EXECUTIVE SUMMARY

While the majority of soccer fans – particularly those in the United States – are actively using social networking platforms to follow the teams they love, they remain largely unaware or unaffected by the efforts made by those teams to reach them.

In a survey conducted by Football Partnerships, the leading business-to-business network for soccer industry professionals, and European Football Group, a sports marketing firm and an affiliate company of EFG Interactive/MV2 Group, 1000 fans – comprised of soccer consumers and soccer industry professionals from around the world – revealed their loyalties and their social media behaviors.

The cohort, ranging in age from 12-59 and identifying as 70% male, signaled that the domestic leagues in the United States are, encouragingly, attracting interest. 61% of US respondents reported to follow Major League Soccer (MLS), while 30% of Non-US respondents reported the same. 34% and 22%, respectively, believe that MLS is “slowly but surely becoming a major league,” while 22% of US respondents also reported to have followed Women’s Professional Soccer (WPS) in its inaugural season. 51% of all respondents classified themselves as Die Hard Fans, while 39% classified themselves as Avid Fans.

According to the study, social networking platforms appear to play a role in the fan experience, but it remains to be seen whether they are proving effective at increasing club-to-fan engagement or merchandise sales of team/player paraphernalia. With 94% of fans having an active account on Facebook, by far the most popular platform, only 48% of them could confirm that their favorite teams had an account on Facebook – 39% reported that they did not know. Similarly, 32% reported that their favorite teams had an account on Twitter, while 56% reported that they did not know.

As for influencing purchasing habits, 27% reported that, at least one time, they had made a purchase as a direct result of an advertisement on a social media network. 40% of respondents considered information provided by their favorite teams and players on social media platforms as “extremely insightful,” yet – of the 31% that follow professional soccer players or other athletes on Twitter – only 44% admitted that they were more inclined to purchase related merchandise as a result of it.

Turning to the respondents identifying themselves as soccer industry professionals, 70% of those working for a soccer team or league reported that they are actively using social media platforms to engage fans. These include a combination of Facebook (75%), Twitter (54%), LinkedIn (18%) and MySpace (14%), with the primary objectives being to keep fans informed (28%) and to increase top of mind awareness (29%). While 72% reported to be achieving their objectives, 35% of these respondents reported to measure success by tracking the number of users on their social media network and 16% (of the 72% of successful cases) reported that they cannot gauge the effectiveness of their efforts. Lastly, for those 30% of respondents working for a soccer team or league not actively using social media platforms to engage fans, 58% reported that they do not intend to increase their budget next year to accommodate social media strategy.

In summary, soccer fans are almost universally using social media to locate information about their favorite teams and leagues and to interact with other fans. Alarmingly, while soccer industry professionals, namely those working for soccer teams and leagues, are reporting that they are using social media to provide information and to increase brand awareness

Please contact Alexander Kotler, CEO of Football Partnerships, at akotler@footballpartnerships.com or 1 (917) 363-8044, or Michael Wiesenfeld, Managing Partner of EFG Interactive, at mike@efginteractive.com or 1 (917) 774 9626 for additional information. EFG is a Top 25 Global Market Research and polling company.

EXECUTIVE SUMMARY (Continued)

– and are doing so "successfully" – there exists a disconnect between the fans seeking a relationship with those teams and leagues and those teams and leagues seeking a relationship with those consumers. Particularly from the perspective of commercial entities vested in soccer (i.e., team- and league-sponsors), the data suggest that – if this disconnect exists – these brands are not getting sufficient return on investment.

RECOMMENDATION

In the opinion of Football Partnerships and European Football Group, we recommend that soccer teams and leagues evaluate their marketing strategies and determine whether they are properly achieving their objectives with regard to social media. Both third party and proprietary platforms enable these entities to engage and establish personalized relationships with consumers. By providing unique content and sharing inside information – whether soccer-related or not – fans can feel as though they have direct lines to, and one-on-one relationships with, the teams and leagues they support. This could potentially open additional marketing channels and revenue streams down the road. Further, by allocating human resources to achieve these objectives – specifically by establishing dedicated social media departments or focal groups – teams and leagues will likely see an increase in fan involvement, and team- and league-sponsors will enjoy greater return on investment.

