

**RED
CARD**

RED CARD 2023

**CHINA DIGITAL
PERFORMANCE INDEX**

Published by



MAILMAN
An Endeavor Company



FOREWORD

Dear readers,

Welcome to the highly-anticipated 12th edition of the Mailman Football Red Card: China Digital Performance Index, recognising the digital performance of football teams, leagues, and players in China.

Firstly, a huge congratulations to Paris Saint-Germain, a first-time winner of the Red Card report. With the help of Messi and Mbappe, PSG climbed to the top spot, both players delivering stellar performances during the World Cup. Messi has also surpassed Cristiano Ronaldo as the number one player following his World Cup victory.

The English Premier League remains the top league, while the FIFA World Cup in Qatar was undoubtedly the highlight of the year. Douyin's broadcasting of the tournament was a milestone, attracting a huge audience and record fan engagement. Douyin made history by being the first short video platform to broadcast the World Cup live, and the results were astounding. The cumulative number of livestreaming viewers was an impressive 10.6bn.

Although Weibo maintained its position as one of the most critical platforms in China, with all 38 clubs part of the Red Card report having a presence, follower growth continued to decrease. Douyin retained its spot as the platform offering clubs and leagues the best opportunity to reach and engage a massive audience in China.

China Mobile's digital streaming platform Migu has become the home of European football, and there is more faith in its longevity compared to other platforms such as PP Sports, whilst short video platforms such as Douyin, Kuaishou, and Bilibili are increasingly active in acquiring live rights.

Bilibili purchased live rights to the FA Cup and pre-season tours, and is becoming an increasingly important platform, with four of the top five clubs in this year's report having a presence on the platform.

Looking ahead, the FIFA Women's World Cup is expected to generate even more interest across China, with the women's team, the 'Steel Roses,' having a genuine chance to make their mark.

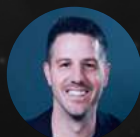
With the country opening up, we are thrilled to welcome the global football community back to China.

Finally, a massive thank you to the team behind the Red Card report, who have once again outdone themselves.

Onwards.



Andrew Collins
CEO Mailman



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PAST WINNERS



2023 WINNERS

#2



FC Barcelona

- | **2.3m** total Weibo engagement
- | **100k+** new followers on Bilibili
- | **10.7m** total Weibo followers

#1



Paris Saint-Germain

- | **1m** new Douyin followers
- | **21m** total Douyin engagement
- | **293k** new Weibo followers

#3















Chelsea FC

- | **500k** follower growth on Kuaishou
- | **15m+** total followers
- | **2.2m** total Weibo engagement



TEAM RANKING

		TOTAL	WEIBO FOLLOWERS	WEIBO GROWTH	WEIBO ENGAGEMENT	MINI PROGRAM / APP	DOUYIN FOLLOWERS	DOUYIN GROWTH	DOUYIN ENGAGEMENT	ECOMMERCE	SOCIAL COMMERCE	BILIBILI FOLLOWERS	KUAISHOU FOLLOWERS
1		57	3	4	10	0	9	12	11	5	0	3	0
2		56	11	3	12	5	9	1	8	0	5	2	0
3		48	11	2	11	0	8	5	6	0	0	0	5
4		47	10	1	6	5	4	2	6	5	5	3	0
5		42	12	1	10	5	4	2	6	0	0	2	0
5		42	5	1	9	10	4	2	3	5	0	3	0
7		41	5	1	12	0	9	3	9	0	0	2	0
8		33	4	1	3	5	4	1	4	5	5	1	0
9		31	6	1	4	5	2	1	2	5	5	0	0
10		29	4	2	2	5	2	2	1	5	5	1	0
11		28	5	1	3	5	2	1	1	5	5	0	0
12		27	4	3	4	0	2	1	1	5	5	1	1
13		26	4	1	8	0	4	2	4	0	0	3	0
14		25	4	1	3	0	5	2	4	5	0	1	0
15		23	2	4	2	0	1	1	2	5	5	0	1





PARIS SAINT-GERMAIN #1 in Red Card 2023

Image credit to CFP



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STANDOUT ACTIVATIONS



Manchester City

1 Moved up from 7th to 4th in this year's rankings thanks to the club's diverse digital presence in China.

2 An official Bilibili account, offerings for digital collectibles, and offline-to-online initiatives ensured Man City had their best performing Red Card position to-date.



