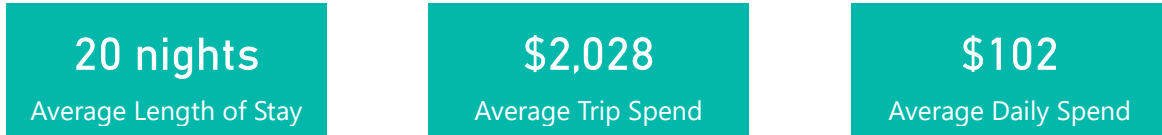


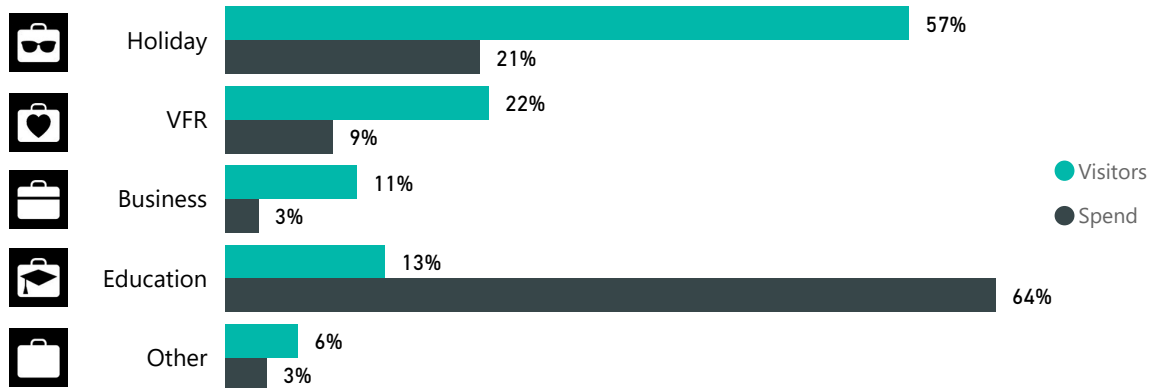
CHINA | MARKET PROFILE 2022

MARKET OVERVIEW

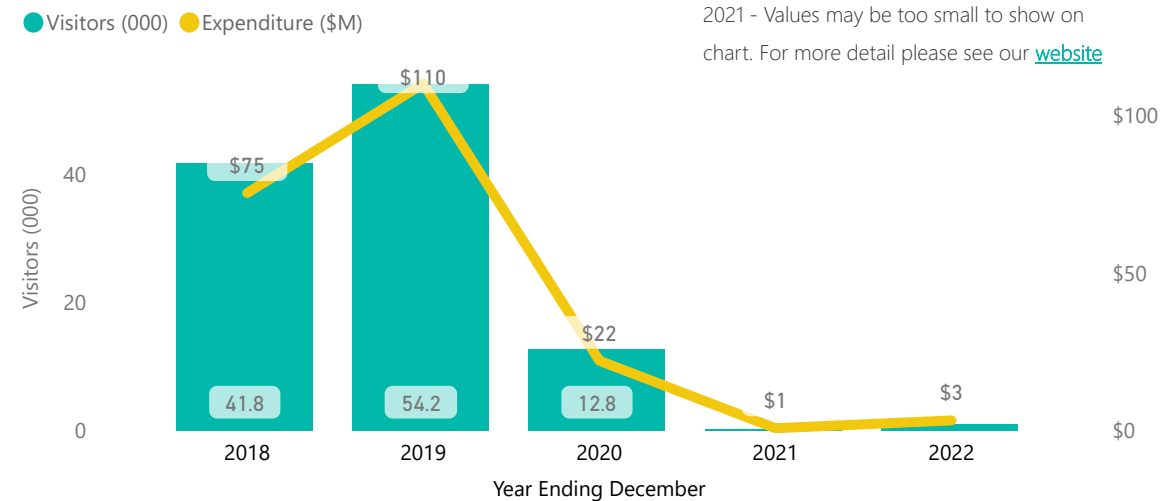
Leisure Visitation to WA¹



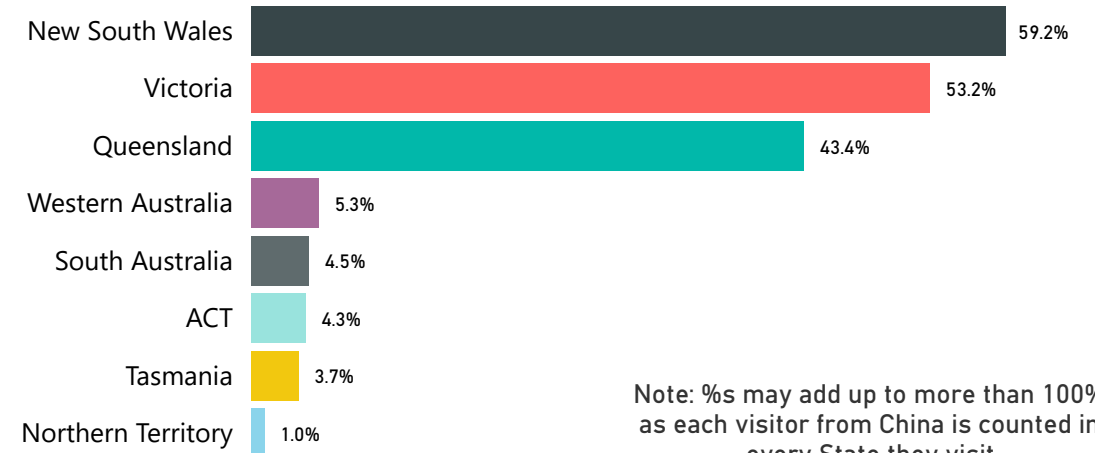
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

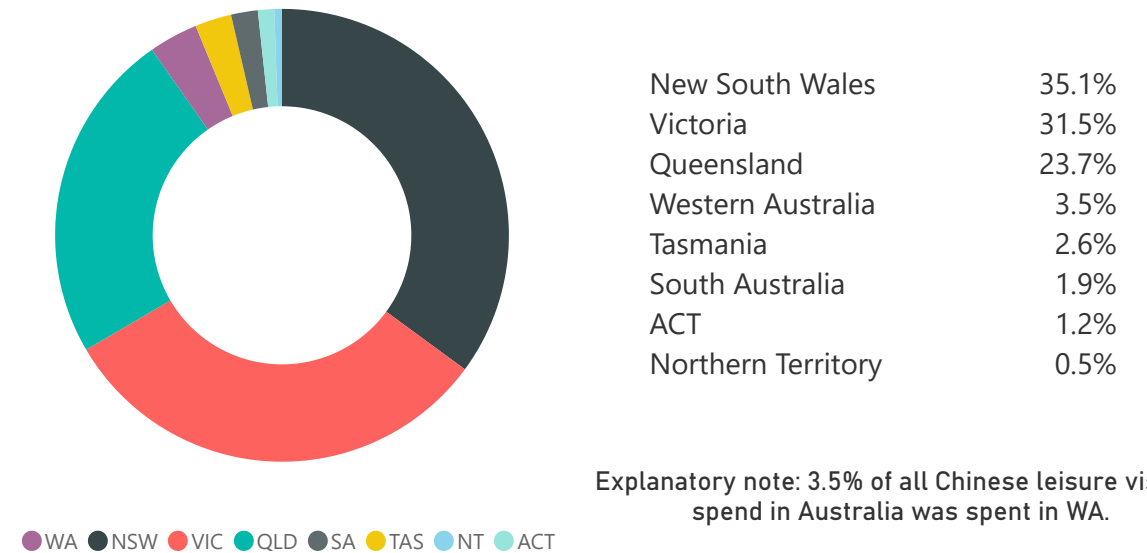


