Delivering quality SOUTH AUSTRALIAN EXPERIENCES and Infrastructure for Chinese visitors

Fastrak Asian Solutions

ADELAIDE SOUTH AUSTRALIA

SATC

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A Visitor Economy Assessment and Development Plan for South Australia

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The scope of this project was to:

1. Identify the **current state of the Chinese visitor experience** in South Australia
2. Identify **what is expected by the core Chinese target market** for South Australia
3. Provide a whole of **State blueprint to increase South Australia's ability to cater for the needs and requirements** of the target market
4. **Build capability of all stakeholders involved in the visitor economy** in preparation for increased Chinese visitation

The project delivery outcomes were:

1. A general **Visitor Economy Overview Assessment** including Guidelines
2. **A Development Plan** for South Australian tourism operators
3. Specific **Guidelines for individual products**/ tourism operators

PROJECT BACKGROUND

South Australia (SA), like Australia, has been experiencing rapid growth in Chinese visitors over the last five years – led by mainland China, but also strongly supported by the Singapore, Malaysia and Hong Kong markets.

The South Australian Tourism Commission (SATC) \ its in-market activities and representation, and also through developmental activity here in Australia including:

- Introduction to China Workshops in 2011
- Getting Ready for China and Selling to China Workshops and One-on-One Business Assessments in 2012
- Launch of the Activating China 2020 Strategy in 2013 (which proposed an overall positioning and 6 strategic development focus areas).

As identified several years ago, and now proven very much to be accurate, regional dispersal (or in Asia's case dispersal outside of capital cities) is directly related to access and a market's travel maturity. This also applies to the way in which Chinese visitors travel – from fully inclusive group programs to more flexible and more independent. This is demonstrated across the Chinese markets, with Singapore having the highest dispersal and most independent travellers, while mainland China has the lowest.

With the direct link between access and travel maturity it is no surprise that South Australia has seen smaller China market numbers and growth than in other States like Victoria, NSW and Queensland, and that South Australia is receiving less of the first time visitor / large group business and more of the repeat or VFR visitor / smaller group business from all markets in Asia including China.

For South Australia this is positive, as the Chinese visitors to the state are usually more experienced (or have someone more experienced with them in the case of VFR); want to engage with the product and experiences rather than just look and see; and tend to spend more.

The challenge, however, is that many of the Chinese visitors have this "independent mindset", but don't necessarily have an "independent travel ability", in many cases this is due to lack of overall travel experience.

With limited travel experience, Chinese visitors need more "assistance" than we are used to providing. They ask different questions, they do things differently and they have different requirements to our Western visitors. The Chinese visitor can disrupt normal business processes and practices that can cause both dissatisfaction and additional costs to the business. This impacts not just tourism operators, but also retail businesses, local councils and road traffic agencies – all the touch points that visitors have when travelling through our state.

There is no doubt that Chinese visitor numbers will continue to grow and South Australia is seeking to "Win Its Fair Share", but to do this it needs to address the challenges above to ensure visitor satisfaction and referral is high.

The Activating China 2020 Strategy highlights 6 strategic focus areas, however, the emphasis for this project was on "Delivering Quality South Australian Experiences" and "Delivering Quality South Australian Infrastructure" in order to provide a framework for best practice catering to Chinese visitors, specifically from mainland China, as the numbers grow. Key regions of travel for the Chinese visitor in South Australia are Adelaide, Adelaide Hills, the Barossa, Limestone Coast, Eyre Peninsula, Fleurieu Peninsula and Kangaroo Island.

EXECUTIVE SUMMARY

This report is based on a ten-day visit to South Australia that included workshop sessions and one-on-one meetings involving key visitor economy stakeholders and influencers, Regional Tourism Managers, identified tourism operators and management of the SATC, as well as independent Chinese visitor research.

The visit provided me with a strong understanding of where South Australia's current service and delivery capability sits today (in both destination and product terms), key appeal areas which can be built on, key challenges that need to be addressed and what needs to be done to assist development to maximise the Chinese visitor opportunity.

The overall Assessment of the Visitor Economy (focusing on the visitors' interaction and satisfaction) informs, assists and links with the Development Plan (focusing on tailoring and adjusting service delivery) and vice versa so both are covered in this single report.

There is a lot of commentary about being "China Ready", but I believe there are actually more steps to the process, namely:

China Relevant:	Do you fit the needs and travel patterns of the Chinese visitor?
China Willing:	Is there understanding of the market and its requirements and a desire and capability to adjust / tailor delivery?
China Capable:	Have changes been made to assist the Chinese visitor and how?
China Active:	Are you chasing the business or just receiving it?

This premise was supported in our discussions, and as one of the key influencers stated "There are both the "Technical" and the "Cultural" aspects to be considered." I agree, and believe that "creating the assets without the understanding" will lead to failure.

This also raises another key premise – **that the China market and Chinese visitor business is not for everyone, and, certainly, not for everyone right now.**

So there needs to be a way to assess potential – likely chances of success, relevant levels of investment and identifying key areas that will require development. This can be addressed through the implementation of the Fastrak Asian Solutions "China PACE Assessment Models". The PACE models enable review of destination / product suitability and potential against the four key criteria of **Proximity, Appeal, Capability and Engagement**. The model allows for classification of Destinations into Strong, Medium and Low Potential and of Products into Hero, Support, Potential and Future.
Full details are provided in the Development Plan Report.

The acronym "PACE" is also directly related to the key difference in how Chinese visitors want to engage and interact. They expect to achieve more in far less time than we do in the west, and they don't expect the shortened time span to affect the depth of their engagement. The Chinese visitors want to interact and engage with authentic Australian experiences and they want assistance in "how" they can achieve this.

The assessment, commentary and recommendations in this report are therefore against this background, along with the key premises stated above.

Both my discussions and the research looked at the different touch points for the Chinese consumer: from their arrival, through their stay, to their departure. These included arriving, driving, eating & drinking (dining), shopping, staying, and travelling (public transport). Specific details of these touch points are provided later in this report. The research results showed relatively good results for most areas, however, this was against low expectations, and I believe that, while there is a good base to work from, there is still quite a lot of work to be done in order to be competitive with other Australian destinations.

I also reviewed specific products that are currently being used by Chinese visitors, most of whom I believed had the potential to be "Hero" products in their category. These all proved to be relevant, willing, capable and active for Chinese visitors and fit in either the "Hero" or "Support" classifications. However, in nearly all cases improvements in the engagement and capability areas are needed in order to enhance the visitor experience and make it even better!

I focussed on the four key "themes" identified in the SATC Activating China 2020 Strategy: namely **Naturalness, Food, Wine, and Wildlife**, within the key visitation areas of Adelaide, Adelaide Hills, Barossa, Limestone Coast, Eyre Peninsula, and Kangaroo Island. My assessments re-enforced these as the right focus and priorities, although they again highlighted some challenges in the engagement and capability areas.

By necessity, this project has also included a review of the overall positioning and proposition that South Australia offers Chinese visitors – including the overall state proposition of "A great place to work, live and do business – Your Doorway to Australia", the specific tourism messages and positioning being promoted through various social media and advertising channels, as well as the actual available product and service experience.

Discussion feedback and the research indicates that there is a difficulty in "summing up" the different experiences (it felt good but not sure why), so visitors tend to describe a range of features, rather than any key benefit. There is, therefore, more work to do in this area in order to **simplify the tourism proposition and to play to South Australia's strengths of "naturalness", "local", and "easy"**. These issues are further explored in the Development Plan Report.

The consumer research undertaken in conjunction with my visit, included monitoring of social media sites in China (as well as face-to-face surveys with identified "non-group / package" visitors) provided some very positive and interesting results. Overall they reported that Adelaide and South Australia had "surprised" them in a positive way. Having arrived with limited expectations, they left having had those expectations exceeded. However, despite this, other competing Australian destinations were more favoured overall, so these visitors need to be surprised more!

I always advise that "Naturalness" is Australia's key unique selling proposition for Chinese visitors and in South Australia it is the outright hero and cornerstone of appeal. It not only stands alone, but also amplifies and is intertwined in the appeal of all the other elements – eating, drinking, shopping and touring. It is the combination of all these elements, led by naturalness that resonates so strongly with Chinese visitors. This needs to be understood and used to advantage by providers of those elements.

An individual regional destination or precinct's appeal is directly related to the ability to firstly provide these elements and bring "naturalness" to life, and, secondly, to provide them in ways that help the Chinese visitor interact and engage with them. In this area proximity (ease of access and the ability to do "many things in a day") are key factors and this is an identified key attribute for the destinations and "themes" that were reviewed.

Adelaide itself is seen as an easy place to get around ("the 20-minute city" as described by some), due to its small size, square grid lay out and its public transport (tram and free bus routes were particularly noted). Whilst I agree that the scale simplifies accessibility, I found signage to key tourism attractions very limited, and in addition, an extension to the tram network would be beneficial.

Researched visitors did not expect good public transport in areas outside the city and understood they would have to self-drive. Respondents said they found the limited traffic and scenery appealing and the driving "easy". My own experience was similar, however, I strongly believe that there is a lack of signage, both en route to, as well as at, key areas and attractions. This was particularly noticeable in the Barossa. There also needs to be more "assistance" for self-drivers provided overall, and car-hire companies need to be part of remedying this.

It should be noted that a large percentage of the surveyed visitors were groups of family / friends / relatives, and, as such, most had someone in the group who was both more experienced with Australia as well as more English capable. Surprisingly though, 44% of those surveyed were on their first trip to Australia – so a review of the current SATC customer targets will be required.

A good percentage of these visitors were also student related, which highlights the direct interaction between the Education sector and the Tourism sectors within South Australia as well as within the other key Chinese student populations in Sydney, Melbourne, Brisbane, and to a lesser extent Perth.