A.S. Roma

1 A huge jump up to 15th for A.S. Roma, one of the highest climbers in this year's report.

2 One of a few clubs to focus efforts on short video platform Kuaishou whilst operating social commerce stores across the major platforms.



Bayern Munich

1 Celebrated 20th anniversary with Audi online; invited celebrity vloggers to team presentation day.

2 Collaborated with adidas for their kit launch with an online reveal as well as a Shanghai event.



WEIBO & DOUYIN SNAPSHOT



584m MAU
38 active clubs

1 Weibo saw an increase of 3% in their MAUs in 2022, with standout events such as the FIFA World Cup helping drive engagement. Many football fans used Weibo to keep up to date on the latest trends and watch content around the tournament. However, for football clubs on Weibo follower growth dropped significantly compared to 2021.

2 This lack of growth opportunities on Weibo saw clubs expand their presence on platforms such as Douyin and Bilibili. When comparing the follower growth of the top 10 clubs in this year's report to last year's, growth decreased by 85%. No club in the top 10 grew by more than 400k followers.



706m MAU
32 active clubs

1 Douyin retained its place as the platform that offers clubs and leagues the best opportunity to reach and engage a mass audience in China. It also doubled-down on football content in this FIFA World Cup year, sub-licensing the broadcast rights for the tournament. This was reflected in follower growth for the top 10 teams in this year's rankings, as growth during the FIFA World Cup was 10x higher than the average for the season.

2 Encouraged further creative collaboration between accounts, including a new function allowing multiple accounts to co-produce content that appears on both account pages, similar to the Instagram Collab feature. In 2022 we saw a rise of 24% of clubs on the platform compared to 2021.



BILIBILI SNAPSHOT



78% of Bilibili users are under 35 years old. Gen Z makes up a significant portion of this audience who spend on average 90 minutes per day surfing through long-form videos. The platform purchased the live streaming rights to the English FA Cup - the first time Bilibili has ever published live broadcast rights for a traditional sports competition.

To add to this, four of the top five clubs in this year's report now have an official Bilibili presence, with the platform set up perfectly for a year of continued success in the social media arms race.

Bilibili experienced significant growth in 2022 with their user base expanding to 333m MAUs in Q3 of 2022, a 25% increase from the same period in 2021. Bilibili's revenue also increased as a result of higher advertising and ecommerce sales, as well as successful monetisation of its content through virtual gifts and memberships.

Leading by example, the Premier League (355k followers) and Man City (290k followers) post a high volume of localised long form video content - a big challenge for Chinese football accounts post-Covid.



290k



277k



247k



239k

Bilibili Total Followers

*Data collected from January 1st - December 31st, 2022.



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FC BARCELONA

#2 in Red Card 2023

Image credit to CFP



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LEAGUE RANKING

RANKING



LaLiga



BUNDESLIGA



LIGUE 1



SERIE A

POINTS

50

32

20

20

11

TOTAL FOLLOWERS

9.02m

8.03m

4.22m

2.58m

387k

EPL's Dominance

- Continued dominance online in China with wins across a majority of the metrics
- Weibo engagement was 2x higher than the second most engaged league
- Douyin followers reached 3.6m, higher than any other European football account at the time of ranking

Kuaishou Presence

- Serie A became the first European league to launch on Kuaishou
- With less than 100k total followers since launch, Serie A will be looking forward to a stronger performance in 2023
- A Kuaishou-dedicated team will be required to tap into local insights and platform trends

Bilibili Battle

- LaLiga and Ligue 1 joined the Premier League on Bilibili
- A key platform to attract the Gen Z and Gen Alpha audiences in China
- Where pop culture thrives, European leagues have to be agile to react to new trends with original production



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PLAYER RANKING

"It's an honour to win the Red Card award for China social performance in 2022. Thanks to the Chinese fans that followed me throughout the year and shared the incredible moments together. I hope 2022 was a great year for you all and I really hope you enjoyed as much as I did"

2




Cristiano Ronaldo

36 Points

Kuaishou King

- Ronaldo continued his commitment to Kuaishou scoring maximum points with over 9m followers.
- Most popular video included original production around the Year of the Tiger and celebrations for the Winter Olympics.
- The next closest was newcomer Paulo Dybala garnering over 200K followers.

