

RED CARD 2021

C H I N A D I G I T A L

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FOREWORD

Dear reader,

The year 2020 was one of the most challenging years we've endured, impacting the whole sports industry both online and offline. Throughout the year, we all had to adapt and innovate with new ways to serve the fans. It's a testament to everyone that we're able to recognise and celebrate these achievements, as we look forward to a brighter 2021.

Never has digital marketing been more important; from strengthening fan relationships to activating with partners and monetising content, Chinese digital platforms provided new opportunities to progress in 2020. Many of these changes and trends are now irreversible. The digital channels for sports organisations and athletes have in many ways replaced traditional fan and sponsorship initiatives to give way to a new era online, an era that includes virtual tours, local studio shows and video commerce.

In 2020, we witnessed a surge in CSR activities in China as the football industry united in the face of the pandemic and other global challenges. The industry as one gave back to China and its fans, with these efforts celebrated in the Red Card 2021 Awards.

This new world has already carried on into 2021. There's still a long way to return to 'normality' - fans in stadiums and an uninterrupted football schedule - but some areas will never return to how they once were. On a positive note, the situation successfully accelerated us into the 3rd Age of Sport, and demanded changes to the industry that will keep us competitive in an increasingly digitised world.

We hope you will enjoy the report.



Andrew Collins CEO Mailman





#1 in the Red Card 2021 China Digital Performance Index Image credit to CFP

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Changing Media Landscape



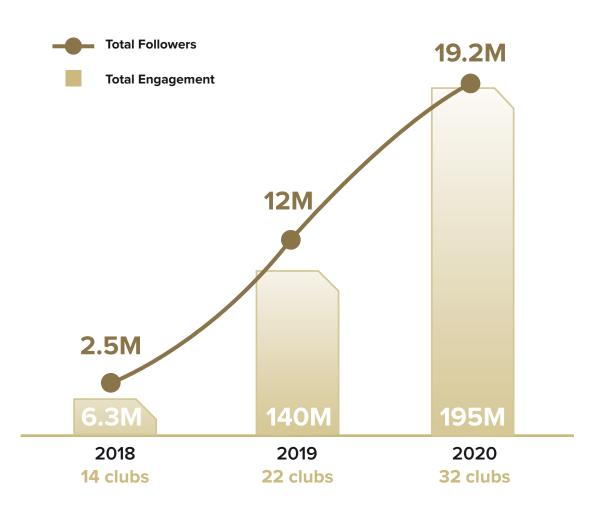
			TOTAL	Weibo Followers	Weibo Total Engagement	WeChat Total Reads	Douyin Followers	Douyin Engagement	Other Platforms Followers	Ecommerce	App/ Mini Program
1		- 0	86	17	11	9	20	20	3	3	3
2		- 0	81	9	11	11	20	20	4	3	3
3		- 0	76	18	9	2	20	20	1	3	3
4		∧ 3	74	9	15	9	12	18	1	5	5
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11	Arsenal	▲ 2	45	11	4	8	4	7	1	5	5
12		▼ 1	39	10	5	4	6	2	2	5	5
13		▼ 1	35	6	3	3	6	6	1	5	5
13	٢	^ 2	35	7	5	5	5	5	2	3	3
15		▼ 1	22	1	3	1	6	2	3	3	3

* The data was collected from January 1st, 2020 - December 31st, 2020. Points were awarded across metrics outlined above. The full methodology on how points were obtained per metric is available upon request.



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Growth of European Football Clubs Douyin





Winner Quote

Enric Llopart, Digital Director of FC Barcelona

"We are immensely proud to receive this distinction for the second year running as the best online club in China and from such a leading consultancy as Mailman. This award confirms our leadership in a key market for Barça and encourages us to continue innovating to connect with our audiences in such a dynamic digital setting as China. This prize is also an important recognition of our constant quest for new formats and content adapted to the local culture, interests and platform dynamics, which allowed us to increase the Club's fanbase bv 60% last season."

