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Realising the Opportunities of Chinese Tourism: A Comparative Study

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This study was commissioned in mid-2019. Finalising it was challenging because of the Covid-19 pandemic. We are still in the midst of the pandemic, but we are now getting a better hold of the virus and our tourism future. As the world reopens to tourists, many destinations will welcome Chinese visitors again.

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Professor Can-Seng Ooi
Project Leader
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1. Introduction

Tasmania experienced exponential visitor numbers before the pandemic shutdown. Despite the disruption and the souring of the Australia-China diplomatic relations, there are still many reasons why visitors from China should be welcomed and will return. The Chinese market has become significant not only for Tasmania but also for Australia and around the world. Australia remains attractive among Chinese.

The increased numbers of Chinese tourists have drawn diverse reactions across the world. Many destinations aim to attract more Chinese visitors, cater to their needs, and promote a positive image to the visitors. At the same time, there are strong reactions against the bourgeoning presence of Chinese tourists. The issues are complex and destination authorities are trying to balance the contrasting demands of tourism development, economic prosperity, community development and local resistance. The pandemic has forced the tourism sector to take a breather and to reflect on the future. Lessons from the past remain invaluable.

In December 2019, China was the biggest source of international visitors to Australia (8,027,110, an annual increase of 2.7%) (Tourism Australia 2020). Tasmania received 42,700 Chinese visitors in 2019, a decrease of 19% over 2018, though China remained Tasmania's biggest international market (Tourism Tasmania 2020b). Tourism Tasmania (2020b: 5) have attributed this to "declining consumer confidence, geopolitical factors, and financial uncertainty" that had emerged prior to the Covid-19 pandemic. Nonetheless, tourism is re-emerging, and it is timely to discuss the opportunities and challenges now, rather than later.

China has become an economic superpower and is Australia's biggest trading partner. Its potential for Tasmanian tourism is tremendous. The economic and international relation benefits from the Chinese tourist market remain promising, especially when diplomatic relations improve. Those benefits however can be eclipsed by community concerns and dissatisfaction. Every tourist destination faces some inherent challenges that hinder the potential of using tourism as an opportunity for economic and community development. This project aims to explore some of these challenges from different destinations, so that the Chinese tourism market can be served and tapped into for the economic and social benefit of Tasmania. Tourism is an economic and community resource for the host society. The data collected in this report reflect what happened before the Covid-19 pandemic. The pandemic has created a new reality, but comparative lessons can still be learned. The China market will remain significant in global tourism.

Context

The project compared various strategies by tourism authorities in different Australian states and different countries in managing the Chinese tourist market.

In collaboration with experts in different destinations, this study conducted a media survey of five Australian states and three popular Chinese country destinations on how they attract and manage Chinese visitors.

After an initial round of data collected from mass media sources, a workshop was conducted in Hobart in November 2019. Participating colleagues discussed and exchanged their findings, drew comparative lessons, and provided context and insights into their own destination's strategy on attracting Chinese visitors and on managing the Chinese tourist market. Consequently, our comparison highlights best practices in attracting Chinese tourists, managing reactions towards them, and leveraging visitors to enhance Tasmanian and Australian perception and image.

Regardless, the increased presence of Chinese tourists drew both positive and negative responses in recent years prior to the Covid-19 pandemic. The tourism industry around the world has largely welcomed the economic benefits of the Chinese. Their needs are catered to in various ways. Nonetheless, there were also some negative local sentiments. The pandemic has also highlighted the existence of latent racism towards "Chinese-looking" persons around the world, including Australia (ABC 2020). Furthermore, the Chinese government has accused Australian society of racism in the current diplomatic spat (ABC 2020). Regardless, when borders reopen, we can expect Chinese visitors to return. This project will draw comparative lessons from the past through these three broad objectives:

1. Looking at how different destinations attract diverse Chinese tourists and identify the main success factors in each destination.

2. Examine how various businesses cater to the needs of Chinese tourists, and evaluate their successes and failures.

3. Investigate how sentiments towards Chinese tourists are managed (or not managed) in different destinations.

Notes on research design and methodology

By using a pragmatist world view (problem-centred, real-world, practice-orientated) the project wraps a realist comparative analysis around responses to Chinese tourists in five Australian states and three popular Southeast Asian destinations – Cambodia, Malaysia, and Singapore. We utilise a comparative approach to draw out best practices and relevant lessons for Tasmania.

Theoretically, a comparative method usually adopts a "control through common features" or "the most similar systems" approach to minimise variables (Pearce 1993: 22). By establishing the common bases, the development of theory is stimulated when differences are located, as empirical fields are specifically bounded by their own institutions, economic, social structure, and culture (Baszanger and Dodier 1997: 16-18; Pearce 1993: 22). In the context of this report, we listed a series of common research questions on how destination authorities responded to the increasing number of Chinese tourists in their jurisdictions. Conceptually, we tap into a number of tourism studies concepts, such as destination branding, tourist perception, cultural complexity and authenticity, to evaluate and compare the lessons. And finally, we situate and contextualise the different actions and strategies in the various destinations, so as to find lessons that are relevant to the circumstances.

Empirically, we collected official and public documents and information gathered by interpretive analysis of media contents. More information on our methodology is found in Appendix C.

2. Covid-19 resilient tourism:
Future Chinese visitor markets in context

The world will learn to live with Covid-19. As we manage the virus, the travel industry will eventually reopen albeit with caution and slowly. According to the Economist Intelligence Unit, the China outbound market will only return to pre-pandemic levels in early 2024 (EIU 2021).

Still a relatively untapped market to Tasmania

Based on the latest publicly available numbers, according to the World Tourism Organisation, China's international tourism expenditure increased from USD72 billion in 2011 to USD 255 billion in 2019. In comparison, the USA, one of the biggest sources of visitors to Australia, contributed only USD135 billion to the international tourism market in 2019. The outbound tourism expenditure for the whole world was USD 1,393 billion that year; China made up 18.3% of international tourism expenditure in the world.

There were 150 million international departures from China in 2018 and approximately 155 million in 2019 (Statista 2020). It was only 70 million in 2011 (WTO 2021). Australia received 1.3 million Chinese visitors in 2018, Tasmania receiving 52 thousand, a 37% increase from the previous year (Tourism Tasmania 2018). There was, however, a dip to 42,700 Chinese visitors in 2019 in Tasmania, but China remained Tasmania's biggest international market that year (Tourism Tasmania 2020b). With less than one percent share of the China outbound market, the China market remains relatively untapped in Australia and Tasmania. Singapore – twice the size of Bruny island - received 3.4 million Chinese visitors in the same period.

Chinese perception of Australia

There is a concern that the diplomatic relations between Australia and China are deteriorating. Will that affect the number of Chinese visitors? This is a moot question but there are also promising signs. Besides starting from a relatively low base in the sense that the Chinese outbound tourist market is untapped, Australia remains a relatively attractive destination.

During the pandemic, the Chinese public perception of Australia did deteriorate. Out of 100 points, it dropped from 65.3 in 2020 to 55.6 in 2021, according to the *Global Times* poll (Chen et al. 2021). Regardless, 87.5% of Chinese saw Australia as an economic partner rather than a military threat (12.5%). To the respondents, the souring official relations between the two countries were largely due to Australia's close alignment to US interests (45.6%) and ideological differences between the two countries (35.4%).

In the same poll of more than 2067 respondents, Australia was the fourth most popular destination for the respondents (out of 12) in 2021, down from the second place in the 2020 poll (Hu 2020; Jenkins 2021). The survey also indicated that the lower the income and educational level, the stronger the degree of negativity the respondents expressed towards Australia (Jenkins 2021). This could mean that the higher yield Chinese tourist market that Australia and Tasmania are focusing on is less affected by the negative publicity towards Australia.

Furthermore, if US-China relation improves, the perception of Australia will also become more positive.

Into the pandemic-normalised future

As mentioned above, the Economist Intelligence Unit projects that the China outbound market will return to pre-pandemic level in early 2024 (EIU 2021). Forecasting however has its perils. In the context of the Chinese outbound tourist market, there are many health, economic and political factors to consider, for instance: the Chinese authorities' can change their tolerance for the presence of Covid-19 in the community (very low tolerance now); international travels may be loosened or even tightened further (very tight now); the state of international relations is always in flux; and the Chinese economy is potentially challenged by the current falling property prices and bad debts.

Australia-China relations are currently strained. But the commodities that Australia sell, and the need for Australia's support for China membership into the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) offer opportunities for warmer relations. Optimistically, relations between the two countries will eventually improve, and to many Chinese, they are focused on Australia as an economic partner rather than a political adversary.

It is becoming apparent that Chinese tourists will be drawn to countries that they see as safe, those destinations that recognise Chinese vaccines and those who offer an easy visa application. Many of the lessons and experiences on attracting Chinese visitors during the pre-pandemic period remain relevant. Like in many places in the world, there will be a pent-up demand for international travel. Tasmania and Australia should be prepared. The benefits from the China outbound tourist market can surpass the pre-pandemic level.

3. Results and Lessons

The Covid-19 pandemic has affected the global tourism markets. Even before the Covid-19 pandemic, the reports on the different destinations indicate the importance of the China outbound tourism market for the future. As the Chinese economy grows, there will be more and more Chinese visitors. The nearer-haul destinations, such as Singapore, Malaysia and Cambodia are more matured in catering to the Chinese. Much of the potential of the Chinese tourist market remains untapped. Australia and Tasmania, as relatively longer-haul destinations with a solid reputation for good products and educational opportunities, are in a good place to attract more Chinese visitors.

Furthermore, the pandemic is largely under control in China. As travel recovery occurs, China is likely to be a target market for Australian tourism. Reflecting pent-up tourism demand, domestic tourism has prospered in many parts of the world, including Australia and Tasmania (Tourism Tasmania 2021). With the eventual easing of diplomatic tensions, we expect a surge of Chinese visitors when borders open.

Looking beyond the pandemic, the potential of the Chinese outbound market is widely appreciated in Australia and elsewhere. Almost all destinations were/are getting themselves to be more China-ready. Our comparative study offers four interrelated lessons.

Basic home-away-from-home strategy

The essential strategy is to ensure that Chinese visitors can travel in a comfortable and seamless manner, whether it is before or living with the pandemic. That means catering to their everyday habits and norms, such as lowering communication barriers (use Chinese signs and provide Mandarin-speaking guides), allow them to make payments through their everyday channels (accept China Union cards, AliPay and WeChat Pay in shops), provide access to the Internet (Wi-Fi and roaming data), serve hot water, use red and gold colours in packaging and offer food that they are familiar with. These are considered essential, and many destination management organisations and businesses are cognizant of them. These recommendations are widely touted by the World Tourism Organisation (WTO and China Tourism Academy 2020) and the Australia-China Business Council (2021).

Must haves: Essential selling points

Making Chinese visitors comfortable and reducing their anxiety are essential to assisting them have a good tourist experience. Destinations around the world, including Tasmania, are now helping Chinese visitors to feel at home, by fitting into their daily habits and practices, such as accepting Chinese payment systems and using the Chinese language.

However, it is important not to over-culturalise the Chinese visitor. In a fast-changing China, the collective mindset of the Chinese must be re-situated. Many Chinese visitors travel around in groups, partly because of costs and partly because they feel more secure in a group. And often there will be at least one (younger) group member who can act as their interpreter (see Ma et al 2019, Ooi 2019). It is predicted that there will be more solo-independent travellers from China, as more Chinese feel confident enough to do so (Moss 2021).

It is also correct that Chinese visitors do not go to a destination just to speak their own language, pay bills in their usual ways, surf the Internet, eat Chinese food, and experience what they normally do in their own everyday life (see later points). But serving the essential needs of the visitors are important in making their experiences seamless. These are essential selling points. Anxiety and uncertainty discourage people from visiting a place.

Global attractions with Chinese characteristics

There is another variation to the basic home-away-from-home strategy, and it refers to the range of activities that many Chinese visitors enjoy, whether they are at home or traveling. Mountain-bike tourism, for instance, has attracted enthusiasts from around the world to Tasmania. That activity is available in the home countries of many visitors even though the experience will be different. There are a number of 'non-distinctive' activities popular with the Chinese, including gaming and shopping. Most notably, Chinese investors have built many casinos in Cambodia, catered mainly to the Chinese market. And big cities such as Sydney, Melbourne, and Singapore are popular with many Chinese visitors because they offer a wide range of shopping possibilities. These activities are not unique but are attractive precisely because they are already familiar with them. The Australia-China Business Council (2020) for instance recommends simplifying the Tourist Refund Scheme to tap into the shopping potential.

Familiar products are big draws

Visitors are also drawn to familiar attractions – e.g., museums, shopping, and theme parks – that are found in many other places.

Work and family are "attractions" that bring visitors to a destination.

Tourism in bigger cities such as Brisbane, Sydney and Melbourne also benefit from their educational sector. Chinese come to visit their family and friends studying there. The students can also act as guides for their visitors. Another industry cross-over is the meeting, incentives, congress, and exhibition (MICE) tourism sector. The MICE tourism market is closely linked to businesses and events. Visitors come because these activities are part of their business and work. Business cities, usually the bigger ones like Singapore, benefit from this cross-over.

Making local attractions accessible

Chinese visitors, like other visitors, enjoy doing different things. Even though they want to be in a familiar environment, they also want to experience the local. They seek different experiences in a comfortable and secure manner. Tasmanian seafood is popular, and it does not have to be cooked in a Chinese manner. Fish and chips and seafood chowder attract many Chinese visitors. This does not mean that they are not interested in Chinese food and restaurants. Often, they try both what they are very familiar with and also food that is different.

How can visitors appreciate local cultures and practices when these visitors do not have the local knowledge? How do they know what is worthy of trying and doing? And should they appreciate items that they have no idea of what they are for? (Ooi 2020). Mediators play an extremely important role in bringing the familiar and the different together. For example, the rich and layered convict history of Port Arthur may be well known to many Australians but not so to many Chinese (and other foreign) visitors. Without guidance and mediation, the distinctive and unique Tasmanian stories will not be appreciated by visitors.

Local distinctiveness and the importance of mediation

Distinctiveness must be interpreted for Chinese visitors so that they can make sense of them.

A meaningful product for Chinese visitors requires balancing between what is distinctive to Tasmania and what isrecognisable. .

Mediators also endorse places (e.g., influencers), give content to visitors to interpret the place and make distinct places seem familiar.

Mediators alleviate anxiety and provide 'gaze lenses' (Ooi 2020) to help shape the experience of a site. Based on experiences around the world, we propose three mediation strategies for Chinese visitors.

Mediation 1. Identify, engage and mobilise influencers. Various destination authorities, for instance have recruited social media influencers and celebrities to promote their destination. Tasmania has benefitted from President Xi's visit in 2014. It is impossible to find an influencer in China who is more significant. Many destinations have deployed influencers or celebrity ambassadors to promote their places. While outsiders may not be aware of local attractions and stories, these mediators provide the stamp-of-approval and endorse these attractions, stories, and destinations.

Mediation 2. Activate contents tourism by generating curated materials to spur Chinese visitors towards particular Tasmanian and Australian experiences. The term 'contents tourism' refers to travel behaviour motivated by narratives, characters, locations, and other creative elements of popular culture forms such as movies, television shows, cartoons, novels, and computer games (Yamamura and Seaton 2020). Increasingly, destinations have aimed to create a market for these destinations, e.g., the Singapore Tourism Board actively canvassed for the production of the movie, *Crazy Rich Asians*, with the aim of curating new storylines for visitors to explore Singapore. Destinations are set as the props that allow visitors to experience their fantasies, imagination, and curiosity.

Mediation 3. Weave in references to China when helping Chinese visitors understand local attractions. Local attractions remain rather abstract to visitors and references to Chinese sites, historical figures or practices will engage these Chinese visitors cognitively and allow them to link their visitor experience to what they already know, do, and value.

Future of Chinese tourism

As mentioned earlier, the China outbound market is predicted to return to pre-pandemic level in early 2024 (EIU 2021). Time will tell if this prediction comes true.

When things turn around, Chinese tourists will be drawn to countries that they see as safe, those destinations that recognise Chinese vaccines and those who offer an easy visa application. Many of the lessons and experiences on attracting Chinese visitors during the pre-pandemic period remain relevant. Like in many places in the world, there will be a pent-up demand for international travels. Tasmania and Australia should be prepared.

At this lull moment, it is time to engage with local communities and tourism businesses in addressing opportunities, concerns, and strategies to draw in more Chinese visitors, and also help these visitors engage with residents and the destination more meaningfully and appropriately.

Time to engage

All countries and regions are concerned with the growing number of Chinese visitors before the pandemic. They all have also benefited from their visits

Honest engagement with local communities and industry on trade-offs is necessary.

Information and education for Chinese visitors on engaging with residents in a more meaningful manner would be useful, e.g., understanding roadkill, our clean water.

Appendix A: Destination Reports

These destination reports were produced by the respective experts. In order to draw comparisons, the experts were asked to respond to these questions:

Theme 1: Service and reactions towards tourists from China	
1a	How different destinations attract diverse Chinese tourists and what are the main success factors in each destination?
1b	How various businesses cater to the needs of Chinese tourists, and what are their successes and failures?
1c	How sentiments towards Chinese tourists are managed (or not managed) in different destinations?
Theme 2: Leveraging positive experiences and perceptions	
2a	How different states and countries have successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies?
2b	How different states and countries have successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies?

Appendix B summarises the comparison of the destination reports.

Each destination has its own context and circumstances, and each expert inevitably focuses on the most salient issues that face their destination. We respect that and celebrate the differences not only in substance but also in style and presentation.

Each report can be read independently. They come in this order.

- Appendix A1. Cambodia
- Appendix A2. Malaysia
- Appendix A3. Singapore
- Appendix A4. New South Wales
- Appendix A5. Queensland
- Appendix A6. Tasmania
- Appendix A7. Victoria
- Appendix A8. Western Australia

Appendix A1. Cambodia

Professor Heidi Dahles

Introduction:

a. Overview of tourism in the destination

In Cambodia, tourism is exceedingly dependent on a few key destination areas, in particular the capital city of Phnom Penh, the seaside town of Sihanoukville with its soaring casino industry and, most importantly, Siem Reap, the gateway to the famous temple complex of Angkor Wat. Poor infrastructure, a dominance of foreign operators and severe impediments for local people to access tourism jobs and start tourism-based businesses account for the lack of a more diverse tourism product (Mao et al. 2013: 120). Nevertheless, government strategic plans and policy papers recognize the importance to implement innovations and diversification, including ecotourism (MoT 2012). New initiatives have gained urgency due to the impact of the Covid-19 pandemic that – by mid-2021 – had virtually shut down Cambodia's tourism industry.

b. Tourism numbers, Chinese tourism numbers, projection

International tourism in pre-Covid Cambodia shows consistent growth since the early 2000s. Between 2000 and 2017 tourist numbers surged from 450,000 to 5.6 million in 2017, with an average annual growth rate of 16 per cent (WTTC 2018: 1). Before the pandemic hit, international tourist arrivals were expected to grow by 5.2 per cent per annum to about 8 million in 2028 (WTTC: 1). In 2017, the total contribution of tourism to the Cambodian economy was USD 7.2 billion, or 32.4 per cent of GDP, and was forecast to rise by 6 per cent per annum to 13 billion, or 28.3 per cent of GDP, in 2028 (WTTC, 2018: 1). The majority of international visitors (3.8 million of the total of 5.6 million) were from Asian countries with the Chinese topping the list of arrivals (PPP 2018j). Cambodia welcomed some two million Chinese tourists in 2018, up more than 70 per cent on the previous year (PPP 2019b). According to Cambodian Tourism Minister Thong Khon the country was expected to attract three million Chinese tourists in 2020 and five million in 2025 (Xinhua 2019).

c. Official and industry emphasis on Chinese tourism in relation to others

In 2015 a strategic marketing plan was launched by the government to woo more Chinese tourists, and the quality of tourism services is to be enhanced through the China-Ready Accreditation System. (PPP 2019e). The China Ready program, first launched in May 2016, aimed to foster trust between local tourism businesses and Chinese tourists (PPP 2017a). Cambodia was campaigning to attract more Chinese and one of the tools happened to be a China-Cambodia Cultural and Tourism Year in 2019 (TTR Weekly 2019).

d. Broad understanding of what matters to Chinese tourists

There are basically two types of Chinese visitors in Cambodia: big-package tour groups spilling out of coach buses for sightseeing, shopping and selfies, and small groups of self-organised tourists, mostly younger, English-speaking, and more interested in the local culture and cuisine. However, a third group is currently evolving but still marginal (PPP 2019h): the customised tour group which caters to higher-income Chinese tourists (PPP 2017c: 6). Cambodia needs to be better prepared to attract and accommodate this new type of Chinese tourist, as the Germany-based China Outbound Tourism Research Institute (Cotri) is arguing (PPP 2019f).

e. Other important context

Strengthening Cambodia-China ties have seen the latter's influence sweep across the Kingdom through increased investments and tourism. China has become the leading source of foreign funds in Cambodia, fuelling the construction sector with huge casino and hotel projects (PPP 2018h). Tourist arrivals from China have spawned a vast increase in Chinese investment. However, the benefits to the economy have been lopsided, with the majority of new jobs going to staff that the Chinese fly in themselves (PPP 2018b). Consequently, Cambodia's revenue leakage to overseas agents and investors, estimated at 40 per cent in 2017, is one of the highest in Asia (World Bank Group, 2017: 52), leaving the sector exposed to fluctuations in international tourist arrivals as the dramatic collapse of the industry caused by the Covid-19 pandemic exemplifies.

Chinese investment in Cambodia's real estate market is almost exclusively aimed at the Cambodian upper class, as well as Chinese tourists and businessmen. This is driving market prices up, making housing unaffordable for most Cambodians. Chinese investment is also transforming Sihanoukville, once Cambodia's premier seaside resort, into a bustling casino town. The unprecedented surge in Chinese tourists and casino development in Sihanoukville is benefitting a small group Cambodia's rich elite, but many other Cambodians are being driven out of the area by the skyrocketing cost of living (East Asia Forum 2018). Despite the economic potential of hotels, casinos and increased tourism numbers, Cambodia's gambling industry has long maintained a murky reputation, with the coastal destination of Sihanoukville rarely earning positive headlines. Money laundering, illegal casino operations and human trafficking have become acute concerns (PPP 2017b).

Catering to Chinese visitors

a. Success factors

Speaking at the inaugural Cambodia-China tourism forum in Phnom Penh, under the theme of "Embracing the Opportunity of Tourism Development on the Silk Road", Thong Khon, Cambodian's tourism minister, said that Cambodia, like most countries in the world, has turned to focus on the potential of Chinese visitors (PPP 2018f). So, what is Cambodia doing to charm Chinese tourists? The measures discussed below originate from the China Ready initiative which is supported by CHINA READY®, a Chinese government and industry-endorsed service (PPP 2019n).

First, the accessibility of Cambodia's key attractions is improved by building new airports (such as in Phnom Penh and Sihanoukville) and increasing the number of flights from more locations in China (PPP 2018a). The Kingdom's three international airports experienced solid growth in passenger traffic due to a strong influx from China (PPP 2018g).

Second, the China Ready initiative strongly promotes the use of the Chinese language. Hence there is a growing demand for Chinese language skills from companies looking to hire in Cambodia's job market (PPP 2017c). This impacts Cambodian travel agencies and guiding services which come ill-prepared. Chinese tour groups usually bring their own guide from China. However, recently, *Guide Direk*, the Kingdom's first tour guide booking app, was launched to assist Chinese independent travellers to book a guided tour (PPP 2019k). The impact of the growing number of Chinese tourists is also visible in the streets of Cambodian tourist areas where the signage at places of interest, shops and restaurants is more and more often provided in Chinese – causing local antagonism (PPP 2019l). China's rapid rise in the Kingdom has shaken up the traditional Chinese-language media scene as a new crop of digital competitors are taking advantage of this new opportunity (PPP 2018e).

Third, among other measures to facilitate Chinese tourists are improved in-land connectivity together with clean and green campaigns to further attract and diversify tourist destinations beyond the Angkor temple complex. The China Ready initiative also facilitates easy access to visa processing, encourages local use of the Chinese yuan, and ensures that food and accommodation facilities are suited to Chinese tastes (PPP 2019n).

b. Catering to Chinese tourists' needs

Chinese investments in Cambodia are soaring, especially in Sihanoukville province. These investments include Chinese tour agencies enter the Kingdom, new hotel and entertainment industries being established and large-scale projects such as airports and dams being undertaken (PPP 2018c). While investment capital in Cambodia's construction sector showed a nearly 20 per cent decline in 2018, industry insiders expect that the sector is now reaching a new chapter with the influx of Chinese people, which is providing impetus to Cambodia's real estate sector to grow virtually nationwide. Sihanoukville province is currently experiencing high growth, and this is expected to impact other coastal provinces (PPP 2019a).

The big winner so far is undisputedly the casino industry. The performance of Hong Kong-listed NagaCorp Ltd which operates the NagaWorld gaming and hotel complex in Phnom Penh, was boosted by the boom in arrivals from China. VIP gaming revenue totalled USD625.3 million, more than double the revenue brought in from mass market gambling, which came out to USD300.6 million (PPP 2018d: 38). The NagaWorld Complex is changing the face of Phnom Penh. The complex, comprising of Naga 1 and Naga 2, is connected via an underground shopping mall known as the NagaCity Walk. Currently, NagaCorp is planning Naga 3, a development the size of Marina Bay Sands in Singapore in order to attract high-rolling Chinese gamblers (This Week in Asia 2019).