ABOUT THE AUTHORS

Alexander Kotler is Founder and CEO of **Football Partnerships**, the leading business-to-business network for soccer industry professionals. With over 3,000 members worldwide, Football Partnerships leverages on- and offline platforms to build relationships and increase awareness about soccer's commercial activities. These include its website, www.footballpartnerships.com, its exclusive newsletter, its weekly podcast and live, top-level networking events such as KICKOFF: NEW YORK, KICKOFF: MANCHESTER, KICKOFF: ATLANTA, and the 76er Mixer (coming this January at the 2010 NSCAA Convention in Philadelphia, Pennsylvania).

The Soccer & Social Media Survey was produced in conjunction with TWEET! Blowing the Whistle on Social Media, a panel discussion organized by Football Partnerships at Major League Soccer headquarters in New York City on Thursday, November 5th.

Michael Wiesenfeld is Owner of **European Football Group, Inc.** (EFG), a New York-based sports marketing agency with an emphasis on soccer. EFG assists overseas clubs, federations, players and sponsors that have an interest in the North American market. The company was responsible for bringing the French Ligue 1 Champions' Trophy to Olympic Stadium in Montreal last summer, the first official Ligue 1 match ever played outside of France.

Michael is also Managing Partner at **European Fieldwork Group** and its affiliate **EFG Interactive, Inc.**, a one-stop shop for market research and data collection worldwide – qualitative and quantitative. EFG Interactive is part of the MV2 Group, one of Europe's leaders in international market research with 150 full-time employees and revenues of $65M (2008).

Discussions are underway for a potential TWEET! Blowing the Whistle on Social Media II in Europe in 2010.

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KEY FINDINGS

- **90%** of consumers actively engage in social networking
- **39%** of consumers did not know whether their favorite team had an account on Facebook
- **56%** did not know if their favorite team had an account on Twitter
- **30%** check their favorite team's website at least once per day
- **70%** of professionals working for clubs/leagues say they are using social networking to engage fans
- **72%** of professionals working for clubs/leagues using social networking say they are achieving objectives
- **16%** of that 72% reported that they cannot gauge the effectiveness of their social media efforts
- **58%** of the 30% of respondents working for clubs/leagues that reported not actively using social media platforms to engage fans do not intend to increase their budget next year for social media initiatives

DEMOGRAPHICS: Participant detail

Survey detail	
1000	Total respondents
800	Respondents from within the United States
200	Respondents from outside the United States

Participant detail	
33%	Members of Football Partnerships*
62%	Do not work in the sports business industry
51%	Classified themselves as Die Hard Fans
39%	Classified themselves as Avid Fans
Signifies full or part-time soccer industry professional	

Age	
6%	12-17
22%	18-24
31%	25-34
32%	35-49
8%	50-59

Income	
15%	Earn less than $35K
23%	Earn between $35K-$75K
9%	Earn between $75K-$100K
19%	Earn more than $100K

Sex	
70%	Male
30%	Female

Education	
45%	Bachelor's degree
30%	Graduate degree

CONSUMERS: Loyalties

On Major League Soccer (US respondents)	
61%	Follow MLS
34%	Believe that MLS is "slowly but surely becoming a major league"
16%	Believe there is "a lack of passion around the game"
14%	Qualified MLS as "competitive"
11%	Reported that MLS is "boring"

As for their favorite league (US respondents)	
68%	Said the English Premier League
12%	Said Major League Soccer
7%	Said La Liga (Spain)

As for supporting the national team (US respondents)	
52%	Said they support the US National Team
13%	Said they support the English National Team

Women's Professional Soccer (US respondents)	
22%	Followed WPS in its inaugural season

On Major League Soccer (Non-US respondents)	
30%	Follow MLS
22%	Believe that MLS is "slowly but surely becoming a major league"
17%	Believe there is "a lack of passion around the game"
11%	Qualified MLS as "competitive"
5%	Reported that MLS is "boring"

