

520

MELBOURNE



**520 MELBOURNE REPORT
ENGAGING CHINESE-SPEAKING INTERNATIONAL
STUDENTS IN MELBOURNE'S ARTS AND
CULTURAL SECTOR**

We acknowledge the First Peoples and traditional owners of the land we now call Melbourne. We pay our respects to their Elders, past, present and future, on whose unceded land we live and work and celebrate the history and contemporary creativity of the world's oldest continuous living culture.

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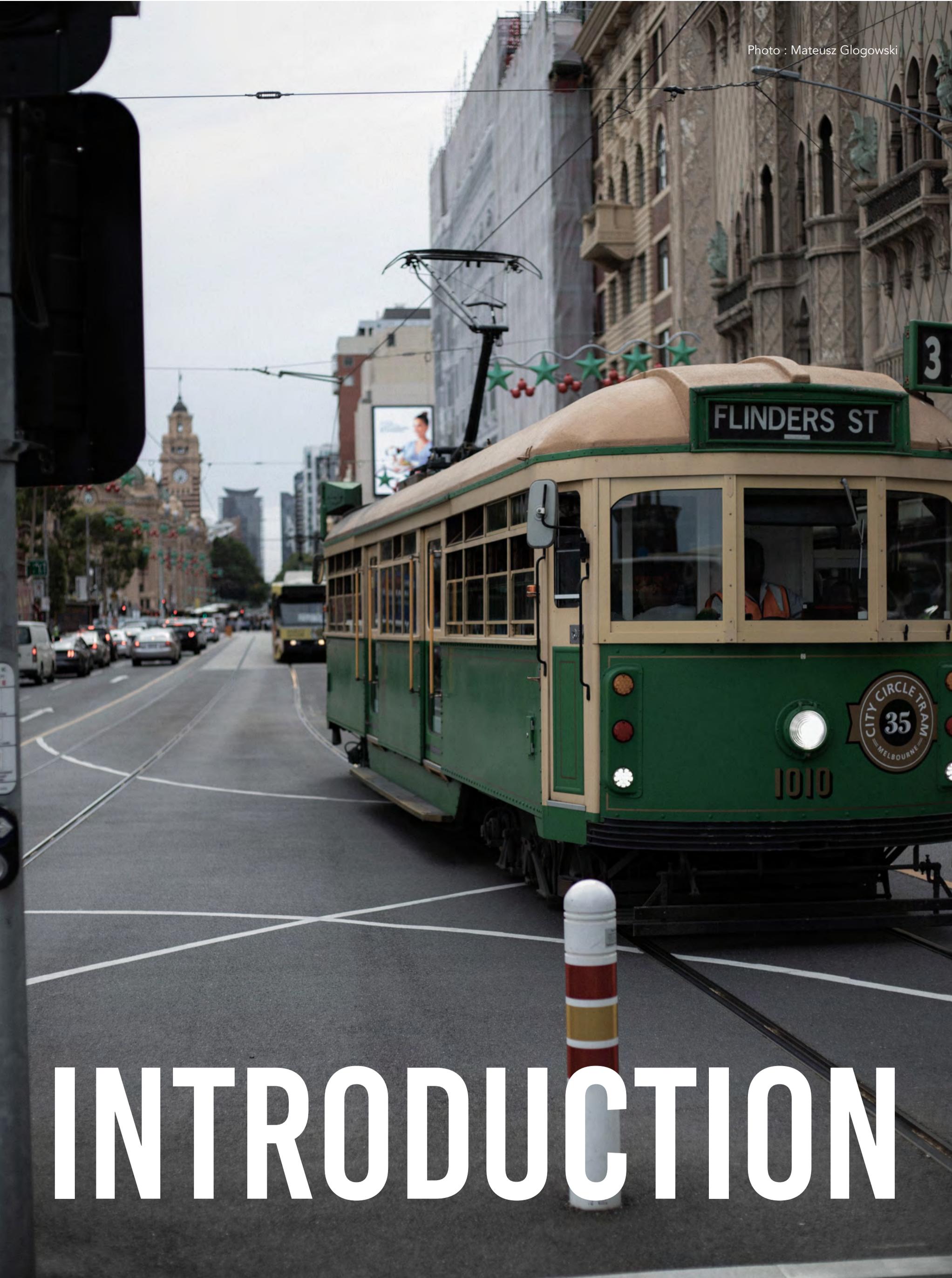
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INTRODUCTION

AUTHORS' NOTE

Why write the 520 Melbourne Report

The 520 Melbourne Report recognises the importance of Chinese-speaking international students, celebrates their affection for the city, and fosters deeper connections with Melbourne's arts and cultural scene.

Researched and written in Melbourne, the report has relevance for all those wishing to increase engagement with Chinese-speaking millennials.

The primary focus of the research is Chinese-speaking international tertiary students. The research approach included an online survey (633 respondents), in person focus groups (two three-hour conversations with ten participants each), an online focus group (one-hour WeChat conversation with more than 250 participants), consultation and interviews. 60% of survey respondents live in Melbourne CBD postcodes. All research was conducted between July - September 2019.

The 520 Melbourne Report is intended as a conversation starter.

We hope this report inspires institutions to make their own connections, involve more Chinese-speaking people in project teams, and talk to Chinese-speaking international students and Asian-Australian millennials about their cultural consumption preferences.

COVID-19 Context

520 Melbourne Report was written in 2019 and was due to be launched just as COVID-19 shut down Melbourne in March 2020. All data referred to in this document was gathered before the devastating impact of COVID-19 on both the cultural and international education sectors.

The importance of Chinese international students to Victoria's economic life has been starkly emphasised during COVID-19, as has the ongoing need for Victorian cultural institutions to remain relevant to diverse local audiences.

This cohort is a digital generation, which means they are even more relevant for cultural institutions that have made the 'digital pivot' during COVID.

Whilst the trajectory for both sectors is currently uncertain, we feel this report has increased relevance as Melbourne looks to recovery and growth in the future.

520 is Chinese online slang for 'I love you'.
To Melbourne and our student cohort... 520.

Kate Ben-Tovim, Wenona Lok and Tam Nguyen
November 2020

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CREATIVE VICTORIA

STUDY MELBOURNE





WHY SHOULD YOU GET TO KNOW THIS AUDIENCE?

International education has significantly shifted the demographics of Melbourne's central business district (CBD).

Pre COVID international students made up one in seven of the youth population of Victoria and one in five residents of the City of Melbourne¹. China is currently our largest source of international students, making up 31.5% of the student population in 2018².

Since 2016, Mandarin has exceeded English as the most commonly spoken language by residents of the City of Melbourne. Far more CBD residents identify themselves as Chinese (38%) than Australian (5%)³.

International education is big business for Victoria. It is the state's single largest service export, generating over \$12.6 billion and supporting 79,000 Victorian jobs in 2019⁴.

Yet despite Melbourne's thriving music, arts and creative sectors, the sector's low level of engagement with this cohort shows us that cultural institutions are grappling with understanding this exciting new audience demographic.

International students – together with recent graduates who stay in Melbourne after their studies, Asian-Australian students, and visiting family and friends – are an influential cohort of millennials active in the life of our city.

Although current student numbers are in flux, engaging this group in the life of the city makes undeniable cultural, economic and political sense.

Photo : Melvin Melvin

A QUESTION OF TASTE

The question of why audiences attend events (and what is most likely to appeal to them) is challenging to answer in absolute terms – a complex matrix of personal taste and peer preferences that audience members employ when making choices about their leisure time.

This is a cohort that likes to go out in Melbourne, that engage with arts and cultural activity in their home country, and that value events in Melbourne that enable them to meet new people.

Chinese-speaking partners or team members are invaluable in helping to navigate the nuance of cultural preferences and communications.

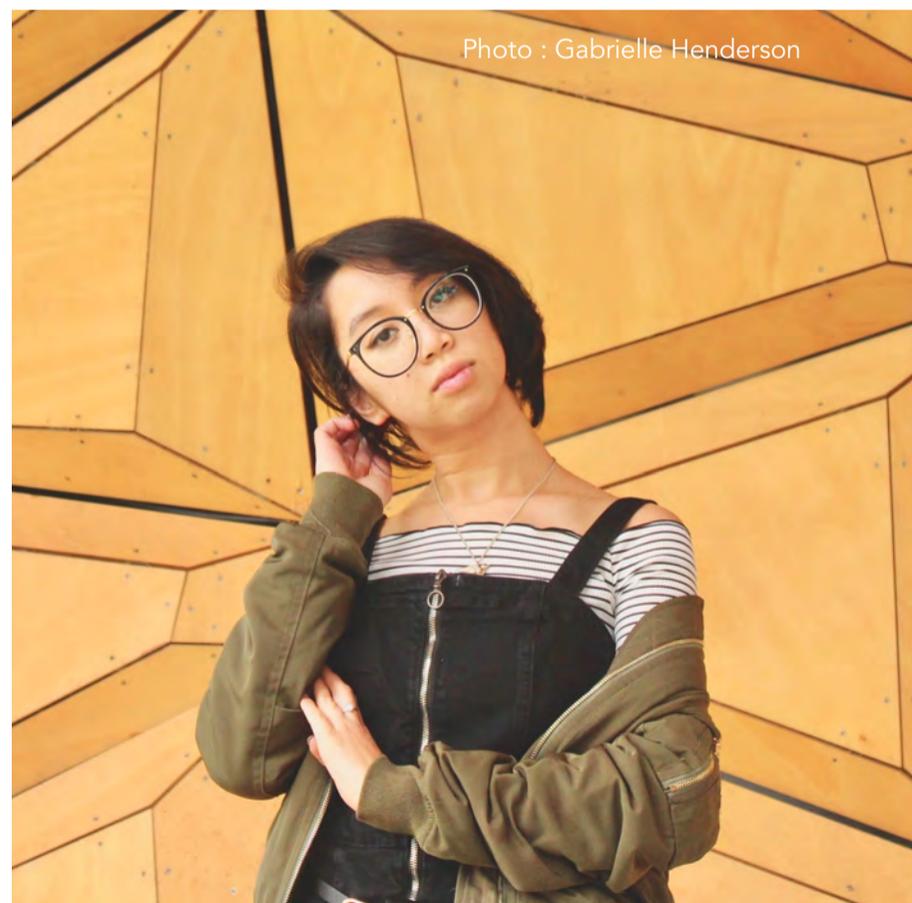


Photo : Gabrielle Henderson

IF IT'S NOT ON WECHAT, IT DOESN'T EXIST



Photo : Flynn Edwards

Understanding WeChat is essential to understanding this cohort.

WeChat is a semi-private, peer-driven social media platform. It is integrated into almost all aspects of daily life in China, including news and information sharing, social interaction, payment and administrative systems.

The vast majority of Chinese-speaking students arrive in Melbourne already part of the WeChat ecosystem. It's how many of them 'plug into' Melbourne life.

Students use WeChat networks to navigate the logistics of life in their new city and remain in active dialogue with their home country networks.

97% of survey respondents use WeChat every day. 84% engage with WeChat Moments every day (a private 'friends circle' similar to a Facebook timeline). 78% engage with WeChat Groups every day. Focus Groups supported this high interaction with WeChat.