Performance Analysis

1 Growth in Accounts

There was a 50% increase in the number of European football clubs on Douyin, this included 10 new teams. Despite this still being less than 50% of the number of European clubs on Weibo, many teams recognised the potential for organic viral reach despite the significant content investment.

2 Platform Partnerships

Both FC Bayern Munich and LaLiga signed official partnerships with Douyin to strengthen their content performance and channel growth in the last year. From a performance standpoint, FC Bayern Munich became the #2 fastest growing team - doubling their total followers in the space of a year.

3 Video Likes

Douyin is the most engaged platform online in China, with each European team able to generate millions of likes from their Chinese audiences. Barcelona, Real Madrid, Paris Saint-Germain and Chelsea were the only four teams that were able to surpass 20 million total likes, these 4 teams represented over 50% of the total football clubs' Douyin engagement.

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Growth of European Football Clubs Douyin

Top Douyin Videos

FC Barcelona
 2M Engagement
 Comedy-style content featuring a cat running on the pitch

Image: Weyner shows off his skills despite criticism from opposition fans

J Juventus1.6M EngagementCristiano Ronaldo's incredible jump & goal

FC Barcelona Ronaldinho's fun high five 1.5M Engagement

J Juventus1.3M EngagementCristiano Ronaldo interacting with a child fan

Douyin Best Practice

1 Understand Your Audience

99% of Douyin's users are not football fans, whilst typically only **5-10%** of your Douyin followers are actual core fans. Use this understanding to better introduce your football organisation and give them a reason to follow.

2 Passionate Narratives

Going viral on this platform requires **emotional storytelling** that resonates with non-football audiences. As you can see from the top five, these can be sad, funny, inspiring or surprising, and completely unrelated to football - the key component in all of them is **emotion**.

3 Consistent Approach

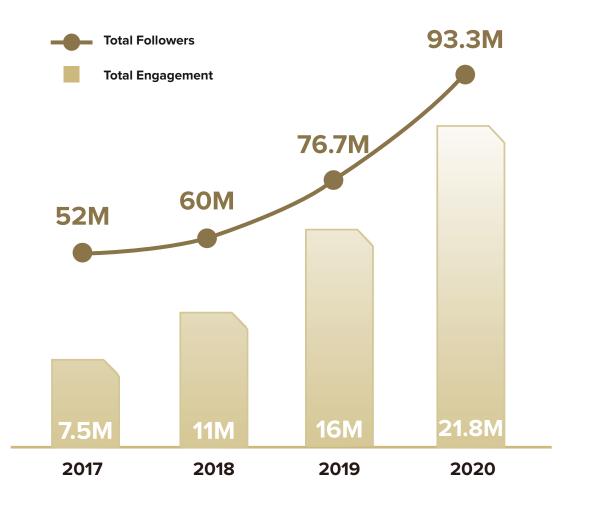
Douyin can be an extremely frustrating platform in terms of content performance. The algorithm requires **a consistent content strategy** that is delivered for a significant period of time, without regularly introducing new content series.

4 Douyin Relations

Follower and engagement growth has started to plateau as the volume of football content continues to increase.



Growth of European Football Clubs



Weibo Best Practice & Insights

1 Creative Approach

During the extensive period without live football, organisations were challenged to engage their fans without a weekly match. Those who adopted **a creative approach similar to consumer brands** were rewarded with year-long fan engagement.

2 Original Video

Weibo is strongly promoting original video content. Although more expensive than simply localising global content, it performs on average **480% better than regular football content**.

3 Interactive Content

Fans increasingly want to engage directly with the content. Formats such as interactive livestreams and votes help to generate higher levels of fan participation - **14 of the top 20 posts from football clubs last year were fan votes**.

4 Data Driven

Categorise, tag and track performance of your content with data management platforms such as KAWO. This will enable you to replace low performing content series and optimise those generating high levels of fan engagement.

