

CHINA

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GENERAL MARKET OVERVIEW

- **Population** 1.33 billion (July 2008 estimation)
(Excluding Hong Kong, Macau & Taiwan)
- **Major Markets** Beijing 15.81million
Shanghai 18.15million
Guangdong 93.04million
 - Guangzhou 10.04million
 - Shenzhen 8.46million
- **Language/s** Spoken – Mandarin
Read – simplified Chinese
- **Currency** Renminbi (RMB)
- **GDP Growth** 2009 8% (estimated)
- **Annual Leave Entitlement** 14 days
- **Public Holidays 2010** 1 January (New Year)
13-15 February (Chinese New Year)
1 May (Labour Day)
1-3 October (National Day)
22 September (Mid-Autumn Festival)

Economic overview

- In the first half of 2009, the GDP of China surged by 7.1% over the same period in 2008. The growth was mainly led by the fixed-asset investment backed by the government. It is expected that GDP for the third quarter will further grow to 8.5%.
- The consumer price index went down by 1.1% in the first half of the year and continued its decline by 1.8% in July.
- Retail sales of consumer goods surged 15% in the first 6 months over last year.
- The average total income per capita and disposable income per capita in major cities of China in the first quarter of 2009 is:

	Total Income (RMB)	Disposable Income (RMB)
Beijing	8,019	7,064
Shanghai	8,951	8,113
Guangdong	6,888	6,284

- Despite the economic downturn, the number of Chinese with more than RMB10 million in investable capital has increased 6% to 320,000 in 2008. Beijing, Shanghai, Guangzhou, Zhejiang and Jiangsu accounted for the lion's share of the rich. The highest number was Guangzhou with 46,000, almost 15% of the national total.

MARKET PROFILE

- For the year ending June 2009, there were 356,000 Chinese visitors to Australia, a marginal decrease of 1% from the previous year. Declines were found in both business (-18%) and holiday (-2%) sectors but increase in education VFR and employment sectors.
- China is currently Australia's fourth largest inbound market for arrivals. China visitors spent an average of A\$6,596 per trip in 2008. Visitors spent 83% of their nights within the major gateways of Sydney, Melbourne, Brisbane and Perth.
- In 2008, 179,836 or 53% of all visitors from China were repeat visitors.
- The most popular leisure activities undertaken by visitors whilst in Australia in 2008 were: shopping for pleasure, eating out at restaurants, going to the beach, sightseeing and visiting botanical or other public gardens.
- The arrivals from China are traditionally higher from January to April, peaking during Chinese New Year month and declining during May/June.
- The most visited State was New South Wales (68%), followed by Victoria (47%) and Queensland (39%).
- After accommodation and food and beverage, shopping to take home was the most common spend item for visitors from China.
- The progressive liberalisation of tourism in China has led to broader and keener competition. European countries are well-received due to well-known brand names, culture, lifestyle, history and business-family link. The opening up of USA and Taiwan has diverted some of the traffic from Australia. As of 15 September, there are a total of 104 approved outbound destinations for the Chinese.
- The Chinese market went into decline around mid 2008, following the Sichuan earthquake, Beijing Olympics, global financial crisis, Government's and public's reaction of cutting outbound travel. Chinese arrivals declined further during May to July compared to the same months in the previous year because of the swine flu and the strict quarantine policy. Industry feedback indicated that the impact of swine flu was more severe than SARS. Arrivals to SA were seriously affected by the above factors, which recorded a decline of 33%.
- Majority of SA arrivals comprised of private, corporate and government official travel groups.

Visitor Numbers to SA (Source: Bureau of Tourism Research)

Year	04/05	05/06	06/07	07/08	08/09
Visitors	4,900	5,500	14,000	12,000	8,100

MARKET TRENDS

- Chinese consumers are required to book through a licensed agent for ADS leisure travel. Agents are the key to the ADS visa issuance process. ADS allows all Mainlanders to travel to Australia on private passports for leisure tourism purposes.
- Government delegations and technical visits, company incentives, study groups and FIT/experience seekers are not required to book through a CNTA-DIAC approved agent and travel on non-ADS visas. Non-ADS travel is becoming increasingly popular amongst experience seekers in the more established regions of Beijing, Shanghai and Guangdong.
- Since March 2008, visa access for experience seekers not joining group tours (or non-ADS leisure travellers) has been enhanced through the Streamline Subclass 676 visa. A total of 32 Chinese travel agents are now able to lodge applications for the Streamline Subclass 676 visa on behalf of their clients.

