CHINA | MARKET PROFILE 2018-19

MARKET OVERVIEW

CHINA LEISURE VISITATION TO WA

- **48,800** leisure visitors to WA
- WA’s **5th largest** international market by leisure visitors
- **$89.8 million** spent by leisure visitors in WA
- Average daily spend: **$137**
- Average length of stay: **14 nights**

CHINA LEISURE VISITATION TO AUSTRALIA

- **1,031,900** leisure visitors to Australia
- Australia’s **largest** international market by leisure visitors

VISITORS AND SPEND IN WA BY PURPOSE

- **Holiday**: 47%
  - Visitors: 18%
  - Spend: 26%
- **Visiting Friends and Relatives**: 14%
- **Business**: 6%
- **Education**: 15%
- **Other**: 6%

SEASONALITY

**SHORT-TERM LEISURE VISITOR ARRIVALS TO WA**

Chinese New Year fell in February in 2019
CHINA MARKET PROFILE 2018-19

TRAVEL PARTY

- Unaccompanied: 45%
- With a partner: 22%
- Group of friends/relatives: 32%
- Other: 1%

LEISURE VISITORS BY AGE

**WA**
- 15-19 years: 2%
- 20-34 years: 37%
- 35-49 years: 30%
- 50-64 years: 24%
- 65+ years: 7%

**Australia**
- 15-19 years: 3%
- 20-34 years: 26%
- 35-49 years: 29%
- 50-64 years: 34%
- 65+ years: 9%

REGIONAL DISPERSAL

- On average over a quarter (28%) of Chinese leisure visitors to WA spend at least one night in Regional WA.
- Australia’s North West: 0%
- Australia’s Coral Coast: 14%
- Australia’s Golden Outback: 6%
- Australia’s South West: 17%

TRAVEL PACKAGES

- 3% of Chinese leisure visitors to WA arrived on a travel package (i.e., paid for their flight to Australia and at least one other component of their trip as one packaged price).

REPEAT VISITORS

- 66% of Chinese leisure visitors to WA are on a return visit to Australia.

OTHER STATES VISITED

- 62% of Chinese leisure visitors to WA only visit WA on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA

- 1-7 Nights: 41%
- 8-14 Nights: 27%
- 15-30 Nights: 11%
- 31+ Nights: 21%

TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA

- Hotel/resort/motel or motor Inn: 50%
- Friends or relatives property: 34%
- Other Private Accommodation: 15%

GROUP TOUR v. FREE INDEPENDENT TRAVELLERS (FIT)

- 99% of Chinese leisure visitors to WA are free independent travelers. Chinese leisure visitors to the rest of Australia are much more likely to be on a group tour and only 69% are free independent travelers.
High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

**DEFINITION OF A HIGH VALUE TRAVELLER**

- **Travel Long Haul**: Considering or intending to visit Australia.
- **Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences**: Represent “high value”: above average trip expenditure, and a higher likelihood to stay longer and disperse further.

**WHAT CHINESE HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY**

- World class nature & wildlife
- World class coastlines, beaches and marine wildlife
- Good food, wine, local cuisine and produce
- A safe and secure destination
- Friendly and open citizens, local hospitality

**HVTs BARRIERS TO VISITING AUSTRALIA**

For Chinese HVTs, the biggest barriers to visiting Australia, are **time, competition and difficulty to plan**. Indeed, in comparison to international markets, Chinese HVTs are **less likely** to say that Australia is too far to travel or too expensive. To combat issues of time, and perceptions that Australia is “too hard to plan” and that it would be “too difficult to fit everything in” on a trip to Australia, Chinese HVTs should be armed with tools such as **example itineraries**, advice on the **best and most efficient ways to travel** from point to point, and guidance on **how to enjoy a diversity of quality experiences** in a short amount of time.

**Top 3 Barriers to visiting Australia**

1. I don’t have enough annual leave
2. Planned a holiday to another destination
3. It is too hard to plan

**HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES**

Based on last out of region holiday
Based on their last holiday, Chinese HVTs tend to **decide on their holiday destination and make their first booking** around 1-2 months before their trip.

**HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING**

**Inspiration**

- Online hotel booking site
- Online flights booking site
- Online travel agent
- Traveller review sites
- Travel/guide books

**Booking**

- Flights: Travel website/app
- Airline (online)
- Airline (offline)
- Activities: Travel website/App
- Operator (online)
- Travel agent (offline)
- Accommodation: Travel website/app
- Accomm. Provider (online)
- Private accomm. Provider

Prepared by the Tourism WA Strategy and Research Team
In research undertaken in 2018, Chinese HVTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that **Perth and Surrounds** is most preferred amongst Chinese HVTs. **Aquatic and coastal experiences** top the list of most appealing, whilst **food and wine** experiences tend to appeal to Chinese HVTs more than to other international HVTs.

### MOST APPEALING EXPERIENCES

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spotting diverse marine wildlife (Esperance)</td>
<td>12%</td>
</tr>
<tr>
<td>Cruising along the untouched coast (Kimberley)</td>
<td>12%</td>
</tr>
<tr>
<td>Lunch by the Swan River or Indian ocean (Perth &amp; Surrounds)</td>
<td>13%</td>
</tr>
<tr>
<td>Relaxing swim at Cable Beach (Broome)</td>
<td>12%</td>
</tr>
<tr>
<td>Admiring the Pink Salt Lakes (Rottnest Island)</td>
<td>12%</td>
</tr>
<tr>
<td>Artisan produce &amp; secluded vineyards (Perth &amp; Surrounds)</td>
<td>12%</td>
</tr>
<tr>
<td>Picnic lunch &amp; spotting kangaroos (Esperance)</td>
<td>12%</td>
</tr>
<tr>
<td>Snorkelling in the reef (Ningaloo Reef)</td>
<td>12%</td>
</tr>
<tr>
<td>Boat ride through horizontal waterfalls (Kimberley)</td>
<td>12%</td>
</tr>
<tr>
<td>Viewing marine wildlife (Rottnest Island)</td>
<td>8%</td>
</tr>
</tbody>
</table>

### MOST APPEALING DESTINATION

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perth</td>
<td>26%</td>
</tr>
<tr>
<td>Rottnest Island</td>
<td>18%</td>
</tr>
<tr>
<td>Margaret River</td>
<td>13%</td>
</tr>
<tr>
<td>Ningaloo Reef</td>
<td>12%</td>
</tr>
<tr>
<td>Broome</td>
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</tr>
</tbody>
</table>

### WHY THESE DESTINATIONS AND EXPERIENCES APPEAL

- **Perth & Surrounds**
  - “Both urban life & the beauty of the natural environment”
  - “A wealth of entertainment, sightseeing, dining, activities and other resources, and the local atmosphere is suitable for holidays”

- **Rottnest Island**
  - “Beautiful environment and many activities”

- **Margaret River**
  - “The original forest experience the original environment”
  - “Taste the wine and enjoy the luxury”

### Notes

*Expenditure excludes pre-paid package spend.

‘Leisure’ comprises both holiday visitors and those visiting friends and relatives (VFR).

### References

1. Tourism Research Australia – International Visitor Survey, YE Jun 19
3. Tourism Australia – Consumer Demand Project 2019 China Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Jun 2017/18/19)
5. BDA – International High Value Travellers - Western Australia State Report, 2019

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