Market Share of International Leisure Visitors to Australia¹



Note: %s may add up to more than 100% as each visitor from China is counted in every State they visit.

Market Share of International Leisure Visitor Spend in Australia¹

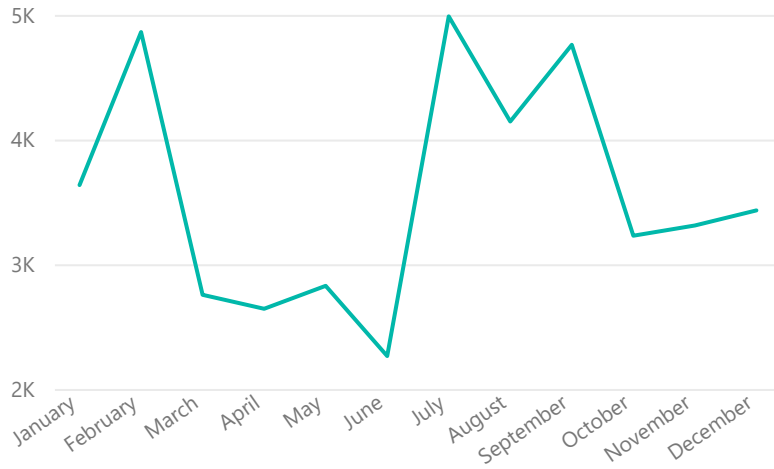


Explanatory note: 3.5% of all Chinese leisure visitor spend in Australia was spent in WA.

