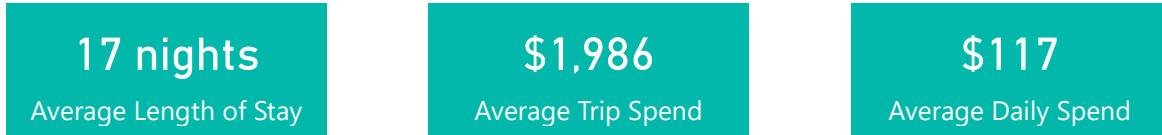


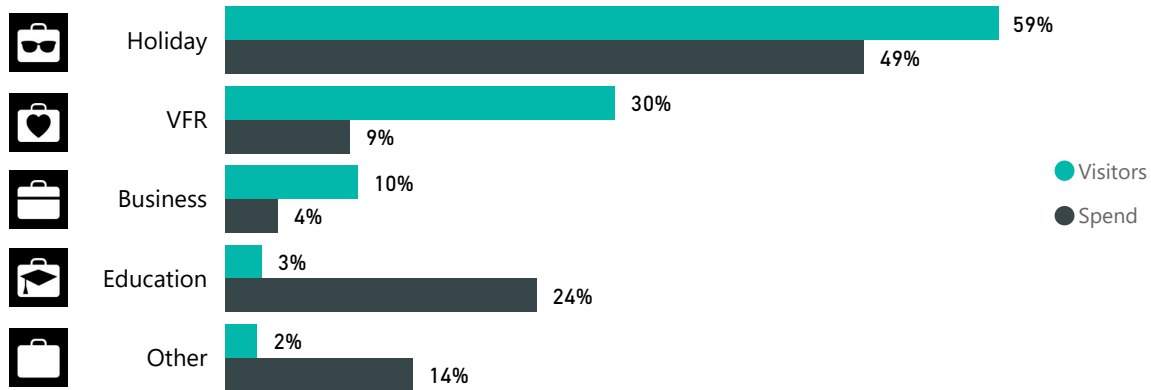
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MARKET OVERVIEW