Put simply, if it's not on WeChat, it doesn't exist.

WeChat is vital to any broader engagement strategy with this audience. Visibility via trusted networks is key to WeChat marketing success, and influencers – typically referred to as Key Opinion Leaders (or KOLs) – are key to dissemination.

QR codes (Quick Response codes) are widely used with WeChat in China. Using QR codes on printed and online materials is highly valuable when engaging Chinese audiences, providing an easy gateway to information and services.

Read more in the APPENDIX: UNDERSTANDING CHINESE SOCIAL MEDIA
section, page 27

KEY FINDINGS





These 520 Melbourne Report survey statistics are key to understanding how this cohort engage with information about activities in Melbourne

66% Do not engage with any Australian media - online or offline.

97% Engage with Chinese-language social media platform WeChat every day.

58% Are interested in attending more events but don't hear about them.

85% Find out about events online through social media platforms.

(58% specifically through Chinese-language platforms)



62%

Go shopping or hang out in retail malls more than once a week.

83%

Eat in restaurants more than once a week.



39%

Attend food festivals or events more than once a month.

36%

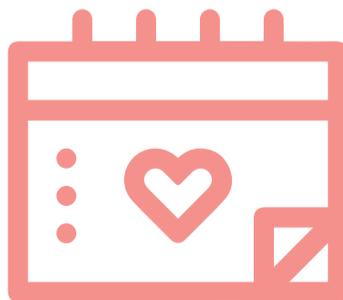
Attend exhibitions more than once a month.

29%

Attend pop events more than once a month.

LESS THAN 10%

Attend theatre, dance, comedy or classical music more than once a month.



Jump to the SURVEY FINDINGS section for more

The 520 Melbourne Report survey and focus groups consistently showed these factors as important influencers on their engagement with activities



In the city

This cohort goes out frequently, with the vast majority engaging with restaurants and retail outlets more than once a week.



On trend

This audience is highly trend focussed and keen to be across the 'latest thing'.



Brand affiliation

Having a well-known commercial brand on board can help this audience trust an otherwise unknown cultural institution or event.



Content familiarity

Entertainment trends that are popular in their home countries such as, gaming and eSports, Asian pop and Hallyu / Korean pop culture are appealing, as are globally famous or known 'on trend' artists.



Convenient timing and location

The audience prefers to attend events that do not impede exam study periods or times when they would be in their home countries. Events at easily accessible places via public transport are more appealing.



Social network driven

Finding out about the event via Chinese social media platforms and seeing it discussed endorsed via trusted networks using the platforms this audience is familiar with.



Inclusivity

Being made to feel welcome by an event or institution. This is particularly important as many international students feel isolated from broader university and city life.



Connectivity

The opportunity to make friends in a new country and outside of their immediate circle.



Validation

A special offer or student discount acknowledges their student status - which can be just as, if not more, important than the cost of the event itself.



Food offerings

Food culture is an important aspect of this audience's cultural identity.



Shareable

The experience being easily 'shareable' via social media.



Keepsakes

Having limited edition merchandise available adds priceless value to the event experience.

Dive into the CULTURAL CONSUMPTION PREFERENCES section for more

LOADING
ZONE
5 MINUTE
→

SURVEY FINDINGS

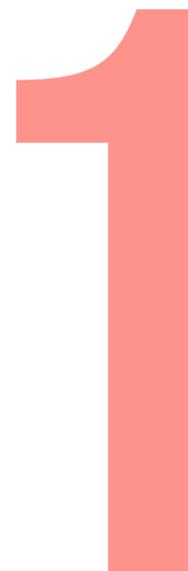


The cohort goes out frequently, with the vast majority engaging with restaurants or retail outlets more than once a week

83% of survey respondents eat in restaurants and 62% go shopping or spend time in retail malls more than once a week.

39% attend food festivals or other food related events (such as the Queen Vic Night Markets) once a month or more.

Focus group participants agreed that experiencing Australian culture and lifestyle was an important part of their time living overseas. This includes 'making the most' of their time here, sharing their experiences online, sightseeing, foodie culture, and going to festivals and events they can't experience at home (like certain musicals or the Australian Open). Many travel interstate a few times a year.



Most engage with arts and culture through attendance at food festivals and events, exhibitions and live music (pop).

Food festivals and exhibitions lead on engagement with this cohort, with 39% and 36% attending once a month or more respectively.

It is important to note that most focus group participants were unable to name any Melbourne cultural institutions except for the National Gallery of Victoria (NGV). As such, we assume the bulk of this engagement is with the NGV.

Live music (pop) was next most popular, with 29% of respondents attending pop music events once a month or more.

In this context, pop music can be understood as popular, mainstream or current contemporary music (without a particular sub-genre). Focus groups confirmed that pop was their favoured genre and they would like to attend more concerts, but noted that there was not enough of their preferred pop acts in Melbourne (in particular, currently trending Chinese acts and Korean acts).

22% reported attending music festivals and 12% indie rock/folk music events once a month or more.

Less than 10% regularly engage with dance, theatre, comedy or classical music.

Less than 10% of the cohort engage with dance, theatre, comedy or classical music. 25% of survey respondents reported attending none of the above activities.

The below graph (p.32) compares respondents' attendance at various events in Melbourne and their home countries. It demonstrates that the cohort's preferences in Melbourne closely match their preferences at home.

3

4

Musical theatre, indie rock/folk, dance, and comedy are genres for growth

Genres that the cohort would like to attend more of include musical theatre (32%), indie rock/folk (31%), dance (27%) and comedy (28%).

This is in addition to the genres that many of the cohort attend already– live pop (61%), food festivals (62%), galleries/museums/exhibitions (50%) – which they would like to do more of.

The majority (58%) are interested in attending more events.

Focus group participants noted that moving to Melbourne can be a lonely and isolating experience, commenting that it is hard to find out about anything (let alone events) until you meet people.

58% of survey respondents were interested in attending more events, but said they don't hear about them. 43% said it was important that events allow them to meet new people. 37% said events were too expensive. However, focus group participants noted that while unfamiliar artists or events were too expensive, price was not a barrier if the artists or events were more familiar or attractive.

5

97% engage with Chinese-language social media platform WeChat every day.

6

Online engagement (particularly on mobile phones) is highly prevalent with this audience in terms of social connection, content consumption and marketing reach.

97% of survey respondents are on WeChat every day. 84% engage with WeChat Moments and 78% engage with WeChat Groups every day. The next most common Chinese social media platform is Weibo (76% every day). And just under half of survey respondents use Xiaohongshu (aka Little Red Book) daily (48%). See the Appendix on Understanding Chinese Social Media for more information.

Popular non-Chinese specific platforms include Instagram (which 70% use daily) and YouTube (which 61% use daily).

Social media platforms are critical to this cohort's decision making, with 85% of people finding out about events online (58% specifically through Chinese-language platforms).

The influence of Chinese social media – in particular WeChat – cannot be overstated when it comes to engaging this audience.

CASE STUDY

THE IMPORTANCE OF WECHAT

National Gallery of Victoria

The National Gallery of Victoria (NGV) has been using WeChat for almost three years. NGV manage their own WeChat account, on which they translate and repurpose content they have developed for other English-language channels.

The NGV now has over 24,000 WeChat followers and consistently ranks among the top cultural attractions in the world in terms of engagement. Ongoing, regular communication and a continued effort to engage this audience is key to this success.

At the NGV, this effort has been embedded across the whole of the organisation – not just its marketing team.

This **organisation-wide approach** is based on listening to what makes a desirable experience for Chinese-speaking audiences.

For example, providing translated way-finding and audio guides in Mandarin, attractive dining outlets, and dedicated front-of-house strategies to make people feel welcome when they arrive.

The NGV **started with recognisable art and artist 'brands' as a point of entry**, and expanded from there. Dior or Van Gogh, for example, are names that resonate with audiences around the world. Creating accessible awareness campaigns and positive experiences around these prestigious 'brands' builds trust. Since 2016, Chinese visitation has increased from 6% of international visitation to up to 45% for major ticketed exhibitions.

The NGV also identified shareable content as an important part of this success. The cultural questions of 'who am I?' and 'who do I want people to think I am?' are important to audiences.

People want to share their experiences and the NGV's product is visually strong and engaging.

This was supported by focus group discussions in which participants reflected that they wanted to be seen to have their photo taken with Ron Mueck's work 'Mass' (2016-2017) or in the Yayoi Kusama installation 'Flower obsession' (2016-2017).

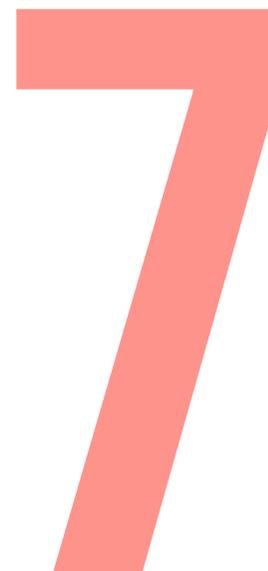
The NGV is working in partnership with Study Melbourne to provide international students with year-round opportunities to engage, meet other students and create a sense of belonging. Led by a student ambassador group, the program launched in the summer of 2019 with an inaugural event that attracted over 2,000 students. The NGV has since run a bi-monthly series of smaller events that focus on engaging with the NGV Collection and adding value to students' experience of Melbourne.

66% never engage with any Australian media (online or offline).

66% of respondents never consume any Australian TV or radio content, newspapers or student publications (either online or offline).

For the 12-14% of respondents that do engage more than once a week, they consume nearly equal amounts of TV (12%), radio (13%) and newspaper content (14%).

Focus groups noted that street advertisements – such as street/café posters, flyers or tram ads – were not noticed or used by the cohort. Many expressed frustrations that Quick Response (QR) codes are not used on the majority of Australian marketing materials, which is a preferred method of receiving event information.



'On-trend', famous or known artists are very important factors in the appeal of an event.

Results show that the cohort are most attracted to artists they know and/or artists that are popular amongst their peers. Respondents said that an event being 'on-trend' (64%) or by a famous artist (58%) was important to them.

Focus group participants unpacked this further. For actors and comedians to be considered 'on trend', they should be recognisable from popular online / TV / streaming platforms. For exhibitions, this means iconic 'brands' such as Dior and Van Gogh.

When asked if it was more appealing for events to have Asian artists or themes, the answers were more complex. Like any new audience, familiar content is a useful and perhaps necessary 'gateway' to forming a relationship with an unfamiliar institution or event.

While 40% of survey respondents ranked Asian artists as one of the important factors in deciding whether or not to attend, focus groups were not as definitive. However, aside from famous global musicians, the artists considered to be known, recognisable and 'on trend' were primarily Asian.



CULTURAL CONSUMPTION PREFERENCES

CULTURAL BACKGROUND

CHINESE-SPEAKING INTERNATIONAL STUDENTS

Due to the high cost of international education and living in Melbourne, the majority of international students at Melbourne universities are drawn from mid- to high-socioeconomic backgrounds.

This young audience is part of a growing mid- to high-net-wealth class of Asians who have disposable income to spend on luxury products and unique experiences.

Much of this group are part of the 'fu er dai' generation. Literally translated as 'second rich generation', this (often negative) term is used to describe the children of China's 'nouveau riche' who enjoy a privileged and comfortable lifestyle.

