BRITISH
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Culture24 /

FIT FOR CHINA:

Understanding what is needed to develop new online audiences for UK arts and heritage in China

Sejul Malde, March 2016

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1 INTRODUCTION

Background

The British Council commissioned Culture24 to prepare this report as part of the 'Fit for China' Digital Showcasing Pilot Project[1], which runs from autumn 2015 to spring 2016. The project pilots an approach to enable UK arts and heritage organisations to showcase the best of British arts and heritage content directly to online audiences in China. This is part of a broader British Council Digital Showcasing Project seeking to connect this content with international audiences online.

Objectives

A key question at the heart of the 'Fit for China' Digital Showcasing Pilot is how to create and repurpose UK digital arts and heritage content that meets the needs of Chinese audiences online. To begin to do this we need to define and understand these needs. This report represents a starting point in doing this, to help inform and shape the thinking behind the pilot project.

Whilst the immediate objective of this report is to provide wider context and understanding for the Fit for China Project, it is also intended that this report, alongside any additional knowledge and documentation produced at the conclusion of the pilot project, will be useful in building contextual understanding for any UK arts and heritage organisation interested in creating digital arts and heritage content for Chinese audiences.

Rationale

Publishing your online cultural content, whatever it is, to target audiences online, whoever they are, can no longer rely on a straightforward 'publish and they will come' mindset. Increasing competition for online attention, a widening variety of niche interest communities, the presence of multiple and distributed online channels and expectations of a greater two-way relationship between publishers and their audiences are all reasons why this approach will no longer work. Instead your content must be shaped in order to be editorially, technically and visually relevant to audiences[2].

This is even more necessary when wishing to connect international online cultural content with Chinese audiences. China represents an exceptional challenge for any international business or organisation to better understand and connect with. This is more than just a language barrier. As a society and potential market it presents a fundamental contradiction that needs grappling with: a capitalist driven economy on an, until very recently, upward trajectory, led by a one-party Communist government. This is bound to throw up a unique set of audience needs that require better understanding. And whilst from a digital access perspective, censorship of common international platforms also represents an obvious obstacle that needs overcoming, China's online platforms and online behaviours vary in important ways from those that may be considered their international equivalents. This variation is not all due to censorship.

In China, local variations of usage are driven by a variety of factors, such as language, culture, levels of economic development, and the underlying digital ecosystem. It is impossible to understand the nuances of all these areas,

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What needs?

For a piece of online cultural content to become fit for purpose for its audiences, it has to first reach them, before seeking to engage them both digitally and culturally. In order to reach Chinese audiences with online arts and heritage content, we need to first understand and connect with the market for that content. Therefore a review of the relevant Chinese **market needs** and the related opportunities and challenges for online cultural content is needed. To engage Chinese audiences with this content, it must be editorially selected, shaped and presented to respond to their online behaviours and own cultural interests. Therefore a better understanding of relevant Chinese **online behaviours** and **cultural interests** is also needed.

A lack of experience of potential Chinese audiences, alongside perceived cultural and online differences from UK audiences, makes the challenge of understanding market needs, online behaviours and cultural interests of Chinese audiences particularly acute for UK organisations. By examining each of these areas in turn, this report seeks to reveal the potential opportunities and the challenges for UK arts and heritage organisations seeking to connect their digital arts and heritage content with Chinese audiences online.

Approach

This research draws upon the insights of relevant existing literature exploring these areas. Due to the increased importance of China in the global economy, there has been a recent thirst to better understand the Chinese culture, its people and its potential market. As such there is a large amount of recent research and literature exploring this. Much of this literature relates to the following kwnowledge areas:
• Digital usage
• Online marketing
• Consumer needs
• Business studies
• Tourism
• Media studies
• Cultural studies
• Arts development

Very few texts were identified relating to more direct themes for this study, namely those focussing on the relationship between arts provision and digital engagement for Chinese audiences or on specific Chinese audience attention patterns and responses to particular editorial formats. These are research gaps that should be explored further in other studies. Nonetheless the body of literature drawn from the areas outlined, supplemented by a few specifically relevant texts, provides a suitable and wide ranging information resource for this study to draw upon.

Scope and limitations

The review of relevant literature was limited to those presented in English language only and it was impossible to identify and analyse every item of relevant documented research, even if in English. As such this study does not claim to present a comprehensive literature review per se but rather an indicative review of literature that better informs our understanding of relevant Chinese audience needs. We must also accept that the landscape relating to these audience needs will rapidly develop over time, so this study represents a snapshot as at March 2016.

Reviewing this literature to draw insights into other related creative and cultural objectives, aside from the showcasing of UK art and culture online, is outside the scope of this study. This includes, for example, the development of creative industries in China, commercial development of other online business in China (such as online shopping), Chinese tourism or the specific challenges faced by local and foreign media within China.

2 UNDERSTANDING CHINESE MARKET NEEDS

CHONGQING Ciqikou (Porcelain Village) by Michael Gwyther-Jones, CC-BY 2.0

2.1 The digital market

The potential digital market in China is huge. The most recent reported statistics[3] show that at the end of 2014 China had 649 million Internet users, double the total population of the US. The rate of growth is significant, with the number of Internet users having approximately doubled over the last 7 years[4].Despite this rapid rise, only 47.9% of the total Chinese population are online users. By contrast more than 40 nations have at least a 70 percent online penetration rate, with China ranked approximately 86th[5]. This means the potential for further growth is huge. Indications are that this capacity for growth will be met very soon with a recent announcement by China's state council of an investment of 140 billion Yuan ($22 billion USD approx.) towards extending the broadband network to 98% of the country by 2020

and involving widening online access to around 50,000 villages in rural and remote China[6].

Mobile Internet usage in China is massive, with the most recent statistics showing 557 million mobile Internet users, representing 85.8% of the total Chinese Internet user population[7]. Estimations are that mobile devices will account for one third of the time Chinese adults spend consuming media in 2015[8]. China is the world's biggest mobile phone market but the scope for further growth is again significant especially as Internet speeds in China are so poor, with China currently ranked worse than 80th in

the world. China Mobile, the world's largest mobile phone operator, has been testing so-called 'pre-5G' connections, which could be more than 10 times faster than current 4G mobile Internet; and premier Li Keqiang has said state-owned mobile network service providers should aim to increase speeds for urban users by 40 per cent[9]. This technology advancement could see China's mobile phone market, already the largest in the world, grow at an even faster rate as sub-standard Internet speeds improve.

Internet users in China are generally young city-dwellers and are split more evenly between

the Chinese cultural market is more responsive than other countries to the potential of online engagement as an alternative to engaging with arts and culture in person

Crown Chinese New Year Decorations 2 by Daniel Lee, CC-BY-ND 2.0

males and females than in other countries. The most recent statistics show an overwhelming majority (78.1%) of Chinese users were aged 10–39. Most prominent of these are within the 20–29 age group, which accounted for 31.5% of the national total.

Female Internet usage is significant. The male/female ratio of Internet users is split 56.4%/43.6%, but in terms of 'digital junkies' – individuals who spend significantly more time online than other groups and are early adopters of new technology –there is a much more even gender split. This contrasts with other countries like the US where digital junkies are mostly male[10]. Most of China's Internet users reside in the large cities with rural users accounting for just 27.5% of the total.

The average online weekly use of the Internet is 26.1 hours, or almost 4 hours a day. The average weekly usage has increased by

almost 8 hours in the last 4 years. In terms of locations of Internet usage, home is the most popular, followed by the workplace, Internet bars, public places and schools.

2.2 The cultural market

For the purposes of understanding the Chinese cultural market, we are specifically looking at culture in a narrow sense – in terms of interest and activity around arts and heritage, rather than more anthropological interpretations. Chapter 4, in contrast, draws upon a wider perspective of Chinese culture in order to better understand emerging cultural needs.

Cultural activity
Research conducted by Morris Hargreaves McIntyre (MHM) for the British Council[11] explored the Chinese arts and cultural market as at August 2014. This research

surveyed panels of Internet-enabled adults living within the 8 largest Chinese cities. This identified that 60% of the adult Chinese urban population were 'culturally active', defined as having participated in cultural activity in the past 3 years. This translates as a total population of 323.4 million. The cultural activity of these audiences over the last 3 years is broken down as follows:
• 87% have been to a museum or art gallery
• 99% have watched a film
• 80% engaged with literature
• 68% attended a music event (51% classical, 67% modern)
• 69% attended a theatre (drama or comedy event)
• 56% attended a dance event

Desire for online engagement with arts and culture
The MHM research identified a huge opportunity to engage Chinese audiences with arts and culture online. It found that the Chinese cultural market is more responsive than other countries to

the potential of online engagement as an alternative to engaging with arts and culture in person

and also to help people experience a greater variety of international culture and art. The interest in and openness to digital access is exceptionally high. 81% of the culturally active market agreed that watching performances online is a great alternative to attending in person. 80% agreed that the Internet is a vital tool for experiencing international art and culture.

