

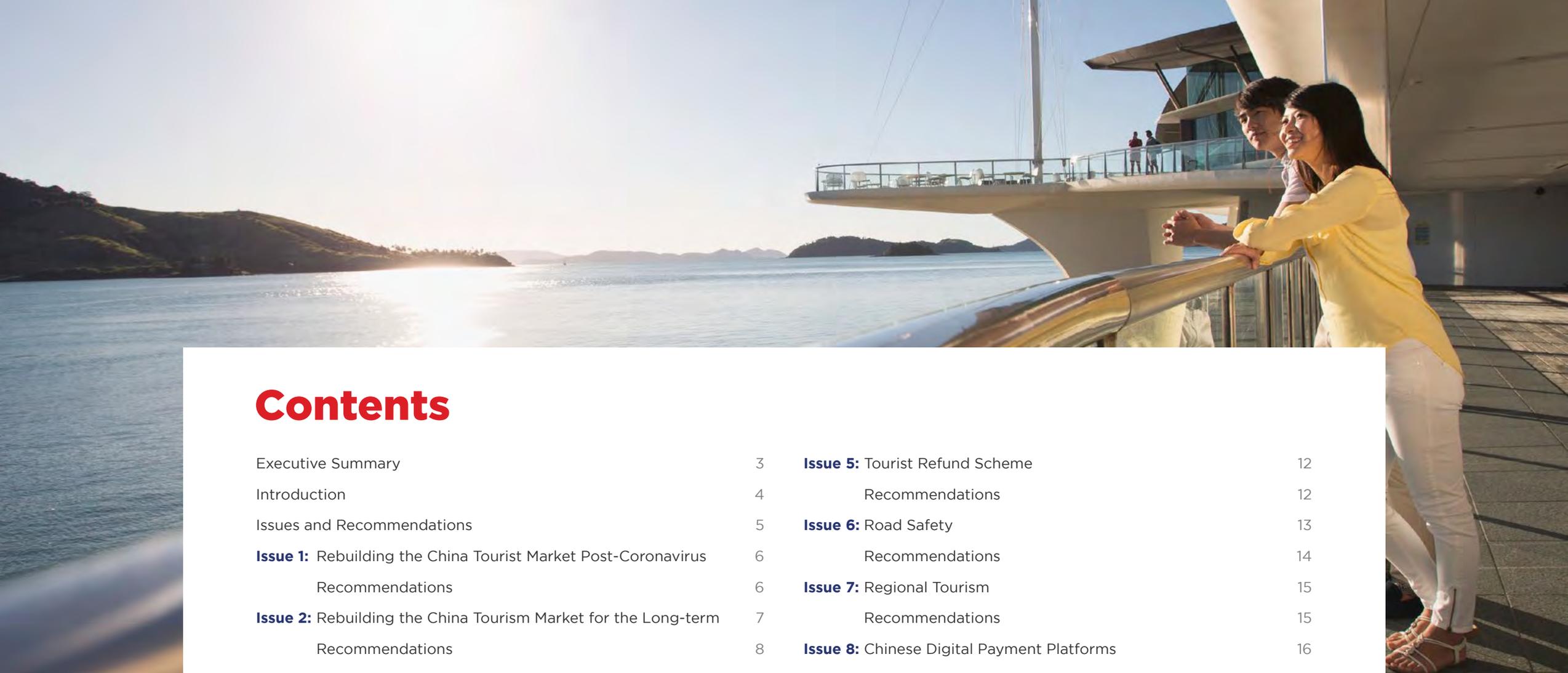


Inbound Tourism from China

Supporting recovery
and future growth



Australia China Business Council
澳大利亚中国工商业委员会



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Executive Summary



Chinese travellers are Australia's largest tourist cohort, with expenditure three times that of the next most lucrative market.

ACBC is confident Chinese tourists will return to Australia following the twin crises of Coronavirus and the east coast bushfires. However, a full recovery will take time. Government-led strategies will be needed if we are to remain on track to achieve Chinese tourism growth in the order of Tourism Australia's earlier forecasts.