The group is very tech and social media savvy, communicating predominantly online via mobile apps such as WeChat. With mobile apps offering easy pathways for almost all aspects of daily life – from social communication to content consumption and e-commerce – there is little distinction between online and offline life.

The group is generally more progressive than previous generations, both in social values and lifestyle preferences. They are often described as luxury goods consumers, as brand status has particular value for this audience.

There is a strong appetite for what is 'cool' and new, as well as what can be accessed via social media rich content. The group is extremely trend focused, keen to be on top of the 'latest thing' and very quick to jump on trend bandwagons. They adopt trends very quickly and churn through them very fast.

English is not their primary language, and many have a social network (either in Melbourne and/or their country of origin) that they communicate with in their primary language on a daily basis.

ASIAN-AUSTRALIAN MILLENNIALS

While Asian-Australians were not the primary focus of the 520 Melbourne Report, they represent an important part of the young Chinese-speaking demographic in Melbourne and were included in consultations.

Chinese communities have been part of Australia for many generations. For the purposes of this report, we predominantly refer to the Chinese ethnic demographic from North and South East Asia whose families migrated to Melbourne in the late 1980s and '90s. The Asian-Australian children of these families were either born in Australia or migrated at a young age to complete a significant proportion of their primary or high school education in Australia.

Families often migrated to provide a better future for their children. As a result, these children have experienced a relatively prosperous upbringing and are now of university age.

These first or second generation Asian-Australian millennials are mostly bilingual – linguistically and culturally. Their cultural upbringing combines the Asian influences of their families' home countries and the Western cultural influence of growing up in Australia.

Many Asian-Australian students have strong family responsibilities that influence their leisure time behaviours. They are more likely to live at home during their studies than non-Asian heritage students⁵.

Education is highly valued across this demographic. Families may not prioritise arts attendance or participation except for educational purposes. As such, this demographic may not be as familiar with arts activities as other Australian cultural groups. Many represent the first generation of their families to prioritise spending on lifestyle or entertainment activities.

In general, Asian audiences are very community-driven. This means they tend to have close-knit social groups and seek to share information with their peers. This has strong similarities with the millennial generation, who like to share information about their lives on social media. As such, the drive for content sharing can be even more prevalent for this demographic.



THE DIGITAL GENERATION

This cohort love to be regarded as trendsetters. They like to be first at 'the new place' and to share where they've been and what they've done with their online community.

They achieve this through innovative use of new technologies – including mobile phone/app integration, advanced technology integration, gaming, virtual reality and alternate reality. This echoes trends in the Chinese entertainment industry.

To this digital generation, 'word of mouth' means hearing about events because they are discussed online by peers and Key Opinion Leaders (KOLs).

Respondents clearly expressed a preference for finding out about events online (85%) and for mobile phone ticketing services (88%).

CASE STUDY

PRESENTING CONTEMPORARY CHINESE SOUND ARTISTS

Liquid Architecture

Liquid Architecture is an Australian organisation for artists working with sound.

Liquid Architecture began to notice a larger section of young Chinese audiences at performances and events programmed by Associate Curator Mat Spisbah, whose work focuses on showcasing contemporary Chinese artists.

Liquid Architecture's engagement with this audience has been largely organic, as they have not chosen to interact with this audience specifically. However, due to the nature and social and cultural impact of the works they present, Liquid Architecture have noticed more and more crossover with this market.

As the organisation does not market directly via Weibo, WeChat or any form of Chinese social media, communication with this audience relies mainly on their artists' networks. As a result, Liquid Architecture has seen a large increase in engagement when **presenting contemporary Chinese artists with established Chinese networks**.

Straddling the worlds between music and contemporary art, performances and artists that have resonated with young Chinese audiences include: 33EMYBW, Rui Ho, Howie Lee, Pan Daijing and Tzusing. Partnering with other presenting organisations (such as Arts House, 4A Contemporary Centre for Asian Art and City of Melbourne) has helped Liquid Architecture reach a community that may not be aware of its work.

These organisational partnerships have also increased young Chinese participation due to the Chinese social media presence and networks these organisations have developed.

"As cross-cultural and intersectional audience engagement within the arts continues to rise in major Australian cities, there is undoubtedly many more connections to be made across communities, audiences and experiences within Australia"
– Mat Spisbah, Associate Curator, Liquid Architecture⁶.

BRANDS

Commercial brand integration can play a strong part in establishing a connection with international students and provide a trusted pathway for them to identify within an unfamiliar context. Having a brand on board is an extremely helpful way for this audience to trust an otherwise unknown cultural institution.

This audience views ownership and affiliation with designer brands as a form of social capital⁷.

Well-known commercial, fashion or entertainment brands signify quality.

Brand integration is a big part of the cultural offer this cohort experience in their home countries. They respond well to brands being associated with a product or event, especially if there is an exclusive, shareable, user-generated element.

CASE STUDY A TRUSTED BRAND Ultra Music

Ultra is a global electronic music festival brand, boasting elite DJs and a high-level experience.

Ultra was a co-promotion between a few Melbourne based event companies, TANG Events being one of the key shareholders.. TANG Events organise five regular 'Asian nights' at premium clubs across Melbourne, as well as one-off events across the year. Their primary audience is Australia's young Asian population, with certain nights targeted at various subsets of the Asian demographic.

TANG Events' knowledge of the Asian audience enabled them to position the Ultra experience for this audience, with a strong **emphasis on brand recognition and VIP experience.**

Ultra has brand recognition with Asian audiences due to its popularity in Asia gained through events in China, Hong Kong, Taiwan, Thailand, Singapore, Korea, Japan, India, Indonesia and Macau.

The first Australian Ultra was held at Sidney Myer Music Bowl in 2018 (to a sold out crowd).

Ultra 2019 was held at Parramatta Park (Sydney) and Flemington Racecourse (Melbourne), drawing over 43,000 attendees. Ultra 2020 expects to attract over 50,000 people.

By marketing to existing networks of TANG Events' Asian club-goers, the first phase Ultra of tickets predominantly sold to the Asian demographic.

Ultra's booking packages also offered an extremely top-end VVIP experience, which was predominantly taken up by Asian attendees.

POP CULTURE AND HALLYU

Pop culture is a significant factor when considering the preferences of this cohort.

Alongside China's own pop culture (C-pop), the influence of Korean culture – K-pop in particular, but also Hallyu culture more broadly – is substantial for millennials across Asia.

61% of respondents wanted to attend more live pop events, with focus groups confirming a strong interest in K-pop and Hallyu as a significant part of their popular culture consumption.

Written in Hangeul as 한류, the term 'Hallyu' was first coined by Chinese journalists⁸ to reference the wave of Korean pop culture that Asia started to take notice of in the early 1990s. Hallyu is now used to describe the export of Korean TV, movies, music, cosmetics and fashion, which began flowing over all of Asia during the 1990s.

While the commerciality of pop culture may make directly engaging with this genre unlikely for many creative industry players, it is worth noting the significant influence of pop culture in attracting this audience.

GAMING AND ESPORTS

53% of respondents reported playing online games more than once a week.

Gaming centres (LAN cafes) or online gaming from home play a significant role in this cohort's leisure choices.

Many venues in the CBD offer shared gaming facilities where students hang out. The biggest gaming arena in the southern hemisphere will open in Melbourne's Emporium shopping mall in 2020, with 200 seats across two floors. Facilities will include function rooms, a dedicated LAN lounge with 56 PCs, a full-service restaurant and two separate bars⁹.

eSports is a rapidly growing force in the entertainment industry worldwide. Alongside its phenomenal online audience (more people tuned into the online League of Legends finals than America's NBA finals in 2016¹⁰), eSports is now a major live event industry in Asia.

Live tournaments have become major events, with strong integration between the pop and eSports worlds through brand tie-ups, team sponsorship and festivals¹¹.

In 2017, Chinese fans of EDG (China's top League of Legends team) saw as many as 800,000 fans tune in for each of EDG's live-streamed sessions¹².

In 2019, Dota 2's annual eSports tournament, The International, was held at the Mercedes Benz Arena in Shanghai. This not only acknowledged the importance of the platform's Asian audiences, but that Chinese players and teams are now some of the most successful eSports players¹³.

19-year-old Asian-Australian Ana Pham was one of the winning team members at The International 2019, taking home a portion of the AUD\$51 million prize pool and becoming one of the highest earning eSports players in the world¹⁴.

eSports will continue to resonate with Asian audiences, especially in Australia, where the legitimacy of eSports has been increasingly steadily. The Australian eSports Association was formed in 2013 with the mission of getting eSports formally recognised by the Australian Sports Commission.

eSports Games Association Australia (EGAA) launched in 2017 to legitimise eSports in Australia and New Zealand. The Australian eSports fan base has more than doubled in the past two years (with 66% of those fans men between the ages of 18 and 34).

The growing demand for eSports in Victoria is evidenced through live events being organised around Melbourne. This includes:

- Melbourne eSports Open held yearly at Melbourne Olympic Park.
- A Fortnite tournament held concurrently with the 2019 Australian Open, with a prize pool of \$500,000 in cash and charitable donations¹⁵.
- As part of Melbourne International Games Week, PAX 2018 at the Melbourne Convention and Exhibition Centre, saw more than 200 exhibitors ranging from AAA game publishers to indie developers, PC and console brands, tabletop game makers, gaming schools and top tier tech hardware brands¹⁶.



TIMING AND LOCATION

43% of respondents reported inconvenient event times as a barrier to engagement with arts and cultural activity.

ACADEMIC CALENDAR

Students are more inclined to go out and have a good time at the beginning of their academic year, mid-semester or immediately after exams (before returning home).

Focus groups confirmed that March-April is a key time for socialising for those operating on a standard two-semester calendar, as students are back at university but the pressure for preparing for exams has not yet begun.

A few weeks into the start of second semester is also a good time (during August for those on a two-semester calendar), as many students return from their winter break and others begin their academic year.

Activities that take place in October-November align with students' end-of-year celebrations. However, it is worth noting that many international students travel home at the end of the academic calendar and/or during the mid-year/semester break.

11.11 SINGLES' DAY

The 11th of November (11.11) or 'Singles' Day' is China's biggest online and offline retail shopping celebration. Very popular with young people¹⁸, it is widely practiced across China and most countries in South East Asia.

In 2019, Alibaba's 11.11 Singles' Day drove USD\$38.4 billion in sales¹⁹, with USD\$13 billion within the first hour alone – double Amazon's estimated USD\$7.16 billion earnings from Amazon Prime Day 2019²⁰.

There may be an opportunity to tie marketing and promotion of arts and cultural activities into this retail phenomenon, particularly given retail brands' aggressive online promotion by retail brands space during the lead up to the event.

CHINESE NEW YEAR

Falling in January or February each year, Chinese New Year (CNY) is the most culturally significant celebration period for Chinese people.

Typically known as an auspicious period, CNY is a time of significant household expenditure and gift exchange¹⁷.

Much of the Asian-Australian community host family and friends during this time. Depending on when CNY falls in the calendar, many international Chinese students either travel back to their home countries or delay their arrival to Australia to spend the time with family at home.

