



**CHINESE SPEAKING
CONSUMERS
IN AUSTRALIA –
THEIR MEDIA AND
COMMUNICATION
PREFERENCES**

23 MARCH 2021

REACHING CHINESE SPEAKING COMMUNITIES IN AUSTRALIA

Census data shows that there were almost 600,000 Chinese (Mandarin or Cantonese) speakers in Australia in 2016, almost twice the number in 2011, with the 2021 Census expected to show further strong growth.

The Chinese community is a dynamic audience for marketers and identifying how best to connect and communicate with them is critical.

To understand the composition of the Chinese-speaking community, their usage of both Chinese and Western media, and their shopping habits, EternityX Marketing Technology commissioned Researchify Pty Ltd to conduct an online survey among 501 Chinese speaking adults across Australia in December 2020. Respondents were screened for age, gender and location to ensure a representative sample of Chinese speaking residents in Australia.

Key learnings from the study include:

- For many in our sample group English remains a barrier at some level and speaking Chinese, particularly at home, is the norm and persists even after many years in Australia.
- Chinese speakers use both Chinese and Western media in Australia however there is a significant bias toward Chinese media.
- Due at least in part to the preference towards Chinese media, there is limited overlap between the use of Chinese and Western media with generally 60% of users of any Chinese media group not using a Western media option.
- Communication in Chinese is important to Chinese speaking audiences. Across this whole sample of Chinese speakers, brand preference, brand trust and their likelihood to purchase brands were higher when communication from that advertiser was in Chinese.
- The length of time the person had been in Australia was the key factor in many media and consumer behaviours and are at their highest for those who have been in the country for no more than 20 years.
- This combination of a bias to using Chinese media and the direct influence using Chinese media by advertisers has on brand trust and purchase makes a compelling case that Western media alone is an inefficient way to connect with and influence the Chinese speaking audiences.

SAMPLE COMPOSITION

Young	50% under 35 (census data confirms the average age of 34)
Educated	45% have a BA, another 32% have a post graduate degree
Employed	75% are employed
Wealthy	60% earn over \$60,000 and 24% earn over \$100,000 (impressive given the young age profile)
Secure status	78% have permanent residency or citizenship
Urban dwellers	78% live in metropolitan areas

LANGUAGE

The survey found that 84% speak Chinese at home and 67% with friends.

SBS notes that 35% of Mandarin speakers and 25% of Cantonese speakers have poor or non-existent English. Only 46% of Cantonese speakers are reported as speaking English 'very well'. This makes it difficult to communicate effectively with this community using Western media. <https://www.sbs.com.au/inlanguage/languages/simplified-chinese> and <https://www.sbs.com.au/inlanguage/languages/cantonese>)

It is also clear that the use of Chinese persists, especially at home where at least 80% speak Chinese regardless of how long they have been in Australia.

Less than a quarter of respondents speak English at home most of the time for the first 20 years in Australia and 12-19% never do. Even after more than 20 years, only 40% use English at home most of the time although only 3% never do.

MEDIA USAGE

The following groupings were used to analyse the Chinese and Western media offerings. These groups were compared with individual social platforms, including WeChat, Douyin, Facebook and Instagram.

Chinese Radio

- 2AC Australian Chinese Radio
- 2OR Oriental Radio
- 3CW
- 2CR China Radio Network
- SBS Mandarin Radio

Chinese Newspapers

- Australian Chinese Daily/ Weekly
- Chinese Herald
- Epoch Times

Chinese Digital Apps Sites and News

- QQ/Qzone
- Youdao
- Tencent News
- Sohu News
- Toutiao
- Sina News
- 1688.com.au
- ozchinese.com
- acnw.com.au
- Weibo
- Syd/Melb Today

Chinese Streaming and TV Services

- iQiyi
- Youku
- Tencent Video
- Mango TV
- Sohu
- SBS Mandarin
- TVB

Chinese News (Print and Digital)

- Australian Chinese Daily/ Weekly
- Chinese Herald
- Epoch Times
- Tencent News
- Sohu News
- Toutiao
- Sina News
- 1688.com.au
- ozchinese.com
- acnw.com.au
- Syd/Melb Today

WeChat

Douyin

Xiao Hong Shu

Western Radio

- Nova
- Hit
- MMM
- KissFM
- SmoothFM
- ABC radio

Western FTA TV

- Channel 9
- 7 Network
- Network 10
- Foxtel

Western Newspapers

- The Australian
- The Financial Review
- The Daily Telegraph
- The Age
- Sydney Morning Herald

