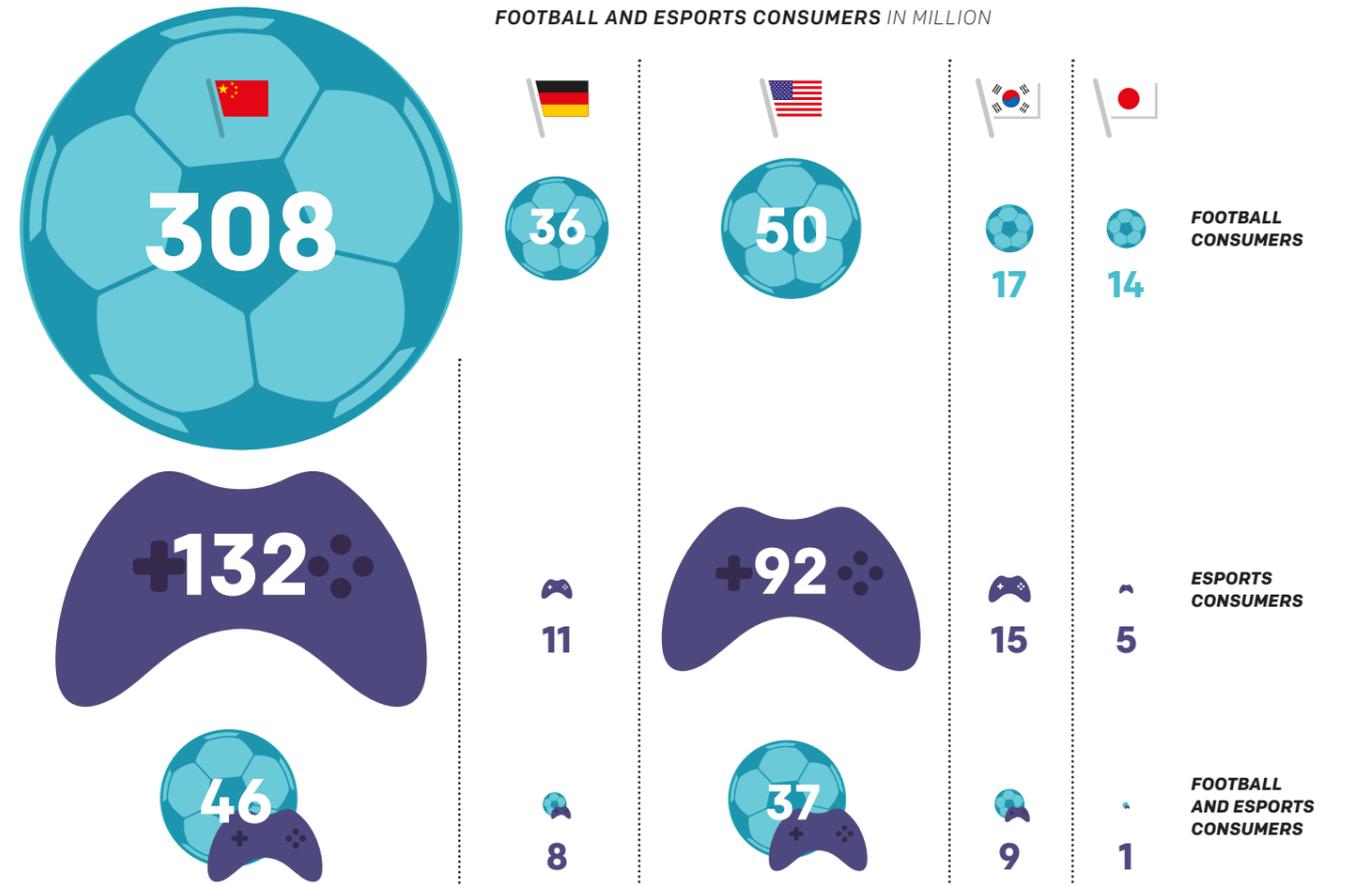


ket is astonishing. In China, 132 million people watch esports at least once a week. With 46 million Chinese watching football and esports on a weekly basis, football consumers are particularly attracted by esports (see Fig. 3.6). Overall, 60% of the football consumers in the survey state an interest in esports – 20% more than

among the full sample. Similar to China, in the other countries in our sample the market for favorite esports players is largely scattered and true esports stars are rare. Interestingly, the Chinese esports consumers have the highest share of respondents who named their favorite esports players (33%) and teams (30%) – and not

South Korea, the motherland of esports, which yielded one of the international superstars in esports – League of Legends professional Lee "Faker" Sang-hyeok. Although esports shares a global online community, in China, the USA, and South Korea, the number one esports team is based locally.