When the government considers removing the current travel restrictions, it will rightly be guided by public health considerations. We recommend it examines an **easing of travel restrictions on a country-by-country basis**, as Coronavirus is brought under control. **China should be an early candidate for easing of restrictions** if it consolidates its success in controlling its outbreak.

To return Chinese inbound tourism to a path of strong growth, we recommend the government **develop and coordinate a comprehensive marketing and promotion strategy across China**. A promotional campaign around a **Chinese festival could celebrate the reopening of Australia to Chinese tourism** and have high impact in China.

As soon as the environment allows, **the Minister for Trade, Tourism and Investment should conduct a bilateral visit to China, accompanied by a delegation of tourism industry representatives**. This would demonstrate our strong commitment to the Australia-China relationship and to strengthening bilateral tourism and other business links.

The Coronavirus and bushfire crises might exacerbate the tourism sector's shortage of

talent with Chinese language and cultural skills. We recommend an **internship or exchange program in the tourism and hospitality sector**, along the lines of the New Colombo Plan.

The Tourist Refund Scheme, which has enormous appeal with Chinese consumers, should be made more accessible in order to boost tourist spending and eliminate any confusion created by the complexity of the current system.

With countries around the world expected to compete for the return of Chinese tourists, the Government should consider **ways to reduce visa application processing times**, particularly during periods of peak demand. As a good will gesture, it should reissue visas at no cost to former visa holders that were prevented from travelling due to Coronavirus.

Accidents involving the growing number of Chinese self-drive tourists risk damaging Australia's reputation as a safe travel destination and undermining local community support for Chinese tourism. We recommend **providing Chinese-language alerts of "danger hotspots" via apps and an online driver education course for self-drive tourists**.

Chinese tourism could boost regional economies, including those affected by recent bushfires. However, understanding in regional areas of how to promote to Chinese consumers and cater to their needs remains at a low level. **Developing a library of resources for regional councils and businesses, along with assistance with social media campaigns and face-to-face Chinese cultural education workshops** could support further growth.

Finally, as China becomes an increasingly cashless society, more widespread acceptance of Chinese payment systems will increase spending by Chinese tourists. **To support greater uptake among tourism businesses, the government could make available regularly updated information on Chinese e-payment platforms**.

Introduction

Tourism sector members of the Australia China Business Council have prepared this report as a contribution to work by government and industry to identify ways to ensure the recovery and future growth of the tourism industry post-Coronavirus.

This submission's scope is confined to Chinese tourism to Australia, in line with our focus as a bilateral business council. It draws on the experience and expertise of member companies that span hotel groups, airlines and other large businesses as well as smaller operators and industry consultants.

In 2018, China overtook New Zealand as our largest source of foreign visitors. This lead was maintained in 2019 with 1.4 million Chinese visits to Australia. Chinese visitors spent \$12.4 billion in the economy, dwarfing the \$3.9 billion spent by US tourists, the next most lucrative group for the local tourism industry.

Coronavirus and the east coast bushfires of the 2019-20 summer have devastated the industry, with impacts that will last well after these crises end. Industry representatives estimate that it will take two-to-three years from the end of the health crisis to rebuild the Australian tourism industry to 2019 levels.

ACBC remains confident the tourism industry will recover and Chinese tourists will return to our shores. However, in our view government-led strategies will be needed to put Chinese tourism back on track to achieve previously projected growth, such as Tourism Australia's forecast of 3.9 million visitors by 2027.

ACBC welcomes the commitment by the Commonwealth, as well as state and territory governments, to supporting the tourism industry through the Coronavirus crisis. Particularly welcome is the clearly stated commitment of the Minister for Trade, Tourism and Investment to work with the industry through this time to ensure that

once this crisis is over, visitors will again flow and the industry rebound. Financial measures such as cash payments and the JobKeeper scheme will help ensure tourism businesses can recommence operations when international tourism reopens. Tourism businesses will also benefit from the additional \$50 million injected into the Export Market Development Grants (EMDG) program.

This China-specific submission proposes additional measures that address the unique challenges presented by our largest and most important tourism market. It covers issues that relate to early stages in recovery of the industry, as well as issues that will support long-term growth in the sector. It is our hope that Chinese tourism returns to its earlier growth path and that a growing number of Australian tourism businesses are able to capture the opportunities this will bring.