As for their favorite team (US respondents)	
24%	Support Manchester United
15%	Support Arsenal

CONSUMERS: Social media habits and behaviors

Social Media Behavior (US respondents)	
23%	Said that ESPNsoccernet.com was their favorite website
8%	Said that foxsoccer.com was their favorite website
8%	Said that premierleague.com was their favorite website

When asked whether their favorite soccer team had an official account on a social networking platform	
48%	On Facebook, "Yes"
39%	On Facebook, "I don't know"
32%	On Twitter, "Yes"
56%	On Twitter, "I don't know"

Social Media Behavior (ALL respondents)	
74%	Check for soccer news online at least once a day
87%	Visit more than one website
47%	Check soccer blogs at least once a week
24%	Contribute to a forum or blog at least once a month
49%	Neither check nor contribute
64%	Said that their favorite soccer website has an online community feature
90%	Use social networks
94%	Have an active account on Facebook
58%	Have an active account on LinkedIn
49%	Have an active account on Twitter
77%	Use Facebook the most
12%	Use LinkedIn the most
11%	Use Twitter the most
38%	Login to social network account of choice "around the clock"
41%	Login to social network account of choice "at least once a day"
4%	Login to social network account of choice "at least once a week"
16%	Use online social networks to "stay up-to-date with centers of interest"
30%	Check their favorite team's website "at least once a day"

When asked whether their favorite soccer team's website had a social networking feature	
43%	Said "Yes"
42%	Said "I don't know"

Regarding fantasy soccer leagues	
53%	Said that have been enrolled at least once in a fantasy soccer league

When asked how insightful the information shared by your favorite team(s) and/or player(s) on social media platforms was	
40%	Responded "extremely insightful" and that they felt a part of the club
45%	Wished that their favorite players and teams were sharing more "locker-room" information
15%	Said that they were not getting anything more out of it

Regarding purchasing habits	
87%	Said that they have purchased at least one soccer item online
27%	Said that, at least once, they had made purchase as a direct result of an advertisement on a social media network
47%	Of these purchases were for less than $100

With respect to Twitter	
31%	Follow professional soccer players or other athletes on Twitter
44%	(Of followers) admitted that they were more inclined to purchase related merchandise as a result of it

Regarding future usage	
56%	Said that they will be using social networks "probably more" next year

PROFESSIONALS: Demographics & Social media habits and behaviors

Regarding industry sector	
15%	Work for a soccer team or league
6%	Work for an agency (any sport)
4%	Work for a brand/sponsor

Social media usage (Respondents working for a soccer team or league)	
70%	Reported that clubs/leagues are actively using social media platforms to engage fans

Preferred social media platforms (Respondents working for a soccer team or league)	
75%	Facebook
54%	Twitter
18%	LinkedIn
14%	MySpace

Use of social media platforms (Respondents working for a soccer team or league)	
36%	Post messages/status updates
21%	Tweet about product launches, events or news
11%	Host groups

Forecast (Respondents working for a soccer team or league)	
54%	Say that their budget will increase next year

Primary objective in using social media (Respondents working for a soccer team or league)	
28%	To keep fans informed
29%	Increase top of mind awareness
7%	To increase ticket sales
8%	Do not know why they are using social media but do because everyone else does

Budget allocation to social media strategy (Respondents working for a soccer team or league)	
45%	Spent less than $1,000 in the last year
7%	Spent between $20K-$100K

Social media success (Respondents working for a soccer team or league)	
72%	Said they are achieving their objectives

Dedicated staff to social media strategy	
47%	Have a dedicated person or department in charge of developing and monitoring social media strategy

Social media accountability and operational resources (Respondents working for a soccer team or league)	
35%	Of the 72% of successful cases measure success by tracking the number of users on their social media network
16%	Of the 72% of successful cases reported that they cannot gauge the effectiveness of their social media efforts

Of the 30% of respondents working for a soccer team or league that reported that they are not actively using social media platforms to engage fans	
58%	Do not intend to increase their budget next year to accommodate social media strategy

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