FIG. 3.6  
FOOTBALL AND ESPORTS CONSUMERS IN MILLION



### ELECTRONIC SPORTS

Electronic sports (esports; e.g., League of Legends, Counter-Strike: Global Offensive, Dota 2, FIFA 2016, Hearthstone, and Overwatch) refers to competitive gaming, organized in leagues, events and channels, or tournaments. It is set in an ecosystem that is made up of game publishers, teams, events, leagues, and channels. The industry is on a tremendous growth path: In 2019 the global esports market will be worth US\$ 1 billion. At this time, approximately 427 million people will at least occasionally consume esports

(Newzoo, 2016). By then, most esports consumers will live in China and the USA. As such, the Chinese esports market is years away from approaching market saturation. Accordingly, interested in the internationalization of their audience, leading football clubs from around the world (e.g., Beşiktaş Istanbul, FC Schalke 04, Manchester City F.C., Santos FC, Sporting Lissabon, VfL Wolfsburg, West Ham United F.C., and Valencia CF) have started moving into esports.



## RECOMMENDATIONS AND OUTLOOK

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## HOW TO BE SUCCESSFUL IN THE CHINESE FOOTBALL MARKET

### PROVIDE A MOBILE AND IMMERSIVE FOOTBALL EXPERIENCE INCLUDING DRAMA, EXCITEMENT, AND KNOWLEDGE TO ENGAGE FUTURE FANS IN CHINA

First, Chinese football needs to create products that are tailored to the motives of the Chinese football consumer by delivering drama and excitement. Drama can only be delivered from a Chinese Super League with a healthy competitive balance. Excitement might be warranted by the influx of foreign players strengthening the overall level of competition. Only with high-quality game play will the Chinese Super League attract both local fans and foreign football spectators. Our survey results showed that Chinese consumers thirst for specific information about football rules, playing strategies and tactics, teams, and players, creating relevant touch points with existing and new football fans.

Since 90% of Chinese Internet users are mobile Internet users (CNNIC, 2015), addressing the digital adeptness of the Chinese fan and coping with the pace of innovation and the quality of the mobile experience in China is crucial for successfully reaching out to the Chinese football fan. Mobile and scalable digital solutions that offer a seamless digital omni-channel experience to the fan are pivotal in a territorial state like China. We found that 56% of the Chinese football consumers think that in the next 12 months virtual reality (VR) will become relevant for them in sports – with 40% even thinking about buying a device in the next year. VR bars where fans can test and experience the exciting digital worlds are popping up in Shanghai and Peking – a great opportunity to bring a football game close to the fans. A virtual fan experience, including replicas of a team's locker room, training sessions, fitness exercises, etc., which are guided by holograms of football champions and

re-live the deciding goal in the World Cup, could set the spark for children and adults to engage in football. In addition, theme parks are currently booming in China, and football-themed fun parks are a great chance to let the Chinese submerge themselves in the world of football. Here especially digital solutions that offer fans an immersive experience could make the difference in bringing young Chinese on the football pitch.

An interested and educated football audience sets the breeding ground for making the Chinese football market even more attractive for foreign football clubs. Paired efforts from local (government) organizations and induced knowledge spillovers from football clubs in established markets are, however, indispensable. Opportunities for knowledge transfers from European football clubs and associations to China are manifold. The support of grassroots initiatives such as Borussia Dortmund's recently held soccer school in Jinshui aim at improving the competitive base in China.

### FOCUS SOCIAL MEDIA COMMUNICATION ON STARS THAT FULFILL ROLE-MODEL CRITERIA

In China, football consumers have a stronger identification with their favorite player than with their favorite team. Accordingly, winning football fans in China requires strong brand ambassadors with celebrity status that bring a football club's brand and values close to the consumer base. Although global superstars from European leagues are among the Chinese's favorite football players, the demand for domestic Chinese players is rising.

A player's influence on fans is strongest when he is perceived as a role model. Accordingly, it is important to pick the right players for each target segment (e.g., fe-

males, youngsters) to achieve best possible market penetration. For the Chinese sport fan, favorite players that exhibit an appealing personality, including having a cool and charismatic manner, being likeable and personable, and having a down-to-earth attitude, qualify as a role model. FC Bayern Munich recognized this early on in their quest for the Chinese fan. The club systematically promoted Thomas Müller during the FC Bayern China tour and on their social media channels to develop a FC Bayern superstar for the Chinese market. In particular Müller's offbeat humor, charismatic personality, personable manner, and down-to-earth behavior appeal to the Chinese fans. The increasing number of Chinese female football fans are especially attracted to such personalized social media content. They present a rapidly growing target group in Chinese football with a tendency to impulse buying and a strong affinity for merchandise, and thus offer attractive new revenue potential for clubs.

