

**RED
CARD**

RED CARD 2022

**China Digital
Performance Index**

Published by



MAILMAN
An Endeavor China company



FOREWORD

Dear readers,

Welcome to the 11th edition of the Mailman football Red Card China Digital Performance Index.

As China's digital landscape continued to evolve, so did the major clubs, players and leagues, as many swiftly adapted to emerging platforms and formats to better engage their audiences. None more so than FC Barcelona, Chelsea, Manchester United, and Paris Saint-Germain who finished in the top four of this year's rankings. We saw significant investment into live stream and studio formats from Chelsea, FC Bayern, and Borussia Dortmund.

The social media landscape was inspired with shopping and cultural platform Xiaohongshu, and fast moving Kuaishou beginning to attract sports properties to rival the incumbents Weibo and Douyin. Growth slowed across the premier short video platform, Douyin with engagement across the leading clubs down 10%.

It was a turbulent time for broadcast rights with the shake out of PP Sports, now stating football is no longer a priority. This led to the English Premier League finding a new home with iQiyi Sports following a short period with Tencent Sports. In addition, the national broadcaster CCTV continues to not feature both the English Premier League or LaLiga. The transfers of the big stars Ronaldo & Messi impacted all clubs involved with both FC Barcelona & Juventus taking a hit, while Paris Saint Germain and Manchester United saw healthy growth.

As we round out this year with the FIFA World Cup Qatar 2022, we expect to see significant interest in football and sponsors in China as we did in 2018.

Thank you to all the members of our team who worked tirelessly to complete this report and congratulations to the winners across the categories.

Onwards.



Andrew Collins
CEO



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



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CLUB RANKING

			Total	Weibo Total Followers	Weibo Follower Growth	Weibo Total Engagement	Mini Program / App	Douyin Total Followers	Douyin Follower Growth	Douyin Total Engagement	Ecommerce	Other Platform Followers
1		0	66	10	10	10	5	10	5	10	5	1
2		▲1	62	10	10	10	0	9	9	9	0	5
3		▲3	60	10	8	10	5	4	10	8	5	0
4		▲3	45	3	4	8	0	6	9	10	5	0
5		▼3	40	5	2	7	0	10	6	10	0	0
5		▼1	40	5	2	9	5	4	2	6	5	2
7		▲2	38	10	2	4	5	3	4	5	5	0
8		▲2	36	4	3	3	5	4	3	9	5	0
9		▼4	31	4	3	7	5	3	3	6	0	0
10		▲3	27	4	5	2	5	2	2	2	5	0
10		▲1	27	6	4	3	5	1	1	2	5	0
12		▼5	25	4	2	4	0	5	3	7	0	0
13		▼1	23	5	1	3	5	2	1	1	5	0
14		▼1	21	4	1	4	0	2	2	2	5	1
15		▲3	18	1	2	1	5	1	1	1	5	1

* Data collected from January 1st - November 30th 2021. A full methodology is available on request.



CLUB WINNERS



#1

14.2M total China followers. Number 1 club for the third year in row as they became the most followed team across Weibo & Douyin

Scored maximum points on Weibo across followers and engagement

Strong performance on Douyin as they maintained their position as the most engaged and most followed

Launched a new channel on Xiaohongshu and their China membership platform on iQiyi



#2

14.4M total China followers. Highest ever finish for Chelsea, becoming the most popular Premier League club online in China

Chelsea's follower base grew more than any other team online with 2.86M new fans

Successful presence on Kuaishou supported their growth into second place with around 1M followers

The club's inactivity on WeChat Mini Programs and ecommerce platforms ultimately saw them fall short of first place



#3

12.3M total China followers. Back into the top 3, the club rose three places as the joint highest-moving team, buoyed by the return of CR7

Still the most followed and most engaged team on Weibo - 30% higher total engagement than Barcelona

Grew 1M followers on Douyin, but still only the #8 most followed team on this platform

Below Man Utd, there is a significant gap to the other European elite

"We are thrilled to receive this award as it reaffirms the Club's commitment to millions of Culers in China and recognises the fans' increasing interest in FC Barcelona over the last three years. Our goal is to create content that represents Barça's unique style and values, whilst also reflecting Chinese culture in an evolving and dynamic digital environment. We will continue to provide innovative ways to bring our fans ever closer to the Camp Nou."