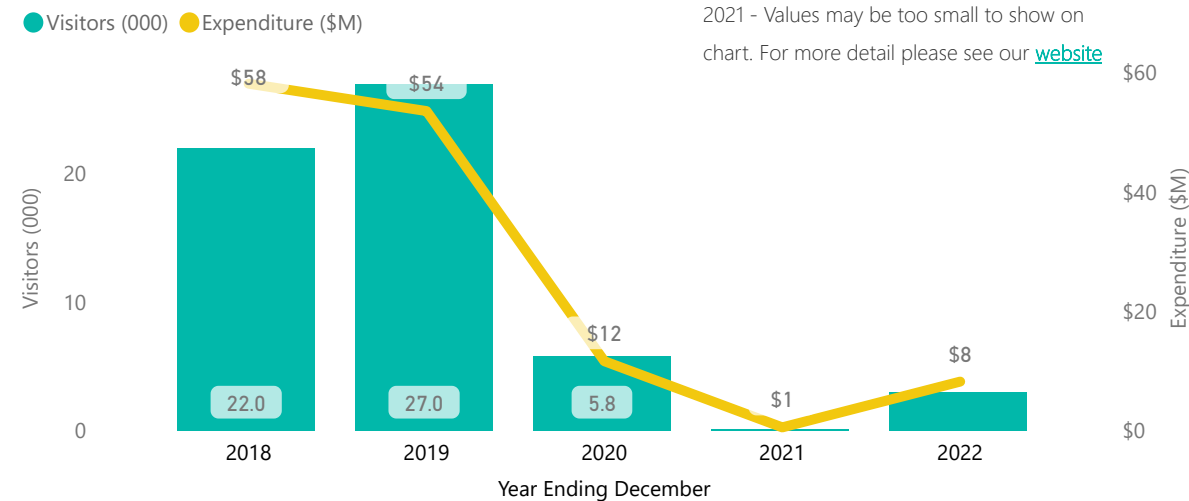
Leisure Visitation to WA¹



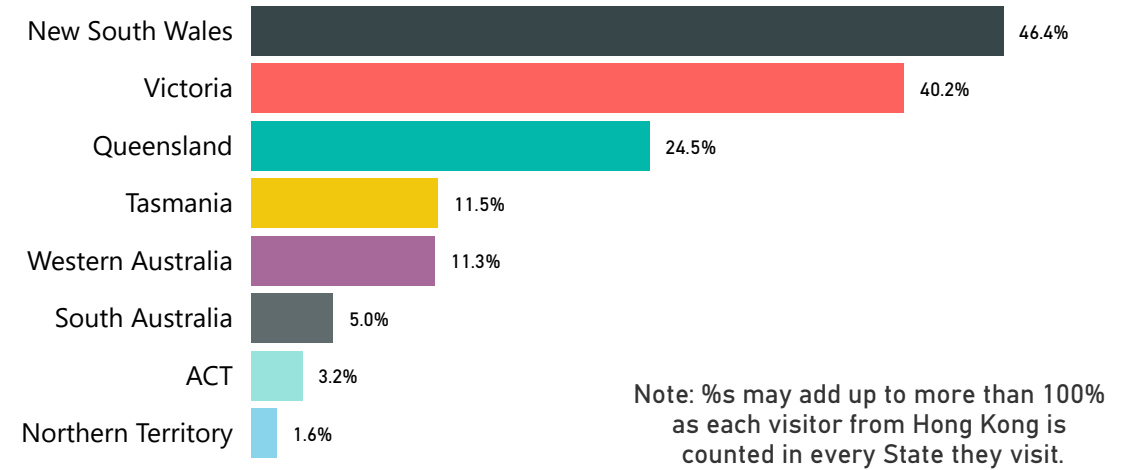
International Visitors and Spend by Purpose (WA)¹



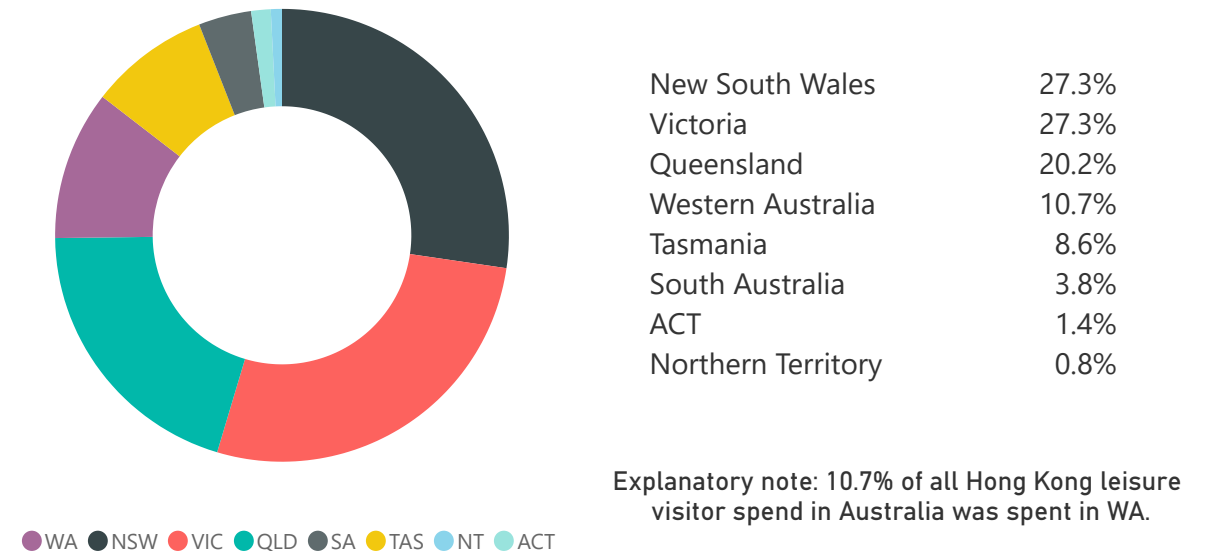
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



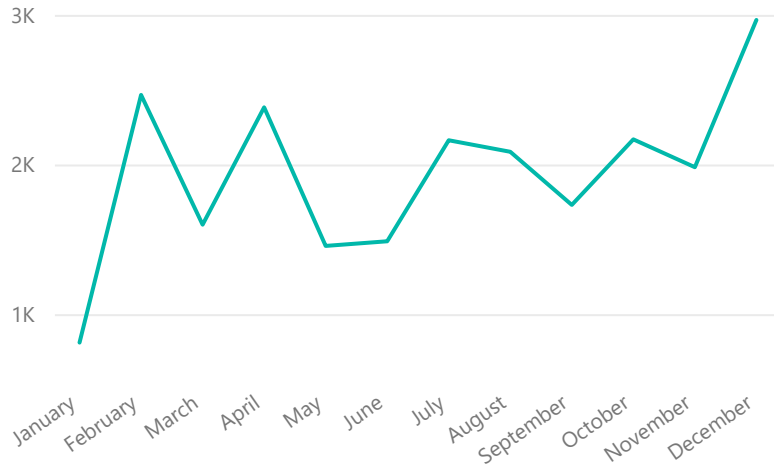
Market Share of International Leisure Visitor Spend in Australia¹