The importance of brand equity of footballers is growing even more rapidly in today's age of social media platforms. As outlined before, Chinese football fans primarily follow stars when using social media. They are not just passive consumers, but very keen on expressing their opinion by sharing, liking, and commenting. By actively involving the fans, football clubs show fans that they value their opinion – an important criterion to achieve fan loyalty. Video content is key, and platforms such as Youku and Weipai offer a great chance for football clubs to leverage personal insights into the life of the players with, for instance, home stories. Entering China means capitalizing on Chinese social media platforms like Wechat (China's WhatsApp with much more extended functionalities), Renren (comparable to Facebook), Weibo (comparable to Twitter), Youku (comparable to YouTube), and Weipai (Instagram for videos). They not only trigger fandom, but also allow clubs to control communication and

fans to engage actively with the club and its players. Since social media networks and ecommerce platforms like Tencent (comparable to Amazon) build a complex landscape, especially for non-Chinese football clubs, and standardized key performance indicators for channel efficiency are currently still scarce, it is decisive to carefully select and adapt their presence on the different online channels to achieve best possible market penetration.

### LEVERAGE ESPORTS AND ITS STARS TO BUILD AN ACTIVE FOOTBALL FAN COMMUNITY

The worlds of esports and football have common ground in China – 46 million Chinese already watch both football and esports at least once a week. Although esports provides a promising bridge for blending the world of football and digital experiences, it is not primarily about converting esports fans into football fans. Instead, exposing the club's brand to a young, digital, and active esports community is key. For football clubs, verging into esports is a ready-made touch point to experience and learn first-hand from changing consumption patterns that are shaped by fans' connectivity and live reactions.

Electronic sport games such as EA Sports' FIFA are a gateway to educate fans about esports and bring rather traditional football fans to the world of gaming. Although, as outlined in the survey results, EA Sports' FIFA is the favorite esports game in most football markets, it still plays a minor role in China. However, with rising common interest in football and the new star players of the Chinese Super League to be included in one of the next versions of the game, EA Sports' FIFA offers large growth potential in China. In Europe, first movers such as VfL Wolfsburg, West Ham United, Valencia, etc. have already signed professional FIFA players that represent the club in national and international virtual tournaments.

Investing into non-sports games such as China's favorite League of Legends game also provides an interesting business case for European and Chinese football clubs. Prize money at global esports competitions amounts to several million euros and, coupled with streaming of practice and game sessions, provides viable refinancing opportunities for the clubs. Football clubs incorporate the prerequisites to excel in the world of esports, including, amongst others, the acquisition of sponsors, the organization of events, and ticketing, as well as the distribution of sport-specific online and offline content. Globally,

FC Schalke 04 was the first professional football club to acquire a professional League of Legends team playing in the highest European league, EU League of Legends Championship Series, as part of a strategic business expansion leveraging already existing skills. Further investment opportunities are contained within platforms and technologies to service esports offerings.