Many events celebrate CNY within Melbourne's multi-generational diaspora and integrating a CNY message, theme or element into an event or marketing message can be a useful audience engagement strategy. However, it is advisable to get advice on the nuances of such alignment from a Chinese partner if looking to leverage this celebration.

LOCATION

A convenient event location is also important for engagement with this cohort, including locations that are easy or free to get to via public transport. 39% of respondents said that inconvenient locations were a barrier to engaging with arts and cultural activities.

Many international students live in or close to the CBD and do not own a car. Focus groups expressed a reluctance to spend money on taxis, which are typically more expensive in Australia when compared to their home countries. Events that take place in the city, or are easily accessible by public transport, are far preferable to this cohort.

Detailed instructions on how to get to an event location are appreciated and assist newly-arrived students to feel welcome at an event or institution.



CASE STUDY

CREATING AN EVENT TO WELCOME STUDENTS

Asia Pop Fest

In 2017, Arts Centre Melbourne and City of Melbourne presented the inaugural Asia Pop Fest. Asia Pop Fest 2017 (#APF17) incorporated the City of Melbourne's Lord Mayor's Student Welcome event with the introduction of a new music festival as part of the Asia TOPA program.

The event was deliberately scheduled in late March, after Orientation Week and the start of Semester 1. Understanding that timing is important to this audience, the date was selected to be early enough in the semester to not affect students' studies and to take place on Friday night so they would feel comfortable heading out to a leisure activity.

#APF17 drew more than 6,500 attendees. The event's primary audience was local and international Asian students, with key markets identified from China, South East Asia, North Asia and local Asian-Australians. 6,000 students attended the event for free and 500 non-students paid \$25 per person.

The line-up was strategically curated to appeal to these markets, including a headline K-pop artist (Ailee), a Singaporean-Indonesia pop singer (Nathan Hartono, who had recently been a participant on Chinese reality singing competition 'SingChina!'), a

Japanese vocaloid (virtual pop star) and a Singaporean singer (Charlie Lim, who had previously been a student at University of Melbourne).

Other activities included performances by local K-pop dance groups, on-stage gaming, a live broadcast by SBS Pop Asia, and student welcome stalls and activities. These added to the 'festival feel' of the event and enhanced the experience for students.

The event's varied promotional and marketing campaign also spoke to its target audience, through #APF17's online marketing strategy to engage audiences through platforms such as WeChat and Weibo.

Promotional materials were translated into Mandarin and messages customised to be relevant to this audience. The promotional campaign incorporated WeChat marketing elements familiar to this cohort, including QR codes, banners and articles.

#APF17 created a portfolio of bright, colourful visual assets that were on-trend with that period in time, including a promotional video and images of #APF17 branding and artists that could be easily shared on social media.

Thanks to his 'SingChina!' experience, Nathan Hartono was particularly popular with Mandarin-speaking audiences. This popularity was leveraged to gain attention for the event, which was then organically shared online from Melbourne to Asia and back again via the fans.

While online marketing made up only 10% of the overall marketing budget, over 90% of attendees discovered the event via online marketing means. The event trended nationally and internationally on Twitter (at #5 and #24 respectively).

By partnering with organisations such as City of Melbourne, Study Melbourne and various university clubs, #APF17 created trust and brand familiarity for its audiences. Even though it was a first-time event, there was sufficient brand recognition for students to feel safe and eager to attend. Partnerships with Asian food brands and other operators known to the market (such as TANG Events) added further legitimacy.

As a result of this success, the event will not only return for Asia TOPA 2020 but will be scaled up to a commercial ticketed model in partnership with a major music industry promoter.

SHARE, BUY AND EAT

SHAREABILITY

Shareable content is a key part of the event experience for this audience, with the majority of respondents (59%) noting that being able to photograph part of an event and share it online was important to them.

This frequent use of social media platforms serves both as a means of significant social connection and belonging, through communication with people in Melbourne and staying in touch with those at home.

Focus groups agreed that having a 'Melbourne' experience was something they were seeking while living overseas, and sharing their experiences of being in Australia – brunch, coffee, events – with peers here and at home was of value.

A SPECIAL OFFER

Value adding is particularly important to this cohort, be that through discounts, limited opportunities, exclusive merchandise or special offers.

This audience wants to be sure they get the most value out of an experience, regardless of its price point. They are attracted to offers or incentives that reinforce this.

Value adding can incentivise this audience to attend even if the content, venue or event is unfamiliar – addressing their low familiarity with Melbourne's events, artists and venues with their desire to experience as much of the 'Aussie lifestyle' as possible while they are living in Australia.

MERCHANDISE

42% of respondents said that merchandise is important as mementos of their experience.

For audiences in Asia, browsing and purchasing merchandise is considered an important part of a festival experience. Along with taking and sharing photographs, buying a souvenir is seen as an important memento of an event experience.

Merchandise can be a cost-effective way for a cultural experience to be valued and remembered by this audience. It can also act both as a way to supplement more traditional ticketing, food or beverage revenue while serving to enhance a cultural experience for young Asian audiences.

FOOD

Chinese-speaking international students experience Melbourne through its food, as reflected in the high percentage of respondents who listed eating in restaurants as their top leisure activity.

Food offerings were also valued as part of an event experience (42%), which echoes this strong interest in the restaurant scene.

Cafe crawling, having 'supper' or 'being seen' at on-trend wining and dining spots are embedded in this cohort's leisure time. They are also some of the least expensive ways to spend time with friends around the city, and a familiar concept given that food is integral to Asian culture.

Including a well-curated food element into an arts or cultural offering is a strong way to connect with this audience, and may serve as a 'gateway' to less familiar content or venues.

COMMUNICATION

WECHAT AND WEIBO

WeChat and Weibo are two of the largest social networking platforms in China.

They both exert significant influence in Chinese society and play an indispensable role in Chinese people's daily life.

The WeChat mobile app provides instant messaging services. Over 1 billion people use WeChat to send mobile payments, make video calls, play games, hail taxis, share their locations and more. WeChat uses QR codes for many of its in-app functions.

Weibo provides microblogging services equivalent to Facebook and Twitter combined.

Both WeChat and Weibo are very effective platforms to engage with Chinese audiences online. In promotional campaigns, it is important to utilise WeChat and Weibo together. But each is best suited to different communication methods and branding purposes.

WECHAT

97% of survey respondents use WeChat every day. But marketing to this audience requires a multi-pronged approach.

It's not as simple as paying for advertising space to push a product or event. The audience needs to know and trust a brand before they buy. As scams are quite common, brand awareness and recognition are essential and requires ongoing investment.

To achieve this, marketing campaigns often use the accounts of Key Opinion Leaders (KOL) influential in their own niche areas.

As WeChat is a semi-closed platform, interactions between KOLs and users are personal and targeted. WeChat users subscribe to content that they are interested in, so KOL accounts are a trusted source of knowledge and known to provide information and advice for their followers. Their audiences also tend to be more specific, which allows marketing campaigns to micro-target existing and potential audiences.

Many WeChat KOLs are considered experts in their fields. They produce informative and reliable reviews and comparisons so followers consider them trustworthy. They influence and facilitate their followers' purchases, with reviews often being paired with giveaway campaigns or links to an online sales page.

WeChat is further explained in the Appendix on Understanding Chinese Social Media.

WEIBO

Weibo has 430 million monthly user visits²¹ and user presence across 190 countries²². It is often referred to as the 'Chinese Twitter'.

While complementary to WeChat, users consume media within Weibo slightly differently. The interface is akin to microblogging, with posts limited by a number of characters at the first point of interaction, requiring users to click to read more.

Weibo is further explained in the Appendix on Understanding Chinese Social Media.

UNIVERSITY STUDENT CLUBS

University Student Clubs are an important part of daily student life, with language and ethnicity-focussed clubs in place at all Melbourne's universities – both at undergraduate and postgraduate level.

While the survey did not demonstrate large attendance at student club activities (21%), their importance as influencers on engagement with the city was widely acknowledged.

Student clubs interact with students on campus (particularly during Orientation Week when they are looking to recruit students) and via social media networks throughout the year. Peak organisations such as City of Melbourne and Study Melbourne engage with student club representatives throughout the year.

Focus group participants identified student clubs as an important source of information, especially when they first arrive and are looking for trusted resources to help them establish a peer group and navigate the logistics of life in a new country.

DIGITAL TICKETING AND INFORMATION

QUICK RESPONSE CODES

Quick Response (QR) codes are square barcodes that, when scanned with a mobile phone, provide much larger pieces of information.

Highly prevalent in China, QR codes are used by WeChat and other online platforms for a wide variety of tasks, such as linking directly to information, storing links, sharing business contacts, purchasing tickets or paying bills.

Using QR codes on printed and online materials is highly valuable when engaging Chinese audiences, as it shows an understanding of their preferred method of communication and provides an easy gateway to information and services.

CHINESE LANGUAGE OPTIONS ON TICKETING / EVENT WEBSITES

65% of respondents said that having Chinese language options on ticketing websites is important to them.

Not only is consuming content in Chinese a preference when it comes to leisure time, but the use of Chinese language indicates that an event is specifically targeting this demographic.

MOBILE TICKETING

Mobile phone ticketing is important to 88% of the cohort, both in terms of simple, mobile-ready ticketing apps and tickets that can be received and used on mobile phones.

Focus groups expressed frustration with complex multi-step online booking processes that require registering and validating email addresses (the cohort does not regularly use email) and lack of mobile online payment facilities (such as WeChat Pay).





APPENDIX

UNDERSTANDING CHINESE SOCIAL MEDIA

WECHAT

WeChat is a semi-private, peer-driven social media platform that is integrated into almost all aspects of Chinese daily life.

Since its launch in 2011, over 1 billion people now use WeChat to send mobile payments, make video calls, play games, hail taxis, share their locations and more. WeChat uses QR codes for many of its in-app functions.

Marketing to this audience requires a multi-pronged approach. It's not as simple as paying for advertising space to push a product or event. The audience needs to know and trust a brand before they buy. As scams are quite common, brand awareness and recognition are essential and requires ongoing investment.

Visibility via trusted networks is key to WeChat marketing success. To achieve this, marketing campaigns often use the accounts of Key Opinion Leaders (KOL) who are influential in their own niche areas.

As WeChat is a semi-closed platform, interactions between KOLs and users are personal and targeted. WeChat users subscribe to content that they are interested in, so KOL accounts are a trusted source of knowledge and known to provide information and advice for their followers. Their audiences also tend to be more specific, which allows marketing campaigns to micro-target existing and potential audiences.

Many WeChat KOLs are considered experts in their fields. They produce informative and reliable reviews and comparisons so followers consider them trustworthy.

They influence and facilitate their followers' purchases, with reviews often being paired with giveaway campaigns or links to an online sales page.

There are three main types commonly-used of WeChat KOL marketing:

- WeChat KOL Articles
- WeChat Groups
- WeChat KOL Banner Ads
- WeChat KOL Moments

WECHAT KOL ARTICLES

KOLs write articles in their usual style that include a focus on a particular product or event, using images of the product or event for illustration.

For instance, for Drake's Australian tour in 2017, KOLs framed information on Drake in the context of being Chinese pop idol Kris Wu's favourite artist. Articles include memes, screenshots of Drake's viral singles, gifs and information about his tour. Linking Drake with Kris Wu's large following created immediate interest from relevant users.