- According to a Tourism Australia survey, visitors from China were more likely to plan their trip to Australia 1-3 months before departing China.
- Visitors travelling for VFR were more likely to have shorter flight booking patterns than holiday visitors, with 30% of VFR visitors booking between 1 and 2 weeks prior to travelling and 28% booking within 1 week of travel, compared to 8% and 11% of holiday visitors.
- Chinese consumers and trade require information in Chinese language.
- The market is still dominated by tour groups visiting two to three States.
- Majority of consumers are price conscious and competitive pricing is a feature of the market, especially during the periods of global financial crisis and swine flu. Package differentiation is generally on price rather than package inclusions in most of the areas although some agents in Guangzhou, Shanghai and Beijing have started launching higher end programs.
- Some consumers in developed travel regions are becoming more mature and seeking quality and varied travel options. It is expected that small private group and FIT travel will become more popular.
- Consumer travel sentiment has been significantly dented by the swine flu rather than global economic crisis and the strict quarantine policy.
- Travel information is much more readily available in China today with consumers able to access information on holiday planning via distribution partners, travel magazines, TV and the Internet.
- Cairns (2nts), Gold Coast (2nts) and Sydney (2nts) are the most popular stopovers in the market. Great Barrier Reef and Sydney are the must-see destinations for the Chinese.

DISTRIBUTION IN THE MARKET

Online Environment

- According to a survey conducted by Nielsen China Outbound Travel Monitor, the internet has become the most important medium for China's growing number of tourists to plan vacations. While most Chinese visit traditional travel websites for research, they are likely to finalise their itineraries via interaction with other netizens on social networking platforms. Nearly 100 million Chinese netizens regularly visit online bulletin boards to share opinions, ask for help or socialise with friends, according to 2008 figures from the China Internet Network Information Centre. Overall, the online environment in China is evolving quickly yet travel bookings to long haul destination are mainly through travel agents due to destination visa requirements and the inability to process electronic payment.
- The SATC has launched a Simplified Chinese language website for Chinese trade and consumers as they are unlikely to research destination information in English.

Retail Agents

- Commission Level: 5 – 10%.
- In Tourism Australia's 11 ADS priority regions, there are 87 ADS travel agents who have the authority to handle ADS groups to Australia.
- Selected online travel portals are becoming popular, particularly with the sale of air tickets, accommodation and FIT free and easy packages.
- Retail travel agents will maintain a dominant role in the Chinese market. It is expected that they will continue to act as both tour operators and retail travel agents and that the number of retail travel outlets will continue to increase.

Aussie Specialists

- The Aussie Specialist Program has been launched in 15 key ADS regions. The key targets for training are the Tourism Australia identified agents who are approved to handle ADS business to Australia. The online program has been translated into Simplified Chinese for the agents. As of July 2009, there were 3,384 staff from 370 travel agents registered in the ASP in which 44% were fully qualified ASP agents.
- Tourism Australia launched a Premier Aussie Specialist Program in early 2008 with an objective to improve the delivery of high quality travel experiences to Chinese tourists. 35 Aussie Specialists were awarded Premier Aussie Specialists in April 2009.

Wholesalers/Large Agents

- Commission Level: 15 – 20%.
- Wholesale travel agents emerged in Beijing, Shanghai and Guangzhou in 2003. Their role is to receive bookings from other travel agents, particularly those operating outside the traditional ADS regions or who are not large enough to form groups independently.

Inbound Tour Operators

- Commission Level: Up to 30%.
- Australian Inbound Tour Operators (ITOs) must be accredited by the Department of Immigration & Citizenship (DIAC) and the CNTA to handle ADS leisure business from Chinese agents. The accredited ITOs have agreed to the 'China ADS Quality Standards Code of Ethics' set out by the CNTA and the Australian Tourism Export Council (ATEC) in conjunction with DIAC. Tourism Australia has recommended Australian tour operators to deal only with the licensed ITOs for all Chinese inbound business, as the market has seen a proliferation of unlicensed operators.