5 Partner Relationships

In the same manner as Douyin, **collaborating with the platform** in terms of content output and paid media will help to generate record results. Chelsea FC announced their Weibo partnership with the highest follower growth from all teams.

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Platform Spotlight

Diversification of Media Landscape

In recent years the majority of clubs have focused predominantly on Weibo and WeChat, however in 2018, Douyin arrived as a must-have platform. Since then there have been an increasing number of clubs exploring new emerging or other established key platforms. The goal of this is to either a) underpin the clubs strategy & USP in the market and try to capture a new untapped target audience, or b) achieve certain global and local sponsor goals.



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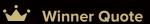
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MOST POPULAR PLAYER



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Cristiano Ronaldo

"Thank you to everyone for this award for the 3rd time. I know how passionate the Chinese fans are about football, and this is a real honor for me. I wish you all my very best and hope to see you soon."



MOST POPULAR PLAYER ANALYSIS

King Cristiano

The player grew 7.7M followers within the first month of launching on Kuaishou, as he **became an official ambassador** for the short-form video platform. This launch helped to double his total China social following.

His launch on Kuaishou hit the headlines across all key sports media in China, prompting reporters to focus on the ongoing battle between Kuaishou and Douyin.Cristiano Ronaldo is the most followed and engaged player on Weibo with 7.4M followers, and 5x higher Weibo engagement than the second most engaged player, Neymar Jr.

Player Decline

A decrease in investment towards China social media from the players resulted in a 15% drop in social output and a 12% drop in engagement. More significant was the drop in follower growth, from **35M in 2019 to less than 3M in 2020**. Despite China being known as an 'icon market', there is a clear flattening of the curve when it comes to player follower growth.

The decrease can be put down to several factors on a local and global level. No club summer tours or ambassador trips with brands in China, as well as a lack of international tournaments such as the FIFA World Cup or EUROs, hurt any potential growth. Only a handful of players such as Cristiano Ronaldo and Marco Reus managed to dramatically increase followers whilst inactive accounts naturally lost followers.

Legendary Status

David Beckham launched on Douyin, gaining **1.5M followers in the first 3 days**, while also becoming the most engaged overseas football celebrity to post on the platform. His original content reached 4.3M engagement, more than any other active or former footballer on the platform.

An example of Beckham's most popular content on Douyin was around the Chinese DongZhi festival, where Beckham celebrated the festival by making traditional Chinese dumplings. Alongside Beckham, there are a number of football legends still engaging fans with interactive video content and live streams such as Rio Ferdinand, Michael Owen, Roberto Carlos and Kaká.



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2 ···· David Beckha	
3 ••• Neymar 7.56	
4 Anthony Martial 6.6	OM
5 Lionel Messi 6.5	9M
6 Thomas Müller 6.4	OM

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MOST POPULAR LEAGUE



👾 Winner Quote

Richard Masters, Premier League Chief Executive

"Football fans in China have shown their loyal and passionate support for Premier League clubs for many years, so we are proud to have won the Red Card award again.

Our inn ovative digital coverage has continued to evolve and prove popular with fans in China at a time when the importance of digital content in people's lives has been emphasised during the COVID-19 pandemic.

We will continue to provide new ways for fans in the country to engage with the Premier League, as we look at developing our digital presence in China."

🚯 Premier League

Premier League is leading in every single category of the Red Card 2021 performance metrics, clearly showcasing its popularity as the #1 league.

Douyin

With 43M+ total engagement, nearly 50% higher engagement than 2nd placed LaLiga, made the English league the most engaged and viewed football account With 2.6M followers, 62% more followers than LaLiga (1.6M followers)

Weibo: 80% higher engagement than LaLiga and 28% higher than Bundesliga WeChat: 83% more reads than LaLiga

Serie A Arrival

Serie A finally launched online in China in December 2020 to complete the top 5 leagues. With their combined Weibo and Douyin followers only reaching 50,000, the Italian league has a long way to catch up.