This customisation of information meant that readers were less likely to click away and more likely to follow the purchase links in the article.

WECHAT GROUPS

WeChat Groups are closed discussion forums that allow users to chat amongst friends or groups of interest. Ranging from of 3–500 users, group chats are commonly used by WeChat users.

For example, Melbourne creative company Imagikai use WeChat groups as a live chat option to communicate event updates, answer FAQs, and run online focus groups.

International Chinese audiences in Australia often provide feedback about the lack of Chinese-language helplines or guides. Using group chats can be an effective way to address this issue, and can empower other group users to help inform or support each other.

WECHAT KOL BANNER ADVERTISING

WeChat KOL banners are a visual call-to-action that generally consist of an image, heading and QR code.

Similar to Facebook and Instagram banner ads, these are placed strategically throughout KOLs' long-form articles. When clicked, they link users to a page containing additional information about the product or event.

WECHAT KOL MOMENTS

WeChat Moments, also known as 'Friends' Circle', is similar to a Facebook timeline.

As WeChat is a semi-closed network, users share and get access to information from people that they are close to, like family, friends or people with shared interests. This creates an intimate and private communication circle within each users' network. This 'private' platform encourages a high level of interaction and motivation to share.

Users of Moments take pleasure in sharing and receiving shared information. A 'sharing to Moments' function has been integrated into many other applications and websites.

Most Moments focus on sharing pictures with captions, status updates or websites. Selfies, food shots, travel scenery, essays, propaganda, notices and even rumours are also frequently shared.

When KOLs share on their Moments page, it creates powerful word of mouth to their personal networks.

Moments advertising is effective for marketing campaigns with visually attractive products or events.

WEIBO

Weibo provides microblogging services equivalent to Facebook and Twitter combined. Launched in 2009, it now has 430 million users visits every month²³ (based on 2018 figures). It is often referred to as the 'Chinese Twitter'.

While complementary to WeChat, users consume media within Weibo slightly differently. The interface is akin to microblogging, with posts limited by a number of characters at the first point of interaction, requiring users to click to read more.

As it is an open platform, KOLs' interaction with the audience is an indispensable part of marketing on Weibo. KOLs post regularly to keep a presence in their followers' feeds. Some post up to every hour or two, or three to five times each day. This continued high engagement ensures their brands are trusted as relevant and being 'in the know.'

Because of this fast-paced environment, information on Weibo changes frequently and spreads exponentially. Weibo is an important tool for brands that want to increase their exposure, build their brand image, and launch marketing campaigns with rapid and numerous updates.

CHINESE MUSIC STREAMING SERVICES

Commonly-used Chinese music streaming services (like NetEase or QQ Music) are not accessible in Australia, but many people access them daily through Virtual Private Networks (VPNs) that enable to them to stay connected with their home country networks.

This is significant in terms of the cultural preferences, as it means that audiences are less likely to know about artists that don't appear on Chinese streaming channels.

XIAOHONGSHU (LITTLE RED BOOK)

Xiaohongshu (Little Red Book) was founded in 2013, starting out as a platform for people to share shopping and product experiences while travelling overseas.

With the aggregation of more user-generated content, the service has transformed into a community for those who are passionate about overseas lifestyle and entertainment. With over 50 million users, it has now become a hub for sharing information as well as the world's largest community e-commerce platform.



Photo : Mitchell Luo

METHODOLOGY

Research and development of the 520 Melbourne Report was undertaken through a collaboration between two boutique Victorian cultural agencies – Turning World and Imagikai.

The report was commissioned by Creative Victoria and Asialink Arts and authored by Kate Ben-Tovim (Turning World), Wenona Lok (Imagikai) and Tam Nguyen (Turning World), with research and language support from Yixuan Shang (Imagikai).

RESEARCH APPROACH, DESIGN, DATA COLLECTION

ONLINE SURVEY

An online survey (in both Mandarin and English) asked respondents 24 questions about their preferred leisure activities, the cultural activity they consumed (and what they would like to consume in the future), and their communication, media and cultural content consumption and preferences. The online survey received 633 responses.

The survey was distributed via WeChat, university clubs and peak student body networks, Key Opinion Leaders (KOLs) and researchers' personal networks.

These distribution methods were based on advice on how to reach the largest number of Chinese-speaking students and increase survey return rates. However, we acknowledge the inherent bias that a survey distribution method distributed via WeChat will preference responses regarding preferred social platforms and frequency of usage to those who are already on WeChat.

We also acknowledge the online survey return rate was skewed towards students identifying as female (70%), which may be attributed to the attractiveness of the survey incentive offered (K-pop concert tickets) to female audiences. However, when male vs female responses were analysed, no significant differences were found.

FOCUS GROUP

In-person focus groups – two three-hour conversations with ten participants each, made up of current Chinese-speaking students and graduate students who now operate as Key Opinion Leaders (KOLs) or micro-media agencies.

Online focus group – one-hour WeChat conversation with more than 250 participants. The majority of this group had also completed the online survey.

CONSULTATION

Interviews were undertaken with leaders of peak student associations and university clubs in person and online. Researchers also drew on their personal networks and Key Opinion Leaders (KOLs) to test assumptions and gather anecdotal data.

CASE STUDIES

In person interviews were undertaken with key institutional personnel:

- National Gallery Victoria: Donna McColm, Associate Director - Audience Engagement and Learning; Jane Zantuck, Associate Director (Marketing)
- Liquid Architecture: Mat Spisbah, Associate Curator
- Ultra Music and TANG Events: Kenneth Ngov, CEO, TANG Events
- Asia Pop Fest: Wenona Lok and Kate Ben-Tovim, Co-Curators of Asia Pop Fest (who are also co-researchers and writers of this report)

ANECDOTAL EVIDENCE

The analysis of cultural consumption preferences, social behaviour and values are inherently challenging and subjective.

This report includes anecdotal material and personal observations from members of the target demographic where the authors felt that information represented information that was practical to readers.

ETHNICITY FOCUS

The 520 Melbourne Report focuses on Chinese-speaking audiences.

This corresponds with the large proportion of Chinese international students in Melbourne, who currently make up around 30%²⁴ of the total international student population.

The demographic breakdown of survey response included students from Mainland China (93%), Hong Kong (2%), Malaysia (2%), Taiwan (2%) and Singapore (1%).

UNIVERSITY CATCHMENT

Research for the 520 Melbourne Report focused on international students and alumni of five Melbourne universities: University of Melbourne, Monash University, RMIT University, Swinburne University and Deakin University.

The rationale for this selection was that each university has a high percentage of international students and strong student associations that are a major organising force of student social life. There was also an assumption that students at these universities would live in or close to Melbourne's CBD (or have easy access to the CBD or inner suburbs), giving them the greatest possibility for engaging with inner-urban cultural activities.

Students attending TAFEs or technical colleges were not included as a focus of this report.

AGE AND SUB-CULTURAL DEMOGRAPHIC

The target age group was 'young millennials' between 17-25 years of age.

Within this age range, the report focused on two audience groups:

- Chinese-speaking international students who have lived in Melbourne for between 1-6 years (defined as international students).
- First or second generation Asian-Australian students who are mostly bilingual with significant Asian cultural 'upbringing' or former international students who chose to stay in Melbourne after their studies (defined as Asian-Australian millennials).

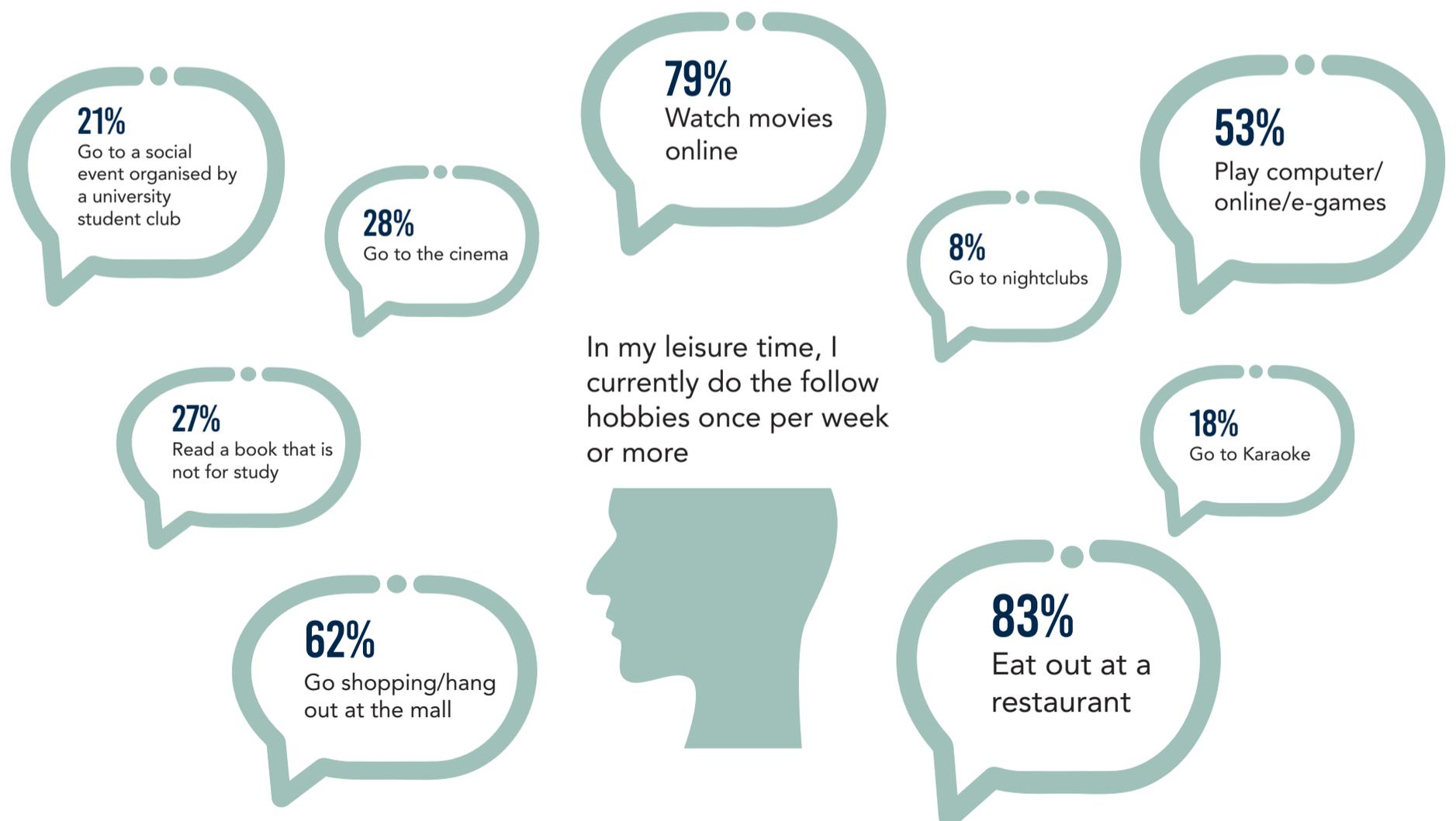
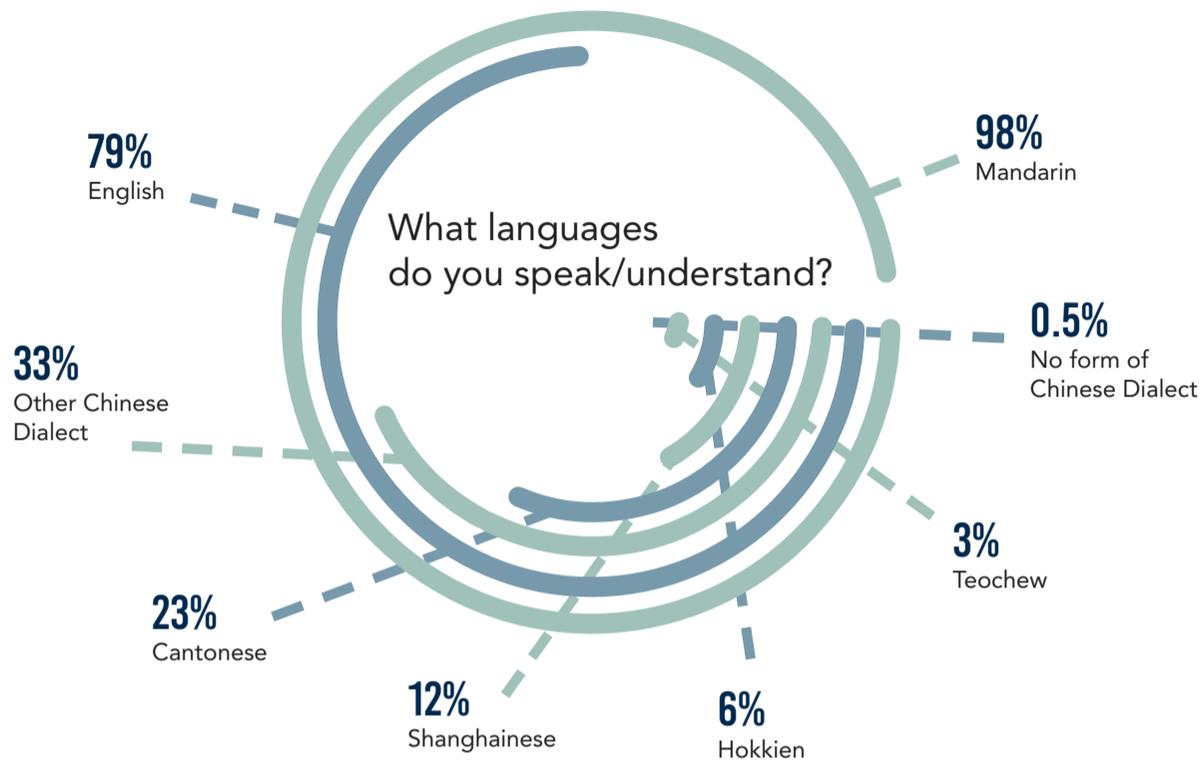
The majority (88%) of online survey responses were made by Chinese-speaking international students. Only a small minority (12%) came from Asian-Australian millennials (either those born in Australia or living in Australia for more than 6 years).