ACBC remains confident the tourism industry will recover and Chinese tourists will return to our shores.

However, in our view government-led strategies will be needed to put Chinese tourism back on track to achieve previously projected growth.



Issues and Recommendations

ACBC has identified eight priority issues for re-starting Chinese tourism to Australia, setting it on a path to recovery and promoting strong future growth.

For each issue we make a number of recommendations to government. While most of our recommendations fall within the responsibility of the Commonwealth, some fall within the scope of the States and Territories. Unless specified otherwise, the recommendations are intended for action or coordination by the Commonwealth.

Issue 1

Rebuilding the China Tourist Market Post-Coronavirus

The government will rightly be guided by public health requirements in future decisions about loosening travel restrictions imposed to control Coronavirus. Countries and regions that have achieved success in controlling Coronavirus and have robust systems for monitoring and managing secondary outbreaks should be considered for priority easing of travel restrictions, given the lower risk of transmission. This should be done on a country-by-country or region-by-region basis.

In light of China's success in controlling its Coronavirus outbreak, it should be considered as a candidate for early lifting of travel restrictions. Other markets appear to be adopting such an approach.

To further reduce any risk of transmission of the disease into Australia, additional conditions could be applied to travellers from countries where travel restrictions are eased. Such conditions could include restrictions on the groups permitted to travel or quarantine measures taken at the border.

Public support for Chinese tourism is likely to have been affected by the Coronavirus outbreak. Some sections of the Australian community blame China for the pandemic, despite evidence that most infections in Australia originated from cruise ship passengers and travellers returning home from Europe and the US. The government will have a role to play in rebuilding public confidence in Chinese tourism.



Recommendations

1. **Examine easing travel restrictions as Coronavirus is brought under control in specific countries or regions.** China should be an early candidate for easing of restrictions if it consolidates its success in controlling its outbreak. Risks could be further managed through medical checks and/or quarantine procedures on arrival. An assessment of the China market should be undertaken as a matter of priority, given its success to date in controlling its outbreak.
2. **Undertake a public education campaign to allay community concerns about tourist travellers from China.**



Issue 2

Rebuilding the China Tourism Market for the Long-term

While Chinese tourists will return to Australia once travel restrictions are lifted, it will take some time for Chinese tourism to resume its former growth trajectory. Government-led promotions have the scale and reach needed to rebuild Chinese tourism to previous levels. We recommend the government invest in a tourism marketing campaign across China. The re-opening of Chinese tourism should be highlighted and celebrated through a campaign held around a Chinese festival.

It will be important to engage Chinese tour operators, as well as those operated by Australian Chinese in Australia, in developing the promotional campaign. They are valuable allies, having the best understanding of what would resonate well with their customers. They have a critical role in promoting Australia and are highly motivated to ensure the flow of tourists to Australia returns. Also important will be directly engaging with Chinese social media platforms, which are a powerful promotional vehicle.

In the early stages of the re-opening of Chinese tourism, data on travel trends will be critical to tour operators as they plan to resume operations. The government should disseminate its travel data as soon as possible and, for a limited time, make it free of charge to support industry recovery.

ACBC acknowledges the complexity surrounding bilateral visits by government leaders between Australia and China. When the environment allows, the Minister for Tourism, Trade and Investment should visit China at an early opportunity. Such a visit, accompanied by a tourism industry delegation, would boost efforts to rebuild Australia-China tourism.

A scaled-up familiarisation visit program would support the recovery of Chinese tourism to Australia. It would also be a vehicle for demonstrating to Chinese tour companies the minimal impact of the bushfires on most popular Australian tourism sites.





Recommendations

- 1. Develop and coordinate a comprehensive marketing and promotion strategy across China to attract Chinese tourists back to Australia.** Using existing mechanisms, the Commonwealth, state and territory governments as well as major industry players should coordinate promotional messages to achieve maximum impact.
- 2. Deliver a promotional campaign around a Chinese festival to celebrate the re-opening of Australia to Chinese tourism.** Delivering a welcoming, reassuring message to Chinese tourists would have a particularly strong impact if it coincided with a Chinese festival.