1



Lionel Messi

37 Points

Weibo Winner

- Messi's success was heavily driven by his Weibo performance, generating 50% more engagement than Cristiano Ronaldo over the calendar year.
- He was also the fastest growing with over 1m new followers on the platform, surpassing 8m in total.
- No surprises that over 80% of annual growth came in November and December.

3



Neymar Jr

33 Points

Douyin Dominance

- Neymar became most dominant on Douyin with over 6.4m followers, surpassing all other football stars to become the #1 most followed on the platform.
- Leveraged the CNY, combining sponsor Yili with local elements to create a viral video.
- David Beckham continues to grow in popularity on this platform with 3.3m followers.

CHELSEA FC

#3 in Red Card 2023

Image credit to CFP



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FIFA WORLD CUP FESTIVAL

The FIFA World Cup generates an unrivalled level of fan frenzy every four years in China. 2022 was no different, with records broken online across multiple metrics.

FIFA goes DTC

Ahead of the tournament, FIFA launched their own DTC platform, FIFA+ through the WeChat ecosystem. The China platform was built in line with the global product, delivering original documentaries, behind-the-scenes content, onsite production with Chinese KOLs and a series of games related to the tournament. Overall performance during the FIFA World Cup was 1.5x higher than the NBA during their Finals.



Douyin goes BIG

Douyin is leading the way for broadcast's leap from terrestrial to digital and now to social platforms. The short-form video channel sub-licensed the media rights from China Media Group to put on a truly social tournament. Their coverage included a series of influencers on the ground in Qatar as well as live studio shows from China. This resulted in a total of 230M total Douyin views of the final match.



Music meets Football

One of the most successful activations during the tournament was actually nothing to do with football. FIFA launched their #StadiumDJ campaign on FIFA+, allowing fans to select the songs to be played in the stadiums ahead of the final four matches. Featuring famous Chinese songs, the campaign tapped into rival fan groups each fighting for their favourite artists, creating a viral trend with over 160M reach.



Asia Pride

Chinese fans stood behind their neighbours throughout the FIFA World Cup. There was huge pride in seeing South Korea's qualification into the knockout stages, and as always, there was lots of discussion around Japan's fans clearing up at the stadium. Although the sentiment was positive overall, fans questioned why their own nation isn't at the level yet to qualify.



China at the World Cup

Despite not qualifying for the tournament, there was significant coverage of China's presence in Qatar by local media. Whether focusing on the four Chinese Commercial Affiliates and their stadium activations or products made in China, these were positive stories to be shared. Wanda benefitted from this extensive media coverage on their Flag Bearer program and the six Chinese children that walked out holding the flags at the final.



DIGITAL MONETISATION

China's digital landscape is establishing commercial extensions. The digital platforms have long been ahead of their Western counterparts in terms of monetising the fans, with federations, leagues and clubs increasingly adopting these practices.

Chelsea FC CNY Ecommerce

For Chinese New Year, Chelsea FC created a bespoke digital logo to celebrate the new year. This was imprinted on their official training jerseys, worn by players before a Premier League game and promoted through the club's record-breaking digital studio show in China.

Chinese fans were able to purchase the jersey directly through the club's online Megastore.

Paris Saint-Germain Live Stream

In the historic fixture against Saudi Arabia All-Stars featuring Cristiano Ronaldo, Paris Saint-Germain shared the distribution of this broadcast to Douyin.