While gambling establishments and shopping precincts absorb the big-package tour groups from China, new tourist facilities are being designed to cater to higher-income Chinese. The USD500.4 million Tourism, Ecological, Marine, and International (TEMI) tourism project has recently been approved by the Council for the Development of Cambodia (CDC). The project is part of Chinese-owned Union City Development Group Co Ltd.'s (UDG) Dara Sakor Tourism Resort project and comprises a five-star hotel with 800 rooms, a commercial centre, a golf course, bungalows, villas, amusement parks, and a naval park among other attractions. The project is located in the coastal province of Koh Kong (between Sihanoukville and the Thai border) and is set to create more than 5,000 jobs (PPP 2019c).

c. Managing local sentiments towards Chinese tourists

How do Cambodians perceive the huge influx of Chinese tourists and the consequential social and economic transformations? For one, it is acknowledged in the media that Chinese tourism generates two major opportunities for Cambodia – new jobs and income for the national economy. However, there are negative impacts abound which are particularly felt by poor Cambodians. The influx of Chinese nationals over the last few years has been a hot topic of discussions among locals for its positive and negative aspects.

Chinese tourists prefer to gather wherever they go and open their own Chinese-owned and operated businesses services, like restaurants and hotels. Consequently, tourism-generated profits are returned to the Chinese who invest in those services and, partially, to China, aggravating the leakage of tourism income. The influx of Chinese tourists and, in their wake, Chinese businesspeople, drive up real estate prices that make it unaffordable for Cambodians to buy or rent properties (PPP 2018j).

Cambodia is rife with ongoing land disputes. Long-standing and recently emerging land disputes with Chinese-owned companies and developers remain unresolved by state institutions and desperate villagers resume to petitions delivered directly to the prime minister or even the US embassy. Overall, state institutions fail to manage conflicts flaring up between locals and Chinese businesspeople and tourists. The enforcement of regulations by government bodies is poor (PPP 2018c).

Informal businesses owned by Chinese nationals are on the rise in Phnom Penh. The Cambodian government has ruled out a ban on 'foreigners' running small businesses that could affect the livelihoods of Cambodians as proposed earlier. The prime minister himself has vowed to protect the interests of all Chinese companies in Cambodia (PPP 2018i). However, locals say that Chinese tourists only go to Chinese-owned shops which, consequently, will benefit most from the recent government ruling (This Week in Asia 2019).

For much of the current sentiment against the Chinese, Sihanoukville is a case in point. The number of Chinese tourists visiting this coastal destination, a city of 90,000, hit 120,000 in 2017. Restaurants, banks, landlords, pawnshops, duty-free stores, supermarkets, and hotels all display signs in Chinese. But except for those working in the hotels and casinos, most Cambodians are seeing little benefit from this investment. Resentment is mounting (Washington Post 2018). In June 2019, a building under construction collapsed in Sihanoukville. Cambodian construction workers were among the casualties and, months later, their families are still waiting for the promised financial settlement. For many Cambodians, this catastrophe and its aftermath were confirmation that their government cared more about courting Chinese investment than it did about them (Los Angeles Times 2019). The provincial government, in an attempt to diffuse rising anger, has launched plans to attract a new type of Chinese investor which could restore the image of Sihanoukville as a tourist city and shift investment away from casinos (PPP 2019m). In anticipation of the envisioned effects, the government ordered journalists to present the hive of Chinese investment as 'a city of miracles' set to emulate Silicon Valley, Las Vegas, and Singapore (Cambodia Daily 2019).

Strategizing on Chinese tourism

a. Leveraging Chinese tourist experiences

Cambodia's vision is to become an upper-middle income country by 2030 (PPP 2018k). For this vision to materialize, the Kingdom's participation in the Belt and Road Initiative (BRI) is of critical importance. Cambodia has embraced the BRI since its inception in 2013. China has undeniably become Cambodia's most important economic partner. China is Cambodia's largest foreign investor, bilateral donor, trading partner, rice buyer and source of foreign tourists. From infrastructure and connectivity development to cross-border trade and tourism, Cambodia has benefitted significantly from cooperation with China under the BRI framework (East Asia Forum 2019).

Cambodia's vision of prosperity also entails a shift away from its overreliance on low-paid and low-skilled jobs currently provided by the (Chinese-owned) garment sector. Tourism is envisaged to become the central pillar of the country's economy. Currently, tourism in Cambodia shows stagnation in terms of value captured per tourist - from USD585 in 2005 to USD655 in 2016 –, while low-end businesses have mushroomed, stays remained short with limited repeat visits, and overcrowding and degradation of the destinations are showing (World Bank Group 2017).

The China Ready initiative is poised to change all that. This initiative represents Cambodia's effort to capitalize on the rapid growth in Chinese inbound tourism. Cambodia has established the China Ready Center (CRC) to cater to roughly 3 million Chinese tourists (upgraded from the original aim of 2 million) expected to visit the country per year by 2020, as well as to improve the skills of local tourist operators working with Chinese clients (China.org.cn 2016; Khmer Times 2016). The government is calling for the establishment of tourism institutes and universities to provide relevant skills in compliance with ASEAN standards to train Chinese speaking staff in the tourism industry and more Chinese speaking tour guides to respond to the growth of Chinese tourists (PPP 2019g). To further boost the tourism sector, the Prime Minister requested China's cooperation on human resource development by collaborating with the Royal Academy of Cambodia and a number of relevant ministries (PPP 2019i).

b. Charm offensive strategies

The Cambodian government depicts China as a big old friend, a friendship that goes back a long time in history and one that has survived many regime changes. Recently, amidst growing tensions with the West, Cambodia's already warm relations with China has reached new heights. After a recent three-day visit to Beijing, the Prime Minister announced that China has pledged almost USD600 million in aid to Cambodia (The ASEAN Post 2019).

The pre-pandemic surge in tourist arrivals is a consequence of the intensifying entanglement of Cambodia's fate with China. The Chinese government has a degree of leverage over its tourists that other governments do not enjoy. The most rudimentary Chinese lever for rewarding other governments with increased Chinese tourist numbers is to grant countries 'Approved Destination Status'. This allows group tourism to that country and can increase the number of Chinese tourists by an average of 50 per cent. Since the Chinese government has stronger regulatory power over tour agencies than most governments, it can also seek to influence foreign behaviour by curtailing such tours. China's three largest licensed tourist agencies by revenue are all state-owned and only 8 per cent of its 25,000 licensed travel agencies are authorised to offer international travel. Foreign agencies are not permitted to provide outward bound travel services for Chinese nationals (East Asia Forum 2019). In a move to tighten control over its nationals, Chinese authorities and tech giant

Huawei have agreed to assist the provincial government to install and maintain a network of surveillance cameras along major boulevards in Sihanoukville (PPP 2019d).

The benefits from being among China's most favoured nations are obvious. Cambodia receives substantial Chinese economic and military aid along with burgeoning investments. As in all other friendships that China pursues across the world, access to cheap labour, markets and natural resources is paramount. As Chinese labour becomes more expensive and workers become more vocal, Cambodia's cheap and controlled labour force provides an escape route for Chinese state-owned companies seeking to outsource their production processes to low-cost countries. China's participation in Cambodia's garment manufacturing brokers access to markets that ordinarily restrict direct imports from China. Allegations have been made that, in the current US-China trade war, Chinese companies are using Chinese-owned special economic zones in Cambodia to export goods to the US and avoid tariffs on Chinese imports (PPP 2019j). However, Cambodia's true value is of a geo-political nature. Cambodia is important to secure China's military access to the Gulf of Thailand and the South China Sea. Rumour has it that the Kingdom may be planning to host Chinese military assets at one of its naval bases in Sihanoukville, a rumour that has met with stern denial by the Cambodian government (ABC 2019).

The impact of the Covid-19 pandemic on Chinese tourism in Cambodia

The global economic downturn triggered by the pandemic has hit Cambodia's economy hard. Early July 2021 the county recorded 59,000 Covid-19 cases and 825 fatalities (PPP 2021c). Due to travel restrictions, closures of tourist resorts, interprovincial travel bans, and lockdowns, Cambodia's tourism and hospitality sector has collapsed. As recent data released by the Cambodian Ministry of Tourism reveal, international tourist arrivals had declined by 74 per cent to 1.2 million between January and September 2020 from 4.8 million in the same period in 2019 (PPP 2020) and again by 94 per cent to just over 70,000 in the first quarter of 2021 (The Star 2021). Thai visitors topped the chart at 35,294 (down 76.9 per cent year-on-year), dethroning the long-time leading Chinese to second position, with only 23,837 tourist arrivals (down 90.8 per cent). This unprecedented decline was exacerbated by a total travel ban to and from Sihanoukville, the major business and holiday destination for Chinese visitors in Cambodia. All in all, the Cambodian tourism sector made a loss of $5 billion in revenue in 2020 (PPP 2021a).

Until March 2021, over 3,000 hospitality businesses have closed down, the majority of them in Siem Reap, and a substantial portion of the 750,000 jobs in the industry were lost (PPP 2021a). The government offered financial support to individuals who were laid off and tax exemptions to hotels, guesthouses, restaurants, and travel agents. Little is known about how this downturn is affecting local communities, small tourism-based businesses and Cambodians who lost their jobs. However, domestic tourism has witnessed a marked rebound after the government on April 25 lifted the inter-provincial travel ban and ended the closure of tourist destinations across the country, except for resorts in locked down provinces. According to tourism minister Thong Khon, 346,518 domestic trips were made across the Kingdom in June 2021, up 78.58 per cent month-on-month but down by 43.4 per cent year-on-year (PPP 2021b).

On the heels of this, the government – eager to reopen the country for international travel in the fourth quarter of 2021 - launched a five-year tourism roadmap to revive the sector. Few details of this roadmap have been revealed so far, but it is expected that it resonates with the recently launched special tourism zoning plan designed to attract long-stay and repeat visitors and to advance property purchase in Cambodia. Tailor-made for Chinese visitors, this development is expected to resolve many challenges, including containing the spread of Covid-19 (PPP 2020).

Summary Table

Questions	Destination: Cambodia
RQ1a Successful strategies	The China Ready Initiative: • Improved accessibility of Cambodia's key attractions (new airports, increased number of flights to more locations in China). • Use of Chinese language (signage, tour guides). • Improved in-land connectivity. • Clean and green campaigns. • Usage of the Chinese currency. • Easy access to visa processing. • Restaurants and shops catering to Chinese tastes.
RQ1b Serving the specific needs of Chinese visitors	• Expansion of infrastructure (roads, hotels, real estate). • More and bigger casinos. • More and bigger shopping malls. • Incipient luxury resort development to cater for rich Chinese tourists.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• Failure to enforce regulations. • Issue regulations that benefit Chinese nationals over Cambodians. • Half-hearted measures to reduce impact of casino tourism. • Tell journalists to report positive stuff.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	The China Ready Initiative is poised to enhance: • Chinese language skills among Cambodians. • The quality of training and education in the tourism and hospitality sector. • the quality of human resources.
RQ2b How tourism is used to affirm bilateral ties	• The recent surge in tourist arrivals is a consequence of the long-standing and further intensifying entanglement of Cambodia's fate with China.

Appendix A2. Malaysia

Long Fei

1. Introduction

In 2019, about 155 million of international departures were made by Chinese tourists (Statista 2020). Moreover, it is predicted that the number will grow to 259 million by 2030 (SCMP 2018). Considering the current and future size of the market, almost all the national tourism organizations are taking initiatives to attract Chinese tourists (Arlt 2013).

T&T plays an important role in the economic development of Malaysia. In 2019, T&T made up 15.9% of the national economy compared with 10.4% in 2005, and 23.6% of jobs are related to the industry (DOSM 2020; WTTC 2018). There were 26.10 million international tourist arrivals in 2019, and China (3.11 million) was the 3rd largest source market following Singapore (10.16 million) and Indonesia (3.62 million) (Tourism Malaysia 2020).

Since receiving China Approved Destination Status (ADS) status in 1990, Malaysia has been a favourite destination for Chinese tourists. The Ministry of Tourism, Arts and Culture Malaysia aims to attract more Chinese tourists. As 2020 will be *Visit Malaysia Year* and *Malaysia-China Cultural Tourism Year*, a series of promotional campaigns are being conducted. Thus, the ministry has set a target of receiving 5 million Chinese tourists in 2020 (Sin Chew Daily 2019a).

However, Malaysia's T&T has been seriously disrupted by the Covid-19 pandemic. It saw an 83.4% drop in tourist arrivals, and less than 0.41 million Chinese tourists visited Malaysia in 2020 (Tourism Malaysia 2020). Nevertheless, it is believed that Chinese tourists will lead the way once Malaysia reopens its border (The Star 2020). Why has Malaysia remained as a popular destination for Chinese tourists in the last few decades? To identify the key factors, the present report refers to media coverage, government documents and academic research. The collected news articles are mainly from Malaysia's mainstream media.

2. The Success Story of Malaysia

Malaysia is the 1st ASEAN country to establish diplomatic ties with China. In the past 45 and foreseeable coming years, the two countries generally have amicable relations, especially in economic areas (Yeoh et al. 2018). The stable diplomatic relations set a solid foundation for Malaysia's tourism regarding the Chinese market. On the contrary, a soured relations would bring negative impacts. For example, Chinese tourist arrivals plunged by an estimated 30%-35% during China's National Day holiday in 2018, compared with the same period of previous year, which is allegedly related to controversial comments of Malaysian politicians and cancellation of a few China-linked mega projects in Malaysia (The Strait Times 2018).

Fortunately, diplomatic relations were fixed before it could substantially hurt Malaysia's inbound tourism. Malaysian Prime Minister, Dr. Mahathir bin Mohamad, went to Beijing to participate in Belt and Road Forum for International Cooperation in April 2019, and he publicly stated his 'full support' on the Belt and Road Initiative (SCMP 2019a). Then, the bilateral economic cooperation was further enhanced, and Malaysia's trade with China even grew by 4.2% in 2020 compared to that of 2019 regardless of the adverse impacts of the Covid-19 (MITI 2021).

To boost tourist arrivals from China, Malaysia has relaxed its visa requirements gradually. It started to introduce eVISA in 2016, which enables Chinese tourists to apply for visa online conveniently. One year later, Malaysia introduced eNTRI, an online registration system under the Visa Waiver Programme. Besides, the Home Ministry decided to add more visa-on-arrival (VOA) facilities for tourists from China in July 2019, and the application fee is lowered from 300RM to 200 RM, but the maximum stay is extended from 7 to 15 days (The Star 2019a).

Meanwhile, industry practitioners and other stakeholders are urging the Malaysian government to waive visa for Chinese tourists. Tan Kok Liang, President of Malaysian Association of Tour & Travel Agents, expressed his concern that Malaysia is falling behind as neighbouring countries are taking more measures for visa facilitation (The Edge Markets 2019a).

Apart from visa requirements, the connectivity between China and Malaysia has been improving continuously. Take AirAsia for example, it is having more direct flights linking Malaysia and China, expanding its service to 2nd or even 3rd tier cities in China (AirAsia 2018; The Star 2018a). Concerning the payment system, both Alipay and WeChat Pay are introduced to Malaysia for facilitating Chinese tourists (NST 2019; The Edge Markets 2019b).

For historical reasons, there is a large local Chinese community who are able to communicate in Mandarin and other Chinese dialects. Meanwhile, Chinese traditions and customs are well-preserved, which gives Malaysia an advantage to appeal to Chinese tourists (Puah et al. 2018; Sin Chew Daily 2019b). Although Chinese tourists usually put uniqueness of tourist attractions, safety, and ease of visa procedure on priorities when they choose where to travel, similar language and culture do make it easier to travel in Malaysia (Nielson 2018).

In 2018, Kuala Lumpur international airport set up a Chinese Traveller Affairs Helpdesk where Mandarin-speaking volunteers provide essential information to Chinese tourists, which is the 1st of its kind in the whole of SEA (The Star 2018b). Apart from language, food culture is another factor that could make Chinese tourists feel at home (Jalis et al. 2014). Tan Kok Wai, Special Envoy to China, once proposed to organize a food festival echoing *Malaysia-China Cultural Tourism Year 2020*. He mentioned that not only could Malaysia provide a variety of local foods, but also could it present cuisines from different parts of China (Sin Chew Daily 2019).

3. A Paradox of Public Sentiments against Chinese Tourists

From media reviews it is found that unpleasant incidents happen from time to time, such as Malaysian Grab [local version of Uber] driver mocking Chinese tourists (The Star 2017). Meanwhile, 'uncivilised' behaviours are observed from Chinese tourists visiting Malaysia, which could partially explain the negative sentiments. According to an international study, roughly 43% of respondents named Chinese tourists as the worst holidaymakers in Malaysia (YouGov 2019).

Arguably, some so-called "uncivilized" behaviours result from cultural misunderstandings. Malikhao (2017) states that cultural misunderstanding is a main contributor to the tension between Chinese tourists and local residents in travel destinations. To deal with the issue, Malaysia tourism authority and other related associations are closely working with the Chinese government to provide necessary information to Chinese tourists and local residents.

On the one hand, information on Malaysian culture is provided to Chinese tourists. On the other hand, tourist attraction managers and local residents are approached to explain the logic behind some 'uncivilized' behaviour for changing their perception on Chinese tourists (Ooi 2019). Uzaidi Udanis, president of Malaysia Inbound Travel Association, suggested that tourism stakeholders should learn more about Chinese tourists to avoid misunderstandings, and they should not assume that Chinese tourists know all social norms in Malaysia.

Besides, some Malaysians may have a negative perception about Chinese tourists due to the Covid-19 pandemic, but such perception is not common in Malaysia. Meanwhile, China keeps donating vaccines to Malaysia, which could mitigate the negative perception (NST 2021).

Despite the negative sentiments – which are at a manageable level -, it seems that Malaysia is reluctant to touch another issue related to the existing sentiments, that is, institutionalized discrimination against Chinese Malaysians (Harris & Han 2019). In a research investigating whether Chinese tourists will visit Melaka, a UNESCO World Heritage City of Malaysia, the findings indicate that some tourists are concerned about discrimination (Moy & Phongpanichanan 2014). For decades, Malaysia has been implementing affirmative action on minorities. Will the situation change in the near future? How to explain the affirmative action to Chinese tourists, and make them believe that they will not be discriminated against in Malaysia? Based on collected information, Malaysia is not ready to answer these questions.

4. A Malay Saying: Tak Kenal, Maka Tak Cinta

Tourism is a good way to reduce misunderstanding among people from different cultures (Diekmann and McCabe 2011). Through traveling, people have a chance to make connections with the local residents, and vice versa. There is a Malay saying "Tak Kenal, Maka Tak Cinta". It means that you cannot love someone if you don't know the person.

If Chinese tourists develop an in-depth understanding and form a positive attitude on Malaysia, arguably the country's soft power will be increasing (Ooi 2016). According to Nye (2009: 160), "soft power is the ability to obtain preferred outcomes through attraction". In the new scenarios of international relations, soft power plays a significant role to win the hearts and minds of the global audience. More importantly, Malaysia, as a medium-sized country, is unlikely to depend on hard power (Hussin 2018). As Ooi (2016) postulates, soft power and tourism are interlinked, and happy tourists could become assets for host countries.

Towards Chinese tourists, Malaysia adopts an approach of combining cultural similarity and difference. Take gastronomy for example, Chinese cuisine is offered to make Chinese tourists feel at home; other local and international cuisines are offered to satisfy their desire for new things (Hussin 2018). What's more, Malaysia is full of exotic stories relating to China, such as the legendary Chinese 'princess' Hang Li Po and Admiral Zheng He. However, Malaysia is viewed as lack of cultural resources due to insufficient promotion to international tourists (Sudipta and Sarat 2010).

5. Increasing Malaysia's Soft Power in China through Tourism

With more initiatives being implemented to facilitate Chinese tourists, the positive image of Malaysia is enhanced for some extent. Meanwhile, Malaysia is using tourism to further improve its relations with China, especially in trade, investment, and education.

China remains Malaysia's top trading partner for 11 years, and the bilateral trade volume exceeded 100 billion USD last year (MIDA 2020). Through the lens of tourism, Chinese consumers get familiar with some Malaysian products, such as durian, white coffee, and edible bird's nest. Those who travelled to Malaysia became loyal consumers and promoters of these products. Take durian for example, it would contribute more than 120 million USD annually after China's approval for importing frozen whole durian from Malaysia (SCMP 2019).

Concerning investment, unique stories on ethnic coexistence and harmony are highlighted to Chinese investors, which shaped their perception to a desired direction by Malaysia (Ooi 2014). Under these self-promoted images and endorsement from the Chinese government, Chinese investors keep going to Malaysia. Another wave of FDI is expected to come after Malaysia "shouted out" its 'full support' to China's BRI in April (The Star 2019).

In addition, Malaysia aims to become a global higher education center by 2025, and China is identified as a key source market (Long 2019). Currently, around 15,000 Chinese students are studying in Malaysia, and those students could become a bridge to improve people-to-people connection between the two countries (Business Times 2019).

Undoubtedly, stereotypes on the local Chinese community and China are still lingering as they have been portrayed as a threat against Malay hegemony for a long time, but economic interest gradually becomes of greater concern for Malaysia (Gabriel 2015; Yow 2016). To prevent Chinese nationals perceiving traces of 'anti-Chinese' sentiments, tourism is used to send out a message that Malaysia is a Chinese friendly country where Chinese culture is preserved, and different ethnic groups live side by side.

6. Conclusion

This case study intends to address two sets of questions. Firstly, how does Malaysia serve and react towards tourists from China. Secondly, whether Malaysia effectively utilized tourism to enhance its soft power in China. Looking at the number of tourist arrivals from China and its growing trend before the Covid-19 pandemic, it is reasonable to say that Malaysia is one of the most successful countries catering to Chinese tourists.

Quite a few initiatives have been implemented to make it easier to visit Malaysia for tourists from China, such as loosened visa requirements and enhanced air connectivity. Significantly, Malaysia has moved to a deeper level of cultural understanding on Chinese tourists. Not only does it react to specific behaviours, but also start to search cultural logic to explain Chinese tourists' behaviours for managing these behaviours accordingly (Ooi 2019).

To truly understand behaviours of Chinese tourists, Chinese concepts (e.g., face, renqing, and guanxi) and China's historical events have to be comprehended thoroughly (Inglehart 1977; Johnson 2018). However, Malaysia's attempt for finding cultural logic staggers at a primary stage as the process is being held back by its own ethnic tension.

Last but not the least, Malaysia benefits from the prosperity of China's outbound tourism market, which mainly relies on the amicable bilateral relations. Although the influence of MH370 and kidnapping incidents are still lingering, the negative impact is minimized under the current situations (Habibi 2016). In addition, Chinese tourist arrivals to Malaysia may bounce back quickly as long as the pandemic is stabilized. Significantly, tourism will be the 1st area to suffer if any political conflicts happen and tarnish the Malaysia-China relations.

Summary Table

Questions	Destination [Malaysia]
RQ1a Successful strategies	• To maintain smooth political relations with China. • To organize Malaysia-China cultural tourism year in 2020, which is also supported by the Chinese government. • To simplify the visa application process. • To improve air connectivity with China, especially 2nd and 3rd tier cities.
RQ1b Serving the specific needs of Chinese visitors	• Mandarin and other Chinese dialects are widely spoken in Malaysia. • To provide Chinese language service at major transportation hubs. • To provide both localized Chinese food and cuisines from other parts of China and the world. • To close distance with Chinese tourists by telling exotic stories relating to China, such as the legendary Chinese "princess" Hang Li Po and Admiral Zheng He.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• There are 2 sources of negative sentiments. One is "uncivilized" behaviours of Chinese tourists, and another one is Malaysia's own domestic ethnic issue. • Malaysia tourism authority works with its Chinese counterparts to provide necessary information to Chinese tourists and local residents for better mutual understanding. • It seems that Malaysia doesn't want to touch its own ethnic issue.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	• Tourism enhances the positive image of Malaysia. • Many Chinese tourists become loyal supporters and promoters of Malaysian products, such as durian, and those products become a symbol of Malaysia. • Stories on ethnic coexistence keep attracting investors from China. • Tourism improves Malaysia's education image. There are more Chinese students studying in Malaysia, and more Malaysian students studying in China. Those students will become a bridge for connecting the two countries.
RQ2b How tourism is used to affirm bilateral ties	• Malaysia-China cultural tourism year is supported by both governments, which affirms the bilateral ties. • Tourism is used to assure Chinese citizens that Malaysia is a China-friendly, peaceful, and progressive country. • Tourism is used to improve people-to-people connections.

Appendix A3. Singapore

Associate Professor Sin Harng Luh
Associate Professor Ong Chin Ee

Introduction

a. Overview of tourism in the destination

A sovereign island city-state, Singapore has a base population of 5.6 million residents. This consists of both citizens (61%) and a working foreign population (39%). Tourism has grown strongly through five decades of its modern and independent existence: from a modest 99,000 in 1965 to 18.5 million in 2018 (Singapore Government Statistics 2019). Today, tourism arrivals are a key part of life and economy in Singapore, with recent tourist numbers tripling Singapore's base population. Tourism income has also been a key feature in Singapore's GDP, making up around 10% of the GDP of the city-state since 2010 (Knoema Tourism Data 2018).

Singapore's growth in tourism can be seen in Table 1. It highlights how Singapore was once a less visited island but has since become a major tourist hub. Tourism arrivals has been on a strong upward trend until international border restrictions were imposed since the Covid-19 global pandemic emerged in January 2020.