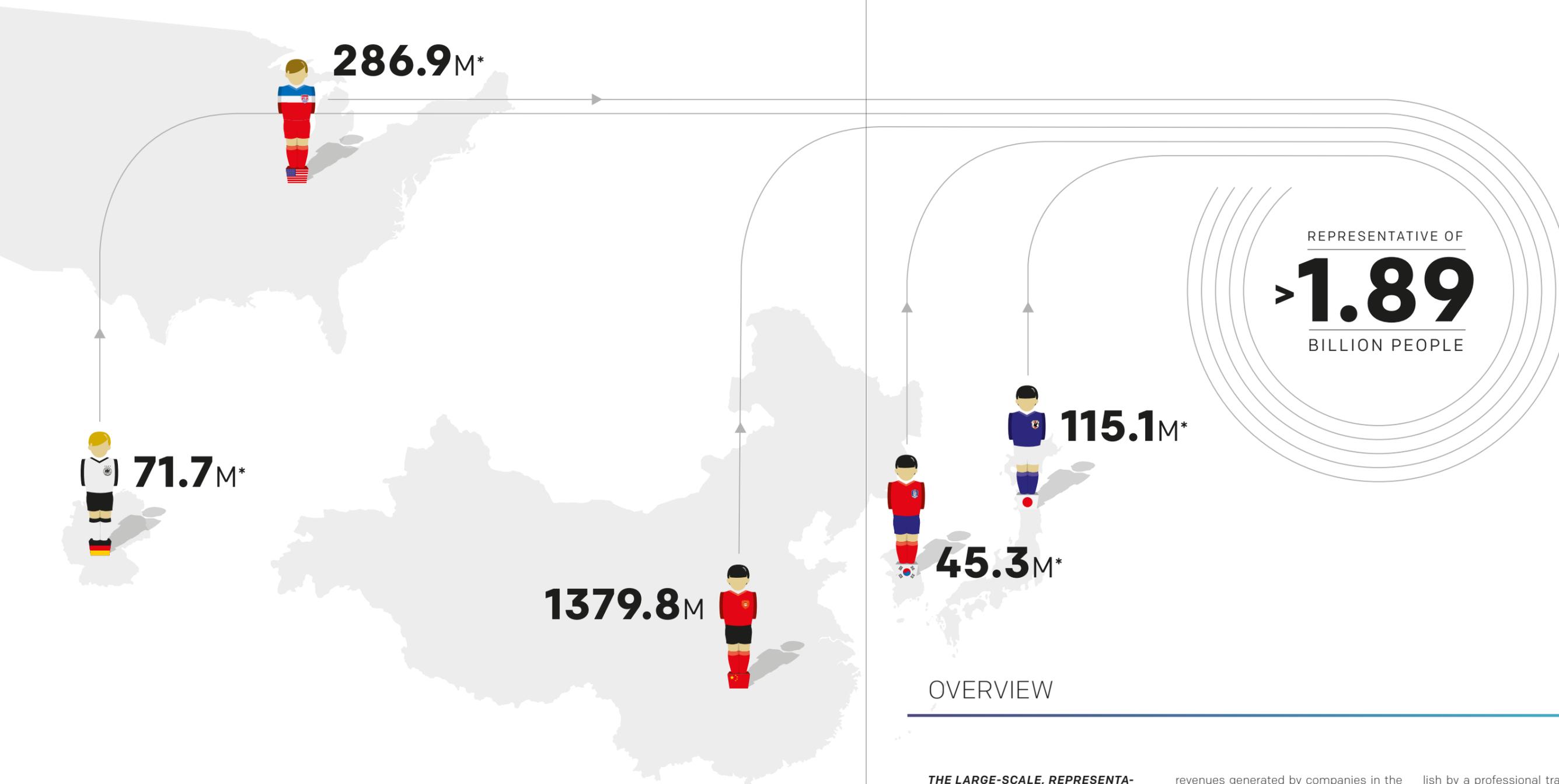
Fueled by a network-based community, the esports scene puts strong emphasis on authenticity and rising talent from within the audience. Here, the use of esports stars as influencers and promoters of non-endemic brands like football clubs can be helpful in establishing credibility in the esports community. Although the market for esports stars is still dispersed in China, esports players as brand ambassadors for football clubs are a promising future asset. Given the very international esports rosters, high player turnovers, and hardly developed talent systems, chances for foreign football clubs to find a right (Asian) brand ambassador are very promising.





## RESEARCH DESIGN AND METHODOLOGY

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## OVERVIEW

**THE LARGE-SCALE, REPRESENTATIVE CSM SURVEY WAS CONDUCTED IN APRIL/MAY 2016 IN CHINA (CHN), GERMANY (GER), THE UNITED STATES OF AMERICA (USA), SOUTH KOREA (SKO), AND JAPAN (JPN).**

These countries were selected based on global game revenues estimated for 2016 per country in order to ensure, besides sport affinity, sufficient esports penetration in the investigated countries. The above-mentioned countries occupy the first five positions with regard to annual estimated esports revenues in 2016. Revenue estimates include consumer

revenues generated by companies in the global games industry and exclude hardware sales, tax, business-to-business services, and online gambling and betting revenues (Newzoo, 2016).

The CSM survey questionnaire contained 35 pre-tested questions with an emphasis on sport consumer behavior, including respondents' motives for watching sports/esports, choosing a particular role model, and using social media. Using a standard forward-backward translation procedure, the German language version of the questionnaire was translated into Mandarin, Japanese, Korean, and (American) Eng-

lish by a professional translation agency. The survey was then administered online through Nielsen Sports (Cologne, Germany) and took between 15 and 20 minutes to complete. In China, however, face-to-face interviews were conducted in order to account for a comparatively lower online population and potentially distorted response behavior in online polls.

In addition, we further used qualitative data generated by interviews with regional experts to collect anecdotal evidence and validate empirical data.

# SAMPLE STRUCTURE AND REPRESENTATIVENESS

**OVERALL, 5,000 PARTICIPANTS COMPLETED THE CSM SURVEY QUESTIONNAIRE. RESPONDENTS IN GER, USA, SKO, AND JPN WERE REPRESENTATIVE OF THE RESPECTIVE COUNTRY'S ONLINE POPULATION (N = 1,000) IN TERMS OF AGE, GENDER, AND GEOGRAPHIC LOCATION (INTERNET WORLD STATS, 2016).**

Due to the use of face-to-face interviews in China, respondents in China, however, were representative of the country's total (rather than the country's online) population (Worldometers, 2016).

On average, survey respondents were 41 years old (M = 41.29, SD = 13.17), with age ranging between 16 and 69. Further, the final sample consisted of slightly more male (50.50%) than female (49.50%) respondents. The vast majority of respondents were citizens of the respective country (99.32%) and either in a relationship (11.86%) or married (55.60%).