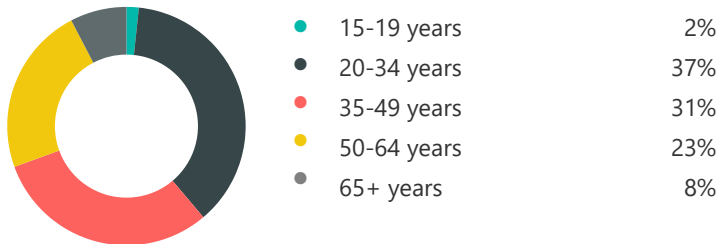
CHINA | MARKET PROFILE

TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

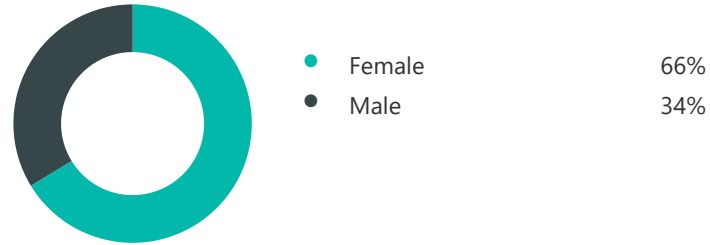
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



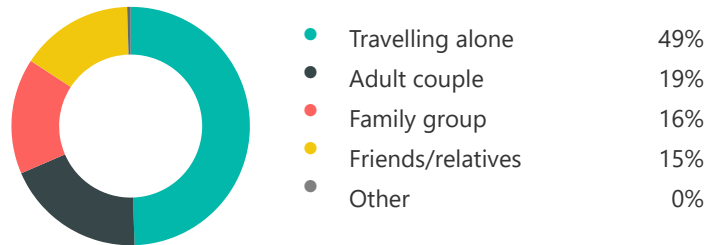
Age³



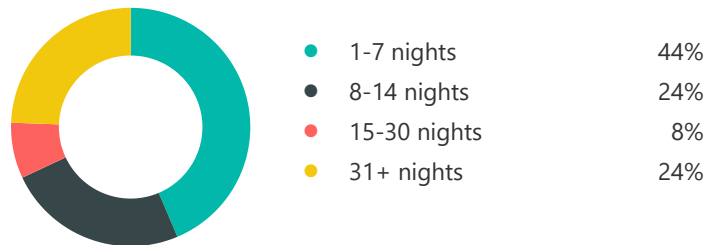
Gender³



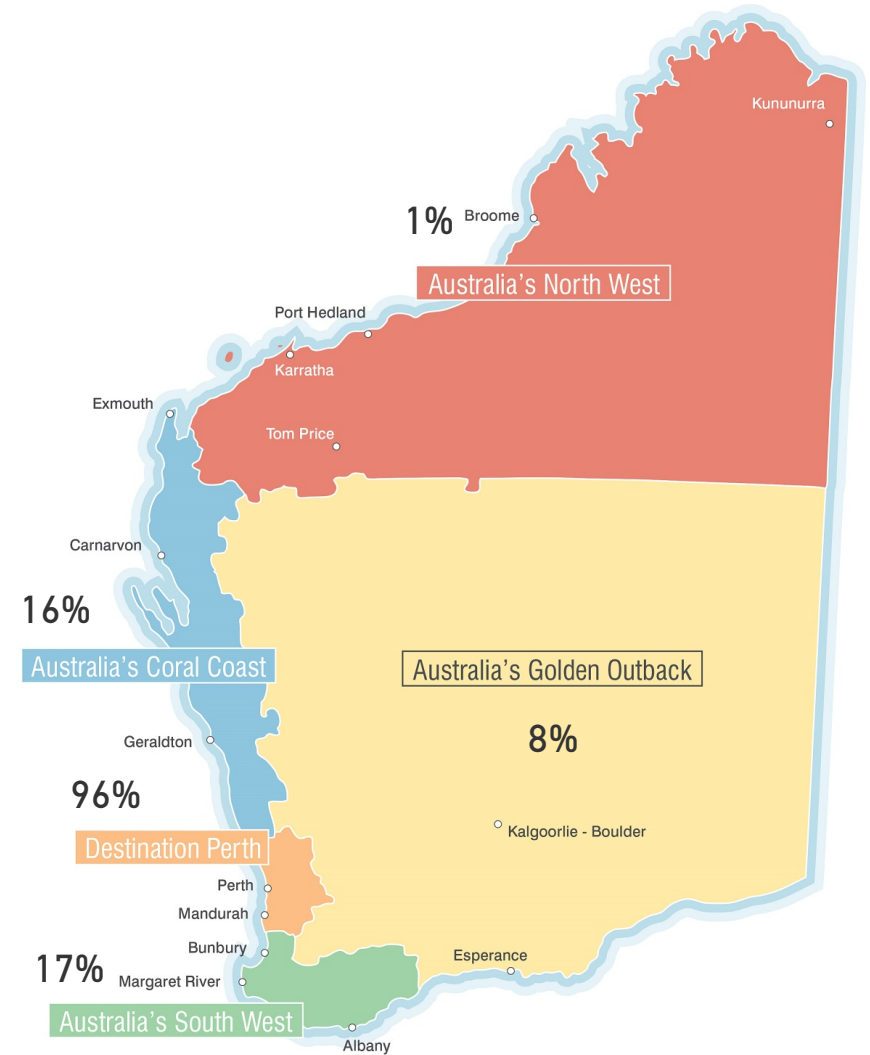
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

CHINA | MARKET PROFILE

TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

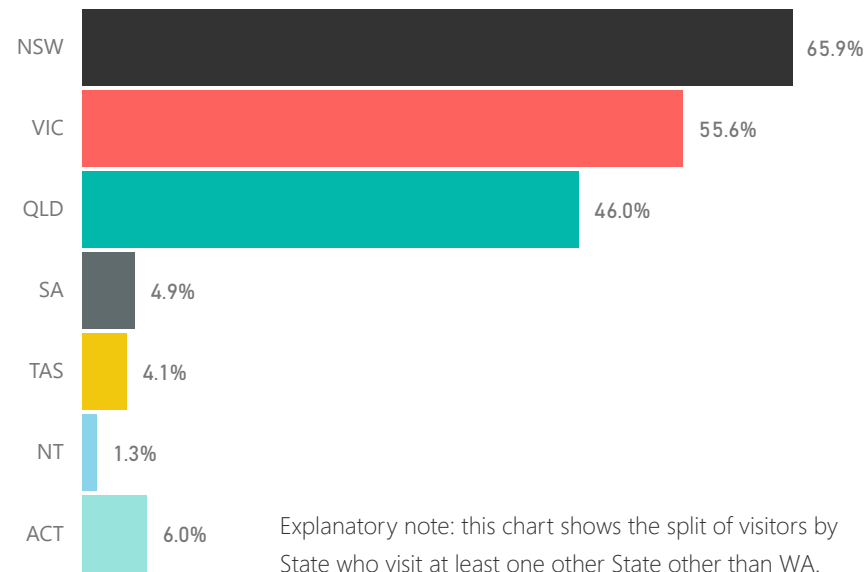
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 91% |
| ② | Go shopping for pleasure | 89% |
| ③ | Go to the beach | 78% |
| ④ | Sightseeing/looking around | 77% |
| ⑤ | Visit national parks / state parks | 70% |

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

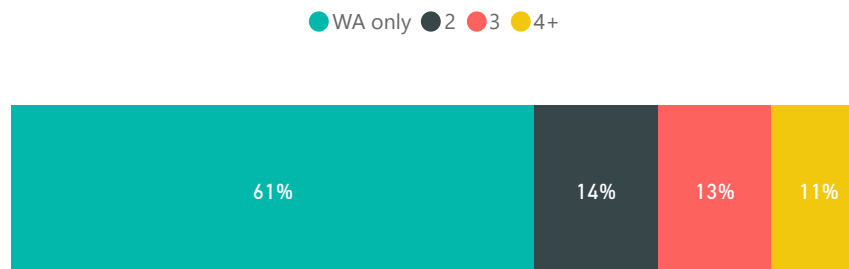
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Hotel/resort/motel or motor Inn | 49% |
| ② | Other Private Accommodation | 48% |
| ③ | Friends or relatives property | 33% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

97% of Chinese leisure visitors to WA are free independent travellers. Chinese leisure visitors to the rest of Australia are much more likely to be on a group tour and only 69% are free independent travellers.