The choice of festival would, of course, depend on the timing of the re-opening. Ideally, Chinese New Year 2021 would be one such option.
- 3. Involve Chinese tour companies in design of this promotional campaign, and engage directly with Chinese social media platforms.**
- 4. Allow the Australian tourism industry access to early, high quality data on the demographics of visitors from China.** One option would be to waive Tourism Research Australia subscription fees for 6-12 months in recognition of the financial hardship experienced by the industry. This would also make this data accessible to smaller operators.
- 5. As soon as the environment allows, the Minister for Trade, Tourism and Investment should conduct a bilateral visit to China, accompanied by a delegation of tourism industry representatives.** The delegation should also offer Australian assistance in rebuilding China's tourism sector, including reciprocal promotion of tourism to each other's markets. This would have the added benefit of assisting Australian industry to understand the post-Coronavirus Chinese tourism landscape and rebuild relationships with remaining players. The delegation should promote investment opportunities in Australia's tourism sector to Chinese investors, particularly in regional areas.
- 6. Increase funding for market familiarisation visits by Chinese tourist agents to Australia.** Should the Minister have the opportunity to visit China, this could be announced during the visit

Issue 3

Cultural Skills Development and Talent Retention

The Australian tourism sector suffers from a lack of talent with adequate language and cultural skills for dealing with Chinese tourists. This is particularly the case if the “tourism sector” is considered in a broad sense to include staff in the retail and food and beverage sectors.

This shortage may become more acute following Coronavirus. A major concern is that, as staff with Chinese language and cultural skills are retrenched, they may not return to the sector. The JobKeeper program has thrown a lifeline to businesses in the tourism sector. However, many may not survive the downturn. For example, the inbound tour operator Aolidays, which operated at Proserpine Airport, booking tours, accommodation and transport for arriving Chinese visitors has gone into administration, removing its Mandarin-speaking staff from the airport.

A workforce with stronger Chinese cultural capabilities would enable Australian businesses to better target their offerings to the China market, cater to the needs of visitors and contribute to an overall higher spend by Chinese tourists in Australia. Feedback from Chinese tourists suggests that existing tourism businesses do not provide the level of customer service that Chinese tourists expect. Small improvements, such as educating tourism staff on how to warmly greet and engage with Chinese customers could make a big difference to overall perceptions of service. An exchange program would deepen cultural skills and build business links in the tourism sector in the medium-term.

Over the longer term, there will be a need for higher levels of Mandarin language capability across the sector. Investment in Mandarin education in schools would underpin successful business engagement with China in tourism and more broadly.





Recommendations

1. **Establish an internship or exchange program to enable Australian hospitality students to work and/or study in China and to enable Chinese hospitality students to work and/or study in Australia as part of their courses of study.** Such a program would be similar to the New Colombo Program scholarships managed by DFAT. An exchange program would have two-way benefits between Australia and China and serve as a positive example of bilateral cooperation.
2. **Support cultural education programs that educate existing business owners and their key frontline managers and staff on engaging with Chinese customers.** This would cover how to warmly engage, welcome and meet/exceed the service expectations of their Chinese guests.
3. **Investigate increasing the 20 hours per week work hour cap for Chinese students that work in tourism businesses.** The increased cap could apply to sections of the tourism industry with greatest need for Chinese cultural skills and where Australians are unable to fill these roles.
4. **Over the longer-term, the federal government should work with state and territory governments to increase Mandarin-language programs in schools to ensure a pipeline of talent for the tourism sector into the future.**



Issue 4

Visa Processing

Competition for Chinese tourists is likely to be fierce once the global health crisis recedes. Australia's information requirements for visa applicants are appropriately comprehensive and in line with those of comparable tourism destinations. However, visa processing times for Chinese seeking to visit Australia can be lengthy, with waiting times spiking during peak periods. Anecdotally, this appears to be a factor in deterring some Chinese tourists from visiting Australia, especially those from second and third tier cities.

Another factor impeding fast visa processing is the number of applications that are rejected because applicants tick the wrong box as they do not understand the question. Bilingual application processes would help avoid this. Investing in improvements to the visa processing system will result in higher levels of visitation and allow Australia to capitalise on any future surges in demand, especially from second and third tier cities.

