

Screen Industry Snapshot Korea

Austrade Korea

26 September 2017



Australian Government
Austrade



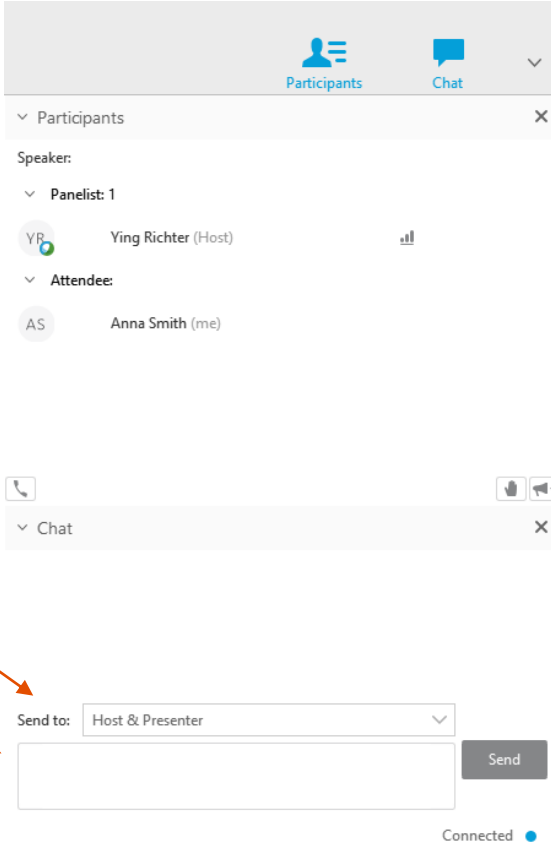
HOW TO ASK QUESTIONS

1. Select "Chat" function

2. Select "Host & Presenter"

3. Type your question here

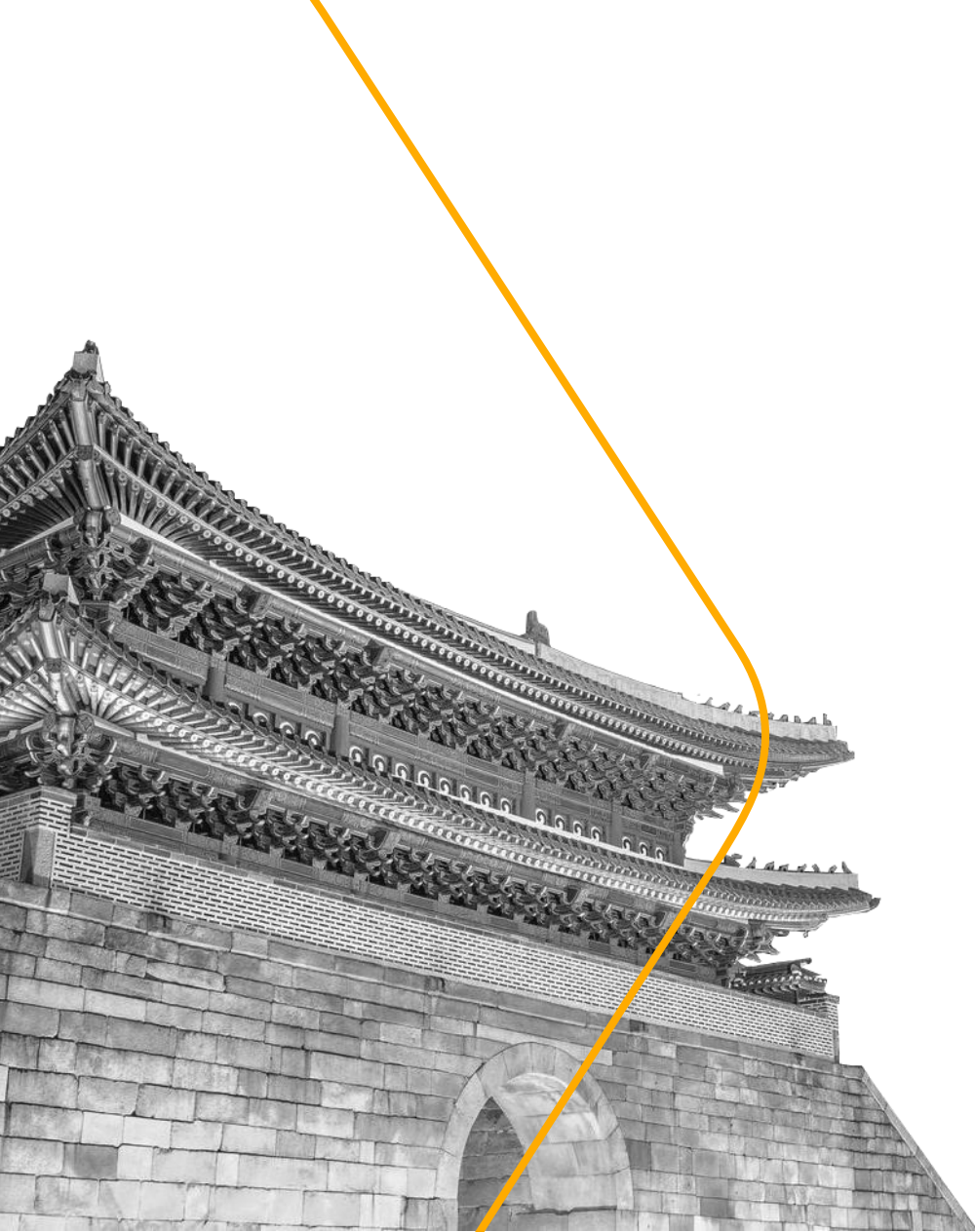
3. Press 'Send'



The image shows a Zoom chat interface with four instructional steps and arrows pointing to specific elements:

- Step 1:** An arrow points from the text "1. Select 'Chat' function" to the "Chat" button in the top right corner of the Zoom window.
- Step 2:** An arrow points from the text "2. Select 'Host & Presenter'" to the "Host & Presenter" option in the "Send to:" dropdown menu.
- Step 3:** An arrow points from the text "3. Type your question here" to the large text input field below the dropdown menu.
- Step 4:** An arrow points from the text "3. Press 'Send'" to the "Send" button on the right side of the text input field.

The interface includes a "Participants" list with "Ying Richter (Host)" and "Anna Smith (me)", a "Chat" input area, and a "Send" button. A "Connected" status indicator is visible at the bottom right.



Why Korea?

Business and Investment
Opportunities for Australia

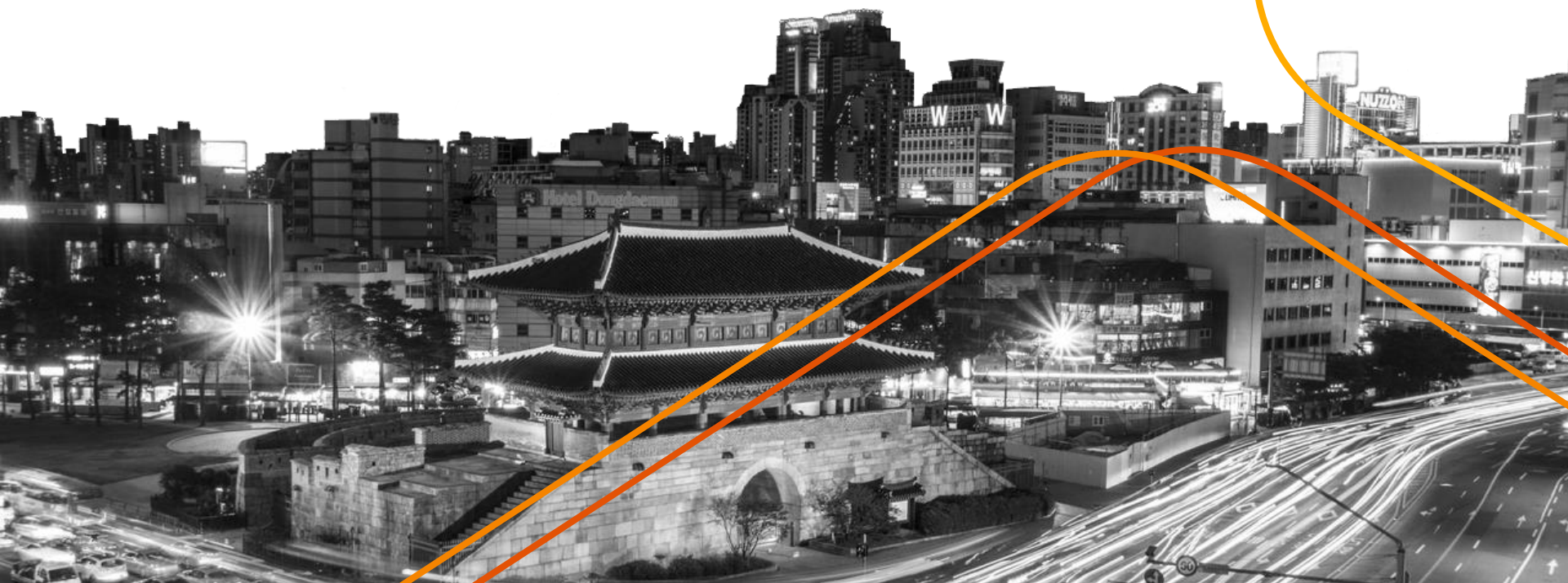


Australian Government
Australian Trade and Investment Commission



COUNTRY PROFILE

Republic of Korea





POLITICAL PROFILE



Capital is Seoul



Government is Unitary
presidential constitutional
republic



Head of the government is the
President Mr Moon, Jae-in of
the Democratic Party




His presidential term is 5
years, starting 2017.