Potential cultural audience segments
The research also outlined three key target audiences groups for arts and cultural activity in China, defined as 'Cultural Segments'[12]. The largest segment in urban China (27.1%) and one of the most culturally active is **Expression**. The Expression segment is creative and confident, in-tune with their spiritual side. They enjoy being part of a community, sharing and connecting with others through culture and tend to have an engaged, international outlook, interested in other cultures. Discussion and participation are prized over exclusivity. They value arts and culture and want to see them thrive. The Expression segment is active online – viewing the Internet as a great alternative to physical attendance and a vital way of experiencing international arts and culture. There is high interest in using the Internet to access all art forms among this segment.

Another key target segment is **Stimulation,** representing 13% of the Chinese culturally active

population. People in this segment are enthusiastic attenders of the arts, have eclectic tastes and are open to a wide range of experiences veering towards the more contemporary elements of programmes. In China, the Stimulation segment is less digitally active when compared with other segments and in comparison with the way this segment behaves in other territories. However they are very likely to see online engagement as an additional way to consume culture and feed their habit and have among the highest appetites for performing arts and mixed artform content online.

A third potential target Culture Segment is **Affirmation,** making up 11% of the culturally active population. This segment tends to be aspirational, working hard to make sure they are doing the right thing and wearing their cultural consumption as a badge of pride. They see the arts as a way to get something more worthwhile out of life. They are open-minded when it comes to arts and culture, viewing it as a means of developing themselves as individuals at the same time as having fun. In China, the Affirmation segment has relatively high levels of attendance at arts and cultural events. They are very active online and also acknowledge the Internet as a way of accessing work that they can't attend.

Interestingly the **Entertainment** segment, who have mainstream and popular cultural tastes, are relatively inactive in China. They make up the smallest segment of the culturally active population at 5%.

Cultural capital
Whilst the statistics and segments outlined above are helpful in beginning to identify the cultural market opportunity available to UK arts and heritage organisations in China, they cannot solely be relied upon to get a deeper understanding of the differences within a particular market's participation in the arts. We must consider other more sociological differentiators, for example, 'cultural capital' which is the possession of cultural knowledge that can be used to social and economic advantage.

Cultural capital in China, as in the UK, is not distributed equally and this affects the extent to which different individuals can participate in cultural activities[13]. As the recent NESTA 'Found in Translation' report mentions in connection to reading – 'possession of authority, skill or property, significantly differentiate reading habits and tastes' and this is arguably true of other cultural activities. Interestingly the report identifies that this differential in cultural capital is not just about disparities in education and wealth but also about particular distinctions to do with time and abilities to form habits: 'those in managerial and professional occupations not only read highbrow books more frequently but also read more widely across genres. By contrast, self–employed individuals possess the least amount of cultural capital, reading less overall than production and service workers. Interestingly, private business owners, while possessing more economic resources than other groups, are found to resemble working classes

much more than elite classes in preferences. One possibility is that, like the self–employed, this group has less time to invest in cultural capital and that the cost of this capital is high, based on the not unreasonable assumption that the demand for culture is influenced by past consumption, whatever the precise mechanism: learning–by–consuming, rational addiction or habit formation'[14].

2.3 The online platform market

One of the major challenges to connecting Chinese audiences with UK arts and heritage content online is identifying and using relevant platforms to reach them. There are a number of reasons why this is so problematic.

Firstly, many of the established and familiar Western platforms have been blocked by the Chinese government. Social media channels such as Facebook and Twitter, alongside YouTube, were blocked in 2009 following riots in Xinjiang[15] and most Google services have been blocked in the last few years[16].

Secondly China's online platform market is very fragmented and local. Over 80% of Chinese social media users are active on more than one site, and local platforms dominate the market[17]. Each social media platform type has at least two major local players. This fragmentation increases the complexity of the social-media landscape in China and requires significant resource and expertise to manage this.

Thirdly the Chinese online platform market often displays the 'leapfrog effect', meaning that Chinese audiences often leapfrog established pathways of platform take-up and behaviour already seen in the West. Chinese audiences have already leapfrogged everything from voicemail to email, turning instead to platforms such as WeChat to get both in a more efficient way[18].

Lastly, even if Chinese audiences use platforms with familiar functionalities to Western platforms, their needs, motivations and behaviours in using them may well be different. This is explored in more detail in the next chapter.

This section highlights some of the key online platforms used in the Chinese market and basic considerations around them. A deeper exploration of the digital behaviours and cultural interests that relate to these platforms is explored in Chapters 3 and 4.

Websites
Basic service provision remains one of the biggest challenges for any international organisation's website in China. Externally hosted sites may run counter to the Chinese firewall and may be frequently unavailable, timed-out or may load at such slow speeds that users might become frustrated and go elsewhere. For optimum service accessibility and SEO results, a website should ideally be hosted within China.

The Chinese web landscape has traditionally been held back due to inferior hardware and technology, but this is quickly

becoming a thing of the past. Nonetheless it is important not to underestimate technical challenges such as browser compatibility. With more than 20% of China web audiences still using basic IE6 browsers, having basic browser fall-back capability built into web development is necessary to reach all audiences[19]. Of course as in the UK, device compatibility is crucial when designing websites in China, particularly as 85.8% of the total population of Internet users is using mobile devices.

The website build and design must be fully localised to avoid any cultural barrier. The website must not only be presented in Mandarin, it has to be built in Mandarin. The wire-framing, design, coding and content must be tailored to a Chinese user experience. Chinese audiences have distinct web browsing behaviours and needs, which are explored in the next chapter. A website that is not localised to meet these needs will serve to damage the brand it seeks to represent as it will convey a less than professional approach that Chinese users may find amateurish or even potentially insulting.

Search engines
Baidu has for many years been the main go-to search engine for Chinese audiences. In 2014, Baidu was used by 92.1% of search engine users.

The second most frequently used search engine was **Soso/Sogou,** used by 45.8%, and the next was **360,** used by 38.6%. Search services in China have rapidly evolved recently to easily rival Google in terms of functionality. They have developed from mere keyword search into natural language search, image search and entity search. In addition, through optimisation of algorithms and integration of users' search records, social interaction, geographical location and other information, personalised search has become prominent[20].

Social networks

Renren and Qzone are both considered the Chinese versions of Facebook. Chinese teenagers typically begin using social media with Qzone as they get older, then college students outgrow Qzone and move on to Renren, which is dominated by the young adult population. Douban on the other hand represents an alternative and more specialised social networking site, with usage driven more by niche cultural interest than simply by age.

Qzone was created in 2005 and is owned by Chinese social media giant company Tencent. It allows users to customize their blogs, keep diaries, send photos and listen to music. Gradually, Qzone has transformed from a personal space to the biggest social network open platform and its 2014 first-quarter figures put Qzone monthly active users at 644 million. Although Qzone is primarily a blogging platform, it also has similarities to Facebook, as brands can promote their products via fan pages.

RenRen is almost identical to Facebook – it has essentially the same user interface, layout, tools and functions. Just like Facebook, Renren users have an editable profile that features a 'wall' where others can leave comments. Users also have the ability to upload photos, videos, and more. Again, similar to Facebook, the site is open to third-party developers. This means an abundance of games and applications are available on the site, and online games are among the site's most popular features. As of June 30 2014, RenRen's social network had approximately 214 million activated users. With its large user base and similarities to Facebook, foreign organisations can more easily use RenRen to engage with Chinese audiences. However, RenRen has made some mistakes recently, such as almost entirely missing the mobile revolution, and as a result their user base has been declining.

Kaixin001 is a social networking platform designed for a more mature audience of young professionals. It has a membership that is heavily dominated by white-collar workers in the bigger cities. Users do not upload personal content but rather share information they find elsewhere, often relating to health, relationships and professional advancement.

Douban is a more specialised social networking site, attracting art students and those passionate about books, cinema, culture and music. Douban has a strong focus on cultural content and its primary objective when first starting up was for people to meet each other based on their common interest in books, music and movies. Douban boasts over 100 million registered and anonymous users, with nearly half actively using the site engaging in online discussions about film, music and books, either reviewing products or taking part in discussions with other users. It is perceived as a powerful platform for cultural content. Douban's users have been compared culturally to Guardian readers in the UK and in many ways represent a natural niche for the UK's arts, heritage and creative businesses. 92.5% of Douban users are in the 18–35 age group and 70% live in the major urban cities. They are highly educated and have strong purchasing power, more than 81% have a first degree or higher[21].

Douban consists of two major parts: Community and Groups. Community is a place where users can follow or befriend other users they're interested in, rate and post reviews on books, music and movies and comment on the others reviews. Recently, Douban has launched a book ordering service attached to its books rating system, through

which users can buy discounted books from online bookshops. Groups are forums founded by users to share information and comments under specific topics.

Micro-blogging platforms

Weibo, which means 'microblog', is the Chinese version of Twitter and is offered under several platforms. The two biggest players are Sina Weibo and Tencent Weibo. **Sina Weibo** known as the 'Twitter of China' remains at the heart of China's social media landscape but with its 61.4 million daily active users[22] it has over twice as many users as Twitter. Like Twitter it acts as a micro-blogging platform whose audience consists primarily of urban white-collar workers. While Twitter users often post about news, Weibo users tend to comment more on entertainment topics. Also Sina Weibo was well ahead of Twitter in providing users with the ability to include images and video. Whilst it also has a 140 character limit, Sina Weibo's 140-Chinese-character limit allows for a lot more information to be transmitted, typically the equivalent of 70–80 words.