These trends have been the case throughout Australia in terms of "out of city" and regional growth of Chinese visitors and will continue to grow. But as direct air access opens up later this year (and the number of non-VFR mainland Chinese visitors increases) they will most likely have less experience or knowledge, and will require more assistance and more information. Again, this trend is prevalent across the country and it is a challenge that needs to be addressed.

In addition, the often reported growth in the Chinese Free Independent Travellers (FIT) segment tends to indicate that these visitors are like their western counterparts, and it is important to remember that this is not, in fact, the case. Whilst they may have an independent mindset, this does not necessarily translate into an independent travel ability for most.

In my discussions with South Australian stakeholders it was recognised that the business and trade sectors are also important components and drivers of visitation (as "visitors" rather than "tourists") through general business traffic, Government and industry delegations, incentive travel and the meetings market.

The sister city relationship with Shandong is obviously strong and growing. South Australia's expertise in various sectors (including wine and agri-business) and recent State Government missions, all help to build relationships, improve awareness and appeal overall, and lead to more visitation. It should be noted however that whilst the Shandong area has growth potential it remains a relatively low source of international travellers from China compared to other key cities.

In summary, in many ways Adelaide and South Australia appear to be under-promising and over-delivering, but from a low expectation base, where other competing Australian destinations remain more highly favoured.

In terms of the fundamentals there are a number of positives, namely:

Proximity:	The ease of access – accessibility to a range of relevant attractions and "local" things is a key attribute. (Being small and village like creates comfort and convenience.)
Appeal:	Naturalness and the ability to engage and interact with it (on its own, with food, with wine, and with wildlife) assists in offsetting the "smaller and quieter environment" and "potential to be bored".
Capability:	There are a small group of tourism operators who currently service the visitor well – "Hero" products. There are some highly valued, relatively unique and noted brand product experiences which support the naturalness theme.
Engagement:	The areas mentioned above make engagement easier and suitable to various levels of traveller experience and maturity.

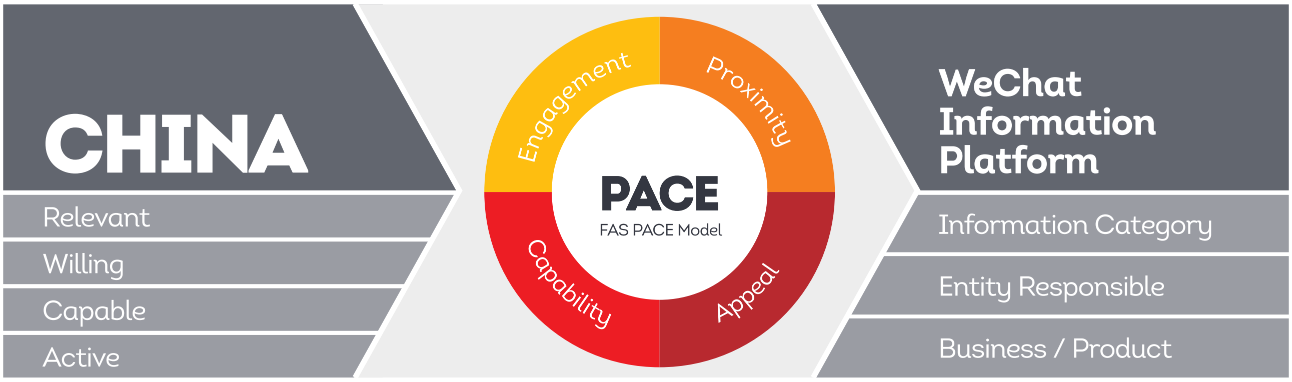
Overall, it is my opinion that Adelaide and South Australia have a good solid base from which to move forward, but, as expected, attention is needed to build understanding in order to build industry capability and engagement. In competitive terms, I believe most other destinations are in a similar position to SA, however their size and scale offer greater challenges. The exception would be Tasmania, which is in a very similar position to SA. So now the time is right for greater focus and action.

In summary, to be successful on delivering and meeting expectations of the Chinese visitor there needs to be:

– **A clear, simple and strong positioning and unique proposition** – the "3 sentence / 3 minute rule"
– Highlighting **"how to enjoy / engage with it"** not of "what you have"
– **More information and assistance** to ensure that the Chinese visitor can interact and engage with the experiences
– **Guidance, assistance and support for individual operators** to make changes and
– **Tailoring and adjustment to service delivery** across the entire visitor economy.

There needs to be a focus on building service capability for today, to build business and cater for tomorrow.

THE OVERALL FRAMEWORK



RECOMMENDATIONS

The following are the top 10 actions required to deliver quality SA Experiences and Infrastructure to the Chinese visitor:

1. Combine the key "themes" of Naturalness, Food, Wine, and Wildlife to create a simple and single minded proposition based on:
"ADELAIDE, SOUTH AUSTRALIA
where you can easily enjoy the good natural things
– (NATURE, FOOD, WINE, AND WILDLIFE) in Australian life
– in a village atmosphere with city comforts"
2. Provide models for stakeholder groups, destinations and products to help them assess potential and identify development focus areas.
3. Provide "Service Delivery Guidelines" to businesses advising how to adjust service, information and product delivery to make it easier for Chinese visitors to engage with and enjoy the experience.
4. Develop a digital Information Delivery System (eg. WeChat) involving all key Visitor Economy stakeholders to assist and direct the Chinese visitors to businesses that can best meet their needs. In conjunction with this, also seek to improve Wi-Fi quality overall.
5. Seek to improve overall directional signage for tourist attractions and key tourism areas and to gain support from hire car companies to provide simple instruction sheets and to monitor GPS systems.
6. Adopt a multi-level Development Support Program (as outlined in the Development Report) to provide a clear pathway for tourism operators to build relevant capability.
7. Adjust SATC's current customer targets to include first time visitors to Australia, as well as Chinese students and local communities in Adelaide, Melbourne and Sydney for the VFR market (as currently a majority of visitors are in this category).
8. Adjust the current approach to sales and marketing to include the student market and local Chinese communities in Adelaide, Melbourne and Sydney to build awareness, knowledge and referral and continue to build targeted distribution channels.
9. Communicate the strategy, the development plan and available materials amongst key Visitor Economy stakeholders and participants and SATC staff.
10. Commit and engage through dedicated resourcing to manage the overall development, to harness stakeholder involvement and to work with tourism operators.

SATC ASSESSMENT REPORT

ASSESSMENT – OVERVIEW

There is never enough time to fully review and investigate all areas of a city and state, however, by looking at a number of visitor touch points and using a combination of inputs, there is the ability to get a strong "feel" for they key issues, opportunities and challenges.

For South Australia, we looked at the touch points of Arriving, Driving, Eating & Drinking (Dining), Interacting (Cultural Understanding / Service), Shopping (Retail), Staying, Travelling (Public Transport) and Wi-Fi.

I accessed a number of different sources for this input namely:

1. **Personal Experience**
   During my ten days in South Australia I looked at various elements: first from a western visitor perspective and then from a Chinese visitor perspective.

2. **Local Input**
   I met with a number of key stakeholders and influencers and sought their feedback on their overall thoughts in their own sector such as:
   - Do you think SA is getting their fair share of Chinese visitors?
   - How well do you think we are catering for them?
   - What things are being done to help?
   - What issues are there?
   - What do you think is needed?

3. **Tourism Operators**
   In the one-on-one sessions I sought feedback on key challenges, issues and areas for improvements, including outside their scope of business, as well as discussing their specific product.

4. **Experience**
   I have conducted projects similar to this project for SATC for a number of local councils, regional tourism areas, as well as State Governments in Queensland, NSW, Victoria and Tasmania and drew on this experience in terms of appeal, reality, and competitiveness.

5. **Consumer Research**
   Independent consumer research was conducted to monitor social media commentary in China and to survey non-group Chinese visitors on holiday in SA.

The results of the consumer research are included in some of the touch point assessments. Overall, Chinese visitors were "surprised" by Adelaide and South Australia – although this was from low expectations. So the challenge is to lift the expectations and continue to exceed them, despite changing levels of Chinese visitor travel experience.

The Australian side quite rightly had higher expectations – probably and correctly seeking to provide great service and deliver satisfaction that exceeds strong expectations. This is good as it is exactly what will be needed moving forward.

Overall there was a feeling that the Chinese visitor opportunity is bigger than SA's current share. However, given access, the size of the student and local Chinese communities, and the promotional resources available vis-a-vis competitor destinations, **I believe that SA is in fact getting its fair share but that the size of that share can be increased**. Obviously direct air access will jump start this, but only if the offer is clear and strong and the delivery can meet Chinese visitor needs.

In terms of how well SA caters for Chinese visitors, there was general agreement that currently, it is not enough. **I think a key issue here is the lack of understanding of Chinese visitor needs and a belief that to meet them everything has to be turned 'Chinese"** – which is not the case. A key requirement in better catering to Chinese visitors is to "make it easy for them to engage" with authentic Australian experiences and lifestyle.

This is highlighted I believe in the "things that are being done to help Chinese visitors" feedback. Nearly all comments related to technical elements or assets like Chinese language materials, Chinese speaking staff, or a Chinese website. All of which are only useful if they are developed and delivered with cultural understanding. In many cases simple English assistance or service delivery adjustments can mean so much more. There is a definite need to "uncomplicate" things.

The issues raised were quite consistent and included:

– Customs congestion in the mornings at the airport
– The lack of tourism attraction directional signage in the city and surrounds
– Wi-Fi access and quality as well as mobile phone reception in regional areas
– Public transport extending to key visitor areas in the city
– Limited Chinese language information
– Several opportunities present themselves in relation to the visitor information centre
– The limited range of shopping; night activities (in the city and outside); capacity especially in February / March (which can coincide with Chinese New Year peak holiday period)
– Operational hours generally (but especially in regions).

From my experience these are in fact common issues to nearly all destinations and especially regional areas and there are some quick wins available but there is also the need for some longer term investment.

