

# Consumer Demand Project 2019 China Market Fact Sheet



## Current Chinese Visitation and Expenditure in Australia<sup>1</sup>

Chinese visitation grew by 1.2 per cent to 1.3m in the year ending September 2019, while Chinese visitor spend in Australia increased by 9.4 per cent to \$10.2b during the same period. These visitors spent 58.4m nights in Australia, up 1.7 per cent year-on-year.



**\$10.2b** spend  
+9.4% year-on-year



**1.3m** visitors  
+1.2% year-on-year



**58.4m** nights  
+1.7% year-on-year

## Factors of importance when choosing holiday destination

Like many other markets, natural beauty and safety and security are important to Chinese travellers. They are more likely to look for a romantic destination and destinations with world-class coastlines and beaches.

### Top five importance factors

% ranking each factor in their top five most important



**World-class natural beauty and wildlife** **54%**  
(49%)



**A safe and secure destination** **45%**  
(54%)



**Good food, wine, local cuisine and produce** **37%**  
(35%)



**World-class coastlines, beaches and marine wildlife** **34%**  
(26%)



**A romantic destination** **29%**  
(16%)

% Chinese travellers (%) 11 Market total<sup>2</sup>

## Barriers to visiting Australia

Chinese travellers are more likely than other markets to cite insufficient annual leave as a barrier to visiting Australia.

### Top five barriers to visiting Australia

% of those not intending to visit Australia



■ Chinese travellers ■ 11 Market total<sup>2</sup>

## Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

# Consumer Demand Project 2019

## China Market Fact Sheet



### Current Chinese Visitation and Expenditure in Queensland<sup>1</sup>

Chinese visitors to Queensland in the year ending September 2019 decreased by 1.5 per cent to 496,000. These visitors stayed 9.4m nights, up 7.0 per cent. Overnight Visitor Expenditure (OVE) increased by 8.3 per cent to \$1.6b in the same period.



**\$1.6b** spend  
+8.3% year-on-year



**496,000** visitors  
-1.5% year-on-year



**9.4m** nights  
+7.0% year-on-year

### Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked highest amongst Chinese travellers for consideration and intention, and second for experience awareness. It was the third most visited state.

#### Queensland's competitive rankings<sup>3</sup>

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) <sup>4</sup>	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

**How to read this:**  
Chinese travellers rank Queensland 1<sup>st</sup> out of Australian states and territories for consideration

#### Australia's competitive rankings - Chinese market

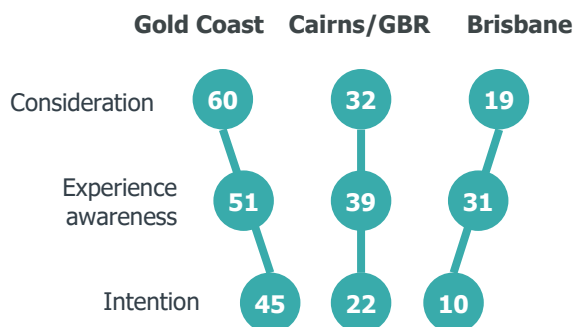
ranking against other international destinations



**How to read this:** Australia comes 1<sup>st</sup> in the list of destinations Chinese travellers intend to visit, but ranks 10<sup>th</sup> in terms of actual visitation

#### Queensland destinations - Chinese market

% of travellers considering Australia



**How to read this:** 60% of Chinese travellers considering visiting Australia have considered visiting the Gold Coast, but only 45% intend to actually visit

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>3</sup> INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
<sup>4</sup> Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

# Consumer Demand Project 2019 China Market Fact Sheet



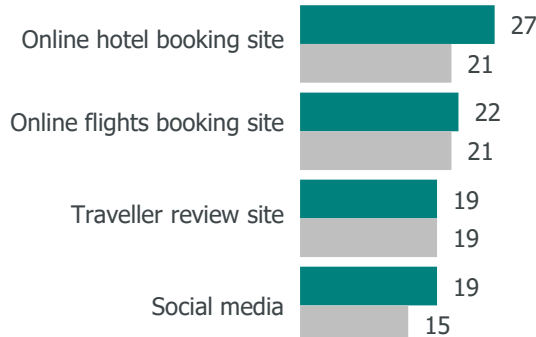
## Sources for travel planning

Compared to other markets, Chinese travellers are more likely to use travel websites and apps during the travel booking cycle. They are also more likely to source inspiration from online booking sites.

Use of offline booking sources is less common for Chinese travellers.

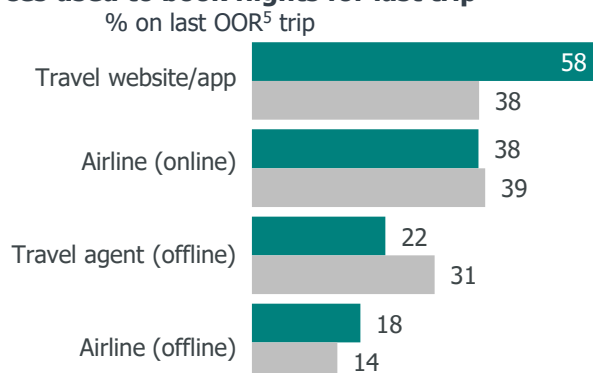
## Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



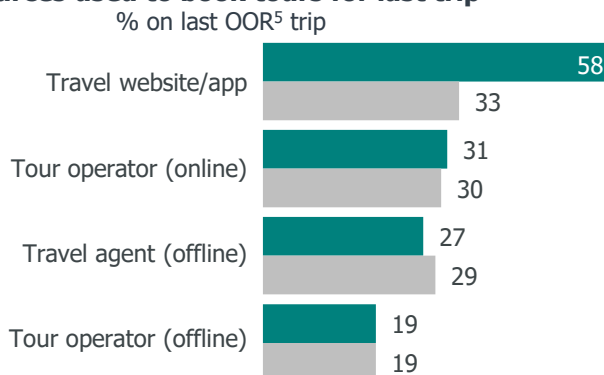
## Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



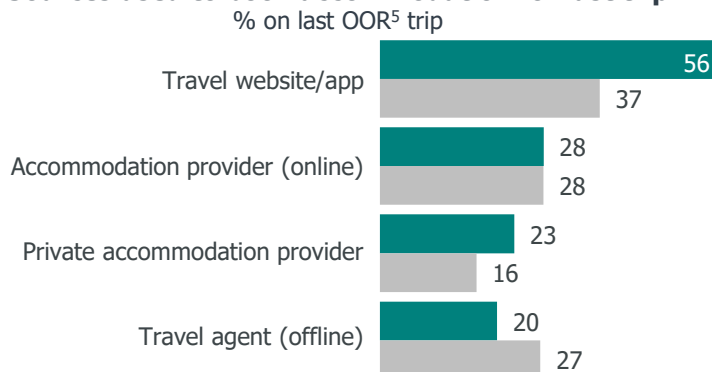
## Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip



## Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ Chinese Travellers    ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (Chinese traveller travelling outside China, Hong Kong, Macau, Japan, Taiwan, South Korea)