LinkedIn

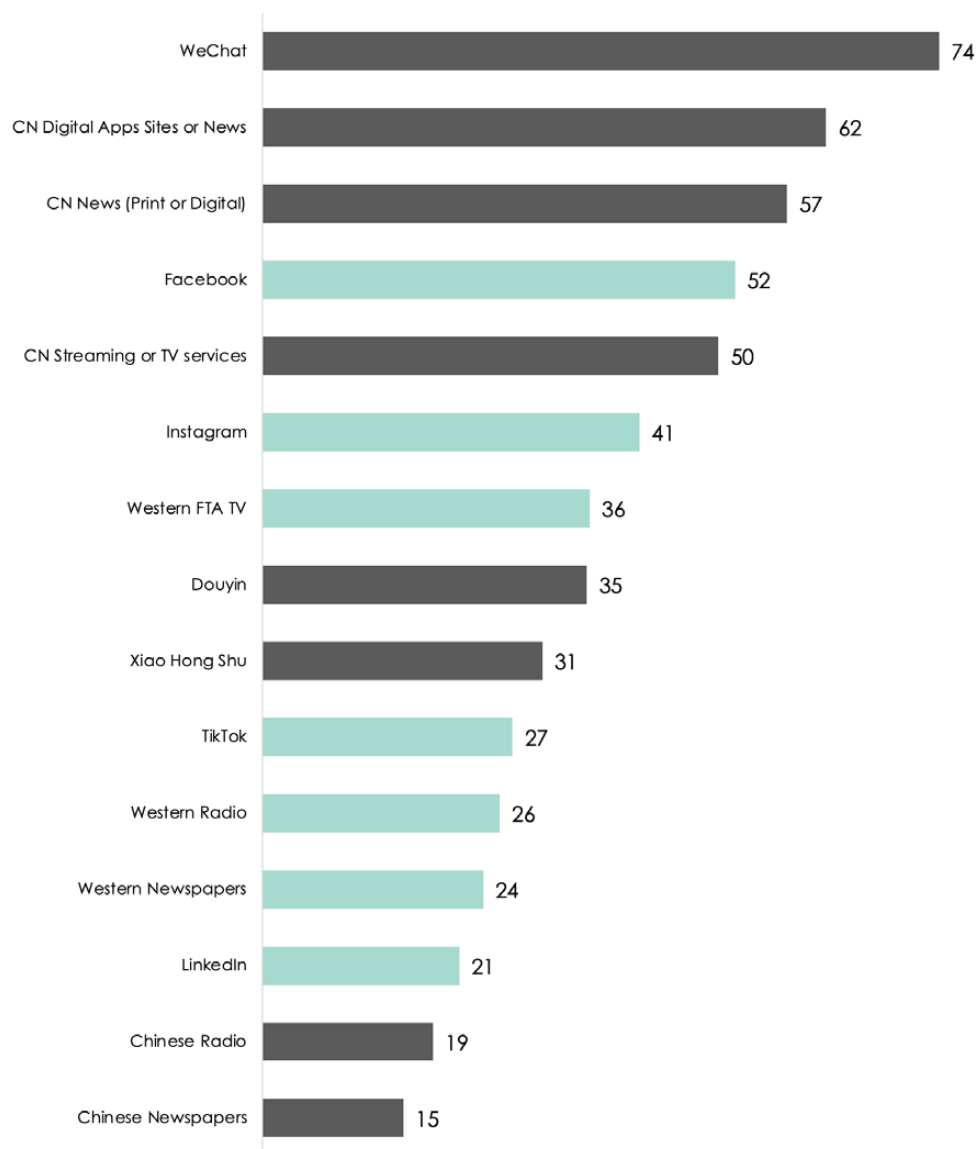
Instagram

TikTok

Facebook

While members of the Chinese-speaking community are found among the audience of any Western medium, their media usage is dominated by Chinese media, accounting for 8 of the 15 main media groups or individual media. The dominant Western media usage was social media platforms such as Facebook, and Instagram at 52% and 41% respectively, but their usage falls well behind the 74% who regularly use WeChat and the 57% to 62% who regularly use Chinese digital apps, sites, news or Chinese news offerings (print or digital).

REGULAR USERS OF CHINESE AND WESTERN MEDIA BY GROUP/KEY MEDIA (%)



■ CHINESE MEDIA ■ WESTERN MEDIA n=501

The tables below show the top 15 media groups/brands for awareness, regular use, frequency of using regular media and the proportion of the overall sample of Chinese speakers accounted for by those who use their preferred media at least a couple of times a week.

Awareness was high for both Chinese and Western media (averaged awareness for grouped media) with Chinese services appearing in 4 of the top 5 places. Chinese media also accounted for 6 of the top 10 media by regular use, with 4 of these being regularly used by at least 50% of the sample.

Regular use was then overlaid with frequency of use to reveal the size of audiences who use their preferred media at least a couple of times a week. Again, 6 of the top 10 most used media were Chinese with 66% of the Chinese speakers in the sample using WeChat at least a couple of times a week, followed by 42% using Chinese digital apps, sites and news and 38% using Chinese news offerings.

The primary use of WeChat is for communication (97% of users). 52% of WeChat users use the platform for News, and 48% of users use the platform for entertainment.

Due to survey limitations, no attempt was made to assign a value to time with or length of use of a particular platform. We expect that time spent with a particular platform would increase based on the nature of the content and frequency of content renewal. For example, it is likely that streaming services and News sites may attract longer session times less often than shorter form offerings and some social channels.

% Prompted awareness	
Chinese News (Print and Digital)	93
Chinese Streaming and TV services	89
CN Digital Apps Sites and News	88
WeChat	85
Western Newspapers	80
Facebook	78
Western FTA TV	78
Douyin	71
Western Radio	70
TikTok	67
Instagram	68
Chinese Radio	61
Chinese Newspapers	57
LinkedIn	54
Xiao Hong Shu	53

% Regularly use	
WeChat	74
CN Digital Apps Sites and News	62
Chinese News (Print and Digital)	57
Facebook	52
Chinese Streaming and TV services	50
Instagram	41
Western FTA TV	36
Douyin	35
Xiao Hong Shu	31
TikTok	27
Western Radio	26
Western Newspapers	24
LinkedIn	21
Chinese Radio	19
Chinese Newspapers	15

% of regular users who use at least a couple of times a week	
WeChat	91
Douyin	85
Instagram	81
Facebook	81
Western Radio	81
TikTok	81
Xiao Hong Shu	81
Western FTA TV	76
LinkedIn	70
CN Digital Aps Sites and News	69
Western Newspapers	67
Chinese News (Print and Digital)	67
Chinese Radio	66
Chinese Streaming and TV services	64
Chinese Newspapers	49

% of regular users who use at least a couple of times a week as % total sample	
WeChat	66
CN Digital Aps Sites and News	42
Facebook	42
Chinese News (Print and Digital)	38
Instagram	33
Chinese Streaming and TV services	32
Douyin	30
Western FTA TV	27
Xiao Hong Shu	24
TikTok	22
Western Radio	21
Western Newspapers	16
LinkedIn	15
Chinese Radio	12
Chinese Newspapers	8