KEY THEMES/ EXPERIENCES PROMOTED IN THE MARKET

- Adelaide – the Capital of Good Living (lifestyle, wine)
- Barossa – winery visit, wine-tasting, "Make your own Blend", Whispering Wall
- Adelaide Hills – Mount Lofty, Hahndorf German culture, fruit picking, wildlife park
- Fleurieu Peninsula - Granite Island, horse drawn tram, penguin-watching
- Kangaroo Island - Unspoiled nature and wildlife, local produce

KEY AIRLINE CONNECTIONS TO SA FROM CHINA

- There is no direct service from China to Adelaide. Passengers are required to transit either in Hong Kong, Singapore or in East Coast cities of Australia.
- Qantas, Singapore Airlines and Cathay Pacific are all significant providers of service for Chinese inbound visitors to Australia.
- Percentage of carriage to Australia in 2008:
 - Qantas Airways (28%) flies to SYD, MEL, BNE or Perth from Shanghai and Hong Kong
 - Air China (14%) flies to SYD or MEL from Shanghai and Beijing
 - Singapore Airlines (8%) flies via SIN
 - China Eastern Airlines (10%) flies to SYD or MEL from Shanghai
 - Cathay Pacific Airways (15%) flies via HKG
 - China Southern Airlines (7%) flies to SYD or MEL from Guangzhou

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2008/09

SATC/Tourism NT/TA/CEPT Travel Joint Promotion Campaign

- Timing: Apr-Jun 2009
- Partners: Tourism NT, TA and CEPT Travel Shenzhen
- To promote SA's key experiences including city lifestyle, wine, nature and wildlife through joint tactical advertisements in local daily, editorials, direct mail to credit card holders.

Joint Promotion with Shanghai Air Tours

- Timing: Apr-Jun 2009
- Partners: Shanghai Air Tours, Jacob's Creek
- Co-op advertising campaign with Shanghai Air Tours to promote SA itinerary with a visit to Jacob's Creek. Jacob's Creek sponsored a bottle of red wine for every two pax.

Joint Promotion with Tourism NT and Shanghai Railway Tours

- Timing: Apr-Jun 2009
- Partners: Tourism NT, Shanghai Railway Tours
- To promote NT+SA itinerary through print advertising, seminars, websites and direct mailing.

Media Gatherings (Shanghai)

- Timing: 3 Nov 2008
- Partner: Grebstad Hicks Communications
- A presentation on Adelaide, Barossa and Kangaroo Island with the themes of food & wine, nature and wildlife was conducted to 19 PRC media.

Australian Travel Mission to China (ATMC) 08

- Timing: 3-7 Nov 2008
- SATC together with SeaLink and Tranquil Travel attended the 12th Australian Travel Mission to China. 46 sellers and 109 ASP agents from 15 provinces and municipals attended the session in Shanghai. During the module in Qingdao from 6-7 November, 29 sellers met with 50 nominated Premier Aussie Specialists(PASPs). PASPs briefed Australian operators on the current market environment. Discussions were carried out with focus on the issues and opportunities influencing Chinese travellers to Australia and emerging market trends.

Aussie Specialists Program Familiarisation Tour

- Timing: 16-20 Jun 2009
- A Premier Aussie Specialist Program's Famil was conducted from 16-20 June 2009 with a total of 9 ASP agents from China visited Adelaide, Adelaide Hills, Barossa and Kangaroo Island. The famil was aimed at improving their knowledge of South Australia.

MAJOR PLANS FOR 2009/10

National Day Promotion (Shenzhen/Guangzhou)

- Timing: Aug-Sep 2009
- Partners: Yue Qiao, BCTS
- Promotional activities included print advertising, website, flyers, agents' luncheon.

South Australia for Wine and Nature (Shenzhen)

- Timing: Oct – Dec 2009
- Partners: Tourism NT, CEPT Travel
- To build the awareness of SA focusing on wine, nature and wildlife experiences, and as a gateway to other States. Promotional activities include print advertising, editorials and direct mailing. The itinerary includes visit to Jacob Creeks and Penfolds "Make your own Blend".

Self Driving in South Australia (Shenzhen)

- Timing: Dec –Jan 2010
- Partners: Tourism Victoria, Shenzhen CITS
- To promote self driving tour to SA through print advertising, editorials and direct mailing.

