



电竞红卡

WINNERS ANALYSIS



STREAMING
PLATFORMS

邮人体育
7F

MOVERS & SHAKERS

电子竞技

2022 ESPORTS RED CARD

Produced by  MAILMAN
An Endeavor China Company

03

Foreword

04

Industry Snapshot

06

Team Ranking

07

Team Analysis

10

Digital Trends

14

Game Ranking

15

Brand Impact

16

Talent Popularity

17

2022 Predictions

CONTENT

Dear readers,

It was a tricky year for China's gaming industry, yet despite all this, revenues continued to soar to \$47B with China now representing over 26% of the global esports revenue. The headwinds included minors being restricted to 3 hours a week of game play in designated hours, and new game approvals being halted from April 2021, only just recently eased.

Yet there were moments to celebrate with local team Edward Gaming winning the League of Legends Worlds, despite PSG.LGD narrowly missing out on the biggest prize in Dota 2. We also saw the return of UZI in 2021 creating a frenzy online.

In our 2022 Esports Red Card Report, we showcase the growth of international esports teams online in China as well as other industry highlights. Congratulations to winners G2 Esports for their successful year as they became the most engaged team on Weibo and most followed team on Douyin.

Evil Geniuses were the biggest movers as the fastest-growing team across all Chinese platforms, whilst T1 Esports lost their place as the leading international team despite their dominant performance on Douyin and streaming platform Douyu.

The social media platforms embraced gaming with Weibo investing more into esports content, launching their own tournaments and teams. We also saw the return of international tournaments with live crowds, the League of Legends Worlds was the most consumed on Chinese social with over 107B impressions.

Thanks to the team for working hard on this report and we hope you enjoy.

Onwards.



Andrew Collins
CEO



\$47B

total gaming revenue
in 2021 - 26.7% of total
global revenue

666M

total gamers - 20.5% of
total global gamers

489M

total esports consumers
by end of 2021

3.4M

esports practitioners
by end of 2021

21K

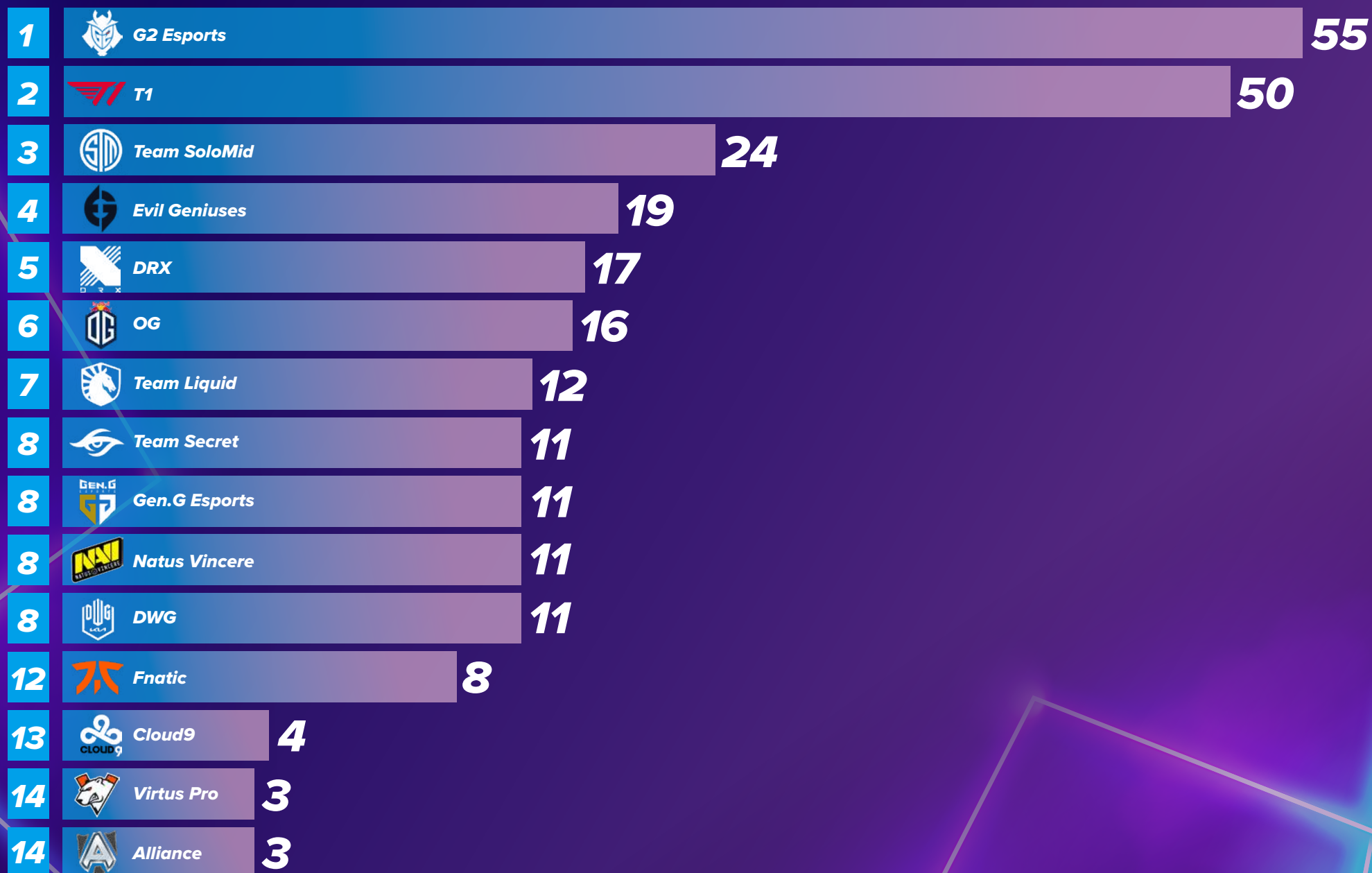
new esports companies
established in 2021