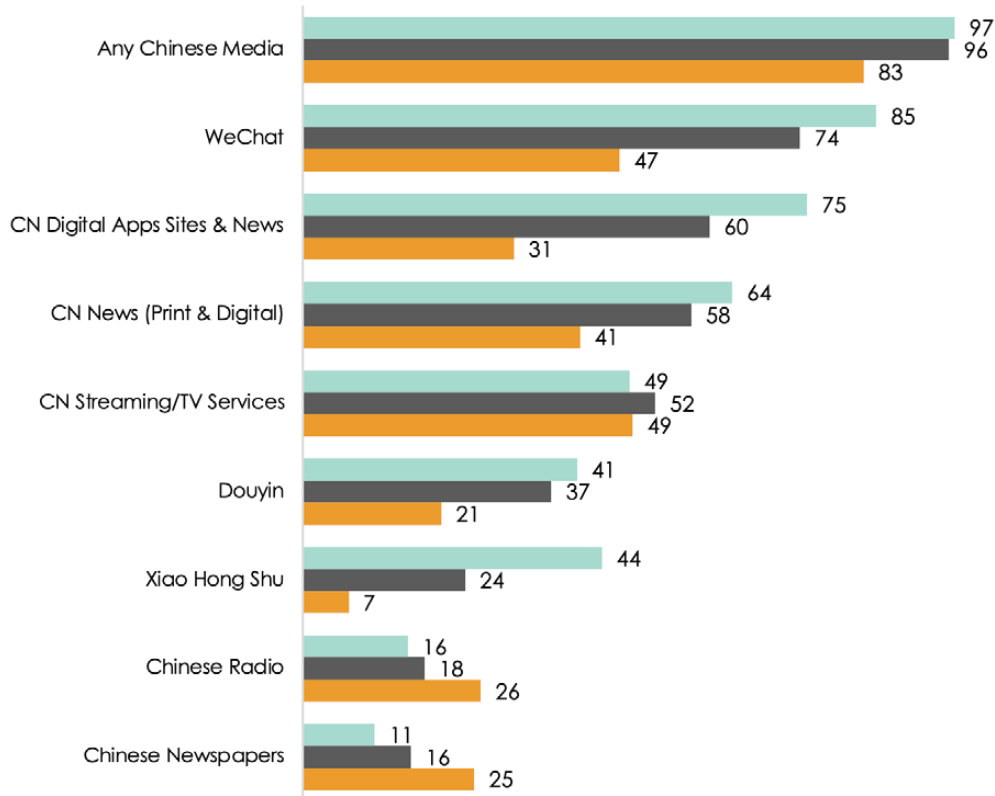
IMPACT OF DEMOGRAPHY ON MEDIA USAGE

TIME IN AUSTRALIA

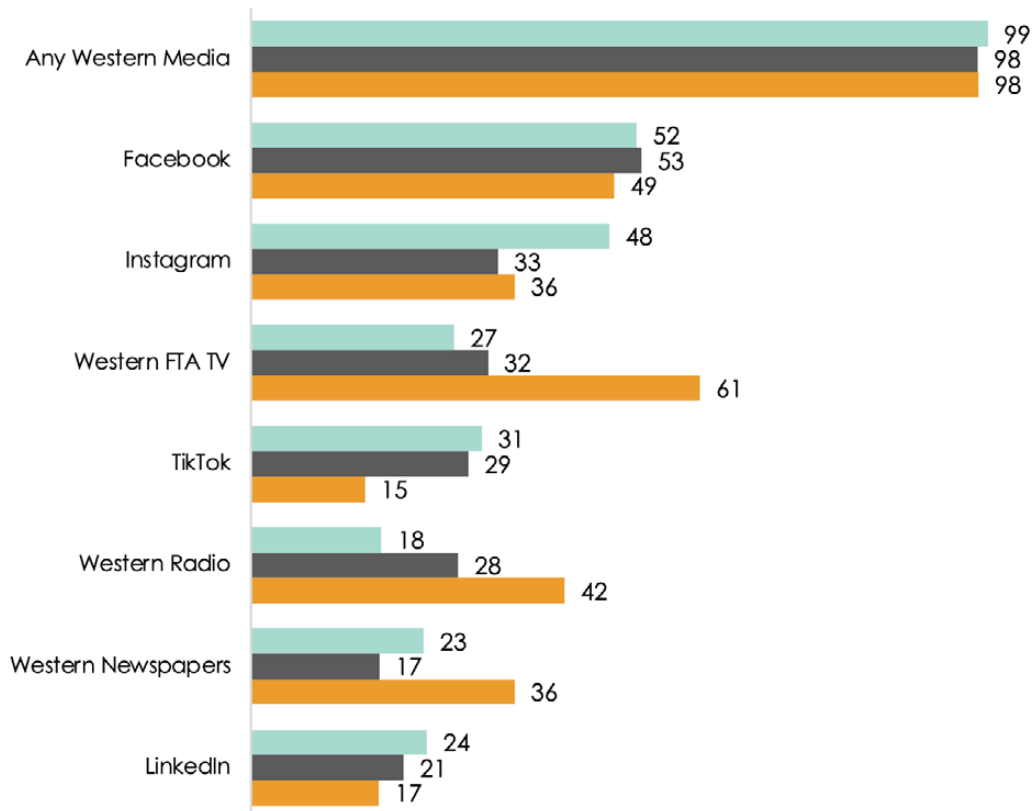
This is a key differentiator among Chinese speakers and is not strictly aligned with age. The myth that they arrive as young students, secure a visa and stay is not quite right.

- While there is a relationship between age and time in Australia, 27% of those aged 55 or older have been here for less than 10 years, and 45% of 18-24 year olds have been here for more than 10 years.
- The group most likely to be 'new' are aged 25-34, with 68% of this age group having been in Australia for less than 10 years.
- As well as preferring Chinese media, those in Australia for less than 10 years reported the highest brand trust and purchase influence for Chinese advertising on Chinese sites. This provides advertisers with the opportunity to tap into their language-based preference early in their time in Australia.
- Those who had been in Australia for less than 20 years, and in particular less than 10 years, showed much heavier use of Chinese media overall. They were much more likely than longer term residents to regularly use Chinese digital apps, sites or news.
- The picture is different for Western media with generally much less regular use of Western media than Chinese and less particularly less use by those in the country for less than 10 or 20 years. Traditional Western media (free to air TV, radio and newspapers) most used by those who had been in the country for more than 20 years, a group that only represents around 20% of the Chinese speaking community.