SIA MOU Promotion (Guangzhou)

- Timing: Dec-Jan 2010
- Partners: GZL, Singapore Airlines
- To build awareness of SA by focusing on wine, nature and wildlife experiences. Promotional activities include print advertising, editorials, radio advertising, a consumer show and 1-minute footage to be broadcast in taxis and office buildings.

SIA MOU Promotion (Shanghai)

- Timing: Oct-Nov 2009
- Partners: Shanghai Jinjiang, Spring Travel, Singapore Airlines
- To build the awareness of SA focusing on wine, nature and wildlife experiences through joint tactical advertising.

Joint Promotion with Tourism NT and Shanghai Railway Tours

- Timing: Sep-Dec 2009
- Partners: Tourism NT, Shanghai Railway Tours
- To promote NT+SA itinerary through print advertising, seminars, websites and direct mailing.

Greater China Travel Mission (GCTM) 09

- Timing: Nov 2009
- GCTM provides an opportunity for the Australian travel industry to build awareness of Australian tourism products and services amongst the Chinese travel trade and media. GCTM targets the group and leisure travel markets and provides direct access to travel agents, tour operators, government representatives, media and airlines in China, Hong Kong and Taiwan. The event will also provide suppliers with information on new and existing issues affecting Chinese travellers to Australia.

ACTIVE INBOUND COMPANIES

- Tranquil Travel
- ETA
- Transglobal
- PTC
- Sunland
- Auga
- Golden Dragon

OPPORTUNITIES FOR OPERATORS

- Australian Mission To China 2009
- Participation in ATE 2010
- Hosting of Aussie Specialists Familiarisation tours for China agents
- Exposure of relevant products in our bi-monthly electronic newsletter (SATU) which is distributed to all travel trade partners in China
- Inclusion of relevant products in our tactical campaigns
- Exposure of relevant products on the upcoming new Chinese website and Media Blast

HONG KONG

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GENERAL MARKET OVERVIEW

- **Population** 7.02 million (July 2008 est.)
- **Language/s** Spoken – Cantonese (main dialect), English and Putonghua (widely used in the business environment)
Read – Traditional Chinese and English
- **Currency** Hong Kong Dollar (HKD)
- **GDP Growth** 2008 2.4%
2009 -3.5% to -4.5%
- **Annual Leave Entitlement** 12 days
- **Key Public Holidays in 2010** 1 January (New Year)
13-16 February (Chinese New Year)
2-5 April (Easter)
25-27 December (Christmas)

Economic overview

- Following a sharp year-on-year contraction of 7.8% in the first quarter of 2009, Hong Kong's economy in the second quarter was better than expected. Real GDP registered a smaller decline of 3.8% in the second quarter over a year earlier. The rebound was underpinned by the faster growth of the mainland economy and the easing of recessionary forces in the advanced economies. Nevertheless, the recovery path is still bumpy due to risk of gyrations in local asset markets, strength and sustainability of recovery in the advanced economies still certain as well as the uncertainties about the impact of the swine flu.
- Local consumer sentiments held up firmly during the quarter, along with the rebound in asset markets and the support from the various rounds of relief measures by the Government. Nevertheless, business sentiments remained cautious, given the still uncertain global economic outlook, leading to a further notable decline in investment.
- Labour market displayed much resilience. In tandem with the relative improvement in the economy, total employment stabilised in the second quarter. Inflation continued to come down. Overall, as compared with the performance during the Asian Financial Crisis in 1997-98, the Hong Kong economy appears to be more resilient this time round, even though the current global financial crisis is of a much larger scale.

MARKET PROFILE

- For the year ending June 2009, there were 135,900 visitors to Australia from Hong Kong, an increase of 3% from the previous year.
- Hong Kong is currently Australia's ninth largest inbound tourist market in terms of arrivals, with an average expenditure of A\$5,368 per trip, a growth of 14% over 2007.
- Majority of visitors from Hong Kong were repeat visitors in 2008 (68%). This was higher than the average of 59% across all markets.
- Visitors aged 35 to 44 years were the largest group from Hong Kong in 2008.