## DESCRIPTION OF KEY VARIABLES

We first collected data on the individuals' favorite sport to watch. More specifically, respondents were able to answer the question "What is your favorite sport to watch?" by choosing from a comprehensive list of 38 favorite spectator sports (Nielsen Sports), including football. Multiple choices were prohibited and an open field was provided for the respondents to include an additional favorite sport, if necessary.

### SPORT CONSUMPTION

In order to explore consumption patterns, respondents were asked to indicate how many hours per week, on average, they would spend watching each of the sports mentioned earlier.

In order to better characterize the football consumer, we further collected data on sport activity ("How many hours do you, on average, play/undertake the following sport per week?"), stadium attendance ("How often did you attend games/competitions of your favorite sport during the last 12 months?"), and preferred forms of consuming football.

Finally, in those cases where respondents did not choose football as their favorite sport, survey participants were asked if they were interested in watching football and, if this was not the case, why they were not interested. With regard to the latter question, respondents chose from the following seven answers: "There is not sufficient complexity in the game," "I didn't grow up with football," "It's too mainstream," "My friends (and people around me) don't watch football," "I don't understand the rules," "It's not fast enough," and "I don't like the atmosphere at football games." Multiple choices were permitted and an additional open text field was provided for the respondents to include further reasons, if necessary.

### SPORT CONSUMPTION MOTIVES

Sport consumer behavior research has identified several motives, namely aesthetics, drama, escapism, knowledge acquisition, physical attraction, physical skills of players, social interaction, and vicarious achievement, for watching a specific sport (Funk et al., 2002; Sloan, 1989; Trail & James, 2001; Trail et al., 2003; Wann, 1995). We assessed the consumers' consumption motives by employing the so-called Motivation Scale for Sport Consumption (MSSC; Trail & James, 2001). Consistently updated, the MSSC has been tested extensively in explaining motives for consuming various sports, among others in Japan and South Korea (Won & Kitamura, 2007) or the USA (James & Ross, 2004). A 7-point Likert-type scale was used to assess a set of eight different dimensions consisting of 24 items.

### IDENTIFICATION WITH FAVORITE ATHLETE/TEAM

According to social identity theory (cf. Tajfel, 1974, 1978, 1982; Tajfel & Turner, 1985; Turner, 1975), an individual's self-concept not only consists of a personal identity containing idiosyncratic characteristics, but also of a social identity derived from the affiliation with social groups such as age cohort, gender, or organizational membership (Mael and Ashforth, 1992).

In this context, organizational identification (OI) refers to the degree to which an individual affiliates him- or herself with a particular organization, for example, a professional football team. It is worth noting that the concept of OI can be applied not only to internal, but also to external stakeholders and, therefore, allows otherwise unassociated individuals such as football spectators or fans to indirectly participate in organizational achievements (Katz and Kahn, 1978; Mael and Ashforth, 1992). Typically, the more an individual identifies with a particular group, the more s/he experiences the successes/failures of the respective group as her/his own (Foote, 1951; Tolman, 1943).

Our identification measure is based on a well-established reflective construct, which comprises an average of six items measuring the extent to which an individual identifies with either his or her favorite player, team or, in some cases, both (see e.g. Bhattacharya et al., 1995; Bergmann et al., 2016; Hoegel et al., 2014a; Ngan et al., 2011; Mael & Ashforth, 1992). All six items reflect statements such as "If someone criticized my favorite team it would feel like a personal insult" or "I am very interested in what others think about my favorite team". All statements had to be assessed on a 5-point Likert-type scale. Noticeably, for our five subsamples, the construct is sufficiently reliable with a Cronbach's alpha of 0.93/0.89 (CHN), 0.92/0.93 (GER), 0.94/0.92 (JAP), 0.94/0.94 (SKO), and 0.88/0.85 (USA) for team and star identification, respectively.

### ATHLETES AS ROLE MODELS

Similar to other celebrities, football players encompass role model qualities that qualify them as socialization agents (Bush et al., 2004) whose behavior can have a substantial impact on football consumer's beliefs and behaviors.

Accordingly, we examined which characteristics would make someone's favorite athlete his or her personal role model. More specifically, having indicated a favorite athlete, respondents were first able to rate the extent to which they would agree/disagree with a set of 20 items, e.g., coolness, exceptional talent, good-looks, likeability, and performance, as the basis for their initial decision using a 5-point Likert-type scale.

In our analysis, however, we used five different dimensions, namely on-pitch behavior, off-pitch behavior, personality, similarity, and talent, rather than the individual items. For example, the personality scale was characterized by the five items charismatic ("has a charismatic appeal"), cool ("has a cool and relaxed manner"), likeable ("has a likeable manner"), down-to-earth ("is down-to-earth and approachable"), and good-looking ("is good-looking").