% REGULARLY USE CHINESE MEDIA BY TIME IN AUSTRALIA



% REGULARLY USE WESTERN MEDIA BY TIME IN AUSTRALIA

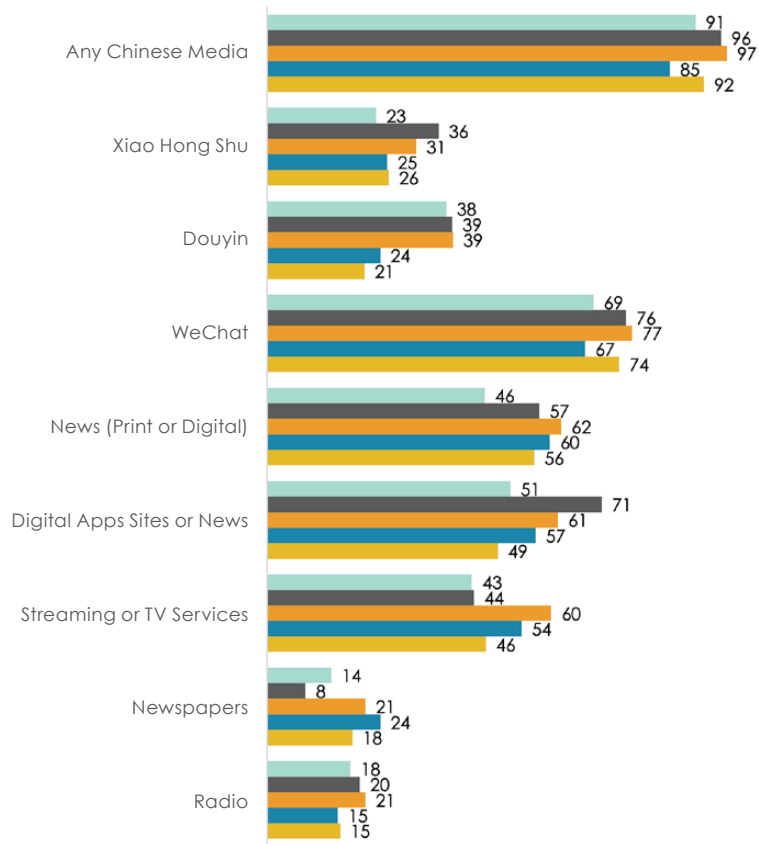


■ <10
 ■ 11-20
 ■ 21+
 n=501

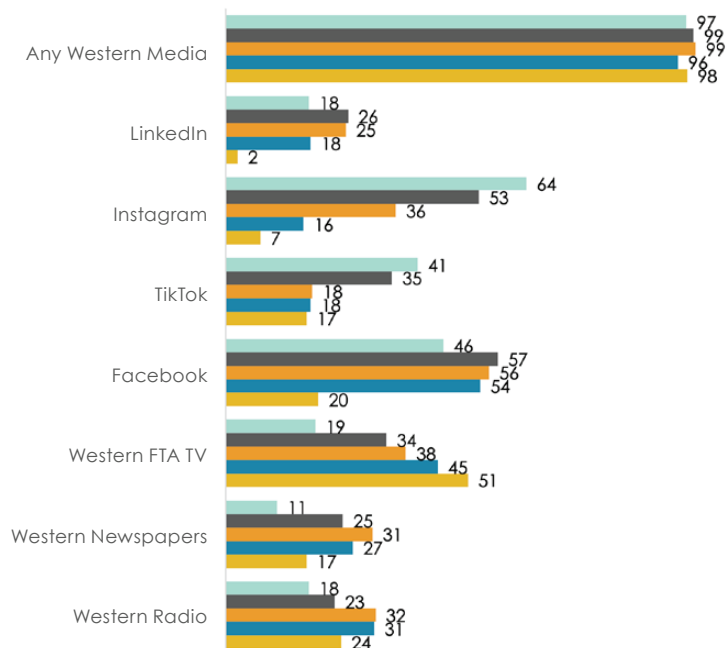
AGE

- Age was not a strong discriminator of Chinese media use with audiences more likely to be maintained across age groups than was the case for Western media.