In terms of **"what is needed" obviously the key feedback was "response to the issues", but there were also strong requests for help and guidance**. Firstly, to help South Australian business operators and key industry stakeholders to understand what is needed and secondly to help them implement adjustments in a cost effective manner that will also assist integration of Chinese visitors with current clientele and their needs.

It was also felt that promotional messaging is too general and should be more specific (eg: seek to own "Seafood" within the food category), that there needs to be more "packaging" of the products and experiences (like half day to 3 day itinerary ideas and "trail" ideas), and to increase marketing to Chinese visitors.

This feedback combined with the following touch point assessment details is constructive feedback for SA and highlights a number of opportunities and areas for improvement which then informs and directs the Development Plan and its priorities.

As mentioned above, it is my opinion that Adelaide and South Australia have a good solid base from which to move forward, but, as expected, attention is needed to build understanding in order to build capability and engagement. In competitive terms, I believe most other destinations are in a similar position to SA, however their size and scale offer greater challenges. The exception would be Tasmania which is in a very similar position to SA. So now the time is right for greater focus and action.

THEMES

NATURALNESS

Australia's key unique selling proposition for Chinese visitors for many years was "Accessible Nature" – the combination of city attributes and the close proximity to see nature. While this is still a very important part of the appeal, in recent times this has expanded to include touching, feeling and engaging with all things natural: the land, the wildlife and the produce (food, wine, and crafts, as well as the Australian people themselves and their lifestyle) – in essence **"Naturalness"**.

It is no wonder that for Adelaide and South Australia, **naturalness** is the standout hero and the cornerstone of everything else. As the research found, naturalness amplified all the other categories and was an integral part of the satisfaction of them. More details are provided in the various research sections of this report.

"Naturalness" has very clear meaning for westerners, but does not have a direct translation in Chinese, so it is necessary to demonstrate it rather than try to describe it and this is very possible for Adelaide and South Australia.

From a city that is surrounded by parks, the beach precinct of Glenelg and the proximity of the Adelaide Hills, Barossa, McLaren Vale and Victor Harbor to the further away areas of Kangaroo Island, Port Lincoln and Mount Gambier – there is a strong sense of nature.

This is strongly supported by the range of products and experiences that are available in these areas including:

- visiting the city markets
- cuddling a koala
- patting and feeding kangaroos
- driving in the country
- walking in the vines
- tasting and sampling a world renowned wine brand only 8 km from the city
- seeing wildlife in its natural habitat on Kangaroo Island
- catching and eating seafood fresh from the sea at Port Lincoln.

In fact, these products and experiences themselves authenticate a naturalness proposition and provide substance in the category.

The naturalness theme is also strongly supported by the size and scale of Adelaide and the country feel of the surrounds which provides a "village-like" atmosphere and a real sense of "local". This extends to the products and experiences as well, where in many cases Chinese visitors can meet the owners, growers, makers or producers, and where service is "Australian natural" – friendly, warm, a bit of fun, but still professional.

Whilst competitive destinations all lay claim to Naturalness (and all have it in various ways) I believe that the combination of proximity, ease of access, range of product experiences that provide it and "localness" provide Adelaide and South Australia with a competitive advantage in this space (shared only with Tasmania) and that Adelaide and SA have the ability to own this space from a city-centric perspective.

FOOD

Food is at the core of every Chinese person's psyche. Food is much more than just sustenance, it is a critical part of life. Chinese believe food affects energy, life balance, happiness and overall health. Like everything, food is also associated with "Face" – where you can "win" it (which is good) or "lose" it (which is not good). Food also has meaning and whilst quality is important (as it is more expensive), fish and seafood denote wealth and prosperity.

The link to naturalness cannot be over stated when talking about the food proposition for Chinese visitors and this again is strongly supported in the research.

The freshness of produce, the holistic experiences of catching, cooking and eating (whether that be fruit from an orchard, grapes from the vine, seafood from the sea, or herbs from the garden), local produce on menus, or simply being able to visit the markets are all highly sought after experiences, and thus winners. Adelaide and South Australia have them all, and many of them are integrated into tourism products already.

The challenges come when Chinese visitors try to experience local cuisine and dining on their own and this is explored further in the touch points section dealing with Dining on page 19.

Another important element is "comfort" food, provided by retailers such as Asian grocery stores, the smaller noodle shops in areas such as Renaissance Food Court in Rundle Mall, and even the Chinese food sections in key supermarkets. These tend to be forgotten when information on food or dining is provided. Having a good Chinatown is an added bonus for Adelaide.

Food also needs to be seen from a gift giving perspective, as local produce is a great authentic present and this is further explored in the touch points section dealing with Shopping on page 21.

There is no doubt that Adelaide and South Australia can compete on the food and produce front with products already offering farm-gate style experiences and thus substance in the category. The challenges come in terms of moving from produce to dining and these are discussed later in the report.

WINE

Chinese visitors link wine directly with "naturalness" and so to a large extent wine is more about the environment of the experience, rather than wine appreciation. This was strongly supported in the research.

Chinese visitors want the full winery experience – walk in the vines, learn how it is made, taste and sample – but in most cases they want to do it faster than their western counterparts.

In a large majority of cases actual wine knowledge is low but due to the rising status of wine (and especially red wine in China), there are major bragging rights associated with a world renowned brand like Penfolds, the 100-year-old birth date bottles from Seppeltsfield and a known brand in China like Jacobs Creek.

Then there is the high end, more knowledgeable Chinese (either visiting for pleasure or business), who do want to seriously engage with the experience and who are seeking more private and exclusive options. I was very pleased to see the current range of facilities available in this category and the exciting developments like St Hugo's at Jacobs Creek in the Barossa.

Like-wise the Seppeltsfield "village" and Jacobs Creek and St Hugo "precinct" approach and planned developments (where the wine experience is supported by a range of activities associated with nature) is absolutely perfect for Chinese visitors.

The National Wine Centre in Adelaide offers the potential to be the showcase for all South Australian wines and offers a great opportunity for future development. There is so much potential to add local produce and create a great "learning and sampling" centre.

There is also the ability to build the category through the inclusion of McLaren Vale, which was mentioned in the research and showed appeal. But, in my opinion, this should be a secondary focus for development.

So the rising status of wine, a world recognised brand, and products that directly appeal to the Chinese visitor, combined with naturalness and proximity, and the National Wine Centre potential, provide substance in the category and thus competitive advantage.

WILDLIFE

I am not sure that there is anywhere in Australia that does not claim wildlife, or the ability to see it, as an asset. But Adelaide and South Australia offer the real ability to "get up close and personal" in a range of ways, at a range of venues, that definitely create competitive advantage.

Being one of only two destinations where you can actually cuddle (in addition to pat) koalas is a key strength.

Having both the Gorge Wildlife Park offering a small, personalised and quite intimate offering and the Cleland Wildlife Park offering a full sized open range (National Park) facility within 1 hour of the city provides ease, options, and a sense of comfort / low risk. The Adelaide Zoo's proximity to the city is also a bonus.

Adding in Kangaroo Island, which offers a range of wildlife in its natural habitat and which again can be done in a day (but preferably two), makes the offering very strong. A bit further afield, the opportunity to see or dive with dolphins or even sharks adds excitement to the proposition in South Australia.

I believe that the combination of proximity and products does provide a strong offer but the actual product highlights need to become the messaging – the wildlife experiences need to be seen (and proven) to be "do-able".

DESTINATIONS

The focus of this report was on six key identified destinations in South Australia.

ADELAIDE

A number of positive attributes have been noted in this report in regards to Adelaide, nearly all of which relate to the size and scale of the city. However, Adelaide is viewed more as "big town / small city" when compared to Melbourne or Sydney. But Adelaide and SA need to recognise this aspect and use it to their advantage. Research respondents certainly did!

Adelaide has the necessary "city comforts" including:
- a good range of accommodation options
- a good range of food options (although there are challenges as discussed later in the touch point section on Dining on page 19)
- supermarkets in town and in the suburbs
- shopping options and areas (although again with some challenges)
- and the public transport system Adelaide is good.

There is, however, a "quietness" about the city which can be seen as a positive in terms of a relaxed pace and lifestyle, but can cause concern simply due to the lack of people. I certainly found this walking around on a Sunday at 4pm. This quietness also extends to night time activities which are limited, apart from the Casino not for the gambling but as a place to be with others around.

ADELAIDE HILLS

This area ticks all the boxes for a Chinese visitor:
- a visitor can effectively be in the country in 20 minutes
- the driving is relatively easy although signage is an issue, discussed further in the touch point section on driving on page 18
- there are great scenic views
- local markets and local produce makers
- and **Hahndorf!**

In other words, there are a range of relevant and appealing options, a range of activities (look, see, touch, feel and taste) and the ability to do lots of things in one day (pace).

Hahndorf deserves special mention as it, in itself, has most of the appeal elements and led by the Hahndorf Inn they are now harnessing the power of these and helping other businesses adjust appropriately. The latest Hahndorf activity sheet for visitors is the perfect example of simplifying the offer and making it easy. A single sheet of paper showing the location of businesses that are relevant to Chinese visitors (local produce and crafts), which each of them display at their outlets. This not only guides and directs visitors but in itself provides more reasons to stay longer and to visit at all!

This concept could be extended to the whole Adelaide Hills area – to, in effect, create a "trail" guide of relevant products for the Chinese visitor.

BAROSSA

Due to the fame of its wines, a visit to this area provides bragging rights in itself, but it is also the natural environment, the ability to walk in the vines (not available in all wine areas in Australia) and the range of options and level of interactions that are available that impress Chinese visitors.

This applies very much to the wineries where there is the opportunity to be really involved or only a little involved in:

– the actual appreciation of wine
– taste and buy premium and specialty wines
– join the wine experience with a food experience
– or simply enjoy the venues themselves.

The developments since I last visited the area three years ago in terms of winery venues and the products they offer all make the offer stronger, and given future plans for the region this looks set to continue.

