

CHINA | MARKET PROFILE 2018-19

MARKET OVERVIEW

CHINA LEISURE VISITATION TO WA¹

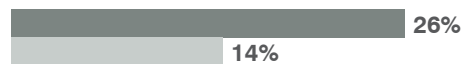
- **48,800** leisure visitors to WA
- WA's **5th largest** international market by leisure visitors
- **\$89.8 million** spent by leisure visitors in WA*
- Average daily spend: **\$137**
- Average length of stay: **14 nights**

VISITORS AND SPEND IN WA BY PURPOSE¹

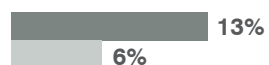
Holiday



Visiting Friends and Relatives



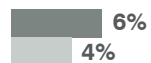
Business



Education



Other



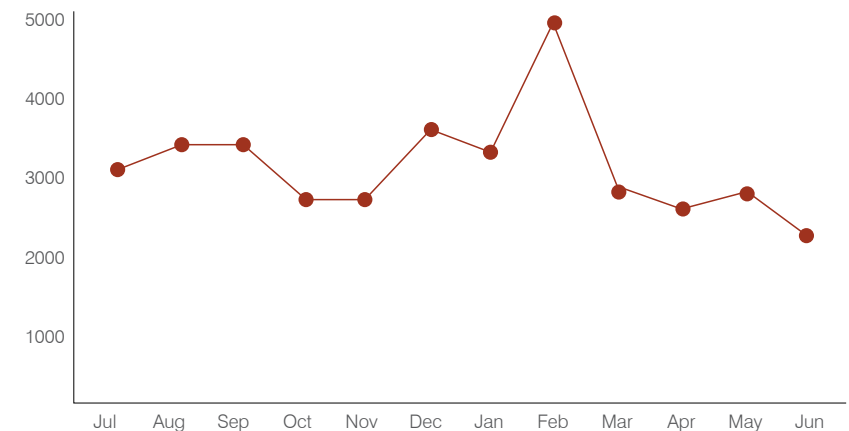
CHINA LEISURE VISITATION TO AUSTRALIA¹

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

SEASONALITY

SHORT-TERM LEISURE VISITOR ARRIVALS TO WA²

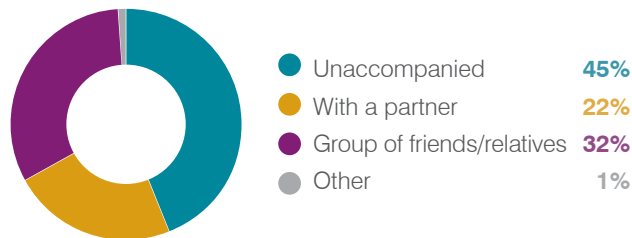
Chinese New Year fell in February in 2019



CHINA | MARKET PROFILE 2018-19

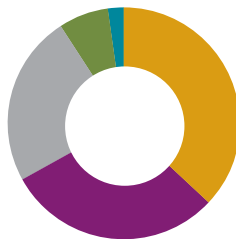
TRIP PROFILE

TRAVEL PARTY⁴



LEISURE VISITORS BY AGE⁴

WA

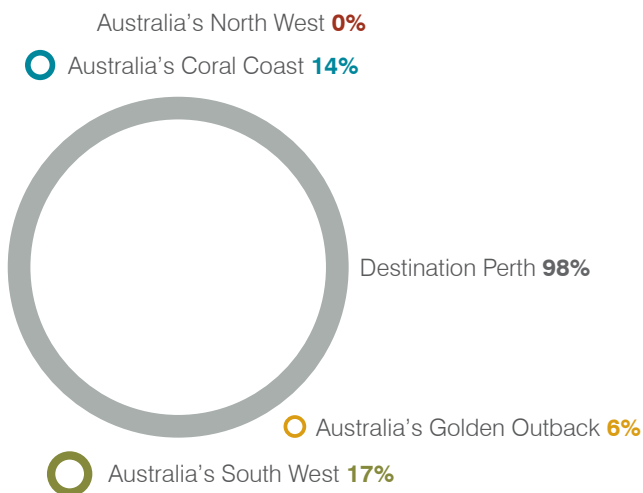


Australia



REGIONAL DISPERSAL⁴

On average **over a quarter (28%)** of Chinese leisure visitors to WA spend **at least one night in Regional WA**.



TRAVEL PACKAGES⁴

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).