- Visitors from Hong Kong spent only 20% of their nights outside of the major gateways of Sydney, Melbourne, Brisbane and Perth.
- New South Wales was the most visited State, followed by Queensland and Victoria.
- The FIT segment is experiencing steady growth, and is supported by airline ticket-only promotion and growth of marketing campaigns conducted by FIT agents.
- The five most popular leisure activities undertaken by visitors whilst in Australia in 2008 were: eating out at restaurants and/or cafes; shopping for pleasure; sightseeing; going to the beach and going to markets.
- Australia's share of the Hong Kong outbound market (total 27.9 million departures) remained stable at 0.5% in 2008.
- The increase in visitor arrivals from Hong Kong to SA was largely driven by a decline in the value of Australian dollar between August 2008 and March 2009, aggressive airfares and tour promotions. However, the Australian dollar has appreciated between March and July 2009.

Visitor Numbers to SA (Source: Bureau of Tourism Research)

Year	04/05	05/06	06/07	07/08	08/09
Visitors	7,000	7,400	6,400	4,000	7,500

MARKET TRENDS

Consumer Booking Patterns

- Value-added offers tend to be what consumers are now chasing, preferring to spend a bit more for better quality, like 5 star hotel or business class upgrade with very competitive surcharge.
- Consumer travel sentiment has been dented by swine flu but the concern over it seems to be reducing.
- Short-haul destinations are more in demand.
- Demand for GIT packages to Australia (20% of the total) has decreased which negatively affects agents' enthusiasm in investing in new tours.
- Cruise holidays are getting popular.
- Competitive airlines' ad hoc offers attract consumers to purchase in advance for one-year ticket and further stimulate individual travellers' trend.
- The high and low season price difference is well noted by the consumer, and smart travellers will take low season advantage whenever possible.

DISTRIBUTION IN THE MARKET

Online Environment

- Most key operators and airlines promoting Australia have developed websites providing product information, special deals and newsletters.
- Airlines are using airfare discounts and frequent flyer bonus points to encourage consumers to book directly via the Internet. Both Cathay Pacific and Qantas also encourage e-bookings, with CX promoting their "Weekend Getaway" special online fare and Qantas launching their online booking engine.
- Although there are a substantial number of Internet users in Hong Kong and more than half of the households have Internet connection, consumers remain conservative about shopping online and tend to use the Internet as a research and itinerary planning tool, rather than a booking mechanism. Online specialists such as Zuji have increase marketing resources in Hong Kong to drive customers towards online bookings.

Retail Agents

- Commission Level: 5 - 10%
- There are ten major wholesalers/retail agents selling Australian group tour packages. The four major airlines offer FIT packages to Australia through Qantas Holidays, Cathay Pacific Holidays, Virgin Style and SIA Holidays. The major carriers continue to develop their own FIT-style packages.
- Agents are dependent on airline pricing to adjust the inclusions and itineraries to remain competitive. Packages often have a limited “shelf-life” and the frequent production of flyers provides an opportunity to enter into tour programs at various times of the year.

Wholesalers/Large Agents

- Commission Level: 10 -15%
- The market is dominated by a small number of key players that act as both wholesalers and retailers, supported by consortia made up of over 1,400 travel agents in Hong Kong.
- Wing On Travel and Hong Thai Citizen Travel are the two main retail agents with their own extensive branches which share 70% of the total group travel business.
- There are three major group wholesalers offering programs to Australia and sell to over 1000 retail travel agents. They are Jetour Holidays, SKY Travel and Charming Holidays.
- The major FIT wholesalers are the airline subsidiaries’ ‘Holiday’ departments which contributed the largest source of FIT business.

Inbound Tour Operators

- Commission Level: 20 - 25%
- Inbound Tour Operators (ITOs) handle all group business from Hong Kong to Australia and consequently provide a key role in developing new itineraries and products for the Hong Kong market.
- A large proportion of FIT and non-group business are also booked through ITOs.