These developments have also seen the range of food options increase. Three years ago it seemed like the only food choices were at extremes of the scale, with the options only a pie or a 2-hour degustation offering. Despite the improvements, I still found it difficult to find something simple to eat.

In terms of staying overnight, the difficulty is in providing reasons to do it – given its proximity to Adelaide and lack of available night activities in the region. The positive is that there are a range of Chinese visitor suitable accommodation options from Lyndoch Hill's comfortable accommodation and great local produce dining showcase to The Louise and a full gourmet option. This range of options needs to be promoted along with the benefits of being able to sample wines with dinner without driving.

The biggest issue was the lack of signage overall in the Barossa. For what is meant to be an iconic and major tourist destination and what are meant to be major iconic wine tourism products the signage was noticeably poor. This is discussed further in the touch point section on Driving on page 18.

LIMESTONE COAST

There was not a lot of comment in the research about the region as whole but Mt Gambier and the "blue lake" did get particular mentions and approval by the respondents.

Proximity is always touted as being important but it is mainly viewed in terms of time. Proximity also needs to be viewed in terms of location pertinent to key driving routes. The popularity of the Great Ocean Road and the Twelve Apostles at Port Campbell with the potential to carry on to Adelaide has seen growing business in both group coach business and the fast developing self-drive market for this region.

Being the largest regional town outside Adelaide should be used as a strength for the region to highlight elements such as "local" and "Australian" products. It should be noted that while facilities at Mount Gambier are limited Chinese visitors rave about the motels where they are met by the owners on arrival and the rooms can fit in the whole family. The Chinese visitor views some things differently and simple things such as these immediately become strengths.

EYRE PENINSULA

There are great comments in the research, not surprisingly revolving mainly around Port Lincoln, the sea and seafood but also including the natural beauty of the area and the range of activities available.

The catch, cook and eat seafood options, the ability to swim with dolphins or even sharks, the ability to interact with non-city Australians and the "real" Australian lifestyle are all features here.

The experience in the region is doable in one day (although two is better), flight frequency and costs are good, there is a choice of accommodation options (from the refurbished Port Lincoln Hotel to a quality YHA) and the area boasts one tour operator who fits the hero category and another seriously committed to meet Chinese visitor needs with one of their programs.

KANGAROO ISLAND

There were great comments in the research, not surprisingly because Kangaroo Island provides access to a range of wildlife in their natural habitats and an overall natural environment of cleanliness and health. It provides a real "wow 'factor.

It also surprises with its limited development and infrastructure as Chinese visitors often assume that because Kangaroo Island is an "iconic destination" it will be commercialised and over-built. This limited development, however, is an issue because whilst this is a key feature, it also affects the range of facilities and capability overall.

Proximity to Adelaide and the wide range of tours available from one day, low-engagement group tours with Chinese speaking guides to high-engagement personalised one day and overnight options, make this very doable – if you have help.

The self-drive option tends to be more challenging for Chinese visitors due to the actual capability on the island in terms of;

- eating;
- finding their own way around to make sure they see the key sights
- the actual time needed
- the lack of night activities
- early closing hours of dining outlets
- and the accommodation choices offered.

I believe that, at this stage, Chinese visitors to Kangaroo Island need to have help and will enjoy the experience best with "local" expertise and knowledge – the kind they get if they are on a tour of some sort whether highly-tailored or not.

Some small adjustments could make a lot of difference if operators are willing. For example, the stars are amazing from the Island and I have spoken previously about the potential for a "Sounds of Silence" type product which would provide for later dining / night activities as well as provide a reason to stay overnight.

FLEURIEU PENINSULA

The Fleurieu Peninsula region was not specifically included in the research or visited by me on my initial visit to South Australia. The region did however get favourable mentions in the social media comments and I believe certainly has relevancy and potential with the ability to deliver against the Naturalness, Food & Wine and wildlife themes.

Over the course of the next few months I will be reviewing the destination and conducting workshops and one on one meetings with key products in the region.

TOUCH POINTS

ARRIVING

There are three main ways to arrive in Adelaide – by road, train, or air. The majority of this assessment relates to the airport experience.

In terms of arriving by road though, it is a fairly easy with highways, nice scenic approaches and relatively good signage that directs you through the suburbs and into the various parts of the city. The Central Bus Station on Franklin Street is well located and provides good access to the CBD overall as well as public transport and taxis.

Train arrival is a bit more challenging with the station not being located in the CBD but facilities and transport options are good.

Adelaide airport provides a good level of service for Chinese visitors – it is modern, clean, provides a single terminal for both international and domestic, and its small size makes it very easy to get around.

Discussions however highlighted that there are some efficiency issues that need to be addressed and work is already underway to further improve services.

In the domestic arrival hall I found the airport experience quite pleasant and relatively easy and was pleased to see the noodle shop food outlet providing a Chinese "comfort food" option, but retail options and service delivery need improvement. I also found that the toilets at certain times are a long way from the gates and the locked off international area inhibits easy access.

On arrival I did not see or find any Information Kiosk, although I understand there is one in the baggage area, and found the lack of signage for taxis combined with a very separate public pick up area was difficult to navigate.

It should be noted that Uber services are very popular in China and their technology provides directions, translations and payment in a form that the Chinese visitor is used to – in other words it makes it easy.

My discussions with key stakeholders combined with the research we undertook provided feedback about the lack of dedicated VIP facilities as opposed to airline lounge facilities at the airport and I recommend that this be investigated further.

It is very obvious that the airport management have a strong commitment to customer service and are aware and monitoring key delivery elements, and more importantly are investing to continually improve facilities and service.

DRIVING

As Chinese travel more and gain more experience and confidence and a large percentage of Chinese visitors are visiting friends and relatives (VFR) it is not surprising that more of them are now driving, with tour guides or independently, especially to regional destinations. There are also now Motorhome Chinese visitors on the East Coast and this is becoming more popular as they grow more confident.

There are many stories of the challenges this is causing both in Australia and especially in New Zealand as, like usual, "Chinese visitors do things differently"! In China a major highway is a four lane dual carriageway, not a single lane like many sections of Australian highways. Chinese visitors think they are on a small road not a major thoroughfare and stop to take pictures.

Off the main highways, Australia offers a wide standard of even smaller roads, including dirt roads, which can be main connectors between key towns and where speed limits and road signs are for drivers experienced with the conditions. This poses real challenges for Chinese visitors and is the major cause of damage to rental cars.

There is also the challenge of knowing where you are going and having signage and systems to help you. This is where I found the biggest issues.

During my visit I decided to try and use just a basic tourist map and the signage on the roads to direct me. I got lost four times just getting out of Adelaide to go to the Adelaide Hills and the Barossa, and then found real challenges getting to some of the other attractions.

I was really surprised to find that there was very little directional signage to an iconic tourism destination like the Barossa. I was expecting signs every 10km or so from the city all the way to the iconic wine region. I only recall viewing 2-3 signs mentioning until the Barossa until I got to Gawler. I was even more surprised when the first real signage offered was at a Y junction that showed both ways as leading to the Barossa. Thinking I was OK, I chose an option and then found myself on a small road, with very little traffic, getting much more "country" and "rural" and less green and lush by the minute. At this point I deferred to the electronics.

In the Barossa I found the signage within some areas, especially Seppeltsfield as a town and then as the winery very limited. "Follow the palm trees" was the best instruction from most people in terms of a "touring route".

I encountered similar issues in the Adelaide Hills, firstly getting to Gorge Wildlife Park and then from there through to Hahndorf. Having turned off the main highway onto Gorge Road, I enjoyed a great scenic drive, however, with no signage along the way this drive started to become uncomfortable and again caused concern.

On the drive to Hahndorf I found that the largest and most frequent signage was for Melba's Chocolate Factory along the way. This does not make sense – signage and direction should denote importance of a destination or attraction and international visitors see it this way.

Of course to avoid these directional issues, I could have simply used electronic assistance from the start. As it happens I did in fact defer to the electronics a few times just to check where I actually was. This sounds all well and good but whether it is Google maps on your phone, or a GPS system, there is a key issue and that is that they give you the shortest route. But unless you program the device differently, the shortest routes are not necessarily the best routes, as they do not assess road grades. This means that you can be directed to very small backroads with driving challenges.

South Australia is not the only place that needs to address these signage issues. Chinese visitors in Tasmania are encountering the same issues and ending up on the top of mountains, on very low grade roads, and ultimately needing assistance.

Car rental companies have the ability to reprogram their GPS to take account of this issue and need to be encouraged to do so. I also believe that they have a responsibility to assist renters with finding their way around, and can provide some very simple things to help.

I recently hired a rental car in Sydney to go to the Hunter Valley and asked the desk for advice. They gave me a small single sheet of paper (a bit smaller than A4) which had 10 dot points starting with "turn right from the car park" and which I used, along with road signage to easily get there.

Even from a western point of view the signage is not always adequate in terms of driving directions or tourist attractions and the small help sheet instructions were very helpful. For Chinese and other international visitors, it is even more important and in terms of the proposition of "easily enjoy" this issue needs priority.

EATING AND DRINKING (DINING)

General research shows that one of the stated desires of Chinese visitors is to "try local cuisine", but indicates that one of the biggest challenges is that they are "not accustomed to local dining".

This is another area where **"Understanding" is much more powerful than the technical assets.** The three ways Chinese "lose Face" are through embarrassment, conflict and confrontation. A new range of food, served differently from what Chinese visitors are used to, where menus and terminologies are not recognised and where language is a challenge offers a multitude of ways of failure.

Key Suggestions:
- Simplifying menus including pictures of dishes where possible
- explaining local terminologies (writing "fish" after King George Whiting)
- colour coding menus to highlight local produce
- provide options for visitors to sample and try before they have to buy a full plate (shared plates or platters)
- and having Asian condiments available to allow them to "flavour to their taste"

This makes it easy for the Chinese visitor to engage with the experience. The addition of Chinese menus and Chinese speaking staff greatly assist, however, may not be cost effective or suitable for other clientele. In the product One-on-One meetings I conducted there was a lot of discussion about the poor conversion of Chinese visitors, in terms of the dining options offered, and in nearly every case the key suggestion listed, when reviewed, were identified as key difficulties and matched my recommendations for improvement.

