



# The Ganassa Report

## The State of European Football In East Asia 2020

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And -yes!-, we are also looking for partners and sponsors for 2021.

# Index

## INTRODUCTION



P4 - Infosummary

P5 - The Ganassa Report

P6 - Foreword to the Vietnam Report

## MEDIA



P19 - News Sources

P20 - Watching Favourite Club's Matches

## DEMOGRAPHICS



P8 - Vietnam at a Glance

P9 - Survey's Respondents

P10 - Age of Respondents



## SUPPORTING

P12 - Most Supported European Clubs

P13 - Other Favourite Clubs

P14 - Most Followed Leagues (by Club)

P15 - Reasons for Supporting a Club

P16 - Influence of Parents

P17 - Switching Club

## BEHAVIOUR



P22 - Purchasing Favourite Club's Jersey

P23 - Following Local Football

P24 - Data Story  
on how CR7's Move to Juventus Enhanced the Impact of the Bianconeri in Vietnam

## APPENDICES



P26 - Local Voices

on how Chelsea Fans Live and Prosper in Vietnam

P27 - Top 10 Comparison Tables

P28 - About Ganassa

P29 - Credits, Specifics, Disclaimer and Copyright



# Introduction

# Infosummary



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



One in four Vietnamese fans supports Manchester United



85.1%  
17 Vietnamese supporters out of 20 who support a European club also follow their National Teams



Việt Nam

More than 60% of Vietnamese fans indicated a favored player or manager as one of the main reasons to support a club  
60.5%

Borussia Dortmund is picked by only 0.7% of fans as a first choice, but rises to 10.7% as an “other favourite club” among those supporting more than one team in Vietnam.



2/5 of the Vietnamese fans who bought their favourite club’s jersey this season, opted for a cheaper, counterfeit copy  
38.8%

Among those who have switched allegiance, one Vietnamese supporter in five picked Juventus as their new favourite club  
1/5 J

# The Ganassa Report



About a year ago, in the summer of 2019, we were looking for ways to enhance the portfolio of services we offer our clients, and decided to focus upon certain research. Our task was to gain a solid grasp on the behaviour of the fans in the region where we work, East and Southeast Asia.

The first question was: "Which are the most popular clubs in each country?" We also wanted to get more information on the fans, and specifically who they are: how old they are, what jobs do they do – we wanted their full profile! Finally, we hoped to learn about their behaviour vis-a-vis their lives as supporters: how do they get informed about their favourite clubs? Do they watch every match? Have they bought an official jersey this season?

Well, it has been said that nowadays you can find anything on the internet, so we approached our search with great optimism... only to discover that basically none of the data we were looking for existed – or if it did, it was not public.

As some of us have worked for more than ten years as chief or managing editors in Asia, we decided to pull some strings and asked our influential friends in the region – top journalists, TV producers, heads of fan clubs, players etc. with the same result: we got some interesting opinions, but no hard data.



How is this possible, we wondered? We live in an age when football has finally opened its doors to data: Moneyball, Soccernomics, Soccermetrics, with plenty of online platforms capable of dissecting every element of a football match... Is it possible that nobody has taken the time to gather data on the most important people in the game – the fans?

Be that as it may, it was clear that there was only one way to get the data that we wanted. So, we rolled up our sleeves and – as we have done several times in the past – brought together a team of football brains from across Asia and started gathering information from six different countries. Beginning with Southeast Asia, our goal was to interview hundreds of people in each country, approximately half of them in the streets and the other half online.

It is not always easy to get the busy and somewhat shy Asian people to open up about their passion for football, but we quickly gained experience and after overcoming a few hiccups we cruised through the first four countries. Alas, as we started with the fifth, early in 2020, COVID-19 swept across the planet and we were forced to complete the surveys in China and Japan mostly online.

By the end of spring 2020, we had gathered over 130,000 pieces of data, provided by almost 5,500 European football clubs' fans in Vietnam, Indonesia, Singapore, Korea Rep., China and Japan.



We then organised all information into six separate reports plus a regional summary. For the most part, the data confirmed the impression that many of us who had worked in the region for several years had, but, for the first time, it gave us precise numerical details on fans tastes and behaviour. So we now finally know for a fact that Manchester United is the most beloved club in East Asia, that LaLiga's popularity has surpassed Serie A, that Asian fans love social media (but in their own language!), that many still buy counterfeit jerseys and that in the Orient as well, Borussia Dortmund is every football geek's "second favourite club".

Most interestingly perhaps, we have managed to profile reasons why fans choose or change their favourite club, the influence parents have on such

choices, and how support for a European club mixes with that for a local team and national teams. Overall, we believe we have successfully begun to define the "body and soul" of Asian fans. However, this is only the beginning. A lot of lessons were learned in the making of this research, and there are already plenty of ideas to improve it in the years to come.



We offer our work as our contribution to the ongoing discourse on football as a worldwide phenomenon. We hope that the leagues, clubs, media, sponsors, fans and football lovers around the world can make good use of the data we are willing to share with the community; and we are always open to ideas, comments and criticism that will allow us to come back with an even better report. Thanks to all who have worked on this project, and all who will read and utilise this data. But mostly, thanks to the Asian football fans, who found the time and were willing to tell us about themselves: the hope is that thanks to this research many will be able to serve them better – as they deserve.

**Cesare Polenghi, CEO**

Ganassa PTE LTD  
Higashikawa, Japan  
June 25, 2020



Cesare Polenghi is a native of Italy and resides in Japan since 1994. His career as journalist, editor and content producer has brought him all around East Asia, where he has opened over 20 football websites in ten different countries for goal.com, football-channel.jp and football-tribe.com. As a TV commentator, Cesare has appeared in over 300 shows, mostly in Japan, before kicking off his own agency, Ganassa, in 2016. He lives between Tokyo and Higashikawa, in Hokkaido, Japan.





# Foreword to the Vietnam Report

Vietnamese people love football. A huge section of the population watches or attends the national team's matches, and many follow big European competitions on their TV screens — even when games are played in the middle of the night. In fact, this survey showed that 85% of fans said they follow both a European club and domestic team, making Vietnam one of the most football-addicted countries in the region.

The English Premier League is the most beloved competition, with one out of four fans surveyed supporting Manchester United. At the turn of the century, with the increase of European football's popularity, the EPL was broadcast across Vietnam widely and free of charge. Back then, Manchester United featured a team filled with homegrown players that managed to win many titles, and as a natural result many in Vietnam embraced the Red Devils as their favourite club and began to avidly follow European football.



However, Manchester United have so far not been very active in the Vietnamese market. Instead, it is Chelsea (and also Tottenham Hotspur and the Bundesliga's Borussia Dortmund) who recently increased their popularity with a digital presence in the country. With very popular Facebook accounts in Vietnamese, these clubs have earned an edge over their competition when it comes to creating a special relationship with Vietnamese fans. Chelsea, who have also lifted trophies in recent seasons, are in fact the second

most supported club in Vietnam, while Borussia Dortmund rank third among "other favourite clubs".



Manchester City have been very active in Vietnam in recent years through activities such as a trophy tour, former player visits, video content, and a partnership with SHB Bank. Meanwhile, Arsenal played against the Vietnam national team back in 2013, and opened an academy together with local club Hoang Anh Gia Lai. However, neither of these two clubs have so far launched websites or social media channels in Vietnamese.



Academies seem to be the most popular form of partnership. In 2018, Juventus cooperated with the Binh Minh Group to open a football school in Vietnam, and "Bianconeri" legend David Trezeguet visited the country for the opening. This paved the way in 2019 for other academies associated with AC Milan and Lyon FC.

Mostly on account of still-developing infrastructure (for example, OTT providers struggled due to unreliable internet connections), Vietnam may not yet be a fully mature market. However, there are several reasons to consider this almost 100-million-people-strong country as one with huge potential for rapid development.



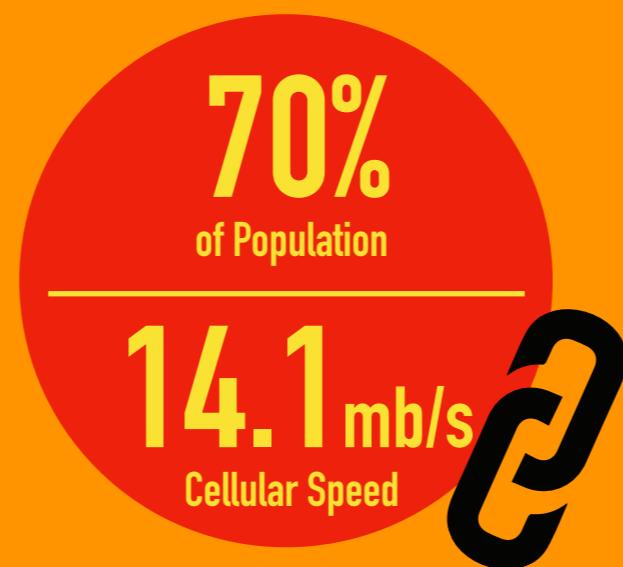
The recent regional success of the local national teams has generated a genuine enthusiasm for football, and the younger generations have completely embraced "The Game" as part of their lifestyle. With an average age of approximately 30, a growing football fandom which desires to be nurtured and limited costs, Vietnam is clearly one of the next destinations for those clubs, leagues and federations that wish to expand their influence in Asia.