% BY AGE GROUP WHO ARE REGULAR USERS OF CHINESE MEDIA

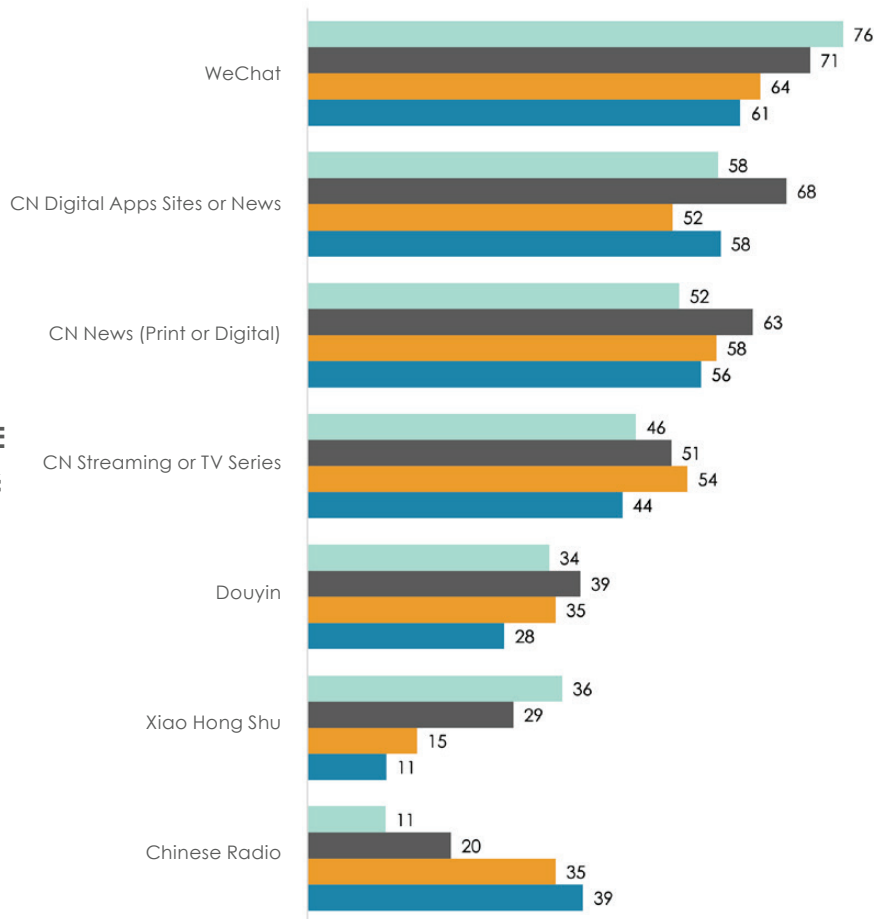


% BY AGE GROUP WHO ARE REGULAR USERS OF WESTERN MEDIA

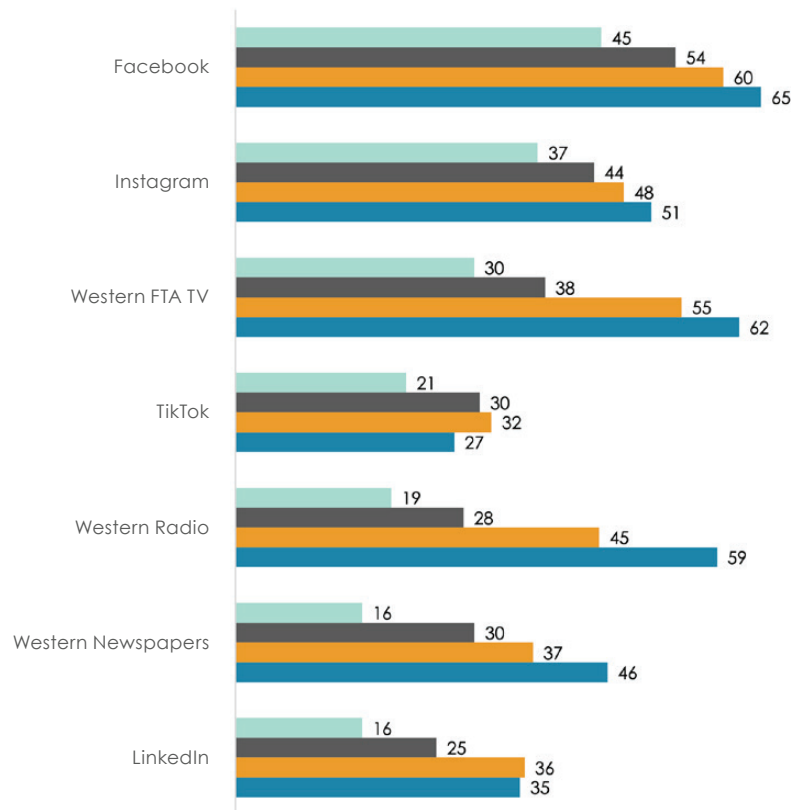


18-24 25-34 35-44 45-54 55+ n=501

% BY INCOME WHO ARE REGULAR USERS OF CHINESE MEDIA



% BY INCOME WHO ARE REGULAR USERS OF WESTERN MEDIA

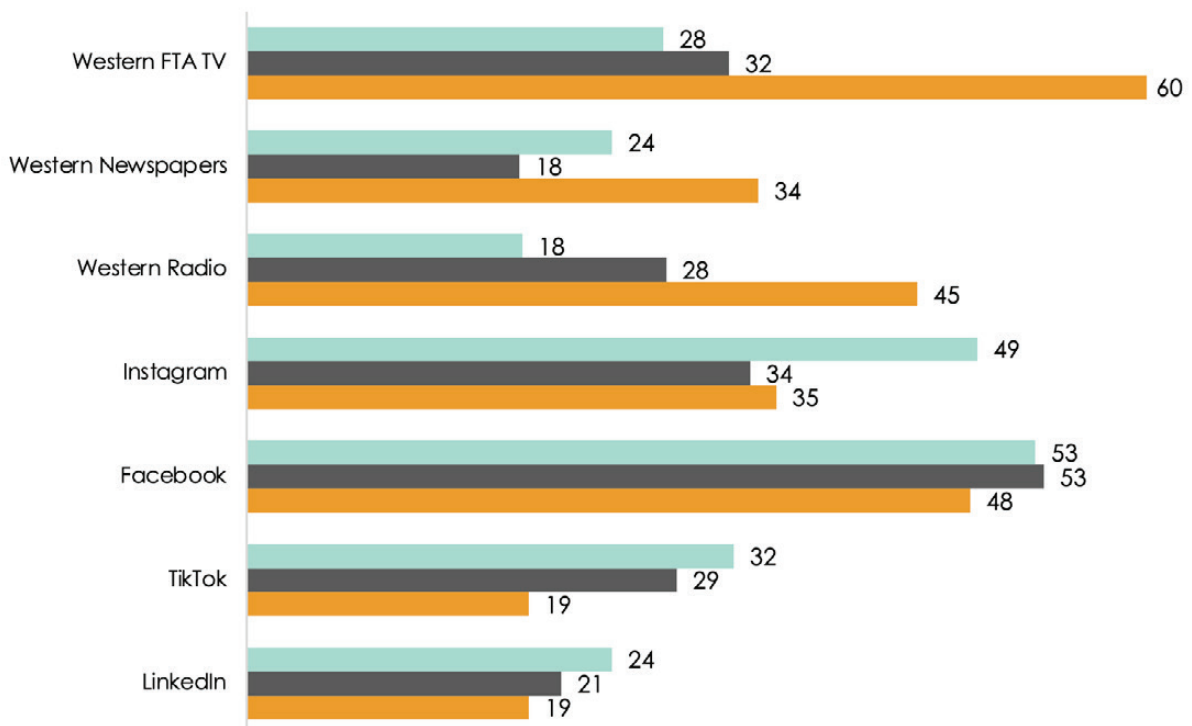


■ <60k
 ■ 60-99k
 ■ 100K+
 ■ 150K
 n=415

AUDIENCE DUPLICATION

- There is not a great deal of overlap between regular users of Chinese and Western media
- As shown in the table below, for the majority of cases (highlighted in green), less than 40% of regular users of any Chinese media group or major individual product also regularly use a Western media group or product.
- The chart below shows the audience duplication of regular users of any Chinese media users and Western media by time in Australia.
- The overlap with social media platforms Facebook and Instagram is predictably the largest and skewed to newer arrivals. However, only around 50% of regular users of any Chinese media used them.
- For those in Australia for less than 10 years, no more than 53% who used Chinese media regularly also regularly used media in any of the Western media groups or Western social media.
- Only 28% of these new arrivals also used Western FTA TV regularly, only 18% used Western radio, 24% used Western newspapers, 32% TikTok and 24% LinkedIn.
- The proportion of Chinese media users who use Western media rises sharply for Western FTA TV, newspapers and radio among those in Australia for more than 20 years.