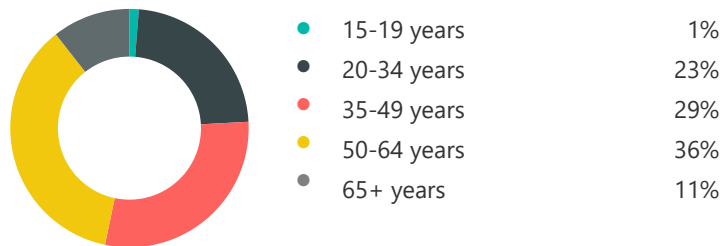
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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

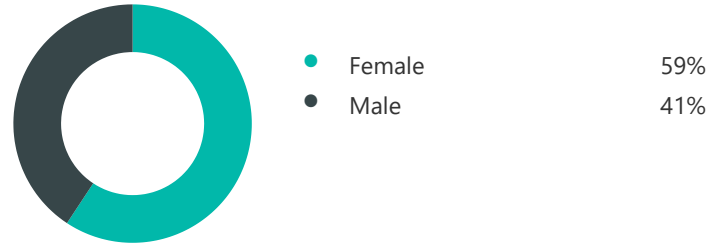
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



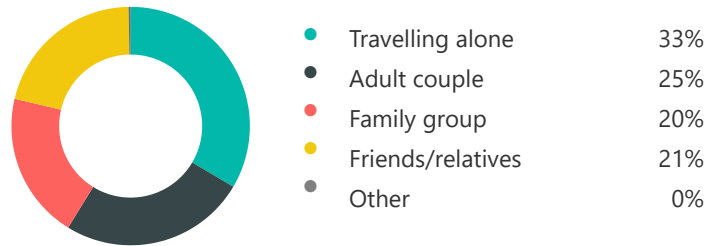
Age³



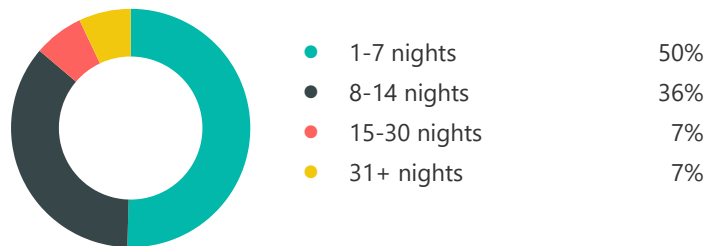
Gender³



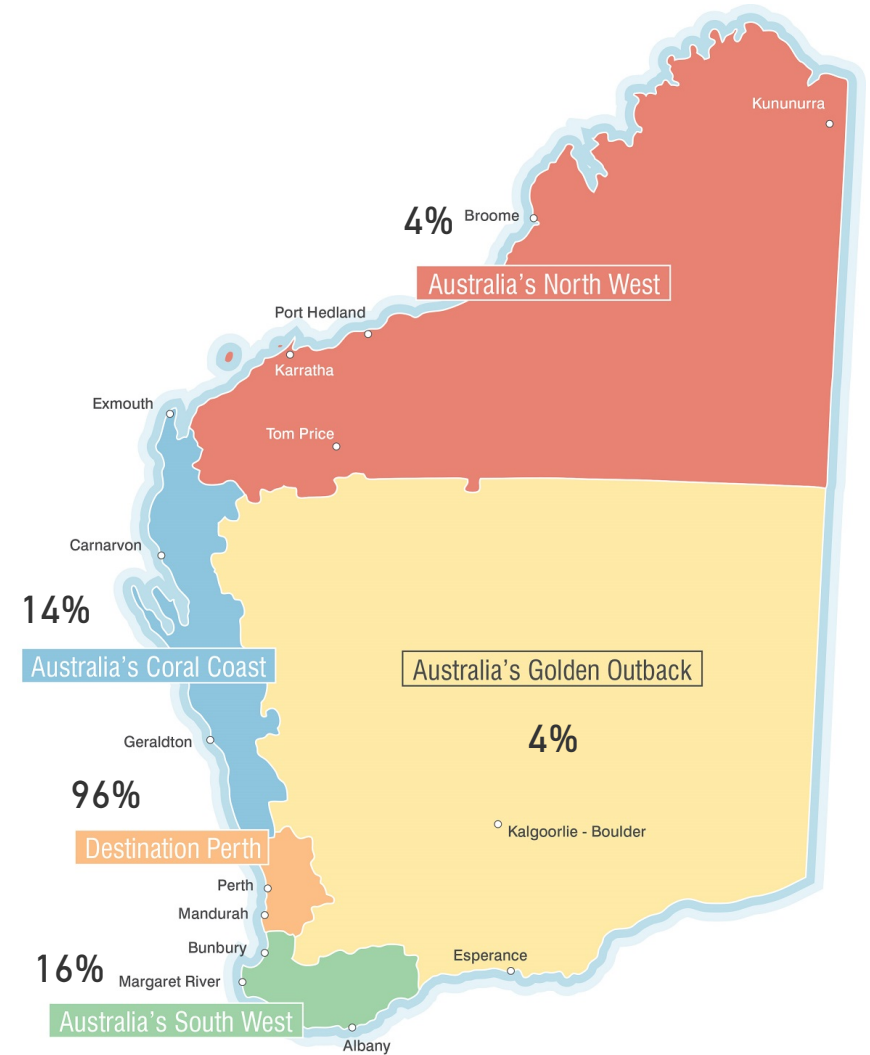
Travel Party³



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.

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

Top 5 Activities for Leisure Visitors to WA³

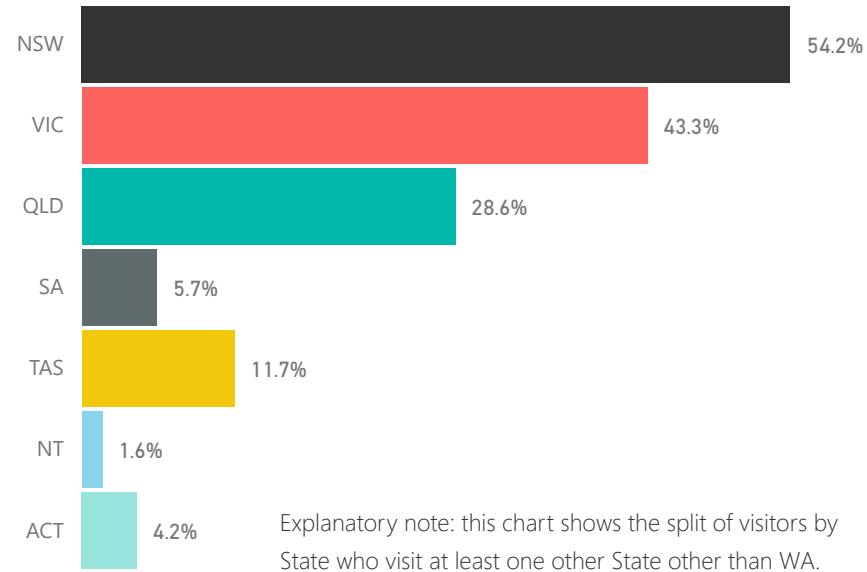
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 93% |
| ② | Go shopping for pleasure | 86% |
| ③ | Go to the beach | 70% |
| ④ | Sightseeing/looking around | 77% |
| ⑤ | Visit national parks / state parks | 66% |

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

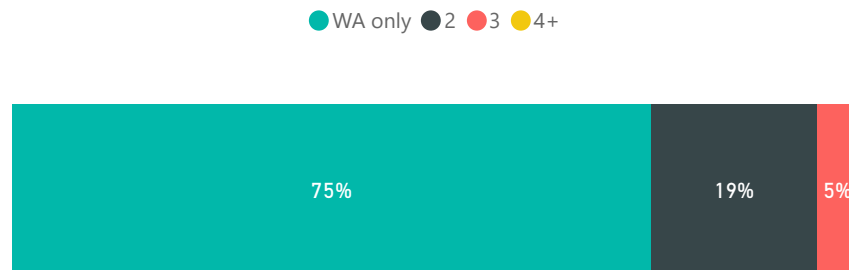
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Hotel/resort/motel or motor Inn | 50% |
| ② | Other Private Accommodation | 46% |
| ③ | Friends or relatives property | 37% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

92% of Hong Kong leisure visitors to WA are free independent travellers. Equally, 91% of Hong Kong leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

Repeat Visitors³

72% of Hong Kong leisure visitors to WA are on a return visit to Australia

Travel Packages³

9% of Hong Kong leisure visitors to WA arrived on a travel package

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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 Safety & security
- 2 World class natural beauty
- 3 Friendly citizens
- 4 Value for money
- 5 Good food & wine

Safety and nature remain the two most important factors. Friendly citizens, value for money and good food & wine follow, all growing in importance.