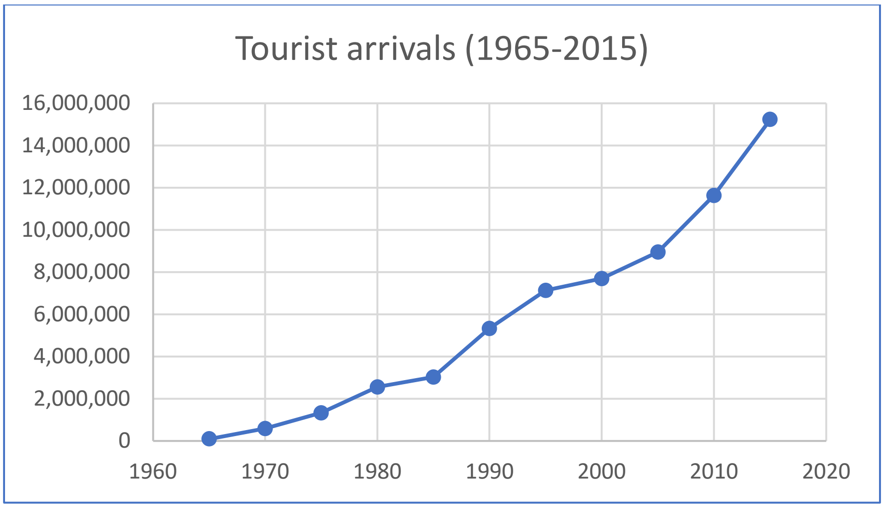
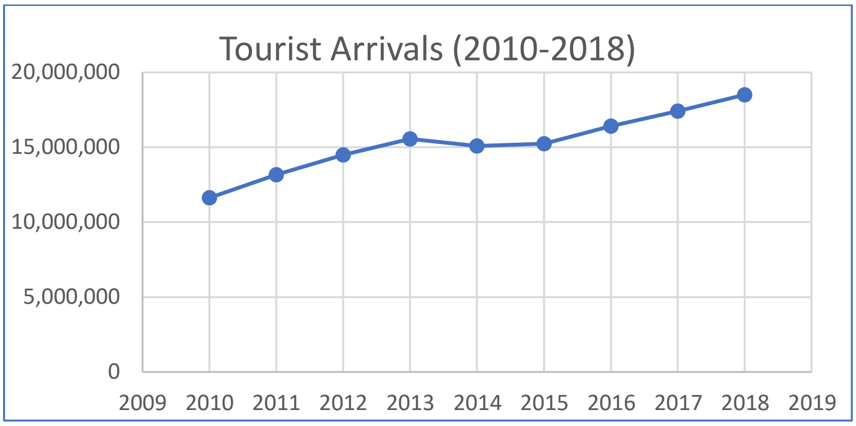


Table 1: Tourist Arrivals 1965-2015 (5-Yearly), Source: Singapore Tourism Board (2019)

In the last three decades, the island state's tourism offerings have shifted from an emphasis on more local and regional scale attractions in the 1980s (e.g. Jurong Bird Park, Chinese and Japanese Gardens, various heritage precincts) to more regional ones (eg. collaboration with Indonesia to establish Bintan Integrated Beach Resorts) to the recent 'global' ones (F1 races and the gaming-based Integrated Resorts). Such an increase in tourism offerings help augment the attractiveness of the island-state and helped Singapore achieve a much steeper climb in tourism arrivals post-1985.

In particular, the establishment of capital-intensive world-leading Integrated Resorts (Marina Bay Sands and Resorts World Sentosa), Gardens by the Bay and Singapore Flyer and the pronounced effort in attracting and hosting major events (e.g., F1 night race, marathons, ILight Singapore) have contributed to the sustained strong showing in tourism arrivals in recent years (Table 2).

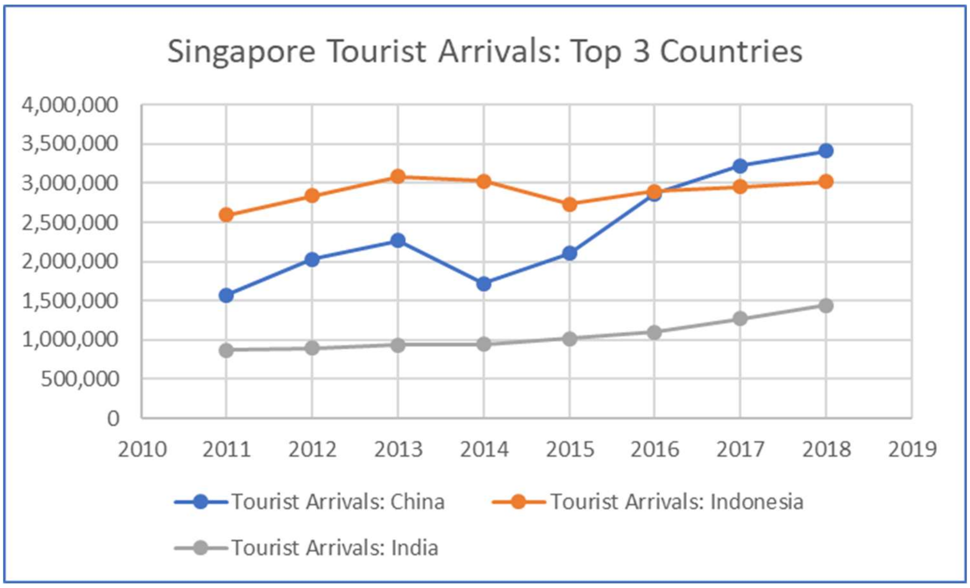
The efforts to achieve such strong tourism demands and high tourist arrivals have been built on comprehensive work beyond regular tourism attraction development and marketing. The country has also invested heavily in building tourism infrastructure – e.g., Changi Airport expansion, new cruise terminal, and revamping Sentosa island.



Tourist Arrivals 2010-2018 (Yearly), Source: Singapore Tourism Board (2019)

b. Tourism numbers, Chinese tourism numbers, projection

Table 3 shows the tourist arrivals of China, Indonesia, and India – the top three source countries in 2018 and how they performed since 2011. Most notably, year 2017 is a watershed for the competition between Indonesia and China for the top spot. China, for the first time, overtook long-time top source country Indonesia and have held on to that spot for two years running.



Tourist Arrivals: Top Three Source Countries: China, Indonesia and India, Source: Singapore Tourism Board (2019)

Despite the expectations of a slowdown in the Chinese economy, industry research in 2019 reported an average spend on tourism of USD3,623 in the last 12 months (Hotels.com survey[1]). This is more than a quarter of Chinese citizens' income at 28 per cent and an increase of 4 per cent. Reportedly, Chinese travellers also intended to spend an average of 10 per cent more on tourism over the next year.

The average daily expenditure inclusive of accommodation also increased 8 per cent from 2016 from USD414 to USD446 (SGD611). Dining, sightseeing and rest and relaxation activities proved to be most popular. There is also a noticeable shift in Chinese tourism experiences as shopping dropped from 68 per cent travellers expressing an interest in 2016 to only 33 per cent doing so in 2017. This indicates the increasing diversification of Chinese travel activity preferences towards more niche ones.

The frequency and duration of Chinese travels across all age groups have also increased, with the number of trips (three to four) and number of days per trip increasing in the past year (five to seven days). They also prefer visiting multiple cities in a trip. As high as 80 per cent reported they would not just tour a single city.

c. Official and industry emphasis on Chinese tourism in relation to others

It was widely reported across all media outlets when Chinese tourist numbers became the top source country for Singapore in 2017. This is also continually reported in almost all media articles reviewed in this paper. The importance of Chinese tourism – in terms of its actual numbers, tourism receipts, and potential for growth is heavily emphasized within in official or industry contexts.

Other major markets that receive attention include India, Indonesia, Southeast Asia, and the loosely grouped 'Halal tourism' market – including both Middle East countries and regional Muslims from Malaysia and Indonesia.

d. Broad understanding of what matters to Chinese tourists (e.g., making it easy to visit, catering to their cultural norms, pricing)

- Connectivity – the short flight time and frequency of flights and availability of tours etc. are commonly highlighted as attractive features of Singapore and Southeast Asian destinations.
- Language – there is an availability of Mandarin speakers in hotels, attractions etc. that can communicate effectively in Chinese.
- Safety – barring isolated incidents, Chinese tourists see Singapore as a very safe destination.
- Visa requirements – It is easy it is for Chinese tourists to obtain a visa to visit the country.
- Payment methods – WeChat pay and Alipay are rapidly adopted in recent years by big malls such as Suntec City and Raffles City, with outlet mall IMM even providing GST rebates.
- Attractions – Chinese tourists are stereotyped to be interested in food, shopping, beach but this is fast diversifying as Chinese tourists have reportedly sought out Pulau Ubin and traditional pastry and bakery.
- Marketing on platforms that Chinese tourists use, prefer and trust – e.g., on Alibaba or tencent platforms, using Chinese brand ambassadors – this has been widely emphasized in the reports and seen to be keyways of tapping into the Chinese travel and consumer market.

[1] Note that hotels.com survey refers to Chinese tourists in general and these statistics are not specific to Singapore as a destination.

e. Other important context (also refer to the context in the analyses of the research questions)

Singapore being 75% Chinese, having bilingual education and being recognized as "from China anyway" is perceived by Chinese travellers as a 'familiar', 'safe' and 'easy' place to travel. The recent Passion made Possible Campaign most notably employs ethnic Chinese Singaporean celebrity ambassadors (Stephanie Sun, and Nathan Hartono) to help bridge Chinese travellers and Singapore's more every day, immersive, and personal, which was identified as a realm of growing interest.

RQ 1a. Looking at how your destination attracts diverse Chinese tourists and identify the main success factors.

As one of the first destinations to obtain an Approved Destination Status (in 1990, only behind Chinese territories Macao and Hong Kong in 1983 and Thailand 1988), Singapore has had a head start in receiving Chinese travellers. The modern and clean feel of the city, its ethnic Chinese community (including the celebration of Chinese New Year) and its accessibility have been its main draw for the past decades. Specifically, there has been effort made to establish airport connections to secondary cities in China on top of the top tier ones. The middle-class tourists from 2nd tier and 3rd tier cities have been targeted to unlock China's full potential. Hence, the growth of Chinese tourism comes on the back of STB`s marketing push to sell Singapore in other parts of China and not just major cities like Beijing and Shanghai.

Industry experts also say Singapore appeals to Chinese tourists as offerings here have evolved beyond just shopping and sightseeing to giving guests a chance to learn more about Singapore`s heritage and culture. For instance, using corporates Chinese are already familiar with to gain insights into the Chinese consumer market, and also to reach the market (e.g., Alipay). A 'Singapore Passion Ambassador campaign' consisting of a group of Chinese 'ambassadors' were selected from a segment of high-tier Alipay members and sponsored to experience one of three itineraries to explore unique attractions, food and retail outlets, all of which are Alipay merchants. The itineraries were customised for three types of travellers - the foodie, collector, and explorer.

A more integrative approach has also been adopted in key dimensions. First, in attracting Chinese tourists to visit Singapore as stopover or part of broader package – e.g., typical Singapore-Malaysia-Thailand route, or as a stopover to Indonesia or Australia. Second, putting the traditional attractive features of the country together, for instance, safety in the city and diverse cultural heritage to attract Chinese travellers to come to the region (with ASEAN partners) and the island (Singapore tourism stakeholders) and stay longer. Third, STB, EDB, Changi Airport, Enterprise Singapore, tour agencies, and other stakeholders (e.g. food souvenir industry) working together 'whole of Singapore' approach.

RQ 1b. Examine how the destination management organisation or DMO and some businesses in your destination cater to the needs of Chinese tourists and evaluate their successes and failures.

Much of these focus on the use of Chinese language, understanding Chinese norms and the establishment of Chinese apps – particularly payment apps such as Alipay and WeChat pay.

For instance, hotel staff are taught Chinese etiquette and have Mandarin-speaking staff readily available. Chinese programmes are also made readily available at a number of attractions (e.g., Science Centre). Chinese restaurants/food are also easy to find.

Travel and shopping apps such as Meituan were mentioned with an intention of helping Chinese travellers feel comfortable navigating and touring Singapore. For instance, STB and Singapore retail and tourism firms have been working with Chinese corporations – e.g., Tencent (to stream Zoukout to China); Alipay and WeChat Pay. The establishment of the Chinese payment systems such as Alipay and WeChat pay allows Chinese tourists to retain payment systems they have from home. Alipay system also facilitates the creation itineraries within its platform. Fliggy system and Singapore airlines also established a mile sharing system.

There is political will within the context of ASEAN collaboration at Visit Asean@50, to grow international tourism arrivals to the region by 10%. While not explicit, much of that 10% are likely to be envisioned to be increased Chinese arrivals.

While much is done to cater to the high-tech AI that Chinese tourists are used to back in China, STB and other stakeholders have been working with travel agencies in 3rd tier cities since tourists from these places tend to use agencies.

The maintenance of a multi-year multi-entry visa also eased Chinese travel to Singapore.

RQ 1c. Investigate how sentiments towards Chinese tourists are managed (or not managed) in your destination by the DMO/peak body/businesses.

Much of the reporting focuses on the economic contribution of Chinese travellers. Less is said about how sentiments towards Chinese tourists are managed (or not managed). There are subtle hints of alignment – e.g., when Alipay was reported, there were few statements about how this is in line with Singapore's smart nation initiative. There is so mention of tourist-local tensions, but this has been largely played down. E.g., in Alipay news.

RQ 2a. Examine how your state/country has successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies.

There is a natural connection between tourism and retail development that caters to both tourists and locals. For instance, local food products launched in Changi Airport to enable food manufacturers to use tourists as a test bed for bringing products to stores overseas. Alipay, when first launched In Singapore, was seen as a means to improve and revitalise local business in Chinatown. The pairing of systems and enterprises, such as Singapore Airlines and Alibaba – Cloud, Fliggy etc. The work of Marketing Singapore also sees STB and EDB working together.

RQ 2b. Examine and evaluate how tourism is used by authorities in your state/country in their charm offensive strategies.

There is an emphasis on regional cooperation between ASEAN countries in building the region as an attractive destination to markets such as China. Singaporean singers are also making in-roads into China market and acting as tourism ambassadors.

The soft power of China and its implications are illustrated in TV feature March of the Middle Kingdom. The feature compares Southeast Asian countries' draw to Chinese tourists and suggest many links between tourism and e.g., political tension between China and Philippines, electronic visas in Malaysia, language, and communication etc. There is a risk of involving tourism when considering bilateral issues and tensions. In the media, reverse cases are more often reported – e.g., MH370 Malaysia Airlines, South Korea, Japan, and USA trade war.

Impact of Covid-19

Covid-19 profoundly impacted upon tourism in Singapore as a result of worldwide border closures and travel restrictions. Overall, visitor arrivals (VA) fell by 85.7 per cent making 2.7 million visitors in 2020 (nearly all from the January and February 2020), while tourism receipts (TR) declined by 78.4 per cent to SGD4.4 billion in the first three quarters of 2020 (STB 2021). The DMO has responded by providing and encouraging programs and products which prepare tourism providers to operate during the pandemic and in the promotion of domestic tourism. These can be seen from initiatives such as endorsing the world's first Covid-19 ready cruise (CruiseSafe Certificate) and the launch of e-vouchers for use in domestic attractions and offerings (SingapoRediscovers vouchers).

Tourism arrivals from Mainland China were severely reduced to 357,292 in 2020 (of which 329,047 arrivals were in January 2020 before China restricted outbound travel), as compared to 3,627,120 in 2019 (Singstat 2021). Although current policies have relaxed restrictions and allowed visitors from Mainland China to enter Singapore without any quarantine since November 2020[2], tourism arrivals remain low from November 2020 to May 2021 (latest available data) at 48,097 in seven months (Singstat 2021).

[2] Mainland China is deemed as a "low risk" country in Singapore's border control policies. Short term social visits and tourists from Mainland China are also allowed entry into Singapore. There are several countries on this list of low risk countries and this is routinely reviewed and revised according to prevailing pandemic situations. Arrivals from all other "high risk" countries have to do a 14 day mandatory stay home notice fulfilled in dedicated facilities. Short term social visits and tourists are not allowed from these countries.

Summary Table

Questions	Destination: Singapore
RQ1a Successful strategies	• Airport connections to secondary cities in China. • "The growth of Chinese tourism comes on the back of STB`s marketing push to sell Singapore in other parts of China and not just major cities like Beijing and Shanghai. • Industry experts also say Singapore appeals to Chinese tourists as offerings here have evolved beyond just shopping and sightseeing to giving guests a chance to learn more about Singapore`s heritage and culture." • Using corporates Chinese are already familiar with to gain insights into the Chinese consumer market, and also to reach the market (e.g., Alipay). • Creating the "Singapore Passion Ambassador campaign" – "a group of Chinese "ambassadors" will be selected from a pool of high-tier Alipay members and sponsored to experience one of three itineraries to explore unique attractions, food and retail outlets, all of which are Alipay merchants. The itineraries will be personalised for three types of travellers - the foodie, collector and explorer." • Attracting Chinese tourists to visit Singapore as stopover or part of broader package – e.g., typical Singapore-Malaysia-Thailand route, or as a stopover to Indonesia or Australia. • Targeting middle class tourists - 2nd tier and 3rd tier cities to unlock China's full potential. • Safety in the city. • Rich cultural heritage • New Asean marketing campaign has been launched to encourage more tourists to visit the region, spend more and stay longer. • Changing tourism marketing and planning strategies along with changing markets. • Food souvenir industry. • STB, EDB, Changi Airport, Enterprise Singapore, tour agencies, and other stakeholders working together "whole of Singapore" approach.
RQ1b Serving the specific needs of Chinese visitors	• Hotel staff taught Chinese etiquette. • Mandarin-speaking staff readily available. • Working with Chinese corporations – e.g., Tencent (to stream Zoukout to China); Alipay and Wechat Pay. • Alipay so Chinese tourists can still use payment systems they have from home. • Alipay: create itineraries within its platform. • Fliggy and Singapore airlines sharing miles system. • Chinese programmes at attractions (e.g., Science Centre) • Chinese restaurants/food. • Working with travel agencies in 3rd tier cities since tourists from these places tend to use agencies. • Multi-year multi-entry visa. • Catering to high-tech AI that Chinese tourists are used to back in China.

RQ1c Strategies used to manage sentiments towards Chinese visitors	• Excessive reporting on how many Chinese tourists come and how much Chinese tourists spend • Subtle hints of alignment – e.g., when Alipay was reported, there were few statements about how this is in line with Singapore's smart nation initiative. • Saying but playing down tensions between locals and Chinese tourists - e.g., in Alipay news. • Again, not an explicit strategy – but reporting survey cites Chinese academics as being critical to Chinese tourists' bad behaviours.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	• Natural connections between tourism and retail development that caters to both tourists and locals. • Local food products launched in Changi Airport to enable food manufacturers to use tourists as a test bed for bringing products to stores overseas. • Alipay seen as a means to improve and revitalise local business in Chinatown • Pairing e.g., Singapore Airlines and Alibaba – Cloud, Fliggy etc. • Marketing Singapore with STB and EDB working together
RQ2b How tourism is used to affirm bilateral ties	• Emphasis on regional cooperation between ASEAN countries in building the region as an attractive destination to markets such as China. • Singaporean celebrities expanding into China market and acting as tourism ambassadors. • Feature: March of the Middle Kingdom compares Southeast Asian countries' draw to Chinese tourists and suggest many links between tourism and e.g., political tension between China and Philippines, electronic visas in Malaysia, language, and communication etc. • Risk of involving tourism when considering bilateral issues and tensions. • Reverse cases are more often reported – e.g., MH370 Malaysia Airlines, South Korea, Japan, and USA trade war.

Appendix A4. New South Wales and Sydney

Dr Garth Lean

New South Wales (NSW) is Australia's most visited state, receiving almost one-third of total Australian visitor numbers (32%), expenditure (31%) and nights (32%) (Destination NSW 2019a). Regional NSW has the largest share of regional visitation in Australia (33%). While the international market is an important component of the NSW visitor mix, visitation is dominated by the domestic overnight (34%) and daytrip (62%) markets. Even though international visitation is only 4% of total visitation, it accounts for 27% of visitor expenditure and 46% of visitor nights (Destination NSW 2019a).

Prior to the Covid-19 global health pandemic, NSW was Australia's most visited state by people from China, and Sydney is Australia's most visited capital city. In the 12 months from July 2018 to June 2019, NSW received 57% (754,900) of all Chinese visitors to Australia, 39% (22 million) of visitor nights and 40% ($3.9 billion) of visitor expenditure (Destination NSW 2019b). China is the largest international visitor segment to NSW. In 2018/2019, 17.3% of all international visitors to the state were from China, with the USA (11.9%), New Zealand (10.1%), UK (8.2%) and Japan (4.7%) making up the top five international source markets (Destination NSW 2019c). While Chinese visitors represent less than one-fifth of total international visitors to NSW, they generate more than one-third (35.3%) of international visitor expenditure, with the USA (7.6%) and UK (5.9%) a distant second and third (Destination NSW 2019d). Sydney is the most visited region of NSW with 97% (735,000) of Chinese visitors to NSW visiting the city. Only 8% of Chinese visitors visit regional NSW. The South Coast (3%) and Hunter (2%) are the most visited regions outside of Sydney (Destination NSW 2019b).

Chinese visitation to NSW grew rapidly in the 5 years preceding the Covid-19 pandemic. From July 2014 to June 2019, the total number of Chinese visitors increased by 73.4%, visitor nights increased by 75.7% and visitor expenditure grew by 158.8% (Destination NSW 2019b). This growth greatly exceeded the state tourism authority, Destination NSW's, forecasts. Destination NSW's (2012) *China Tourism Strategy 2012–20* forecast a total of 623,000 Chinese visitors to NSW by 2020/2021, a figure 17.5% lower than what had already been reached by 2018/2019. Total expenditure by Chinese visitors in 2018/2019 ($3.9 billion) was almost twice as much as what had been forecast in 2012 for 2020/2021 ($2.1 billion). The cessation of international travel to Australia during the Covid-19 pandemic saw a 99.1% reduction in international visitors to NSW (Destination NSW 2021a). Even though international visitation contributed only a small overall percentage of total visitation to NSW prior to Covid (4%), those services, attractions and destinations catering to higher proportions of international visitation experienced considerable negative economic impacts. This was compounded by interstate and intrastate travel restrictions.

While the shortfall in international visitation was partially offset by increased domestic travel by Australian's who could no longer travel overseas, this had greater benefits for regional NSW than Sydney as domestic travellers were less inclined to travel to a highly concentrated urban centre during the pandemic. Between April 2020 and March 2021, Sydney saw a dramatic reduction in domestic visitor numbers (-59.9%), nights (-55.8%), and expenditure (-69.5%) (Destination NSW 2021b). This compared to much smaller reductions in regional NSW for the same period: -21% (visitors), -14.9% (nights) and -13.7% (expenditure) (Destination NSW 2021c). The significant negative economic impacts on Sydney's visitor economy during the Covid-19 pandemic served to highlight the important contribution of international visitors to the NSW visitor economy, especially those visiting from China.

The ongoing Covid-19 pandemic and increasingly tense geopolitical relations between Australia and China make it difficult to predict the future growth of the Chinese visitor market in NSW and Sydney. Continued poor diplomatic relations and reporting on negative sentiments toward China could impact the growth of key visitation sectors (such as, tourism and education), and any future fluctuations in China's economy may also inhibit the ability of Chinese people to travel (Fang 2019). While the political relations between Australia and China have become increasingly strained during the Covid-19 pandemic, there is a continued emphasis on the importance of Chinese visitors for continued growth of the NSW visitor economy (Norris 2021).

The NSW government recognises the economic importance of Chinese visitation and has actively sought to grow visitor numbers and expenditure. Alongside national initiatives, NSW state government bodies have developed their own resources for the NSW tourism industry. This includes the development of factsheets on key market segments (e.g., FIT, baby boomers, luxury tourists and Chinese tourists from primary and secondary cities), and regular time series profiles. NSW has also developed a *China Market Toolkit* (Destination NSW 2015) which provides information on the Chinese visitor market, including: general overviews; advice on catering for Chinese visitor needs; marketing suggestions; and advice on how to conduct business in China. The document is designed to coordinate efforts across the NSW tourism industry, government departments and other tourism stakeholders. As with other Australian states, NSW has a desire to encourage Chinese visitation in regional areas to better spread the benefits of this market. To assist with this, the NSW Business Chamber Tourism Industry Division commissioned a report looking at how Chinese visitation to regional NSW could be better encouraged and supported (See Beree 2017).

Strategies of attracting Chinese visitors

RQ 1a. Looking at how your destination attracts diverse Chinese tourists and identify the main success factors.

NSW has been successful in attracting a large proportion of total Chinese visitation and expenditure in Australia. Tourism is a relatively new leisure pursuit for many people from mainland China, and a large proportion of Chinese visitors to Australia are on their first trip to the country. Destination NSW (2015: 4) writes that 'Chinese visitors have a limited knowledge of Australian destinations', and as such are 'drawn to famous landmarks and major attractions'. The Sydney and surrounds region contains many major sites, attractions and experiences that have been captured in tourism marketing and representations of Australia (e.g., the Sydney Opera House, Sydney Harbour Bridge, Bondi Beach). NSW also has a well-established tourism product with a diverse array of accommodation, attraction, restaurant, tour, shopping, and service options to cater for various Chinese visitation market segments. The geography of NSW also allows for a diversity of nature-based experiences and a pleasant year-round climate in Sydney. These features have been successfully leveraged into a brand that attracts Chinese visitation to NSW and has helped to position Sydney as a highly desired place to visit during travel to Australia. To help facilitate its marketing activities, Destination NSW has also established four offices in mainland China (Beijing, Shanghai, Chengdu, and Guangzhou) to assist with marketing the NSW tourism product.