% REGULAR USERS OF CHINESE MEDIA WHO ALSO USE WESTERN MEDIA BY TIME IN AUSTRALIA

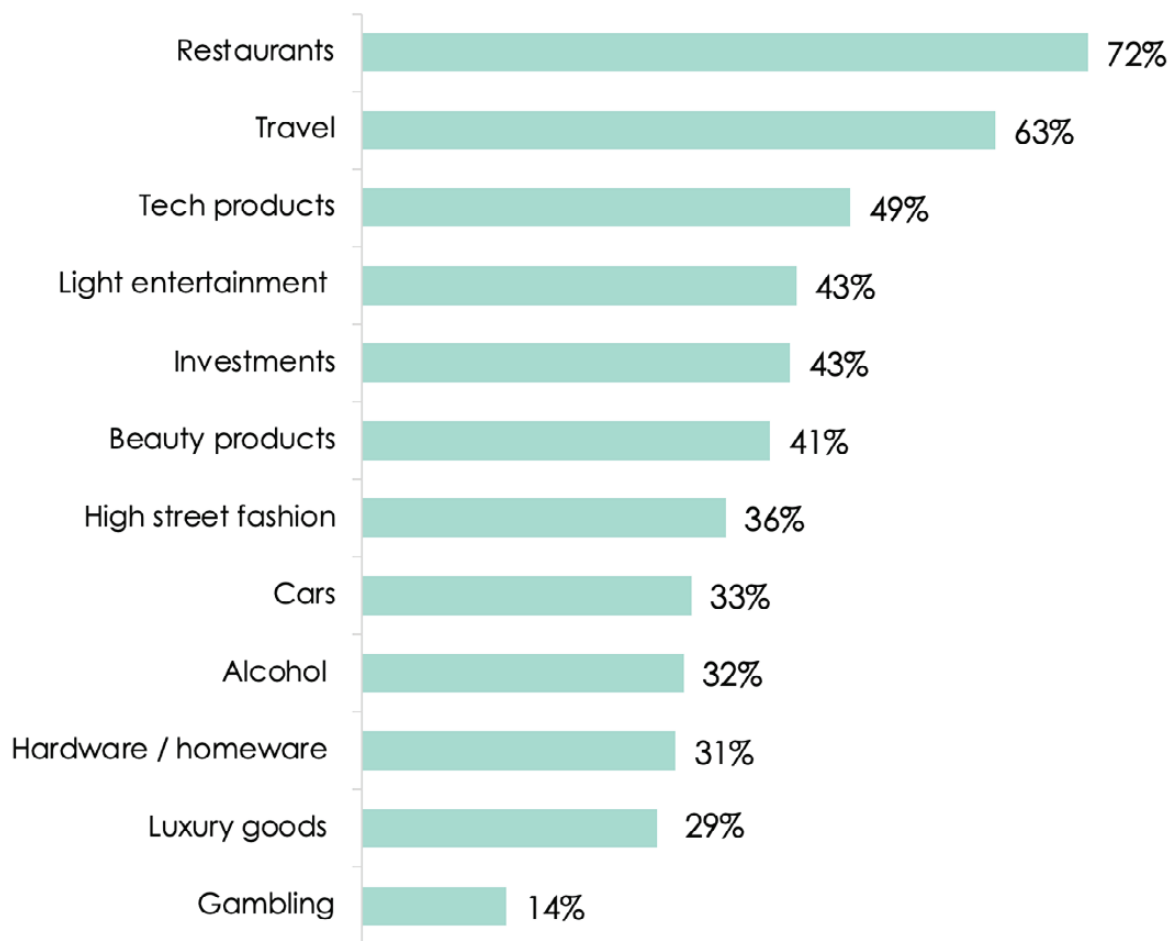


■ <10 YRS
 ■ 11-20 YRS
 ■ 21+ YRS
 n=501

DISCRETIONARY SPENDING

- A restaurant was the most cited way respondents prefer to spend discretionary funds, mentioned by 72%.
- Top income earners were more likely than others to have reported virtually all options for spending as a preference.
- Travel was a priority for 63% but may have been dampened by COVID. It was particularly important for those aged 45-54 (82%).
- Chinese media usage showed regular users of radio, newspapers, Douyin and Xiao Hong Shu with above average preference to spend for many products.

HOW RESPONDENTS PREFER TO SPEND DISCRETIONARY MONEY

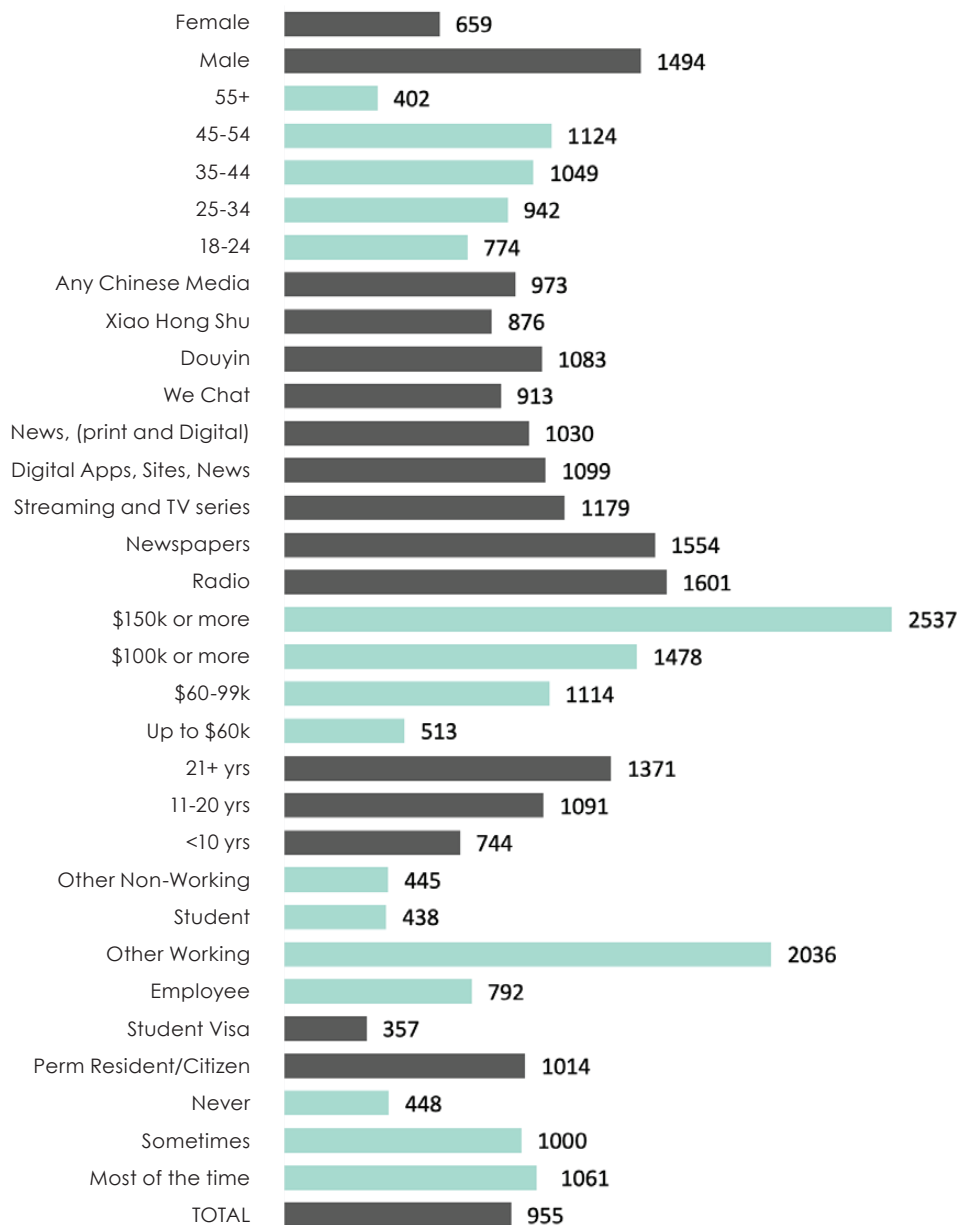


n=501

EXPENDITURE ON LUXURY GOODS OR BEAUTY PRODUCTS

- Among the 59% of the sample who mentioned a preference to spend on luxury goods or beauty products, their average expenditure was \$955 a month.
- Men spent \$1494 a month compared with \$659 by women.
- Expenditure increased with income from a low of \$357 a month for those on a student visa to \$2537 for those earning over \$150,000.
- Spending also increased with age until 54, then fell to just \$402. This may be due to the large proportion of non-working women over 55.
- Above average expenditure between \$1000 and \$1600 a month of was seen among regular users of CN radio, CN newspapers, streaming/TV services, digital apps, sites and news, Douyin, and print or digital news.