- Bryan Bachner, Managing Director of Asia Pacific

Quote from the Winner

RED CARD 2022

FC BARCELONA #1 in Red Card 2022

Image credit to CFP



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MOVERS & SHAKERS



#2 most engaged team on Douyin resulting in 861K new followers - the third fastest growing team

#5 fastest growing team on Weibo with over 60% of new followers added after the Messi announcement

The club Tmall store continues to provide local products at low prices for their diverse Chinese community



Back into the top 10 in the rankings as the club innovated with new content across live and short-form formats

Successful activation around women's team signing and Chinese international Tang Jiali to become the 4th fastest growing on Weibo

Social commerce stores on WeChat, Weibo and Douyin combining content, commerce and community



The first time in the Red Card top 15 at the expense of Espanyol - climbing from #18 position

Strong presence across social platforms including a WeChat Mini Program, ecommerce and Bilibili

Creative crossovers with Wolves Esports to engage their wider gaming community with local game titles

FASTEST ADOPTERS



Kuaishou: Short-form video, live stream MAU: 573M

The platform has looked to sports content for growth, striking a partnership with Cristiano Ronaldo and a long-term content collaboration with the Olympics. Chelsea became the first European football club to launch on the short video platform in January 2021, and are closing in on 1M followers.

Chelsea have also innovated around live streaming. Streams from Stamford Bridge before games reach over 3M views and the club has also begun to live stream their premium studio show on the platform.



Bilibili: Long-form video, live stream MAU: 267M

FC Bayern launched on Bilibili in November 2021 as the first top 15 European club to join the platform. Bilibili focuses on long-form videos and has traditionally been dominated by Animation, Comics and Gaming (ACG) content.

In recent years the platform has pivoted to mainstream content and with that, football clubs sensed an opportunity to connect with its younger user base. Success requires a bespoke strategy with original long-form content series and collaboration with Bilibili influencers.

JUVENTUS



Xiaohongshu: Instagram-style, ecommerce MAU: 200M

Xiaohongshu has traditionally been a home for fashion brands with a large female user base. In 2021, the platform welcomed sports organisations, with a content partnership with the Olympics, as well as Juventus and FC Barcelona opening official accounts on the same day.

Both teams have focused their content on culture and lifestyle, whilst also promoting the attractions of their home cities by working with popular influencers to expand their fan bases into different demographics.