Sydney is also a key gateway to Australia from China. In 2018/2019 there were 1,118,991 inbound seats on flights from China to Sydney (Destination NSW 2019b). The development of a second Sydney airport in Western Sydney (due to be operational in 2026) holds the potential to further expand inbound seats, and Chinese visitation. Murray (2017) reports that the Chinese government has a desire for the new airport to form part of China's belt and road plan, and it is anticipated that the airport will form a major freight hub between the two countries.

Beyond the leisure market, NSW has a large tertiary education sector with a strong international reputation and ranking. These institutions have been successful in attracting Chinese students (who have in-turn played an important role in contributing to the finances of these institutions). In 2018/2019, 15% of total Chinese visitation (and 60% of visitor's nights) to NSW was for education purposes (Destination NSW 2019b). The education sector, and particularly universities themselves, have been active in pursuing Chinese international students through targeted campaigns, and in country recruiters. NSW also has a large Chinese community. At the 2016 Australian Census, NSW contained 42.4% (514,594) of people in Australia who identified as having a Chinese ancestry, 46% (234,508) of people born in China, 40.2% (239,945) of Mandarin speakers, and 51% (143,333) of Cantonese speakers. Chinese students and migrants result in a significant Chinese market for visiting friends and relatives (VFR) to NSW (18% of total visitation) (Destination NSW 2019b).

As a global city, Sydney receives a significant proportion of Chinese business travellers. In 2018/2019 4.7% (35,400) of the total Chinese visitor market to NSW was visiting for business (Destination NSW 2019e). This market engages in tourist activities alongside their work commitments, and Taylor (2018) observed that they make a significant contribution toward the luxury tourism sector.

Chinese social media platforms have been particularly successful in attracting Chinese visitors to experiences and attractions. Ludlow (2017) highlights the important role of social media in contributing to more than one-third of all Chinese visitors to Australia visiting the Sydney Fish Market. Photographs of seafood at the market have been widely circulated on Chinese social media platforms (such as WeChat and Weibo). The Fish Market's popularity has resulted in the Chinese online payment platform Alipay using it as a test site for an app-based menu translation and payment service (Koehn 2019). The circulation of photos of Black Star Pastry's Strawberry Watermelon Cake on WeChat saw the Newtown bakery become a must-see experience for Chinese visitors. This was fostered by a partnership between the bakery and Destination NSW (Pitt 2018a). Similarly, Pitt (2018b) speaks about how Destination NSW invested in the promotion of flowering Jacaranda trees in November on a street in Kirribilli via social media. The destination has come to be a significant attraction for Chinese tourists (among other international markets).

NSW, and especially Sydney, has been fortunate to have attributes that are highly attractive to the Chinese visitor market. However, as with other states, NSW has struggled to disperse visitation from Sydney to regional area. One strategy that has been identified as holding potential to grow regional visitation is targeting the education market. The NSW Business Chamber (2017) writes that Chinese students often seek new experiences outside of cities and become decision makers and guides for visiting family. As such, Destination NSW and the NSW Business Chamber are developing dedicated marketing for the education market that encourages VFR visitation to regional NSW.

Catering to Chinese visitors

RQ 1b. Examine how the DMO and some businesses in your destination cater to the needs of Chinese tourists and evaluate their successes and failures. Provide context.

Destination NSW has developed resources to assist businesses to better understand and cater for the needs of the Chinese tourist market (e.g., the *China Market Toolkit* (Destination NSW 2015)). Destination NSW also provides Simplified Chinese translations of key destination information, including the *Sydney.cn* website and the *Sydney Official Guide* (Destination NSW 2015). Destination NSW's (2012) *China Tourism Strategy* coordinates industry efforts to grow Chinese visitation and cater for the market's needs.

NSW, and especially Sydney, are increasingly drawing on technology to cater for Chinese visitors. This is particularly important given the Chinese visitor market is one of the most technologically literate and dependent (Destination NSW 2012, 2015). An agreement was reached between Cabcharge and the National Australia Bank to ensure that Sydney taxis accept UnionPay, China's largest payment network (Industry NSW 2013). In 2019, Alipay and Tourism Australia partnered to develop a 'Sydney City Card' app that promotes tourism and retail destinations to Chinese tourists (Bajkowski 2019). In addition to marketing key inner-city sites and facilitating payments, the app provides reviews and highlights promotions using geolocation technology. The trial has since been extended to Melbourne (Derwin 2019). Alipay has also partnered with local businesses to improve Chinese visitation experiences. In 2019 Nicholas Seafood (at the Sydney Fish Market) became the first business to launch a new Alipay payment platform that translates menus and allows shoppers to make purchases without needing to communicate with staff in English (Koehn 2019).

Strategies which have been identified to improve visitation to regional NSW include: improving transport infrastructure (including cost and frequency); working with interstate airports that provide closer access points than Sydney (i.e. Gold Coast and Canberra airports); providing regional NSW with tailored advice and assistance; and, improving mobile connectivity so that visitors can better access technology based services, such as smartphone apps that facilitate payment, navigation, translation, information sharing and communication (NSW Business Chamber 2017).

Strategies used to manage sentiments towards Chinese visitors

RQ 1c. Investigate how sentiments towards Chinese tourists are managed (or not managed) in your destination by the DMO/peak body/businesses. Provide context.

While there do not appear to be any strategies that directly address negative sentiments toward Chinese tourists, Destination NSW's (2015) *China Market Toolkit* and market segment snapshots have been developed to foster a better understanding of the Chinese visitation market. Destination NSW actively encourages cultural awareness, including an acknowledgement of the need to improve knowledge of the Chinese market in regional NSW.

Media reports on Chinese tourists in NSW and Sydney are generally positive. This is owning to a significant focus on the economic benefits that have been come from Chinese visitation. There is some mention of 'zero dollar' tourists from China, although this has been refuted by reporters who demonstrate the value of Chinese visitation to the economy and contribution to total visitor expenditure (See Taylor 2018). This positive sentiment toward Chinese tourists, sits in contrast to a growing negative sentiment toward China in general, including Chinese business, investment, influence, and the Chinese government more broadly.

The only tourist segment to gain negative coverage has been high-end gaming visitors. In 2019 the Star Casino had its proposal to build a 237-meter-high tower containing a 220 room Ritz-Carlton hotel and 204 residential apartments at its Pyrmont site turned down by the NSW state planning department (Gorey & Cummins 2019). The casino, and development supporters, argued that Sydney needs new luxury hotels so that it does not lose the high-end Chinese tourist market to other states and countries (Risso 2019). Discussions of amending NSW planning legislation to allow developments that attract wealthy Chinese visitors has mixed with negative sentiments toward Chinese property investment in Sydney, and risks developing negative sentiments toward other Chinese visitor segments.

There has also been some discussion of Chinese visitors being tricked by travel agents. Evlin (2019) wrote about Chinese tourism websites claiming that the main quadrangle at the University of Sydney was a set location for the Harry Potter films. This was further reinforced by tour guides, and the university received a boom in visitation and enquires. There were also reports of a major credit card scam in 2017 that targeted Chinese tourists. Tickets to major attractions were purchased using stolen credit card details and on-sold to the China market (Roberts 2017). Major attractions, predominantly in Sydney (e.g., Sydney Bridge Climb), Melbourne and Queensland were losing hundreds of thousands of dollars through being left to reimburse credit card companies and admit the visitors. These instances of Chinese visitors being tricked, risks developing a reluctance to deal with the Chinese visitation market and creating a reputation of Chinese tour operators and travel agents as being disingenuous.

How have Chinese tourist experiences been used to promote business and international relations?

RQ 2a. Examine how your state/country has successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies. Provide context.

While it is difficult to determine how tourism is currently leveraged to assist with international business relations and strategies, there are many ways in which tourism can contribute toward achieving NSW's investment and trade ambitions. The NSW government's *China Strategy* (Industry NSW 2013) outlines several engagement goals, including: strengthening trade; encouraging investment in infrastructure and the financial sector; and growing tourist and education visitation. To achieve these ambitions, the government express a desire to build upon existing Sister State Relationships and Memorandums of Understanding, to create new connections and opportunities to facilitate better cross-cultural understanding (Industry NSW 2013). While NSW's *China Strategy* does not specifically identify tourism as assisting with this, tourism (and visitation more broadly) is well-placed to assist with helping to foster cross-cultural understanding and connections.

NSW's largest industry is the financial services sector (Industry NSW 2013), and the NSW government recognises an opportunity to encourage China's rapidly growing middle-class to invest into NSW's wealth management services. It is this same middle-class who are increasingly engaging in tourism experiences, studying, and conducting business overseas. As such, tourism holds the potential to help build trust and familiarity with Australian people, institutions, and governments, to foster investment. However, there is also a risk presented by negative visitation experiences, which could present a negative image of Australia and harm trade and investment opportunities.

The NSW government has also identified opportunities to sell agricultural products into China (Industry NSW 2013). While not mentioned in strategy documents, tourism provides opportunities to showcase food and beverage products to help achieve these ends. There have been many instances where Australian produce become well-known from photograph sharing on social media platforms such as WeChat, and there are opportunities to further leverage this technology. For example, Australian brands in the luxury retail sector are working to attract Chinese influencers to grow sales (Hales 2019).

China also has a strong interest in trade and investment with NSW. Industry NSW (2013) identifies China's main interests as being: mineral acquisition; investment; finding new markets for Chinese manufactured goods; knowledge acquisition and training; and acquiring high-end agricultural, food and beverage products. As a result, Chinese airlines have rapidly increased the number of passenger flights into Sydney to not only facilitate tourism, but education, trade, and investment opportunities. And there are no firm lines between these visitor categories, as show in media reports demonstrating business travel's significant contribution to the luxury tourism sector (See Taylor 2018).

Tourism for bilateral ties

RQ 2b. Examine and evaluate how tourism is used by authorities in your state/country in their charm offensive strategies. Provide context.

NSW's use of tourism as a part of its 'charm offensive' has not been widely reported in the media or discussed in official documents. There has been some discussion of Destination NSW using Chinese social media influencers to showcase tourism products, and recognition of the power of Chinese social media platforms to attract visitation. Packaging tourism with other trade products has allowed Sydney and NSW tourism marketing materials be used to showcase the state during trade missions. Famous tourism products and destinations are also drawn upon as venues and backdrops for visiting dignitaries, and trade and investment meetings and events. In these ways the visitation experience is used to enhance the image of NSW and Sydney as a place to conduct business.

Summary Table

Questions	Destination: New South Wales / Sydney
RQ1a Successful strategies	• NSW has many 'must-see' Australian attractions, which are particularly appealing for first time visitors. • NSW has a well-established and diverse tourism product. • Sydney is a key gateway city for flights from China. The development of second Sydney airport in Western Sydney will likely add to this capacity. • NSW has many highly regarded tertiary education institutions, and a large Chinese community, which in-turn generates a significant VFR market. • As a global city, Sydney attracts business visitation, which contributes toward the luxury tourism market. • Sydney has diverse shopping opportunities, including luxury shopping, which has been popular with the Chinese visitation market. • Social media and technology have been used effectively to attract visitors. There are a growing number of technology partnerships designed to help facilitate payment, translations, and the visitor experience. • Encouraging regional visitation has been difficult. Targeting VFR visitation to regional areas via the education sector has been suggested.
RQ1b Serving the specific needs of Chinese visitors	• Destination NSW has developed resources to assist the tourism industry and related businesses to cater for Chinese visitor needs. • Destination NSW has a strategy document (*China tourism strategy 2012–20*) to coordinate efforts across key stakeholders. • Growing use of technology and Chinese app-based payment systems and services.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• No specific strategies to address negative sentiments toward Chinese visitors/tourists. • Chinese tourists are framed mostly positively in the media, which tends to focus on the economic benefits. • Some suggestion that Chinese travellers do not spend much money, however, this has been refuted in recent reporting which shows that they spend more on average than other international markets. • Some negative sentiment toward high-end gaming visitation, which could spread to other segments.
RQ2a How have Chinese tourist experiences been used to promote business and international relations?	• Tourist experiences do not appear to be being used in any systematic way to promote business and international relations. • Tourism holds the potential to support the NSW government's engagement strategies. This includes: building relationships, developing cross-cultural understanding, building trust and knowledge of investment opportunities, and showcasing agricultural, food and beverage products. • There is a risk to foster trade and investment if visitation experiences are negative. • China's trade and investment ambitions in NSW are also fostered through facilitating Chinese visitation.
RQ2b How tourism is used to affirm bilateral ties	• No reporting on NSW's use of tourism in its 'charm offensive' strategies. • Some mention of Destination NSW soliciting Chinese influencers to promote NSW tourism destinations and experiences. • NSW's tourism attractions are drawn upon as imagery to help sell NSW trade and industry and provide important venues and experiences to charm dignitaries and business travellers.

Appendix A5. Queensland

Dr Elaine Yang

Dr Ying Wang

Introduction

Overview of tourism in the destination

Tourism is a key driver of the Queensland (QLD) economy. The industry contributes $25 billion ($12.8 billion directly and $12.5 billion indirectly) to the QLD economy, accounting for 7.8% of QLD's gross state product (GSP). The industry also employs 217,000 (or 9.1% of all people employed in QLD) directly and indirectly each year (Queensland Government 2018). Tourism plays an important role in regional development in the state. The state recognizes transportation and accessibility as key factors in tourism development and the need for strategic integration of tourism into the state's overall infrastructure plans (Queensland Government 2016a). The state has strengthened its emphasis on the growing Asian middle class in the "Advance Queensland: Connecting with Asia Strategy". It attempts to grow tourism from Asia through innovative products, enhanced digital connectivity, and greater aviation access (Queensland Government 2016b).

Tourism numbers, Chinese tourism numbers, projection

QLD attracts more than 26 million domestic and international overnight visitors annually (Queensland Government 2019d). In 2018, the Mainland China market contributed approximately 489,000 visitors, equivalent to 18% of the market share, and $1.6 billion, which was about a quarter of all tourist expenditure, towards the state's economy (Tourism and Events Queensland 2019c). 69% of the surveyed QLD tourism operators indicated that at least 1-10% of their visitors were of Chinese nationality (Tourism and Events Queensland 2019d). Popular destinations for Chinese include Brisbane, the Gold Coast, and Cairns. The Gold Coast was named the top Australian destination for outbound Chinese travellers (Jackson 2017), receiving approximately 6,000 visitors from China each week (Keen 2018). Some attributed the Gold Coast's popularity to Chinese travellers' strong cultural connection with wealth and luxury, and their desire to explore beyond major cities (Beardsell 2019). 81% of Chinese visitors came to QLD for holiday, which is notably higher than Chinese who visited Australia in general (59%). The second main purpose of travelling to QLD was visiting friends and family (VFR), accounting for 10% of the market, which is significantly lower compared to the reason for visiting Australia in general (27%) (Tourism and Events Queensland 2019b). The statistics indicate the significance of leisure travel from the China market in QLD and provide implications for product and infrastructure development.

Although the number of Chinese tourists in QLD has declined in recent years, China remains the largest and most valuable inbound visitor market for the state in the year ending March 2019 (Tourism and Events Queensland 2019b). On the contrary, total expenditure by Chinese tourists has increased considerably, which can be attributed to the shift in Tourism Australia's strategy from targeting tour groups to Free Independent Travellers (FIT), which is a higher yield market. The decline in number and increase in expenditure can also be regarded as a sign of consolidation of the China market in QLD. The Chinese FIT market is expected to outgrow the group market within 3 to 5 years (TropicNow 2018).

The closure of Australia's border due to the Covid-19 pandemic has inevitably resulted in the sharp decline of Chinese visitor number by 89.1% and expenditure by 80.7% in Queensland, which are higher than the national average at 86.1% and 77.7% respectively (Tourism and Events Queensland 2020). The statistics reinforce the importance of Chinese visitors to Queensland's economy, especially in the recovery from the pandemic. Tourism operators in Queensland are optimistic about the return of affluent Chinese visitors and anticipate the Queens Wharf, a major tourism development project that is currently underway in Brisbane to be a timely drawcard post-Covid (Knowles 2021).

Official and industry emphasis on Chinese tourism in relation to others

The QLD government has created a dedicated webpage, "Become China Ready" to provide resources to the industry to better attract and cater to Chinese visitors (Tourism and Events Queensland 2019a). The China market has been singled out as the state government's strategy to build tourism on the Gold Coast (Rozario 2018). While the state government continues to foreground the important contributions of the China market to QLD's economy, the recent Queensland Asia Tourism Strategy 2016-2025 shows that the state government is gradually moving towards maintaining a balance in diversity in its market portfolio within Asia in the next 6 years. The shift is facilitated by the resurgence of the Japan market and the growing Southeast Asia market (McDonald 2019).

Broad understanding of what matters to Chinese tourists

Existing literature identified rest and relaxation, experiencing something different, natural environment, shopping opportunity, and pricing as the key push and pull factors for Chinese visitors (Osmond 2015; Zhang & Peng 2014). Chinese tourists are concerned about personal safety and language barriers when visiting Australia (Jin, Wu, Becken, and Ding 2016). At a destination level, flight connectivity and infrastructure have been identified as two main concerns for Chinese tourists visiting QLD. Chinese tourists are particularly attracted to QLD's:

- Iconic natural attractions, such as rainforests, Great Barrier Reef and other nature-based experiences (Prideaux, Cave, Thompson, and Sibtain 2012);
- Pristine environment, such as Whitsundays, targeting high-end travellers (Lee 2019); and
- Vast open spaces (Tatham 2018) and 'big blue sky' (Ludlow 2017a; Sexton-McGrath 2017).

Studies (e.g., Li & Carr 2004; Peng 2013) have reported an overall satisfaction among Chinese tourists visiting QLD regions, implying the general effectiveness of the state's Chinese tourism management strategies. This effectiveness may be attributed to the state and local governments' continuous investment in marketing, product design, training, infrastructure development, and accessibility, in catering to the China market.

1.1 Attracting Chinese Tourists

Marketing and promotion

QLD government's commitment to the China market is evidenced by the Queensland on Tour Great China mission, which aims to promote QLD as a destination and deepen the trade engagement for the tourism industry. As part of the program, QLD's tourism agencies and operators have travelled to China to meet with key trade partners and gain direct market insights, which are crucial to strategically attract more Chinese travellers to the destination. As part of the QLD government's Connecting with Asia strategy, the state government signed a Memorandum of Understanding with Ctrip in 2019 to promote the state. The partnership has seen the launch of a marketing campaign in Shanghai subway station, showcasing QLD as a holiday destination to 13 million Chinese commuters (Tourism and Events Queensland 2019c). Other activities from the partnership include introducing a Queensland 'CityExperience Mini Program' within WeChat and opening Australia's first Ctrip store at the Gold Coast Airport (due to open late 2019) (Queensland Government 2019c; Tourism and Events Queensland 2019c)—both are targeting Chinese FITs over group tours. While marketing efforts have shifted towards interstate and intrastate tourism, as evidenced in the recent 'Queensland's good to go' and 'the last-minute holiday deals' campaigns, the QLD tourism industry recognises the need to maintain a strong relationship with China as its important partner for tourism (Norris 2021).

Market/Experience Diversification

In the Whitsunday region, Hamilton Island resort foresaw the potential of Chinese FITs as opposed to tour groups in 2013. The strategy has been successful as the resort observed a growth from 1% Chinese visitors in 2013 to 8% in 2017. In fact, the average expenditure of Chinese FITs in that resort has surpassed other international markets. Business travel, including MICE, is another priority target market in QLD. The state government has launched initiatives to attract business events and delegates from China since 2016 (Liang 2018). The initiative has generated $40 million to the Gold Coast and is expected to inject $82 million in the coming years. In Cairns, Chinese corporate travellers are injecting $40 million into the local economy through large scale corporate events such as the Amway China 2019 Leadership Seminar, which brought 6,000 Chinese tourists to Cairns (Salkow 2019b). High-yield markets have been targeted with personalised wellness and medical tourism experiences. The Gaibo Agency was set up to facilitate the understanding and servicing of the China market, and to connect Australian tourism operators with Chinese influencers (Australasian Leisure Management 2019). Other strategies to attract Chinese visitors include foregrounding uniquely QLD experiences, such as the EKKA event. The event has successfully attracted 20,000 Chinese visitors from 2016 to 2018 (Australasian Leisure Management 2018).

Accessibility

The Palaszczuk Government has invested more funds ($10 million) than any previous government to support international flights and partnerships with airlines (Salkow 2019a). The state government plans to position QLD as the gateway to Australia for the Asian market, of which the China market plays a predominant role, and to disperse visitors towards regional areas (Queensland Government 2017). An aviation agreement signed between the Australian and Chinese governments in 2017 to allow for better connectivity has resulted in the increased direct flights and new airline routes from China to QLD (e.g., from Shenzhen to Brisbane/Cairns) to cater to the growth of the Chinese FIT market (Ciobo 2017; Pierce 2019a; Steiner 2017). Tourism Tropical North QLD is also working on increasing direct charter flights during Chinese New Year, a peak holiday season in China.

However, the air capacity linking Cairns and Southeast China was reduced in early 2019 when two leading airlines announced cutbacks on their operations. China Southern Airlines suspended direct flights between Guangzhou and Cairns citing a review of its international routes (Salkow 2019b), and Cathay Pacific, after 25 years' operation, decided to discontinue its Cairns to Hong Kong route, a critical route linking the region to China and the UK, in October 2019. Cathay's decision puts the region's China Strategy under serious threat and has 'devastating' impacts on both the tourism and agriculture/aquaculture industries (Salkow 2019a). The reason underlining Cathay's decision was not clear and the government was seeking to reverse this decision.

Investment in infrastructure

To successfully attract Chinese visitors, investment in visitor infrastructures such as hotels, airports, inner-city cultural, arts and gaming precincts, new attractions, and signature events, are required and being secured/made (Pierce 2019a; Salt 2019). In particular, the state government has invested heavily to upgrade and redevelop airports in gateway cities to support the increased direct flights (Calcino 2019).

1.2 Catering to Chinese Tourists

Removing language and cultural barriers

Tourism and Events Queensland (TEQ) has developed a set of information and training resources related to service standards, Chinese culture, and visitor expectations to better cater to the China market (Tourism and Events Queensland 2019a). Some of these resources include cultural and language training to tour operators and digital marketing strategies targeting the China market. The Chinese Language Teachers Association in Queensland highlighted the importance of adequate Chinese language and cultural skills in post-Covid-19 tourism recovery and encouraged tourism operators to learn basic Chinese to attract Chinese FITs (Moss 2021).

The state government introduces Chinese payment platforms, e.g., Alipay, WeChat pay and, UnionPay, at the China Payment Expos in key destinations in QLD to inform tourism operators the Chinese payment landscape in order to further attract and provide a sense of familiarity to Chinese visitors (Queensland Government 2019b). The official partnership (MOU) between the QLD government and WeChat has resulted in better experience distribution and delivery to Chinese FITs, through the CityExperience Mini Program that allows bookings, payments, interactive travel guides of tourist spots, making the trips to QLD destinations more convenient (Pierce 2019a). Gold Coast airport takes one step further to recruit a team of Chinese officers to greet Chinese visitors at the airport (Thomson 2018).

Unfamiliarity and personal safety concerns deter Chinese tourists' interest in visiting regional areas in QLD (Passmore 2019). A number of strategies have been suggested/implemented to address these concerns, including distributing the travel safety guidelines in both English and Simplified Chinese, and creating a sense of familiarity through deals on Chinese booking sites and payment systems such as Alibaba and UniPay. Other strategies include setting up police programs in both Mandarin and Cantonese on the community radio channel and promoting a safe and welcoming destination image (Passmore 2019; Weber 2019). This fits into the broader campaign by Tourism Australia to promote regional Australia to the FIT and student markets as safe destinations despite the lack of facilities and services, such as free Wi-Fi and transport (Needham 2019).

Tourism businesses are re-designing/adjusting product experiences for the China market. An example is Get Wet Surf, a local surf business on the Gold Coast, adapting to the young Chinese adventure market by partnering with university researchers to re-engineer the experiences and employing Chinese instructors (Pierce 2019a). Taking into consideration the Chinese attitude towards sun exposure, the operator also introduced long sleeve surf shirt and afternoon classes. The strategies have been successful as reflected in the increase of Chinese customers from 1% to one-third of their customer base (Pierce 2019a). QLD's operators have also incorporated Chinese cultural values in experience design, for instance with "customised surfing skill level to avoid losing face" (Passmore 2019: para. 25).

Ripping Off incidents

There have been reports on Chinese tourists being 'ripped off' by rogue Gold Coast businesses. Tourists were charged for visiting Gold Coast beaches (Pierce 2019b) and paid inflated prices for souvenirs and restaurants (The Sydney Morning Herald 2003). Unethical business operations have been a persistent issue in the inbound Chinese market despite repeated media exposure (e.g., Michael 2012; The Age 2005; The Sydney Morning Herald 2003) and the efforts (e.g., crackdowns, compliance blitz, suspension of operation, introduction of a mandatory code of ethics) by the government and industry to curb such practices.