When travel restrictions are lifted, Australia has the opportunity to reverse the loss in good will from its decision to block entry by tourists and students at the height of the Coronavirus outbreak in Hubei Province. It could do this by replacing visas at no cost for those who were affected. While the decision to impose travel restrictions has ultimately played a critical role in slowing the rate of infection in Australia, the impact on visa holders attracted considerable negative attention in China.



Recommendations

1. **Shorten visa processing times, with the aim of providing decisions within 5 to 7 working days after the application is submitted.** This may involve systems to increase visa processing resources at times of high demand such as Chinese holidays.
2. **Introduce a bilingual visa application system.** This would avoid unnecessary rejections when applicants tick the wrong box through lack of understanding.
3. **All previous visa holders who were denied entry because of the Coronavirus should be offered new visas at no cost.** Such a move would be an important gesture of good faith and good will.





Recommendations

1. **Enable tax refund claims to be submitted at the point-of-sale, or at least at convenient locations in major cities.** This could be made even more efficient by the introduction of an app for travellers to submit claims at point-of-sale.
2. **Revise the requirement for purchase of at least \$300 of goods from a single provider under the TRS.** The only restrictions should be regarding the types of goods bought and that they are purchased from registered Australian businesses.

Issue 5

Tourist Refund Scheme

The Tourist Refund Scheme (TRS) allows visitors to Australia to claim a GST and/or Wine Equalisation Tax (WET) refund for items purchased in Australia that they take on their return flight home. It brings great benefits to the local economy by encouraging greater spending by Chinese tourists in Australia. It has great appeal for Chinese tourists, who are enthusiastic shoppers and love a discount.

The benefits of the scheme could, however, be amplified. Currently, restrictions and complexity in the program make it inconvenient for many visitors. For some Chinese visitors, it even creates a poor last impression and influences decisions about repeat visitation. The TRS could drive greater expenditure and create a more positive experience for Chinese consumers if its current limitations were addressed.

Those claiming refunds under the TRS are required to do so at a designated point in the international terminal at their port of departure from Australia at least 30 minutes before their departure time. This has created long, unwieldy queues inside airport terminals, particularly in Sydney and Melbourne, often to the annoyance of other

passengers. It also causes delays when passengers are late for their flights. Provision of a more efficient means for collecting GST and WET refunds, through automation, privatisation and adding claim centres at locations other than airports (e.g., within major shopping malls), will make it more attractive for Chinese tourists to shop in Australia, bringing wide benefits to the economy. The UK and many EU countries allow point of sale submission of refund claims.

To be eligible, tourists are required to spend at least \$300 with a single supplier (i.e., “a supplier with the same Australian Business Number”). This restricts tourists to purchasing items from large suppliers such as the major department stores and may “bleed” business from smaller outlets. It also requires tourists to check their receipts to ensure all receipts for claim are from “the same Australian Business Number”, which is difficult for some non-English speaking travellers. If the purpose of the TRS is to encourage expenditure by tourists in Australia, there would be greater benefit from allowing them to claim a tax refund on all qualifying goods purchased in Australia.



Issue 6

Road Safety

An emerging issue impacting Chinese tourism into Australia is road safety. A significant number of Chinese undertaking self-drive holidays with cars, campervans and motorcycles are involved in road accidents around the country. The Great Ocean Road has been a particular “blackspot” for Chinese tourists involved in accidents.

Chinese tourists are often unfamiliar with distances, road conditions, safety requirements and driving laws and regulations. Their involvement in accidents in Australia has been harmful to the tourism sector in two ways. First, as accidents and injuries mount, Chinese may come to believe Australian roads and drivers are dangerous and begin to avoid Australia as a destination for self-drive vacations. Secondly, a growing number of people in regional towns impacted by road accidents involving Chinese tourists are becoming less welcoming of Chinese visitors.

We believe measures are needed to prevent further accidents, which bring both personal tragedy and the erosion of Australia’s reputation as a safe place to travel. Some have suggested that overseas drivers should be required to answer a series of questions regarding Australian road rules before being allowed to drive. However, we believe it would be possible to address the issue without having to introduce additional legal requirements. Driver education videos at vehicle hire outlets and use of Chinese social media apps to warn tourists of dangers would go a long way to addressing the problem.