Tencent Weibo is very similar to Sina Weibo in terms of functionality and demographics, users can share photos, videos and text within a 140 character limit. Tencent Weibo also acts as a social network, connecting people together – like Facebook. Tencent Weibo has about 200–250 million users.

International cultural organisations have begun to create Weibo accounts to engage Chinese audiences. For example, the Met Museum in New York set up a Weibo account in 2014 and as at September 2014, the team's approximately 60 Weibo posts had been viewed close to 3 million times[23].

Instant messaging platforms

Chinese instant messaging platforms are in essence similar to Skype and WhatsApp but are used in much broader ways. The 2 major players are QQ and WeChat.

First released in China in 1999 by Tencent, **QQ** is the granddaddy of Chinese social media and initially was a desktop-only messaging platform similar to Skype, offering comprehensive web communication functions such as text messaging, video chat, voice chat and features that allow users to send files on and offline. It has since expanded to include services such as social games, music, shopping, and microblogging. As it is an older platform, QQ has had to offer additional features in order to stay relevant – and it did so with a developed mobile version called
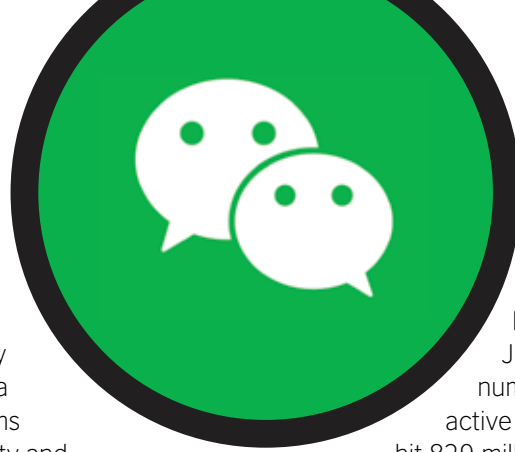
Mobile QQ. In June 2014, QQ's number of monthly active users (MAU) hit 829 million, with its mobile active accounts at over 400 million. Traditionally, QQ targets the younger generation such as students. Its user demographic has broadly remained unchanged over the past ten years.

China's fastest-growing platform **WeChat** or Weixin (owned also by Tencent) is an instant messaging app giving users free texting, voice messages and video calls. It is China's most popular app for interpersonal interaction and customers can use it to create their own profiles. Companies and brands can have a public account and engage with customers and fans directly. Almost 80% of users subscribe to public accounts. It can also act as a content provider or reading platform and more recently several Chinese publishers are now opening bookstores on WeChat[24]. Latest statistics show that WeChat boasts 468 million monthly active users around the world. 55.2% of users open WeChat more than 10 times a day. Contrasting with QQ's user base, WeChat mainly attracts a group of users that are more mature and high-end[25]. One of the main reasons for the rapid growth of WeChat is that it was born mobile and genuinely adapts to the trend of mobile Internet. It competes with Sina Weibo as China's most popular social networking platform but audience online behaviours and motivations for using each vary, as is further explored in Chapter 3.

Image sharing platforms

Instagram had eluded China's Internet censorship a lot longer

than a lot of other Western technology apps and had a significant Chinese audience following. However, it became inaccessible from China at the end of September 2014, due in all likelihood to the ongoing pro-democracy protests in Hong Kong[26]. Since then it's not entirely clear if a local Chinese platform has adequately replaced Instagram as a hub for image sharing. A search for various Chinese image sharing apps in the immediate period after the Chinese government's Instagram block didn't show any significant increase in downloads and use. Some commentators have indicated that the likely explanation for this is that users were probably posting and sharing their photos on WeChat, as it provides simple set of photo editing tools, stickers, and filters for pictures posted on users' 'Facebook wall style' Moments feed via a companion app called StoryCam. StoryCam and WeChat might not be exact equivalents for Instagram but it's suggested that they do enough to meet the needs of Chinese users who were using Instagram[27].

More recently however, a local photo sharing application called Nice has been attracting increasing user attention and has received significant capital investment. Nice has several attributes that could draw former Instagram users such as a very simple bilingual user interface and like Instagram allows users to capture a picture, upload it, edit and add filters and then post it. Other more distinctive attributes respond more to Chinese audience needs, for example a tag-based direct messaging feature allowing users to communicate in private with other users they

come across through tags[28]. In addition the app uses WeChat login and has sharing options for WeChat Moments, which should make it easier to gain traction[29].

Video sharing platforms
Youku, meaning 'excellent and cool,' is the second-largest video site in the world after YouTube. Youku has partnered with over 1,500 license holders, including television stations, distributors and film and TV production companies in China that regularly upload media content on the site. Whilst very similar to YouTube there are some distinct differences. While YouTube's videos are primarily user-generated, 70 percent of Youku's content is professionally produced. Youku also primarily features 'longer' videos, rather than short clips or music videos. A similar rival platform, Todou, was bought out by Youku in 2012 to become the biggest video hosting group in China. Other major video sharing websites include iQiYi, Letv, and Sohu.

2.4 Legal barriers to market

The main potential legal barriers to the Chinese market for UK art and heritage organisations relate to piracy, web domain and content standards and import bans/quotas.

Piracy
Piracy is embedded in Chinese markets, with counterfeit goods rife. It is commonly culturally referred to as 'shanzhai', which relates to the imitation and piracy of name brands[30]. According to the Organisation for Economic Co-operation Development (OECD), 'Asia emerges as the largest source for counterfeit and pirated products, with China as the single largest source economy'[31]. Whilst the impact of piracy has been a particular challenge for the literature, film, TV and music markets, piracy levels do vary by sector. For example Priest contrasts the success of online video in combating piracy in China against the failures of the music industry[32].

There are however signals that piracy is beginning to be countered in China. The greater availability of a variety of works, say via a developing e-book market, is seen as a negating factor to high levels of piracy. Also the Chinese government is finally beginning take action, recently following up its commitment to stronger regulation on copyright with a new Law for Protection of Rights and Interests of Consumers. This new law puts greater responsibility onto sales platforms responsible for selling pirated books and other cultural content[33].

From a creative industry perspective an arguably larger

obstacle, especially for digital content, is low willingness to pay[34]. Of course, this cannot be completely separated from piracy, though it also reflects other factors such as price competition between online retailers. Either way, low willingness to pay has particular implications for UK content, which is likely to have niche, rather than mass, appeal and consequently could find it hard to rely on high volume alone to be commercially viable.

Web domain and content standards

Registering a web domain with a.cn suffix will improve search engine performance in China and prevent a domain name from being pirated by someone else. However Chinese law states that only Chinese-registered businesses can own a.cn domain name. This law can be bypassed by requesting a reputable local marketing agency or law firm in China to register the.cn domain.

Websites in China must be fully compliant with Internet content regulation. Any website with a commercial element must have a valid ICP Licence (Internet Content Provider) and Internet Service Providers are required to remove any commercial websites that do not hold valid ICP licenses. Foreign businesses have to set up a partnership with a local Chinese company in order to register.

Import quotas

China's rigid import quota systems have mainly affected foreign film and television imports, although this is beginning to loosen up. In 2012 China enlarged its quota for revenue-sharing imports of foreign films from 20 per year to 34 per year and there is recent discussion to increase this by 10 more movies to include art-house movies and Oscar winners[35].

These quotas however begin to look redundant in the face of online channels enabling film and television content to become increasingly available. In recent months there has been an increase in cracking down on online content[36], and increased discussion about imposing a quota system on the licensing of overseas programs by video websites[37]. Whilst this has yet to happen, Chinese authorities have established other barriers such as requiring streaming sites to register for a 'publication license' for imported films and TV series.

2.5 Political barriers to market

The primary political barrier for arts and heritage organisations in China is censorship, which influences some of the legal challenges described above.

Online censorship

The most relevant form of censorship is Internet censorship, with China host to the world's most sophisticated Internet censorship mechanism, known as 'The Great Firewall of China'. This significantly limits the places people can go online (blocking many non-Chinese platforms such as Facebook, Twitter and Google) and what they can search for and discuss. However many Chinese online users have been able to successful skirt these online censorship barriers by using Virtual Private Networks -VPNs - although Chinese authorities began clamping down on this early in 2015 by blocking many of the popular VPNs.

Artistic censorship

Artistic censorship can be broadly categorised into three major fields of difficulties that artists and arts producers have faced in China[38]:

- Political censorship of art – this is perhaps what receives the most attention in the West, for example the censorship of Ai Weiwei's work

- Moral censorship of art – the most frequent censorship of art is rooted in the moral sphere. The naked body, sex and sexuality are sensitive subjects. This form of censorship has been used by Chinese authorities recently to justify challenging the wider spread of foreign TV shows via digital platforms such as Youku. Authorities have stated that programs should be removed immediately if they include inappropriate content such as promoting superstition, glamorising violence, sex or gambling.

- Aesthetic censorship of art – this form of censorship is commonplace but often overlooked. For example, prior to the 1970s, Impressionism was seen as bourgeois and not accepted, with the dominant aesthetic standard prescribed as socialist realism. Artists who wanted to borrow from the history of western art were not free to choose whatever style they preferred to use. Choices of art styles were an ideological issue. The paintings by Ai Weiwei and many members of the 'Stars' group of artists

Middle school class by Rex Pe, CC-BY 2.0

around the 1980s were purely impressionist landscapes and were controversial, not for being overtly political, but for challenging an aesthetic state censorship of artistic form.