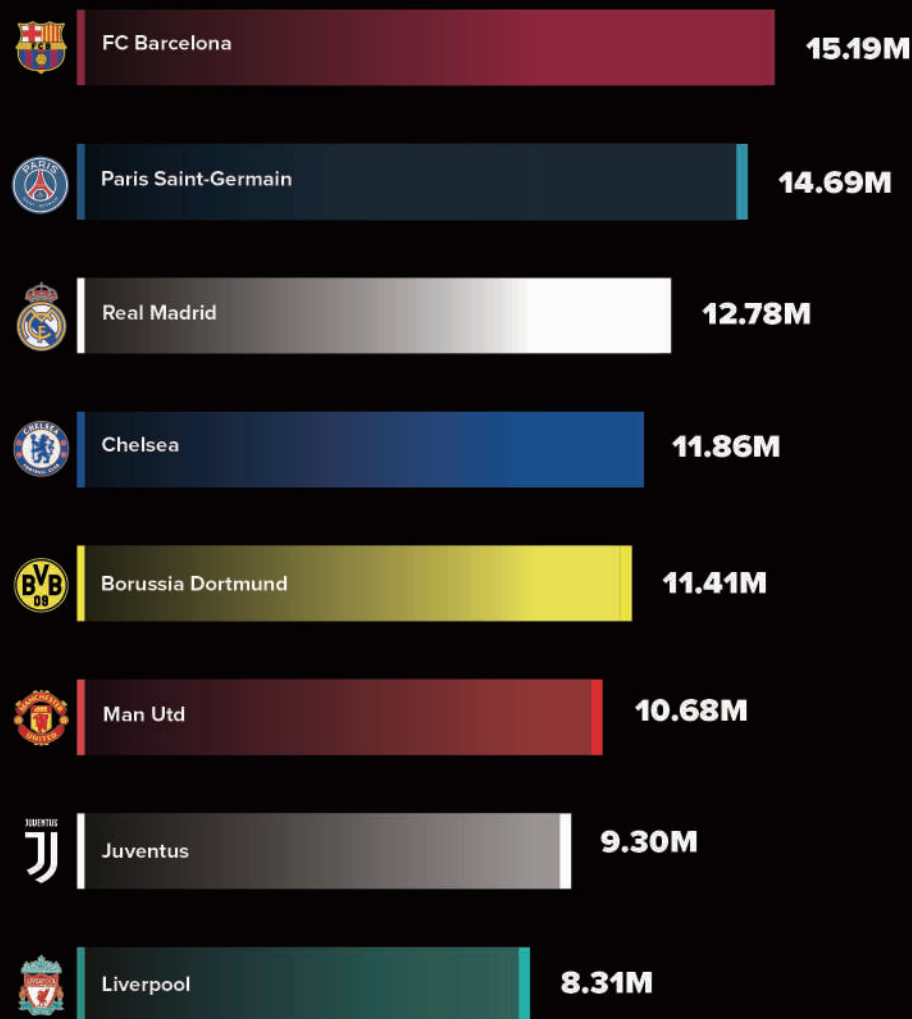
iQiyi: Broadcasting, subscription MAU: 570M

Barcelona linked up with sports broadcaster iQiyi Sports to launch their 'Barca iVIP' members program in mid-2021. iQiyi holds the broadcast rights for both LaLiga and European club cup competitions, and they have carved out a section of their app for the Barcelona collaboration.

Barcelona members enjoy extra benefits including exclusive content, HD viewing, multilingual commentary and ecommerce offers. The partnership also links with Barcelona's experience centres, with members able to enjoy additional discounts.

DOUYIN DOMINANCE

Most Engaged Teams



1 Douyin Is The Dominant Platform

Douyin is the preeminent platform for reaching a mass audience in China. The platform has over 600M MAUs and crucially is home to more younger, affluent people than most other platforms in China. The top teams from each major European league now have official accounts on the platform. Douyin and Weibo are now safely the two most important platforms for football teams operating in the Chinese market.

2 Record Signings Transcend Football

The Ronaldo and Messi transfers were two of the most talked about sporting moments in China and the top hashtags related to the transfers have totalled over 1.35B plays to date. The transfers also helped Man Utd and PSG expand their fan bases on the platform, with both teams seeing their followers grow 40% and 37% respectively in the month after the signings, as well as a significant increase in engagement.

3 A Tougher Growth & Engagement Environment

2021 did provide a more challenging environment for clubs to grow and engage on Douyin. Year on year, the total engagement for the top 10 clubs decreased by 1.0% with the platform reducing promotional support. After three years of abundant engagement and growth, 2021 was the year where clubs had to re-evaluate their strategies for how best to reach fans and engage on the platform.

4 The Right Content Still Wins

The most successful teams in 2021 mixed videos of funny and emotional moments from the club's past, traditionally the best way to engage fans on the platform, with fast paced clips from their recent on pitch success. The on pitch clips that were posted quickly after they happened proved to be particularly well engaged, as well as those jumping onto viral hashtags.