CANASSA

# Demographics



# Vietnam at a Glance



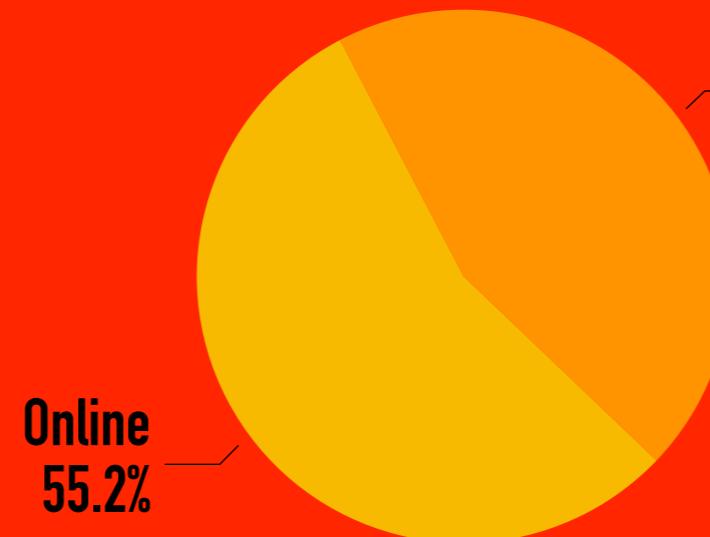
Sources: Worldometers, World Bank, International Telecommunication Union, Opensignal, IMF