Whilst censorship is of course a challenge, it can often be superseded by other political issues, such as economic protectionism and the desire to build local or national champions. These issues are reflected to a certain extent in the discussion on import quotas earlier, but interestingly they can often temper application of prescribed censorship rules. Consider the 2012 sci-fi blockbuster *Looper*, a Sino-American joint production involving time-travelling hit men which seemingly broke many of the Chinese State Administration of Radio, Film, and Television ('SARFT') censorship regulations by portraying graphic violence, murder and mayhem — some of

which occurs in Shanghai in the year 2074. Even its time travel plot elements could be viewed as breaking SARFT's regulations which prohibits the 'twisting' of culture and history and 'violation' of historical facts. Nevertheless, as a local co-production, *Looper* underwent, and passed, SARFT's obligatory pre- and post-production censorship reviews, and was released in cinemas throughout China. Commentators have suggested that perhaps in this case, censorship concerns were outweighed by the release of a high-profile Sino-Hollywood joint production[39]. More recently there have been a number of licensing/distribution deals pairing local Chinese partners with Hollywood, which might similarly challenge the censorship of foreign TV shows on online platforms highlighted earlier. For example Tencent has recently partnered with HBO to distribute drama and movies online in China[40].

2.6 Language barriers to market

China produces 20 million[41] new English speakers every year, more than the total population of many countries. Many recent estimates have placed the number of English speakers in China at over 300 million[42]. This would indicate that the perceived language barriers for UK online arts and heritage content are perhaps less pronounced than previously thought. However many commentators have also cautioned this by highlighting the lack of quality in some of the English teaching methods noting how classes can be extremely poor, teachers themselves not fluent in English and rote learning often being the preferred strategy[43].

3 UNDERSTANDING CHINESE ONLINE BEHAVIOURS

3.1 Online researching

Sourcing information

Chinese audiences have a hunger for much more information online than audiences normally require in the West. The Internet is increasingly the go-to place for Chinese audiences to source information, even for more traditional offline information types such as news and current affairs, with recent statistics indicating that 80% of Chinese Internet users access online channels to gather news[44]. Younger Chinese audiences perceive social media as an extremely credible source of information, greatly enhanced by the scepticism regarding the official media and leading to a growth in the prevalence of peer-to-peer content. Chinese audiences are far more susceptible to recommendations and suggestions online from other audiences, family, friends and key opinion-formers such as certain celebrities and individuals. In contrast they tend to be much more sceptical of 'official' reviews and ratings of products[45]. Internet word-of-mouth therefore plays a key role in sourcing, validating and using online information.

Online searching

Unsurprisingly, online search is a massive activity of China's online population. In December 2014 China had 522 million search engine users, representing 80.5% of the overall population of Internet users. It also had 429 million mobile search users (77.1% of the online population). The average age for someone using search engines

in China is 25, 10 years younger than the West's average of 35[46].

Chinese online search behaviour is based on thoroughly browsing search results rather than skimming information. Usually they look beyond first page results. Western audiences on average spend between 8 to 10 seconds before the first click. However, the browsing time is much longer for Chinese searchers on Baidu – 55 seconds, according to eye-tracking studies. This is due to the different way in which Chinese and Western searchers focus on the results page. For example, Western searchers generally focus on the upper left part of the page where the top results are. In comparison Chinese searchers generally have a much wider focus, scanning more information and ultimately taking more time[47]. Also Chinese

history of slow internet connection speeds. Whilst connection speeds have improved significantly in recent years, the behaviour has become embedded[48].

One of the key differences between online audiences in China and those in Western markets is that Chinese audiences are typically more susceptible to recommendations and suggestions from trusted online sources and Baidu's search results are perceived to be trustworthy. Additionally, while Western audiences have a tendency to be suspicious about the honesty and relevance of anything that is paid for, the reverse is true in China. Chinese audiences believe that if brands are willing to pay for their presence on the first page of a search engine, they must have something worth checking out.

	Chinese audiences	Western audiences
Average age for search	25	35
Focus on result page	Widespread, covering whole page	Focus on upper left part of page
Time spent on page	30–60 seconds	10 seconds
Popular search device	Mobile phone	Desktop/laptop
Search method	Prefer to choose from list	Prefer to type in words

audiences tend to open up lots of links in one go and then look at them in turn, which is probably a legacy behaviour derived from a

Some differences between Chinese and Western audience search behaviours (as at Jan 2014)[49]:

SEO also works differently in China. The Baidu spider is quite different from the Google bot, and generally

Once on a website, Chinese audiences have very different needs as regards the design and usability of the website than Western audiences.

does not crawl deeper than three levels within website structures. Websites that have thousands of pages indexed on Google might only have hundreds that index on Baidu. The ranking algorithm is also different on Baidu. Many Western brands do not even have first page visibility for their own brand names. This is primarily due to a Google-centric SEO strategy that does not work on Baidu. Google generally is looking for 'content' when in many cases Baidu is looking for local inbound links[50].

Online browsing
Once on a website, Chinese audiences have very different needs as regards the design and usability of the website than Western audiences.

Generally there is a slower typing speed in Chinese compared to English or other Western languages. This is because a phonetic typing system is usually used when typing in Chinese and entering Chinese characters this way can often be slow as there is so much ambiguity for each syllable. As a result onsite searching is often abandoned in favour of finding a link to the user's destination on the

home page[51]. Therefore Chinese websites often contain lots of information on pages and/or full site-maps of links to most pages on the site. Home pages also tend to be longer to accommodate these extra links as well as to respond to Chinese audiences' extra patience when scanning and searching for information[52]. Chinese online audiences are used to this format, so are less susceptible to information overload than Western audiences. Although this content-heavy approach might turn off Western audiences, in China the reverse is true. If a landing page doesn't contain enough information they are more likely to think the site has little value and dismiss it. Scrolling website text on Chinese websites is very common, both as a reason to get more movement on the page but also a valuable means of displaying more information in the same space[53]. Chinese websites also tend to look cluttered due to the distinctive nature of Chinese text. Chinese characters are formed of many strokes and there are no capital letters and no spaces between characters, leading to a cluttered look.

Use of strong colours and animated graphics are very

prominent on Chinese websites and can be a little less conservative than on their Western equivalents. Chinese audience attention is more responsive to this but it means usability is frequently sacrificed on Chinese websites, with text that can be difficult to read. The range of palettes used also reflects the lower average age of Internet users in China. Western Internet behaviour studies have shown that users now actively screen out page elements like animated graphics as they have similar characteristics to adverts[54]. Whether this eventually becomes the case in China remains to be seen.

3.2 Online sharing
China has the world's most active social media population. The estimated number of active social media users as at August 2015 was 659 million, representing approximately 48% of the population. Of these, 87% (or approx. 574 million people) use mobile devices to access social media. Social media usage in China has in recent years dwarfed usage in other countries[55]. According to an April 2012 report released by McKinsey, 91% of those connected to the Internet have visited a social media site during the preceding six months, compared with 30% in Japan, 67% in the United States and 70% in South Korea. The report also found that Chinese Internet users spend more time on social media sites than their counterparts do in Japan and the United States. For example, users in China spent 46 minutes a day visiting social media sites, compared with 7 minutes in Japan and 37 minutes

in the United States[56]. Since then, with the large population of new Internet users coming online at any given time who are often introduced to particular social media sites by friends as their first way of experiencing the Internet, these statistics have increased dramatically. Figures as at August 2015 show that approximately 98% of Chinese Internet users are active on social media sites and that the average daily usage of social media now is 103 minutes. Indeed most Chinese audiences only experience the Internet through social media platforms[57].

Instant messaging and blogging
Instant messaging is the most popular online sharing behaviour in China. By the end of December 2014, there were 588 million instant messaging users, which had increased by 55.61 million from the year before, making it the biggest online activity in China[58]. This popularity is demonstrated by WeChat being the fastest growing social media platform, offering a much more intimate and private social networking experience than is common for many Western audiences.

This desire for more private, one-to-one communication contrasts with the public-facing nature of another popular Chinese online sharing activity: blogging. Starting from 2002, blogging in China developed out of a desire for greater self-expression in response to a controlled and censored media environment. Early blogs had the attributes of both self-media and interactive media, serving as an important platform for information exchange and self-expression. With the rise of micro-blogging, the interactive attributes of blogs have been weakening gradually. Today, most bloggers are social elites, the content is more and more professional, and blogs have become much more like conventional publishing sources. Micro-blogging platforms have taken over the role of provider of on the ground information in China's rarefied media environment. Just like Twitter, Weibo allows for immediate distribution of information from grassroots sources and now arguably represents the most efficient way to keep informed about current affairs in China.

Potential cultural drivers behind online sharing
A private desire for one-to-one exchange and a public desire to diversify the media and information environment represent two contrasting drivers for China's massive social media participation.