We explored the potential role of these five dimensions in shaping an athlete's role model suitability, using ordinary least squares (OLS) with White (1980) standard errors robust to heteroscedasticity. In addition to our key independent variables, we further introduced a series of control variables. The subsequent results turned out to be robust to the inclusion of control variables such as the participants' age, gender, relationship status, and the level of education and income.

Further, as an additional robustness test, participants were asked whether they agree/disagree with additional statements such as "My favorite player provides a good model for me to follow," "My favorite player shows the behavior that I try to imitate," or "My favorite player is a good role model for others." All these statements had to be assessed using a 5-point Likert-type scale, too.

### SOCIO-DEMOGRAPHIC INFORMATION

Our survey instrument includes a long list of socio-demographic control variables including, among others, survey respondents' age (in years), gender, and citizenship. In fact, these demographic factors are regularly associated with shaping the

demand for professional sporting products such as basketball or football games (e.g., Schreyer et al., 2016). Further, in order to control for country-specific differences in education and household net income, the questions on both respondents' level of education and the disposable household net income were adapted to each country. Categories for household net income accounted for differences in currencies, e.g., Chinese yuan vs. euro vs. US dollar, and income groups. In order to allow cross-country comparisons, both educational and income level were grouped into three categories, i.e., low, medium, and high, to properly reflect the distribution within a specific country.

### FURTHER VARIABLES

In order to characterize the international football consumer further, we collected data on individual sport media consumption (e.g., usage of second screens and social media for sport consumption), spending behavior, and opinions on innovative future technologies such as virtual reality (VR). With regard to the latter aspect, respondents had to assess whether current trends such as augmented reality, holographic replays, VR, and wearables would become relevant for them.

## DETAILS ON KEY ANALYSES

### CHARACTERIZATION OF CHINESE, GERMAN, US, SOUTH KOREAN, AND JAPANESE FOOTBALL CONSUMERS



#### THE CHINESE FOOTBALL CONSUMER

Summarized in table 4.1, Chinese football consumers who watch football at least once a week were, on average, 40 years old (M = 39.62, SD = 13.71) and composed of a significantly greater percentage of males (73%) than females (27%). Compared to

the football consumers in Germany, Japan, South Korea, and the USA, Chinese football consumers were the group with the highest relative share of male respondents. In terms of education and income, the Chinese football consumer was most likely to be part of the rapidly growing Chinese middle class.

Although only 7% of all Chinese football consumers stated they played football themselves, by far the lowest relative share in all five subsamples, their football media consumption was, at 2.9 hours/week (M = 2.87, SD = 3.47) on average, already on a comparable level with Japanese football

consumers (M = 2.94, SD = 3.73). In relative terms, Chinese football consumers reported spending about 44% of their total sport consumption time (M = 6.71, SD = 7.85) on football, i.e., the highest share in all five countries except for Germany (66%). Interestingly, for Chinese football spectators, one important motive for watching the game was the acquisition of knowledge (see page 15). Chinese football consumers reported that they preferred watching a football game either via TV (75%) or online streaming (11%), rather than experiencing it in the stadium (12%).

Obviously, some Chinese football consumers also use social media platforms to keep up to date with their favorite sport (44%), primarily in order to follow sport stars rather than teams. While the use of Western social media platforms such as Facebook, Instagram, or Twitter is quasi non-existent, Chinese football consumers are best found on Wechat (27%), Weibo (19%), and Renren (14%).

Finally, with regard to electronic sport or esports, Chinese football consumers were best understood as being somewhat interested. More precisely, 42% of all Chinese football consumers were at least slightly interested in esports, with roughly 15% of them watching esports at least once a week for, on average, 7.4 hours (M = 7.36, SD = 14.48). Interestingly, the (very few) Chinese football consumers watching esports reported to prefer a multiplayer online battle arena (MOBA) game such as League of Legends (LOL; 55%) rather than a sport simulation such as FIFA 16 (3%).



### THE GERMAN FOOTBALL CONSUMER

As can be observed from table 4.1, German football consumers who watch football at least once a week were, on average, 42 years old (M = 41.52, SD = 13.45) and composed of a significantly greater percentage of males (64%) than females (36%). However, compared to those football consumers in China, Japan, South Korea, and the USA, German football consumers were the group with the highest relative share of female respondents. In terms of income, German football consumers are generally comparable to those consumers in other markets, except for the United States, where most football consumers are located in the highest income group. Almost all German football consumers are at least located in the medium education group.

Only about 20% of all German football consumers stated that they played football themselves, a relative share that is significantly higher than in China and significantly lower than in both South Korea and the USA. Their football media consumption was, on average, ca. 4.4 hours/week (M = 4.41, SD = 4.41), the second

highest value in all five countries. In relative terms, German football consumers reported spending about two-thirds of their total sport consumption time watching football (M = 6.65, SD = 6.68), the highest share in all five countries. German football consumers were specifically interested in the dramatic aspect of the game (Pawlowski, 2013; Schreyer et al., 2016) and reported that they preferred watching football via TV (50%) or online streaming (4%) or experiencing it in the stadium (38%).