# Survey's Respondents

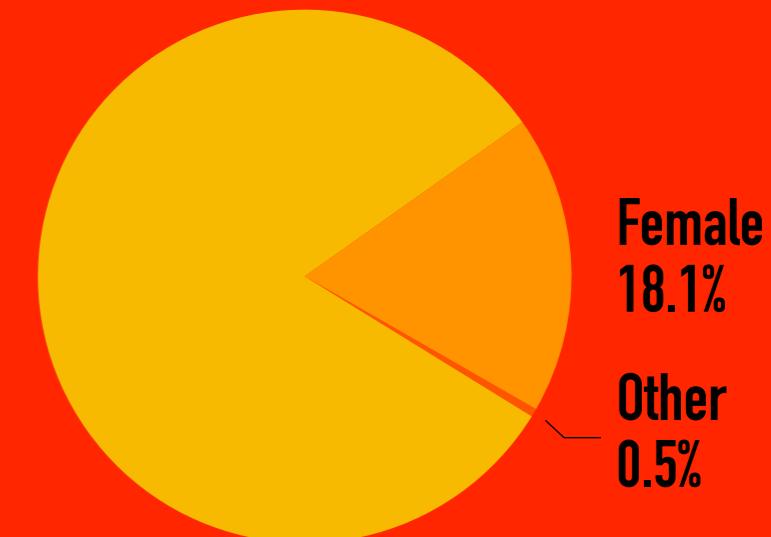


Average Age



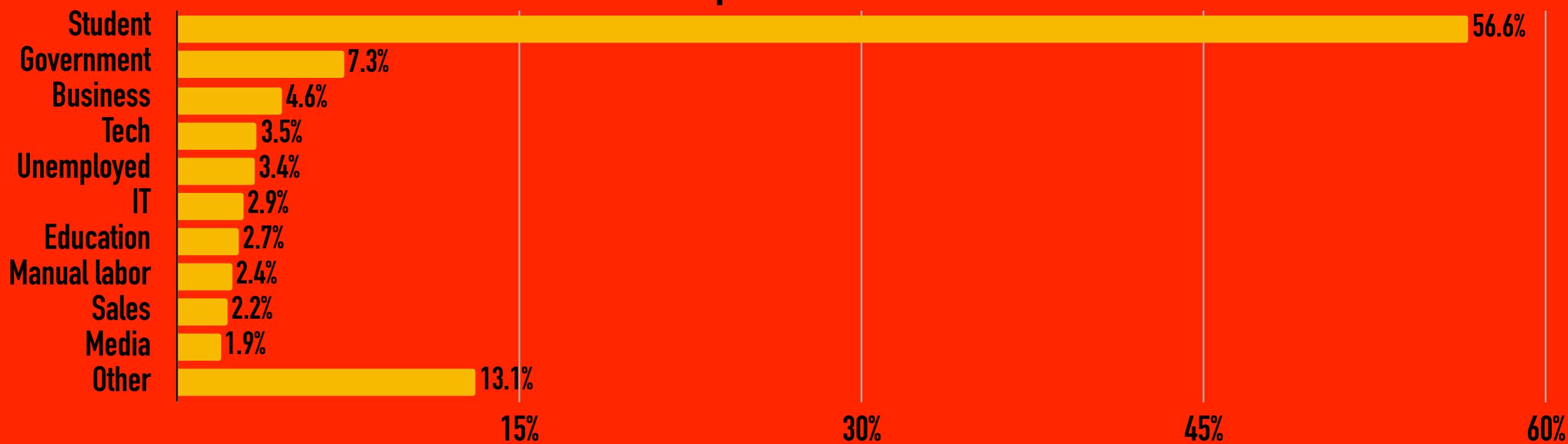
Source

Street  
44.8%  
Male  
81.4%



Gender

## Occupation

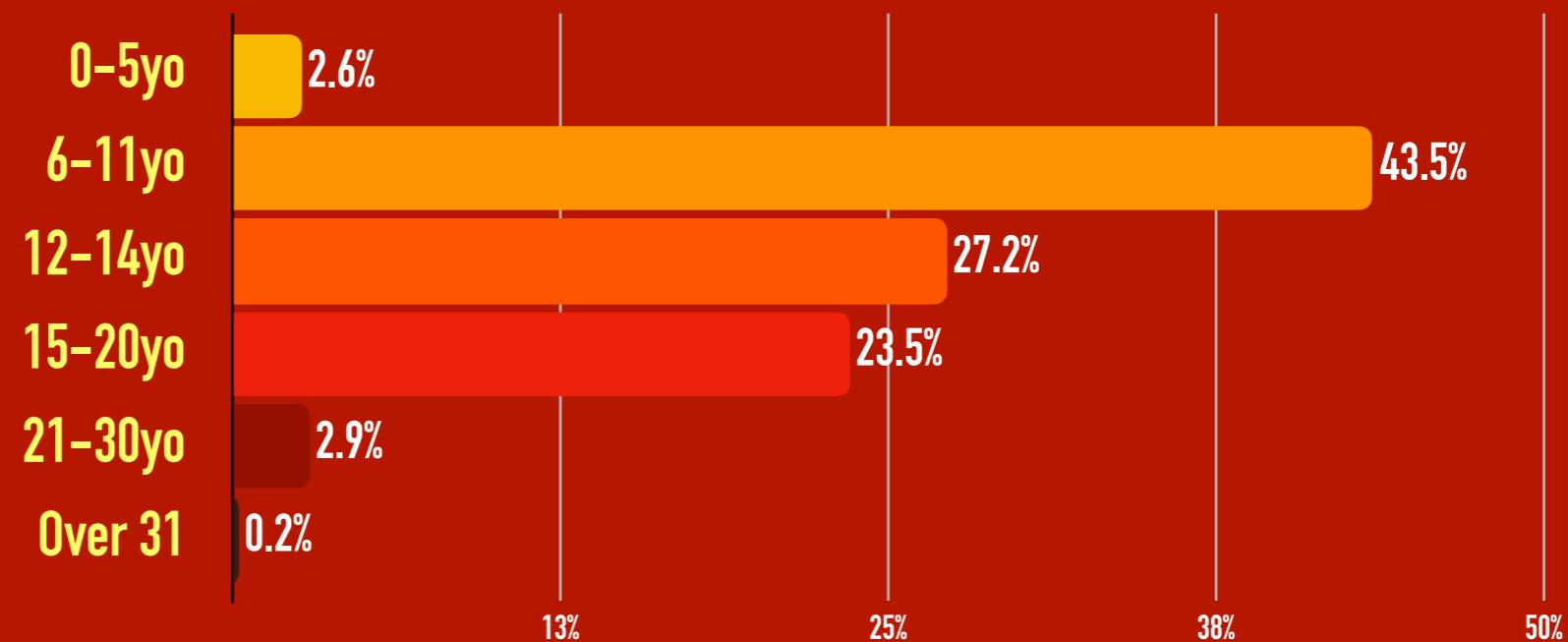




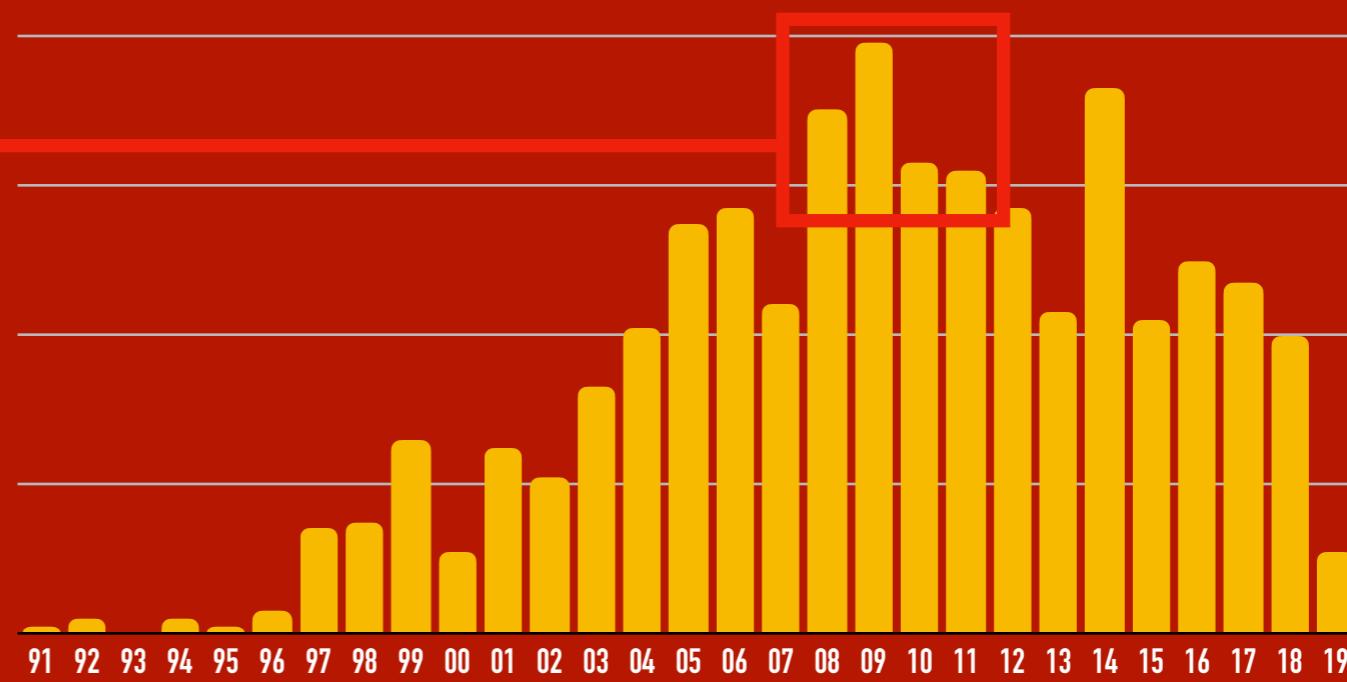
# Age of Respondents



Average age when  
became a supporter



Peak years when most  
Vietnamese fans started to follow  
a European club

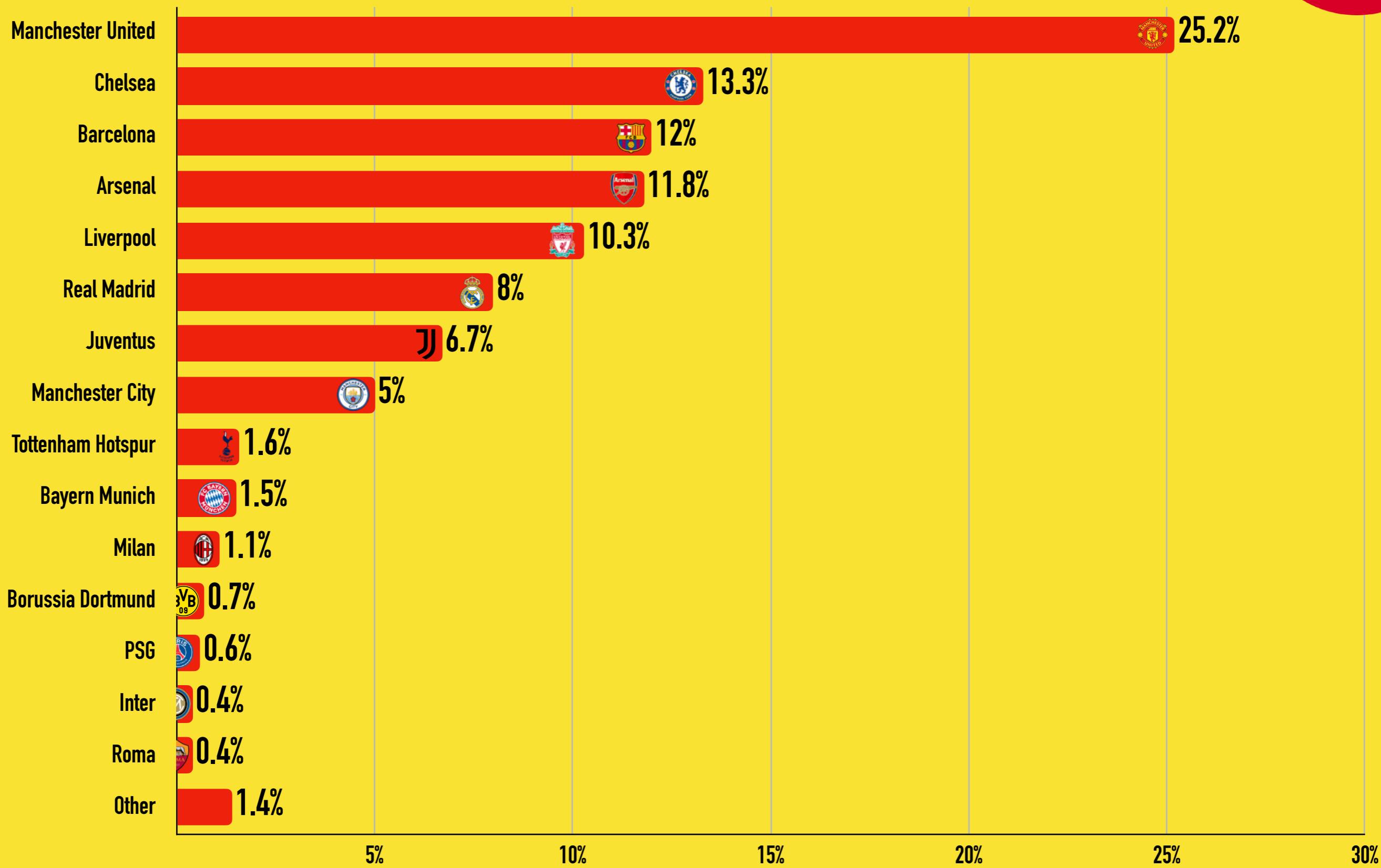


# Supporting



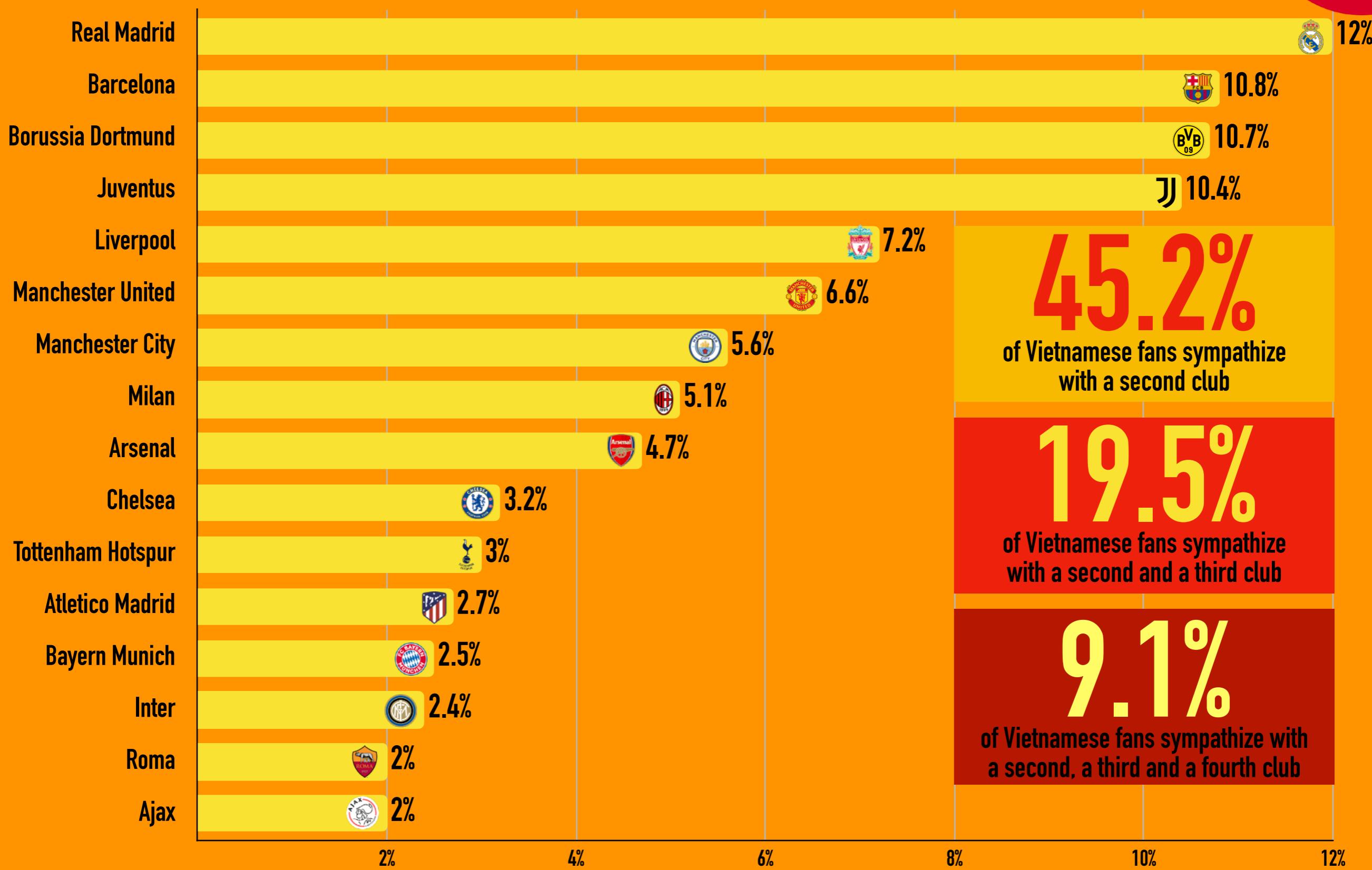


# Most Supported European Clubs



Q: Which is your favourite European Football Club?