Leagues vs. Clubs

on Douyin

- (ranked by total views in 2020)
- **1.** Premier League
- 2. Real Madrid
- 3. PSG
- 4. FC Barcelona
- 5. LaLiga
- 6. Chelsea F.C.
- 7. Liverpool
- 8. Ligue 1
- 9. Juventus
- 10. Borussia Dortmund

Source: Douyin, full data under disclosure

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#3 and #5 in the Red Card 2021 China Digital Performance Index Image credit to CFP

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THE IMPACT OF COVID-19



Summer Tours Cancelled

In 2019, 13 European football clubs embarked on tours across China, making it the largest number of clubs to visit in a single calendar year. 2020 was the opposite. COVID-19 meant that no clubs could leave their home country, let alone visit China. This resulted in missed opportunities for sponsor activations but most importantly, on-the-ground fan engagement activities.

Alongside the US, China is the most popular destination for clubs to tour due to growing fan bases, established exhibition competitions such as the ICC and EPL Asia trophy. Many European clubs were able to adapt to the new situation with digital tours throughout the summer, however this will never fully replace the unforgettable memories created during a real tour.



Reactive and Nimble

European football came to a standstill from March last year, resulting in no live games for months and leaving a void of matchday content for Chinese fans. European football leagues and clubs had to react quickly with new bespoke content formats.

Reliving iconic moments was a popular medium, with many organisations exploring their archive to replace live sport. FIFA successfully launched the 'World Cup at Home' series with Weibo Sports to drive record viewership across full match broadcasts with over 33 million total views. Meanwhile Chinese language studio shows were also rolled out across the country, with Chelsea FC, Juventus and Borussia Dortmund leading the way with local hosts, fan challenges and crossover content.



Support Messages

China was the first country in lockdown in early 2020, and football organisations around the world were quick to show their support to the country through donations and messages of support.

Paris Saint-Germain were one of the first to react wearing 'Stay Strong China' jerseys with the messaging also shared around the stadium. A large number of other European clubs including RCD Espanyol, Inter Milan, Tottenham Hotspur, and Real Madrid donated money through jersey auctions and other supplies, while there were hundreds of messages of support from their players and coaches.



CHANGES TO THE MEDIA LANDSCAPE

Rising Platforms

Migu

Winner of the 2020 China media rights battle. The China Mobile-owned digital platform ended the year on a high announcing a partnership with state-run China Central Television (CCTV).

As part of the deal, Migu gains access to the biggest sporting events globally for the next two years, including the FIFA World Cup, Summer and Winter Olympics, and EURO 2020. Migu also agreed a partnership with the Asian Football Confederation in a four-year deal.

Kuaishou

One of the fastest growing videos platforms in China in 2020. Kuaishou, invested in by Tencent and Alibaba, is a short-form video platform rivaling Douyin. Red Card winner Cristiano Ronaldo became an ambassador for the platform, while 3rd placed Chelsea was the first European football club to launch an official account.

A strong focus on live streaming, ecommerce integration and penetration into Tier 2 and 3 cities have put Kuaishou in a unique position. The platform is set for a big 2021 in football.

Broadcast Realignment

Premier League Shift

COVID-19 recalibrated the media rights market. A halt to games meant broadcasters sought remunerations, especially PP Sports, the Suning-owned platform which spent more than \$1B USD on tier-1 media rights in recent years. The English Premier League, halfway through a three-year rights deal with PP Sports worth US\$700M, played hardball and refused to drop its price.

The result: a termination of the contract just weeks before the start of the season. What followed was Tencent Sports stepping in with a one-year deal at a fraction of the value of the PP Sports contract.

Fragmented Distribution

The digital media rights market has come full circle from its China inception. COVID-19 burst the inflated rights bubble meaning broadcasters had less money to entice the biggest sports IPs.