Some commentators, on the other hand, have focused on this participation being driven by the collectivist ideals of Chinese society. In contrast to Western cultures, where people are defined more by what they've accomplished and individual expression is encouraged from an early age, collectivism is inherent in Chinese culture and is a product of a traditional Confucian society. This prescribed that for Chinese society to operate smoothly, it was necessary to subject one's own desires to the greater good of the group[59] and people didn't exist independently of one another. Instead, an individual was defined by his or her relationship to the group and understanding the nature of these relations, known as 'guanxi' was vital. Banfe, for example, argues that Chinese web based communications generally, and instant messaging in particular, "is perfectly suited to China with its collectivist, high context culture, characterized by hyper sociality and guanxi networks"[60].

There are however challenges to this position, some commentators[61], [62] point out that Chinese online activity remains largely incompatible with Confucian values, whilst others challenge the collectivist notion of Chinese society. For example Metzeger explores the differences in 'civil society' between China and the West and identifies the lack of intermediate, participatory institutions in Chinese society[63]. Others point out how Chinese online discussions are anything but harmonious and rather are an important outlet for public dissatisfaction and anger, with trolls or 'penzi' (spammers)

A private desire for one-to-one exchange and a public desire to diversify the media and information environment represent two contrasting drivers for China's massive social media participation.

DSC_4581 by Francesco Crippa CC-BY-2.0

commonplace[64]. Ultimately it is impossible to develop broad generalisations for Chinese cultural motivations behind online sharing, Chinese society is far too complex for this. However it is important to not lose sight of potential distinctive needs and consider their impact on a case by case basis.

Online image sharing

Online image sharing is another behaviour that is massive in China. On a purely observational level this is unsurprising given the huge Chinese obsession with taking selfies. China has had numerous viral 'selfie trends' such as the 'belly button selfie', consisting of people attempting to touch their belly buttons by twisting their arms behind their back; and the 'hairy armpit selfie' which encouraged Chinese women to submit photos of their unshaven legs, armpits, upper lips, etc. as a feminist campaign against societal body image pressures[65]. Even Chinese leaders such as President

Xi Jinping and Premier Li Keqiang have published selfies, whilst selfie stick usage is so commonplace amongst Chinese tourists that earlier this year Beijing's Forbidden City announced a ban on selfie sticks to protect the relics. Chinese engineers have even developed a 'selfie drone' that can, controlled by a mobile phone, take selfies from different heights and angles[66]. Some have suggested that pictures (alongside games) were the primary drivers behind the early development of the Chinese social web. Not only are cameras (and now camera phones) a part of the young Chinese population's lives, but photo editing has for a long time been a central component of Chinese digital habits. Long before Instagram was launched, Chinese social networks already integrated photo-editing tools[67].

On a deeper level it's interesting to reflect on how much of this online image sharing activity might be influenced by Chinese

society's perceived pursuit of 'face'. This broadly relates to social image and reputation. On the one hand there is a fear amongst Chinese audiences of posting or sharing images that might harm perceptions of them amongst social groups or friend circles. For example, one of the suggested reasons why Chinese 'burn-after-reading' applications like Snapchat have failed to achieve the same as popularity in China is because Chinese audiences generally wish to maintain an image of showing their best sides to their acquaintances at all times. In contrast Western audiences using Snapchat are generally used for generating or subverting playful images of themselves amongst their friends and families. Interestingly, adjustments have been made to some Chinese 'burn after reading' sites to better meet the needs of Chinese audiences in this regard, such as basing it on a network of strangers rather than acquaintances and not limiting it

to photos only. On the other hand, the psyche of 'face' is considered in the context of maintaining cultural and social capital linked to the growth of upper and middle classes and luxury trends in Chinese society. The Chinese nouveau riche snap and share photos and take videos of their extravagant trips, meals and luxurious purchases to showcase their societal status and economic well-being. Similar hashtags to those of 'The Rich Kids of Instagram'[68] can be found on Chinese social media as well.

The influence of 'face' on online image sharing is unclear and whilst we should consider its impact it is also important, as in the discussion earlier about collectivist motivations for sharing, not to assume that every online interaction will be influenced by a version of it. Studies exploring Chinese consumer purchasing decisions have identified that the relative importance of 'face' will vary with context[69], and the same could well be true of the online space.

Viral sharing
Building on the discussion relating to 'viral selfies', the gigantic user base of native Chinese social platforms means that the reach and speed of viral social media interest can potentially dwarf anything seen on Twitter or Facebook, with brands doing everything they can to ride the wave of viral content in China. For example when Fan Bing Bing and Li Chen, one of China's most famous actresses and her

co-star in a popular TV series, announced their relationship via a simple selfie on Weibo, this quickly went viral, being shared nearly 1.6 million times and generating 6.6 million 'likes'. It equally quickly became a branded moment, used immediately by three brands in their marketing campaigns: the Lenovo phone used to post the message, the $530 Cleopatra-style wig worn by Fan Bing Bing and the L'Oreal lipstick she used[70].

Similar to popular social media content on non-Chinese channels, it is impossible to predict what forms the 'secret sauce' for viral content in China. Tapping into emotions has often been one of the main strategies of social media marketing campaigns in China[71] and research by Beijing University identified that whilst Chinese Weibo users were very responsive to sharing driven by emotion, they were far more likely to share or echo angry sentiments than messages containing sadness, disgust or even joy[72]. Reproducing popular online themes in the West, like fashion vlogging, has also proved popular on Chinese social media, for instance beauty vlogger Little B has garnered over 1 million views for her video on how to do 'natural make-up' on Youkou[73]. But these examples just provide a steer to what can happen; they cannot predict that it will.

What is more certain is that in the same way that viral content can spread far more rapidly and further on Chinese social media in

comparison to Western platforms, it can as rapidly be forgotten. The fleeting nature of viral content is therefore much more pronounced in China, with Chinese audiences arguably even more partial to short bursts of obsession followed by impartiality than Western ones. One recent viral hit on Weibo was BuzzFeed's multi-part Brother Orange story[74], started when an American man, Mat Stopera, discovered via his iCloud account that his stolen iPhone was posting photos of a Chinese man in an orange grove (Brother Orange). He published this on Buzzfeed, which then got picked up on Weibo and Chinese social media users launched a successful search to find the man in the orange grove. Stopera rocketed to fame on Weibo and then subsequently visited Brother Orange in China, to much publicity in China. Stopera then published this whole story again on Buzzfeed, leading to more widespread social media activity in China but also in the US, ultimately leading to Stopera appearing alongside Brother Orange on the Ellen Show in the US. However, despite hitting these heights of virality, interest then rapidly waned. This was evidenced by a lack of interest in BuzzFeed's own official Weibo account, which had been discussing the Brother Orange phenomenon throughout, yet attracted fewer than 3,400 followers[75].

3.3 Online reading
Online reading in China has been an established behaviour for a number of years and is only increasing with the increase in social media and mobile usage. For example the China Press and Publication Academy released the

report of the 12th national reading survey, which included reading on WeChat for the first time. The report showed that on average a Chinese adult reads on WeChat twice a day for over 40 minutes. Reading news, reading shared articles on WeChat Moments and reading articles published on WeChat official accounts represented 72.9%, 67.1% and 20.9% respectively[76]. Also the surge in mobile use has brought with it a surge in mobile reading, defined by China Publishers as 'the act of reading and consuming digital content on mobile devices'[77] such as phones, tablets, PCs, e-readers, etc. and which covers e-books, e-newspapers, e-magazines and mobile cartoons. Mobile reading hit its stride in 2012, with total revenues of 6.89 billion Yuan (£656 million), with the number of cumulative users that year surpassing 600 million.[78]

The rise of online reading has had obvious impacts on the Chinese online literature market. The China Internet Network Information Centre (CNNIC) reports that China had 294 million online literature readers in 2014, representing 45.3% of the Internet user population and representing an annual growth of 7.1%. This rapid development is attributed to the increase in mobile phone use in China. Online literature sites first emerged in China in 1990 and have grown rapidly since then, with companies like Shanda Cloudary and Tencent leading the way and making superstars of their authors. Readers in China now regularly access online literature, predominantly long-form serialised fiction, on their smartphones and tablets. In the past ten years online literature

sites have grown substantially and this publishing system acts in parallel to the traditional state-run Chinese publishing industry.

Audiences for online literature consist of 63.4% male readers and 36.6% female readers, mainly between 18 and 35 years old. Perhaps most striking is the depth of engagement, with 42.1% of readers estimated to access online literature more than three times a day. 39.3% of all online literature readers spend 30 minutes to an hour in one single reading, with just under 3% spending more than two hours reading. Online literature is evidently engaging readers[79] in China.

The size of the online literature market in China is in contrast to the e-book market, which has seen relatively slow adoption. In 2012, of the 414,000 books published in China that year, only 2.7% were e-books. This has been due in part to reluctance from Chinese publishers to make digital editions available, due to fears about piracy and disruption of their own print market. However this may be about to change with Chinese publishers reportedly looking to better understand the e-book market in response to Amazon Kindle's emergence on China's e-book market in 2013, which has pushed e-reader and e-book adoption. This may in turn bring down piracy levels with an increase in the amount and variety of available works generally being seen as a factor that reduces piracy levels.

The obvious language barriers, alongside the development of a niche Chinese online literature market and the slow take-up of the digital content form that is most

familiar in the UK, have made the ability of UK publishers to respond to Chinese audience online reading behaviours very difficult. But recent research by NESTA points to opportunities to do this via Douban and emerging business models for translated writing[80].