From the products I met with on my initial visit to the State, the "hero" in this category has to be Hahndorf Inn. They embrace and combine strong understanding with great assets. Success of the Hahndorf Inn dining experience:
- They have tapped into the Chinese love of pork,
- provide a range of generous platter options
- bundle items to create "easy to order" packages (which include beverages)
- menus have pictures of the top rating / ordered (and expensive) dishes
- service is fast but also personable
- and, best of all, staff are trained in Chinese preferences, so they can directly assist Chinese visitors.

This even includes taking photos of the visitors – which is a critical element for Chinese but also gets Hahndorf testimonials and word of mouth / mouse!! They then add the Chinese menu option, the Chinese speaking staff, the Chinese social media and all the extras! Interesting that the key elements of their success has been relatively small adjustments to their service delivery.

I also had the opportunity to dine at Lyndoch Hill, who also understand the requirements of Chinese visitors and served a local produce degustation menu but in platter service. Each dish was explained in simple language with samples of local ingredients. There was also a selection of beverages – local beers, local wines and soft drinks where sampling was encouraged!

There was mention of some other restaurants in the city that can and do adjust their service delivery but this was based on specific requests rather than open availability. The key is not to change menus but rather to re-present them in a format that invites engagement and interaction rather than challenges it.

Adelaide itself has a very good range of restaurants available overall, however, many are "hidden gems" down lane-ways or in pubs which makes looking for them quite difficult. There is a wide range of Asian cuisines particularly in Chinatown and along Gouger Street, but the one missing cuisine was a Seafood restaurant with honest and simple fresh seafood. Seafood dining should be a "hero"! At present it appears that the Chinese restaurants actually promote SA's seafood the best.

Chinese visitors mostly like to eat early (6.00 – 7.30pm) and usually want relatively fast service. They are not used to having to book in advance, or to last orders being from 7pm in some regional areas (like Kangaroo Island) or even 9pm in the city. They also usually want "supper" and this can be anytime from 9pm onwards and they don't want kebabs or a pie floater! So information is critical as is the ability to find suitable outlets at suitable times.

This being the case the other key issue is how can Chinese visitors find or be directed to those outlets that can best meet their needs.

It was identified that training is preferable but there needs to be more practical advice made available to outlets about adjustment options. An on-line information referral system to relevant outlets would be beneficial but has to be cost effective and the challenge will be that for many outlets business outcomes are more important than business opportunity. There is a need to prove the value – maybe getting Dining "hero" product owners to be ambassadors for the cause or even speak at a small event.

It was also agreed that there was greater potential for the National Wine Centre to be a key attraction for Chinese visitors by providing a "Showcase for the Best of South Australia" and that SATC should investigate this further.

For more information please refer to the "Eating & Drinking Service Delivery Guidelines" on the SATC corporate website www.tourism.sa.gov.au

SHOPPING

Shopping is a key element in a Chinese visitor's holiday program from both a cultural and a personal perspective and is a major component of their holiday spend.

Culturally, the Chinese visitor needs to buy a range of gifts for their family, friends and business colleagues – who they "left behind" and who have "managed things for them" whilst they have been away.

These gifts are a sign of respect (and Chinese "face") and need to be an authentic representation of the places visited and the experiences gained. So "Made in China" products are not acceptable and "local" is key.

Due to "face" and hierarchy it is necessary for Chinese visitors to purchase a range of product levels and multiples of the same product, so that status is recognised and maintained eg: woollen mittens x 10 colours, woollen scarf x 10 colours.

After purchasing gifts they can then focus on buying for themselves and this includes luxury goods (as they are cheaper here) and higher quality "treats" like wine. Also a number of more general items are purchased, like vitamins (Blackmores is well known), natural skin products (especially Jurlique) and local "natural products" – both produce and craft (brands like Maggie Beer are well-known).

Interestingly, there is also high demand for basic items due to perceived value (quality and price) including manchester, confectionary, and more recently even Weet-Bix (due to a product placement in one of the highest rating TV dramas!!!) so supermarkets and department stores are also very relevant shopping sources.

To illustrate this, a new Woolworths has opened in the Nelson Bay (Port Stephens) CBD where a group of 15 Chinese visitors spent nearly A$4,000 in a 30-minute visit – with about A$1,000 being Australian lollies, followed by vitamins, skin care and some Weet-Bix!!

Again, the association with "naturalness" comes through very strongly and this is why the local markets, access to local crafts, and directions to where Chinese visitors can buy "local" South Australian or Australian products and brands (especially those known in Asia) are so important.

The research had limited responses regarding shopping, which I take as an indication that most Chinese visitors were not expecting a great shopping experience.

However, the "naturalness" and "local" themes were the highlights – the weekend market at Rundle Mall, Hahndorf' s range of produce and craft factories (including the ability to sample and taste) and the local displays of produce (which usually involves their whole range – linking to the multiple purchase need!).

Wine is a key "local" produce purchase and it appears to be well catered for through the wineries and their overall products and cellar door options. An opportunity to be investigated further is the post-visit purchase capability, which can be achieved with the Union Pay e-commerce option.

It is therefore clear that there are applicable products for purchase – the key challenges are letting the visitors know where to find the products and then providing access to them.

Rundle Mall, as the main shopping precinct in the city, will be a "must visit" destination, but it was obvious from my recent visit and discussions with Rundle Mall Management Authority (RMMA) that there is a need for much stronger overall signage to assist Chinese visitors in particular to find the products they want.

RMMA are currently developing a new Digital Way Finding system for implementation by December 2016, which includes touch-screens and device connectivity, and hopefully this will go a long way towards solving the problem.

In terms of Chinese visitors, I think there needs to be specific identification of relevant outlets with relevant products. Without building a specific "Chinese" section or system, I believe this can be achieved by highlighting "Australian Made" and "Local Product" shops or outlets that carry them. For example, Jurlique has a specific shop but is also available in David Jones. Brands like Maggie Beer and Blackmores would all be included. Even the inclusion of the Wellness Spa using Australian products. Such an identification would help all customers not just Chinese visitors.

In terms of the overall Information Delivery Platform, this is exactly the kind of information that is needed and I suggest that within the scope of the Digital Way Finding project, RMMA also investigate a linkage to WeChat.

There is also the need more generally to highlight the locations and produce / products available – like the Central Markets and the Adelaide Hills & Hahndorf – within the Information Delivery Platform.

The availability and promotion of the Union Pay payment option cannot be over stated for all retail outlets. It provides a "welcome" signage in its own right for Chinese visitors but more importantly, it is a system that they know how to use. It gives them comfort to buy and provides a licence to spend money!

My last point is about promoting to the Chinese market – both visitors and locals – especially during their key celebration time of Chinese New Year. Whilst, Chinatown will be a key focus, it is important to "be seen to be involved" even to a small degree. This time is also a time when gifts are exchanged and all retailers have the opportunity to participate from simple red banners to lucky number 8 sales ($8, $88, etc). I believe it is important that Adelaide and surrounds, as a whole, shows support during this auspicious time for Chinese people.

At present I am unaware of any specific China training, development or acknowledgement programs for the retail sector via the Retailers Association. Rundle Mall has held some China training with the Confucian Institute but attendance was low and they advise that Myers and David Jones have "China knowledge".

For further information please refer to the Shopping Service Delivery Guidelines available on the SATC corporate website www.tourism.sa.gov that covers the above key points, as well as the importance of superstition around numbers and therefore pricing.

STAYING

One of the key elements for any destination seeking Chinese visitors is the choice and range of accommodation. Drawing on general feedback and discussions with the AHA, it appears that there may be some challenges but also opportunities to enhance the experience and options available to the Chinese visitor.

In terms of the overall range of accommodation, Adelaide offers a good selection of lower-end 3 & 4 star options (hotels, motels, and serviced apartments) as well as some 5 star options.

A good portion of this is, however, "older" stock (as low returns have limited refurbishment investment) but there have also been new developments like Quest on King William Street and Franklin Street, Ibis on Grenfell Street and The Mayfair on King William, with a number of international chains currently reviewing opportunities in the CBD and regional South Australia.

Glenelg also has a range of accommodation options from serviced apartments to 4 star hotels.

Moving outside the city and surrounds, and heading for more regional destinations specifically those identified as priority areas, the choices for visitors reduces.

The style of accommodation on Kangaroo Island generally, including home rentals and small B & B's, is not that relevant to Chinese visitors, as the "older country accommodation style" of the hotels is not that appealing for them. However, the luxury-end is catered for, to a degree, by Southern Ocean Lodge.

Port Lincoln has seen the refurbishment of the Port Lincoln Hotel, that provides good facilities in a 4 star range. There are also more personalised accommodation options with the key tour operators.

Mount Gambier offers a good range of motel accommodation and as noted this is what is expected along with some specialist / boutique options.

The Barossa has a wide range of accommodation options from hotels, to boutique, to luxury along with a range of smaller B & B's. At the higher-end of the market, properties like The Louise provide a holistic gourmet stay (for adults).

Elsewhere, there is good motel accommodation available with many aligned with the major chains who are actively promoting to Chinese visitors. In line with this, the AHA does not have a specific China training and development program but some of its key members (Accor, Hilton, and Mantra for example) have strong programs, some of which are linked with China Ready and Accredited program.

Regionally, there is the issue of staff availability and skills, but again, some basic understanding and guidance will assist in service delivery and hopefully alleviate some delivery costs.

The biggest potential issue, however, is in capacity in the CBD. Discussions indicated that the success of the "Festival and Events" program sees occupancy reaching **90-95%** already in February and March and then at 80% levels in October and November. School holidays also affect capacity in places like Glenelg and the regions.