1.3 Sentiments Towards Chinese Tourists

Sentiment towards Chinese tourists varies across different stakeholder groups. While tourism operators are profiting from the China market, local residents and other tourist groups whose quality of life or experience has been negatively affected may hold a negative sentiment towards Chinese visitors. For instance, large Chinese tour groups have a negative reputation for unfavourably affecting the hotel ambiance. One resort in Hamilton manages the problem by targeting Chinese FITs (Ludlow, 2017b). Other critical incidents are related to Chinese investments and Chinese international students, which warrant discussion at a greater length.

Chinese Investment

QLD attracted approximately 5% of all Chinese investments in Australia in 2018, of which 85% were in the commercial real estate sector (KPMG & University of Sydney 2019). The state government encourages more Chinese investments in areas where potential synergies exist in China, such as mining, energy, tourism and health care (Queensland Government 2019a). Chinese tourism is seen in a positive light from the perspective of profiting local businesses (Sexton-McGrath 2017), which may or may not be the direct cause of higher share prices for major tourism players such as Village Roadshow, Elanor Investment, and Eumundi Group (Sundich 2019). Whilst not specific to QLD, Chinese investors see Australian media coverage to be unsupportive of their investments (KPMG and University of Sydney 2019). For example, media revelation of questionable business practices, such as a Chinese resort developer hosting a QLD MP at home (Vogler, McKay, and Marszalek 2019) could have potential ramifications on the public's perceptions of Chinese investments in tourism. The negative sentiment towards Chinese investment is further evident in the controversial multibillion-dollar integrated resort (with a casino and cruise ship terminal) proposal by ASF Chinese consortium in Gold Coast. Despite the promising economic contribution, the proposal was heavily criticised by the locals and was rejected by the QLD government in 2017 (O'Brien 2017). One of the concerns raised was about turning public space into a privately-owned foreign enclave (Save Our Spit Alliance 2017). Although the concern was not exactly a negative sentiment towards Chinese tourists per se, it could have potential ramifications on people's perceptions of Chinese investments in tourism and could be extended to Chinese tourists who are often used by Chinese developers to justify development projects – see also the Tallebudgera Wellness and Tourism Gardens project (Gellie 2019). The growing political tension during the Covid pandemic made Chinese investment difficult but the Gold Coast continued to welcome Chinese investors (The Gold Coast Bulletin 2020). It is noteworthy that attitude may vary across local contexts (e.g., dependence on international/Chinese tourists, perceived impacts, etc.).

International Students

There has been ongoing political tension between Australia and China in recent years, and Chinese tourists are sometimes met with confusion, scepticism and even racism – Chinese tourists have encountered locals who are not welcoming (Xu 2019). Chinese international students are an important travel market in QLD, which hosted 137,000 international students in 2018 (Trade and Investment Queensland Australia 2019). Sentiment towards Chinese international students have been detrimental in the wake of the fallout from the Hong Kong international student protest at the University of Queensland (UQ) against the extradition law controversy in Hong Kong (Zhou and Smee 2019). One week after the violent clashes at the protest, UQ students organised another protest against China-funded education centres and specifically naming the Confucius Institute (SBS News 2019). UQ and the university sector's connections with China attracted widespread media attention as the dispute between UQ and a student activist evolved into a $3.5 million lawsuit (Tuffield 2021). These incidents exacerbate the already negative sentiment in QLD caused by the negative publicity on the alarming contract cheating among Chinese international students (Zhao & Liu 2019) and the increasingly tense Australia-China relationship (Walker 2019). This is further aggravated by pandemic-induced racism against Chinese and Asian students in general. Several international students were violently attacked in Brisbane, with the attack appeared to be racially motivated (Chung 2021). Nonetheless, little actions are observed from the QLD government and tourism industry to directly respond or manage this sentiment.

2.1 Leveraging Chinese Tourist Experiences and Perceptions

Chinese tourism has good potential for regional areas through drive tourism (Tatham 2018). The 'Drive North West Queensland' campaign encourages tourists to go beyond the coastal areas to explore the outback. Some see opportunities for the campaign to capitalise on Chinese tourists, particularly Chinese students in Australia who are interested in exploring rural Australia. Whilst the current number is low, there is potential for this market to grow rapidly to benefit regional areas.

QLD has leveraged on Chinese tourism to attract international investments and to create business opportunities. For instance, Chinese investments help revive tourism infrastructure and facilities (e.g., the struggling QLD resorts) (Robinson 2018) and the Gold Coast leverages on Chinese business travellers to showcase the destination's tourism assets and leisure opportunities (Potts 2019). The Queensland Government has put in place policies for supporting international investments and is careful not to repeat the lessons from the Japanese boom (Robinson 2018).

The retail industry is benefiting from China tourism. Shopping is an important activity for many Chinese tourists, which could be attributed to the Chinese culture of souvenir giving. Local products such as vitamins, baby formula, honey, and sheep wool are popular items on the shopping list of Chinese tourists. A 2004's study identified shopping experience in Gold Coast as a main area for improvement to attract Chinese tourists (Li and Carr 2004). This issue has been addressed with the redevelopment of the Pacific Fair, which is now ranked the top shopping mall for Chinese tourists as it offers a wide array of luxury goods and health/wellness products (Duke 2018). The increased air routes also bring more freight opportunities to food producers for exporting their products to China (Lawnham 2017).

2.2 Using China Tourism as Charm Offensive Strategy

The QLD government and local authorities have consistently foregrounded tourism in their economic strategy. In particular, the QLD government claims to have invested more money in the tourism industry than previous governments (The Hotel Conversation 2019). As mentioned earlier, the China market is singled out as the state government's strategy to build tourism on the Gold Coast (Rozario 2018).

Against the backdrop of these narratives, Griffith Institute for Tourism and Griffith University's Tourism Confucius Institute hosted the 'East-West Dialogue on Tourism and the Chinese Dream' (hereafter, the Chinese Dream conference) twice on the Gold Coast in 2014 and 2017 respectively – the latter was in conjunction with the China-Australia Year of Tourism. The conference aimed to provide a platform for "tackling challenges and opportunities that arise from rapid tourism growth with a particular focus on the Asia Pacific region, and the China-Australia relationship" (http://www.chinesedream.conferenceonline.com.au). The conference received financial and administrative support from the government (including Tourism Australia and Gold Coast Tourism), industry and academic agencies from both Australia and China.

Rowen (2019: 17) provides a critical analysis of the 2017 Chinese Dream conference in the context of geopolitics and soft power. The author questions the positioning of the conference within the rhetorical bounds of the 'Chinese Dream', which is "a discursive instrument devised and deployed to support the rule of the Chinese Communist Party". Furthermore, given the involvement of the government officials from both countries, the 'East-West dialogues'" occurred at the conference came across as celebratory and political inflected to some extent.

The Chinese Dream conference could be regarded as a contentious charm offensive campaign to affirm the bilateral ties between Gold Coast/QLD and China. More recently, QLD Tourism Industry Council chief executive Daniel Gschwind remarked that interactions with visitors from different backgrounds are the best tool for soft diplomacy (Norris 2021), highlighting tourism's potential to contribute to a more positive Australia-China relation.

Summary Table

Questions	Destination: Queensland
RQ1a Successful strategies	• Establish Queensland on Tour Great China mission for destination marketing and industry engagement. • Partner with Ctrip and WeChat to promote QLD. • Target on FITs and business travellers over group tours. • Increase direct flights and establish new air routes. • Position Queensland as the gateway of Australia for the Asian market. • Investment in infrastructures.
RQ1b Serving the specific needs of Chinese visitors	• Provide information and training resources to tour operators. • Remove language and cultural barriers. • Adapt product to meet Chinese tourists' needs. • Introduce Chinese payment platforms. • Develop mini program on WeChat. • Install Australia's first Ctrip concept store in GC.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• Attract Chinese FITs over group tours. • Reject certain controversial development projects by Chinese developers. • Little actions taken to manage negative sentiments towards Chinese international students.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	• Regional development. • International investments. • Opportunity for retailers. • Increase freight capacity for export.
RQ2b How tourism is used to affirm bilateral ties	• The Chinese Dream Conference.

Appendix A6. Tasmania

Dr Ma Yue
Professor Can-Seng Ooi

Tasmania has a population of more than half a million, and a land mass of about 68 000 km^2. Mining is the state's biggest industry. Tourism is second and is one of the promising sectors in the state's strategy (Department of State Growth 2019). Tourism contributes about 10.3% (AU$3.2 billion) to the Gross State Product, which is the highest proportion in the country (Tourism Tasmania, 2019). In the year ending September 2019, visitors to Tasmania totalled 1.32 million including 293 000 international visitors. The total international visitors' expenditure in Tasmania was $536 million (Tourism Tasmania 2020a).

For the year ending September 2019, out of the 1.32 million visitors, 1.13 million were from other Australian states. China and Hong Kong ranked alongside the USA and UK as Tasmania's largest source markets for international tourists (Tourism Tasmania 2020a).

China was Tasmania's fastest growing tourism market in the last decade although there was a significant drop of 21% to 40,900 in the year ending September 2019 (Tourism Tasmania 2020a, 2020b). Chinese tourist growth started only in 2009, from a base of around 2700 visitors. In 2011, the number was 8000. The decrease in visitors from China to Tasmania prior to the pandemic – in contrast to China's growing outbound market then – suggests that more efforts are needed to make Tasmania more attractive to Chinese visitors.

Despite the overall increasing numbers of Chinese visitors in the last decade, Tasmania was not the first destination of choice in Australia. Big cities such as Sydney, Melbourne and Brisbane were more popular (see other sections). While Australia recorded a total of 1,331,400 Chinese tourists for the year ending September 2019, only a small fraction (3.07%) of these visitors (40,900) chose to travel south to Tasmania (see Table below).

Table: Comparing international visitor numbers between Australia and Tasmania, year ending September 2019 (Source: Tourism Tasmania 2020a: 4).

International origin of visitors to Australia				to Tasmania			
China	1,331,400	►	1%	USA	45,800	▲	9%
NZ	1,275,800	►	1%	China	40,900	▼	-21%
USA	771,400	▲	5%	HK	29,600	▲	21%
UK	669,600	▼	-4%	UK	27,200	▲	7%
Japan	455,400	▲	9%	NZ	21,300	▼	-3%
Singapore	416,800	▲	9%	Share of visitors to AUS	3.4%	►	-0.2%

Strategies of attracting Chinese visitors

RQ 1a. Looking at how your destination attracts diverse Chinese tourists and identify the main success factors.

Despite some practical challenges, such as being less accessible, Tasmania benefited from an increase in Chinese visitor numbers before the pandemic. These were and are some of the strategies that have been credited for making Tasmania relevant to the Chinese market:

Celebrity advocacy/endorsement and influencer marketing is seen to be an important factor. For instance, visitor numbers from China jumped significantly after Chinese President Xi Jinping visited Tasmania on 18th November 2014 (Boscia 2018; Scutt 2018), especially in 2015 (Dang 2018). Similarly, Bobbi the purple lavender bear became popular with the Chinese, and its maker, Bridestowe Lavender Estate, became a major Chinese tourist attraction after famous actress Zhang Xinyu took a selfie with Bobbie after visiting Tasmania in 2013 (Dang 2018). The use of celebrities to promote Tasmania remains a central strategy in drawing in Chinese visitors, for example, internationally popular Chinese actor Duan Yihong's was invited by Tourism Australia and his trip was featured in the *New York Times'* June 2019 supplement; Duan has a following of five million in his Chinese social media Weibo account (Petersen 2019).

As China is large and marketing resources are always limited, in 2013, Tourism Tasmania strategically adjusted its international marketing effort by targeting the Pan Asian market. Tourism Tasmania used a travel trade partnership approach in China (Fitzgerald,2017). Instead of marketing to the whole of China, the focus was then on Shanghai, Guangzhou, and Beijing, with gourmet, golf and wilderness experiences as the main selling points.

Tourism Tasmania markets these as the main attractions: natural beauty and environment, rich history and heritage, spectacular coastal scenery, and the state's high quality, locally sourced and produced food, wine and local cuisine. While these are the island's strengths, how they are attractive in relation to other destinations in the eyes of the Chinese need to be investigated.

Destination Tasmania aims to attract affluent, high yield Chinese groups and free and independent tourists (FIT) (Fitzgerald 2017). Chinese FIT are more likely to seek more adventures and enjoy wildlife experiences than their compatriots (Han 2018a; Neville-Hadley 2019). Affluent Chinese visitors and Chinese FIT are different from other places, and studies need to be conducted to find out more about their preferred shopping and tourist activities. While wealthy and adventurous, most may not have the panache for luxurious hotels and glamping (glamorous camping) adventures.

Regardless an increasingly number of Chinese visitors are seeking experiences beyond major cities and attractions in mainland Australia. There are some who make Tasmania as their first visit to Australia, and many are repeat visitors to Australia. 'Big blue sky' and wilderness are becoming attractions for Chinese tourists (Ludlow 2018).

Overall, the travel access to Tasmania from China is limited. Hobart airport has already been upgraded to cater to the growing number of visitors to the state (Scutt 2018). In addition before the pandemic, Qantas planned to add extra seats to Hobart and operate more codeshare flights with China Eastern Airline between the two countries to support the ongoing growth (Paynter 2018).

Tasmania is listed and introduced as a destination in popular Chinese social media platforms, Mafengwo.cn(马蜂窝), Qyer.com(穷游网) and Ctrip (携程). These sites and platform offer tours, information, and reviews, and remain popular in China. It is essential to have a presence there because they are ports of call for potential Chinese visitors when they seek information. A presence does not necessarily translate into success.

In sum, the island-state is attracting more Chinese visitors and their success is partly due to the wave of Chinese tourists travelling internationally. With the drop in visitor numbers just before the pandemic, bespoke strategies would be needed to take Tasmania to the next level of Chinese visitor growth.

Catering to Chinese visitors

RQ 1b. Examine how the DMO and some businesses in your destination cater to the needs of Chinese tourists and evaluate their successes and failures. Provide context.

Like in many other destinations in this report, the tourism industry in Tasmania has done much to cater to the needs of Chinese visitors. According to the Tourism Research Australia survey (2017), of those considering travelling to Tasmania, the most important triggers for travel included more information in Mandarin (42%), holiday and tour packages (38%) and cheap flight deals (38%). These are practical issues.

Mandarin-speaking park rangers are deployed during the busy summer period at Cradle Mountain, Mount Field and Freycinet National Parks in Tasmania (the top three national parks for Chinese visitors) (Howarth & McIntyre 2017). Many restaurants are now offering Chinese language signage and menus (Killick & Richards 2019).

Niche tourism products have also emerged. A Chinese entrepreneur offers fishing charters, scuba-diving tours and sightseeing trips for the summer peak season (China Daily 2019); and a Chinese investor purchased a hotel resort – Villa Howden to cater to couples wanting to have exotic on-location wedding shoots (Tan 2017).

Tourist products have been sinofied. Abalone is popular with many Chinese (Breen 2019). Additionally, to accommodate the growing Chinese market, the Bridestowe Lavender Estate in Tasmania has given the best-selling souvenir Bobbie the Bear an embroidered jacket, and offer its own red envelopes for the Chinese New Year period (Han 2018b). Bobbie the bear which is popular with Chinese tourists, has been enlisted for the state's road safety campaign (Howarth and McIntyre 2017).

The UNWTO and China Tourism Academy have released a set of Guidelines for Success sin the Chinese Outbound Tourism Market (2019). The suggestions focus on a broad understanding of Chinese culture and behaviour, offering guidance on making Chinese visitors feel welcomed and important (e.g., "handle items such as dishes and documents with both hands as a sign of respect" and "don't raise politically sensitive issues such as human rights or independence without great care", p. 29). It also highlights the emerging reality that Chinese visitors are diverse, including their desire to seek exotic experiences and travel slower while many go for mass travels. Regardless, most of them are technologically savvy. As the Chinese outbound market matures and Chinese visitors gain international travel experiences, it is also necessary for the tourism industry in Tasmania to take a more layered understanding of the Chinese market (Ooi 2019). For instance, the appreciation of nature differs across cultures and there is an opportunity to provide a number of Chinese perspectives on Tasmania's natural beauty (Ma 2019).

At a more general level, with the tourism industry expected to grow, infrastructure remains inadequate in some areas, including road capacity, clearing of rubbish, and accessibility to public toilets (Ross 2019). The public transport system needs to be improved (Han 2018b). These issues affect all visitors and residents; they are essential to having seamless visitor experiences in the state (Ooi 2020).

Strategies used to manage sentiments towards Chinese visitors

RQ 1c. Investigate how sentiments towards Chinese tourists are managed (or not managed) in your destination by the DMO/peak body/businesses. Provide context.

There are different layers of narratives on China in Australia, ranging from its geopolitical ambitions and human rights abuses to being an economic superpower and engine. Studies on local sentiments towards Chinese visitors are lacking. And amid both positive and negative stories on China, sentiments towards China, Chinese businesses and Chinese tourists are not proactively managed.

There are a few cases that illustrate the complex relationship between residents and Chinese tourists. For instance, the Break O' Day council (a town with a population of over 6000) wanted to erect China-friendly signs to receive their growing number of Chinese travellers (Howarth & McIntyre 2017). However, the Mayor also indicated that he wanted to make sure that having Chinese language won't offend any other visitors of other nationalities.

Sheffield, a town in the north of Tasmania attracted many Chinese visitors before the pandemic because there is a mural painted by Eason Chan there. The mural, of questionable artistic value, was however defaced in a spate of vandalism (Bennett 2019; McBey 2019). In the news report, Sheffield Inc president said this was done by "one self-centred, selfish, thick-headed individual in town who doesn't like Chinese visitors". And in Hobart, the then-Lord Mayor, Chris Christie was criticised for inviting Chinese to visit Tasmania during his business trip to Fuzhou. That city has 7.12 million residents and some Tasmanians became concerned with mass tourism and over tourism development through such promotions (Alouat 2018).

In yet another example, the controversial proposed Cambria Green project is worth $100 million and is backed by an Australian-Chinese investor. It will be a health and entertainment village that includes a golf course, 200 retirement houses, 70 villas, 240 units and a 120-room hotel and a crematorium. That proposal continues to be attacked by the Green party and local residents (Baker 2019). Many have seen this as a controversial project because it may interfere with the local environment, heritage, landscapes and lifestyles (ABC Premium News 2018), as well as concerns over foreign ownership and influence (Inglis 2019). Such views perpetuate an anti-Chinese perspective even though such investments will create jobs (Cowie 2018).

There are other Chinese-led projects that face resistance, such as an airport in Devonport for a pilot training school (Ford 2019) or the approval given to a Chinese company acquiring a Tasmania dairy business. The latter was lambasted by the popular independent Tasmanian senator Jacqui Lambie, stating that Beijing has undermined Australia's democracy and the major political parties are ignoring China's interference in the country (Lambie 2019). On the other hand, a China-born

Australian citizen, Yongbei Tang, was targeted for her potential relation to the Chinese government during Hobart City Council election (Baker and Fromberg 2019). A Mercury survey of more than 2500 Tasmanians has shown that most (78%) respondents are worried about the level of foreign ownership in the state (Whiteley 2019). A respondent in the survey wrote: 'Stop selling Tasmania to China, and place greater priority on maintaining our "clean, pristine wilderness" instead of getting drunk on the tourist dollar' (The Mercury 2019).

Regardless, such complaints must be understood within the democratic system of the country. Less dramatically, Chinese investments are still welcomed and approved, and Chinese visitors would still be served.

How has Chinese tourist experiences used to promote business and international relations?

RQ 2a. Examine how your state/country has successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies. Provide context.

In taking a whole-of-government approach, a new brand of Tasmania has been launched. The brand "Tasmanian" tells the story of the people in Tasmania, and how they make things work for themselves. Tourism Tasmania has interpreted the brand as a place for people to enjoy the clean air and beautiful environment. The brand will entrench the view of Tasmania as naturally beautiful. This is the main public diplomacy message that is marketed out to the world, including China. The focus on the Tasmanian nature in tourism overlaps with quality agricultural produce from the state. The message may change after the pandemic.

There is no apparent proactive strategy to leverage a positive tourist experience with other businesses and in international relations. Like in many other places, it is assumed that good tourist experiences will result in positive images, and through word-of-mouth, lead to empathy and sympathy for the state. This may enhance and promote the international business/relationship.

The Chinese view Australia positively as a tourist destination but most regional destinations, including Tasmania, remain relatively unknown (Han 2018b). For instance, in a survey conducted by Tourism Research Australia (2017), for the two largest Tasmanian cities Hobart and Launceston, only 28% and 22% of Chinese were aware of them respectively. This in contrast to Sydney (88%), Gold Coast (86%) and Melbourne (86%) (Tourism Research Australia 2017). Within this context, there is a limit on how a positive tourist experience can be used to leverage for other industries. And this does not hinder the joint promotion of tourism with other industries (next section).

Tourism for bilateral ties

RQ 2b. Examine and evaluate how tourism is used by authorities in your state/country in their charm offensive strategies. Provide context.

In the state's trade strategy, different industry sectors are seen to support each other (Department of State Growth 2019). In the year to August 2019, Tasmania exported $3.71 billion of goods worldwide, an increase of 34.1 per cent compared to the year to March 2014. China has become Tasmania's first $1 billion a year market — the biggest trading partner — accounting for a third of the state's overseas trade. In 2017 alone, Tasmanian merchandise exports to China grew by 52 per cent (Killick & Richards 2019).

Before the pandemic, the Tasmanian Government led a multi-sector Trade Mission to Asia yearly and called for expression of interest for Tasmanian businesses and organizations to be involved (Department of State Growth 2019). In 2018, the scope of key sections included agribusiness, food and beverage, international education, manufacturing, Antarctic affairs and tourism (Department of State Growth, 2018). In December 2019, trade delegation focused on the sectors of agriculture, energy, and forestry. Successful trade outcomes included the investment in research and development into growing Chinese traditional medicines in Tasmania for export; the renewable hydrogen industry; and the Tasmanian seafood and wool industry (Barnett 2019).

International flights to Hobart were introduced during the pandemic (to New Zealand). More international flights would make the island more accessible for visitors and goods. China is Australia's biggest trading partner; it is also Tasmania's. As alluded above, there are a few existing and proposed big Chinese investments projects in Tasmania.

Bellamy, a Tasmanian-based dairy company has been bought by China Mengniu Dairy for $1.5 billion (Robin 2019). Bellamy produces organic infant formula (Greenblat 2019). However, concerns were raised in the media on China taking over the state and country (Gray 2019; Lambie 2019). Such sentiments towards the Chinese were not restricted to foreign direct investments. Stories were heard about how Chinese tourist demand for baby formula has annoyed local buyers at supermarkets (Puddy and Burnie 2018). That was aggravated when the Chinese authorities changed regulations and Bellamy did not have the required approval for its organic infant formulas to be distributed through Chinese retail outlets (King and Wood Mallesons 2018).

Tasmania has a few brands popular in China. Besides Bellamy (organic baby formula), cherries have also become popular in China. Tasmanian fruits are certified pest-free. And a few farms flew fresh cherries to China during the lunar new year period since 2018 (Cherry Growers Australia Inc 2019). Before Covid-19, Hong Kong, China and Taiwan were the key export destinations for Australian cherries, representing over 61% of export volumes in Quarter1 2017 (Euromonitor International 2017). Local farms, such as Sorell Fruit Farm offered fruit picking experiences, targeted at Chinese tourists.

It has been reported that the Chinese have taken a strong interest in Australian alcohol, in particular, Tasmanian whisky (Wilson 2019). Visiting cellar doors were common, and they were catering to an increasing number of Chinese tourists. Riversdale Estate Vineyard, for instance, has its own WeChat official account. These activities slowed during the pandemic.

Tasmania has a global education strategy (Department of State Growth 2017; 2019). Besides supporting industry, education is seen to contribute to building an international profile for the state (or public diplomacy) and to tourism. In 2018, there were 5456 Chinese students enrolled in Tasmania's education system, comprising approximately 40 per cent of the state's total overseas student enrolments (Killick and Richards 2019). International students attract visits from friends and family. The pandemic – again – slowed the growth of all international students, including those from China.

Summary Table

Questions	Destination: Tasmania
RQ1a Successful strategies	• The use of some influencers and celebrities. • Promotion targeted at China.
RQ1b Serving the specific needs of Chinese visitors	• Mandarin speaking park rangers. • More seats provided by airlines. • Restaurants offer Chinese menus. • Using Chinese-recognised icon for road safety campaign.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• There is no proactive strategy. • Both positive and negative stories are found in the media.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	• Most Chinese have not heard of Tasmania. • Tasmania promotes its clean air and water, and nature. These tie closely to the quality produce from here. Whether consumers know that the products are Tasmanian or just Australian is unclear. • It is unclear if the "Tasmanian" brand matters more than the "Australian" brand.
RQ2b How tourism is used to affirm bilateral ties	• Tourism is represented and promoted with other industries through trade missions. • President Xi's visit to Tasmania has spurred Chinese visitor numbers and is used to affirm the two country's bilateral relations. • Tasmania has attracted Chinese investments, but tourism is not part of the charm offensive.

Appendix A7. Victoria

Professor Joseph M. Cheer

Background and Context:

Tourism in the state of Victoria continues to thrive leveraging its key attributes that include a comprehensive calendar of special events (cultural and sporting), extensive MICE capacity, longstanding reputation as Australia's foodie capital, hub for international education with its plethora of universities and the diversity of regional tourism offerings.