ECONOMIC PROFILE: REPUBLIC OF KOREA

 **Population:** 50.8 million

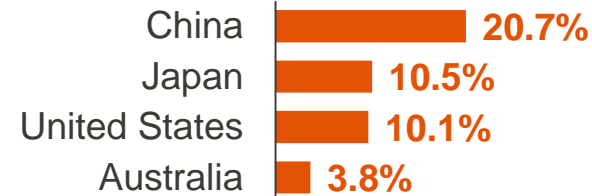
 **GDP:** US\$ 1.38 trillion

 **GDP per capita:** US\$25,990

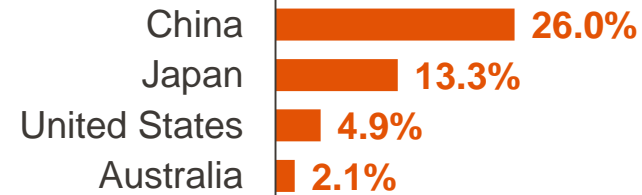
 **Sector strengths:**
Electronics, telecommunications,
automobile production, chemicals,
shipbuilding, steel



Import partners
(2015)



Export partners
(2015)



ECONOMIC PROFILE: **SEOUL**

- 📍 **Area:** 605.25 sq km
- 👥 **Population:** 10 million
- 📊 **Contribution to National GDP:**
22.1%, US\$ 304.9 billion
- 📈 **Sector strengths:**
Business and financial hub



KEY ECONOMIC AND SOCIAL CHALLENGES

Inflexible labour market ◆

Heavy reliance on exports – ◆
comprises about half of GDP

Import dependent on ◆
energy and raw materials



◆ **Social polarisation**

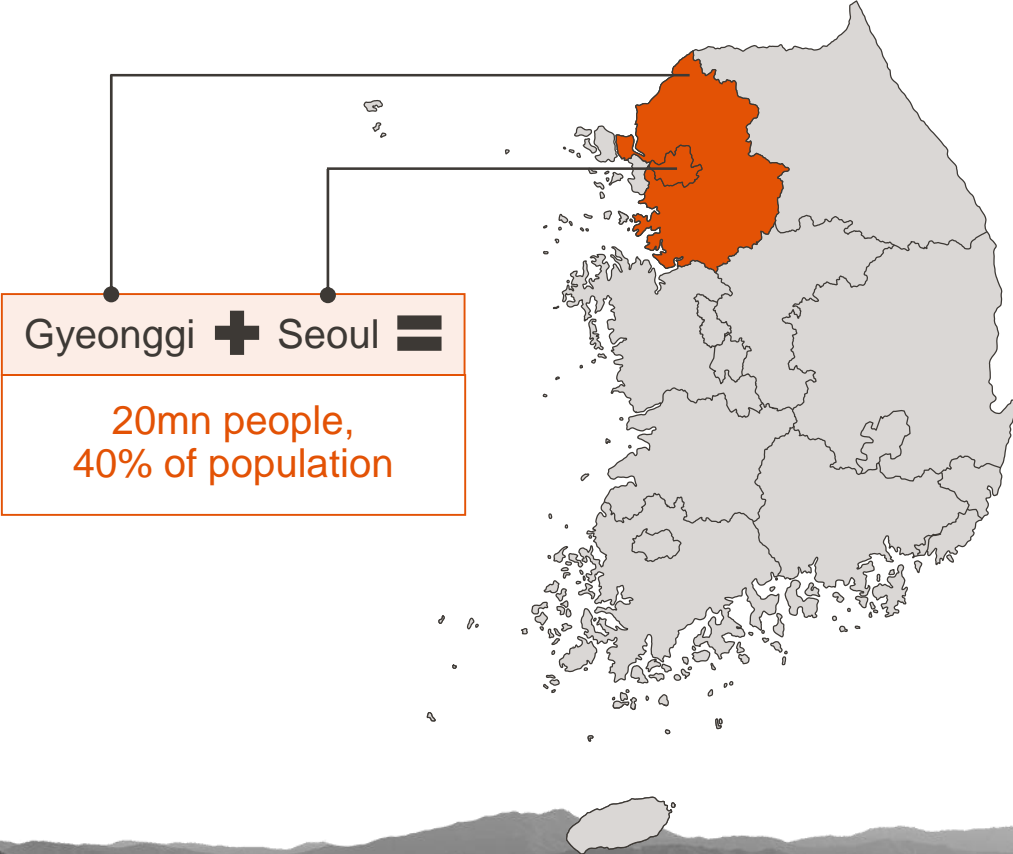
◆ **Environmental degradation** –
Air pollution, water management

◆ **OECD's fastest ageing population**

◆ **OECD's lowest birth rate**



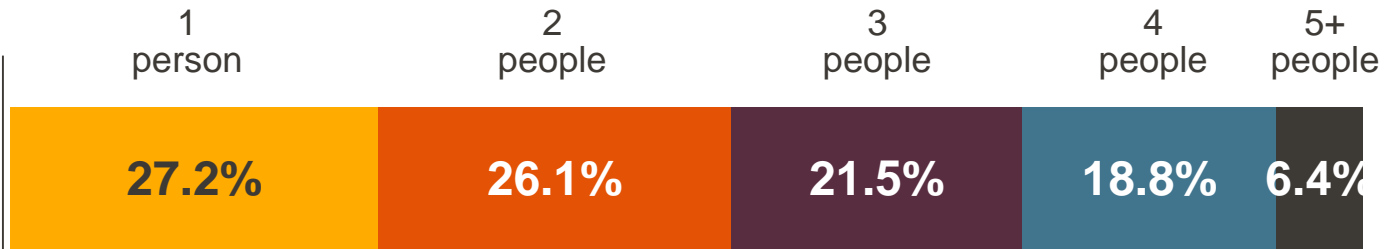
**KEY ECONOMIC
AND SOCIAL
CHALLENGES:
URBAN OVER-CROWDING**



DISTRIBUTION OF HOUSEHOLD NUMBERS IN KOREA



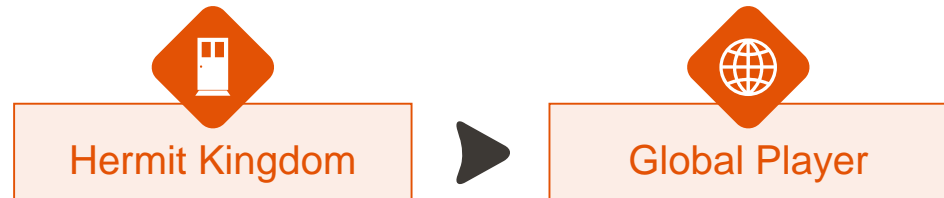
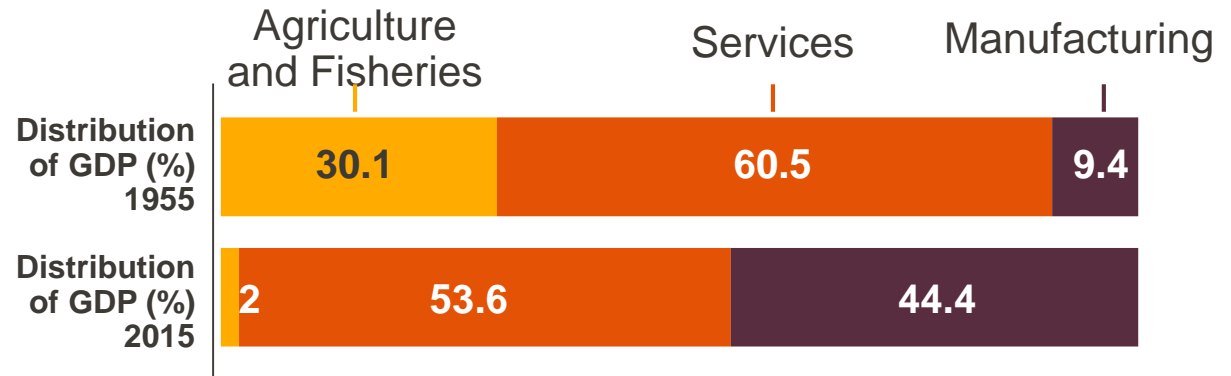
Number of
people per
household



Source: Statistics Korea, 2015



KOREA: AN ECONOMY IN TRANSITION



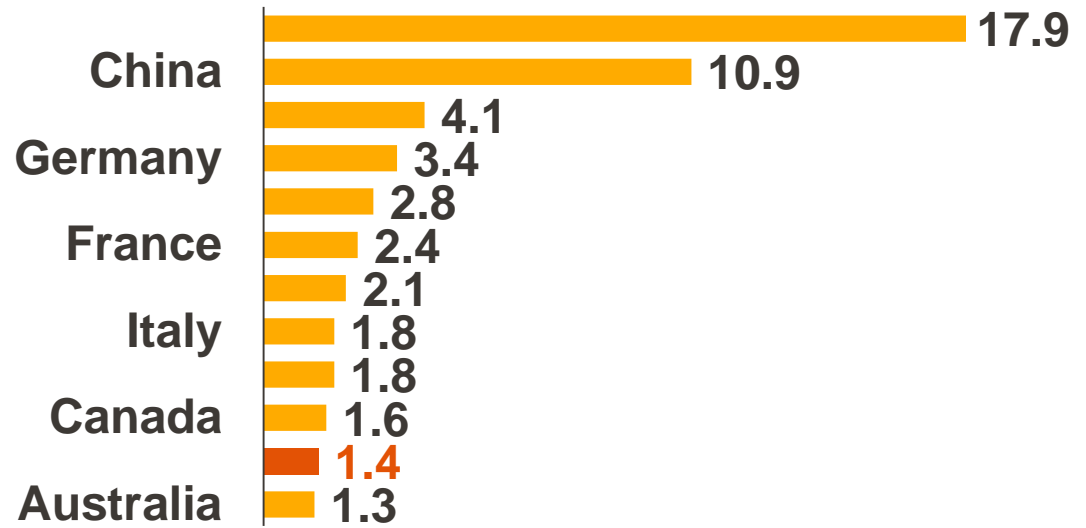
Source: Statistics Korea



KOREA: THE WORLD'S 11TH LARGEST ECONOMY



GDP (US\$ trillion)
of the top 12 economies (2015)