*Number = Total likes, shares and comments across all club videos



CHELSEA #2 in Red Card 2022

Image credit to CFP

PLAYER WINNERS



Cristiano Ronaldo

55 Total Points



Neymar Jr

32 Total Points



Lionel Messi

29 Total Points



Thomas Mueller

26 Total Points



Paul Pogba

16 Total Points

No Breakthrough

The top 3 rankings remain the same for a fourth consecutive year. Due to lower growth opportunities on the platforms, new athletes will have a much harder challenge to break their dominance unless they are truly committed to producing unique content and working closely with the platforms and fans.

Player Transfers

One factor that has shaken the existing rankings is the transfers of Cristiano Ronaldo and Lionel Messi. These moments had a significant impact on their own personal channels but even more so on the club accounts, with the teams growing a combined 1M followers in the following month.

Celebrity Impact

In the biggest collaboration of the year, Paris Saint-Germain welcomed one of China's top celebrities Jay Chou, a famous singer, to the Parc des Princes. The club made the most of his appearance with livestream content and player activation, resulting in over 150M social reads.

Beckham's Legacy

David Beckham continued his icon status as the fastest growing football star online, with his total fan base reaching 10M. His commitment to producing local content helped generate record viewership on Douyin, and would have ranked #4 in the player rankings.

"It's been a great year connecting with my Chinese fans online and reaching 10M followers. Celebrations around Chinese New Year, cooking delicious local meals, and even learning to speak more Mandarin... these have been just a few of the highlights. I've always had such amazing support in China and it's great to be able to share more stories with fans through these channels"

Quote from David Beckham

THE RONALDO & MESSI

IMPACT



Personal Account Growth (Weibo)



Personal Account Engagement (Weibo)



Club Account Growth (Douyin & Weibo)



Transfer Announcement Engagement (Weibo)



Club Total Engagement (Douyin & Weibo)



Douyin Hashtag Views



*Data covers the four weeks following the breaking news of each respective signing: Messi - from August 9th onwards, Ronaldo - from August 26th onwards.

To best showcase the power of players, the Red Card 2022 analysed data across Messi and Ronaldo's Weibo, as well as Paris Saint-Germain and Man Utd's social channels.

Messi Transfer Captures Public Attention

The Messi transfer was more engaged online, with 157M more Douyin hashtag views and more engagement across both his own Weibo and club channels. Ronaldo, however, also has a significant presence on Kuaishou with over 7M followers and received a big boost in his engagement after his transfer.

Huge Boost For Club Channels

The two transfer announcements were by far the two most engaged Weibo posts from football clubs in 2021. The Ronaldo signing resulted in Man Utd becoming the most engaged club on Weibo, whilst also significantly growing their followers across all Chinese platforms.

Barcelona & Juventus Impact

Both Barcelona and Juventus saw an immediate negative impact after the transfers as their engagement and growth dropped. On Douyin, a platform where more casual fans follow club accounts, Barcelona lost over 93K followers, whilst Juventus dropped by 28K.

"It's an honour to win the Red Card Award for Most Popular Footballer Online in China for the 4th year in a row. The support from fans in China has been amazing so it is important for me to continue engaging with them on social media across my Weibo and Kuaishou channels."

Quote from Cristiano Ronaldo

LEAGUE WINNERS



Premier League Dominance

The Premier League are number one for the fourth year in a row. Success was driven by record engagement across all platforms, especially on Douyin with 6x higher engagement than second place Bundesliga.

New Platform

The Premier League was the first to launch on Bilibili, combining their successful ePremier League esports tournament with long-form video formats to engage this unique younger audience.