Melbourne, the gateway city to Victoria continues to get the lion's share of international visitation and the challenges of dispersing visitors beyond Melbourne and encouraging overnight stay in regional destination remains constrained on account of tourism supply chain issues public transport connectivity, diversity, and cost competitiveness of accommodation.

The capital city's tourism product depth is led by the National Gallery of Victoria, Melbourne Museum, Crown Casino, Queen Victoria Market, Royal Botanical Gardens, Eureka Skydeck, Yarra River, China Town, Melbourne Cricket Ground and Olympics precinct, inner city lifestyle hubs such as Fitzroy, Collingwood and South Yarra, and the vibrant culinary scene underlined by the many world class restaurants present.

Beyond Melbourne, the key regions for international visitation are dominated by iconic attractions including the Twelve Apostles and Great Ocean Road, Philip Island Penguin Parade, Yarra Valley wineries, beaches of the Mornington Peninsula, Sovereign Hill and the many national parks scattered across the state. However, one of the state's strong suit remains its status as the event state with a yearlong calendar of events that includes the Australian Open, followed by the Australian Formula One Grand Prix, Australian Football League (March to September), and a procession of other events including Melbourne Food & Wine Festival, Melbourne Festival, Melbourne International Film Festival, Melbourne Comedy Festival, Melbourne Fashion Festival (Spring and Autumn), Melbourne Spring Racing Carnival, and exclusive stage shows including Harry Potter, among others.

Status Quo:

The state of Victoria continues to increase sustained tourism growth where at the end of June 2019, international tourist visitation maintained an upward trajectory. On the three criteria for outlining international visitation, international visitor spend was $8.6 billion, international visitor numbers at 3.1 million and international visitor nights of 72.9 million (Figure 1).

Figure 1 International visitation as at year ending June 2019 (Tourism Victoria, 2017).

Key highlights for the year ending June 2019 include (Tourism Victoria 2019):

- International expenditure in Victoria continued to increase at a solid rate of 7.1 per cent to reach $8.6 billion in the year ending June 2019. Over this time Victoria exceeded the national growth rate for spend (+5.4 per cent).
- Victoria experienced year-on-year growth in international visitors to reach 3.1 million (+4.3 per cent), above a softer performance nationally (+2.8 per cent).
- Melbourne experienced solid growth in international spend (+7.0 per cent) to reach $8.0 billion, outperforming the national capital cities average (+5.0 per cent).
- International spend in regional Victoria increased by 7.6 per cent to $600 million, just below the national regional average growth rate (+7.8 per cent). International overnight visitors to regional Victoria increased at a double-digit pace of 11.9 per cent year-on-year to reach 593,800, almost triple the growth rate for regional Australia overall (+4.1 per cent). Growth in regional visitors was driven by both Eastern (+18.5 per cent) and Western markets (+10.0 per cent).
- Double-digit increases in spend were recorded from India (+23.2 per cent), Taiwan (+21.5 per cent) as well as the USA (+16.2 per cent), with Singapore also recording strong growth (+10.4 per cent). Growth from China was solid (+7.2 per cent), although was at a softer pace than experienced in previous years. Spend from New Zealand visitors (-7.2 per cent) continued to decline, and the market has now dropped below the UK from fourth to fifth place in terms of contribution to total international spend.

At a glance, international visitation overall to Victoria is vibrant and it remains "an important driver of Victoria's economy. $8.6 billion was spent by 3.1 million international overnight visitors to Victoria in the year ending June 2019 (with growth of +7.1 per cent and +4.3 per cent year-on-year respectively). $8.0 billion was spent by overnight visitors in Melbourne and $600 million spent by overnight visitors in regional Victoria. International overnight expenditure in Victoria has grown by 12.2 per cent per annum over the last five years" (Tourism Victoria 2019) (Figure 2).

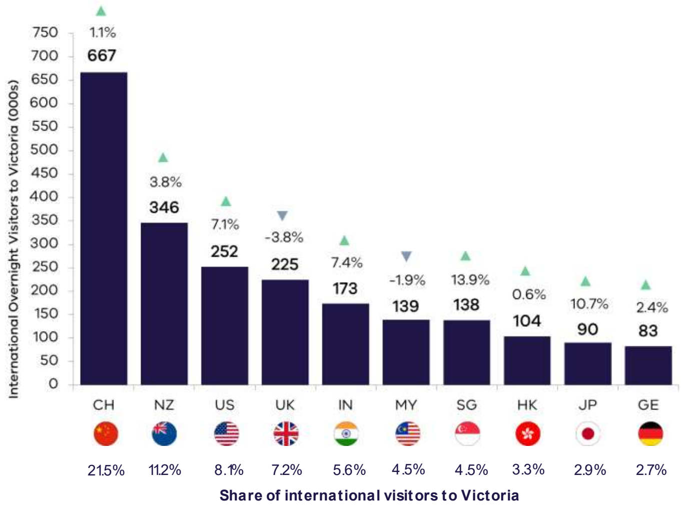


Figure 2: International overnight visitors to end June 2019 (Tourism Victoria, 2019)

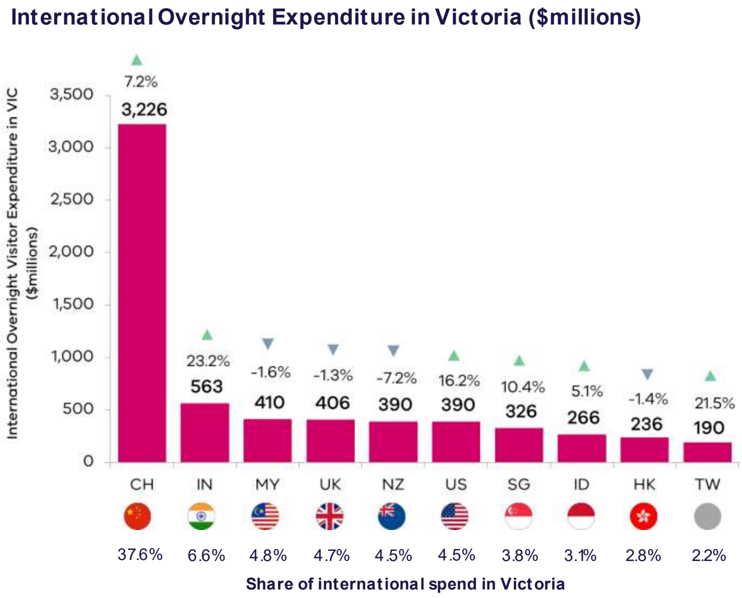


Figure 3: International overnight expenditure to end June 2019 (Tourism Victoria, 2019)

What is clear is that Chinese inbound visitors dominate visitation with over 1 in 5 international visitors and making up nearly 40% of overall international visitor expenditure (Figure 3). In sum, "China is Victoria's number one source market for international visitors and tourism expenditure. In the year ending June 2019, 666,600 international overnight visitors from China stayed 18.9 million nights in Victoria and spent $3.2 billion. $3.1 billion was spent by Chinese overnight visitors in Melbourne and $87 million was spent by Chinese overnight visitors in regional Victoria. Spend from Chinese visitors to Victoria has grown by 20.5 per cent per annum over the last five years (Tourism Victoria, 2019).

When it comes to the extent to which international visitors disperse beyond the capital city gateway, the intensity of Chinese visitation drops off somewhat.

According to Tourism Victoria (2019) "Regional Victoria's top 10 international source markets varies from that for Victoria overall, as visitors from different markets disperse and stay overnight outside of Melbourne at different rates. Western markets such as the United Kingdom and New Zealand move up in importance for tourism expenditure in regional Victoria, as do European markets like Germany, while other markets such as India and Malaysia move down in ranking as visitors from these markets are less likely to stay overnight in regional Victoria."

In sum, the ability for regional destinations to extract a greater proportion of international tourist spend remains constrained with less than one tenth of every dollar spent finding its way to a destination beyond Melbourne (Figure 4).

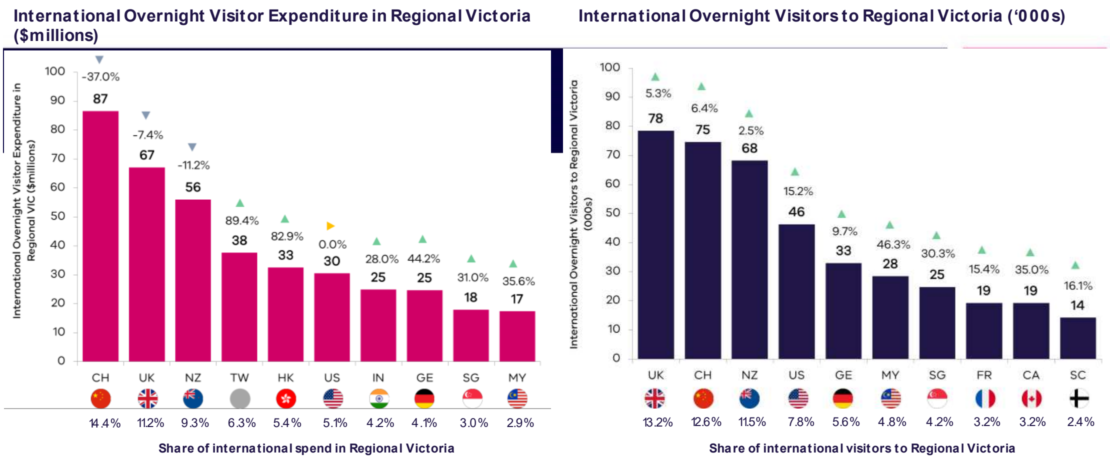


Figure 4: International expenditure and visitation to regional Victoria (Tourism Victoria, 2019)

Chinese Visitation to Victoria:

Regarding Chinese inbound tourism visitation, strong growth continues to underline the status quo. Much of this is buttressed by the increase in the number of flights arriving from Mainland China with longstanding airlines such as China Southern, China Eastern, Air China increasing schedules as well as newer airlines beyond Chinese Tier 1 cities including Hainan Airlines and Szechuan Airlines among others.

Without question, the state's strong growth in attracting Chinese international students to Melbourne has been helped by the city's collection of world-class universities, especially the University of Melbourne. This has meant that the potential for visiting friends and relatives (VFR) tourism out of China has strengthened, with flow on effects as seen in the post-study immigration to the country.

According to Tourism Victoria (2017), at the end of 2017, Chinese inbound visitation exemplified the strong growth that the state has experienced over preceding year.

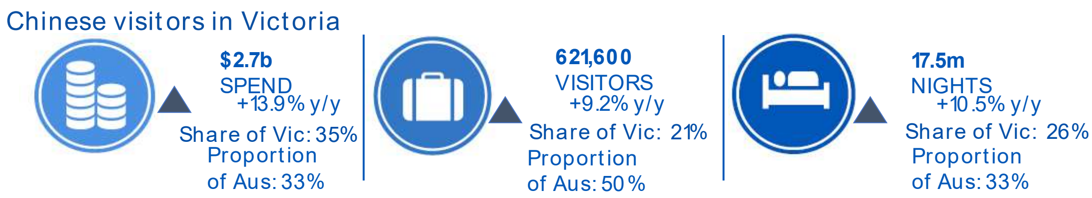


Figure 5: Chinese Visitation highlights at end 2017 (Tourism Victoria, 2017)

Tourism Victoria (2017) forecasts for Chinese inbound visitation forecasts the market to be valued at "$7.0 billion in 2026-27 (+10.3% p.a.) and contribute 39 per cent to total expenditure in Victoria. Growth in spend by Chinese visitors in Victoria is estimated to represent 57 per cent of the increase in international spend over the next ten years" (Figure 5).

Moreover, Tourism Victoria highlights that "Chinese visitors to Australia are forecast to grow by 11.9 per cent per annum over the next ten years, to represent 35 per cent of total international visitors by 2026-27. Over the forecast period, Holiday visitors from China are expected to grow at a faster rate (+14.1% p.a.) than other purpose segments and increase their share by 12 percentage points to 68 per cent" (Figure 6).

Insofar as the profile of Chinese visitors to the state, this is dominated by holiday, VFR, and Education motivations with the age profile of visitors aligning with visitation by family members of Chinese international students' resident in Melbourne.

More recently, strong shifts away from traditional group travel toward fully independent travel is taking place

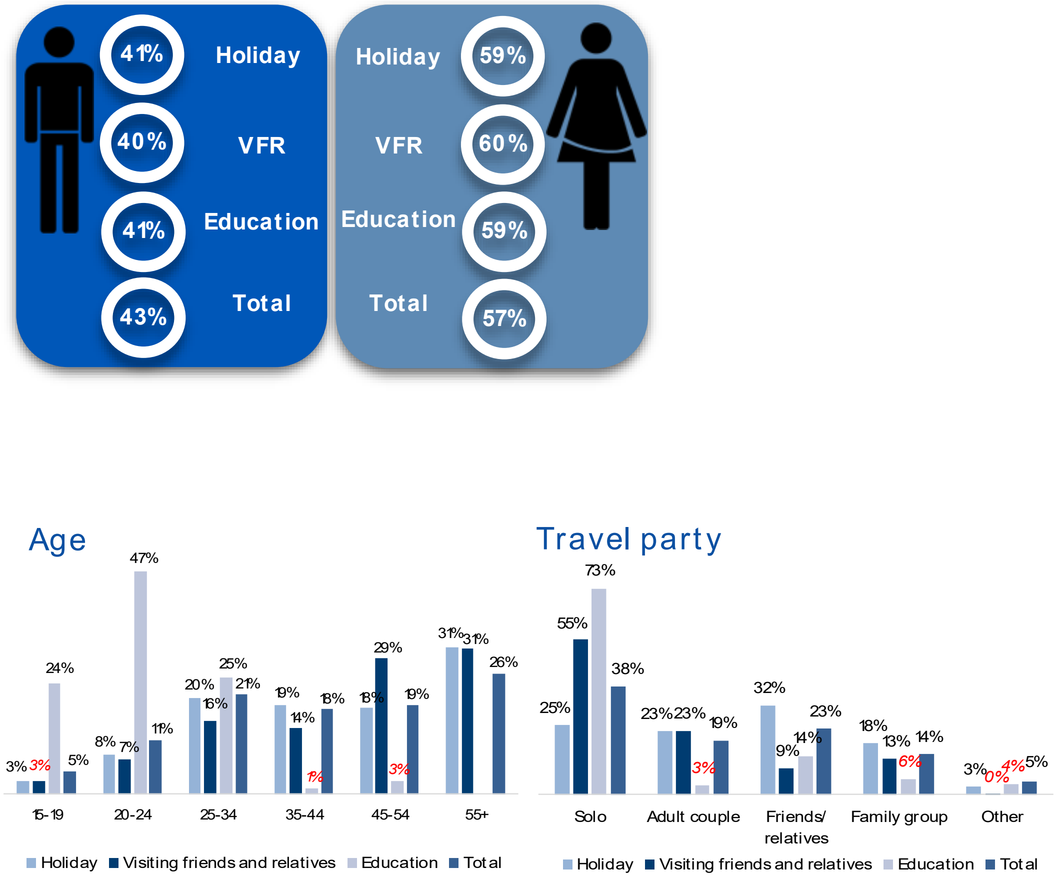


Figure 6: Profile of Chinese Overnight Visitors to Victoria (Tourism Victoria, 2017)

According to Tourism Research Australia (2017) China and India have become the two largest source markets for international visitors to Victoria. Key highlights show:

- The highest volume of international overnight VFR visitors to Victoria from Asia were from the key growth markets of China (85,600) and India (49,900), with double digit average annual growth since year ending December 2011.

In their research of the Chinese inbound visitor market, market profiles emphasise the overall youthfulness of visitor hosts with strong links to international study and/or business and visiting friends and relatives (Figure 7; Figure 8).

CHINESE

Chinese hosts were:

- generally younger (45% aged under 30)
- either single or in a couple without children (47%)
- mostly working full time (62%)
- originally came to Victoria to study (45%); for business/work (24%); or to visit family (21%)
- now permanent residents (43%) or citizens (35%)
- living in Australia for one to five years (32%), with a further 61% having been here for six years or more
- planning to stay in Australia indefinitely or permanently (67%).

Chinese visitors:

- were older than their hosts (63% aged 30–44)
- had young children at home (57% with one child under the age of 10)
- were working full time (94%)
- were well-travelled, with 68% having previously been to Europe, 55% having been elsewhere in Asia, and 52% having been to North America.

Figure 7: Profile of Chinese visitors to Victoria (Tourism Research Australia, 2017)

CHINESE

- To Chinese hosts, it is an honour and privilege to be able to show hospitality to one's family, especially aging parents who have worked hard and sacrificed material comforts for themselves to give their children a better life abroad.

> "Of course I'm very happy when my parents visit me here. It's part of our Chinese culture, our family is very close and we love spending time together."

- For Chinese visitors, immediate family members and close friends are expected to stay with the host, in the host's home. Distant relatives or friends will seek the host's preference whether they should stay in a hotel or with the host.
- Chinese visitors mainly came to Victoria for a holiday (67%); to see friends (66%); and to see family (63%)*.
- Chinese visitors consider travel to be a status symbol, and they want their friends and family to know they have travelled to Australia/Victoria, and have ticked items off their 'bucket list'. There was also a number of Chinese visitors who were travelling for the purpose of reconnaissance should they eventually migrate here.

Figure 8: Motivations of Chinese visitors to Victoria (Tourism Research Australia, 2017)

Chinese Visitation in the Media

A meta-analysis of mainstream media commentary of Chinese inbound tourism to Victoria highlights that for the most part, there is a general acceptance of their presence.

In general, the following key themes relating to Chinese inbound tourists has tended to predominate:

- Chinese visitors and expenditure, and their worth to the Victorian economy
- Chinese inbound tourist travel experience in the state, especially Chinese tourists in the city
- Changing patterns of tourist behaviour from group travel to more fully independent travel
- Problems with Chinese inbound visitors especially those who are self-drive and their lack of familiarity with Australian road conditions

Managing Sentiments Toward Chinese Tourists

Critical in the wider attempt to build Chinese inbound tourist visitation, is the handling of delicate sentiment analysis in the wider public discourse. As the Australia-China bilateral relationship has waned, this inevitably has a ripple effect on attitudes towards tourists from that country. Notwithstanding, there is little evidence to suggest that the Victorian tourism industry was undertaking queries into public sentiments towards Chinese tourists in the state.

Chinese Tourism and International Business Relations

The links between Chinese inbound tourism and international business relations between Victoria and China is driven by initiatives such as the City of Melbourne's sister city links with Tianjin, and Victoria's sister state relationship with Jiangsu Province. Also INVEST VICTORIA, the state government's key agency for international investment attraction maintains offices in Shanghai, Beijing, Nanjing, Chengdu, and Hong Kong. Collectively this works in tandem with the state's popularity with Chinese international students and the links to VFR tourism.

Conclusion

Chinese inbound visitation to Victoria remains strong with obvious links to Chinese international students as exemplified by the strong motivations for visit tied to the presence of friends and relative's resident in the city. Moreover, the market has now become the largest source of international tourists and more than double that of the second largest source market, India.

Overall, most Chinese inbound tourists tended to spend the majority of their time with their hosts within the Melbourne metropolitan area and where trips to regional Victoria were taken, this was often as a day trip rather than as an overnight stay.

While overarching geopolitical discourses concerning China's contested international relations with Australia, there is little evidence that this is shaping attitudes towards Chinese inbound tourists to the state.

Appendix A8. Western Australia

Dr Oscar Vorobjovas-Pinta

Introduction

a. Overview of tourism in the destination

Tourism is considered one of the key economic drivers in Western Australia (WA). Tourism generates 108,800 jobs and injects $12.9 billion into the West Australian economy by Gross State Product. The industry employs 73,200 people directly and additional 35,600 indirectly, which accounts to 8.2% of WA's employment in total (Tourism WA 2019a). Tourism (directly and indirectly) is the fourth largest sector in terms of employment; however, it lags behind considerably in terms of the total share of WA's Gross Value Added (GVA) – 4.6%. In comparison mining accounts to 31.5% and construction accounts to 8.5% of the total GVA.

Intrastate travellers (58%) dominate tourism in WA, whereas interstate visitors account to 26% and international to 16% (Tourism WA 2019b). In the 2017-2018 State Budget, Government committed to tourism $425 million over five years. The plan mainly focuses on the transformation of Perth as a tourist hub, where funding is invested in sport and entertainment infrastructure (e.g., Optus Stadium), new hotels (e.g., Ritz-Carlton Perth), new flight routes (e.g., Shanghai and Tokyo), and hosting major trade events (Tourism WA 2017). WA aims to position themselves as an affordable and vibrant Australia's western gateway. Tourism WA is also focusing on attracting more tourists to regional areas.

b. Tourism numbers, Chinese tourism numbers, projection

In year ending June 2019, WA attracted over 5.7 million overnight visitors, of which 4.8 million were domestic and 924,000 were international visitors. The overall number of visitors to the state increased by 12.3% in comparison to the same period in 2018. Despite the growth in the visitor numbers, they spent 2.4% fewer nights in WA in comparison to the previous year. This trend is also observed across the international visitation numbers. In this regard, WA saw a growth of 3.2% to 973,100 international visitors, while total nights declined by 10.9% to 23.8 million nights. Tourism WA distinguishes international visitors to four categories by purpose of travel: holiday, visiting friends and relatives (VFR), business, and education. The number of the international holiday visitors reached 506,300, which is the largest number of international holiday visitors WA has ever seen, growing 12.8% compared to the previous year. On the other hand, numbers of VFR, business and education visitors has declined, with VFR visitors dropping by 5.4%. Tourism WA (2019c) suggests WA's economic conditions are to blame for the decline. The total expenditure of visitors to WA increased by 7.9% from $3,955 million to $4,267 million. Whilst the growth in international tourist numbers increased by 3.6%, they spent 13.6% fewer nights in WA. International visitors also spent 2.5% less money in comparison to the same period in 2018.

In the year ending June 2019, WA saw a growth in visitor number from seven markets in which Tourism WA is active: Singapore (+7.6%), New Zealand (+12.2%), China (+11.3%), Indonesia (+7.4%), India (+11.1%), Japan (+5.6%), Hong Kong (+17.9%) and Switzerland (+7.3%) (Tourism WA, 2019c). In June 2018 – June 2019, WA attracted 66,700 Chinese visitors (Tourism WA 2019d), 72% (41,800) of these visitors were holidaymakers. Tourism WA identifies the Chinese visitor market as a priority market due to its high yield (Carcausto Zea 2018). Although China ranks number 5 by the total number of visitors, it remains WA's largest international market by total visitor spend, despite a decline in spend when compared to the same period in 2018; it decreased by 6.7% to $280 million (Tourism WA 2019c). $74.9 million spent by Chinese holiday visitors, which averages to $79 daily spend. Chinese holiday makers stay on average 23 nights in the state. In 2018, Bankwest Curtin Economics Centre found that Chinese visitors are young, and they have a significant amount of money to spend – 75% of Chinese visitors to Western Australia are aged 20 to 40 years, and they spend on average almost $500 per night when they stay in Australia (Analysis & Policy Observatory 2018).

Due to the outbreak of Covid-19 Australia has closed its borders in March 2020. Western Australia's tourism industry has been hit by mass cancellations of Chinese tourists because of the pandemic, which in some places has resulted in layoffs (O'Connor 2020). There are no data pertaining to the number of Chinese visitors to WA since early 2020; however, this number would be negligible, for example, in the year ending March 2021, WA welcomed only 8,900 visitors (Tourism WA 2021). This is a 99.1% decrease in comparison to the same period a year earlier. Due to the outbreak of the pandemic, Tourism WA has paused all their international familiarisation programs. While WA continues to think positively in terms of attracting Chinese tourists post-pandemic (Huang et al. 2020), it is prudent that the state government does not rely solely on one market (e.g., China) at the expense of other potential tourism markets. The ongoing political tensions between Australia and China also pose a barrier for WA's future tourism recovery (Chalmers 2021).

c. Official and industry emphasis on Chinese tourism in relation to others

Tourism WA has been seeking to grow the Chinese market to WA since 2011 (Tourism WA 2011). Tourism WA and the state has acknowledged that a significant growth in the China market necessitates a clearer understanding of the requirements of the Chinese visitors. Tourism Council Western Australia is running the China Ready Accreditation program and workshops to help businesses become ready for this growing market. The program itself is part of a global accreditation system CHINA READY® and is intended for businesses targeting the free and independent Chinese traveller. This is pertinent in WA as 98% of Chinese leisure visitors to WA are free independent travellers (Tourism WA 2019d). In comparison, Chinese leisure visitors to the rest of Australia are much more likely to be on a group tour and only 66% are free independent travellers (Tourism Research Australia 2019).

Figure 1: China Ready & Accredited logo

Tourism WA's 'Two Year Action Plan for Tourism Western Australia – 2018 and 2019' emphasises the need to grow tourism in WA by focusing on Asian markets, including China (Tourism WA 2017). Furthermore, in line with the National Long Term Tourism Strategy (Tourism 2020) and the China 2020 Plan, Tourism WA has identified a long-term goal for 2020. Tourism WA aims to grow Chinese visitors to 100,000 and Chinese visitor to spend $500 million by 2020 (Tourism WA 2017). In particular, there is an emphasis on opening a second direct flight to/from China and exploring further route options. Currently, China Southern Airlines are operating flights to/from Guangzhou. As per Tourism WA strategic plan, the second direct route will be operated by China Eastern Airlines to/from Shanghai-Pudong from 15 January 2020 (Butterly 2019). Interestingly, it has been identified that Beijing was the most popular point of origin for visitors from China, however there are no direct flights between Beijing and Perth (Bankwest Curtin Economics Centre 2018).

d. Broad understanding of what matters to Chinese tourists (e.g., making it easy to visit, catering to their cultural norms, pricing)

Chinese leisure visitors to WA primarily visit Perth and its surroundings (97%) and only 27% of them spend at least one night in regional WA (Tourism WA 2019d). Australia's Southwest, where Margaret River is situated, is the second most popular tourist region (18%). Australia's Coral Coast was visited by 13%, Australia's Golden Outback – 7% and Australia's Northwest – 0% (Tourism WA 2019d).