AMOUNT (\$) SPENT PER MONTH ON LUXURY GOODS OR BEAUTY PRODUCTS

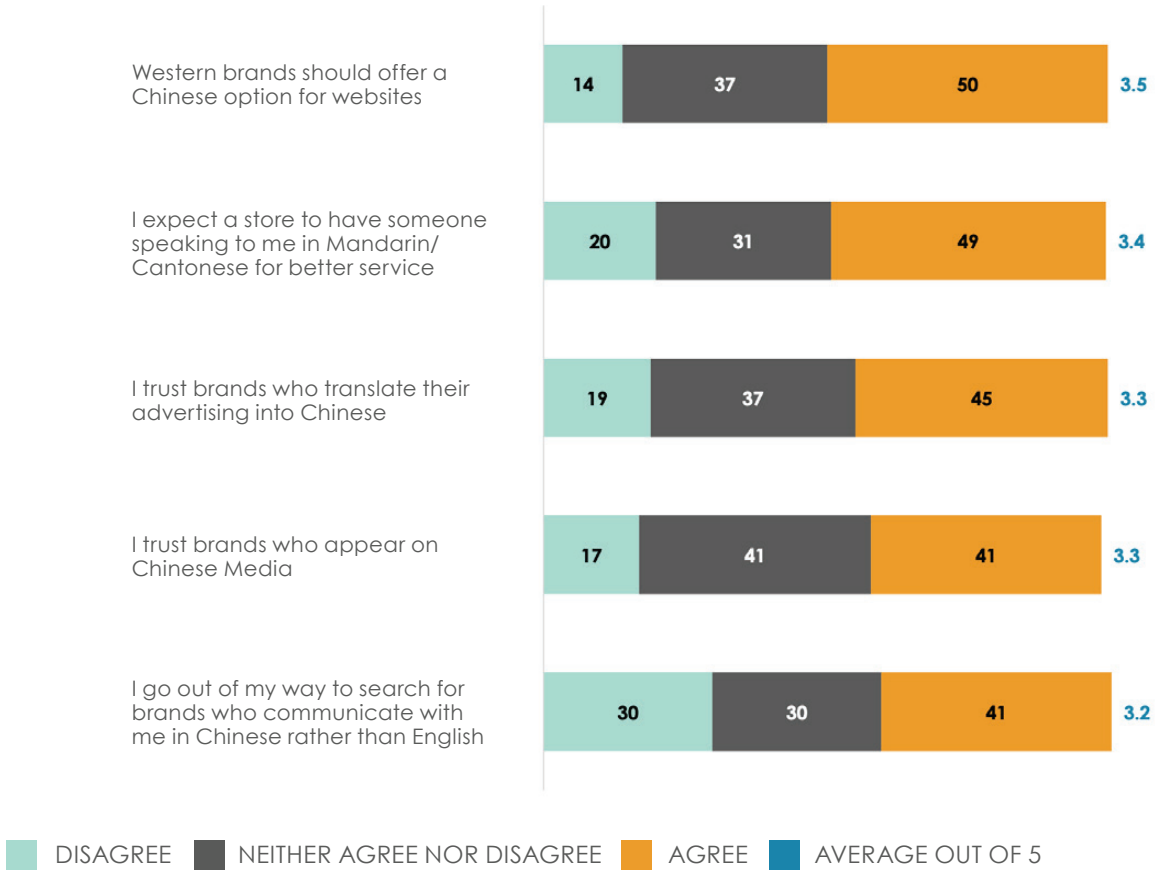


n=296

COMMUNICATION IN CHINESE AND BRAND TRUST

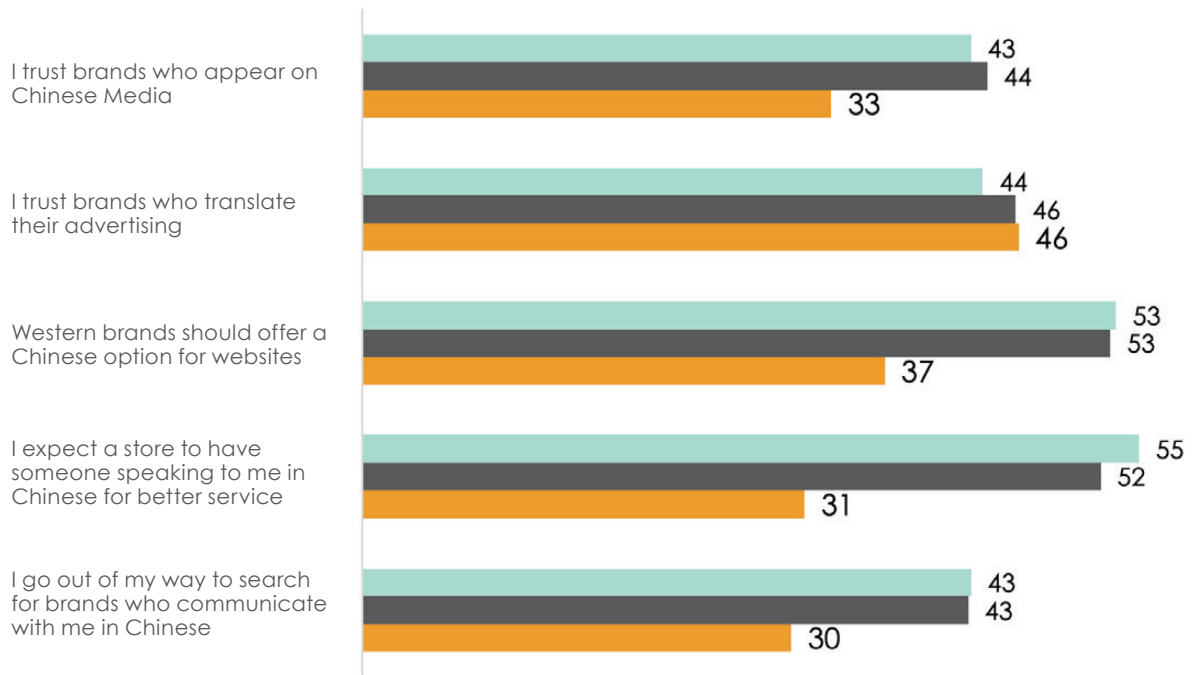
Respondents reported the strong influence of Chinese communication on their brand trust and purchase intentions.

AGREEMENT WITH EACH STATEMENT (% AND AVERAGE)



- 50% agreed that Chinese brands should offer a Chinese option on their website
- 41% trust brands they had seen on Chinese media
- 45% trust brands whose advertising has been translated into Chinese
- 49% expected a store to have someone who speaks Chinese
- 41% agreed they go out of their way to search for bands that communicate in Chinese

% WITH 4+/5 AGREEMENT WITH STATEMENT BY TIME IN AUSTRALIA



■ <10 YRS
 ■ 11-20 YRS
 ■ 21+ YRS

While there was somewhat lower agreement (41%) that they would search for brands that communicate in Chinese, this is a powerful result as it puts the effort on the consumer to actively search and makes the chance of an advertisers successfully communicating much more difficult. No statement was disagreed with by more than 20%, with only 3-10% strongly disagreeing.

- Brand trust was strongly associated with time in Australia for 4 of the 5 statements.
- Agreement with “I trust brands who translate their advertising into Chinese” was similar regardless of time in Australia, increasing very slightly among those in the country for more than 10 years.
- However, agreement dropped markedly after 20 years in Australia for other statements.