514M

total social engagement
in 2021



Image credit to Riot Games





G2 Esports

#1 most engaged and #2 most followed team on Weibo through their focus on the LPL and localised memes

#1 most followed team on Douyin with content featuring their players' daily highlights and comedy moments

Launched an online store focused on selling localised products and merchandise

#1 most followed team on Bilibili with 178k followers, having published more than 180 videos in 2021



T1 Esports

#1 most followed team on Weibo with over 250k new followers by utilising Faker's star power and LCK updates

#2 most followed team on Douyin, leveraging their strong performance at the Worlds to quickly grow

8.7M followers on their Douyu streaming platform, driven by daily streams by their LCK team and a clear focus on superstar player Faker

Continued promotion of their ecommerce store on Tmall with over 8K subscribers following their with new merchandise and special releases



TSMFTX

Team SoloMid

#1 most engaged team on Bilibili with 25% higher engagement than G2 Esports, driven by viral content around LoL players, Rainbow Six and Apex

Leveraged the selection of two Chinese LoL players into their roster with record engagement on Weibo

TSM opened an online store that is selling merchandise ranging from mouse pads to jerseys with local products at low prices

No presence with Huya or Douyu streaming platforms to build a closer relationship with esports community



#1 Evil Geniuses Climbs Rankings

Climbing five places to 4th in the rankings, EG was one of the biggest movers thanks to their specialist focus on Weibo and the launch on Douyin. The fastest-growing team with 800K new followers across all platforms and a 4x increase in engagement. The Douyin launch also brought new short-form content to their Chinese fans, whilst their partnership announcement with Wolves Esports further strengthened their local presence.



#2 EDG National Pride

Although not featured in the international team's ranking, EDG deserves a shout-out due to their historic year. Their success against DWG in the final of Worlds 2021 signalled a new era of China esports and acted as a catalyst for new investment and followers of esports. The impact was also felt online as EDG grew over 2M new followers on Bilibili.



#3 UZI Returns

After breaking the internet in 2020 with his retirement announcement, UZI shocked China's esports community after announcing his return to professional play after 895 days of retirement. This topic became the #1 trend on Weibo on the day he announced his comeback, with the hashtag #UZIComeback# reaching over 500M impressions and 31K mentions.



2022 LCK SPRING SPLIT
CHAMPION

WEIBO TARGETS GAMING & GEN-A

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10

Weibo remains the number one social platform for international teams to grow their brand awareness online in China. The platform itself underwent a shift in 2021 with the political landscape effecting change whilst their advertising revenue dropped significantly below other social platforms. This resulted in Weibo allocating increased resources to gaming and esports content, specifically across teams, talent and tournaments.



Weibo Most Followed Teams



Beyond its social platform, Weibo has significantly increased its owned tournament IP under the World Esports Games & Leagues (WEGL) brand. Weibo has also built its esports roster through the acquisition and management of local esports teams, including League of Legends, Peacekeeper Elite, Kings of Glory, Wild Rift and Identity V.

WEGL Weibo Cup Wild Rift: 32 teams competing for a prize pool of RMB 100K with Team Totoro winning the trophy, from November 18th to December 12th.

WEGL Weibo Cup Peace Elite: two 10-day tournaments across 2021 with 30 teams competing, Team STE won both of the championships.

WEGL Weibo Cup Honor of Kings: eight invited teams competed from June 21st to July 3rd, with Wolves Esports winning the championship.