Similar to the Chinese football consumers, a fair share of German football consumers reported using social media platforms to keep up to date with their favorite sport (43%), primarily to follow sport news. German football consumers are most active on Facebook (34%), YouTube (21%), and Twitter (7%).

47% of German football consumers were at least slightly interested in esports; 22% of them watch esports at least once a week for, on average, 7.3 hours (M = 7.27, SD = 8.67). Interestingly, the top three esports titles reported by German football consumers were FIFA 16 (54%), Call of Duty: Black Ops III (8%), and League of Legends (7%).



### THE US FOOTBALL CONSUMER

American football consumers were significantly younger than football consumers in China, Germany, Japan, and South Korea. On average, US consumers who watch football at least once a week were 34 years old (M = 34.36, SD = 10.09) and composed of a significantly greater percentage of males (72%) than females (28%). Interestingly, in terms of income, almost two-thirds of American football consumers (63%) were located in the highest income group, while even more were part of the highest education group (82%).

US football consumers reported not only the highest share of active football players (50%) but also the highest football media (M = 4.47, SD = 3.81) and sport consumption (M = 21.17, SD = 17.40). US football consumers were interested in the acquisition of knowledge and had the

highest relative share of consumers that reported watching football at home via online streaming (15%).

Most US football consumers reported using social media platforms to keep up to date with their favorite sport (56%), primarily via Facebook (68%), YouTube (60%), and Twitter (50%).

86% of all US football consumers were at least slightly interested in esports, with about 75% of those football consumers watching esports at least once a week for, on average, 20 hours/week (M = 20.48, SD = 23.37). The top three esports titles reported by US football consumers were FIFA 16 (45%), Call of Duty: Black Ops III (11%), and Battlefield 4 (8%).



### THE SOUTH KOREAN FOOTBALL CONSUMER

South Korean football consumers who watch football at least once a week were, on average, 41 years old (M = 41.00, SD = 13.03) and composed of a significantly greater percentage of males (65%) than females (35%). In terms of income, South Korean football consumers are comparable to consumers in China, Japan, and Germany. Interestingly, three-quarters of all South Korean football consumers are located in the highest education group – the second highest value among all five markets investigated.

Unlike football consumers in China, Germany, and Japan, South Korean football consumers tend to be active on the pitch. 37% of all South Korean football consumers reported playing football themselves (M = 0.37, SD = 0.48) – the second highest relative share in all five subsamples after American football consumers. Their football media consumption amounts to, on average, 3.2 hours/week (M = 3.21, SD = 4.37) and was neither exceptionally high nor low. In relative terms, South Korean football consumers reported spending only about 30% of their total sport consumption time watching football (M = 10.61, SD = 11.87), the second lowest share among all football consumer groups. Primarily interested in the dramatic aspects of the game, South Korean football consumers reported that

they preferred watching the game at home either via TV (78%) or online streaming (6%) or experiencing it in the stadium (15%).

Interestingly, a high share of the South Korean football consumers reported using social media platforms to keep up to date with their favorite sport (57%), primarily in order to (re)watch games and highlights or follow the news. South Korean football consumers are most likely to be found on Facebook (37%), YouTube (35%), Twitter, and Instagram (both 15%).

80% of all South Korean football consumers were at least slightly interested in esports, with roughly 53% of them watching esports at least once a week for, on average 6.1 hours (M = 6.09, SD = 9.70). The top three esports titles reported by South Korean football consumers were FIFA 16 (25%), League of Legends (23%), and StarCraft II (23%).



### THE JAPANESE FOOTBALL CONSUMER

Japanese football consumers who watch football at least once a week were, on average, 45 years old (M = 45.03, SD = 11.80) and composed of a significantly greater percentage of males (67%) than females (33%).

Interestingly, compared to China, Germany, South Korea, and the USA, Japan has by far the oldest football consumer population. In terms of income, Japanese football consumers are comparable to those consumers in other markets, except for the United States, where most football consumers are part of the highest income group. Interestingly, two thirds of all Japanese football consumers were located in the highest education group.

Similar to Chinese football consumers, Japanese football consumers are not necessarily active on the pitch. 14% of all Japanese football consumers reported that they played football themselves (M = 0.14, SD = 0.35) – the second lowest relative share in all five subsamples after China. Similarly, their football media consumption was, on average, about 2.9 hours/week (M = 2.94, SD = 3.73), the second lowest value in all five countries. In relative terms, Japanese football consumers reported spending about 41% of their total sport consumption time (M = 7.24, SD = 8.51) on football, which is comparable to the Chinese subsample (43%). Unlike those football consumers in China, Germany, and the USA, Japanese football consumers reported that they are primarily interested in the skills of professional football players. Only one third of the Japanese football consumers (34%) reported using social

media platforms to keep up to date with their favorite sport. Those Japanese football consumers using social media are most likely to be found on YouTube (18%), Twitter (16%), or Facebook (11%).