Xia et al. (2018) have identified limited business trading hours, internet access and language as the biggest barriers in WA. The barriers are further intensified as Chinese tourists in WA are generally younger and have more money and are willing to spend their money.

WA shares the same time zone as all of China, however the studies have shown that visitors were not aware of this before making their booking (Xia et al. 2018).

WA also suffers from the reputation as an expensive destination. This image was created during the mining boom, and it is suggested that WA's poor tourism figure could be due in part to the post-mining-boom economic slump (Collard 2018).

RQ 1a. Looking at how your destination attracts diverse Chinese tourists and identify the main success factors. Provide context (e.g., diversification of economy, focus on nature-based attractions, easily accessible, visa, language).

Zea et al. (2018) explains that there is very scant understanding and not enough information about Chinese independent travel in WA, which makes it difficult to understand where they go and what services, types of accommodation and experiences they seek. It should be noted that there is limited information in WA media about Chinese tourists in WA. Majority of the information about Chinese tourists in WA is presented in a statistical manner and there is limited research exploring the Chinese visitor perceptions of WA.

Chinese visitors perceive WA as a destination that has an unpolluted environment and distinctive flora and fauna (Xie et al. 2018). Furthermore, the visitors come to WA to experience the natural beauty of the coast and inland regions. This is reflected in the Tourism WA China Market Profile 2018, which indicates that the most appealing destinations in WA were Perth (26%), Rottnest Island (18%), Margaret River (13%), Ningaloo Reef (12%), Broome (12%), Esperance (11%) and Kimberley (8%).

Food, wine, and craft beer tourism is increasingly popular amongst younger – 20-40-year-old – Chinese visitors. In particular the wine regions such as Margaret River and Swan Valley are benefitting from increased Chinese tourism visitation (Wang 2017). In fact, Margaret River wines are so popular amongst the Chinese visitors, that they have opened their first wine store in Guangdong province, China (Fraser 2017). Wen (2019) suggests that craft beer is an example of a luxury product that could be used to lure Chinese tourists to WA. Indeed, WA appeals to Chinese travellers coming from more affluent backgrounds (Acott 2017).

In January 2019, it was announced that a Chinese reality romance show with hundreds of millions of viewers is being filmed in Busselton, WA (around 200km from Perth). This was seen as an opportunity to capitalise on film tourism and attract more Chinese into regional WA. It appears that members of WA's Chinese Australian business community helped to convince producers to choose Perth and the Southwest WA over the higher profile tourism destination of Queensland (Loney and Lynch 2019). This suggests that expats from China might play a key role in attracting more tourists to WA.

Another regional WA city, Geraldton, is targeting the Chinese tourism market by accommodating school groups who come to see the region's natural sights and attractions. One of such trips has been led by two popular Beijing television presenters, who gave formal lessons to the children about Australia (Meachim 2018). This could suggest that education tourism could also go beyond the provision of tertiary education and expand into the secondary education segment.

The report by Xie et al. (2018) indicated that whilst the WA Government is focusing on attracting new flight routes to China, Perth International Airport was not as welcoming or usable as other airports through which they had passed.

RQ 1b. Examine how the DMO and some businesses in your destination cater to the needs of Chinese tourists and evaluate their successes and failures. Provide context.

China is seen as an important market for the state government, and this is reflected in their commitment to strengthen awareness of WA as a must-see holiday destination and bring in more visitors (WA Government 2019). In 2018, Tourism WA was allocated by WA government additional $1 million to advance the Chinese market. In light of the new flights to Shanghai-Pudong in January 2020, WA Government is prioritising on building consumer awareness of Western Australia in Shanghai (Government of WA 2018b). Both industry and government have taken specific steps to grow this lucrative market (Acott 2018; Carcausto Zea 2018):

- Direct marketing events in China;
- 'Welcome' and familiarisation visits to WA;
- Arranging training and information tools for WA tourism businesses;
- Developing a Chinese holiday planner in Mandarin;
- Developing day tours around Perth delivered by a professional Chinese-speaking guide;
- Opening shops selling WA produce in key Chinese cities; and
- Developing a travel planning smartphone app in Mandarin.

In 2018, Tourism WA ran a new marketing strategy that included a co-operative and tactical campaigns to build awareness of WA as a tourist destination within the Chinese market (Pilat 2018). Tourism WA has acknowledged the importance of the growing Chinese tourist market in WA as China is the state's biggest international visitor market in terms of spend. Tourism WA and the government particularly emphasises the importance of the direct flights to WA as it would further improve the connectivity and help boost economy.

RQ 1c. Investigate how sentiments towards Chinese tourists are managed (or not managed) in your destination by the DMO/peak body/businesses. Provide context.

There is no hard evidence that would suggest whether sentiments towards Chinese tourists are being managed. The general message from the individual tourism operators is that there might be too much hype and focus on the Chinese tourism market overall, instead tourism operators should be focusing on other international markets (Mann 2019). The parallels are being drawn from the mistakes Queensland made when a decade ago it predominantly focused on the Japanese market and then the boom stopped.

The sentiment towards the Chinese tourists is potentially indirectly affected by the Chinese politics and its influence in the mining sector in WA. It is suggested that WA is more exposed than most other states because of our reliance on China for our iron ore exports. However, WA does not enjoy the same number of Chinese international students as Australia's eastern states (Loomes 2019; O'Flaherty 2019).

RQ 2a. Examine how your state/country has successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies. Provide context.

Awareness of the WA's landscapes and experiences was relatively low among Chinese travellers. Some tour operators suggest that many Chinese tourists look past WA to the eastern states because of a lack of promotion (Messurier 2016). The lack of adequate promotion has been also acknowledged by a senior Tourism WA official stating that other states are better at promoting themselves (Collard 2018).

Whilst promotion of WA remains somewhat fractured, Tourism WA developed a range of online tools for WA businesses to help make the most of online marketing opportunities and attract more Chinese tourists. In addition, Tourism WA has developed a consumer website promoting Western Australia to the Chinese market (e.g., www.westernaustralia.com/cn).

In 2019, it was announced that Tourism WA will enter into a partnership with AirAsia and Singapore Airlines Group to arrange joint marketing campaigns to promote Western Australia's tourism highlights to the Chinese, Malaysian, Indian, German, Swiss, Indonesian, Singaporean, UK, US and Japanese markets (Paddenburg 2019).

Xie et al. (2018) suggests that Chinese tourists perceive Perth as a unique and unlike other cities in China. Perth is known for three features: *The City of Isolation* (alluding to its reputation as the most geographically isolated capital city in the world), *The City of Swans* and *The City of Lights*. The same report by Xie et al. (2018) explains that WA is not China-ready and there are several barriers to it. The main barriers are:

- The lack of Chinese speaking staff,
- Low levels of ITC competency,
- Low numbers of Chinese tourism business networks,
- Limited understanding of the Chinese tourism market.

RQ 2b. Examine and evaluate how tourism is used by authorities in your state/country in their charm offensive strategies. Provide context.

WA's main trading partner is China since 2006-2007. Western Australia exported A$81.4 billion of goods to China in 2018-19, which accounted to 50% of the overall export. The top exports being iron ore, petroleum, gold, lithium, and nickel ore. China is Western Australia's largest export market for all of these commodities except for petroleum (ranked second). Western Australia is the largest source of iron ore for China (WA Government 2019).

Summary Table

Questions	Destination: WA
RQ1a Successful strategies	• Attracting direct flights (Shanghai-Pudong and Guangzhou). • Partnering with Singapore Airlines Group and AirAsia to jointly promote WA. • Association with a good image of WA wines. • Direct marketing events in China. • 'Welcome' and familiarisation visits to WA. • Arranging training and information tools for WA tourism businesses.
RQ1b Serving the specific needs of Chinese visitors	• Same time zone as China. • Developing a Chinese holiday planner in Mandarin. • Developing day tours around Perth delivered by a professional Chinese-speaking guide. • Developing a travel planning smartphone app in Mandarin.
RQ1c Strategies used to manage sentiments towards Chinese visitors	• There is no hard evidence to suggest such strategies exist. Sentiments about the Chinese tourists might be indirectly influence by politics and trade relationships.
RQ2a How has Chinese tourist experiences used to promote business and international relations?	• No clear strategy. • WA promotes its unpolluted environment, unique flora and fauna, and the natural beautify of the coast and inland regions. WA also promotes its wine and food as a luxury product.
RQ2b How tourism is used to affirm bilateral ties	• There is no hard evidence to suggest tourism is being used to affirm such ties.

Appendix B: Summary of Destination Comparisons

In this section, we summarise and highlight the salient comparative features of the different destinations. This allows the reader to do some quick comparisons and draw also lessons from specific destinations.

Table B1: The impact of Covid-19 on overseas Chinese tourism markets and responses.

Singapore	Cambodia	Malaysia
• Total visitor arrivals fell by 85.7%. • Total tourism receipts declined by 78.4%. • DMO providing programs and products. • Launched CruiseSafe Certificate and relaunched SingapoRediscovers vouchers. • Visitors from mainland China could enter Singapore without quarantine since November 2020.	• Chinese visitor numbers declined by 90.8%. • Total travel ban to and from Sihanoukville, the major business and holiday destination for Chinese visitors. • 3000 hospitality businesses closed. • 750,000 jobs lost. • Interprovincial travel ban lifted on 25 April 2021. • Five-year tourism roadmap introduced.	• Total tourist arrives declined by 83.4%. • Trade between Malaysia and China increased. • China donating vaccines to Malaysia.

Singapore context: Singapore had a major decline in visitor arrivals and spending. Chinese arrivals declined from 3,627,120 in 2019 to 357,292 in 2020, of which 329,047 arrivals were in January before China restricted boarder travel (Singstat 2021). The DMO responded by providing and encouraging programs and products which prepare tourism providers to operate during the pandemic and in the promotion of domestic tourism, examples of which are the world's first Covid-19 ready cruise and relaunched domestic attraction and offers vouchers. Although current policies have relaxed restrictions and allowed visitors from Mainland China to enter Singapore without any quarantine since November 2020, tourism arrivals remain low from November 2020 to May 2021 at 48,097 in seven months (Singstat 2021).

Cambodia context: Due to travel restrictions, closures of tourist resorts interprovincial travel bans, and lockdowns, Cambodia's tourism and hospitality sector has collapsed, with the tourism sector suffering a loss of $5 billion in revenue in 2020 (PPP 2021a). Chinese visitor numbers were only 23,837, a 90.8% decline, in the first quarter of 2021. With the lift of the interprovincial travel ban on April 25 there was a marked rebound for domestic tourism. The government aims to open the country for international travel in the fourth quarter of 2021 and has launched a five-year tourism roadmap, which is tailormade for Chinese visitors and expected resolve many challenges, including the spread of Covid-19 (PPP 2020).

Malaysia context: With the major drop in tourist numbers, less than 0.41 million Chinese tourists visited Malaysia in 2020 (Tourism Malaysia 2020). Regardless of the adverse impacts of Covid-19, trade with China grew by 4.2% in 2020 compared with 2019 (MITI 2021). There have been some negative sentiments towards Chinese tourists due to Covid-19, but China has been donating vaccines to Malaysia, which could mitigate negative perceptions (NST 2021). It is anticipated that Chinese tourists will lead the way once more in Malaysia.

Table B2: The impact of Covid-19 on Australian Chinese tourism markets and responses.

Tasmania	NSW	QLD	VIC	Western Australia
• 74% decrease in Chinese visitor numbers.	• 99.1% reduction of international visitors. • Sydney economy suffered worse than regional NSW. • Sydney decline of visitor numbers (59.9%), nights (55.8%), and expenditure (69.5%).	• Sharp decline of Chinese visitors and expenditure. • Queens Wharf development. • Asserting the importance of adequate Chinese language and cultural skills post Covid. • Investors still welcomed despite political tensions.	• Drop off in visitation resulting in economic impacts.	• 99.1% decrease in visitors to the state. • Chinese tourist cancellations. • Paused international familiarisation programs.

Tasmania context: It has been noted that in December 2019, prior to the outbreak of Covid-19, there had been a 19% decrease in the number of Chinese visitors to the state compared to the previous year (Tourism Tasmania 2020b: 5). The number of Chinese visitors to Tasmania in 2020 decreased to 11,200 over the 42,700 from 2019 (Tourism Tasmania 2021). There have been some international visitors still travelling Australia that may visit Tasmania, although international leisure travel is yet to resume (Tourism Tasmania 2021).

New South Wales context: Prior to the emergence of Covid-19 NSW was the most visited state in Australia by people from China. The significant negative economic impacts on Sydney's visitor economy during the Covid-19 pandemic served to highlight the important contribution of international visitors to the NSW tourist economy, especially those visiting from China. While the political relations between Australia and China have become increasingly strained during the Covid-19 pandemic, there is a continued emphasis on the importance of Chinese visitors for growth of the NSW tourist economy (Norris 2021).

Queensland context: The closure of Australia's border due to the Covid-19 pandemic has inevitably resulted in the sharp decline of Chinese visitor numbers by 89.1% and expenditure by 80.7%, which are higher than the national average at 86.1% and 77.7% respectively (Tourism and Events, Queensland 2020). The construction of Queens Wharf, a major tourism development underway in Brisbane, is anticipated to be a timely drawcard post-Covid for Chinese visitors (Knowles 2021). The Chinese Language Teachers Association have highlighted the importance of adequate Chinese language and cultural skills in post-Covid-19 tourism recovery and engagement and encourage tourism operators to learn basic Chinese to attract Chinese FITs (Moss 2021).

Victoria context: The extent to which Chinese tourists have helped bolster the Victorian economy and broader community because of national border closure can be exemplified by the broader impact on the national economy. International overnight visitors to Victoria spent an estimated $8.1 billion in the year ending March 2019 – Chinese tourists in the state spent an estimated $2.9 billion, 35.2% of total spending (Invest Victoria 2021).

Western Australia context: As a result of border closures due to the pandemic there were numerous cancellations from Chinese tourists, resulting in layoffs in some places (O'Conner 2020). While WA continues to think positively in terms of attracting Chinese tourists post-pandemic (Huang et al. 2020), it is prudent that the state government does not rely solely on one market (e.g., China) at the expense of other potential tourism markets. Ongoing political tensions between Australia and China also pose a barrier for WA's future tourism recovery (Chalmers 2021).

Table B3: How destinations attract diverse Chinese tourists and identify the main success factors in each destination.

Singapore	Cambodia	Malaysia
• Marketing beyond the main cities. • Airport connections to secondary cities in China and as a stopover destination. • Successful also in using corporates such as Alipay and WeChat pay to attract Chinese tourists to malls. • Creating the 'Singapore Passion Ambassador Campaign'. • Chinese tourists are also convinced of Singapore's hub status in Southeast Asia. • Majority of the population has Chinese heritage. • Food souvenir industry.	• Improved accessibility of Cambodia's key attractions (new airports, increased number of flights to more locations in China). • Improved in-land connectivity. • Use of Chinese language (signage, tour guides). • Usage of the Chinese currency. • Easy access to visa processing. • Restaurants and shops catering to Chinese tastes. • Clean and green campaigns.	• Maintaining smooth political relations with China. • Organize Malaysia-China cultural tourism year in 2020, with Chinese government support. • Simplify visa application process. • Improve air connectivity with China, especially 2nd and 3rd tier cities.

Singapore context: There is a need to go beyond the first-tier cities by attracting not just middle-class tourists from first-tier cities but also those from second and third-tier ones as competition for these source cities are stiff and the rate of revisits are not sufficient to sustain tourist numbers. Industry experts have noted that the appeal of Singapore to Chinese tourists has evolved beyond that of a shopping and sightseeing destination, offer a chance to learn about the local heritage and culture. Integrating technologies Chinese tourists are familiar with eases their travel logistics and increases their consumption. The 'Singapore Passion Ambassador campaign' provides three types of personalised traveller itineraries – the foodie, collector, and explorer – through Alipay merchants for sponsored Chinese 'ambassadors' selected from a pool of high-tier Alipay members. Singapore promotes itself as a stopover or as part of a broader package (e.g., Singapore-Malaysia- Thailand route, or stopover to Indonesia or Australia) going beyond Singapore's limited physical size by positioning Singapore as a gateway to Southeast Asia.

Cambodian context: The measures utilised in Cambodia originate from the China Ready initiative which is supported by CHINA READY[R], a Chinese government and industry-endorsed service (PPP 2019). As Cambodia intends to utilize tourism growth to shift away from low-income and low-skilled garment manufacturing and reach the status of upper-middle-income country by 2030 (PPP 2018), it needs to: Diversify and innovate its stagnating tourism product; compensate for a declining Western tourism market; shift its tourism product to attract high-spending tourists; and improve its reputation from being a gambling destination to a clean & green image for special interest tourism. However, this initiative completely ignores the 'cultural accessibility' of Cambodia as it excludes local people from creating and managing the tourism product.

Malaysian context: Besides some common strategies (e.g., physical/cognitive/cultural accessibility), Malaysia emphasises keeping a smooth political relationship with the Chinese Government. China remains as Malaysia's top trading partner for ten consecutive years, and the largest investor in manufacturing industry for three consecutive years, which indicates that Malaysia's economy heavily replies on China (MIDA 2020). A solid political relationship is a foundation for economic cooperation between the two countries, and Malaysia could not afford having a sour relationship with China. There are many reverse cases on the negative impact resulting from soured bilateral relations.

Table B4: How destinations attract diverse Chinese tourists and identify the main success factors in each destination.

Tasmania	NSW	QLD	VIC	Western Australia
• The use of some influencers and celebrities. • Travel trade to China. • Focus on nature, food, and historic attraction.	• NSW has many iconic 'must-see' Australian attractions. • Sydney is a key gateway city for flights from China. • NSW has many highly regarded tertiary education institutions. • As a global city, Sydney attracts business visitation, which contributes toward the luxury tourism market. • Sydney has diverse shopping opportunities. • Social media and technology have been used effectively to attract visitors.	• Establish Queensland on Tour Great China mission for destination marketing and industry engagement. • Partner with Ctrip and WeChat to promote QLD. • Target on FITs and business travellers over group tours. • Increase direct flights and establish new air routes. • Investment in infrastructures.	• Chinese Lunar New Year – City of Melbourne developed a multi-pronged approach to creating and curating activities and special events. • Melbourne Museum themed exhibitions and special events. • Immerse visitors in the regional area and optimise the number of nights spent in Victoria. • Crown Casino themes events to capture and contain visitors in the City of Melbourne. • The states World class universities attracting Chinese students.	• Attracting direct flights (Shanghai-Pudong and Guangzhou). • Partnering with Singapore Airlines Group and AirAsia to jointly promote WA. • Association with a good image of WA wines. • Direct marketing events in China. • 'Welcome' and familiarisation visits to WA. • Arranging training and information tools for WA tourism businesses.

Tasmania context: Tasmania is relatively unknown and is not considered the first port-of-call for most Chinese visitors, though there has been an increase in the number of Chinese visitors due to formal and informal strategies. The use of celebrities to attract tourist attention to Tasmania has been a central strategy (Boscia 2018; Scutt 2018; Dang 2018). Rather than focus on the whole of China Tourism Tasmania put resources towards a targeted approach, marketing to Shanghai, Guangzhou, and Beijing, with gourmet, golf, and wilderness experiences as the main attractions (Fitzgerald 2017). The main attractions marketed in Tasmania are the islands natural beauty and environment, rich history and heritage, coastal scenery, and locally sourced and produced food. Chinese tourists have seen this as attractive, although there is a need for further investigation.

New South Wales context: NSW has been successful in attracting a large portion of total Chinese visitation and expenditure in Australia. NSW particularly is a mature destination with a diverse range of tourism offerings. These are "natural" advantages of Sydney as a global city with a pleasant year-round climate and access to the nature-based experiences of the state's geography. Chinese visitors with limited knowledge of Australia are drawn to famous landmarks and major attractions that surround Sydney (e.g., the Sydney Opera House, Sydney Harbour Bridge, and Bondi Beach) (Destination NSW 2015: 4). There are a diverse array of accommodation attraction, restaurant, tour, shopping, and service options that cater to various Chinese visitation market segments. Chinese social media platforms, such as WeChat and Weibo, have been particularly successful at attracting Chinese visitors to experiences and attractions (Koehn 2019; Pitt 2018a). Tourism also benefits from the education sector, which has a strong international reputation and ranking, attracting many and benefiting from Chinese students, in turn creating a strong VFR market which may encourage regional tourism.

Queensland context: The state government aims to position Queensland as the gateway of Australia for the Asian market. The state government fore grounds the important contributions of the Chinese market to QLD's economy and has had tourism agencies and operators travel to China to meet key trade partners to gain market insights. To promote QLD as a destination and to target on Chinese Free Independent Travellers (FITs) the 'City Experience Mini Program' within WeChat, and Australia's first Ctrip store at the Gold Coast Airport, have been opened (Queensland Government 2019c; Tourism and Events Queensland 2019c). High-yield markets have been targeted with personalised wellness and medical tourism experiences. To successfully attract Chinese visitors, it is recognised that investment in visitor infrastructure is required and is being made, particularly the upgrade and redevelopment of airports in gateway cities.

Victoria context: Strategies used aim to capture and contain visitation within the City of Melbourne and key attractions such as the Crown Casino. Crown Casino themes events including Hawkers Bazaar, Zodiac Spectacular, and Lion dancing featured strongly. These address some of the language and Chinese friendly issues that are vital for attracting Chinese tourists. Sovereign Hill capitalised on Chinese colonial heritage and runs cooperative events with the City of Ballarat. The aim is to immerse Chinese visitors into the region and optimise the number of nights spent in regional Victoria. Emphasise connectivity to Melbourne's Chinese community. The states world class universities, particularly the University of Melbourne, has aided in attracting Chinese international students.

Western Australia context: Visitors come to WA to experience the natural beauty of the coast and inland regions. Food, wine, and craft beer tourism is increasingly popular amongst Chinese visitors aged 20-40 years old, Margaret River wines having even opened a store in Guangdong province (Wang 2017). Film tourism and the education sector are also used to familiarise potential Chinese visitors with Australia (Meachim 2018). Whilst the WA government aims to attract new flight routes to China, changes would be needed as Perth International Airport has been noted to be not as welcoming or usable as others.

Table B5: How various businesses cater to the needs of Chinese tourists and evaluate their successes and failures.

Singapore	Cambodia	Malaysia
• Hotel staff taught Chinese etiquette. • Mandarin-speaking staff readily available. • Supporting Chinese travels in Singapore using Chinese programming and payment platforms. • Fliggy and Singapore airlines sharing miles system. • Chinese cuisine locally available. • Multi-year multi-entry visa. • Catering to high-tech AI that Chinese tourists are used to.	Private, mostly China-based and/or Chinese-owned companies provide: • Expansion of tourist infrastructure (hotels, real estate). • More and bigger casinos. • More and bigger shopping malls. • Incipient luxury resort development to cater for rich Chinese tourists	• Mandarin and other Chinese dialects are widely spoken. • To provide Chinese language services at major transportation hubs. • To adopt Alipay and WeChat Pay. • Chinese, localized Chinese, and global cuisines provided. • Telling of historic stories and connecting Malaysia and China.

Singapore context: The use of English language is not prevalent amongst Chinese tourists in general and they may struggle to appreciate Singapore's attractions and tourism programmes if these are not done in Chinese. Hence, there is an increasing familiarity with Chinese language, norms and culture in tourism and hospitality workers. The use of MasterCard and Visa based credit cards as payment are not common for Chinese tourists. Hence the need to support them by providing payment modes they are familiar with. In addition, there are integrated reward systems and streamlining of the visa entry process which offers incentives and makes it easier for Chinese tourists to visit.

Cambodia context: Tourist arrivals from China have increased Chinese investment. However, majority of new jobs are going to staff that the Chinese bring to Cambodia. Consequently, with 40%, Cambodia's revenue leakage is one of the highest in Asia (World Bank Group 2017: 52). Chinese investment in Cambodia's real estate market is almost exclusively aimed at the Cambodian upper class, as well as Chinese tourists and businessmen. Despite the economic potential of hotels, casinos and increased tourism numbers, tourism development is benefitting a small group of Cambodia's rich elite (East Asia Forum 2018). Again, local people are excluded from the benefits of an increase in Chinese tourist arrival.

Malaysia context: Malaysia mainly caters to Chinese tourists from the aspects of language, food, and payment method, which is adopted by other destinations as well (Hussin 2018; NST 2019; The Edge Markets 2019b). However, there are many exotic stories related to China due to historic connections between the two countries. Malaysia uses these stories to close the psychological distance with Chinese tourists. Languages, food, and payment methods are basic needs of Chinese tourists (including other international tourists), which could make a trip to a foreign country easier for Chinese tourists. With regard of telling exotic stories related to China, Malaysia portrays itself as a China-friendly country to maintain trade relations with China and draw investments from China. Meanwhile, the strategy closes Chinese tourists' psychological distance with Malaysia.