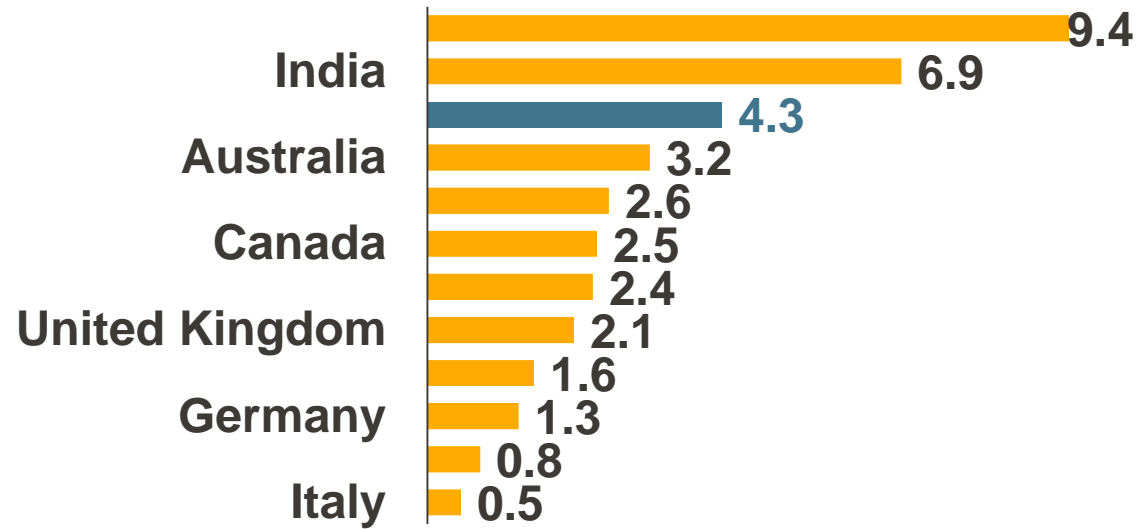
Source: World Development Indicators database,
World Bank, 11 October 2016



KOREA: CONTINUES TO BE A GROWING ECONOMY



Average growth rate (%)
of the top 12 economies (1996-2015)



Source: World Bank 2015



DRIVERS OF ECONOMIC GROWTH

Global expansion of large corporates – “chaebol”

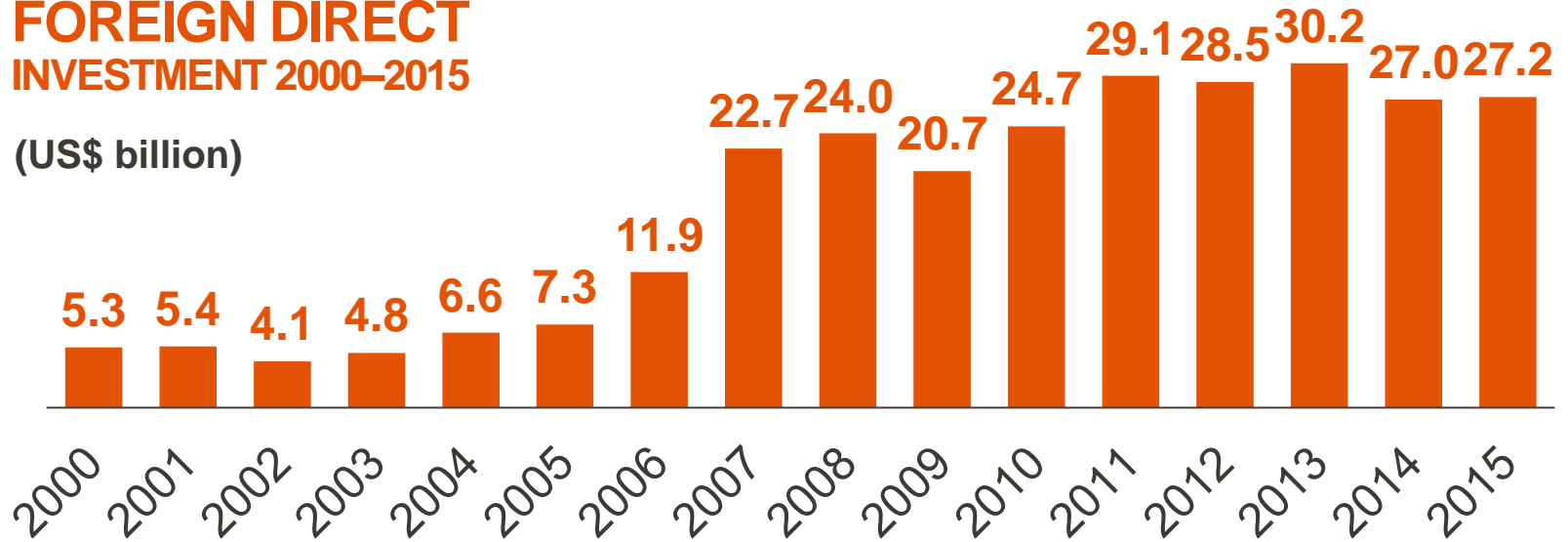


Account for over **80%** of Korean economy



GROWTH IN KOREAN FOREIGN DIRECT INVESTMENT 2000–2015

(US\$ billion)



Source: Overseas Economy Research Institute,
The Export-Import Bank of Korea, 2015



DRIVERS OF ECONOMIC GROWTH: GLOBAL EXPANSION



Destination of
Korean foreign
investment
(stock) in 2015

Source: Overseas Economy Research Institute,
The Export-Import Bank of Korea, 2015



DRIVERS OF ECONOMIC GROWTH: TELECOMMUNICATION TECHNOLOGY



Smart phone
users

91% of population



4G penetration
in Korea

97% network
coverage on LTE



4G average
download speed

120Mbps



Download time
of 800MB movie

3G: 2 min 25 sec

4G: 7 sec





Source: United Nations Commodity Trade, 2015

AUSTRALIA-KOREA RELATIONS

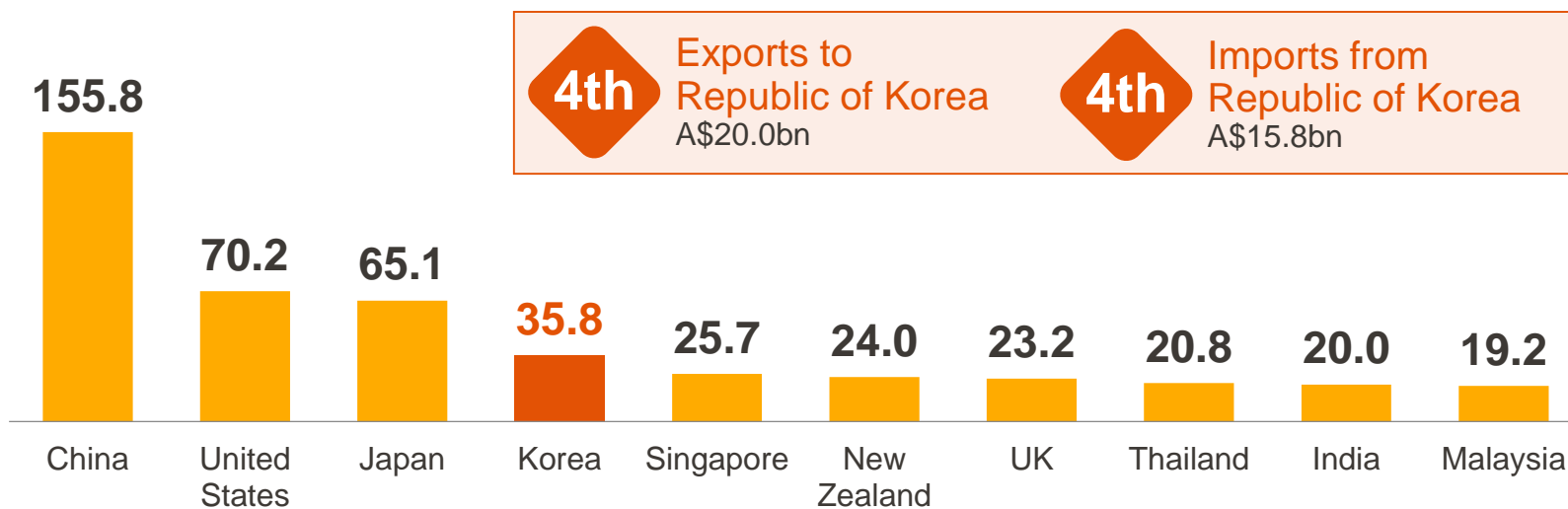
Potential to grow



KOREA: FOURTH LARGEST BILATERAL TRADING PARTNER



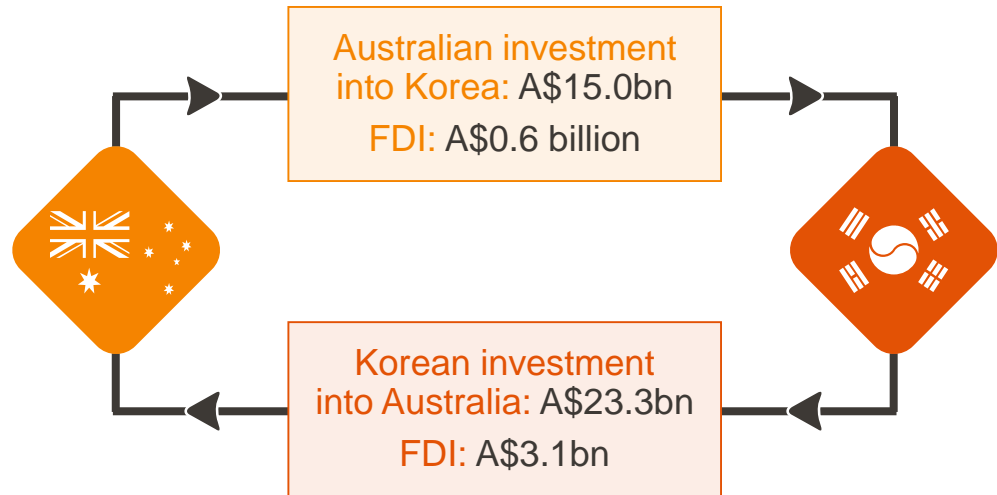
Australia's top ten two-way trading partners for 2015 (A\$ billion)