3.4 Online viewing

Online viewing of TV shows and other content is increasing globally but particularly in China, where by the end of 2014, 433 million users had accessed online video, representing 66.7% of the Internet user population[81]. Separate research showed that a third (33%) of those surveyed in mainland China watch content on a PC, laptop, tablet or mobile daily, in comparison to 25% of those surveyed worldwide[82]. This trend is enhanced when considering younger Chinese audiences with the Internet firmly established as their preferred platform for watching video content. A study of the viewing preferences of younger Chinese audiences found that 84% of respondents ranked video streaming and downloading as their favoured method of video consumption. Indeed nearly half of them indicated that they have stopped watching linear TV entirely[83].

Duration of watching online video is also high with the majority of Chinese online audiences, watching for over an hour a day[84], this is in comparison to less than 15 minutes spent by US audiences on YouTube. This behaviour has led to the prevalence of long-form online TV content in China. The Interactive Advertising Bureau found that 71% of smartphone/tablet owners in China watched full-length TV

While these changes in flexible viewing practices began in international television systems, their impact is nowhere as obvious as in China where audience online viewing behaviours are already so established.

episodes at least weekly on their handsets and 27% did this once a day or more, far more than their counterparts in the US[85]. Rather than the short amateur videos (e.g. of cats) that are widespread on YouTube, Youku is filled with longer form content up to 70% of which is professionally produced, in many ways presenting itself more like an online television station, and resulting in a boom of companies that focus purely on online video.

Whilst mobile has recently become the preferred device in China for watching online videos, with 71.9% of Internet users choosing to use mobile phones to watch online video, content is accessed on multi Internet-enabled smart devices, especially through increasing use of second screens. Many younger Chinese audiences are especially attracted to shorter 'transmedia' formats that can be viewed on 'second screens' and enhanced by 'TV everywhere' apps, which make it easy for content to be shared interactively and instantaneously with friends. Smart devices allow audiences to be users and content generators as the tag line of BesTV, one of China's new breed of content providers puts it: 'from watching TV to using

TV'[86]. This is not surprising since many of the growing Chinese film content companies, such as Baidu, Alibaba and Tencent (dubbed 'BAT' in the Chinese press), are basically technology companies.

Home remains the first place for most Chinese people to watch online video, which alongside this 'using TV' trend, foretells the rise of Internet enabled TV in China as the centre of a multi-platform home entertainment experience. In 2013 Internet companies began to launch their own Internet TVs and set-top boxes, which have brought changes to the living-room entertainment ecology. Internet-connected TVs will play a central role in the living room in the future.

While these changes in flexible viewing practices began in international television systems, their impact is nowhere as obvious as in China where audience online viewing behaviours are already so established.

3.5 Online gaming

Online gaming in China is massively popular, with 58.1% (377.16 million) of the total Internet user population and 44.6% of

mobile Internet users playing online games. Levels of engagement are also very high with 35.5% of online gamers playing for more than two hours each day. Games involving role-playing, combat, shooting and real-time strategy making are preferred by most Chinese game players[87].Due to a long time ban on gaming consoles in China the majority of online game players use established Internet-enabled devices like desktops, laptops and mobile for game playing. This ban was partially lifted in 2014 and was completely lifted in July 2015, with Xbox One PS4 launching in China. PC games are easily pirated and so have been overwhelming market leaders in the Chinese gaming industry, however recent analysis[88] of the Chinese gaming industry suggests that PC games are likely to lose that position to smaller-screened competitors due to the massive growth in Chinese mobile gaming. PC games still have a comfortable lead, but growth is slowing to a halt while mobile is just starting to take off. To illustrate the rapidity of this growth, total sales of mobile games jumped by a staggering 400% from 2.5 billion Yuan in 2013 to 125.2 billion Yuan in 2014. The analysis also shows that there are now roughly three times more mobile gamers (365 million) than PC gamers (120 million). About half of these mobile gamers only joined that group in the past couple of years, so the market still has a long way toward maturity.

4 UNDERSTANDING CHINESE CULTURAL INTERESTS

4.1 Connecting with Chinese cultural interests

Foreign organisations seeking to better connect with the Chinese market face numerous obvious obstacles as detailed earlier in this report, but perhaps connecting with a market with a fundamentally different cultural make-up arguably presents the biggest obstacle.

In an exploration of the cultural barriers to the success of foreign media content, Rohn[89] identifies how various cultural barriers such as language, taste, relevance and style of production can be overcome if foreign companies such as arts organisations can begin to develop content strategies that either connect to universal themes (such as escapism and fantasy, universal emotions or global relevance such as environment) or that encourage audiences to project their own narrative values and meanings on it. This requires an evolving understanding of Chinese cultural interests, which led by an ever-shifting economical, technological and social environment, are in state of flux and rapid development.

This chapter therefore details some developing Chinese cultural interest themes, drawn from available literature, which could potentially shape the creation, selection or presentation of content from UK arts organisations.

4.2 Aspirational interests

The increasing globalised influence on China, alongside until very recently, a supercharged growing economy and increases in wealth, have fuelled an aspirational drive for success that challenges traditional Chinese interests. This has publically manifested in increased Chinese consumer choices for luxury brands and products such as high-end fashion or expensive single malt whisky, imbibed with cultural capital and status. In 2000, Chinese consumers accounted for less than 2% of global luxury spending in a worldwide market in which 140m luxury consumers spent some €130bn. By the end of 2015, it is estimated there are more than 350m global luxury consumers and the Chinese account for more than 30% of the €230bn in purchases in that year[90]. It's also fuelled aspirations to travel with a growing presence of Chinese tourists across the globe. According to statistics from the World Tourism Organisation, there were predicted to be 100 million Chinese outbound tourists annually by 2020, a figure that was reached in 2015[91]. Travel, food and luxury goods are among the most popular content that Chinese social media users create and share.

Yet this perception of Chinese aspiration as an unquenchable lust for luxury is a little too crude. The recent Chinese economic downturn, plus the reaching of a saturation point of luxury brands flogging themselves mercilessly to the Chinese market has led to a more subtle form of aspirational drive for products. Instead of brand logo, growing numbers of young professional Chinese living in cosmopolitan centres of China are buying into understatement, heritage and genuine quality over the now facile label of simply 'luxury'.

Indeed, for Chinese youth born in the 1990s a life of good quality is not simply about material consumption, they are also interested in cultural consumption[92]. Also the drive for consumerism has a more democratic connotation for younger Chinese than perhaps it would in the Western world. Unable to participate politically or rebel openly against authority, the young can take their work as consumer pioneers very seriously. Sharing their experiences and expertise helps them build important social capital and get recognition for providing value to their social circles[93].

growing numbers of young professional Chinese living in cosmopolitan centres of China are buying into understatement, heritage and genuine quality over the now facile label of simply 'luxury'.

Shanghai_1 by Hans Johnson, CC BY-ND 2.0

UK arts and heritage content producers therefore need to tread carefully when tapping into this perceived desire for UK heritage, resisting a 'one size fits all' approach and being sensitive to understanding cultural nuances.

This bodes well for a lot of British art and cultural output, which not only often possesses a brand that can be leveraged to promote cultural capital, but also represents a certain standard of quality as well as, in many cases, the desired 'heritage' appeal. For example British television is considered a luxury brand in China such that "watching British TV... represents intellectual superiority and a breadth of knowledge"[94]. It also represents quality amongst other foreign TV markets and can more easily tap into the heritage appeal,

one reason why UK TV productions such as *Downton Abbey* and *Sherlock Holmes* have performed so well in China[95]. Having said this, it is also important to note that in China brand awareness can still remain quite superficial, for example there is as yet no obvious interest from the Chinese market in Julian Fellowes' (the creator and writer of *Downton Abbey*) other work, such as *Gosford Park*. Also what the Chinese may perceive to be British and of 'heritage appeal' could still differ quite significantly from British perceptions and

therefore might give rise to issues of uncertainty and adaptation (see section 4.4 for more on this).

4.3 Nostalgic interests

An interesting wave of cultural nostalgia has recently been bubbling to the surface in Chinese society. This has mainly focussed on the 1980s and has thus far been most apparent in film and television, diversifying the genre of historical drama that is generally dominated by Qing dynasty palace intrigue and the war against Japan. One of last year's most popular movies, *American Dreams in China*, centred on the friendship of three

classmates at Peking University in the 1980s and the founding of the English-language training centre. It presents a sense of possibility that had a hold over students in the 1980s. Likewise, a popular TV show this summer begins at a university in the late 1980s and follows a group of classmates through the intervening decade. Another show, *Going into the Seas*, recounts the experience of starting up a business in the 1980s and Post-80 traces the lives of people born after 1980 through the early 2000s[96].

Whilst this form of nostalgia could be driven by a generation of 40-year-olds looking back on their younger years, there is also an alternative wave of 1980s cultural nostalgia that taps into a younger demographic. This relates to Chinese audiences born between 1980 and 1989, known in China as 'baling hou', or 'post-eighties'. Curious genres like classroom-style restaurants have appeared such as No. 8 Hot Pot Restaurant in Beijing, which is designed exclusively for people born between 1980 and 1989 and where diners sit at old-style wooden desks rather than tables, and menus are a multiple-choice test. The same generational cohort has also contributed to the popularity of a few remaining state-run department stores[97], which predate China's economic reform and which have been rendered all but extinct by Western-style malls. Also in late 2010, in the eleven days after an online video featuring two young men performing Michael Jackson's '*Billie Jean*' was posted, the forty-two-minute film was viewed more than seven million times, provoking an outpouring of comments from mainly twenty and thirty year

old audiences who confessed to being moved to tears[98].