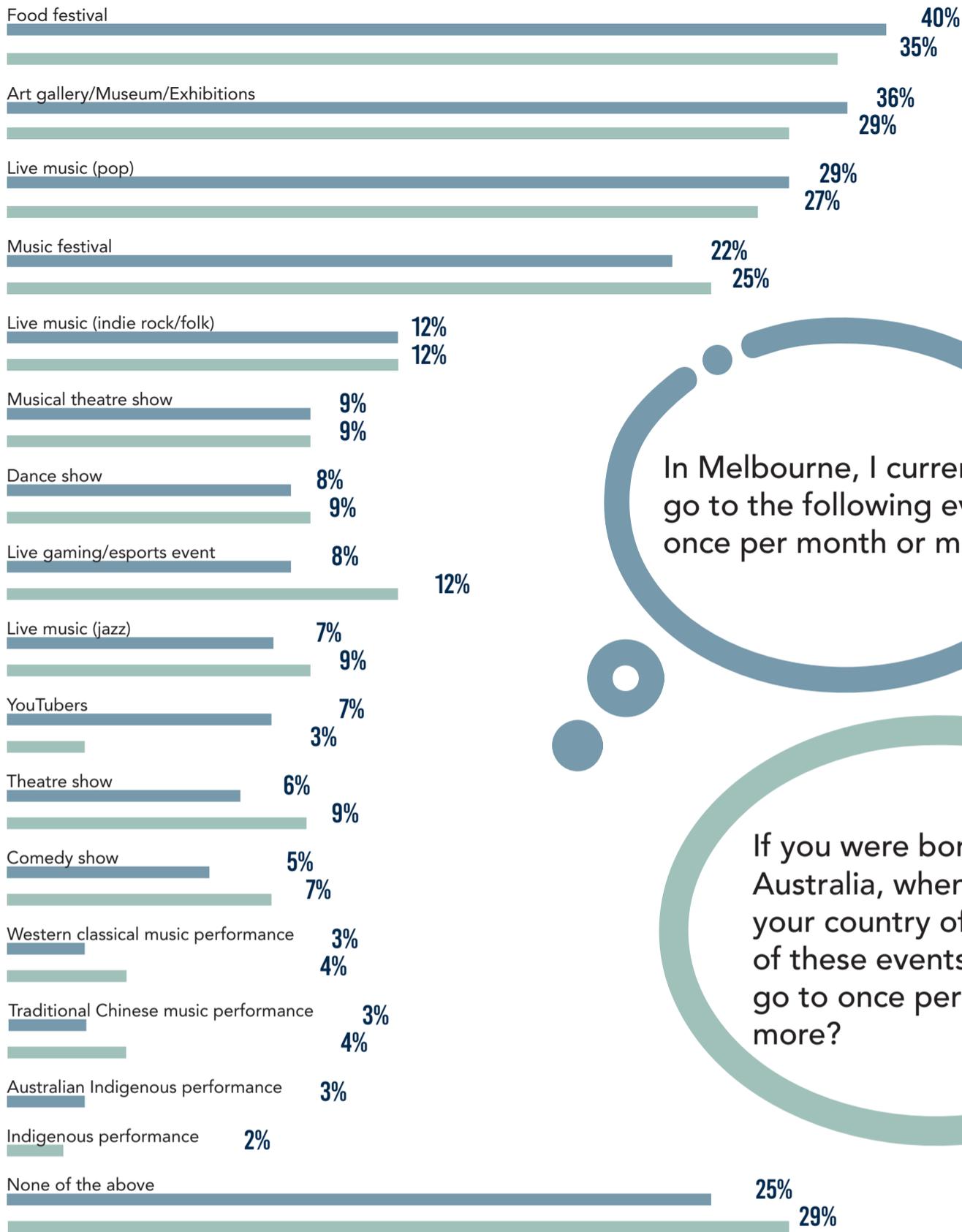
Photo : Linda Xu



SURVEY RESULTS

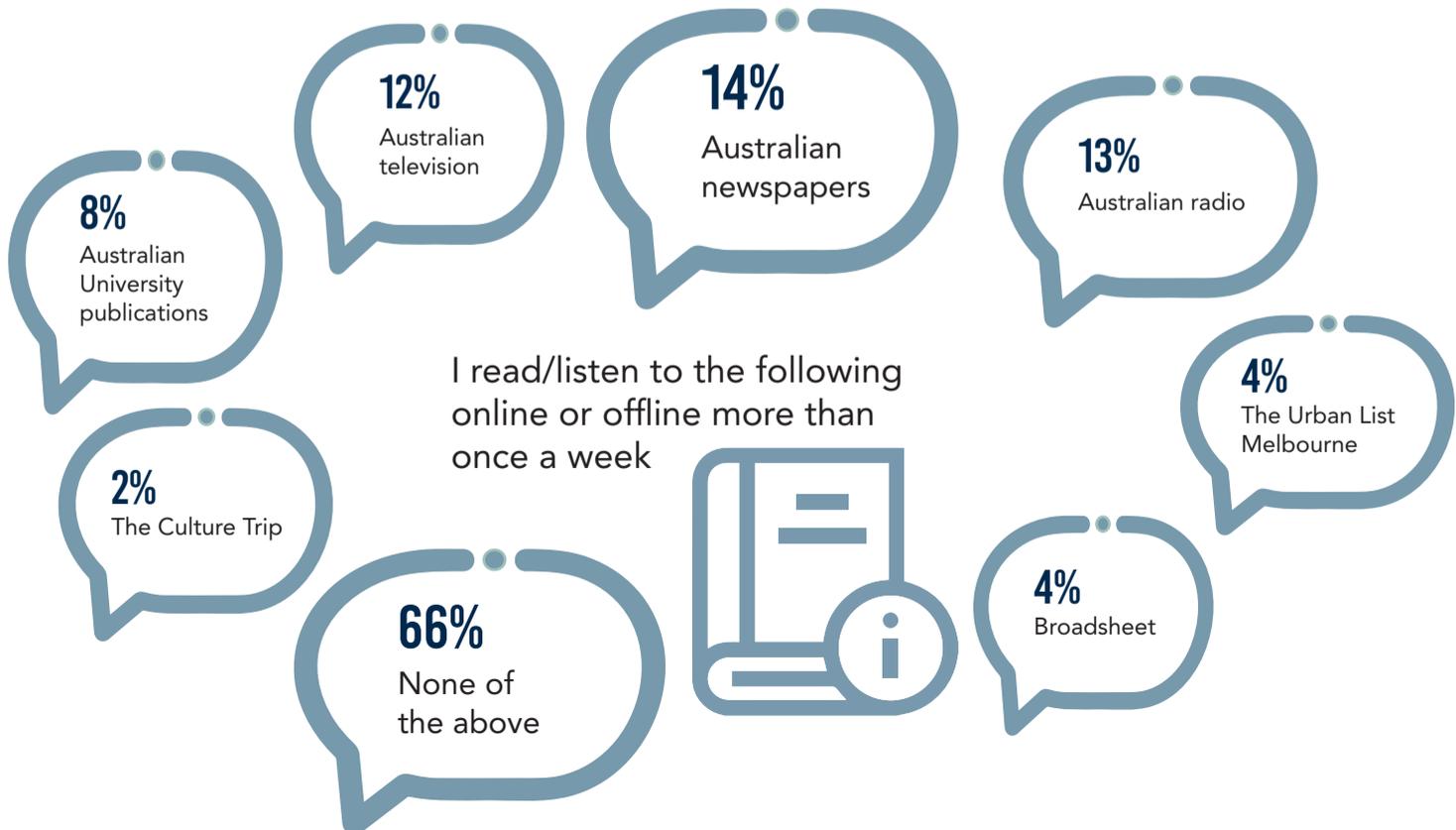
The following results are conducted from 633 participants.
Data was gathered in August 2019.