HYTs Destination Choice and First Booking Timeframes ⁵

Based on last out of region holiday

Based on their last holiday, Hong Kong HVTs tend to decide on their holiday destination between 1 and 6 months before their trip. Hong Kong HVTs are more inclined to make their first booking later, 1 or 2 months out from their trip.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Online hotel booking site
- 2 Online flights booking site
- 3 Travel/guide books
- 4 General internet searching
- 5 Traveller review sites

Booking



Flights

Travel website/app

Airline (online)

Travel agent (offline)



Activities

Travel website/app

Operator (online)

Travel agent (offline)



Accommodation

Travel website/app

Accomm. Provider (online)

Travel agent (offline)

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 Expensive airfares
- 2 There are other places I would prefer to travel to/ have planned to travel to
- 3 It is easy to put off for another time
- 4 High cost of travelling around
- 5 I don't have enough annual leave

Cost of airfares and travelling around are primary barriers as well as preference for other destinations and lack of urgency. To overcome perceived cost barriers, it will be important to promote quality food and wine and nature-based experiences to this market that are affordable, accessible and unique.

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APPEALING WA DESTINATIONS AND EXPERIENCES

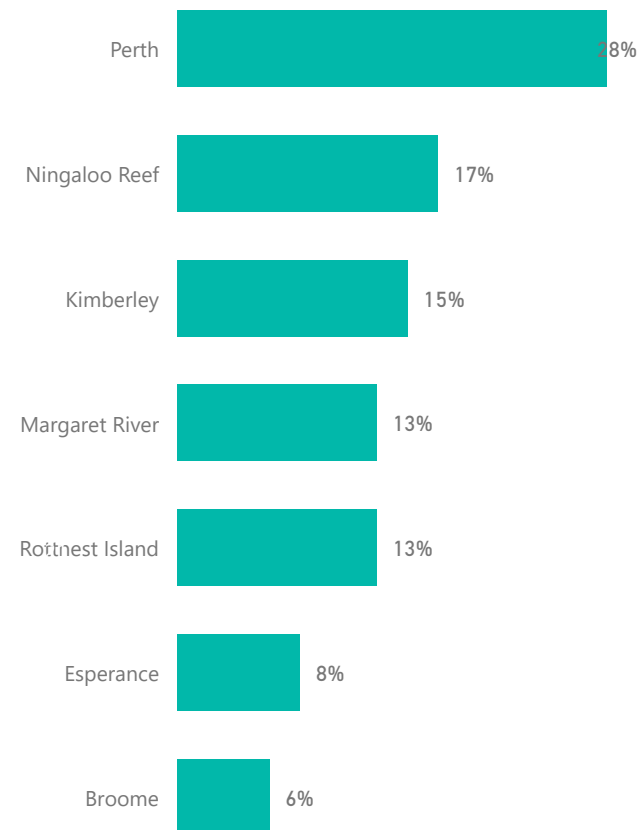
In research undertaken in 2018, Hong Kong HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that Perth and Surrounds is most preferred. Aquatic and natural experiences dominate the most appealing experiences whilst wildlife is also a common theme.

Most Appealing Experiences⁷

- 1 **Spotting diverse marine wildlife**
(Esperance)
- 2 **Discovering untouched islands & beaches by boat**
(Esperance)
- 3 **Sunset camel ride along the beach**
(Broome)
- 4 **Picnic lunch & spotting kangaroos**
(Esperance)
- 5 **Viewing marine wildlife**
(Rottnest Island)
- 6 **Cruising along the untouched coast**
(Kimberley)
- 7 **Admiring the Pink Salt Lakes**
(Rottnest Island)
- 8 **Boat ride through horizontal waterfalls**
(Kimberley)
- 9 **Witness breeding humpback whales**
(Kimberley)
- 10 **Snorkelling in the reef**
(Ningaloo Reef)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Kimberley

"Enjoy the extraordinary scenery"

Ningaloo Reef

"A place of combined natural scenery, wildlife and water"

Perth & Surrounds

"Because it seems you are able to fully enjoy both cutting-edge culture and nature"

"Good food, spectacular night life, glamorous hotel and good wine"

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