Recommendations

While this matter largely falls under the jurisdiction of the state and territory governments, we believe the federal government should play a role, to ensure a coordinated national response.

- 1. Require Chinese self-drive tourists to undertake an online driver education course before driving in Australia for the first time.** The course could be available at vehicle hire companies at the point of pick up. This does not need to be complex or cumbersome. It could consist of a short video with a number of follow-up questions that drivers could view on their own device or that of the vehicle hire company. It would cover distances, road conditions, safety, and laws and regulations regarding driving in Australia. (We note that driver education courses could be rolled out for other nationalities as well.)
- 2. Road safety messages should be communicated to Chinese visitors via a Chinese-language apps.** These could be delivered via a new app or incorporating them into existing apps that are frequently used by Chinese tourists. Travellers would receive safety reminders as well as warnings when entering accident hotspots. Chinese visitors currently receive messages from the Chinese Embassy and consulates via these platforms when they arrive in Australia. There is an opportunity for the Australian Government to work with the Chinese Government to ensure the safety of their visitors here.



Recommendations

- 1. Develop a library of resources for catering to the needs of Chinese tourists for use by regional councils and businesses.** The library would provide frequently updated guidance and templates for issues such as Chinese culture, signage, and customer service. It would include advice and guidance on how to warmly engage and look after Chinese guests.
- 2. Develop capability among local communities to undertake social media campaigns targeting Chinese consumers.** This could be delivered through demonstration projects between Tourism Australia and local communities or training programs via digital platforms.
- 3. Coordinate work with state and regional tourism marketing agencies to develop multi-day travel itineraries that include visits to key regional areas likely to be of interest to Chinese tourists.** This work could be led by Tourism Australia and should involve Chinese travel agencies or others with contemporary understanding of trends in Chinese tourist preferences.
- 4. Provide grants and marketing support to assist regional areas in creation of events and festivals that would appeal to Chinese visitors.**

Issue 7

Regional Tourism

There is a growing trend amongst Chinese tourists for independent and self-drive travel, which opens the way for visitation to Australia's regional areas. Chinese tourists, like other international visitors, have indicated a desire to spend an average of six nights of a 14-night trip in regional Australia visiting up to four destinations.

The tourism infrastructure needs of regional Australia are well known and being addressed by initiatives at different levels of government. ACBC welcomes the commitment of the government to improving accessibility of regional Australia as a destination for international tourists. Its Regional Tourism Infrastructure Investment Attraction Strategy (2016–2021) aims to increase international investment into tourism infrastructure across regional Australia. Also welcome is the Government's intention to ensure regional tourism will be the centrepiece of the Tourism 2030 Plan.

In addition to physical infrastructure, ACBC sees the need to build 'soft' infrastructure in the regions, such as Chinese cultural capability among regional councils and tourism businesses, signage appropriate to Chinese tourism, and understanding of Chinese consumer needs and preferences. Such infrastructure remains at a very low level in regional Australia, resulting in lost opportunities for value capture. Although a matter for local councils and businesses, the federal government could develop information resources that assist relevant players across Australia.

Some parts of regional Australia have benefited from Chinese social media activity that has driven rapid increases in Chinese tourist visits. Australia's salt lakes and Tasmania's Bridestowe Lavender farm are examples of tourist sites that have attracted high numbers of tourist visitors as a result of spontaneous social media activity. Proactively utilising social media channels for promotion could generate further interest in local attractions.



Recommendations

Make available to tourism businesses regularly updated information on Chinese e-payment platforms and different options for setting up systems to accept them.

With payments technology and trends evolving rapidly, information resources and training materials should be made available and updated regularly. It would be valuable for Tourism Australia to update the 2018 China Payments Opportunity videos and package them into a training video series on how business can set up Chinese e-payment systems. These materials could cover a case study of how Westfield implemented mobile payment solutions for UnionPay, Alipay and WeChat Pay throughout their retail centres, including what it has meant for retailers within Westfield shopping malls.