Whereas the previous 'go with the biggest bidder' mindset has been validated in recent years, rights are now being spread across multiple platforms to balance risk, ensure maximum reach and monetise content through social platforms.

Social Commerce

New Money

China is at the forefront of this burgeoning industry, as brands, platforms, KOLs and KOCs are generating billions of dollars. Football clubs are also starting to enter the social commerce space as they recognise this as a new revenue stream in 2021.

Given the deflation in media rights and another year of no summer tours likely, we've already seen Tottenham Hotspur set the benchmark as they became the first European football club to live stream with ecommerce integration simultaneously on WeChat and Douyin.

Fan Engagement

A new avenue to engage, interact, and monetise a fan base. Fans in China are always seeking new forms of entertainment, particularly when live sport was halted. The key here is to integrate hosts who are respected and are passionate about the IP. COVID-19 has accelerated these direct-to-consumer initiatives, and challenged football organisations to generate more two-way conversations between teams and fans. For them, live commerce is the perfect method to achieve this.



WHAT TO EXPECT IN 2021



1. Live commerce dominates performance marketing

Being present on live streaming platforms is an absolute must for any football organisations looking to engage and monetise potential Chinese consumers. This trend is only going to grow as the younger generations enjoy the connection with the host / celebrity selling the products. In 2020, around 40% of China's population participated in live commerce.



4. Esports integrates deeper into traditional

The lines are continuing to blur between traditional sports and esports, particularly in China, where esports' popularity grows even faster. Football organisations have already started integrating further with esports, developing their own esports divisions. Both are now competing for the attention of fans and sponsorship dollars of domestic brands.



2. Kuaishou & Douyin battle continues

Neither platform will be giving an inch as both Kuaishou and Douyin battle for the next generation of users. Both platforms will look to football organisations to grow the level of premium content and attract new audiences. There's enough room for both short-form video giants to succeed but it will become a fascinating battle to watch.

3. Direct-to-Consumer Increases

The focus on D2C will be stronger in 2021, as football organisations seek to establish better relationships with their audiences in China. This will have implications on digital services including membership products, subscriptions options, merchandise and data & CRM solutions.



5. Football audiences return to pre-COVID-19 levels

Esports has proven it's possible to bring fans back into stadiums in a safe and controlled manner. We don't expect them to be packed out in the early months of 2021, but this will mean China could be one of the few countries globally to have fan-filled stadiums, opening vital sponsorship and digital activation opportunities to global and local brands.



6. Government goal alignments

The 14th China Five Year Plan emphasises the continued development of sports as a key consumption sector. There will be opportunities for IPs and brands who seek to tie in government initiatives to drive greater awareness and participation of sports in China.

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#4 in the Red Card 2021 China Digital Performance Index Image credit to CFP

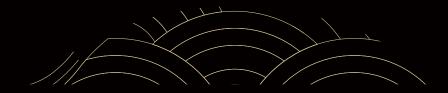
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C H I N A C D I G I T A L O FOOTBALL C A W A R D S

JUDGING PANEL

Welcome to the Red Card 2021: China Digital Football Awards!

This year there were six awards that were voted for by our panel of judges to recognise outstanding performance across China's digital landscape.



Andrew Collins CEO Mailman Group



Wang Dong President PP Sports



Liu Jianhong President KLS Tech / Kaipu Sports



John Yan Founder Score Sports



Li Hong Chairwoman Shankai Sports



Echo Li MD, Greater China SPORTFI<u>V</u>E



Li Shuangfu Co-Founder & President Lanxiong Sports



Jia Baocheng Director of Operations Weibo Sports



Gao Yong Director of Operations Bytedance - Toutiao



Chen Jia Head of Sport Kuaishou



Eric Geng Senior Director China Sports Media



Nikki Wang Head of Sports Business Deloitte China





BEST ORIGINAL PRODUCTION

Why this category is important

A football organisation's original production reflects their level of investment into the Chinese digital market. This year saw a record number of submissions into this category, with clubs, leagues and players innovating with new formats including AR, animation and livestream.