Source: Composition of Trade Australia 2015, published June 2016

AUSTRALIA-KOREA TRADE RELATIONS

Total two-way
Australia-Korea
investment for 2015



Source: Department Education and Training, Tourism Research Australia,
International Visitor Survey 31 August 2016, KOTRA Sydney



AUSTRALIA-KOREA TRADE RELATIONS



Source: Department Education and Training, Tourism Research Australia,
International Visitor Survey 31 August 2016, KOTRA Sydney



MAJOR AUSTRALIAN TRADE ITEMS WITH KOREA

Major Australian Exports to Korea



Coal **A\$5.1bn**
Iron Ores **A\$3.5bn**
Beef **A\$1.2bn**
Aluminum **A\$0.9bn**



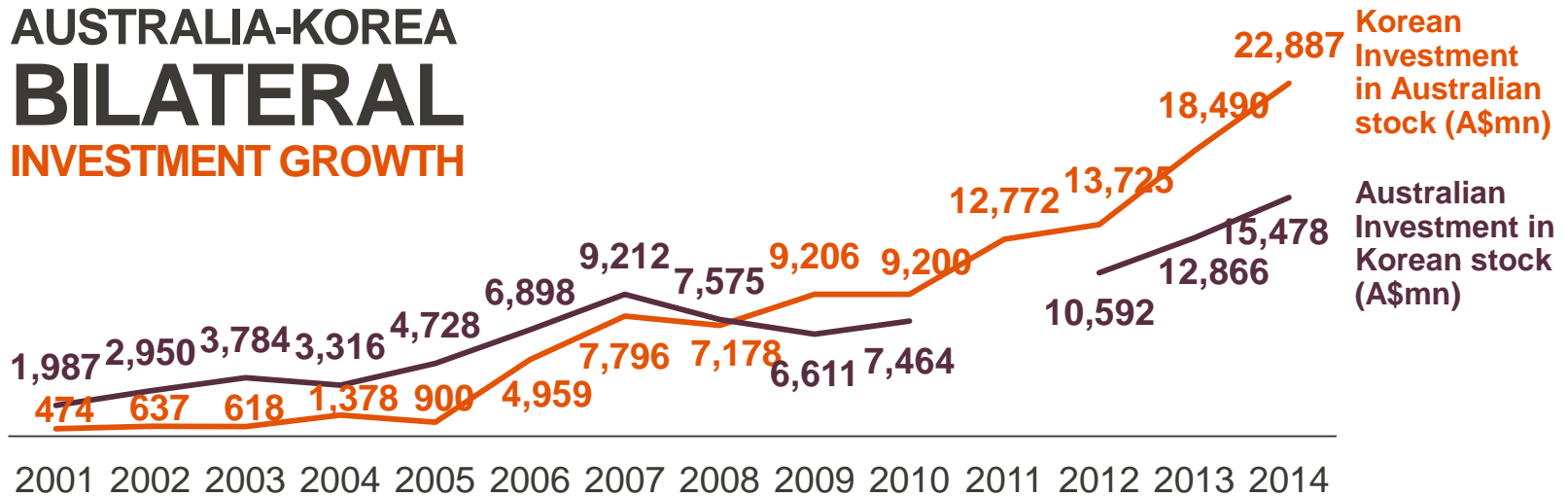
Major Australian Imports from Korea

Refined petroleum **A\$5.6bn**
Passenger cars **A\$2.2bn**
Civil engineering parts **A\$1.4bn**
Heating & cooling parts **A\$0.9bn**

Source: DFAT Country Profile –
Republic of Korea, (Published in June 2016)



AUSTRALIA-KOREA BILATERAL INVESTMENT GROWTH



Source: Australian Bureau of Statistics 2015 International Investment Position, all units AUD Million



**Korean investment
in Australia**
(Percentage of equity stake)

POSCO
12.5%
in Roy Hill

Mirae Asset
100% in
Four Seasons
Hotel in Sydney

KOGAS
15% in Santos'
GLNG Project

10% in Prelude
FLNG Project

MAJOR AUSTRALIAN SERVICES EXPORTS: 2015



10th largest
services
export market

7.3% growth (YoY)
A\$1.6bn in 2015



3rd largest
source market
of students

29,199 students
in October 2016
A\$784mn
in education-
related travel



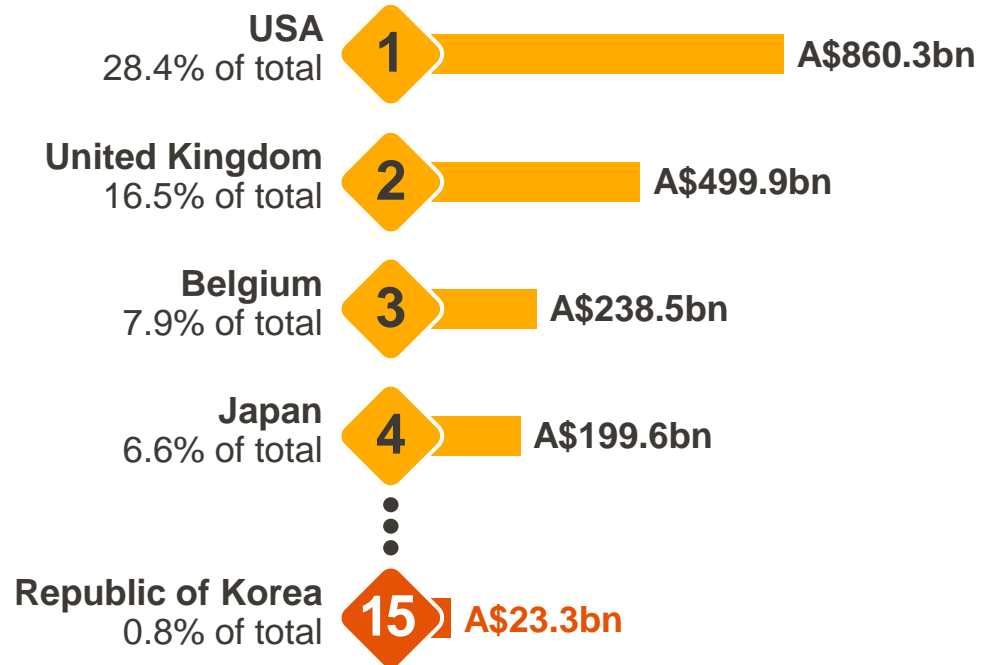
276,000 visitors
from South Korea
for 2015-2016

+28% compared
to previous year
A\$1.5bn in personal
travel expenses,
excluding education

Source: DFAT Country Profile –
Republic of Korea, (Published in June 2016)



FOREIGN INVESTMENT INTO AUSTRALIA (STOCK)



Source: Australia and foreign investment, DFAT 2015



KOREA-AUSTRALIA FREE TRADE AGREEMENT

KAFTA



KOREA-AUSTRALIA FREE TRADE AGREEMENT



Signed on
8 April 2014



Implemented on
12 December 2014



2017 is the fourth
year of KAFTA
implementation



KOREA-AUSTRALIA Audio-visual Co-production



Signed by Screen
Australia and Korea
Film Council



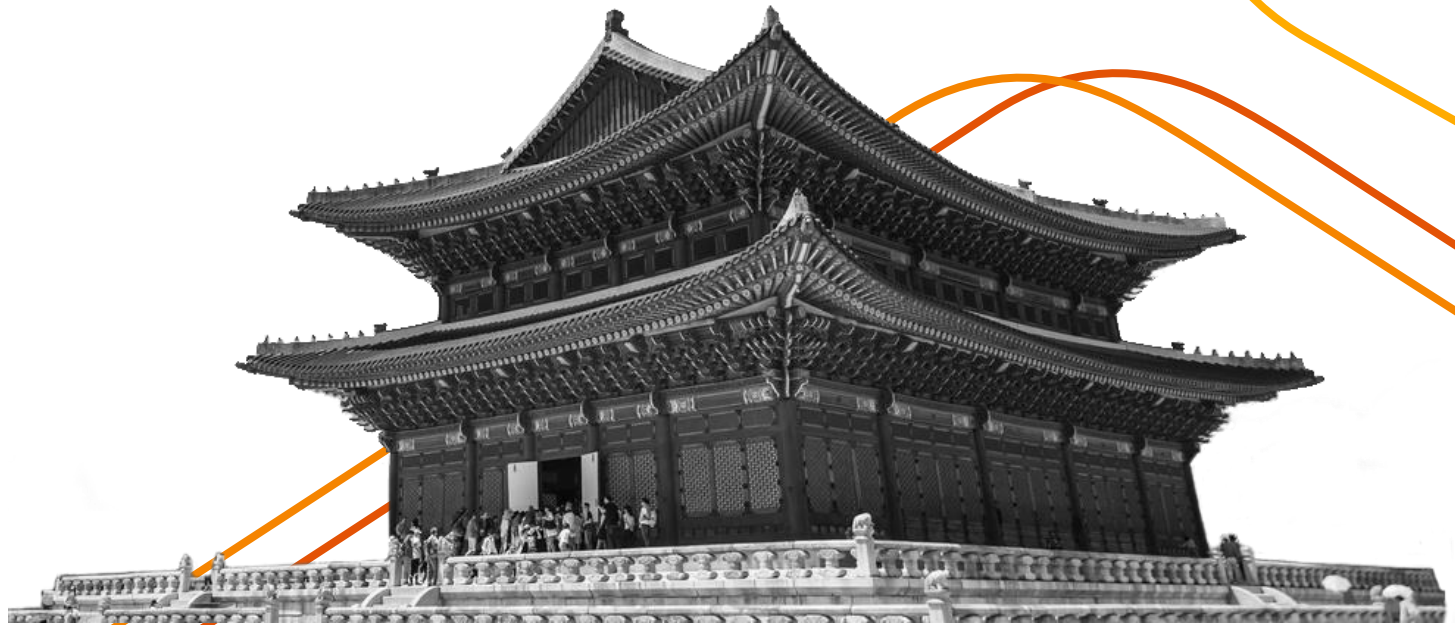
Films, animations,
broadcasting and digital
format productions



Korea has co-
production agreement
with France, New
Zealand, EU, Australia,
China, and India



HOW CAN AUSTRALIA HELP SEOUL?