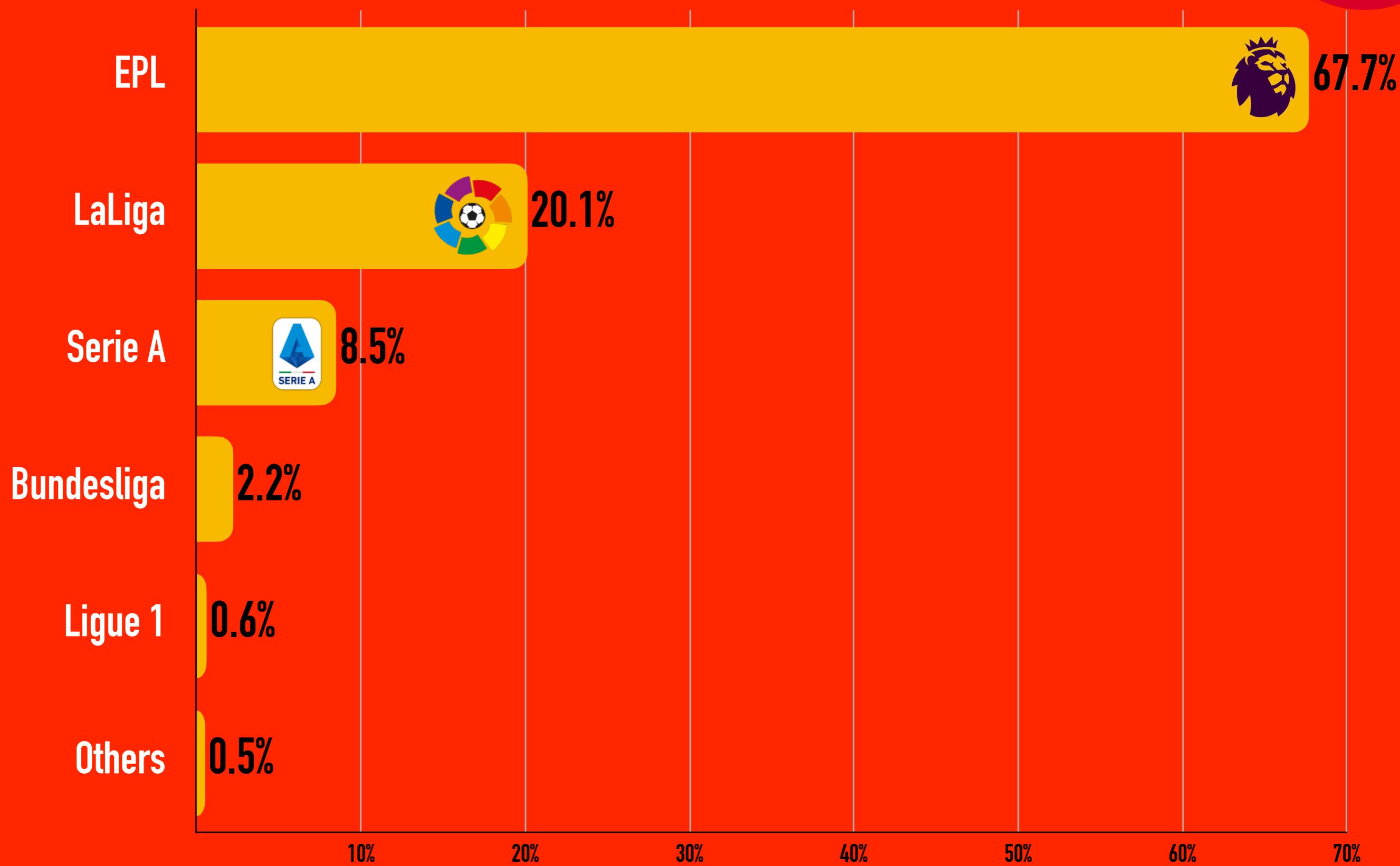
# Other Favourite Clubs



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



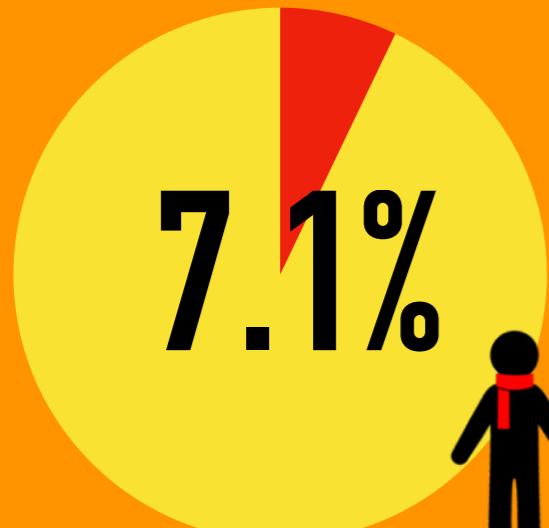
# Most Supported Leagues (by club)



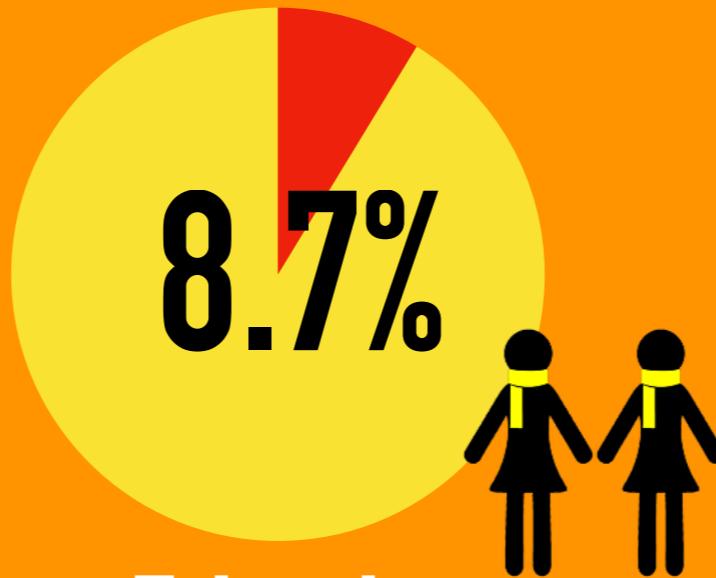
Q: In which league does your favourite European Football Club play?