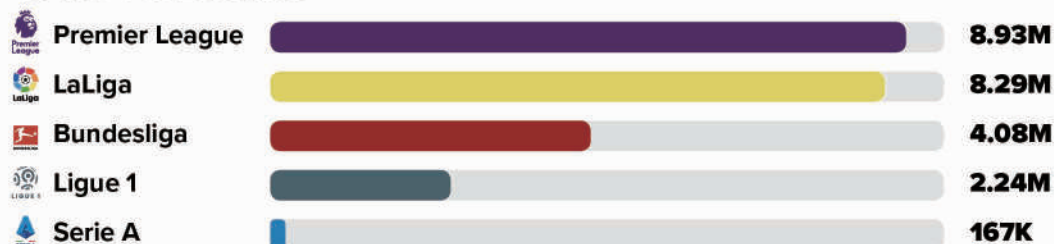
LaLiga Growth

LaLiga extended its gap with Bundesliga as it became the fastest growing league online with 2.4M new followers, 2.5x more than the Premier League. LaLiga was also the only league with a WeChat Mini Program.

Bundesliga Battle

The German league had strong engagement, especially on Weibo with a 2x higher total than Ligue 1. However Ligue 1 did outperform the German league in new followers with 20% higher growth.

TOTAL FOLLOWING



"We are delighted to have won the Red Card award for a fourth successive season, recognising the Premier League's commitment to providing innovative ways of engaging with football fans in China. Once again, it has been great to see our digital content prove popular with the passionate and loyal supporters in China. We have seen record engagement on existing platforms along with successful new developments, including the first season of ePremier League China and becoming the first European league to launch on Bilibili. We look forward to introducing more ways for fans in China to enjoy the Premier League experience."

- Premier League Chief Media Officer, Paul Molnar

Quote from the Winner

MAN UTD #3 in Red Card 2022

Image credit to CFP



MEDIA RIGHTS SHAKE-UP

The most defining year in China's media rights landscape as the industry recalibrated itself to reflect the new normal. Rights fees plummeted, as rights holders made multi-platform deals to spread risk and maximise eyeballs. Here we take a look at the top five moments in 2021.



CCTV Interest Drops

The level of interest in domestic European football from CCTV has dropped notably this year. CCTV have placed football content down the pecking order, with the Tokyo and Beijing Olympics given clear priority.

That said, with 2022 a FIFA World Cup year, CCTV will no doubt be upping its football content as the showpiece event in Qatar draws closer.



Bilibili Enters Football Arena

Bilibili landed exclusive rights to the English FA Cup for three seasons. A test of the waters for Bilibili, which is best known for esports & gaming content, most notably the \$110M League of Legends deal.

Claiming a youthful audience, the YouTube of China could be a worthwhile platform for traditional rights holders looking to reach new audiences. A large number of European football clubs have recently launched official accounts on the platform.



Migu lands Big Five

China Mobile-owned Migu made the biggest splash in 2021, emerging from relative obscurity to become the biggest media rights player in football. European football fans in China can now watch all matches live from the big 5 European leagues: Premier League, LaLiga, Ligue 1, Serie A, and the Bundesliga.

Backed by the government, a partnership with CCTV5, and powered by 5G, Migu is widely seen as the safest and most lucrative broadcast partner in China.



iQiyi Exclusive

iQiyi Sports is known for its shrewd purchases and stable business model. EURO 2020 was a big hit in China last summer, while iQiyi Sports had exclusive digital rights for the tournament, and followed that momentum by landing exclusive rights to the Premier League, to go alongside its established LaLiga partnership.

iQiyi also invested in a number of variety shows around EURO 2020 to engage non-football audiences.



PP Sports' Crash

The warning signs were there in 2020 for PP Sports as they had to terminate deals with a large number of sports rights holders. Things only got worse for the platform in 2021, with parent company Suning declaring sports was not an important focus of their business.

Since then, PP Sports has stayed alive, just, picking up non-exclusive deals. PP Sports has also lost a court battle with the EPL, landing the Chinese platform in the untenable position of owing the league \$213M.

SPOTLIGHT: EURO 2020

Despite unfriendly hours, bars and restaurants were packed, even for 3am kick offs, with social media flooded with commentary and celebrations. We look at EURO 2020's big wins, which provide key learnings ahead of this year's FIFA World Cup.