Issue 8

Chinese Digital Payment Platforms

Chinese visitors often find it frustrating that they cannot use their preferred digital payment platforms, such as Alipay and WeChat, at points-of-sale in Australia. At best this reduces the amount they spend while in country. At worst it might mean they choose other countries to visit that are able to accept these forms of payment.

While federal and state governments as well as industry associations have begun to promote the adoption of popular Chinese payment platforms by vendors, more needs to be done to encourage greater uptake of these systems. Wider adoption of these systems will lead to increased expenditure by Chinese tourists.

Conclusion

Australia is a highly attractive destination for Chinese tourism, offering a range of high quality attractions in a comfortable and safe environment. The disruption to Chinese tourism from the east coast bushfires and Coronavirus will take years to reverse. Building on the strong support the Government has already provided tourism operators during this crisis, further targeted interventions could have a significant impact on the speed and quality of recovery.

Through the recovery and longer-term growth in Chinese tourism, it is our hope that a growing number of Australian tourism businesses will engage with the China tourism market, bringing society-wide benefits.

We commend this report to the consideration of the Australian Government.



Summary of recommendations

Issue	Recommendations
1 Recovery of the China tourism market after the Coronavirus crisis has passed	<ol style="list-style-type: none">1. Examine easing travel restrictions as Coronavirus is brought under control in specific countries or regions. China should be an early candidate for easing of restrictions if it consolidates its success in controlling its outbreak.2. Undertake a public education campaign to allay community concerns about travellers from China.
2 Rebuilding the China tourism market for the long-term.	<ol style="list-style-type: none">1. Develop and implement a comprehensive marketing and promotional strategy aimed at China.2. Deliver a promotional campaign around a Chinese festival to celebrate the re-opening of Australia to Chinese tourism.3. Involve Chinese tour companies in design of this promotional campaign and engage directly with Chinese social media platforms.4. Allow the Australian tourism industry access to early, high quality data on the demographics of visitors from China.5. As soon as the environment allows, the Minister for Trade, Tourism and Investment should conduct a bilateral visit to China, accompanied by a delegation of tourism industry representatives.6. Increase funding for market familiarisation visits by Chinese tourist agents to Australia.
3 Cultural skills development and talent retention	<ol style="list-style-type: none">1. Establish an internship or exchange program that enables young Australians pursuing careers in tourism and hospitality to gain experience in China, similar to the New Colombo Plan.2. Investigate increasing the 20 hour per week work hour cap for Chinese students that work in tourism businesses.3. Increase Mandarin-language programs in schools to ensure a pipeline of talent is available to the industry into the future.
4 Visa processing	<ol style="list-style-type: none">1. Shorten the visa processing time, with the aim of providing decisions within 5 to 7 working days after the visa application is submitted.2. Introduce a bilingual visa application system.3. All previous visa holders who were denied entry because of the Coronavirus should be offered new visas at no cost.

Summary of recommendations

Issue	Recommendations
5 Tourist Refund Scheme (TRS)	<ol style="list-style-type: none">1. Enable tax refund claims to be submitted at the point of sale, or at least at convenient locations in major cities.2. Revise the requirement for purchase of at least \$300 of goods from a single provider
6 Road safety	<ol style="list-style-type: none">1. Require Chinese self-drive tourists to undertake “driver education” courses when collecting vehicles from hire companies.2. Communicate road safety messages to Chinese visitors via Chinese social media platforms and text messages to increase awareness of road conditions and driver safety information.
7 Regional tourism	<ol style="list-style-type: none">1. Develop a library of resources on catering to the needs of Chinese tourists for use by regional councils and businesses.2. Develop capability among local communities to undertake social media campaigns targeting Chinese consumers3. Coordinate work with state and regional tourism marketing agencies to develop multi-day travel itineraries that include visits to key regional areas likely to be of interest to Chinese tourists.4. Provide grants and marketing support to assist regions in creation of events and festivals with appeal to Chinese visitors.
8 Chinese Digital Platform Payments	<ol style="list-style-type: none">1. Work with state governments and industry partners to promote adoption of Chinese e-payment platforms to vendors targeting Chinese tourists.



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Thank you

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