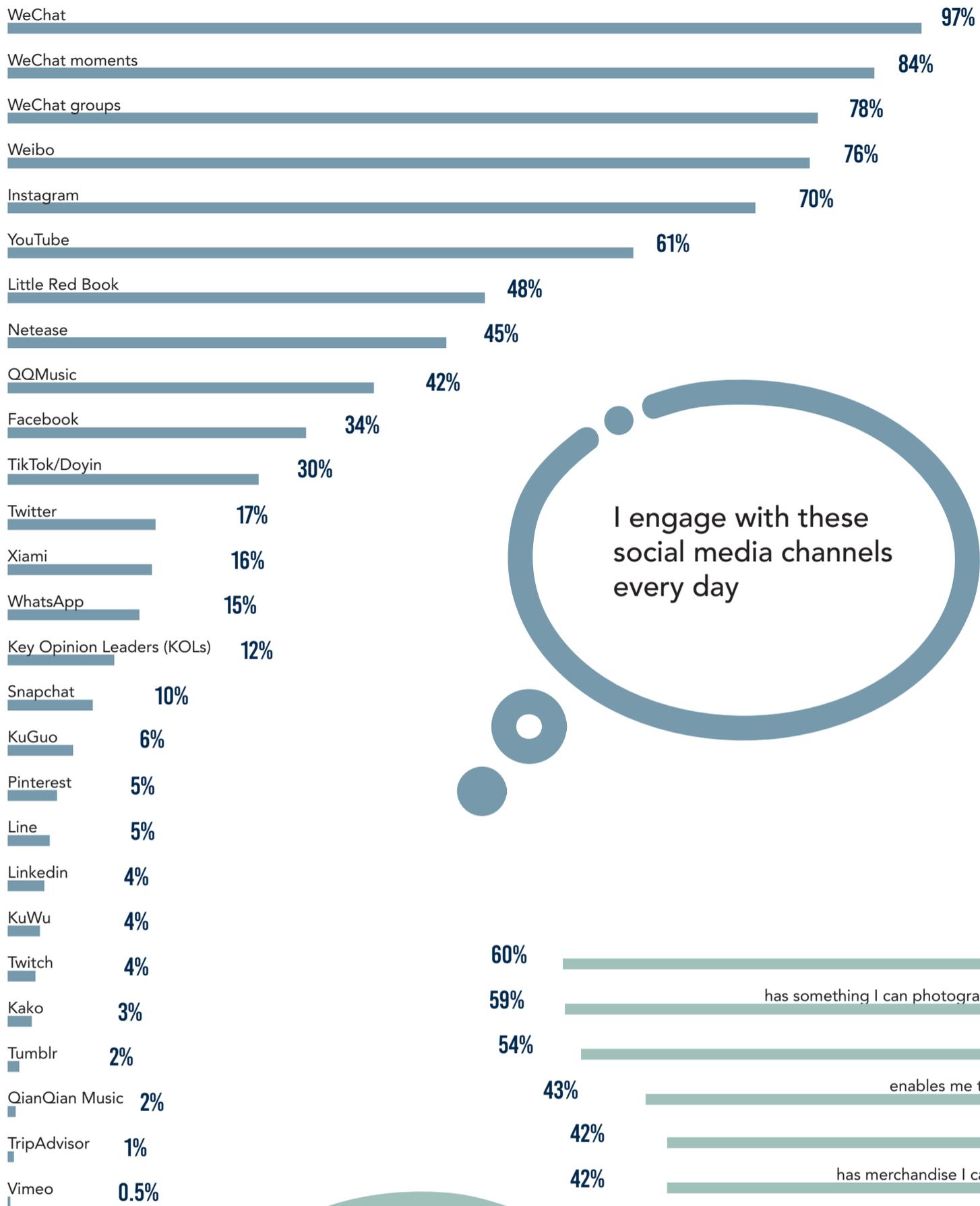




In Melbourne, I currently go to the following events once per month or more

If you were born outside of Australia, when you lived in your country of origin which of these events did you go to once per month or more?



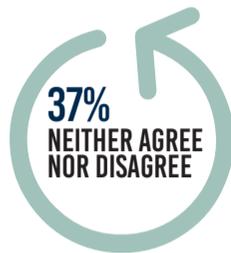


I engage with these social media channels every day

It is important to me that an event



I find out about upcoming events in Chinese

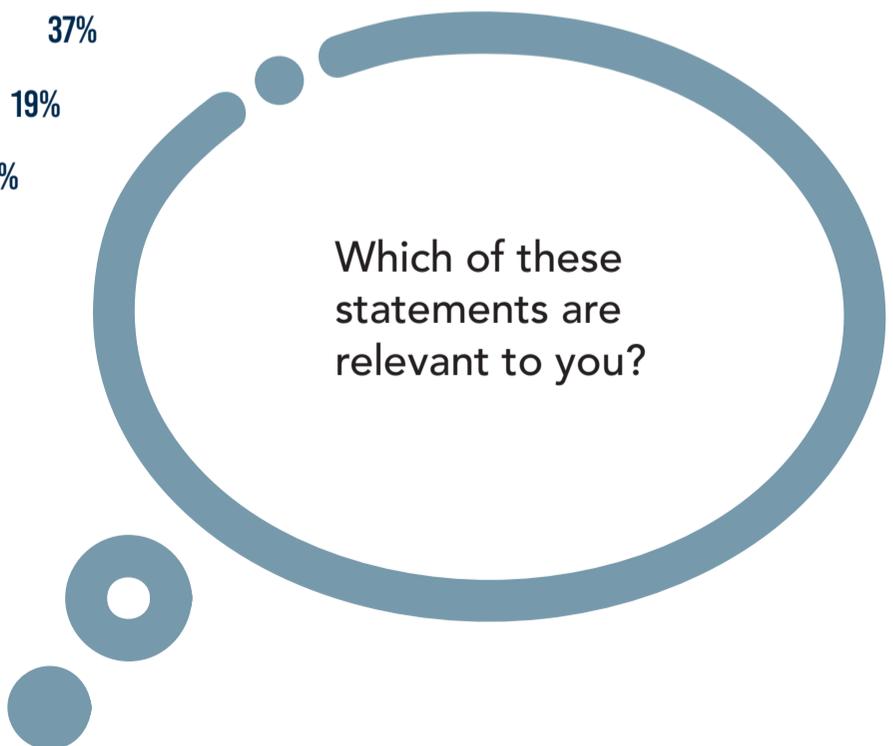
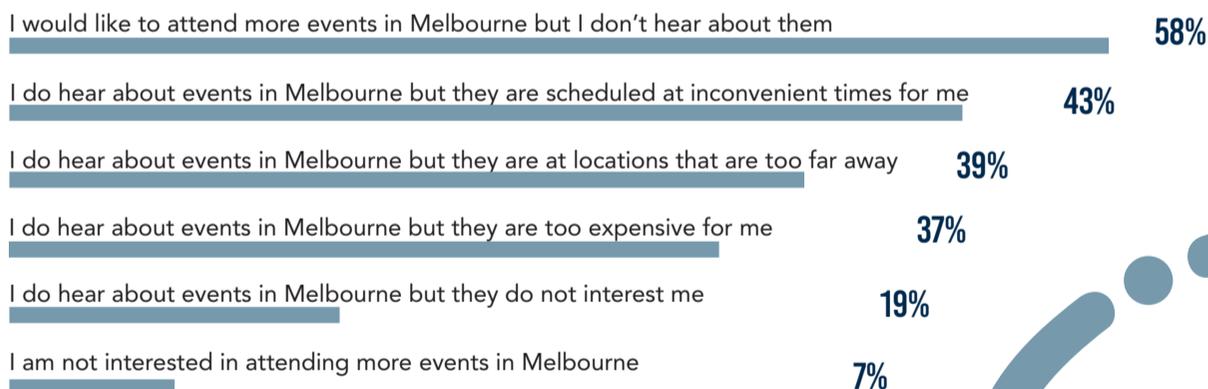
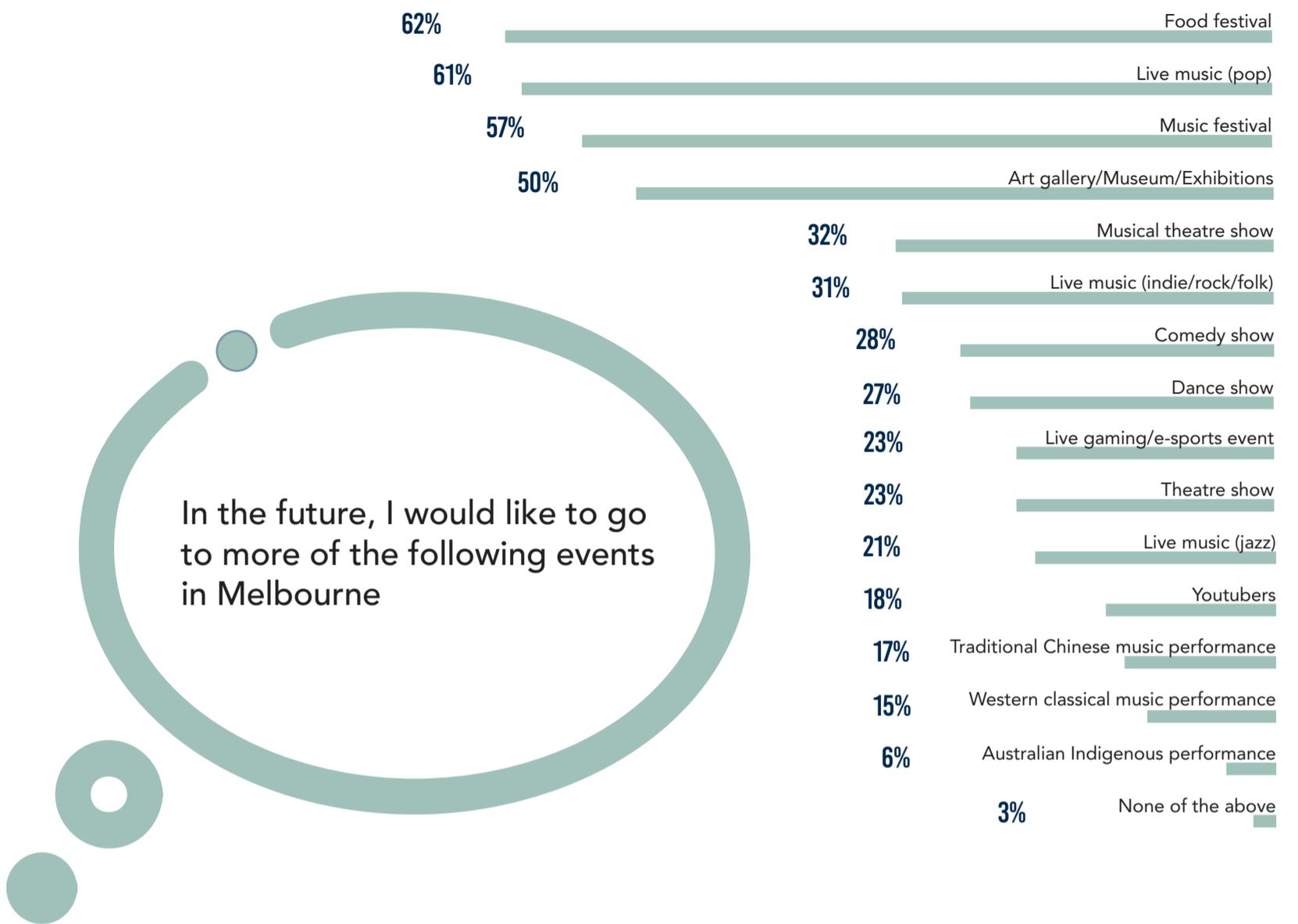