Given that Chinese New Year, the peak visitation period for the Chinese, can occur from the 2nd week in January to the 3rd week in February, depending on the lunar cycle, this could prove a real bottleneck and potentially an issue for tour operators.

Apart from the formal hotel options, there are also the Youth Hostels and the Caravan & Holiday Park options. These are enjoying increased patronage, especially related to self-drive. The standards and the range of options in both segments have changed dramatically over the last few years and some of their locations are spectacular.

Similarly, Youth Hostels are no longer just dormitory style but now offer a product range from multi-share bunks to private doubles and singles, great value for money and a range of facilities. The YHA at Port Lincoln is a perfect example of this.

In the Holiday Park segment, Discovery Parks and Big4 are seeing increasing numbers of Chinese visitors and are actively promoting to them and working to increase the service delivery capability of their member Parks. The cabin options are the most relevant and oft-booked option, although there is a small but growing motorhome demand. The improving capability of their members should be leveraged and these groups need to be part of the overall product mix.

For more information please refer to the "Accomodation Service Delivery Guidelines" available on the SATC corporate website www.tourism.sa.gov.au, which provides samples of "Information Sheets" designed to tackle some of the most common issues reported by accommodation providers across Australia in regards to their Chinese visitors.

PRODUCTS

A key component of the assessment process was to prove there are in fact products available that support the key theme areas of Naturalness, Food, Wine, and Wildlife, and that some of these products have the appeal and capability to meet Chinese visitor needs today.

Prior to my visit, in discussions with SATC management, we identified a range of products that were China relevant and already actively engaged in the market. During my visit I conducted individual 3-hour One-on-One Assessments with each of those products.

The assessments verified that there are indeed current products with capability in each of the categories, although, in nearly all cases, some improvement in actual capability or engagement has been suggested.

In line with the Development Plan, the next step for the SATC is to audit all current products and classify them using the PACE models into 4 categories according to their level of relevance, appeal, capability, and engagement.

Heroes:	The first category, "Heroes", are those operators that have the proximity and product / experience qualities that will have strong appeal for Chinese visitors and already have an operation that will suit Chinese visitor requirements with only small adjustments and tailoring needed. These products will be the leaders in the categories and are the key drawcards / highlights.
Supporters:	The second category, "Supporters", includes products who have proximity and appeal for Chinese visitors but are not big enough drawcards in their own right, and / or whose operations require more adjustment and tailoring.
Prospects:	The third category, "Prospects", includes products who have proximity, and appeal, but require major improvement to their capability and engagement elements and at this stage should probably simply seek to implement small basic changes.
Future:	The fourth category, "Future", are those products who at this stage lack the necessary proximity and appeal, as well as capability and engagement, but may have potential as the Chinese market to SA develops and grows.

For the more general visitor economy, there is an additional category, **"Service Assistance"**, that includes, not so much tourism products per se, but commercial businesses that can assist Chinese visitors with their experience, and for which you need to provide information.
These include:

Shopping:	Australian, as well as local produce and products
Eating:	Asian and Australian (and key Theme) options
Supplies:	Asian grocery stores or shops that stock Asian food items.

A list of current product active in the Chinese market was used as the basis to identify other products that could potentially be categorised as Hero and Support products.

The list of currently active products raises the issue of the need for operators to not only be China Capable, but to also be China Willing. Whilst a product may be of appeal and relevance the operator may not be "willing" to make adjustments or cater to the Chinese visitor market.

The Development Plan is all about "Building Business" and this involves building capacity for more Chinese visitors, as well as expanding the hero and support product range. The idea is to build a pipeline from Future products to Hero products over time, and building "willingness" is part of that process. It is also necessary to ensure that Hero and Support products implement adjustments and developments as required.

There are also a number of areas where we identified some potential, but currently the Chinese visitor demand and / or the product capability is very small, such as:
– Festivals
– Sporting Events
– Fishing Tours
– Indigenous Tourism options
– Art and Culture Tourism options.

The Service Delivery Guidelines section available on the SATC corporate site www.tourism.sa.gov.au provides further assistance, including a suggested Development Plan for tourism operators.

THE RESEARCH

I highlighted a number of key findings from the research in the Executive Summary but the following insights are worth noting for consideration.

The research involved monitoring a range of key travel social media sites in China (most of which involved travel bloggers or experienced travellers sharing their experiences) and reviewed 92 comments. It also involved 88 face-to-face 30 minute interviews with actual visitors at product sites. Total results were filtered in order to account for and / or validate any bias.

Visitors were in the upper income bracket, not travelling on a packaged tour and demographics were very much in line with Chinese visitors to Australia overall. I noted in the Executive Summary the strong influence of VFR which needs to be considered.

The most revealing outcome of the research overall was that Adelaide and South Australia "surprised" Chinese visitors in a very positive way. They arrived with relatively limited knowledge and low expectations but left with expectations exceeded. Notably, the lack of people, lack of traffic, ability to get around town quickly and general slower pace of life became relatively positive attributes (at least until the visitor can't get what they want when they want it!!).

Whilst this is a good position to be in, South Australia was the favourite holiday destination in Australia for only half of the respondents (and there is usually a bias towards the region in which the survey is completed). **This is a concern as they do love South Australia but they love other places more. SA is not leaving visitors with the same positive impressions that other States have.**

"Naturalness" is a key hero and creates the largest emotional response for Chinese visitors. However, they find it difficult to articulate exactly what this means and are unable to express it to others. Naturalness also amplifies their experience in the other appeal areas of food, wine, and wildlife. It is not any single element but the combination of all, led by nature, that resonates so strongly.

Respondents state their ability to interact and engage with nature and natural things as the most valued asset of their visitor experience. This is not just scenery and produce, but also the size and scale of Adelaide and its surrounds makes it "local", and visitors see this as providing access to real Australians, authentic Australian lifestyle, and importantly, the owners / producers of the produce – be it food or wine.

As previously noted, Adelaide itself is seen as an easy place to get around – "the 20-minute city" as described by some – due to its small size, square grid lay out and public transport (trams and free bus routes). Glenelg was viewed as its own precinct separate to Adelaide city and the tram connection was again rated well.

The natural produce theme continues in commentaries about Eating with local, fresh seafood topping the list and inclusive of the holistic food experience of catch / cook / eat!! Port Lincoln was the hero here. Chinese are also great lovers of pork and the highly rated seafood experience is followed by the pork hock (and hot dogs) at the Hahndorf Inn where it is "easy and busy". There are lessons here in terms of appeal and engagement and these are explored later in the report.

Naturalness continues as a key them in terms of drinking – where not only the wineries and wine are of appeal but just as importantly, the natural setting of them and the ability for visitors to explore and engage with nature. Again it is the holistic experience of **look & see**, plus **touch & feel**, plus **taste & sample**, plus **listen & learn** – all in an environment of safety and comfort, easily accessible from the city.

Visitors did not expect very good public transport outside of the city and expected to self-drive. Favourable commentary here related to the lack of traffic, the great scenery (including gardens in the suburbs) and the relatively small distances to key attractions / areas.

Shopping gets limited commentary, most likely indicating this is not seen as a strength and therefore not really expected. In line with all other Chinese visitor research, the shopping that does get mentioned relates to local, natural produce and its availability in the Adelaide Hills and local markets in Rundle Mall on a Saturday morning.

The key focus areas of this report all rated well in terms of delivery of naturalness. |Kangaroo Island topped the appeal list with its wildlife, the Barossa due to the environment and the wine, the Adelaide Hills due to the scenery, local produce and food, the Eyre Peninsula for its seafood, Limestone Coast for its scenic lake and Adelaide for its "greenness" and "local feel". As stated previously, Glenelg was seen as a separate precinct with blue sea, white sand, and a "local feel". The Fleurieu Peninsula, including Victor Harbor and McLaren Vale also rated well.

There were, however, comments regarding the degree of difficulty faced in interacting and engaging with some of the destinations. Most of these revolved around rational elements such as eating, drinking, and / or dining options and timings (especially at night), as well as about the time needed to properly experience places like Kangaroo Island and the need for "local knowledge" as opposed to "do it yourself" in some areas.

Commentary was made about the lack of information available overall and the rational comments above suggest that there is a real need for better and more detailed information provision.

DEVELOPMENT PLAN – OVERVIEW

China and the Chinese visitor market offer great potential for Adelaide and South Australia as outlined in the SATC Activating China 2020 strategy document.

The reality is, however, that with this great opportunity comes a range of challenges and to "Win SA's Fair Share" there needs to be understanding, adjustment, patience, persistence, and, most of all, a holistic approach to development.

The approach must involve the total visitor economy and its constituents at every Chinese visitor touch point and provide leadership, guidance, assistance, and a pathway for businesses to build capability and capacity.

This **Development Plan** is designed to provide such an approach and details the key recommendations outlined in the Executive Summary namely:

1. Combine the key "themes" of Naturalness, Food, Wine, and Wildlife to create a simple and single minded proposition based on:

   "Adelaide, South Australia – where you can easily enjoy the good natural things

   – Nature, Food, Wine, and Wildlife in Australian life

   – in a village atmosphere with city comforts"

2. Provide models for stakeholder groups, destinations and products to help them assess potential and identify development focus areas.
3. Provide Services Delivery Guideline materials to businesses advising how to adjust service, information and product delivery to make it easier for Chinese visitors to engage with and enjoy the experience.
4. SATC and industry to develop a digital Information Delivery System (I suggest investigating WeChat) involving all key visitor economy stakeholders to assist and direct the Chinese visitors to businesses that can best meet their needs. In conjunction with this also seek to improve Wi-Fi quality overall.
5. Seek to improve overall directional signage for tourist attractions and key tourism areas. Gain support from hire car companies to provide simple instruction sheets and to monitor GPS systems.
6. SATC and key stakeholders to adopt a **multi-level Development Support Program** (as outlined in the Development Report) to provide a clear pathway for tourism operators to build relevant capability.
7. Adjust SATC's current customer targets to include first time visitors to Australia, as well as students and local Chinese communities in Adelaide, Melbourne and Sydney for the VFR market (as currently the majority of visitors are in this category).
8. Adjust the current approach to sales and marketing to include students and local Chinese communities in Adelaide, Melbourne and Sydney to build awareness, knowledge and referral. Continue to build targeted distribution channels.
9. SATC to communicate the **Development Plan** and available Service Delivery Guideline materials amongst key visitor economy stakeholders
10. Commit and engage through dedicated resourcing to manage the development, harness stakeholder involvement and to work with tourism operators.