KEY THEMES/ EXPERIENCES PROMOTED IN THE MARKET

- Adelaide (Lifestyle, food & wine, well-known brand names e.g. Penfolds, Jurlique)
- Barossa (Famous wineries, Penfolds ‘Blend your own tour”, Whispering Wall, fine dining)
- Adelaide Hills (Hahndorf, Mount Lofty, strawberry picking, wildlife park)
- Fleurieu Peninsula (Victor Harbor, Granite Island, horse-drawn tram, penguin-watching, whale-watching)
- Kangaroo Island (Unspoiled nature, wildlife and local produce)
- Limestone Coast (Self drive, unspoiled nature, wine and local produce)

KEY AIRLINE CONNECTIONS TO SA FROM HONG KONG

- Cathay Pacific and Qantas Airways are the significant providers of service to Australia. In 2008 there was an increase of 21% direct service operating between Hong Kong and Australia.
- Percentage of carriage to Australia in 2008:
 - Cathay Pacific Airways (53%) flies to ADL (daily), SYD, MEL, BNE, CNS and PER
 - Qantas Airways (32%) flies to SYD, MEL, BNE and PER
 - Virgin Airlines (7%) flies to SYD
 - Singapore Airlines (3%)

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2008/09

Promotion with SIA Holidays

- Timing: April -August 2009
- Partners: SIA, SIA Holidays, Jurlique
- To promote free and easy tour packages through tactical advertising with value added offers which included free Jurlique sachet packs, 1/2 dozen natural oysters, no weekend surcharge and 50% off on summer surcharge.

Weekend Weekly Guidebook Production

- Timing: October-January 2009
- Partners: TA, all STOs
- TA liaised with Weekend Weekly to produce a comprehensive Aussie Travel Guidebook to inspire first time Experience Seekers to visit Australia. TA paid for the printing cost and airfares and all STOs sponsored land arrangements. The Guidebook was redeemed by customers with Weekend Weekly coupon at a cost of HK\$20.

MAJOR PLANS FOR 2009/10

Promotion with SIA Holidays

- Timing: April 2010
- Partners: SIA Holidays, Singapore Airlines
- To continue promoting free and easy tour packages around food and wine, nature and wildlife.

Promotion with Miramar Travel

- Timing: Nov 2010
- Partners: Miramar Travel, TA, other STOs
- To promote GIT "Self Drive" tours in SA

ACTIVE INBOUND COMPANIES IN THE REGION

- Tranquil Travel
- ETA
- Wel Travel
- Australian Tour Management (ATM)

OPPORTUNITIES FOR OPERATORS

- Exposure of relevant products in the new Chinese website. Media Blast and bi-monthly electronic newsletter (SATU) which is distributed to all travel trade partners in HK.
- Inclusion of relevant products in our tactical campaigns

USEFUL TIPS FOR WORKING IN THE CHINA & HONG KONG MARKETS

- Personal relationships are very important in Chinese culture. Building relationships is vital for business.
- Chinese people place more attention on formalities and being courteous. If you visit an important person for business it is always respectful to take a small gift.
- Chinese people usually do not express their disagreements openly and directly, as doing so would be discourteous. The concepts of “Face” and “saving face” are very important.
- Be mindful of using colours and numbers. Black is considered sad, pink and red are happy, gold is excellent. Try to avoid the number 4, the number 8 is considered lucky.
- Never use clocks or anything with a ‘4’ as gifts.
- Chinese people generally do not touch each other. If you do not know someone, do not touch him or her.
- Try to avoid pointing at people with your finger.
- Be mindful of school holidays (July, August and normally January/February) and seasonal travel patterns to capitalise. Peak periods for travel are Golden Week (October) and Chinese New Year (Feb).
- English is becoming more common in big cities like Shanghai, Beijing and Guangzhou, but only some can communicate fluently in English. If there is a meeting in Chinese it is useful to arrange for a translator. People from Hong Kong usually speak English well.
- Try to avoid talking about Chinese politics and religion.
- Remember that China is the People’s Republic of China and Taiwan is the Republic of China. When you refer to Taiwan, do not say “Republic of China”.
- It is common social practice to introduce the junior to the senior, or the familiar to the unfamiliar.
- Addressing someone by his or her courtesy or professional title and last name conveys respect. In Chinese the name precedes the title. For example, Liu Xiansheng for Mr Liu, and Liu Jingli for Manager Liu.
- Drinking is an important part of Chinese entertaining and is considered a social lubricant.
- Chinese people prefer to travel in family groups, either immediate or extended.
- Generally prefer Chinese style food.
- Chinese people prefer hot meals (especially in winter), except some entrées and some summer foods such as cool noodle.