Why this submission won

Real Madrid demonstrated their expertise of Chinese digital in this 75-second video around Chinese New Year. This original production combined everything required to send a video viral within the sports community: featuring star players such as Eden Hazard and Karim Benzema, utilising cultural elements with the players speaking Chinese, as well as integrating local humour through the popular local game of Mahjong. The video was published across owned channels and released to the wider media to drive millions of views for one of the most successful ever Chinese New Year productions.

Background to the Award Winner

#1 Most successful Chinese New Year activation#2 Most followed European club on Douyin#4 Most engaged European club on Weibo

○ FOOTBALL AWARDS GOLD SILVER **BRONZE** BUNDESLIGA

<u>— сніма</u>

21



BEST SPONSORSHIP ACTIVATION

Why this category is important

In a year where live sport was cancelled or postponed, there was a significant impact on the sponsorship rights that were able to be activated. This meant a shift to digital where clubs, leagues and organisations were scrambling to produce new creative digital concepts that offset offline activations. This was the year that a strong China digital presence helped to satisfy partners and drive new value-in-kind.

Why this submission won

Paris Saint-Germain and their principal partner Accor successfully launched the Sponsor Activation of the year online in China, celebrating Mid-Autumn Festival together. This concept was activated offline and online, including the production of over 60K club branded moon cakes distributed across Accor hotels in China. Both Paris Saint-Germain and Accor digital channels amplified the activation online with videos of star players trying the moon cakes, celebrity chefs baking, and messages from the club wishing China a happy festival.

Background to the Award Winner

#1 French team online in China#3 Most engaged European club on Douyin#5 Fastest growing European club on Douyin



OIGITAL FOOTBALL AWARDS

<u>— сніма</u>

22



BEST CSR INITIATIVE

Why this category is important

2020 united the football community like never before, resulting in initiatives by football organisations showing support and providing help to those in need. Although grassroots and football development programmes were still widely run, the majority of this year's Corporate Social Responsibility (CSR) submissions were centred around COVID-19.

Why this submission won

Inter Milan and their Chinese owners Suning launched a CSR programme in early 2020 focused on supporting those affected by COVID-19 in China. The theme 'today and always, together as a team' was shared across all owned platforms as the club donated 300K masks to Wuhan. Their support was visible on stadium LED boards in Milan, as well as on match jersey sleeves with messages to China. Following the match, the jerseys were auctioned raising over US\$62K to help with the pandemic. Inter Milan was one of the first clubs to support in such a way, kickstarting a series of other initiatives by other global sports organisations.

Background to the Award Winner

#1 Most followed Italian club on Weibo#3 Fastest growing Italian club on Douyin#4 Fastest growing European club on Weibo



<u>— сніма</u>



BEST LIVESTREAM

Why this category is important

China's livestream industry experienced a second surge in 2020 as football organisations pivoted to produce content without regular access to the players and match days. The most innovative football clubs and organisations produced livestream content from on the ground in China including celebrities, fan engagement, and ecommerce integration.

Why this submission won

Chelsea became the first European football club to live stream on Weibo and Douyin with an ongoing live talk show exclusively for Chinese fans. The studio show featured match reviews, unseen footage and fan engagement activities including innovative fan voting in real time. As the series progressed, and with the void created by a lack of live games, the show included content beyond football, such as fashion, food, music and basketball. To drive further local relevance, supporters clubs from different cities across China were showcased, including their local specialties and match build-up traditions. The six episodes surpassed 70M views helping to develop the club's presence across China.