AUSTRADE SEOUL SERVICES AND EXPERTISE

Market trends and statistics,
identify market barriers and
regulations and assess
market potential



Provide information about
**Korean commercial
practices and requirements**



Identify business partners,
new customers and
opportunities through our
business networks



Visits to Korea:

Tailored meeting programs
and visit program support
providing cultural, business
and language guidance



**Exhibitions
and conferences**



**Targeted
trade missions**

SCREEN INDUSTRY SNAPSHOT AND CO-PRODUCTION OPPORTUNITIES

MR JONATHAN HYONG-JOON KIM

CHIEF CREATIVE OFFICER

SIGNAL PICTURES



Screen Industry Snapshot Korea

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SCREEN INDUSTRY SNAPSHOT AND CO-PRODUCTION OPPORTUNITIES

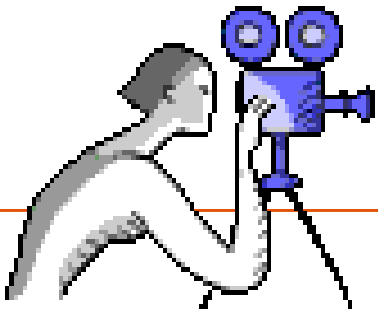
MR JONATHAN HYONG-JOON KIM

CHIEF CREATIVE OFFICER

SIGNAL PICTURES



SCREEN INDUSTRY SNAPSHOT - KOREA



BRIEF HISTORY OF KOREAN SCREEN INDUSTRY

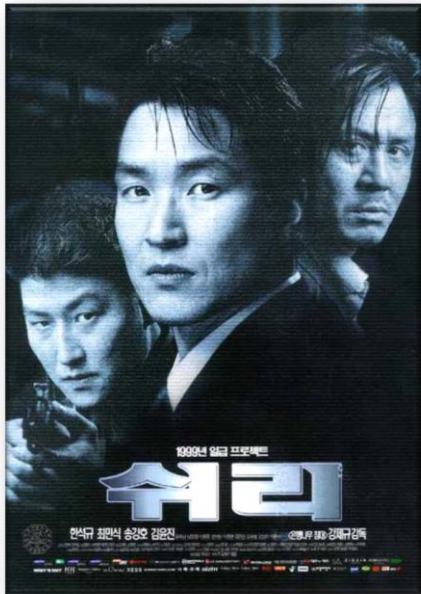
- › The “Motion Picture Law” was enacted in January 1962 and revised nine times, until it became the “Film Promotion Law” in July 1996.
- › Import Quota for Foreign films (1959~1986)
- › 1985 - more than 2/5 of screening days each year and reciprocal screening of Korean and foreign films in cities of more than 300,000 of population
- › 1999 MPPC changes to Korean Film Council.



- › Screen quota reduced from 146 days to 73 days, as part of Korea US FTA signed in 2006



- › New waves - Political climate change, Abolition of censorship, Free overseas travel
- › 1999 - Powerful “Chaebol” conglomerates investment in films



Box Office

6.8 million Admissions

Titanic 4.5 million

COREOLEUCISCUS SPLENDIDUS



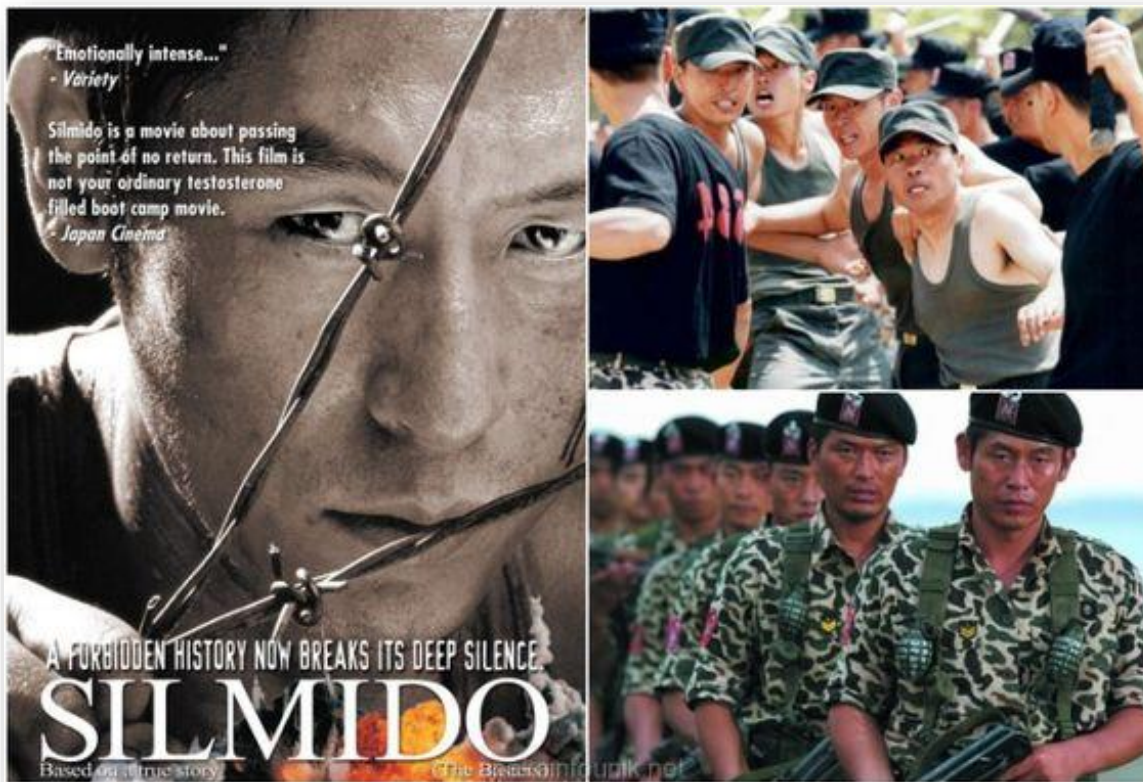
Coreoleuciscus splendidus, also known as the Swiri or Korean splendid dace, is a species of fish from the cyprinid family endemic to rivers of the Korean peninsula

The Fish That Sank the Titanic



BRIEF HISTORY OF KOREAN SCREEN INDUSTRY – CONT'D

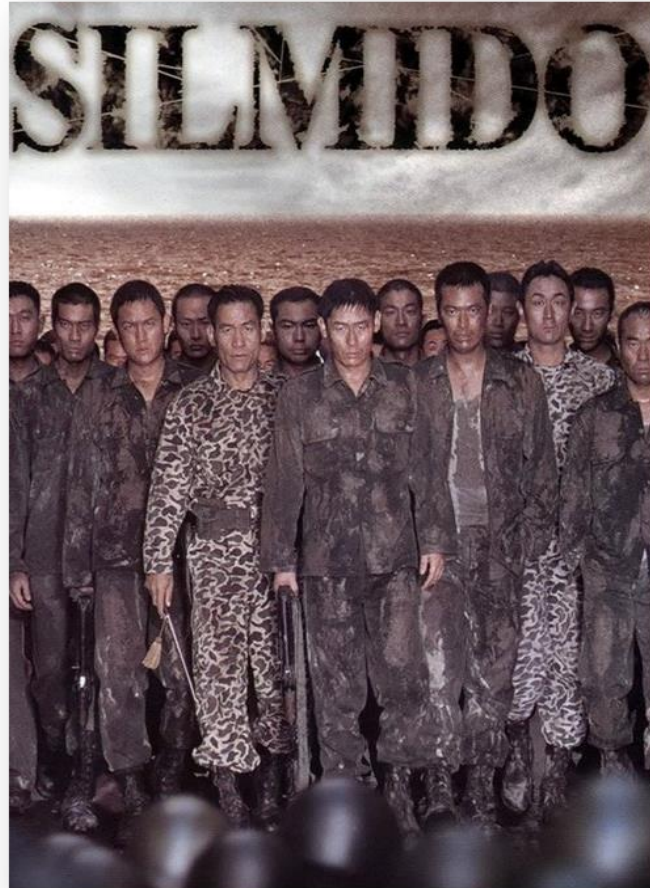
- › Dream of 10 million admissions came true in 2003 (Korean population in 2003 was 48 mil)