Repeat Visitors³

65% of Chinese leisure visitors to WA are on a return visit to Australia

Travel Packages³

6% of Chinese leisure visitors to WA arrived on a travel package

CHINA | MARKET PROFILE

MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 World class natural beauty
- 2 Safety & security
- 3 Good food & wine
- 4 World class aquatic & coastal
- 5 Clean cities

The top 3 factors are world class beauty and nature, safety and good food & wine. Aquatic & coastal experiences and romantic destinations are more important to China than other markets whilst safety is less important. Sustainability is also above average for this market, while value for money is far less important.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Online hotel booking site
- 2 Online flights booking site
- 3 Online Travel agent
- 4 Traveller review sites
- 5 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

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 I am not sure I would be permitted to enter Australia due to Covid-19
- 2 I am concerned about the dangers of Covid-19
- 3 Political relations between Australia and my country are not favourable
- 4 I am concerned about restrictions and protocols in Australia related to Covid 19
- 5 I am concerned locals will not be very welcoming/friendly

When this research was conducted in December 2022, the main barriers for travellers from China intending to visit Australia were COVID-19 related, much higher than for other markets. Promote the natural beauty, food & wine and aquatic experiences which WA has to offer to encourage Chinese travellers to the State as these barriers ease.

CHINA | MARKET PROFILE

APPEALING WA DESTINATIONS AND EXPERIENCES

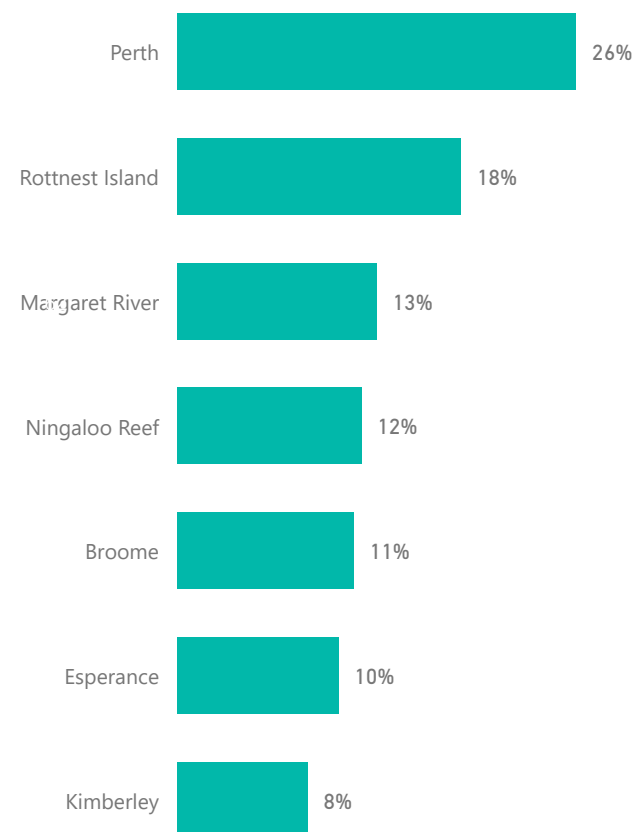
In research undertaken in 2018, Chinese HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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

Most Appealing Experiences⁷

- 1 Spotting diverse marine wildlife**
(Esperance)
- 2 Cruising along the untouched coast**
(Kimberley)
- 3 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 4 Relaxing swim at Cable Beach**
(Broome)
- 5 Admiring the Pink Salt Lakes**
(Rottnest Island)
- 6 Artisan produce & secluded vineyards**
(Perth & Surrounds)
- 7 Picnic lunch & spotting kangaroos**
(Esperance)
- 8 Snorkelling in the reef**
(Ningaloo Reef)
- 9 Boat ride through horizontal waterfalls**
(Kimberley)
- 10 Viewing marine wildlife**
(Rottnest Island)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Margaret River

"Taste the wine and enjoy the luxury"

"the original forest experience the original environment"

Perth & Surrounds

"A wealth of entertainment, sightseeing, dining, activities and other resources, and the local atmosphere is suitable for holidays"

"Both urban life & the beauty of the natural environment"

Rottnest Island

"Beautiful environment and many activities"

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
4. 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 Dec 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

For more information, please contact: research@westernaustralia.com