Table B6: How various businesses cater to the needs of Chinese tourists and evaluate their successes and failures.

Tasmania	NSW	QLD	VIC	Western Australia
• Mandarin speaking park rangers. • More seats provided by airlines. • Restaurants offer Chinese menus. • Using Chinese-recognised icon for road safety campaign.	• Destination NSW has developed resources to assist the tourism industry and related businesses to cater for Chinese visitor needs. • Destination NSW has a strategy document (*China tourism strategy 2012–20*) to coordinate efforts across key stakeholders. • Growing use of technology and Chinese app-based payment systems and services.	• Provide information and training resources to tour operators. • Remove language and cultural barriers. • Adapt product to meet Chinese tourists' needs. • Introduce Chinese payment platforms. • Develop mini program on WeChat. • Install Australia's first Ctrip concept store in GC. • Address 'ripping off' incidents.	• Improvement and enhancement of Chinese visitor satisfaction. • Immerse Chinese tourist into food production and appreciation. • Increased ability to access services and move around Melbourne.	• Same time zone as China • Developing a Chinese holiday planner in Mandarin. • Developing day tours around Perth delivered by a professional Chinese-speaking guide. • Developing a travel planning smartphone app in Mandarin.

Tasmania context: These strategies are meant to make the Tasmanian experience more seamless to Chinese visitors. They alleviate their anxieties and tap into their pre-existing image of the state. Mandarin speaking park rangers are deployed during the busy summer period at the top three national parks for Chinese visitors and many restaurants are offering Chinese language signage and menus (Howarth and McIntyre 2017; Killick and Richards 2019). Bobbie the Bear, familiar and popular with Chinese tourists, has been enlisted for the latest road safety campaign (Han 2018b). In general, there is a need for infrastructure to be improved in many areas, roads, rubbish, footpaths, and toilets as they affect visitors and residents alike.

New South Wales context: NSW, and especially Sydney, are increasingly drawing on technology to cater for Chinese visitors, which is important as the market is one of the most technologically literate and dependant. Chinese tourists are able to use UnionPay, China's largest payment network, with Sydney Taxis and the development of a 'Sydney City Card' app promotes tourism and retail destinations to Chinese tourists and provides reviews and highlights promotions using geolocations technology (Bajkowski 2019; Industry NSW 2013). In 2019, at the Sydney Fish Market, Nicholas Seafood launched a new AliPay payment platform which translates menus allowing purchases to be made without communicating in English (Koehan 2019).

Queensland context: QLD aims to 'Be China Ready' by providing resources that cover service standards, Chinese culture, visitor expectations, and to promote a safe and welcoming destination image; to address the safety concerns and unfamiliarity associated with visiting regional areas (Passmore 2019; Weber 2019). To provide a sense of familiarity to Chinese visitor's strategies such as providing guidelines in English and simplified Chinese, use of Chinese booking sites and payment platforms have been suggested/implemented. To make travelling within QLD more convenient 'The City Experience Mini Program' allows for bookings, payments, and interactive travel guides of tourist spots (Pierce 2019a). There have been efforts to address rogue businesses following reports of Chinese tourists being 'ripped off', however it remains a problem.

Victoria context: The Great Ocean Road region has long held events and implemented Chinese tourist satisfaction strategies, including Chinese signage and traffic signs in Chinese. Crown Casino has continued to make efforts to train and develop Chinese speaking staff. Rayners Orchard in the Yarra Valley promoted Lunar New Year fruit and vegetable pick, adding to the aims of increasing Chinese tourist's food production and appreciation in Victoria. Addressing Chinese tourist's convenience and satisfaction, the City of Melbourne launched the 'Melbourne City Card' that allows for goods and services to be paid with AliPay.

Western Australia context: China is seen as an important market by the state government which is reflected in their commitment to strengthen awareness of WA as a must-see holiday destination (WA Government 2019). Both industry and government have taken steps to see the Chinese market grow. Tourism WA has acknowledged the importance of the growing Chinese market in WA as China is the state's biggest international visitor market in terms of spending. In 2018, Tourism WA was allocated and additional $1 million by the WA government to advance the Chinese market.

Table B7: How sentiments towards Chinese tourists are managed (or not managed) in different destinations.

Singapore	Cambodia	Malaysia
• Explicit strategies are not apparent. • Possible excessive reporting of the visiting and spend of Chinese tourists. • Subtle hints of alignment in reports. • Possibly playing down tensions between locals and Chinese tourists.	• The Cambodian government issues regulations that benefit Chinese nationals (over Cambodians) and thereby fuels economic competition (business opportunities, jobs, housing, landownership). • Fails to enforce measures to reduce the impact of casino tourism. • Tells journalists to report only positive stuff relating to Chinese tourism.	• Malaysia tourism authority works with its Chinese counterparts to provide necessary information to Chinese tourists and locals for better mutual understanding. • It seems Malaysia is not ready to touch its own ethnical issues.

Singapore context: There is very little reporting on social behaviours both positive and negative in the Singapore media. Much was focused on economic contributions. This could be a part of the management of sentiments towards Chinese tourists - by silencing social observations and articulating economic benefits of having them. The economic benefits of the Chinese tourists could be deemed to be paramount in an uncertain economic climate. As the largest source market equipped with high rate of growth in numbers and untapped potential in second and third tiered cities, the Singapore media might have played a role in structuring positive popular imagination.

Cambodia context: Chinese tourism is said to generate new jobs and income for the national economy. However, these benefits do not trickle down to the poor Cambodians who bear the brunt of the negative impacts, in particular: an increase in land disputes; unaffordability of housing; and increased competition as Chinese nationals also establish informal businesses (PPP 2018h; 2018j). In addition, the government fails to effectively control misconduct and abuse by Chinese nationals and turn a blind eye to soaring crime related to Chinese-led casino tourism.

Malaysia context: There are two sources of negative sentiments towards Chinese tourists in Malaysia. One is from preserved 'uncivilised' behaviours of Chinese tourists, largely from cultural misunderstandings (Malikhao 2017). Another, from Malaysia's own domestic ethnical tension (Harris and Han 2019). China is the third largest source market for Malaysia's inbound tourism, and Malaysia aims to have more Chinese tourists. To achieve the target, negative sentiment towards Chinese tourists must be controlled at a manageable level. However, local Chinese have been portrayed as a threat to the Malay hegemony, thus Malaysia is reluctant to solve the issue of institutionalized discrimination against local Chinese.

Table B8: How sentiments towards Chinese tourists are managed (or not managed) in different destinations.

Tasmania	NSW	QLD	VIC	Western Australia
• There is no apparent proactive strategy. • Both positive and negative stories are found in the media.	• No specific strategies to address negative sentiments toward Chinese visitors/tourists. • Chinese tourists are framed mostly positively in the media. • Some suggestion that Chinese travellers do not spend much money. • Some negative sentiment toward high-end gaming visitation, which could spread to other segments. • Instances of tricks by travel agents and selling of stolen credit card details.	• Attract Chinese FITs over group tours. • Reject certain controversial development projects by Chinese developers. • Little actions taken to manage negative sentiments towards Chinese international students.	• Victoria aims to enhance Chinese tourists' satisfaction. • Little evidence of queries into public sentiments.	• No clear strategy.

Tasmania context: Protests and resistance is part of the democratic system in Australia. Despite many negative stories expressed in the media and some dissatisfied residents, Tasmania is open for business with the Chinese. Positive stories have also been reported but sentiments towards China, Chinese businesses, and Chinese tourists are not properly managed. Regardless, Chinese investments are still welcomed and approved, and Chinese visitors served.

New South Wales context: Destination NSW actively encourages cultural awareness, including an acknowledgement of the need to improve knowledge of the Chinese market in regional NSW. Chinese tourists are generally framed positively, owing to the focus on the economic benefits of visitation. Despite this, there has been mentioning's of 'zero dollar' tourists from China, although reports show that the total visitor expenditure is of high economic value (Taylor 2018). These sentiments sit in contrast to a growing negative sentiment towards China in general, including Chinese business, investment, influence, and the Chinese government broadly. High-end gaming visitors have received some negative coverage in relation to the proposal of building a new luxury hotel in Sydney for Chinese visitors (Gorey and Cummins 2019). The negative feeling towards Chinese property investment in Sydney risks developing negative sentiments in other segments pertaining to Chinese visitation. Instances of deception in relation to Chinese tourists risk a reluctance to deal with the Chinese visitation market and creating a reputation of Chinese tour operators and travel agents as being disingenuous.

Queensland context: Sentiments towards Chinese tourists varies across different stakeholder groups. Large groups tend to have a negative reputation, as such FITs are favoured. QLD aims to address the negative reputation associated with large Chinese tour groups and to attract market segments with higher yield. Negative media coverage of questionable business practices and resident sentiments in QLD may have indirect effects on tourism but this is yet to be fully explored and understood (Vogler, McKay, and Marszalek 2019). Alongside ongoing political tensions between Australia and China in recent years, Chinese tourists have been met with confusion, scepticism, and even racism (Xu 2019). Chinese students have received negative sentiments in QLD, and little actions have been observed from the QLD government and tourism industry to directly respond to or manage this.

Victoria context: City of Melbourne has developed a multipronged approach that seeks to enhance Chinese tourists experience and safety using cross platform promotions and information provisions. As the Australia-China bilateral relationship has waned, there has inevitably been a ripple effect on attitudes towards Chinese tourists. There is little evidence to suggest that the Victorian tourism industry were undertaking queries into public sentiments towards Chinese tourists in the state.

Western Australia context: There is no hard evidence that would suggest whether sentiments towards Chinese tourists are being managed. The general message from individual tourism operators is that there might be too much hype and focus on the Chinese tourism market overall, instead tourism operators should be focusing on other international markets (Mann 2019). Sentiments about Chinese tourists might be indirectly influenced by politics and trade relationships. It is suggested that WA is more exposed than most other states because of our reliance on China for iron ore exports.

Table B9: How different states and countries have successfully leveraged Chinese tourists' experiences and perceptions in their international business/relations strategies.

Singapore	Cambodia	Malaysia
• Local food products launched in Changi Airport enable manufacturers to use tourists as a test bed for bringing local products to stores overseas. • Use of Chinese payment technologies also played a role in revitalising older districts such as Chinatown in Singapore. • Pairing of companies e.g., Singapore Airlines and Alibaba – Cloud, Fliggy etc. • Marketing Singapore with STB and EDB working together.	• Chinese language skills among Cambodians to be enhanced. • The quality of training and education in the tourism and hospitality sector to be enhanced. • The quality of human resources in the hospitality sector to be enhanced. • Security and law enforcement in tourism destination areas enhanced.	• Tourism enhances the positive image of Malaysia. • Many Chinese tourists become loyal supporters and promote Malaysian products, such as durian, which become a symbol of Malaysia. • Stories of ethnic coexistence attract Chinese investors. • Tourism improves Malaysia's education image and attracts more Chinese students.

Singapore context: Singapore uses strategies that allows the connections between tourism and retail development to cater to both tourists and locals. Singapore is successful in tapping onto Chinese tourists to sample products which Singapore wishes to launch in China. Being culturally more familiar (Asian with an ethnic Chinese majority), Singapore appears to feel more at ease with attracting and hosting Chinese tourists. Thus, much of the rhetoric and efforts appear to focus on business related aspects of the encounter.

Cambodia context: Cambodia has established the China Ready Center (CRC) to enhance experiences and perceptions of roughly 3 million Chinese tourists per year by 2020 (China.org.cn 2016; Khmer Times 2016). The Cambodian government pushes the establishment of tourism institutes and universities to provide relevant skills in compliance with ASEAN standards, to train Chinese speaking staff in the tourism industry and more Chinese speaking tour guides (PPP 2019g). To further boost the tourism sector, the Prime Minister requested China's cooperation on human resource development by collaborating with the Royal Academy of Cambodia and a number of relevant ministries. All in all, tourism is used to leverage Cambodia's higher education and vocational training sector. In addition, the prime minister has requested and been granted China's assistance in improving the security in Cambodia's tourism destination areas.

Malaysia context: Malaysia uses tourism to portray itself as a China-friendly, harmonious, and progressive country for attracting Chinese tourists, investors, and students. China is the most important trading partner and one of the most important investors for Malaysia. On the other hand, Malaysia is strategically located at the centre of SEA. China needs Malaysia's support on its BRI, so China is willing to invest in Malaysia as long as Malaysia welcomes Chinese investment. Those Chinese tourists who are satisfied with their travel experience in Malaysia become supporters and promoters of some Malaysian products, such as durian, and bridge connections between the two countries (SCMP 2019).

Table B10: How different states and countries have successfully leveraged Chinese tourists' experiences and perceptions in their international business/relations strategies.

Tasmania	NSW	QLD	VIC	Western Australia
• Most Chinese have not heard of Tasmania. • Tasmania promotes its clean air and water, and nature. These tie closely to the quality produce from here. • Daigou are carrying Tasmanian products. • It is unclear if the "Tasmanian" brand matters more than the "Australian" brand	• Tourist experiences do not appear to be being used in any systematic way to promote business and international relations. • Tourism holds the potential to support the NSW government's engagement strategies. • There is a risk to foster trade and investment if visitation experiences are negative. • China's trade and investment ambitions in NSW are also fostered through facilitating Chinese visitation.	• Regional development. • International investments. • Opportunity for retailers. • Increased freight capacity for export.	• Linking tourism to education, investment, and wider economic development. • 10-year target strategy developed. • INVEST VICTORIA has offices in China.	• No clear strategy. • Online tools developed for businesses to attract Chinese tourists. • Tourism WA Partnership with AirAsia and Singapore Airlines Group.

Tasmania context: The brand 'Tasmanian' is intended to tell the story of the people and how they make things work for themselves. It focuses on the view of Tasmania as natural beauty with clean air, pristine environment, and quality agricultural produce. Whether consumers know that the products are Tasmanian of just Australian is unclear. Tourism is seen as one of many industries in Tasmania. They are promoted together during trade missions, but these industries stay siloed. The parallel *Daigou* export system has emerged, and the good name of Tasmania is spread through word-of-mouth. However, Tasmania as a tourist destination remain relatively unknown to potential Chinese visitors to Australia.

New South Wales context: While it is difficult to determine how tourism is currently leveraged to assist with international business relations and strategies, there are many ways tourism can contribute towards NSW's investment and trade ambitions. This includes building relationships, developing cross-cultural understandings, building trust and knowledge of investment opportunities, and showcasing agricultural, food and beverage products (Industry NSW 2013). Chinese visitation into Sydney not only facilitates tourism, but education, trade, investment opportunities, and contributes to the luxury tourism sector.

Queensland context: Queensland is well known for its nature-based experiences and tourism plays an important role in regional development in the state. Chinese tourism has good potential for regional areas through drive tourism, especially among the Chinese student market. QLD has leveraged on Chinese tourism to attract international investments and to create business opportunities. For instance, Chinese investments help revive tourism infrastructure and facilities, and the Gold Coast leverages in Chinese Business travellers to showcase the destination's tourism assets and leisure opportunities (Potts 2019; Robinson 2018). A 2004 study identified shopping experiences on the Gold Coast as a main area for improvement to attract Chinese tourists (Li and Carr 2004). The redevelopment of Pacific Fair is an outcome to address the issue. Increases to air routes also provides export opportunities for local food producers to the Chinese market and increased interconnectivity.

Victoria context: Chinese tourism is interlinked with international education, investment, and wider economic development. Victoria aims to build trade relationships and overcome outer state competitors. Victoria developed its China strategy comprising of four ambitious 10-year targets from 2016 to 2026, across trade, investment, visitors, and students. *Invest Victoria*, the state government's key agency for international investment, maintains offices in Shanghai, Beijing, Nanjing, Chengdu, and Hong Kong.

Western Australia context: WA promotes its unpolluted environment, unique flora and fauna, and the natural beautify of the coast and inland regions (Xie et al. 2018). WA also promotes its wine and food as a luxury product. Tourism WA developed a range of online tools for WA businesses to help make the most of online marketing opportunities and attract more Chinese tourists. Additionally, in 2019 they announced they would enter a partnership with AirAsia and Singapore Airlines Group to arrange joint marketing campaigns promoting Western Australia's tourism highlights (Paddenburg 2019).

Table B11: How tourism is used by various states and countries in their charm offensive strategies.

Singapore	Cambodia	Malaysia
• Emphasis on regional cooperation between ASEAN countries in building the region as an attractive destination to markets such as China. • Singaporean singers expanding into Chinese market and acting as tourism ambassadors.	• The recent surge in Chinese tourist arrivals is a consequence of the long-standing and further intensifying entanglement of Cambodia's fate with China. The rhetoric surrounding the "China-Cambodia Cultural and Tourism Year in 2019"and mutual visits of high-ranking government people to attend events that mark such campaigns exert 'soft power' to mollify the harsher reality of the underlying political economy.	• Malaysia-China cultural tourism year is supported by both governments, which affirms bilateral ties. • Tourism is used to assure Chinese citizens that Malaysia is a China-friendly, peaceful, and progressive country. • Tourism is used to promote people-to-people connections.

Singapore context: China's influence is acknowledged by Singapore and Singapore is keen to work with China to further Singapore's role in outbound Chinese tourism. However, Singapore does this in subtle ways, stressing to do this jointly with other ASEAN partners. Singapore is aware of its geopolitical situation (ethnic Chinese majority island state in a Malay majority region) and is wary of standing out in its charm offensive. However, it is keenly aware of the economic benefits its cultural closeness may.

Cambodia context: Chinese tourists are not just visitors for the purpose of leisure and recreation. Chinese tourism is closely intertwined with an exploration of business and investment opportunities. Chinese tourists turn into business owners and investors, acquiring (disputed) land, purchasing real estate, and sometimes engage in informal or even illegal activities. Enjoying the status of one of China's most favoured nations, Cambodia receives substantial Chinese economic and military aid along with burgeoning investments. As in all other friendships that China pursues across the world, access to cheap labour, markets, and natural resources is paramount. China's participation in Cambodia's garment manufacturing brokers access to markets that ordinarily restrict direct imports from China. In addition, Cambodia's geo-political position secures China's military access to the Gulf of Thailand and the South China Sea.

Malaysia context: Malaysia is medium-sized country, almost impossible to exert it influence on China other than through indirect methods. Meanwhile, China improves its image by more Chinese tourists traveling in Malaysia, and China also needs Malaysia's support for its BRI (The Star 2019). Tourism enhances Malaysia's positive image in China, and it assures to Chinese citizens that Malaysia is a China-friendly, harmonious, and progressive country. With the support of both government, there are more Chinese tourists traveling to Malaysia, and more Malaysians traveling to China as well.

Table B12: How tourism is used by various states and countries in their charm offensive strategies.

Tasmania	NSW	QLD	VIC	Western Australia
• Tourism is represented and promoted with other industries through trade missions. • Promoting an image of bilateral relations. • Tasmania has attracted Chinese investments, but tourism is not part of the charm offensive.	• No reporting on NSW's use of tourism in its 'charm offensive' strategies. • Some mention of Destination NSW soliciting Chinese influencers to promote NSW tourism destinations and experiences. • Visitation experience used to enhance the image of NSW and Sydney.	• Establish a Chinatown on Gold Coast. • Host the Chinese Dream Conference. • Sister City Agreements with Chinese Cities.	• Bilateral relations through sister city relationship with Tianjin. • Victoria has also struck out on its own in China independent of the Australian government - unilaterally signing a memorandum of understanding with China's Belt and Road Initiative."	• No clear strategies. • Attempts to attract Chinese students.

Tasmania context: The visit by President Xi to Tasmania has spurred Chinese visitor numbers and is used to affirm the two country's bilateral relations. While the promotion of the image of the state remains important, that effort is done mainly through trade missions and marketing campaigns. These campaigns are targeted for tourism, for instance, which inevitably enhances perceptions of the state.

New South Wales context: Packaging tourism with other trade products has allowed Sydney and NSW tourism marketing materials to be used to showcase the state during trade missions. NSW's tourism attractions are drawn upon as imagery to help sell NSW trade and industry and provide important venues and experiences to charm dignitaries and business travellers. Utilising famous tourism products and destinations as venues or backdrops enhances the image of NSW and Sydney as a place to conduct business.

Queensland context: The Gold Coast Chinatown is a strategic initiative to portray a positive image to China, to foster international relationships (especially between Australia and China), and to attract investment and tourists. Hosting of the Chinese Dream conference could be regarded as a contentious charm offensive to affirm the bilateral ties between the Gold Coast/QLD and China (Rowan 2019). To boost the Gold Coast's international profile and attract economic, cultural, educational, and professional opportunities QLD has sought to affirm bi-lateral relationships.

Victoria context: Melbourne uses its sister city relationship with Tianjin to leverage support for tourism and wider trade - trade and investment between Melbourne companies and organisations and their counterparts in select regions of China.

Western Australia context: There is no hard evidence to suggest that tourism is being used to affirm ties through a charm offensive. WA attempts to promote itself as a film-friendly destination. In 2019, one of the biggest names in Chinese film and television – Meng Fei – visited WA for location scouting (Ascott and Ison 2019). In November 2019, Perth was reclassified by the Commonwealth as a regional city to attract skilled migrants and international students, although fears that an influx of international students might contribute towards an over-reliance on fee-paying international students at the expense of local students.

Appendix C: Methodology

Methodology

This project used a pragmatist world view that is predicated upon problem-centred, real-world, and practice-oriented issues and outcomes. In other words, the report focused on 'what works' rather than explicitly seeking to establish an absolute and objective standard (Frey 2018). The project engaged a realist comparative analysis around responses to Chinese tourists in five Australian states (Tasmania, New South Wales, Queensland, Victoria, and Western Australia) and three popular Southeast Asian destinations (Cambodia, Malaysia, and Singapore). These locations were identified as case-study destinations in this report. As such, the project utilised a comparative approach to draw out best practice and relevant lessons for Tasmania and partner destinations.

Theoretically, a comparative method usually adopts "control through common features" or "most similar systems" approaches to minimise variables (Pearce 1993: 22). By establishing common bases, the theoretical development is stimulated when differences are located, as empirical fields are specifically bounded by their own institutions, economic, social structure, and culture (Baszanger and Dodier 1997: 16–18). In the context of this project, the research team has listed out a series of common research questions on how destination authorities responded to the increasing number of Chinese tourists in their jurisdictions. The research questions were grouped into two overarching themes: 1) Service and reactions towards Chinese tourists; and 2) Leveraging positive experiences and perceptions. The themes and the corresponding research questions are outlined in Table C1.

Table C1: Research themes and the corresponding questions

Theme 1: Service and reactions towards tourists from China	
1a	How different destinations attract diverse Chinese tourists and what are the main success factors in each destination?
1b	How various businesses cater to the needs of Chinese tourists, and what are their successes and failures?
1c	How sentiments towards Chinese tourists are managed (or not managed) in different destinations?
Theme 2: Leveraging positive experiences and perceptions	
2a	How different states and countries have successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies?
2b	How different states and countries have successfully leveraged Chinese tourist experiences and perceptions in their international business/relations strategies?

To assist with answering the research questions, the research team conducted a qualitative online media content review as well as the analysis of the key official documents following the established process by Simon Fraser University (Roberts 2021). From the methodological point of view, this approach yielded in an in-depth interpretive content analysis (Altheide and Schneider 2013). Media review is an effective method as it captures a picture of patterns that might affect and influence our thinking and perceptions of our day-to-day life (Potter and Riddle 2007).

The research team conduced a broad and a narrower search of terms between 1 January 2017 and 29 November 2019. This timeframe was chosen to ensure the relevance and timeliness of the information. A broad search included the following terms: 'Chinese tourism', 'Chinese tourists'; 'Chinese outbound tourism'. A narrower search included the following groups of terms: 'China' AND 'tourism' AND [case-study location – e.g., 'Hobart' / 'Tasmania']; 'China' AND 'tourist' AND [case-study location – e.g., 'Sydney' / 'New South Wales']. The search was done via the media database Factiva and other sources that were narrowly local but contextually relevant (e.g., theonlinecitizen.com (Singapore) and the GC Bulletin (Gold Coast, Queensland)). Google News has also been used to ensure a better coverage of the terms. A total of 47 key official documents[3] and 343 media publications were compiled (see Table C2 for details). Key official documents and media publications pertaining to the Covid-19 outbreak were not included in the overall analysis and, therefore, they do not feature in the table.

Table C2: Number of sources analysed

	Case-Study Destinations	Number of Media Articles	Number of Key Official Documents
1	Tasmania	32	3
2	New South Wales / Sydney	15	9
3	Queensland / Brisbane	44	15
4	Victoria / Melbourne	54	3
5	Western Australia / Perth	18	10
6	Cambodia	46	3
7	Malaysia	23	2
8	Singapore	111	2

On 29 November 2019, the research team met in-person in Hobart, Tasmania to present and discuss the findings of the research study. Every case-study destination was presented in relation to the five research questions outlined in Table 1. This process ensured the harmonisation of the findings' presentation style and identification of any gaps that might have occurred in the initial document and media search and analysis. The individual researchers then updated the corresponding reports.

Conceptually, this report drew upon several tourism studies concepts, including destination branding, tourist perception, cultural complexity, and authenticity. This allowed evaluation and comparison of lessons between case-study destinations. And finally, this enabled the situation and contextualisation of different actions and strategies across the various destinations, so as to find lessons that are relevant to local circumstances.

[3] Key official documents include government press releases, government websites, government reports and other documents, as well as consultancy reports.

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