POSITIONING

As noted in the Executive Summary this project has also included a review of the overall positioning and proposition that South Australia offers Chinese visitors – including the overall State proposition of "A great place to work, live and do business – Your Doorway to Australia", the specific tourism messages and positioning being promoted through various social media and advertising channels, as well as the actual available product and service experience.

Discussion feedback and the research indicates that there is a difficulty in "summing up" the different experiences (it felt good but not sure why), so visitors tend to describe a range of features, rather than any key benefit.

The SATC needs to investigate simplifying the tourism proposition and to play to South Australia's strengths of "naturalness", "local", and "easy".

Tasmania has been highly successful by using real products, real people, and real experiences to prove "substance in the category", rather than using adjectives and words.

They have managed to take ownership of specific key appeal themes and experiences by being specific, rather than general. For example, whilst "Nature" was being promoted as a theme, Tasmania used actual Walking Products, with details and pictures to convey that Tasmania was able to offer this experience, and, more importantly, that it was "do-able". Tasmania's current activity is positioning specific "seafood" products as Heroes under the general Food (and Naturalness) theme. They have had great success and are now basically known as "the fresh, natural State" amongst Chinese visitors who turn up seeking the specific products.

I suggest this is exactly the approach that South Australia should also use – where the products themselves provide the specific messages that prove the positioning.

The research indicated that respondents state their ability to interact and engage with nature and natural things as the most valued asset of their visitor experience. This is not just about scenery and produce. The size and scale of Adelaide and its surrounds makes it "local" and visitors see this as providing easy access to real Australians, authentic Australian lifestyle and importantly, the owners / producers of the produce – be it food or wine.

Adelaide was referred to in the research as a "20-minute city" and an "A1 Village" – attempts by visitors to explain this proximity, slower pace and localised advantage. It is a key point of difference for Adelaide from Melbourne or Sydney – it makes Adelaide "do-able"!

It may be challenging for South Australians to accept this local village persona but the truth is that Adelaide will not succeed by trying to compete against Melbourne or Sydney on "city" terms.

The back translation of the introduction to your current WeChat site actually projects the concepts of naturalness and the laid back, quieter lifestyle but in a lot more words and without the specifics of details or products:

"South Australia reflects the natural beauty of Australia's in most pure form, the most warm and friendly local customs , abundant local wildlife and a variety of unmissable natural and organic food , fresh seafood and Australian wine which embodies Australian quality.

South Australia is also known globally as the "festival state", having more festivals than other Australian states. When you step foot in South Australia, relaxed, laid back style, simplicity and open space will make you completely forget the heavy work and fatigue of daily life. It can be said South Australian is a preferred destination where tourists experience the Australian idyllic scenery and modern life at a slow pace."

This is not about taking up a new position *per se* but expressing it in a different, simpler, more cohesive and relevant manner that will resonate with Chinese visitors and help them express the reason for their enjoyment to others in their testimonials and word of mouth / mouse.

My recommendation is that SA's positioning be based on the following concept:

Why:	**"Adelaide, South Australia – where you can easily enjoy the good natural things in Australian life** **– Nature, Food, Wine, and Wildlife** **– in a village atmosphere with city comforts"**
What Things:	Specific products / experiences available in each category
How:	Hero product operators
For What Benefit:	See, Learn, Discover, Taste, Touch, Feel and Enjoy
Supported by:	The city attributes of Adelaide

This positioning offers an experience where Chinese visitors will feel comfortable to interact and engage, without concern for their safety through the invitation to easily enjoy. They should feel like Adelaide, South Australia provides a simple, natural place to explore and discover "the real" (natural) Australia.

As already noted, the key to any good positioning is the ability to support it with proof. If you are going to claim you have something then you really do need to have it! Thus, if you claim to have a certain category, like wildlife, then you need some "substance in that category" to support it. My one-on-one assessment sessions with product and discussions with the SATC team regarding other potential products I was unable to meet with, indicated that SA can lay claim to unique products in the selected categories.

The other key supporting element of any proposition is, of course, the brand and its name. Chinese translations are all about "meaning" not "the word", so in terms of Chinese translations it is in fact the proposition that is the hero more-so than the company name. So your translation should talk about benefit first ("Where you can easily enjoy the good natural things in Australian life: nature, wildlife, food and wine, in a village atmosphere with city comforts") before adding "brought to you by Adelaide and South Australia". This will also help SA in Chinese search sites, where they search by meaning, not by actual word, so it is a win-win all round.

There also needs to be a "local but tailored" tonality to everything. Where SA shows that you want visitors to be part of your community / village, where visitors can feel comfortable, be amongst "friends", feel welcome, and be able to be themselves, at their own pace.

CHINA PACE ASSESSMENT MODELS

As mentioned in the Executive Summary, the acronym "PACE' is directly related to the key difference about how Chinese visitors want to engage and interact. They are seeking to do as much in 10 days as Australians would in 4 weeks. Our normal pace of life and activity is their slow, and our slow is not for them. They look to be active and "relaxing" is not on their list. They want the experience compacted but not diluted – holistic but shortened. They want authentic Australian experiences, including interaction with Australians and our lifestyle, and they want assistance in "how" they can achieve this, rather than just a list of what they can do. They want options within a structure.

So the one certain thing is that businesses wanting to win Chinese visitor business and service them will need to understand both these differences and their implications and then tailor and adjust their service and maybe even product delivery.

As previously mentioned, there is a lot of commentary about being "China Ready" but I believe there are actually more steps to the process, namely being China Relevant, China Willing, China Capable & China Active.

This premise was supported in our discussions, leading to the belief that "creating the assets without the understanding" will lead to failure, and that the China market and Chinese visitor business is not for everyone, and, certainly, not for everyone right now.

The need to assess the potential of destinations and product in order to identify likely chances of success, relevant levels of investment, and identifying key areas requiring additional development is central to the planning and development plan of any organisation hoping to increase their share of the Chinese visitor market.

In response to this need for a simple and widely applicable methodology, Fastrak Asian Solutions has developed the "China PACE Assessment Models", which enable review of destination / product suitability and potential against the four key criteria of:

Proximity:	Ease and cost of access
Appeal:	Meeting visitor needs – key motivators and unique experiences
Capability:	For destinations – the necessary range of products / services and for Products – adjustments to delivery
Engagement:	The degree of difficulty needed to engage with the experience – whether time, depth of experience, or ability

The models allow for classification of Destinations into Strong, Medium and Low Potential and for classification of Products into Hero, Support, Potential and Future.

For further information on the China PACE Assessment Models" and to access the 88 point checklists for both Destination and Product models please contact the Destination Development Team at the SATC via email at satctourism@sa.gov.au.

Naturally these are not definitive models. It may well be that, despite very low potential, a destination or product receives Chinese visitors, but the models do provide an intuitive indicator of the chances of success.

The models are designed for initial "self-assessment", but to be most effective it is recommended that an independent knowledgeable party is involved or at least consulted to remove any bias and provide comparative reality. To be effective – the assessor needs to be brutally honest.

Most of the sections of the PACE Assessment Models are self-explanatory, however for many the Unique Selling Proposition (USP) will be more of a challenge and again requires brutal honesty. For more information to assist destinations and products to develop strong USPs please refer to the Service Delivery Guidelines fact sheet 'Getting started with China Checklist' available on the SATC corporate website www.tourism.sa.gov.au.

SERVICE DELIVERY GUIDELINE MATERIALS

There is no doubt that Chinese visitors are different to other visitors – they ask different questions, they seek different things and they have different cultural nuances and customs.

If businesses understand why these differences occur then they can seek to pre-empt issues, manage the customer better, provide better service, information and delivery and minimise disruptions to their normal business systems and processes – a win-win situation!!

As such, the following Service Delivery Guideline materials provide businesses across all areas of the visitor economy with tips on how to adjust service, information and product delivery to make it easier for Chinese visitors to engage with and enjoy the experience.

The following Service Delivery Guidelines and help sheets referred to in this report are available on the SATC corporate website, www.tourism.sa.gov.au

1. Getting started with China Checklist
2. Knowing the Chinese visitor
3. Understanding the Chinese visitor
4. Face
5. Superstition
6. Eating and drinking (Dining)
7. Language
8. Shopping
9. Information Provision
10. Accommodation
11. Product Adjustments
12. Sales and Marketing
13. China Development Program

INFORMATION DELIVERY PLATFORM

The travel experience and maturity of Chinese visitors, the difference in the way they interact, cultural norms (especially "face" and fear of losing it) and their different requirements mean that a lot of the current information provided is not relevant, or does not focus on key needs areas for them. As such there is a need for better, more, and slightly different information overall.

At the time of my visit there was only one Chinese language visitor map ("Go") in addition to the SATC Chinese brochure and a review of these shows some very "different" base information and highlights from the usual Western maps in English. Since my visit, I understand there has been the launch of a new 90 page Chinese visitor Guide for South Australia produced by Australian Chinese Newspaper Group (ACNG), but I am yet to review it. Either way, tailored post arrival information for the Chinese visitor remains limited.

Given the Chinese visitor's high dependence on, and usage of, on-line mobile devices for research, planning, translations, and, of course, photos and social media, it would be prudent to tap into this.