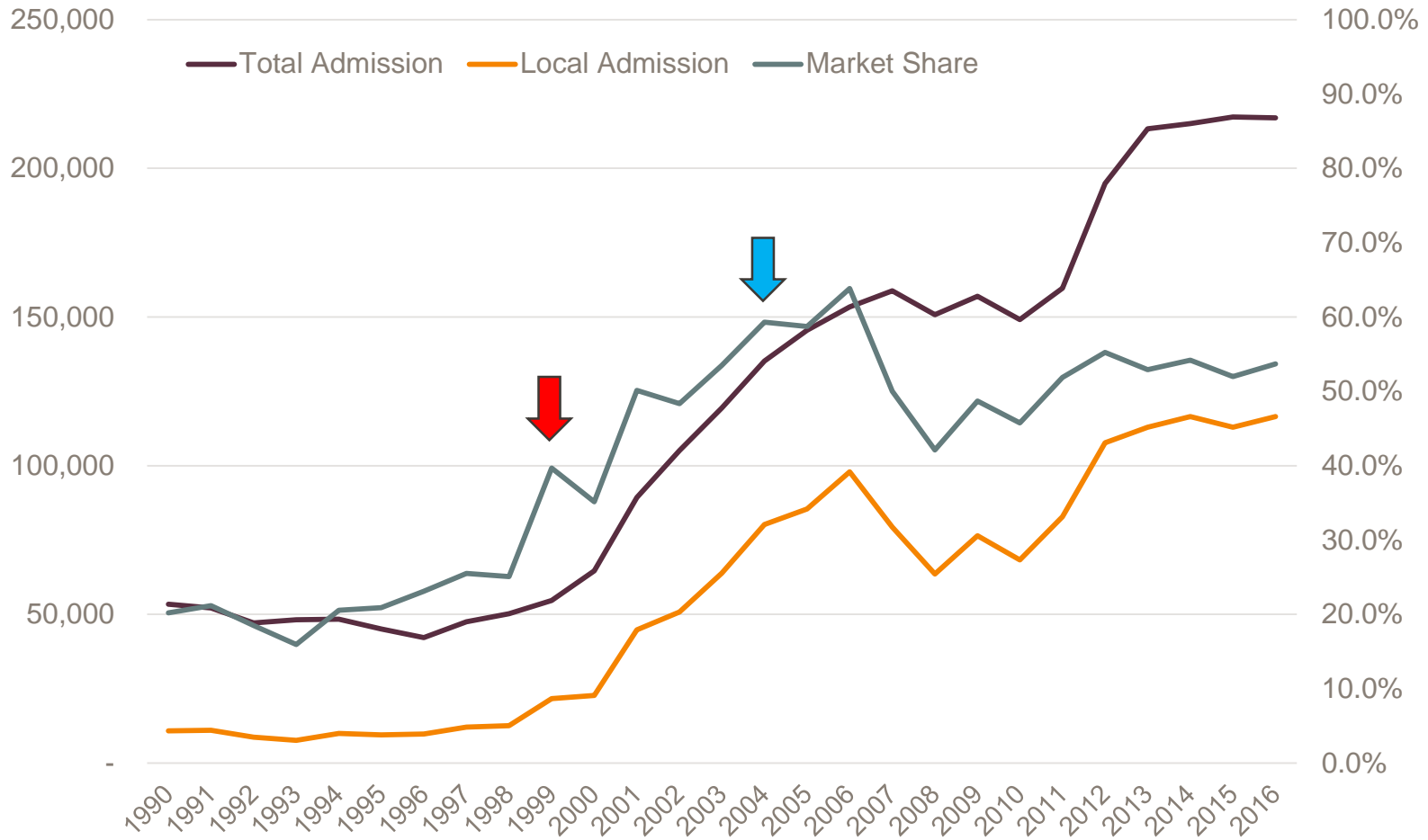
SILMIDO' - A HISTORICAL MARK IN THE KOREAN BOX OFFICE

- ‘About **1 out of every 5 Koreans has seen the domestic action film “Silmido”** since it opened on Christmas Eve. As of noon yesterday, more than 10 million tickets for the movie had been sold, setting a record, said Cinema Service, the movie’s distributor. Before “Silmido” opened, reaching the 10-million-viewer level was only a dream in the local film industry, since Korea’s population is less than 50 million. Previously, the most commercially successful Korean film was “Chingu” (Friends), released in 2001, for which 7 million tickets have been sold. (Quotes from JoongAng Daily on 19 Feb 2004)
- › Total Admissions: **11.08 million**
- › Total Box office: \$70 million

AFTER 'SILMIDO' AND 'TAEGUKGI' –POST 2004



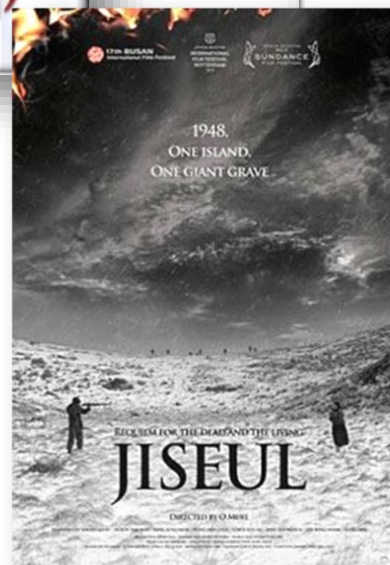
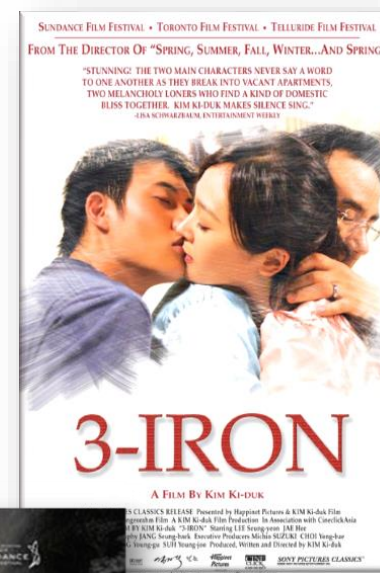
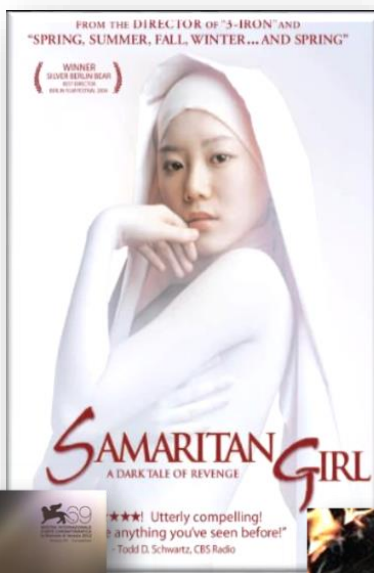
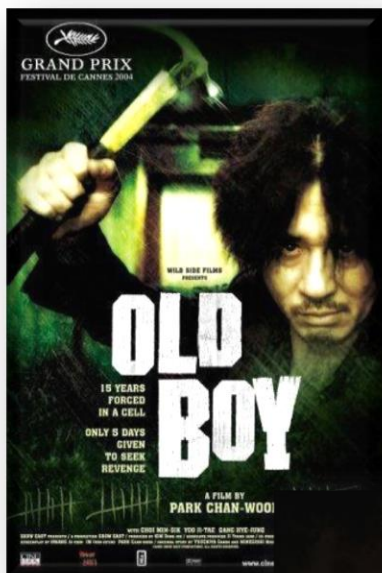
KOREAN FILM MARKET SHARE AND ADMISSION POST 2004



KOREAN AWARD-WINNING FILMS IN THE MAJOR FILM FESTIVALS

- › **Old Boy:** Directed by PARK Chan-wook, Grand Prix Award, Cannes 2004
- › **Samaritan Girl:** Directed by KIM Ki-duk, Best Director Award, Berlin 2004
- › **3 Iron:** Directed by KIM Ki-duk, Best Director Award, Venice 2004
- › **Secret Sunshine:** JEON Do-yeon won the Best Actress Award, Cannes 2007
- › **Thirst:** Directed by PARK Chan-wook, Jury Prize, Cannes 2009
- › **Poetry:** Directed by LEE Chang-dong, Best Screen Play Award, Cannes 2010
- › **Pieta:** Directed by KIM Ki-duk, Golden Lion Award, Venice 2012
- › **Circleline:** Directed by SHIN Su-won, Canal plus Award, Cannes 2012
- › **Hosanna:** Directed by NA Young-kil, Golden Bear Award: Short Film, Berlin 2015
- › **Factory Complex:** Directed by IM Geung-soon, Silver Lion, Venice 2015
- › **Right Now, Wrong Then:** Directed by HONG Sang-soo, Golden Leopard, Locarno 2015

KOREAN AWARD-WINNING FILMS IN THE MAJOR FILM FESTIVALS



TOP 10 BOX OFFICE FILMS 2016 - KOREA

Rank	Title	Country	Gross(USD)	Admission
1	Train to Busan	Korea	\$80,326,106	11,565,827
2	A Violent Prosecutor	Korea	\$66,654,694	9,707,581
3	Captain America: Civil War	USA	\$62,648,372	8,677,249
4	The Age of Shadows	Korea	\$52,818,779	7,500,420
5	Tunnel	Korea	\$49,594,383	7,120,508
6	Operation Chromite	Korea	\$47,501,216	7,049,643
7	LUCK-KEY	Korea	\$48,659,018	6,975,290
8	THE WAILING	Korea	\$48,158,207	6,879,908
9	The Last Princess	Korea	\$38,270,541	5,599,229
10	Doctor strange	USA	\$40,932,612	5,446,239