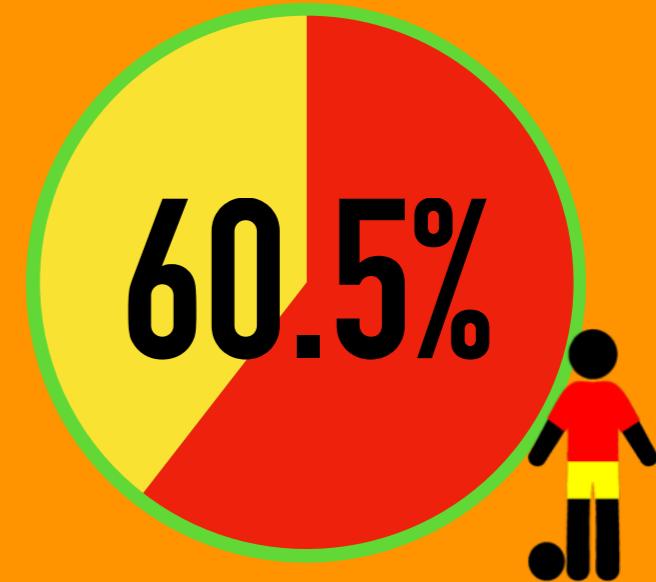
# Reason for Supporting a Club



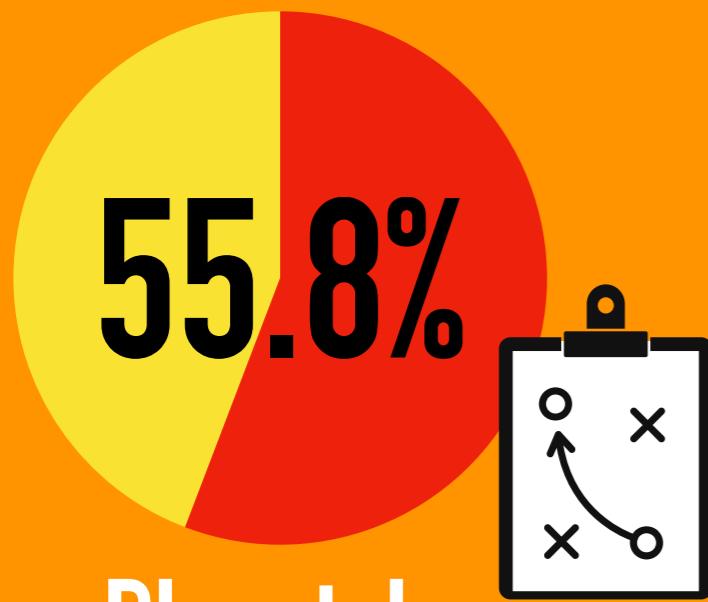
Family



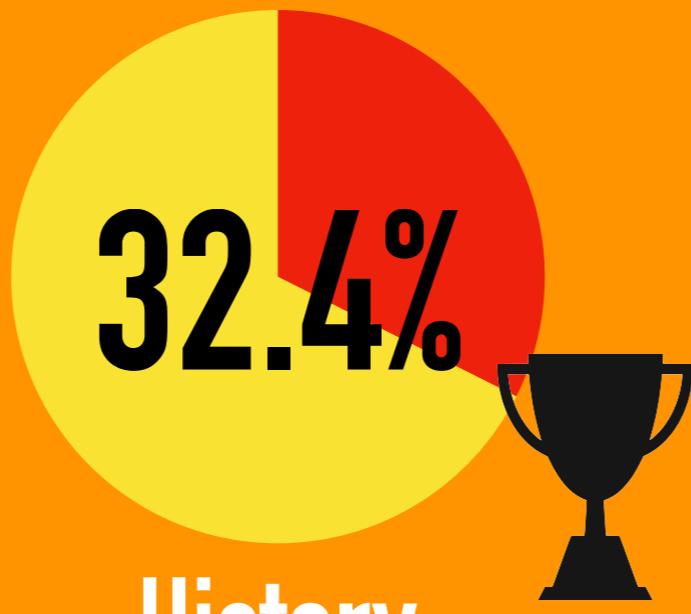
Friends



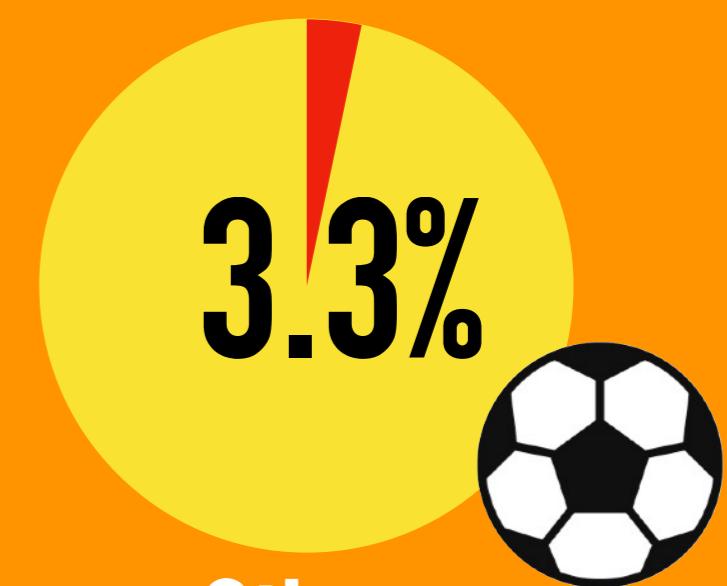
Player or  
Manager



Playstyle



History

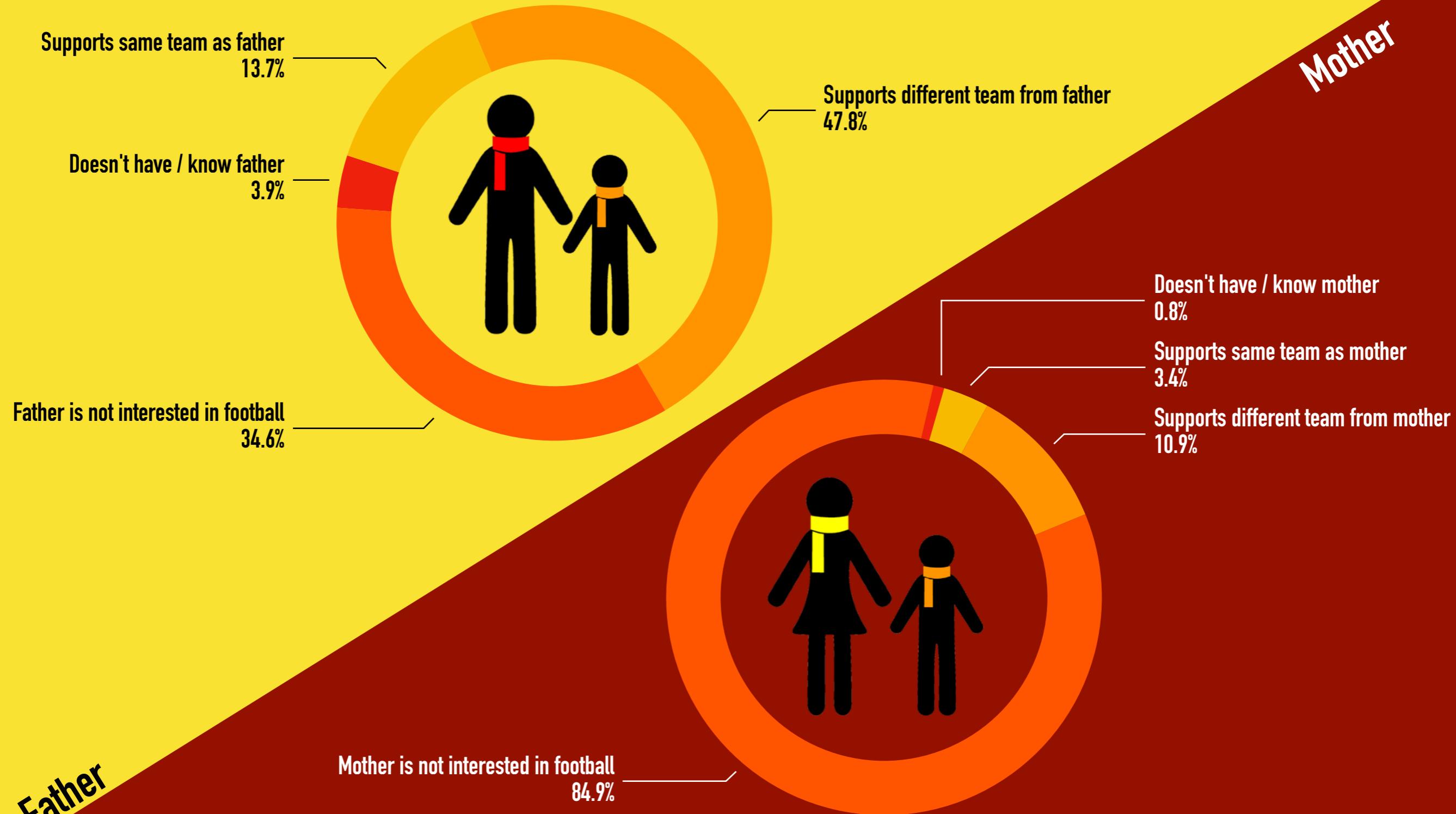


Other

\*Respondents could give multiple answers

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

# Influence of Parents



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



# Switching Club

Supporters who have  
Switched to another Club

**85.5%**

14.5%

Switched Did not Switch

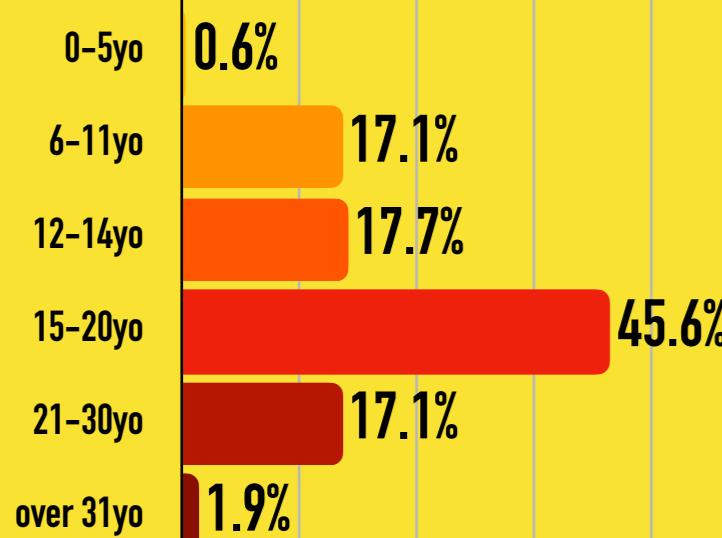
## Adopted Club



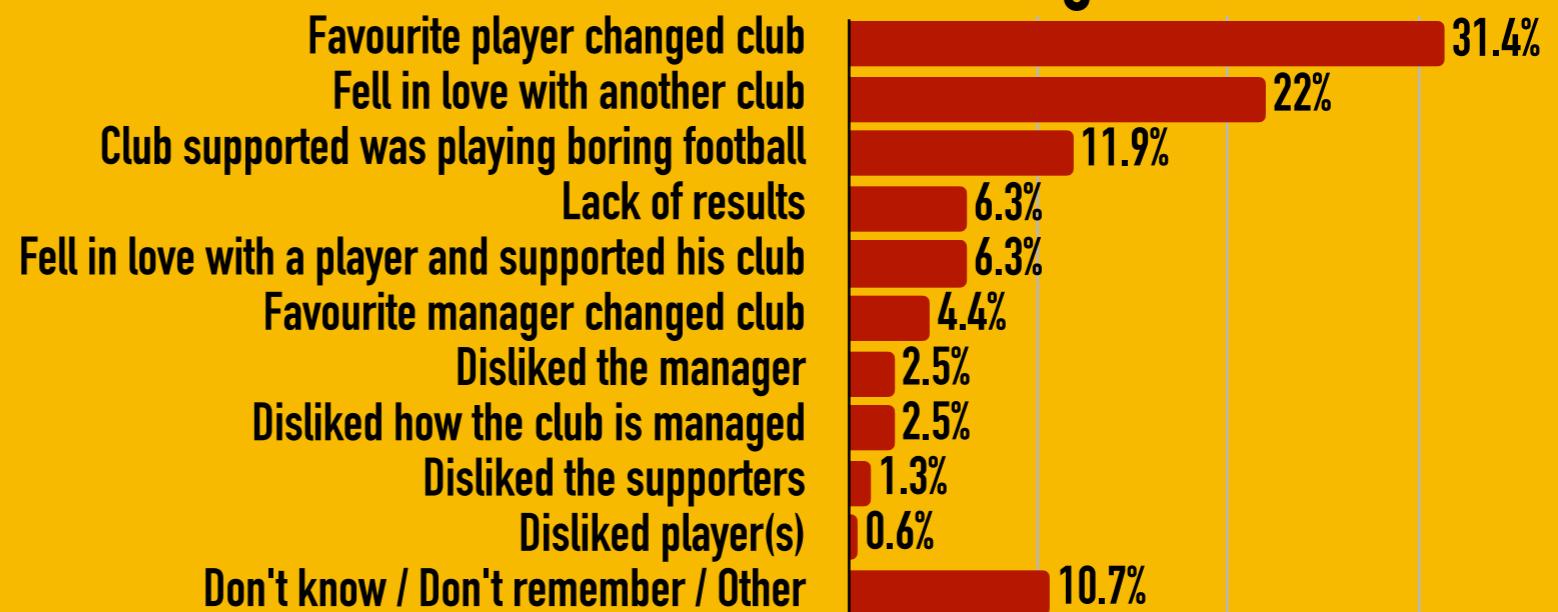
## Abandoned Club



## Age at which Switch happened



## Reason for Switching

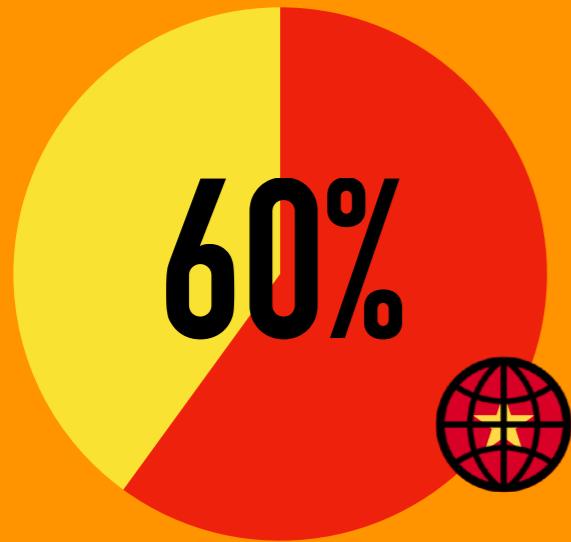


Q: Have you ever changed the European Football Club you support? If yes, why, at what age and which club did you used to support before?