Wi-Fi connectivity and quality is a key issue around Australia and whilst Adelaide's free city Wi-Fi access was noted and appreciated by research respondents, the overall quality of Wi-Fi in South Australia was rated poorly.

I still believe there is an opportunity for information delivery through on-line channels, especially in Adelaide, and suggest exploring a WeChat delivery platform involving key stakeholder organisations to help and direct Chinese visitors to the most relevant commercial and Government touch points.

SATC already has a WeChat account and the Adelaide Airport advised that they are looking to implement a WeChat based beacon directional flow system. A number of stakeholders and hero products also have WeChat accounts. Setting up accounts is also easy so overall participation would be very cost effective.

It must be noted that this WeChat Information Delivery Platform is not just a listing but rather a qualified referral program.

SIGNAGE

As noted in the Executive Summary and in the Assessment Report, I found signage to, and for, key tourist attractions very limited even in Adelaide and especially in regards to Barossa. This has the potential to negatively impact not only Chinese visitor satisfaction but also safety.

As a matter of priority I recommend that there needs to be:

1. A full review of current signage to and for key tourist destinations and attractions in and around Adelaide in order to:
   a) Identify the scope of the issue,
   b) Engage responsible agencies in discussing the issues, and
   c) Develop a White Paper for Government and local Councils.
2. Engagement with hire-car companies to review current information and directional assistance in terms of key tourist destinations and attractions in and around Adelaide, and to specifically investigate:
   a) Their current GPS settings with a view to agreeing to restrict directional advice on low grade roads, and
   b) Their current ability to provide simple paper instructions and the potential to develop common use tools.
3. Ensure that "Driving" assistance is included when reviewing visitor information and delivery.

DEVELOPMENT SUPPORT PROGRAMS

SATC, tourism industry associations and stakeholder organisations have conducted various China training and development programs over the last few years.

There are a number of programs now available which provide specific elements of the required education and development knowledge in regards to:

- understanding China as a market;
- Chinese visitor needs and requirements;
- leveraging cultural nuances to deliver service excellence & business advantage;
- alleviating operational issues and costs;
- adjusting / tailoring the offering and service with the ultimate aim of maximising profitability.

There is a definite need for a tiered program that can provide a step-by-step approach for businesses from Getting Started to Getting Immersed: - a program that helps product identify what it means to be China Willing, China Relevant, China Capable and China Active.

As such, I recommend combining a range of current programs into a Development Support Program, where responsibility and accountability for different levels lies with different organisations.

The proposed **Development Support Program/ China Development Framework** allows SATC, SATIC, FAS and other key industry partners and training providers to work in partnerships to deliver a assistance to tourism operators and play the most relevant roles for their business charters.

This recommended 'Development Plan' provides tourism operators as well as players in the larger visitor economy, with a development pathway within a structured development program where they can choose the level (and the method) they believe is most appropriate to their needs.

The ATEC KITE Program provides for "local" trainers to conduct the sessions or, alternatively, for a webinar series. Fastrak Asian Solutions is also a nominated presenter of this program.

The Getting Started range of programs and the one-on-one Assessment visits offered through Fastrak Asian Solutions have already been used by the SATC in the development of this report.

The China Ready & Accredited program provides a "China Ready" certification for individuals and for companies (recognised by the Chinese Government) and has an official website for consumers in China. The program is a combination of on-line and face-to-face training and requires a demonstration of the business in question having basic elements already in place. In fact, this is the current training platform for the Restaurant & Caterers Association.

China Digital Agency provides a range of services including research, social media activity, audio translation services, as well as assisting with basic business services for China, including translations. Their "Starter Pack" range provides a set fee, set materials, and set quantity of the business basics.

I was also made aware of a South Australian Chinese audit program being by Huan Ying Ni currently being piloted and targeting the retail sector which could also be added to the offering. Details are available at www.huanying-ni.com.

CHINA DEVELOPMENT FRAMEWORK

Stage	Service	SATC	ATEC/ SATIC	Australia China Business Council SA	Business SA	China Digital Agency	China Ready & Accredited	Chinese Language & Cultural Advice	Confucius Institute	Fastrak Asian Solutions	Sinosphere	TSS
Introduction to Inbound Tourism	International Market Research	●		●		●					●	
	International Marketing: • Understanding inbound tourism • Working with the inbound distribution system • International Tourism Market profiles/information	●	●							●		●
Getting Started in China Are you relevant and do you understand China? Are you willing?	Cultural Awareness Training		●	●			●	●	●	●	●	●
	Brand development & Marketing: • Strategy and branding • Market Research • Developing your unique selling proposition		●	●		●	●	●		●	●	●
	Understanding how to do business in China		●	●			●	●	●	●	●	●
Capability & Development Are you capable?	Marketing Collateral: • Translation services • Brochure/flyers • Websites • Trade collateral • Business Cards			●	●	●	●	●	●		●	●
	Mandarin language courses			●				●	●		●	
	Business Assessments (One on One)			●		●	●	●		●	●	●
	Business Mentoring			●			●	●		●	●	●
	Customer Service Training			●			●	●	●	●	●	●
	Product adjustments	●		●			●	●	●	●	●	●
Sales & Marketing Are you active?	Advertising and Sales			●		●	●				●	●
	Engaging Distribution Channels (inbound//wholesale/retail)	●	●	●			●			●	●	●
	Digital online platforms • Website • Video content • E-commerce			●		●	●	●			●	●
	Social media			●		●	●	●	●		●	●
	Trade Missions and Sales Meetings	●	●	●			●			●	●	●
	Consumer/Market research and feedback services			●		●	●	●			●	●

Each of the service providers have individual and total responsibility for their products and services and all transactions would be contracted between the individual business operator and the service provider.

Full details of the China Development Framework are provided in the Service Delivery Guidelines section available on the SATC corporate site www.tourism.sa.gov.au.

CUSTOMER TARGETS

The current Chinese target markets and customers for South Australia as defined in the Activating China 2020 Strategy are:

– Couples aged 35-54 years
– Affluent middle class – household income RMB 120,000+
– Experienced travellers and already travelled to Australia
– Travel independently or in quality customised small groups
– Geographically concentrated in Beijing Shanghai, Hangzhou, Guangzhou and Shenzhen with consideration to Qingdao

A large percentage of the Chinese visitors surveyed were groups of family / friends / relatives – which means that "Australian resident Chinese" were more than likely the decision maker on where and what was visited.

Surprisingly though, 44% of those surveyed were on their first trip to Australia.

A good percentage of these were also student related, which highlights the direct interaction between the education sector and the tourism sectors, within South Australia and also with the other key Chinese student populations in Sydney, Melbourne, Brisbane, and to a lesser extent Perth.

These trends have been the case throughout Australia in terms of "out of city" and regional growth of Chinese visitors and will continue to grow, but, as direct air access commences later this year and the number of non-VFR mainland Chinese visitors increases, these visitors will most likely have less experience and / or knowledge.

As such, I believe the current targets need review and, in my opinion, to change as follows:

In China:

- Couples aged 35-54 years
- Affluent middle class – household income RMB 120,000+
- Experienced travellers **who may have already travelled to Australia**
- Travel independently or in quality customised small groups
- Geographically concentrated in Beijing, Shanghai, Hangzhou, Guangzhou and Shenzhen with consideration of Qingdao

In Australia:

- Local Chinese communities
- Tertiary Chinese students
- Residing in Australia either permanently or temporarily
- Referral points and decision makers regarding choice of holiday inclusions
- In Adelaide, Melbourne, Sydney, with consideration of Brisbane and Perth

This change in targeting will also necessitate a change in distribution and marketing channels.

DISTRIBUTION CHANNELS

I always recommend a strong association with Inbound Operators in Australia (who work with their agents in China in a targeted manner) as the starting point for products to sell into the Asian and China markets and SA has good local operators, who do exactly this. It can however be a long process to get product into programs.

There are also some alternate options available in addition to building the "traditional" ITO channel.

The other main opportunity is to work with key Chinatown agents who package and sell a range of Australian products locally in the key student and business population cities of Sydney, Melbourne and Brisbane to get packaged, known and sold domestically, which in turn provides visibility and endorsement to your target customers. Again here SA has a "local Chinatown" domestic tour agent who packages and sells a range of SA products to local Chinese in Chinese language.

The local Chinese Chamber of Commerce, universities and Australia China Business Council (ACBC) are key channels that also need development.

In line with this more direct approach there is a need to create visibility in key Chinese publications in these Australian cities. This is very cost effective, as you can generally arrange some editorial to go with your advertising – or even run a competition to get extra coverage.
At present the Chinese Melbourne Daily Group and the Wai Wai group (based in Sydney but national coverage) are being used effectively.

In China there is a growing Online Travel Agent (OTA) market and many of them in fact link with some of the more traditional online Western sites. The three key sites for bookings at present are booking.com, Agoda, Expedia, so these channels need to be investigated.

It will be recommended to build both traditional and on-line distribution channels, however, at this early stage, SA can afford to target key players in each channel, and in each market.

The "Service Delivery Guidelines- Sales and Marketing" are available on the SATC corporate website includes tips on the sales approach and sales calls www.tourism.sa.gov.au.

COMMIT AND ENGAGE

There is no silver bullet to success, but having a plan and taking the first steps are essential ingredients in the mix.

And success is more than the sum of the ingredients – it requires the mixers' skill, imagination, enthusiasm and involvement.

It is essential that all key industry stakeholders, including state and local government, private enterprises and industry bodies, and tourism operators commit to engaging in this plan to ensure South Australia is collectively working towards delivery quality experiences and infrastructure for the growing Chinese market in our state.

There also will be the need for co-operative marketing and engagement with a variety of key stakeholders and the development of partnerships with service providers to closely work with tourism operators to build the necessary capability and product range.

It will take time to build and will require patience, persistence, and perseverance. The recommended **Development Plan** for South Australia should lead to competitive advantage, increased customer satisfaction and endorsement, and ultimately an increased share of business and profit.

For further information contact
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