I always find out about events online



KOLs and/or Instagram influencers are important when I decide what to do with my leisure time



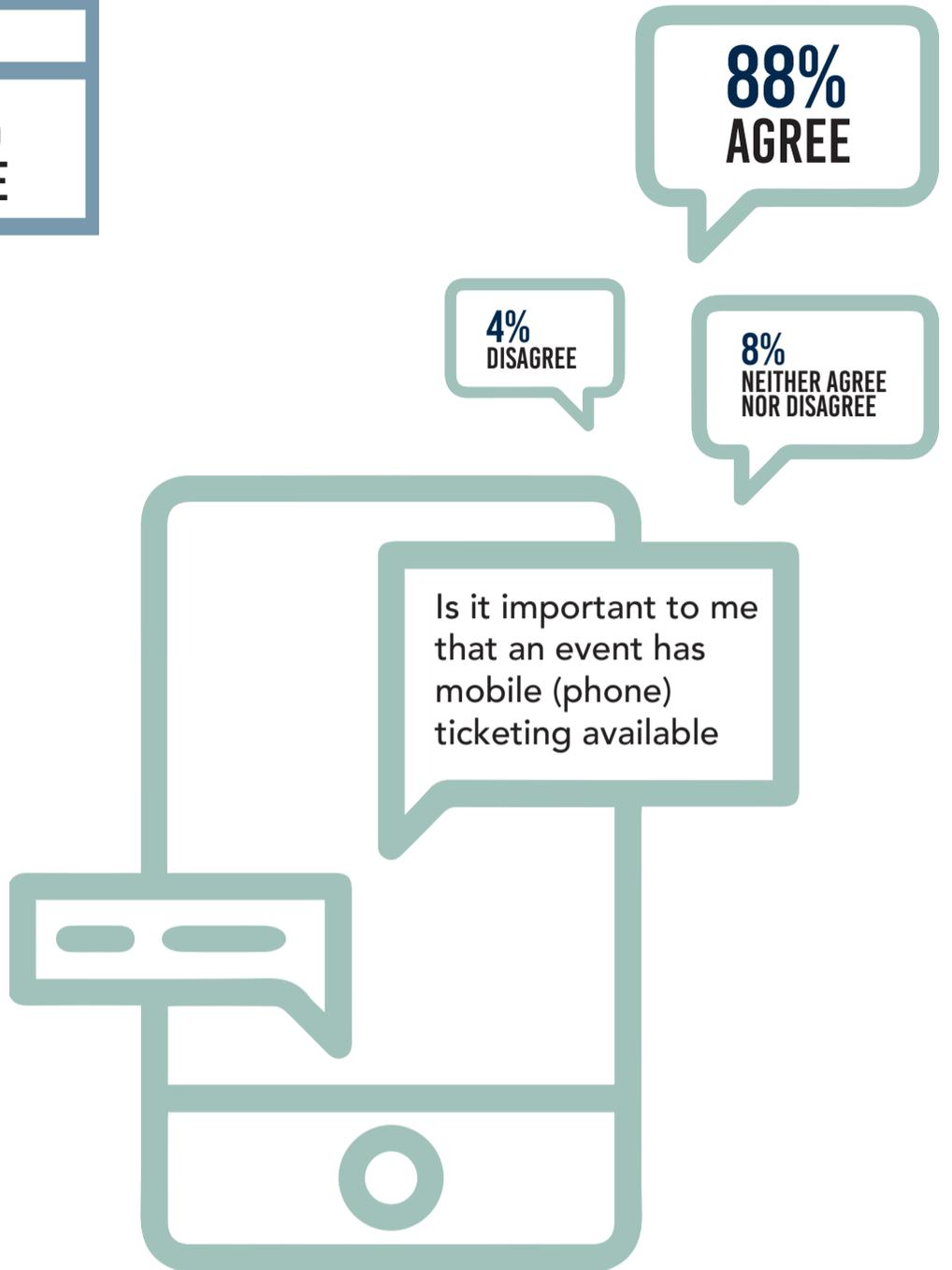




22%
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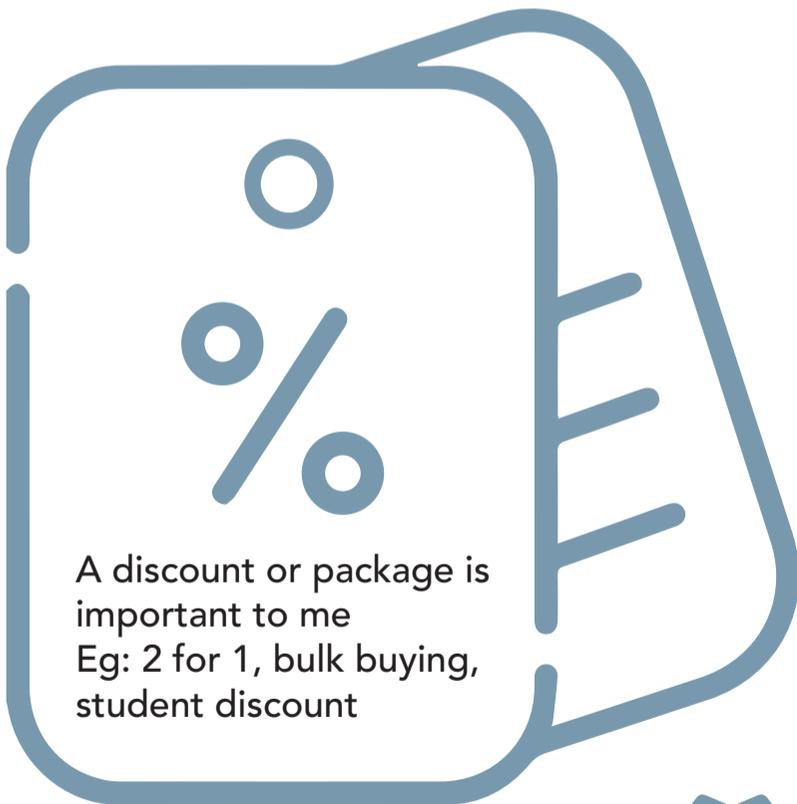
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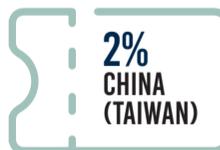
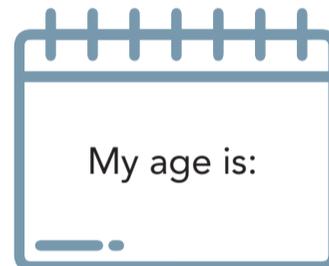
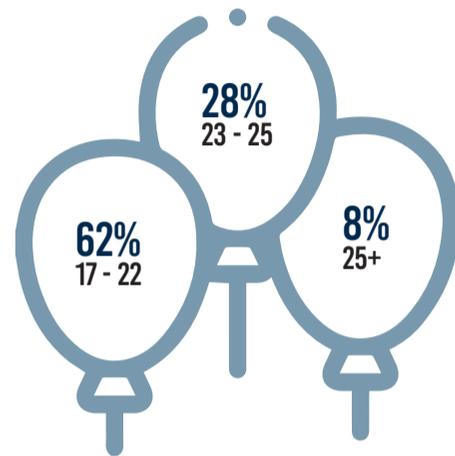
8%
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NOR DISAGREE



80%
AGREE

5%
DISAGREE

15%
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FOOTNOTES

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ABOUT

ABOUT THE AUTHORS



KATE BEN-TOVIM

Kate is a curator and producer specialising in engagement with the Asia-Pacific. During her 20+ years in the arts, Kate has worked with artists, cultural institutions and governments in Indonesia, India, China, PNG, and throughout Australia.

Kate was Associate Director of Asia TOPA, a large-scale festival of contemporary Asian performance and new work commissioner. She is Founding Director of Turning World.

Kate was based at the Australian High Commission New Delhi for 20 months as Co-Creative Director of Australia's largest cultural diplomacy initiative in India, Oz Fest 2012, and lived in Jogjakarta for a year in 2009 on an Asialink Arts Management Residency. She has curated Asia-Pacific focussed programming for the 2018 Commonwealth Games, 2015 White Night and the 2012 London Cultural Olympiad. She has also worked in producing/senior management roles for numerous Australian festivals and arts organisations, including Melbourne Festival, Arts House, Melbourne International Jazz Festival and Adelaide Festival.

Kate has an ongoing commitment to working with Indigenous artists. She was the first producer of The Black Arm Band and has produced Indigenous festivals and events in central and northern Australia.

Kate's awards include a Sidney Myer Creative Fellowship, DFAT Secretary's Citation (Oz Fest), Greenroom Award (Curatorial Contribution - Asia TOPA) and an Asialink Residency. She has produced numerous Helpmann Award winning productions and is a regular public speaker nationally and internationally.

Wenona has deep experience working with Australian and South East Asian markets, specifically in music and trade industries. She is an audience development consultant and her expertise includes producing events, digital marketing, public relations and business development.

Wenona's experience in the Asia Pacific include managing over 55 music tours, which have attracted over 650,000 attendees. She has also been instrumental in the brand development of many digital talent in the Asia Pacific region.

Wenona established Imagikai, a boutique creative agency that specialises in engaging with the local and international Asian audience in Australia through consulting, events, PR and marketing services. She advises and supports entertainment organisations on their Asian pop strategies in Australia.

In 2017, Wenona curated and organised the inaugural Asia Pop Fest, presented by Arts Centre Melbourne and City of Melbourne.



WENONA LOK



TAM NGUYEN

Tam has over twenty years of experience in large-scale festival management, film, and the performing arts sectors in the UK, US and Australia. Tam is Director of Turning World.

She was Creative Producer of the Asia Pacific Triennial of Performing Arts (Asia TOPA). Prior to living in Melbourne, Tam was Festival Producer of the UK's largest documentary festival and industry conference, Doc/Fest; produced feature documentaries for international theatrical and television release for Academy Award nominated documentary film company Chain Camera Pictures (Los Angeles); and was Producer for Pace Pictures on the Australia Week Festival (Los Angeles, New York), a joint initiative of the Department of Foreign Affairs and Trade, Austrade, Qantas and Tourism Australia.

In Melbourne, Tam has been Executive Producer of the Australian Art Orchestra, Executive Producer of late night programming for MONA FOMA, and Producer of the 98th International Society for the Performing Arts (ISPA) World Congress. Tam has also held programming roles with the Australian International Documentary Conference, Adelaide Festival of Arts, and the Department of Premier and Cabinet's

ABOUT TURNING WORLD AND IMAGIKAI

Founded in 2013 by Kate Ben-Tovim, Turning World is a boutique cultural agency connecting contemporary cultures in Australia and the Asia Pacific.

Turning World offers policy, curatorial and producing services with a focus on engaging with large-scale cultural institutions, governments and major events.

Imagikai is a boutique creative company based in Melbourne, focused on delivering change and building meaningful experiences in the entertainment and lifestyle markets.

Imagikai are specialists in engaging with international student and millennial Chinese audiences in Australia.

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