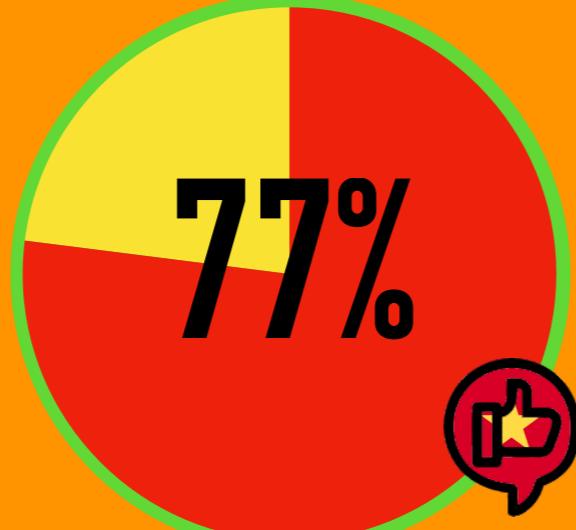
# Media



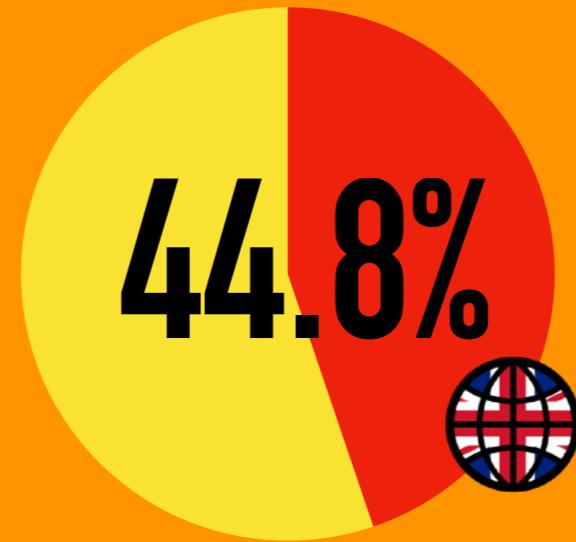
# News Sources



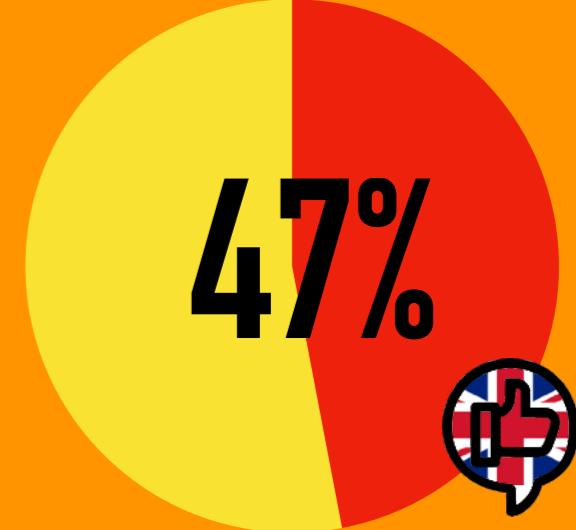
Internet News  
(local language)



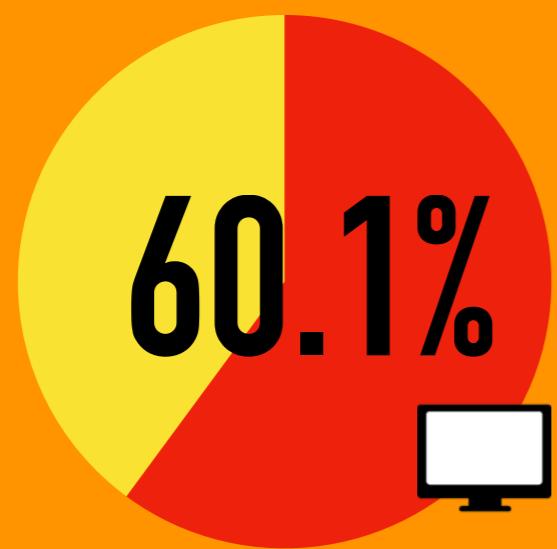
Social Media  
(local language)



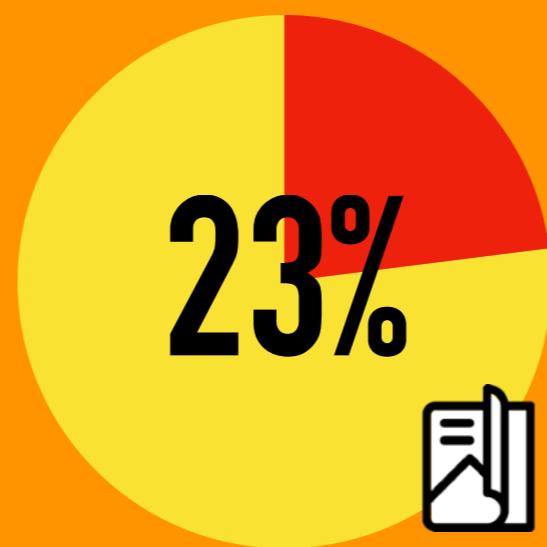
Internet News  
(foreign language)



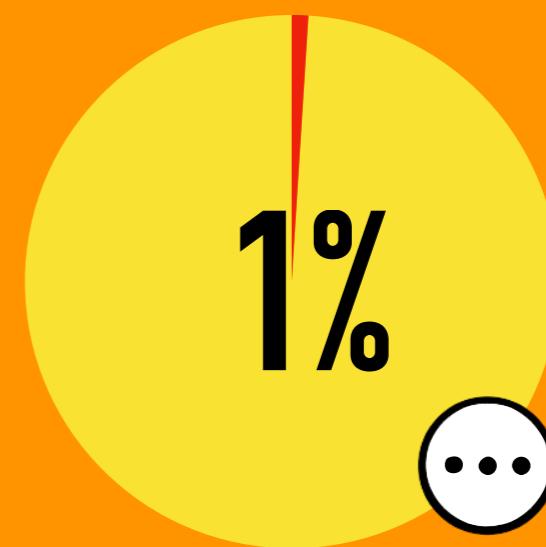
Social Media  
(foreign language)