Background to the Award Winner

The first Premier League club to launch an official partnership with Weibo Sports #1 Fastest growing European club on Weibo #3 Most followed European club on Douyin C H I N A D I G I T A L FOOTBALL A W A R D S





BEST CREATIVE CAMPAIGN

Why this category is important

As the number of European clubs online in China surpasses 100, the need to stand out more through creative content and campaigns is increasingly necessary. Many teams have already shifted away from a reactive content focus, to instead develop creative concepts. In 2021, we expect to see this to become a more competitive category.

Why this submission won

FC Bayern Munich concluded their treble winning season by launching the creative campaign 'FC Bayern Munich Triple'. This included an offline extension as they brought all three trophies to their Chinese fans with a club tour across five major cities - Shanghai, Beijing, Wuhan, Guangzhou and Nanjing. Each experience included fan interaction, digital production and a fan viewing party with over 200 lucky fans. The creative campaign also integrated virtual reality as fans were able to meet their favorite players. In total, 40K fans participated in the 'FC Bayern Munich Triple' tour offline with millions of reads on FC Bayern Munich social channels.

Background to the Award Winner

Launched an official partnership with Douyin #2 Fastest growing European club on Douyin #1 Most engaged European club on Weibo

GOLD SILVER BRONZE シシ体育

<u>— сніма</u>

FOOTBALL

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BEST ECOMMERCE INITIATIVE

Why this category is important

Ecommerce continued to grow in 2020 with social and video commerce accelerating its growth. This growing industry has seen social platforms, including Douyin, Kuaishou and Weibo, all trying to grow their market share and reduce Alibaba's dominance. The sports sector showed signs of innovation and growth with European clubs experimenting with various degrees of success.

Why this submission won

Wolves delivered excellent creativity through a number of ecommerce initiatives. At the start of the year, the club produced Wolves-branded face masks that were distributed across China to fans and celebrities, as well as ending up in the UK. The club also launched their own store through a WeChat Mini Program where fans were able to buy directly with a members section and limited edition offers. The final activity was in September when the club collaborated with Chinese band Tong Young to produce exclusive t-shirts that were worn on stage during their live performances and made available to fans.

Background to the Award Winner

Top 20 team in the Red Card 2021 rankings Grew over 150,000 new Weibo followers in 2020 Launched an official WeChat Mini Store

○ FOOTBALL AWARDS GOLD SILVER **BRONZE** PANINI OTTENHAM HOTSPUR

<u>— сніма</u>

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WEIBO & DOUYIN AWARDS



Why this award was included

Douyin is one of the most important platforms for football organisations online in China. By creating original content for the channels, football brands can drive viral reach and tap into new audiences with relatively limited paid media investment. Success does not come easily though on this platform with over 600M DAUs, so this Award recognises the football IP with the highest total views throughout the year.

Why the Premier League won

1. The Premier League is the most followed European league on the platform with over 2.6M followers

2. Total engagement surpassed 43M - the highest of any football league

3. The Premier League recorded 1.78B total views - the highest number of any football account



Why this award was included

Weibo is still a dominant social platform for football clubs, leagues and players. With over 100 European football teams and leagues on Weibo, it is the most competitive in terms of fan acquisition. In 2020 there were around 150,000 posts published with a total 7.1 billion total reads across official football accounts. Weibo will always be a critical element of China digital success, and this Award helps to celebrate this year's winner.

Why Manchester City won

1. Manchester City grew to over 9 million Weibo followers - the #2 most followed team on the platform

2. Total engagement surpassed 600K, launching several special fan engagement initiatives with the platform

3. Manchester City launched a series of original production for the local fans, especially their video talk show Most Viewed on Douyin



Most Influential on Weibo

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FOOTBALL



Premier Leagu

Manchester City

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ABOUT MAILMAN

Mailman is a leading sports digital agency and consultancy. Through rich digital marketing, social media strategy, production and ecommerce, we help the world's leading sports brands build audiences and a sustainable business in China.

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W W W . M A I L M A N G R O U P . C O M