VIDEO PLATFORMS BATTLE

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11

Throughout 2021, there was increased attention on the specialist video platforms to extend reach and grow communities. So far, there is double the number of teams on Douyin, with international teams favouring the platform due to lower production and management costs, as well as greater opportunities to extend reach beyond the gaming and esports communities. Bilibili still has an important role to play with its unique Gen Alpha audience, ensuring that teams can communicate directly with their fans through longer form video content and even live streams.



VS

bilibili

Teams Online

12

6

Total Team Followers

1.2M

382K

Total Team Engagement

106M

1.52M



DOUYIN WINNER



T1 Esports

Despite launching in 2020, it was only in 2021 that T1 recognised the potential of Douyin and significantly increased investment on this platform. T1 publishes unique short form, vertical content taken from their player streams as well as LCK in-game footage. They have also heavily featured star player Faker on this channel to accelerate growth around his profile.

128

total videos

466K

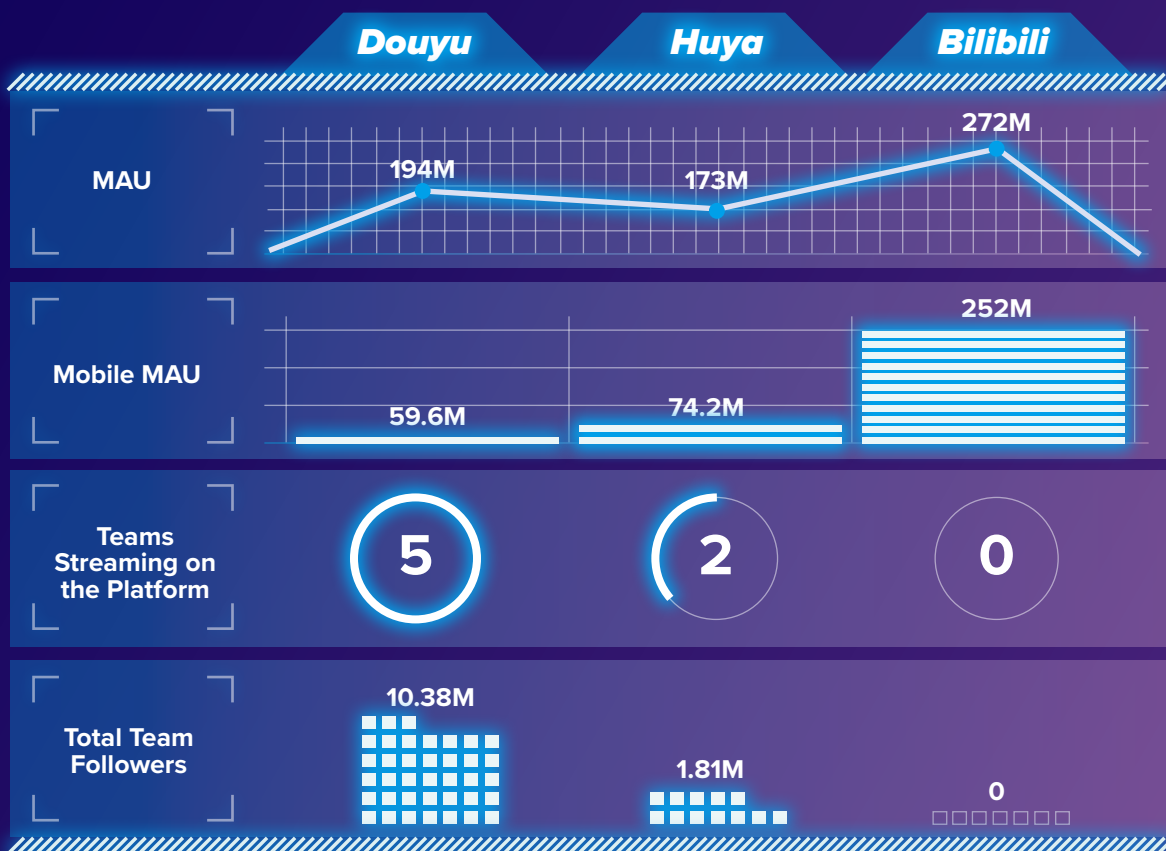
total followers

5.6M

total engagement



China's streaming platforms continued to evolve and identify their own unique focus in 2021, with Douyu, Huya and Bilibili competing for the gaming community's attention. Douyu currently has the most international teams and streamers on their platform. They have pivoted to attracting these top IPs due to limited rights fees available and the belief that individual talent is the biggest driving force behind attracting users. Meanwhile Huya and even Bilibili have begun to outspend their rival through acquiring the tournament broadcast rights. Whilst these tournaments are limited in quantity and have higher costs, they are peak moments in the esports calendar that drives viewers to their platforms and builds loyalty.



*Bilibili MAUs includes the VOD users also.