TV



Newspapers  
and Magazines



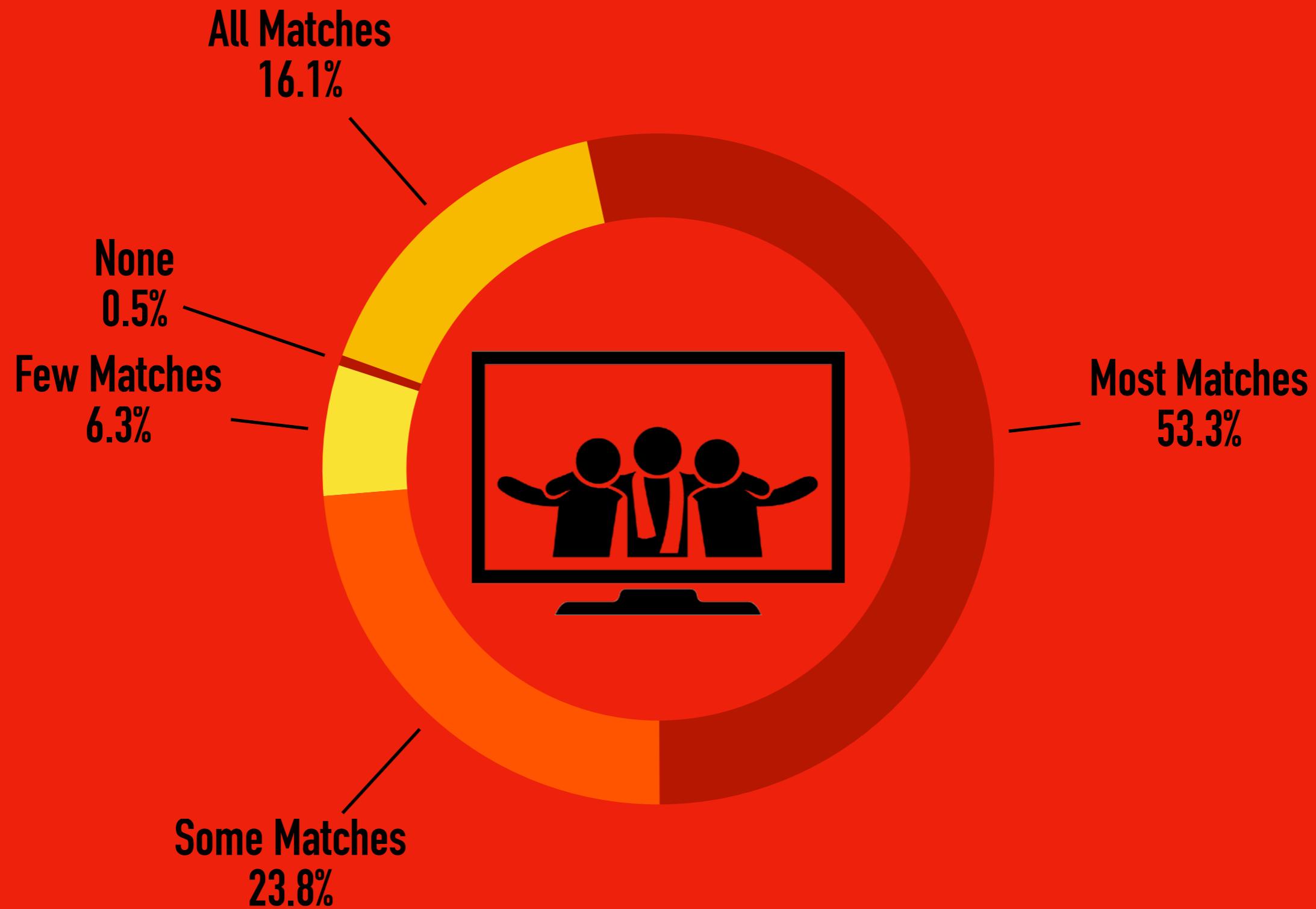
Other

\*Respondents could give multiple answers

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



# Watching Favourite Club's Games



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

# Behaviour

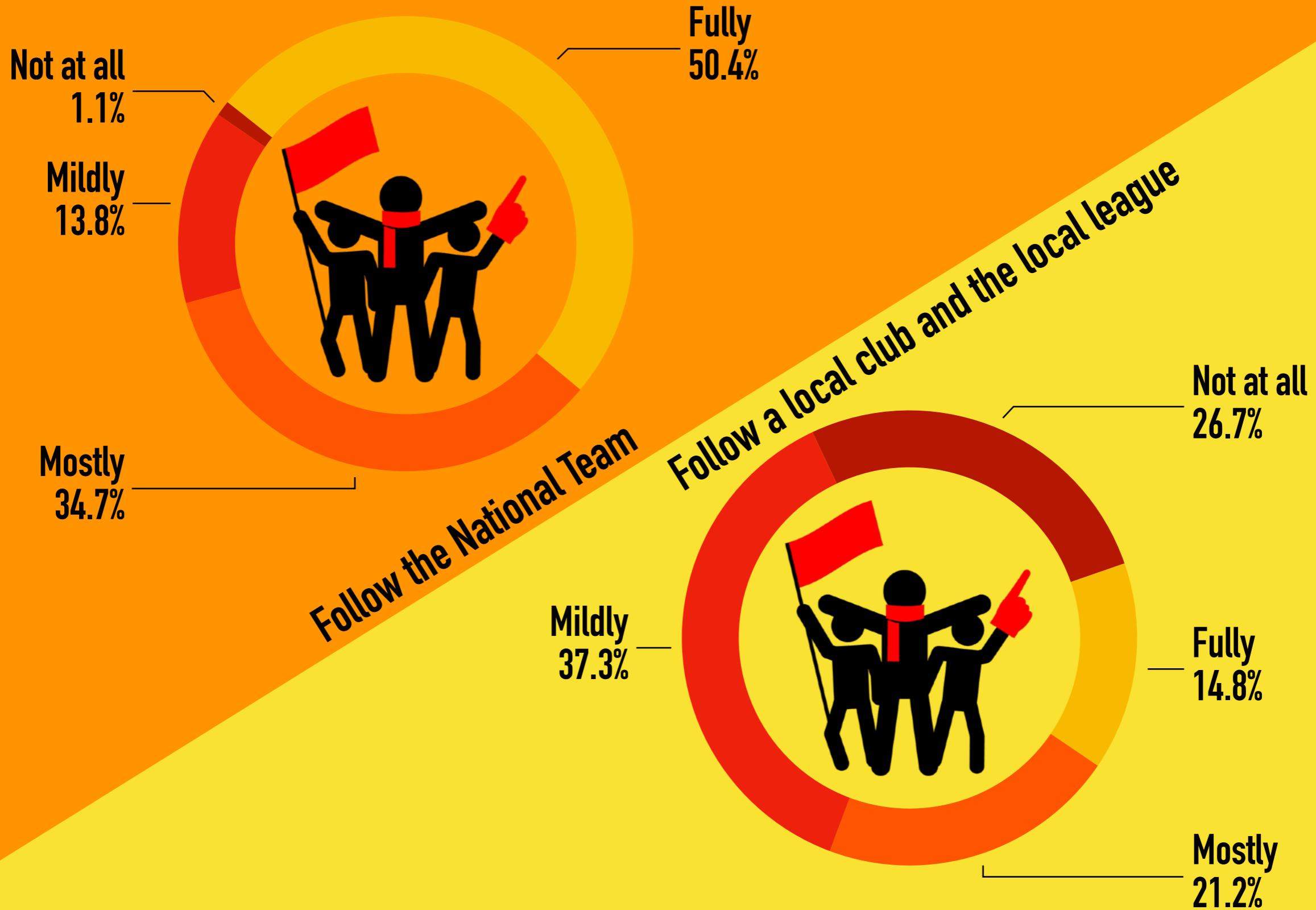


# Purchasing Favourite Club's Jersey this Season



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

# Following Vietnamese Football



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



# Data Story

Serie A may not be as appealing these days as it was in the golden era of the nineties, but thanks to the impressive performances of Juventus the league remains attractive. In the summer of 2018, the now nine-times-consecutive Italian champions managed to execute the glamorous signing of Cristiano Ronaldo to build upon their long-term successful cycle. Juventus' close relationship with Vietnam has solid and deep roots, with the Bianconeri playing a celebrated friendly match in Hanoi only a couple of weeks after lifting the UEFA Champions League trophy in 1996. This match not only became a memorable event in Vietnam, but also occupies a special place in the club's history, as it was captain Gianluca Vialli's last game for the club.

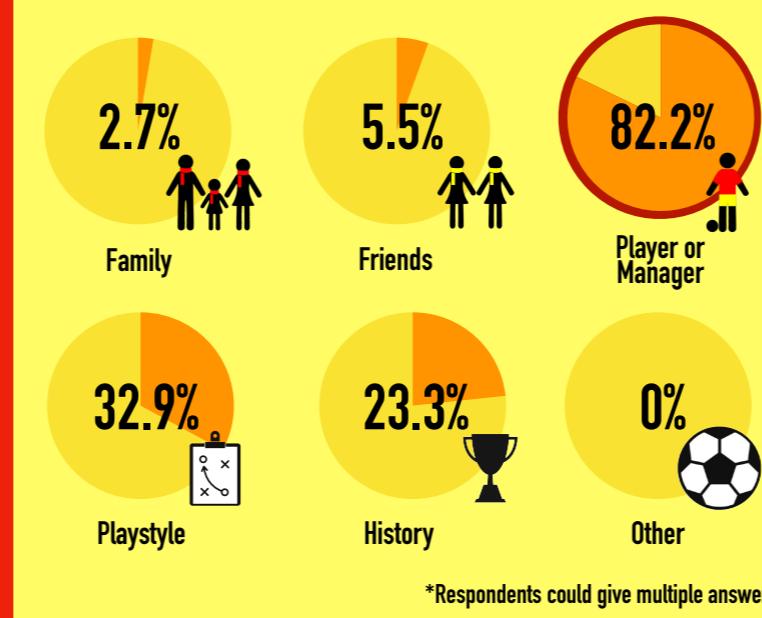
Moving forward to the present, Juventus' popularity in Vietnam may appear reasonably low if compared with that of the Premier League giants: Juventus have a 6.7% share, whereas Manchester United have around four times their support. Chelsea and Barcelona also have more or less double, while Liverpool and Real Madrid are consistently higher in the rankings as well. On the other hand, apart from the Bianconeri there isn't any significant evidence of support for other Serie A teams in Vietnam.

Juventus' impact on the Vietnamese soccer ecosystem is much more consistent than it appears, however. The country has one of the highest switching rates (14.5%), within which we observed that 20.1% of the people who changed their club made the move to Juventus, while only 1.9% abandoned the Bianconeri and chose another team. This means that 2.7% of the whole survey switched from another club to Juventus and that the Bianconeri managed to attract 39.7% of their whole fanbase from another club.



This is much clearer if we focus on the origin of these "migrating" supporters. Almost two thirds (65.6%) came from Real Madrid – a figure which climbs to 75% if we only look at fans under 21 – 50% of whom made the switch in 2018, when CR7 moved to Italy. This trend is confirmed by the "reason why" figures: 59.4% of the supporters who abandoned Real Madrid did so because a player they liked had changed club – and we all know who that was...

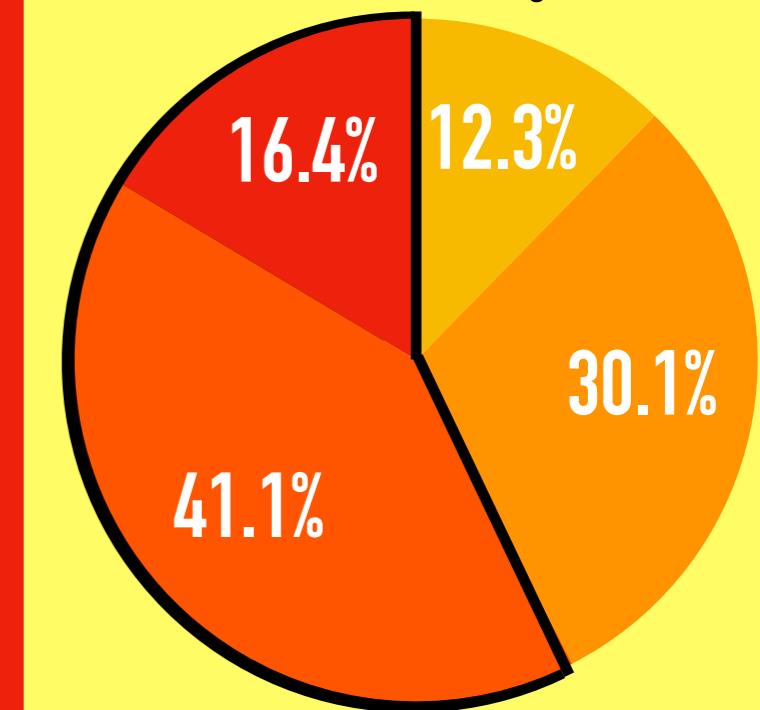
## Reasons why Vietnamese Fans Support Juventus\*



The link between Cristiano Ronaldo and an increased interest in Juventus is confirmed by the fans' "second team" data: 21.9% of Real Madrid supporters – the largest share – didn't dare dump the Spanish giants, preferring instead to follow their idol on his new adventure and nothing more. A similar path can be seen if we look at Cristiano Ronaldo's former team, Manchester United. Twenty percent of the Red Devils' fans chose Real Madrid as their second team, while some 11% chose Juventus.