TOP 10 BOX OFFICE FILMS 2016 - AUSTRALIA

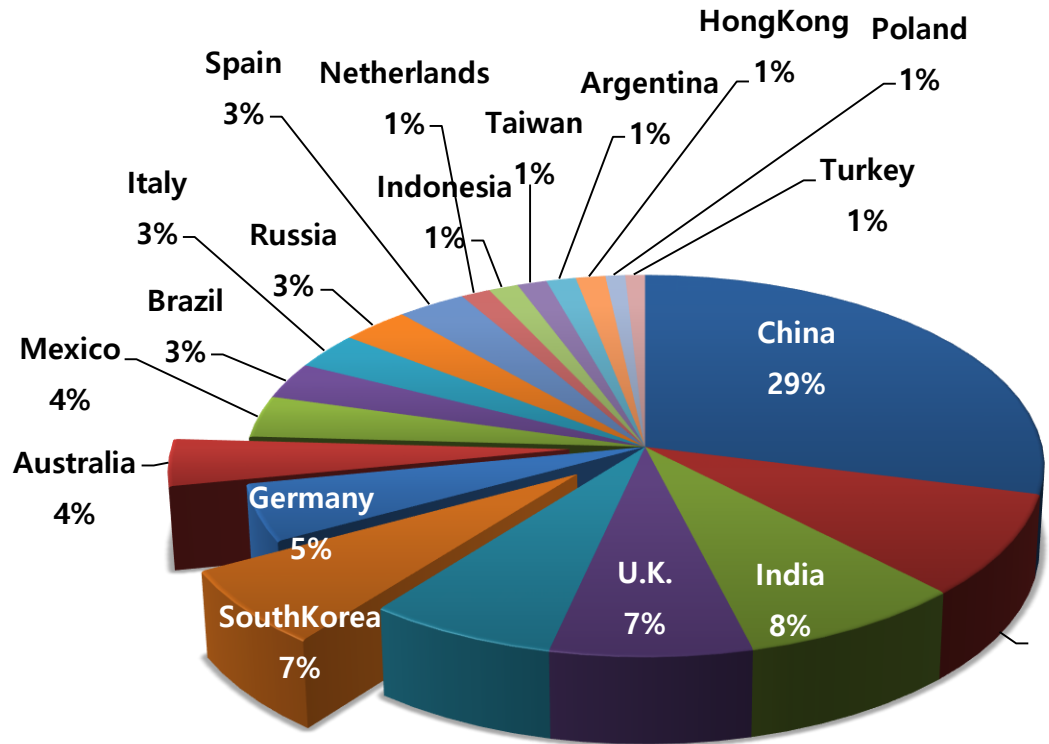
Rank	Movie Title	Distributor	Gross	Release
1	Rogue One: A Star Wars Story	Disney	\$37,481,197	12/15
2	Finding Dory	Disney	\$36,312,640	6/16
3	Deadpool	Fox	\$33,314,499	2/10
4	Suicide Squad	WB	\$26,126,519	8/4
5	Captain America: Civil War	Disney	\$25,200,229	4/28
6	Fantastic Beasts and Where To Find Them	WB	\$24,200,000	11/17
7	The Jungle Book (2016)	Disney	\$22,694,801	4/7
8	Batman v Superman: Dawn of Justice	WB	\$22,517,365	3/24
9	The Secret Life of Pets	UPI	\$22,428,963	9/8
10	Zootopia	Disney	\$21,369,695	3/17

TOP 20 BOX OFFICE FILMS 2003-2016 - KOREA

Rank	English Title	Nationality	Box Office (Korean Won in Million)	Admissions	Year
1	The Admiral: Roaring Currents	Korea	135,754	17,615,152	2014
2	Ode to My Father	Korea	110,934	14,262,198	2014
3	Veteran	Korea	105,169	13,414,200	2015
4	Avatar	USA	124,897	13,302,637	2009
5	The Host	Korea	91,138	13,019,740	2006
6	The Thieves	Korea	93,667	12,983,841	2012
7	Miracle in Cell No. 7	Korea	91,433	12,811,435	2013
8	Assassination	Korea	98,466	12,706,483	2015
9	Masquerade	Korea	88,909	12,323,595	2012
10	A Taxi Driver	Korea	95,644	12,157,856	2017
11	Taegukgi	Korea	81,025	11,746,135	2004
12	Train to Busan	Korea	93,180	11,565,827	2016
13	The Attorney	Korea	82,872	11,374,871	2013
14	Haeundae	Korea	81,025	11,324,545	2009
15	King and the Clown	Korea	86,119	12,302,813	2005
16	Silmido	Korea	77,518	11,074,000	2003
17	Avengers: the age of Ultron	USA	88,582	10,494,499	2015
18	Interstellar	USA	82,619	10,305,015	2014
19	Frozen	USA	82,461	10,296,101	2014
20	A Violent Prosecutor	Korea	77,320	9,707,581	2016

TOP 20 INTERNATIONAL BOX OFFICE MARKETS

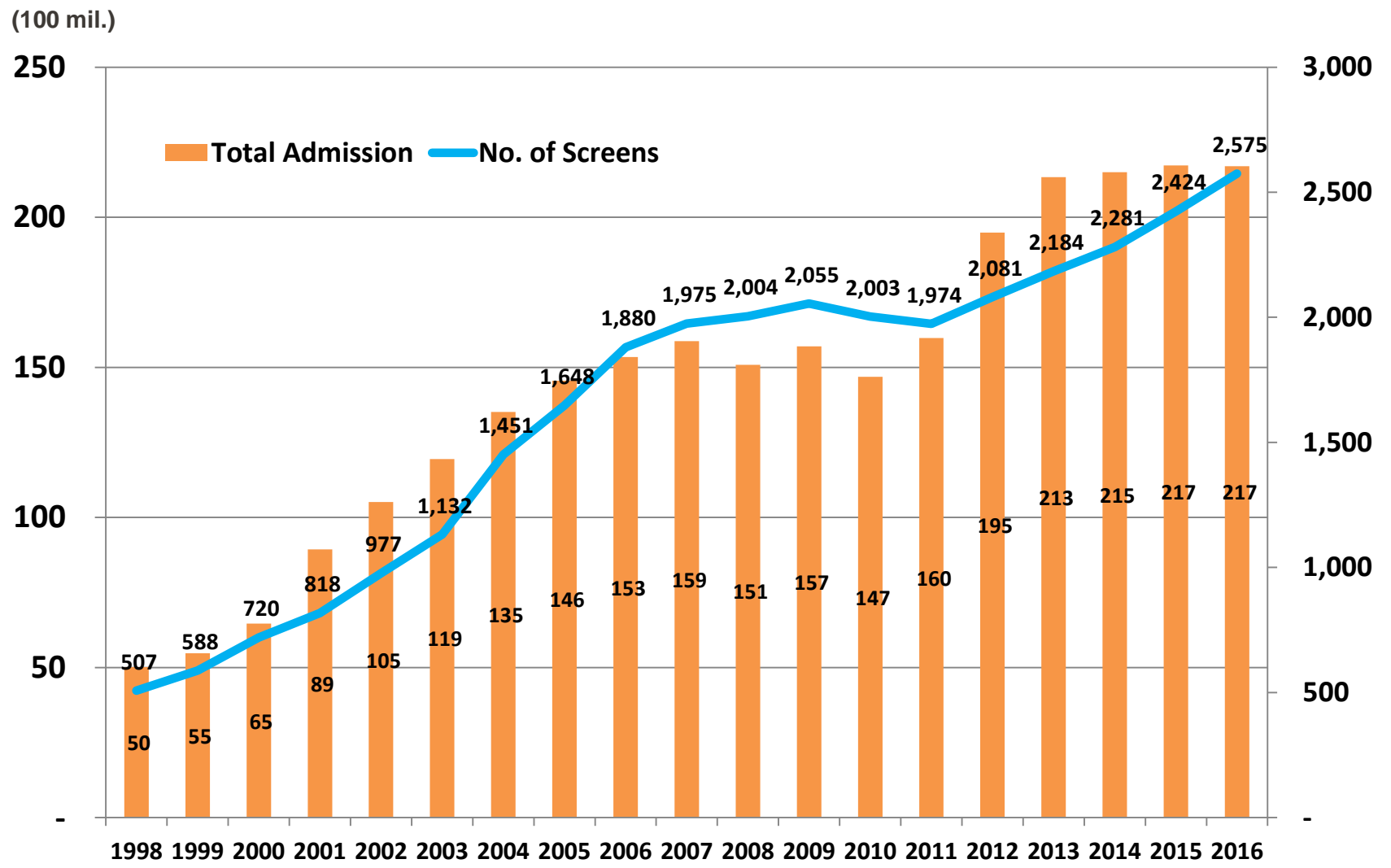
US\$ bil		
1	China	\$6.60
2	Japan	\$2.00
3	India	\$1.90
4	U.K.	\$1.70
5	France	\$1.60
6	South Korea	\$1.50
7	Germany	\$1.10
8	Australia	\$0.90
9	Mexico	\$0.80
10	Brazil	\$0.70
11	Italy	\$0.70
12	Russia	\$0.70
13	Spain	\$0.70
14	Netherlands	\$0.30
15	Indonesia	\$0.30
16	Taiwan	\$0.30
17	Argentina	\$0.30
18	HongKong	\$0.30
19	Poland	\$0.20
20	Turkey	\$0.20



KOREA FILM INDUSTRY MARKET TREND 2004 - 2016

Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total Admission (10,000)	13,517	14,552	15,341	15,877	15,083	15,696	14,918	15,972	19,489	21,335	21,506	21,729	21,702
Variation Rate (%)	13.1	7.7	5.4	3.5	-5	4.1	-5.8	7	21.9	9.5	0.8	1.0	-0.1
Korean Film Market Share (%)	59.3	58.7	63.8	50	42.1	48.7	46.6	51.9	58.8	59.7	50.1	52.0	53.7
Total Box Office (million USD)	773	816	842	902	890	995	1,062	1,123	1,323	1,410	1,513	1,559	1,585
Box Office Variation Rate(%)	18.5	5.7	3.1	7.2	-1.3	11.7	5.7	5.7	17.7	4.2	7.3	3.1	1.6
Total No. of Screens	1,451	1,648	1,880	1,975	2,004	2,055	2,003	1,974	2,081	2,184	2,281	2,424	2,575
Movies per Capita	2.78	2.98	3.13	3.22	3.03	3.15	2.92	3.15	3.83	4.17	4.19	4.22	4.20

TOTAL ADMISSION VS NUMBER OF SCREENS



MARKET SHARE BY COUNTRY OF ORIGIN 2016

Country	No. of Titles	Total Box Office (millions USD)	Box Office Share	Total Admission	Admission Share	
Korea	374	843.50	53.2%	116,552,899	53.7%	
USA	USA Major	68	526.03	33.2%	70,460,227	32.5%
	USA Indie	301	142.41	9.0%	19,350,168	8.9%
	Sub Total	369	668.45	42.2%	89,810,395	41.4%
Greater China	65	6.38	0.4%	909,236	0.4%	
Europe	221	28.28	1.8%	4,019,102	1.9%	
Japan	570	22.57	1.4%	3,246,588	1.5%	
Misc.	66	15.55	1.0%	2,486,135	1.1%	
Total	1,665	1,584.71	100%	217,024,355	100%	

TOTAL MARKET SHARE BY DISTRIBUTORS 2016

Rank	Distributor	No. of Releases	Sales Revenue (US\$ mil)	Market share (%)
1	CJ E&M Corp	24	268.7	17.0
2	Showbox Corp	10	213.5	13.5
3	The Walt Disney Company Korea Ltd	10	199.5	12.6
4	Warner Bros Korea	13	166.4	10.5
5	20 th Century Fox Korea	14	153.4	9.7
6	NEW (New Entertainment World)	19.5	145.8	9.2
7	Lotte Shopping Lotte Entertainment	21	119.6	7.5
8	Universal Pictures International Korea	35	108.5	6.8
9	Megabox Inc. Plus M	12	44.9	2.8
10	WAW Pictures	1	24.7	1.6
	Others	1,505.5	139.3	8.8
	Total	1,665.0	1,584.7	100.00

AVERAGE KOREA FILM BUDGET BY YEAR 1997 - 2016

(US\$ mil.)