The platform and club negotiated a revenue share model with hundreds of thousands of viewers paying RMB 5 (\$0.74) to watch the match live. For future iterations, the club could look to integrate video commerce to drive purchases of the team jerseys.

Inter Milan Digital Membership

Inter Milan utilised their mature China digital ecosystem to provide a bespoke China paid membership for fans, accessible through their WeChat Mini Program.

The season membership covers both child (RMB 99/\$15) and adult (RMB 199/\$30) tiers, as well as an innovative collaboration with Netease Music, which alongside the membership also offers VIP access to the Netease Music app for a year (RMB 299/\$45).

CONTENT EVOLUTION

In 2022, we saw European clubs and leagues innovating with new content types, moving away from an over reliance on graphics to evolve alongside emerging digital trends in China.



Live streaming

A number of clubs, led by Chelsea and Barcelona, utilised live streaming from stadiums before and after big matches to engage Chinese fans unable to travel to the games due to Covid restrictions. The live streams were often hosted by a Chinese fan reporter on the ground, and delivered an authentic taste of a big match atmosphere to their loyal fanbase in China.

BEST PLATFORMS



BEST CLUBS



Vlog content

Clubs and leagues created localised vlog content integrating a variety of influencers to promote club culture and engage new fan demographics. Bilibili is a natural home for such content, with functionality reflective of YouTube and Twitch. Juventus created bespoke content with Liu Yong, a prominent Bilibili food vlogger, to launch their account in November, hitting almost 3m views.

BEST PLATFORMS



BEST CLUBS



Short video

Short video platforms, led by Douyin and Kuaishou, became even more established in 2022, as clubs and leagues invested in creating localised and relatable content to their Chinese audiences. PSG were the highest engaged and fastest-growing club on Douyin, integrating trending music and copy into videos featuring their star players.

BEST PLATFORMS



BEST CLUBS



Gamification

With over 600m gamers in China, a number of football teams, leagues and federations have recognised the power of this community. During Chinese New Year UEFA gave away 6,666 prizes to fans through a gamified football competition on their WeChat Mini Program. Their ambition is to reach beyond football audiences into this gaming space.

BEST PLATFORMS



BEST CLUBS & ACCOUNTS



FAN FOCUS

Research methodology: The data gathered is from a report that analyses and summarises the characteristics, match-viewing habits, participation in football games, preferences in terms of football-related media content and football-related consumer trends of Gen Z football fans in China. This was achieved by means of questionnaires distributed among core Chinese football fans. The report information is based on public information and Mailman's analysis of sports fan data. There were 2k respondents in total.

Gen Z fans make up the majority of football fans in China

62%

of all football fans are made up by Gen Z



87%

of Gen Z fans are male



66.1%

Gen Z among all female football fans

Over 60% of fans play football every month



63%

of Gen Z football fans play the sport on a regular basis



37%

only watch football and do not play it



33%

play at least once a week.

57%

of Gen Z fans bought football-related memorabilia in the past year



10%

of fans spend more than RMB 5k (\$720) a year on football-related products



63%

of fans will not spend more than RMB 1k (\$140) on football memorabilia



Football-related consumer behaviour

Purchases no longer limited to football shirts

1. Football memorabilia, autographed jerseys and trading cards are highly sought-after.

54%

2. of fans think that social media interaction is an important way to support the team

26%

3. of fans will buy at least one jersey every season to support their favourite team



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MANCHESTER CITY FC #4 in Red Card 2023

Image credit to CFP



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Web3 Integration

FIFA World Cup 2022

The FIFA World Cup leveraged innovative technology to bring an elevated viewing experience to Chinese fans. All three official Chinese broadcasting platforms (CCTV, Migu, Douyin) utilised Web3 technology to provide new experiences to fans. CCTV used AR and AI technology for highlights, newsletter content and 3D virtual characters to provide voice interaction.

Migu launched a digital “plaza” for fans to interact, play and stream matches, as well as live virtual concerts. As Douyin provided a VR live match broadcast service for fans using Pico VR goggles, owned by ByteDance.