Mass Reach On Linear & Digital

Government-owned China Media Group held the traditional broadcast rights and provided coverage to CCTV and Migu for EURO 2020, while Supersports owned the new media rights, distributing them to iQiyi Sports. The most-viewed game in China throughout the EUROS was Hungary vs Portugal.

Migu invested a lot throughout the tournament on assets such as well-known commentators, alongside partnering with overseas vloggers to bring more energy and personality to the broadcast.

Big Name Chinese Sponsors

Several big name Chinese companies sponsored EURO 2020, including electronics maker Hisense, mobile phone brand Vivo, and Alibaba's financial services platform Alipay. Hisense ranked first among all sponsor brands with 25.27% customer awareness. Vivo became the first brand to sponsor the opening and closing ceremony.

In 2018, Alipay signed an eight-year partnership for EURO 2020 and 2024 worth \$238.5M. The official UEFA Mini Program was also launched exclusively on Alipay.

Tournament Dominates Social

The tournament was one of the social media stories of the year, dominating attention across all sectors of Chinese society. On Douyin, EURO 2020 hashtags received over 13B views and EURO 2020 related videos received over 5B views.

TikTok, the international version of Douyin, was a tournament sponsor. On Weibo, EURO 2020 related hashtags received over 25B reads, showing the power of major tournaments to reach way beyond football fans.

EPL Boosts England Popularity

European football leagues influenced international football in China, as can be seen through the popularity of the England national team and players based in England. The England national team is the most followed national team, partly thanks to the popularity of the Premier League and the star teams and players that feature.

The dominance of the league looks set to continue to influence the popularity of the England national team.

2022 PREDICTIONS

Ahead of what we expect to be a busy and defining year, we take a look at FIFA World Cup expectations, creative online summer tours, alignments with new policies, and the impact of fast-growth digital platforms.

1 FIFA World Cup Frenzy



Excluding the Olympic Games, there is no bigger sports event in China than the FIFA World Cup. Regardless of China's participation at this year's tournament, the FIFA World Cup will take over the sports calendar with hundreds of millions of fans following their second-favourite nations into the early hours of mornings.

There will also be plenty of interest for Chinese sponsors such as Wanda, Hisense, and Mengniu, who will be activating online and onsite in Qatar.

3 Fitness & Health Support



China has put a fitter and healthier population at the top of their priorities for the next few years, opening up opportunities for global sports organisations to provide support and education.

This presents opportunities to build bridges with the government. China sees the West as leaders in fitness education, and is open to sports organisations bringing their talent and expertise over for support and guidance.

2 Refreshed Summer Tour Solutions



BVB and Bayern Munich, as well as AC Milan, have been the most creative in producing engaging virtual summer tours while producing on-the-ground activities utilising their in-market teams.

The tricky part is implementing fresh ideas to satisfy hardcore fans. The most popular activations from summer 2021 were trophy tours, pop-up carnivals, and CSR events.

4 Xiaohongshu & Kuaishou Opportunities



As is with China's rapidly growing digital ecosystem, new platforms and opportunities pop up every year. This year, we expect even more activity on Kuaishou - the popular short video platform rivalling Douyin. Kuaishou has strong ecommerce capabilities and has been diving deeper into sports throughout 2021.

Xiaohongshu is a lifestyle & content platform, and currently only a handful of clubs have launched, but this could potentially be the biggest growth platform in 2022.

PARIS SAINT-GERMAIN #4 in Red Card 2022

Image credit to CFP



ABOUT US

Mailman is China's leading sports digital agency. We exist at the intersection of digital & sports. We help top sports organisations & brands to build sustainable businesses in China, one of the world's most challenging markets. Mailman is part of the Endeavor network.



Business Opportunities

David Hornby
david@mailmangroup.com

Questions about the Report

Tom Elsdon
tom@mailmangroup.com

Media Enquiries

Denis Green
denis@mailmangroup.com

Thank You to the Red Card 2022 team - Wu Yuhan, Lin Dingkang, Shi Xuehan, Ben Xiaozheng, Dom Lytwyn, Liang Bici & Wang Yupeng

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