CONSUMER BEHAVIOUR

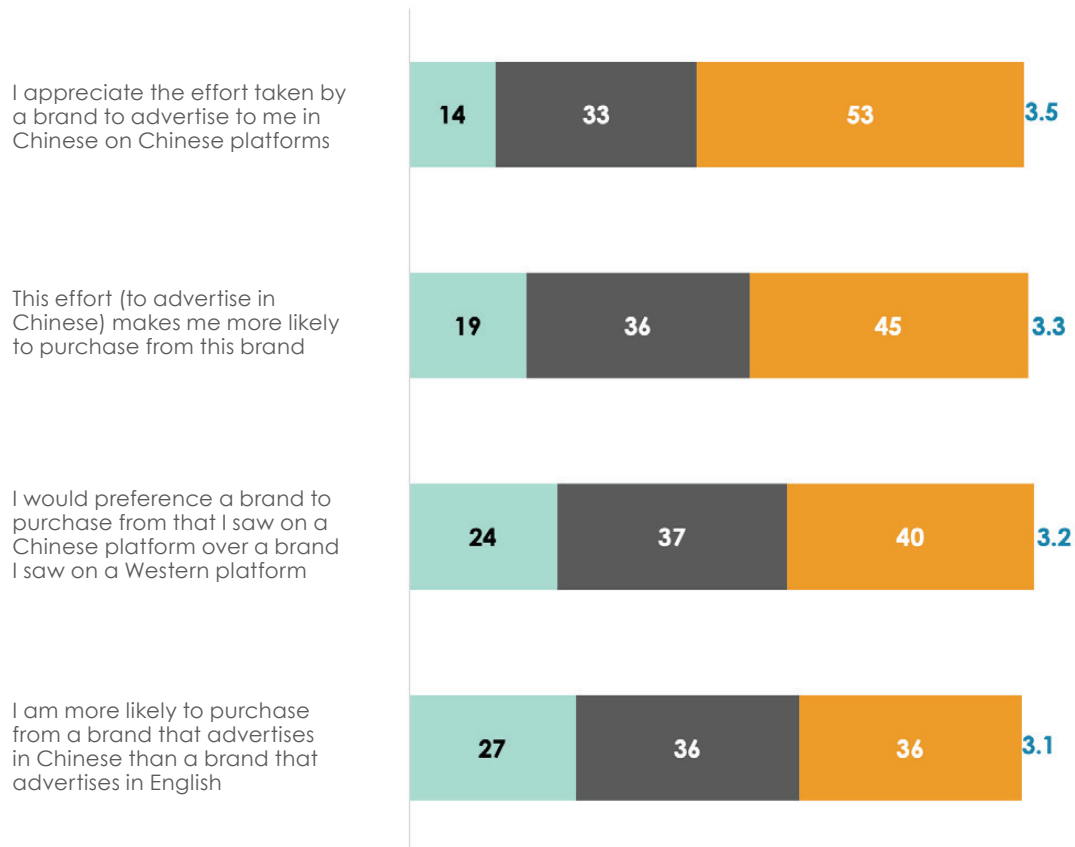
Respondents rated their likelihood to take the action outlined in four consumer habit statements regarding the influence that advertising in Chinese, on Chinese platforms had on purchase behaviour.

The results indicate that advertising and communication in Chinese has a high level of influence on brand preference and purchase, with less than 10% saying it was “very unlikely” for any of the statements.

- 40% were likely to prefer a brand seen on a Chinese platform over one on a Western platform.
- 36% were more likely to buy a brand that was advertised in Chinese rather than English.
- 53% appreciated the effort taken by a brand to advertise in Chinese, on Chinese media platforms.
- 45% felt the effort to advertise in Chinese makes them more likely to purchase from this brand.

While only 36% were more likely to buy a brand that was advertised in Chinese rather than English, it was still a strong result. The other three statements were more directed to a preference for communication in Chinese on a Chinese platform, reinforcing the positive impact using a Chinese platform has on purchases.

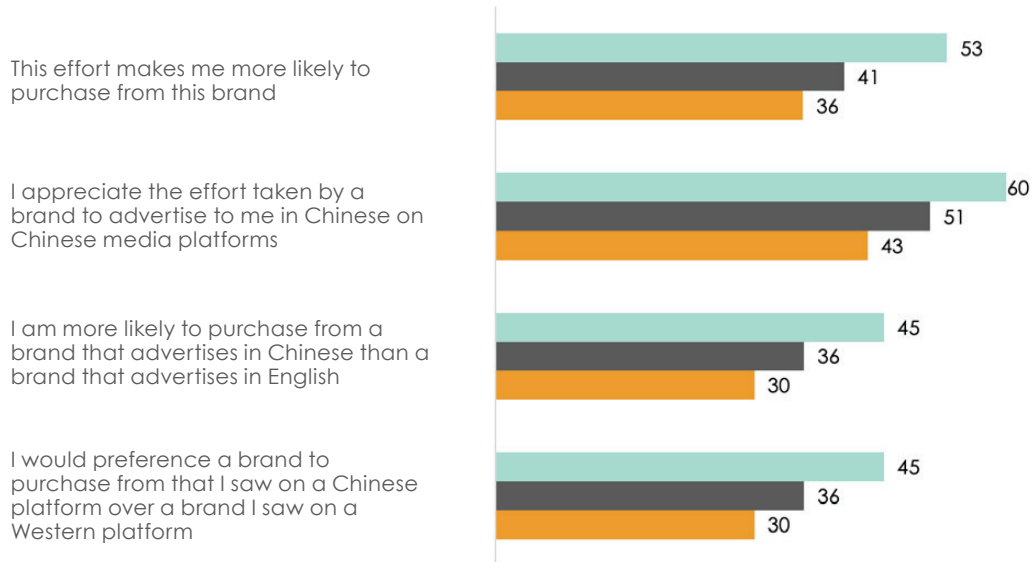
LIKELIHOOD OF EACH STATEMENT (% AND AVERAGE)



UNLIKELY (1 OR 2) NEITHER LIKELY NOR UNLIKELY (3) LIKELY (4 OR 5) AVERAGE OUT OF 5

As seen with the brand trust statements, Chinese speakers who had been in Australia for more than 20 years were considerably less likely than newer arrivals to be influenced by Chinese platforms.

% GIVING 4-5 FOR LIKELIHOOD TO EXHIBIT CONSUMER HABIT BY TIME IN AUSTRALIA



■ <10 YRS ■ 11-20 YRS ■ 21+ YRS n=501

CONCLUSION

The combination of preferring Chinese media, the strong impact of communication in Chinese on brand trust and purchase decisions, and limited overlap between Chinese and Western media is powerful.

The affluent, big spending Chinese community, especially those in the country for less than 20 years, can only be effectively reached through advertising on Chinese platforms in Chinese.



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