Man City CNY Campaign

Man City became the first European football club to launch digital collectibles in China, as part of their Chinese New Year campaign. Each collectible had 10,000 pieces issued, priced at \$3.60 each.

The club worked with the Topnod App and Topnod Alipay Mini Program, a digital collectibles platform, which combines purchase, collection, viewing and sharing based on its AntChain technology. Although there is no trading allowed yet under Chinese Government rules, this NFT platform is popular in China and operates with a Government permit.

Takeaways

Historically, the Chinese government has been strict on internet regulations and censorship, which may curb the adoption and development of certain Web3 technology within the country. However, China is leading the way in multiple smart-tech fields, thus it's reasonable to assume that local Web3 innovation will follow.

The Beijing government announced a two-year (2022-2024) metaverse innovation and development plan in Q4 of 2022. The plan will promote the development of metaverse-related industries in Beijing and establish it as a benchmark city for the digital economy.

SOCIAL BROADCAST

FIFA

The FIFA World Cup in Qatar marked the first time a short video platform has livestreamed a major football tournament, and it didn't disappoint. Douyin provided full, 4K ultra-high-definition free livestreaming broadcasts, with the cumulative number of livestreaming viewers reaching 10.6bn and the number of interactions between fans totalled 1.3bn. The World Cup Final alone attracted 230m viewers, with 37.06m peak concurrent users.



Kuaishou partnered with CCTV to be the official short video rights holder of the Olympics in China and ensure the recent Summer and Winter Olympics reached a younger and wider audience, providing live video & short video on-demand of the Games on its platform. The overall reach of the Games on Kuaishou resulted in 154bn in viewership and 300m in engagement.



The YouTube of China made its first foray into the livestreaming of sports through landing rights the the English FA Cup as part of a three-year deal. Free of charge and available to all, the ability to watch the most famous domestic cup competition was the catalyst for more European football clubs to then launch official accounts on Bilibili. Since then, we've seen a number of clubs broadcast their pre-season tour and friendly games for free on the platform.



The exclusive digital broadcast partner of the English Premier League in China - Shinai Sports - brought the league even closer to China through allowing fans to watch individual games free of charge on Douyin.

01 Social platforms double-down on live sports rights



2022 was the first year we saw notable investment by social media platforms in purchasing live sports media rights. This year we expect more viewership success and user acquisitions gained by Douyin, Bilibili, and Kuaishou through sports partnerships.

The sums are minor compared to the golden years of the heavy-spending LeSports and PP Sports, but they're enough to stabilise a fractured market and provide competition to the more conservative digital broadcast platforms.

02 China Telecom kicks on after tester year



The telecom giant entered the media rights circus tentatively last year, landing rights to F1 following Zhou Guanyu's seat confirmation. This year we expect them to provide more competition to rivals China Mobile, whose streaming platform Migu has become the market leader by some distance.

We're not expecting big bucks thrown at international rights, but something a bit closer to home, along the lines of the Asian Games, Shanghai Rolex Masters, and the Chengdu Summer World University Games.

2023 PREDICTIONS

03 Content creators enjoy more freedom



International rights holders have always been strict on access afforded to influencers and content creators in China, but that's changing. Global sports organisations have realised these important 'bridges' to their fanbase are the most effective way to engage current fans and reach new ones.

Not common practice in their home territories, yet the content creators in China are being given more access, more freedom to operate, and more power in how content is being delivered on owned channels.

04 Women's football's biggest year yet



The tournament is expected to supercharge the 'ShePower' movement sweeping the nation and driving a significant uptick in brand investment towards both the national team and grassroots women's sports initiatives across the country.

Alipay has set the bar high, promising RMB 1Bn over ten-years. In the wake of a three-year period of little-to-no sports events in China, the FWWC will provide a welcome respite for both brands and fans looking to pour their attention and national pride into a worthy cause.



ABOUT MAILMAN



Mailman is Asia's leading sports digital agency. We exist at the intersection of digital & sports. We help top sports organisations & brands to build sustainable businesses in Asia, one of the world's most challenging regions. Mailman is part of 160over90, an Endeavor company.

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