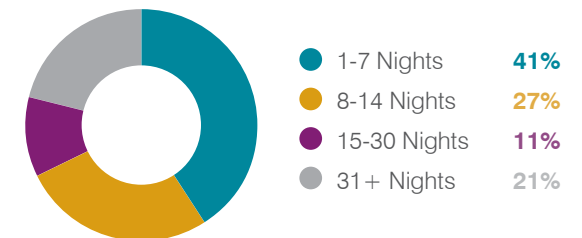
REPEAT VISITORS⁴

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

OTHER STATES VISITED⁴

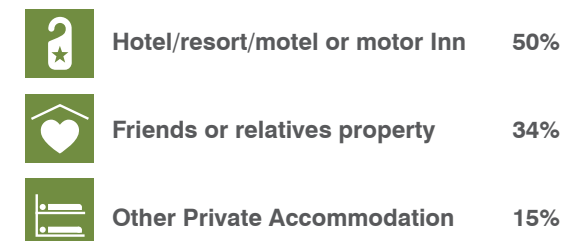
62% of Chinese leisure visitors to WA **only visit WA** on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA⁴



TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA⁴

Proportion staying in this accommodation type (%)



GROUP TOUR v. FREE INDEPENDENT TRAVELLERS (FIT)⁴

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.

CHINA | MARKET PROFILE 2018-19

MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

DEFINITION OF A HIGH VALUE TRAVELLER



Travel Long Haul



Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences



Considering or intending to visit Australia.



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 GENERALLY³



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 AUSTRALIA³

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



I don't have enough annual leave



Planned a holiday to another destination



It is too hard to plan

HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES⁵

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 & BOOKING³

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

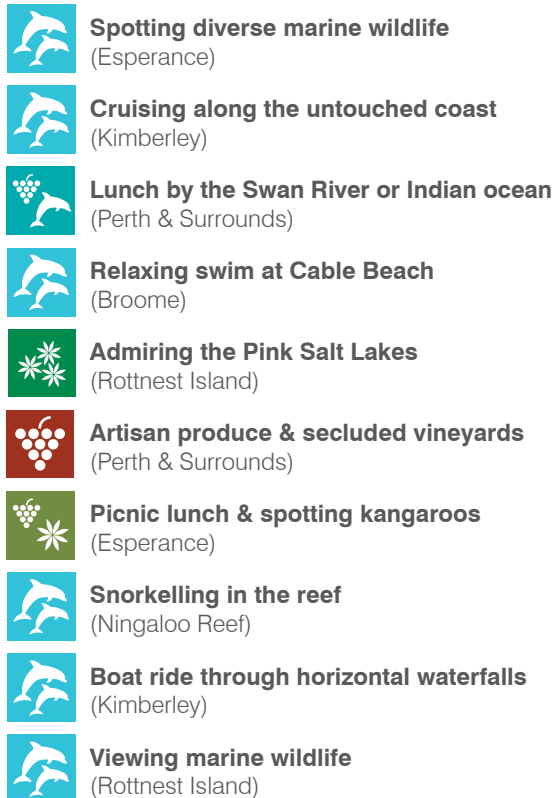
CHINA | MARKET PROFILE 2018-19

APPEALING WA DESTINATIONS AND EXPERIENCES

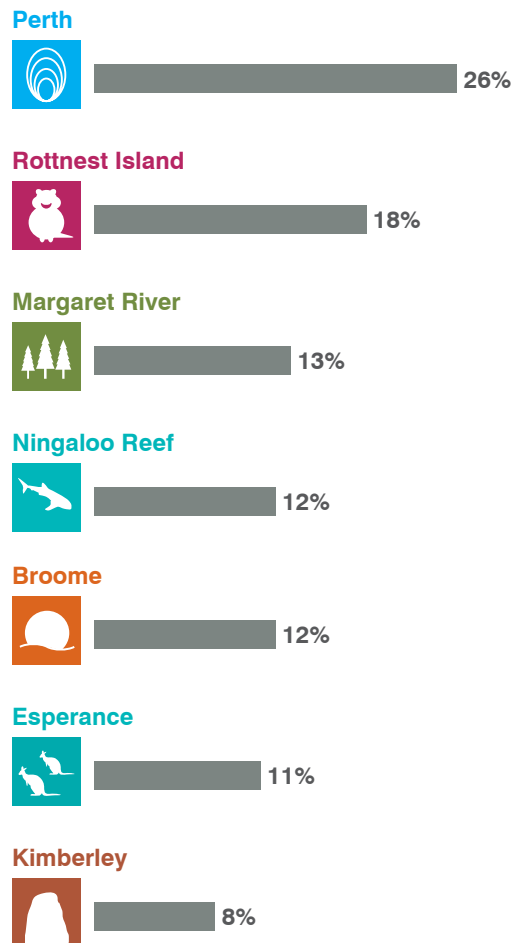
In research undertaken in 2018, **Chinese HVTs** were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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 EXPERIENCES⁵



MOST APPEALING DESTINATION⁵



WHY THESE DESTINATIONS AND EXPERIENCES APPEAL⁵

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
2. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), 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

Published by Tourism WA, 2020
For more information,
please contact:
research@westernaustralia.com