The Bianconeri supporters' behaviour produces some interesting insights if we look at sales of the club's shirts: during the last year, 12.3% bought an original shirt and a further 45.2% obtained a counterfeit one – something absolutely consistent with the trend in the country, slightly above the average in both cases. Even the connection with the club on match-days looks consistent: some 57.5% of Juventus supporters watch at least 70% of the games live, despite the fact that the Bianconeri play the majority of their league matches in the late afternoon or evening Italian time – fixtures which are not particularly Asian-friendly.

## How often Vietnamese Juventus Fans watch the Bianconeri's games live



CANASSA

– on how Cristiano Ronaldo's Move to Juventus Enhanced the Impact of the Bianconeri in Vietnam –

# Appendices





# Local Voices

Hoàng My (29) is the Vice President of the Chelsea Supporter's Club in Vietnam (CFCVN). She is not surprised when informed that Chelsea is the second most supported club in Vietnam: "We have the most followed football fan-page on Facebook in Vietnam, with 500,000 likes. The club's been doing well in terms of branding, and has a squad of cool, young and talented players. The days when Jose Mourinho displeased people with disagreeable statements are a thing of the past. CFCVN has gained many new young followers in recent seasons, and within that a significant amount of female fans thanks to the emergence of talents like Mason Mount and Christian Pulisic. Frank Lampard's return to the club as manager also encouraged fans born in the early 90s to start watching the team again, and each season a couple of players become fan-favourites and encourage new people to start following the team."

My elaborates on CFCVN's activities: "Besides the Facebook fan page, we have a group with 50,000 members. Fans who want to apply for CFCVN's membership and receive a membership card can register during offline events and pay the subscription fee of 20,000 VND (1 USD) per year. Our main yearly events are: celebrating Chelsea Football Club's birthday; a big offline party for CFCVN's own birthday; a football tournament featuring branches of Chelsea Supporters Club throughout the country; and a Miss CFCVN contest with online voting. We also have weekly charitable events, such as cooking and delivering meals for patients in need in hospitals and donations of clothes for poor children in mountainous areas.

My's generation, having grown up with the internet, has a predilection for online news, especially from social media. "When Facebook joined the Vietnamese market in 2009, CFCVN also changed its platform from a dedicated website to its current form: a Facebook fan-page. People tend to get their information from browsing Facebook and reading headlines nowadays, instead of actually reading the full content."

We asked My about some worrisome data that emerged from our survey: in Vietnam only 15% of fans buy official jerseys, while many opt for counterfeit, cheaper versions. "Your data is very likely to be accurate. In recent years, more and more people are willing to buy an authentic jersey, but compared to other countries in Southeast Asia it is still a very small number."



"Back in 2013, I talked to Chelsea's general manager in APAC, who explained the reasons why it could be difficult for them to organise a tour in Vietnam: the fear of insufficient ticket sales and

sponsorships was one aspect, but he also pointed out there was little chance of selling club jerseys." This is likely due to the fact that prices remain too steep for normal Vietnamese fans, and those willing to travel to London encounter the same financial issues: "Only about 20 Vietnamese fans have been to Stamford Bridge so far, and most of them are students who already live in England. A trip to London costs at least 2,000 USD – which is a huge amount of money for Vietnamese people.

The final aspect we wanted to discuss was female participation among European club supporters in Vietnam. According to our survey, only 18% of fans are women, while 85% of those who answered said that their mother doesn't watch football. My feels strongly about this: "In general, female members of CFCVN aren't able to participate in our events for too long. It's common for Asian women to carry many burdens in their life: after graduating, they will shift their focus toward their jobs, families and/or taking care of their children, meaning they don't have time to join in CFCVN's activities.

As a result, it's even more difficult for a woman to be the leader of the supporter's club. Aside from the reasons I mentioned, they also have difficulties persuading men, the older and tougher ones, to listen. However, the administrative business of these supporters' club needs the hands of a woman, as their carefulness provides a lot of help to ensure events are successful. Moreover, their flexibilities serve as a catalyst for members to unite and become a family, instead of just being fellow members. For me personally, everyone in my family is a football fan. When I was younger, I was able to stay up late at night to watch matches, and was allowed to join CFCVN's activities freely. I met my husband at CFCVN and now, after our marriage and two children, I still receive support from him and the rest of my family. I consider myself very lucky to have their understanding, as it has helped me remain a part of CFCVN to this day."

# Top 10 Comparison Tables



## Most Fans in Vietnam



1. Manchester U.	
2. Chelsea	
3. Barcelona	
4. Arsenal	
5. Liverpool	
6. Real Madrid	
7. Juventus	
8. Manchester C.	
9. Tottenham H.	
10. Bayern Munich	

## UEFA Ranking



1. Real Madrid	
2. Atletico Madrid	
3. Barcelona	
4. Bayern Munich	
5. Juventus	
6. Manchester C.	
7. PSG	
8. Liverpool	
9. Manchester U.	
10. Arsenal	

## Deloitte Money League



1. Barcelona	
2. Real Madrid	
3. Manchester U.	
4. Bayern Munich	
5. PSG	
6. Manchester C.	
7. Liverpool	
8. Tottenham H.	
9. Chelsea	
10. Juventus	

## Most Followers Worldwide



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

\*June 2020

\*2018/19

# About Ganassa



## Our Editorial Teams

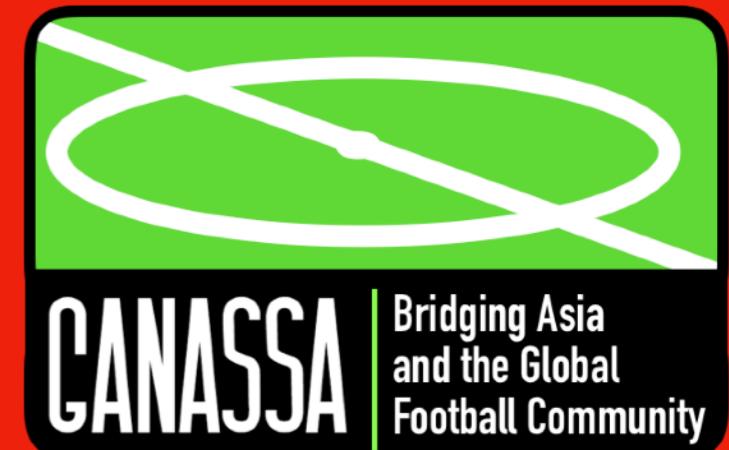


## About Us

At Ganassa we are a team of digital football media experts, specialized in the creation, localization, development and maintenance of websites and social media networks.

We work in Japan and across Asia with a crew of local creators and editors, and we have a close relationship with the fans and the football community.

Our mission is to create a bridge between the football cultures in Asia and those across the rest of the world.



[info@ganassa.jp](mailto:info@ganassa.jp)

## Our Clients



Also Available:  
Japan x Twitter



Japan x Facebook LINE



Japan x Twitter Facebook



Japan x Twitter LINE



Japan x Twitter



China x Weibo WeChat QQ



Japan x Twitter Facebook



Japan x Twitter Facebook



# Credits, Specifics, Disclaimer and Copyright

**Survey's Creator and Director:**

**Cesare Polenghi**

**With the cooperation of:**

Ngo Vu Duy Anh, Pham Nguyet Ha, Nguyen Hong Ngoc, Alberto Cazzaniga,

Sean Carroll, Charlie Houghton, and Stuart Woodward

**Special Thanks to:**

Hoang My and Chelsea Supporter's Club in Vietnam, Federico Casotti

**Street Interviews by:**

Phan Anh Quyet, and Tran Hoai Thuan

**Pictures by:**

Pháp Luật Online, Pham Nguyệt Hà, Goal.com Vietnam, Fanpage Manchester United

Supporters Club in VietNam, Fanpage Official Supporters Club Of Chelsea In Vietnam

**Specifics:**

The total number of valid forms used to compile the 2020 Ganassa Report report is 5457. Interviews were conducted in the streets and online in six different countries: Vietnam, Indonesia, Singapore, Korea Rep., Japan and China. Street interviews were conducted mostly at university campuses and during work breaks in areas where office workers have lunch. The utmost effort was put into interviewing people of both genders and of every age. Online data was acquired with the cooperation of reliable regional websites, Facebook groups, Twitter and Weibo accounts and with the help of influencer's accounts. Great care was put into selecting unbiased sources and in checking the reliability of the data. A comparison between street and online data was used to confirm the consistency of the data. Confidence Level (95%) and Margin of Error ( $\pm 3\%$ ) were kept within professional standards. When data had the same values, alphabetical order was used to tiebreak. The terminology in questions about watching matches (All, Most, Some, Few, None) was explained to interviewees by using respectively the following values: 100%, 75%, 50%, 25%, 0%. The terminology in questions about following local football (Fully, Mostly, Mildly, Not at All) was explained to interviewees by using the following values: 100%, 70%, 35% and 0% respectively.

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# The Six Countries' 2020 Reports

**Japan**

**China**

**Korea Rep.**

**Indonesia**

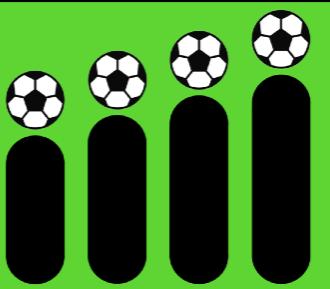
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Thank You

Vietnam