At first glance this perceived cultural nostalgia is a surprise when considered alongside the more modern aspirational interests prevalent in Chinese society (as discussed earlier). However the presence of both these contrasting interests may not be that peculiar when considered in the context of Chinese culture. A number of observers draw attention to the neurosis at the heart of Chinese contemporary consumerism, the tension between bold status projection and nervous protection of hard–won, easily lost material gains, underpinned by the strong institutionalisation of the family. This pull of family and tradition might be why reading within the home and learning a musical instrument are still trending leisure time activities in China despite the massive growth of online activities within the home, as learning and self-improvement are traditionally encouraged in Chinese society[99]. It might also be the reason behind the strong presence of textbooks and supplemental learning titles in the book market, symptomatic of the fiercely competitive educational system and family pressure to succeed. Perhaps, in this context, Chinese nostalgic interests exist as a rebalancing response to aspirational interests.

On the other hand these nostalgic interests, particularly those seen from the 'post eighties' cohort, might be derived less as a reaction to, but more as a direct consequence of, their aspirational interests; or more specifically as a consequence of modern aspirational pressures. Commentators have noted how

those born in the 1980s are likely to be predisposed to nostalgia, in that they often lead uncertain, uncontrolled lives and need to seek confirmation from the past. For example those born in the 80s represent the first generation of only children, as China instituted its one-child policy in 1979, and are thus arguably more prone to loneliness. They also came of age during China's transition to a more market-based economy, leaving them tasked with defining what it means to be both modern and Chinese. Now in their late twenties or early thirties, this generation can lead challenging adult lives, often being the sole financial providers for both their children and their parents, facing tough competition for scarce white-collar jobs and being unable to afford the rising housing costs in most cities. Perhaps for these 'post eighties', the demand for nostalgia is part of a broader search for individual meaning, particularly in reaction to the challenges of modern life. This reaction might be the reason behind newer Chinese literature that, far from being parochial or indeed traditionally nostalgic, touches on themes with more modern relevance and meaning. For example the modern pace of change, the loneliness and tensions of urban life, the angst of youth under pressure, the emptiness of a life spent in pursuit of material wealth and the challenges and opportunities of life's new technologically shaped landscapes[100].

4.4 Localised adaptable interests

The response to global cultural products by the local Chinese

Visit Britain.
The Shard / Zhai Xing Ta (A tower allowing us to pluck stars from the sky)

market is often to either copy wholesale or to firmly resist. The cloning of TV programmes and formats is an example of the former. Chinese television producers have borrowed from international programmes since the 1980s but it is only in recent years that entertainment formats (such as reality shows, talent contents and celebrity challenges) have become mainstream fare. Many channels have adopted similar entertainment programme strategies, exploiting the global diffusion of format ideas[101]. The Chinese literature market, on the other hand, has historically resisted foreign titles, authors and publishers through a fiercely local publishing bias[102].

But between these two extremes lies the opportunity to make a non-Chinese cultural offer more meaningful for Chinese audiences by supporting them to project their own localised narratives values and meanings upon it. This has

begun to happen in TV formats recently with China developing some interesting home-grown hits adapted from foreign formats, for example a nationwide competition in the vein of Great British Bake Off but based on calligraphy[103].

Foreign organisations are becoming more sensitive to these localised interests when shaping their offer. For example Visit Britain has recently responded to the Chinese habit of giving names to favourite celebrities, places and foods that describe what Chinese people think of them. Therefore Sherlock star Benedict Cumberbatch, whose name can be very difficult for Chinese audiences to pronounce, is known in China by the moniker 'Curly Fu', Curly because of the hair, and Fu being a Chinese derivation from Holmes. In a campaign to promote Chinese tourism, Visit Britain has been encouraging Chinese audiences to rename some of Britain's most famous landmarks.

The names include Wales'Llanfairp-wllgwyngyllgogerychwyrndrobwlll-lantysiliogogogoch, which is now referred to as Jian Feu Cun, meaning 'Healthy lung village'; the Shard in London, which is now called Zhai Xing Ta, meaning 'the tower that allows us to pluck stars from the sky'; and the Highland Games, which are referred to as Qun Ying Hui 'the strong-man skirt party'[104].

Other examples of foreign organisations adapting approaches to better meet the localised interests of Chinese audiences include when Dove China first imported the Real Beauty social media campaign to promote beauty among women of all looks and body types. Chinese consumers viewed the real women as overweight and unattractive. Dove switched tack and partnered with Ugly Wudi, the Chinese adaptation of the US television show Ugly Betty, to weave the Real Beauty message into story lines

and mount a number of initiatives, including a blog by Wudi and live online chats. The effort generated millions of searches and blog entries and increased uptake of Dove body wash by 21% year-on-year after the show's first season[105]. Also Max Factor responded to the Chinese habit of wearing anti-pollution face masks, by unveiling a campaign on social network Sina Weibo to find the best make-up looks to wear with an anti-pollution face mask. In the 'Smog-busters' competition, Chinese women were invited to upload photographs of their eye make-up while wearing one of the masks[106]. Arguably the arts, with their interpretative qualities, may provide a more malleable product for localised cultural adaptation

in this way. For example hip-hop, which despite some of its aggression that would usually not fit well within certain Chinese culture, has found an interesting localised market. China has not adopted the kind of aggressive, subversive hip-hop popular in the United States. Rather Chinese hip-hop has become a positive unifying force centred on positive themes and values in line with Chinese culture such as love and intimate emotion. For example the Chinese rap group Longmen zhen looks to inject Chinese culture into Western musical styles. They rap about love, peace and the everyday struggles

Arguably the arts, with their interpretative qualities, may provide a more malleable product for localised cultural adaptation

of life, rather than about the more familiar Western gangster tropes[107].

4.5 Niche interests

Traditionally much of Chinese cultural interest from an arts and heritage perspective has been shaped by a top-down state orientated approach. This is changing with the increasing prominence of more niche cultural interests. Obvious drivers for this are an emerging young population and a desire to explore new freedoms via technology. However, a lesser-known driver is the proliferation of soft pop culture across China caused by an overall lack of diversity and provision of culturally relevant leisure activities available to Chinese audiences, especially outside the major cities[108]. This abundance of soft pop culture is increasingly being challenged by Chinese audiences searching out substitutes for higher cultural endeavour. This has led to niche cultural activity trends across a wide array of differing arts markets, including photography, jazz and contemporary dance. Alternative arts and cultural activities such as sound art; puppetry and new classical, electronic or improvised music have also seen an increased popularity. These differ from the more traditional cultural activities fostered by many Chinese at the behest of

their parents, such as playing the piano or traditional calligraphy[109].

The increasing prominence of 'superfans', namely niche interest communities present on social media sites such as Douban, provides an opportunity to champion and promote niche interests. In many ways Douban is hardwired to create this type of superfan, by 'attracting a brand of user that is both discerning in taste and youthful in swagger, and through a range of mechanisms to reassure users that investing time to generate content is a worthwhile exercise that will promote quality'[110]. This includes the fact that posting a review on Douban is a core activity rather than an afterthought and so becomes more immune to biases, and a dedicated editorial team that tracks errors and punishes violations as well as algorithms that are constantly tweaked to safeguard ratings systems. Recent research into the literature market for British publishers uncovered a small number of 'hard core' fans on Douban who were far more engaged with British culture than other Douban users and occupy more prominent positions in their social networks as measured by their number of followers[111].

Whilst identifying and engaging with these superfans may appear to represent an invaluable opportunity for UK arts organisations to promote more niche cultural activity like puppetry, contemporary dance or sound art to Chinese audiences, there are significant challenges. Whilst Douban is very powerful within a narrow interest group, their attentions are largely focussed on

Hong Kong Cultural Center Panorama at Night by See-ming Lee, CC-BY 2.0

literature, music and film rather than other cultural products. For example Jo Lusby of Penguin China points out that Douban is one of the main ways audiences learn about their reading choices[112] and recent statistics show that one third of movie viewers are Douban users[113]. Also NESTA, in their analysis of connecting with these superfans, indicates that there are steep entry barriers to engaging them, requiring greater focus and commitment from cultural organisations than previously seen, including prioritising 'targeted, rather than mass engagement strategies which, our analysis at least, suggests will face deep challenges'[114].

4.6 Professional interests

An often obvious, yet often overlooked, driver for arts and

cultural audiences in the West is a professional interest in the arts. It is sensible to deduce that people who are interested in arts and culture are more likely to want to work within it, and vice versa those working in the sector are more likely to want to consume arts and culture. This is borne out by research of cultural tourism in Europe that identified the rise of 'busman's cultural tourism' where people working in jobs connected to the cultural sector tend to engage in cultural tourism such as visiting museums and galleries more frequently than other groups. For example one piece of research discovered that 30% of cultural tourists surveyed had an occupation connected with culture compared with about 3% of the EU population[115].