STREAMING WINNER








T1 has done an incredible job in growing over 8M followers on their Douyu channel, one of the most important platforms for growing brand awareness. The team has launched every player with their own streaming channel, including Faker, one of the most famous players in League of Legends to bring a complete experience for their fans in China.

10
total streaming channels

8.7M
total followers



2021 saw the return of esports tournaments globally with consumption online in China reaching record heights. These tournaments represent the pinnacle of fan following and provide a clear understanding of title & tournament preference of Chinese esports audiences.

PEL S2	League of Legends Mid-Season Invitational	Honor of Kings Autumn Split	League of Legends Worlds	Dota 2 TI10
				
April 30th - June 13th	May 6th - 23rd	Sep. 22nd - Dec. 25th	Oct. 5th - Nov. 6th	Oct. 7th - 17th
Winner	Winner	Winner	Winner	Winner
				
8.01M engagement	1.4M engagement	15.12M engagement	80.46M engagement	345K engagement
7.02M impressions	12.1B impressions	48.36B impressions	107B impressions	1.5B impressions

Mobil



They partnered with the LPL for 3 years, becoming the first engine oil brand to work closely with the tournament

Following this, Mobil, the US-based motor oil brand, announced its partnership with LPL team EDG and reaped the benefits after the team was crowned S11 Champion

Mobil activated their EDG sponsorship across all social channels with a unique hashtag campaign and launched an offline viewing party together on the final day of the tournament

TUMI



The luxury luggage brand sponsored the DPC Singapore Major with Chinese Dota 2 team iG securing a famous victory which helped TUMI gain significant exposure on streaming platforms and social

TUMI sponsored overseas team Evil Geniuses as well as announcing their partnership with PSG.LGD in October. PSG.LGD became the runner-up at Ti10.

They promoted their line of esports products by working with some of the biggest names in the LPL to co-produce video content shared across both channels

Hyperice



The US sports fitness company announced plans to provide physical therapy methods for LPL teams in a league sponsorship deal with TJ Sports, in which Hyperice was named as LPL's official recovery technology partner for 2021

Hyperice released their limited edition drops with LPL team TES which widely expanded their consumers from traditional sports to esports

They also set up a pop-up at the LPL arena and invited players to use their equipment before the game to demonstrate how it can help release muscle tension

Razer



LPL officially announced the Singapore-based hardware company would become one of the new sponsors and partners

Razer released their limited edition LPL products, including mouse pads and keyboards

They also have a number of successful partnerships with esports teams including EDG, JDG and HLE. But the most famous partnership was with Faker and a custom product line



管泽元
Guan Zeyuan

Guan is one of the most popular LPL commentators on social media with 6.84M followers on Weibo. Guan is not only one of the most famous LoL casters, but also the most versatile as he actively works in the basketball and football communities. In 2021, he worked with international brands including Mercedes-Benz, Acer, and L'Oréal.



米勒
Mile

Mile is a famous LPL commentator with 7.25M followers on Weibo. He has a very high reputation in the community due to his long-standing role in the development and growth of the league. In 2021, he worked with brands including Rémy Martin, Mercedes-Benz, and TUMI.



余霜
Candice Duan

Yu is a famous host for the LPL with 5.74M followers on Weibo. She's not only active in esports, but also is incredibly popular in the fashion world. With a positive image and diverse interests, she's worked closely with non-endemic brands including Swarovski, Dior, and Prada.



周淑怡
Zhou Shuyi

With 5.02M followers on Weibo and 10M followers on Douyu, Zhou is the queen of streaming. She started as an LPL commentator but quickly became much more famous through her streaming channels due to her unique style and appearance. She has worked with brands including HP and McDonalds.

Streaming Platforms Evolve

Huya was by far the biggest spender of tournament media rights in 2021, as they looked to build an ecosystem where all esports fans can find the tournament content they want. Meanwhile, Douyu shifted their strategy to focus on teams and streamers, believing there is a greater ROI in working directly with talent. This also includes international teams, with four already streaming on Douyu compared to two on Huya. With the merger officially rejected, we expect to see both platforms battle for new rights and become more creative, by even establishing new tournament IP with the world's best.

Asian Games Make History

Eight esports events will take place in this tournament which is going to be as close as it gets to the 'Olympic Games of Esports' with nations from across Asia competing with each other for medals and national pride - some things that are always close to China's sporting interests. This is also an opportunity for the esports world to attract more traditional sports enthusiasts through the games, as many brands look to leverage this period with tournament and gamer activation.

Virtual Avatars Go Mainstream

2021 saw virtual avatars become a mainstream phenomenon with sports rights holders and brands building their own. This subculture has grown from strength to strength and now presents a viable opportunity within esports and traditional sports space to drive new revenue. Live streams now feature virtual avatars interacting with real people, whilst brands chose to work with virtual avatars instead of celebrities to break through the noise and create unique marketing activations.



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

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