46% of all Japanese football consumers were at least slightly interested in esports, with about 10% of them watching esports at least once a week for, on average, 3.5 hours (M = 3.50, SD = 3.78). The top three esports titles reported by Japanese football consumers were FIFA 16 (33%), Super Smash Bros. Wii U (17%), and Battlefield 4 (17%).

TABLE 4.1  
SUMMARY STATISTICS ON CHN, GER, USA, SKO AND JPN FOOTBALL CONSUMERS

	CHN		GER		USA		SKO		JPN	
	ALL CONSUMERS	FOOTBALL CONSUMERS								
<b>AGE</b> years	39.26	39.62	41.35	41.52	40.66	34.36	41.01	41.00	44.21	45.03
<b>MALE</b> %	51.20	73.09	50.70	64.10	49.90	71.68	50.90	64.69	49.80	67.21
<b>INCOME</b> %*										
low	31.50	24.22	24.70	18.34	31.50	17.92	17.30	14.29	40.90	35.25
medium	41.90	45.29	48.50	48.92	41.90	19.08	62.80	61.73	44.20	43.44
high	23.50	26.91	26.80	32.74	23.50	63.01	19.90	23.99	14.90	21.31
<b>EDUCATION</b> %										
low	38.10	28.70	0.60	0.39	2.50	1.16	0.50	-	1.40	0.82
medium	47.80	56.50	52.10	47.93	35.80	17.34	23.50	24.26	42.50	34.43
high	14.10	14.80	47.30	51.68	61.70	81.50	76.00	75.74	56.10	64.75

\* percentages partially do not add up to 100% due to no answers

● ALL CONSUMERS ● FOOTBALL CONSUMERS

# COUNTRY PROFILES – AT A GLANCE

## CHINA



### FAVORITE SPORTS TO WATCH IN %

1	Basketball	20.5
2	Football / soccer	17.2
3	Badminton	6.4
4	Table tennis	5.7
5	Volleyball	2.8
	I don't watch sports	29.8

### FAVORITE ESPORTS TO WATCH IN %

1	League of Legends	5.6
2	World of Warcraft	0.8
3	Cross Fire	0.8
4	CS: Global Offensive	0.6
5	Dota 2	0.5
	I don't watch esports	83.1*

## GERMANY



### FAVORITE SPORTS TO WATCH IN %

1	Football / soccer	38.2
2	Dancing	5.2
3	Motor racing	4.8
4	Athletics / track and field	3.6
5	Swimming	3.0
	I don't watch sports	17.7

### FAVORITE ESPORTS TO WATCH IN %

1	FIFA 16	9.1
2	Call of Duty: Black Ops III	1.8
3	CS: Global Offensive	1.5
4	League of Legends	1.4
5	Battlefield 4	1.2
	I don't watch esports	77.5*

## USA



### FAVORITE SPORTS TO WATCH IN %

1	American football	26.6
2	Basketball	11.2
3	Baseball	10.7
4	Football / soccer	7.6
5	Ice hockey	2.8
	I don't watch sports	19.0

### FAVORITE ESPORTS TO WATCH IN %

1	FIFA 16	12.0
2	Call of Duty: Black Ops III	5.6
3	Battlefield 4	3.8
4	Dota 2	1.9
5	League of Legends	1.7
	I don't watch esports	62.2*

## SOUTH KOREA



### FAVORITE SPORTS TO WATCH IN %

1	Baseball	38.6
2	Football / soccer	21.5
3	Golf	4.4
4	Basketball	3.0
5	Martial arts	2.5
	I don't watch sports	14.4

### FAVORITE ESPORTS TO WATCH IN %

1	StarCraft II	12.4
2	League of Legends	9.6
3	FIFA 16	9.1
4	World of Warcraft	4.0
5	CS: Global Offensive	1.2
	I don't watch esports	53.8*

## JAPAN



### FAVORITE SPORTS TO WATCH IN %

1	Baseball	18.8
2	Football / soccer	10.1
3	Volleyball	6.9
4	Figure / ice skating	6.0
5	Tennis	5.2
	I don't watch sports	26.5

### FAVORITE ESPORTS TO WATCH IN %

1	Super Smash Bros. Melee	1.9
2	Super Smash Bros. Wii U	1.7
3	FIFA 16	1.3
4	Battlefield 4	1.1
5	Call of Duty: Black Ops III	0.5
	I don't watch esports	91.6*



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