China's professional cultural sector is not at this stage of

development, but its professional cultural needs are being driven by a more fundamental urgency to service its explosive growth in cultural infrastructure and supply. This is particularly the case in the Chinese museum and gallery sector, which has recently seen a massive building programme. By 2014 there were estimated to be 3423 museums in China and increase in provision of 81% since 2008[116]. Many of these new museum and gallery openings are high profile, occupying huge spaces in prominent locations. For example the last few years in Shanghai have seen the relocation of the China Art Museum; the launch of the Yuz Museum and the relocation of the Shanghai Himalayas Museum (another private institution) to an enormous new space in Pudong[117]. This mushrooming museum sector faces uncertain times, accompanied

by large costs and in many cases low attendance figures, making even more urgent the need for professional capability to service and maintain this growth. A recent study of Chinese museums sector growth in The Economist identified that 'building up and displaying collections, planning exhibitions, training curators, conservators and other museum staff, and devising educational programmes lag far behind museum-building'[118]. The thirst for professional skills building in this sector is borne out by the interest in museum professional development publications such as Museum ID. Surface Impression, a creative digital agency, recently developed a Museum ID app[119] and identified significant demand from Chinese audiences. "We were really surprised to see loads of downloads coming from China which grew and grew till it was the number one country (even overtaking the US). We know there's a massive museum building programme there at the moment so think we might have tapped in to some demand for information from museum professionals there"[120].

Recent studies[121] have also identified a growing soft skills gap in China; such as those focusing on leadership, teamwork and personal motivation; across all industries, highlighting how this has often lagged behind investment in employment related infrastructure. This not only represents an opportunity for UK business (which has a relatively

advanced soft skills understanding) to help develop Chinese cultural sector soft skills, but also arguably an opportunity for specific arts and cultural related interventions in developing these skills.

Another way to consider Chinese professional cultural interests is through their drive to learn English. China is producing 20 million new English speakers every year[122]. Almost one quarter of students on full-time taught postgraduate courses at English universities are Chinese. This thirst for English language skills can often be the primary motivator for Chinese audiences seeking to engage with certain arts and cultural products and services. For example NESTA's recent case study of Chinese audience engagement with UK author David Mitchell on Douban identified that their motivations lay in language and translation, rather than in their loyalties to David Mitchell[123].

4.7 'Born digital' interests

Chinese 'born digital' cultural interests relate to emerging cultural formats that respond to the impact of digital changes on Chinese society, including new online freedoms, alternate sources of cultural production and the changing online behaviours of audience, as documented in Chapter 3.

For example interest in a variety of niche fiction-based literature genres has developed through the development of online reading platforms and behaviours. Dr Lucy Montgomery and Dr Xiang Ren, in recent research commissioned by The Literary Platform, identified how a fiction vacuum created during the Chinese state publishing system before reforms in 2009 nurtured a range of born-digital, direct-to-reader fiction platforms by-passing traditional publishing processes, and these fiction platforms have exploded in popularity with the shift to mobile. This in turn has shaped the style and format of the fiction being produced, read and commissioned and differing widely from that produced by the state-owned publishers. These are usually specific fiction genres, such as fantasy (focusing on martial artists and knights), science fiction, time travel, romance, mystery and urban; all serialised for digital platforms, and written in Chinese characters, which works well for mobile devices[124].

A similar development of alternative genres to fit these new digital platforms and behaviours can be seen in the Chinese film sector. Recent years have seen the growth in China of 'microfilms', small low budget films that are shot by amateurs and experienced filmmakers alike, lasting anywhere from 5 minutes to 20 minutes, and often hosted on video websites such as Youku. Microfilms have

proved popular because they are accessible to anyone with a smartphone, can be watched while on the move on subways and buses or held up in traffic and can be easily shared and forwarded. Also the online freedom that has created the environment for microfilms has enabled them to explore themes that are quirky, controversial and artistically bold, challenging the dull and staid output often generated as a result of strict film censorship of the state, studio domination and substantial commercial restraints. For example the microfilm *My Way* explored transgender issues, and was distributed in China via Youku where it quickly received more than four million hits and generated wide ranging debate[125]. Microfilms are now achieving more mainstream success in China with comedy *Old Boys*, a 42-minute microfilm that was released on Youku in 2010 quickly going viral and garnering about 75 million views, recently adapted for the big screen[126]. Also numerous microfilm festivals have taken place including in the UK[127]. However the challenge of Chinese censorship still proves an obstacle to this genre of film, with authorities in China recently announcing new regulations that require producers of microfilms to submit their real names when uploading content to local Internet.

The development of these microfilm formats is indicative of an arguably more radical born digital cultural change taking place, relating to the whole medium

of television in China. This is currently going through a state of unprecedented flux. Whereas in the past television in China was about making a successful show, producers are now looking to create content that is flexible and can be distributed simultaneously across different platforms and networks. Technology-enabled formats like microfilms or user-generated content are becoming the new currency of television as the technology sector integrates with storytellers. In this way the development of the Chinese online video market is very much a part of the development of a new Chinese television output, one that is trans-media in nature[128].

5 IN CONCLUSION

More localised research around Chinese audience's cultural and online content needs is necessary to build more nuanced understanding.

The potential Chinese market for online arts and heritage engagement is huge but, as demonstrated by this report, can only be embraced by UK arts and heritage organisations with a sophisticated understanding of Chinese audience needs. This requires knowledge of the Chinese online market, the common technology platforms, the arts and heritage activity of Chinese audiences and the barriers to market; but it also requires a deep understanding of audience needs: what drives Chinese online usage, why and how these online platforms are used and what motivates audiences to engage with these cultural forms. By opening up the discussion of Chinese audience in terms of market needs, online behaviours and cultural interests, this study has begun to do this.

There are some potential opportunities for UK arts and heritage to explore, for example utilising Douban to better understand and connect with a culturally engaged audience, using monikers to build engagement with cultural symbols to overcome language issues, meeting an emerging Chinese desire for cultural capital driven by understatement, quality and heritage or tapping into the exploding Chinese microfilm industry. At the same time there are clear challenges for organisations stemming from the huge differences presented by a Chinese audience. This is more complex than just overcoming changes in language, censorship or platforms. There are other more subtle, yet deeply set differences that need unpacking and responding to. For example differences in the way Chinese audiences search for, browse and share information; or navigating conflicting cultural approaches driven by changes in Chinese society from traditions to modernity, such as a desire for public broadcast vs. a desire for private communication or a need to promote 'face' against a need to preserve 'face'.

Ultimately this study can only widen the ways of thinking about Chinese audiences and signpost some potential opportunities and challenges. More localised research around Chinese audience's cultural and online content needs is necessary to build more nuanced understanding.

It is then for each organisation interested in engaging Chinese audiences online with their arts and heritage content to go deeper and consider which audience needs are most relevant to them, better understand what these really mean and interrogate any resulting opportunities and challenges that are presented. This cannot happen at a conceptual distance, but rather as a practical reality. It requires a desire to experiment and test out ideas, an openness to failure, an adaptability to iterate and a willingness to learn. It is these principles of learning through doing upon which the Fit for China pilot project is based and from where arts and heritage organisations can better understand how to engage Chinese audiences online.

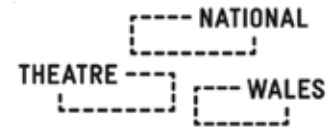# 6 APPENDIX 1: THE FIT FOR CHINA DIGITAL SHOWCASING PROJECT: SUMMARY

What are the project aims?

The Fit for China Digital Showcasing pilot project aims to build the knowledge of UK arts and heritage organisations to create, shape and showcase the best of British digital cultural content for online audiences in China.

Who's involved?

The project is a partnership between the British Council, Culture24 and Storythings. It involves 10 selected UK arts and heritage organisations who have (or have access to) existing collections of digital assets and have ambitions for repurposing these assets to create engaging digital content for Chinese audiences. The participating organisations are:

What's involved?

The project runs from Autumn 2015 to Spring 2016, and incorporates two collaborative workshops and an action research and development period. The British Council, Culture24 and Storythings will work with participating organisations to conceive, scope, plan, produce and evaluate a piece of online cultural content that is repurposed from existing digital assets, and that can be showcased to Chinese audiences using UKNOW, the British Council's arts platform in China and/ or any related Chinese social media channels if appropriate.

BRITISH COUNCIL

Culture24

STORY THINGS

What is the project's background?

This project has been conceived to build on the existing work that the British Council, Culture24 and Storythings have been doing to support UK arts and heritage organisations better engage audiences with their digital content.

The **British Council** through its Digital Showcasing programme is working to take more great arts and culture content from UK organisations direct to audiences online around the world. This is currently piloting in China with the intention to scale the programme for audiences globally.

Culture24 has been leading a dynamic series of collaborative action research projects called 'Let's Get Real' since 2011. It has been helping UK arts and heritage organisations get better at re-using and re-shaping digital content in order to meet the changing needs of audiences online.

Storythings have been inputting their expertise into recent Let's Get Real projects specifically advising on how to use digital storytelling tactics to meet changing audience attention patterns and behaviours.

Let's Get Real

7 END NOTES

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8 CREDITS

Report author: Sejul Malde

Report editors: Jane Finnis
and Anra Kennedy

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