	Production Cost	%	P & A	%	Total	No. of Titles
1997	1.00	84.6%	1.82	15.4%	2.82	60
1998	1.09	80.0%	2.73	20.0%	3.82	43
1999	1.27	73.6%	4.55	26.4%	5.82	42
2000	1.36	69.7%	5.91	30.3%	7.27	62
2001	1.47	63.5%	8.45	36.5%	9.93	52
2002	2.23	65.9%	11.55	34.1%	13.77	82
2003	2.58	68.3%	12.00	31.7%	14.58	65
2004	2.55	67.3%	12.36	32.7%	14.91	74
2005	2.48	68.4%	11.45	31.6%	13.94	83
2006	2.35	64.2%	13.09	35.8%	15.44	108
2007	2.32	68.5%	10.64	31.5%	12.95	112
2008	1.88	68.8%	8.55	31.2%	10.43	108
2009	1.42	67.5%	6.82	32.5%	8.24	118
2010	1.20	65.7%	6.82	34.3%	8.02	140
2011	1.41	68.3%	6.55	31.7%	7.95	150
2012	1.22	66.0%	6.27	34.0%	7.49	175
2013	1.36	70.1%	5.82	29.9%	7.18	182
2014	1.35	74.1%	4.73	25.9%	6.08	217
2015	1.32	72.9%	4.91	27.1%	6.23	232
2016	1.56	71.3%	6.27	28.8%	7.84	178

NUMBER OF TITLES BY BUDGET RANGE

(US\$ mil)

Budget Range	0~1	1~2	2~3	3~4	4~5	5~6	6~7	7~8	8~9	9~10	10~	Total
No. of Titles	112	18	5	2	7	5	5	4	2	4	14	178
%	62.9%	10.1%	2.8%	1.1%	3.9%	2.8%	2.8%	2.3%	1.1%	2.3%	7.9%	100%

ROI OF KOREAN FILMS 2004 - 2016

(KRW mil)

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total Revenue	285,462	336,786	388,058	266,927	200,839	245,821	263,449	293,916	438,458	501,783	424,385	454,884	405,943
Total Cost	276,958	312,117	513,640	448,813	355,667	282,945	296,001	344,700	386,873	439,622	398,384	439,945	(373,028)
Total Profit	8,504	24,669	-125,582	-181,886	-154,827	-37,123	-32,552	-50,784	51,585	62,161	26,001	14,939	48,731
Return on Investment	3.1%*	7.9%	-24.5%	-40.5%	-43.5%	13.1%	11.0%	14.7%	13.3%	14.1%	6.5%	3.4%	8.8%

* Core commercial film (300 screens and above) ROI in 2016 – 13.8%

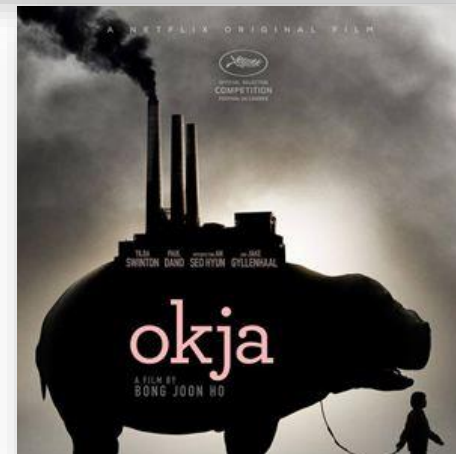
KOREAN FILM EXPORT – TOTAL & BREAKDOWN

(US\$)

	2012	2013	2014	2015	2016
Completed	20,174,950	37,071,445	26,380,475	29,374,098	43,893,537
Service	17,273,854	22,388,411	36,703,952	26,126,402	57,196,603
Total Export	<i>37,448,804</i>	<i>59,459,856</i>	<i>63,084,427</i>	<i>55,500,500</i>	<i>101,090,140</i>
Variation Rate	7.4%	58.8%	6.1%	-12.0%	82.1%

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KOREAN DIRECTORS IN HOLLYWOOD



AUSTRALIAN FILMS AT THE BUSAN INTERNATIONAL FILM FESTIVAL

- **Paper Planes:** Directed by Robert Connolly, 2014
- **The Mule:** Directed by Angus Sampson, Tony Mahony, 2014
- **Wurmwood:** Directed by Angus Sampson, Tony Mahony, 2014
- **The Daughter:** Directed by Simon Stone, Tony Mahony, 2015
- **The Dressmaker:** Directed by Jocelyn Moorhouse, 2015
- **Backtrack:** Directed by Michael Petroni, 2015
- **Last Cab to Darwin:** Directed by Jeremy Sims, 2015
- **Boys in the trees:** Directed by Nicholas Verso, 2016
- **Hounds of Love:** Directed by Ben Young, 2016
- **Bad Girl:** Directed by Fin Edquist, 2016

KOREAN FILMS AT AUSTRALIAN FILM FESTIVALS

- **OKJA** (Shown at the 2017 Sydney Film Festival)
- **DONGJU: THE PORTRAIT OF A POET** (Shown at the 2016 Australian Korean Film Festival)
- **LIKE FOR LIKES** (Shown at the 2016 Australian Korean Film Festival)
- **FARMING BOYS** (Documentary where plot includes one year working holiday in Australia)
- **A SINGLE RIDER** (Location in Australia, Warner Bros Korea, Perfect Storm Film, Curious Film)

KOREA FILM FESTIVAL IN AUSTRALIA (KOFFIA)



LOCATION INCENTIVES

- Feature films, television series and documentaries produced by a foreign production company, in which the allocation of foreign capital in the production cost exceeds 80%. Eligible works must satisfy the following requirements
- 20~25% Cash Rebate on eligible cost
 - 25% : Shoot no less than 10 days and spend no less than 2 billion KRW (approx. 2 million USD) in Korea
 - 20% : Shoot no less than 3 days and spend 100 million ~2 billion KRW (approx. 100K~2million USD) in Korea
- Must receive approval from the Review Committee who will evaluate the following three elements
 - (1) the degree to which the work promotes tourism ("tourism expansion")
 - (2) the degree to which the work contributes to the Korean film industry ("quantitative contribution")
 - (3) the extent to which the foreign producer participates in the production of the work ("foreign engagement")

AUSTRALIA KOREA CO-PRODUCTION OPPORTUNITIES

FINDING APPEALING SUBJECTS TO BOTH COUNTRIES WHICH ARE BOTH GENUINE AND NATURAL TO BOTH COUNTRIES.

For Example:



Over 17,000 **Australians** served during the **Korean War**, of which 340 were killed and over 1,216 wounded. A further 29 had become prisoners of **war**.

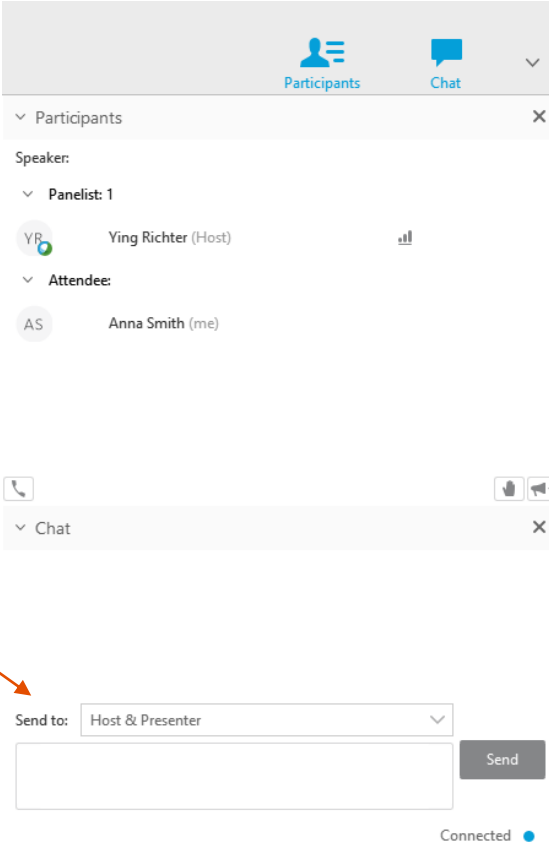
HOW TO ASK QUESTIONS

1. Select "Chat" function

2. Select "Host & Presenter"

3. Type your question here

3. Press 'Send'



The image shows a Zoom chat interface with four instructional steps and arrows pointing to specific elements:

- Step 1:** An arrow points from the text "1. Select 'Chat' function" to the "Chat" button in the top right corner of the Zoom window.
- Step 2:** An arrow points from the text "2. Select 'Host & Presenter'" to the "Host & Presenter" option in the "Send to:" dropdown menu.
- Step 3:** An arrow points from the text "3. Type your question here" to the text input field below the dropdown menu.
- Step 4:** An arrow points from the text "3. Press 'Send'" to the "Send" button on the right side of the input field.

The interface includes a "Participants" list with "Ying Richter (Host)" and "Anna Smith (me)", a "Chat" input area, and a "Send" button. A "Connected" status indicator is visible at the bottom right.

WE LOOK FORWARD TO WORKING WITH AUSTRALIA!

