

Image: Chinese family on Surfers Paradise Beach, Queensland
Courtesy of Tourism and Events Queensland

CHINESE RESIDENT PERCEPTIONS OF QUEENSLAND

INTRODUCTION

Chinese residents living in Australia are in a great position to spread the word about Queensland's tourism experiences to friends and family, both here and in China.

Tourism Research Australia and Tourism and Events Queensland contracted Colmar Brunton Social Research to conduct a study on how Queensland is perceived as a holiday destination by Chinese residents living in Australia.

Understanding these perceptions will allow Tourism and Events Queensland to develop useful marketing and planning tools for tourism operators in regional areas.

This report summarises the key findings and includes information on:

- Chinese residents living in Australia
- the perfect Queensland holiday
- planning and booking
- communications and imagery
- marketing implications.

METHODOLOGY

The research was conducted over four stages between September 2013 and April 2014:

QUALITATIVE		DESKTOP	QUANTITATIVE ^{2,3}
Nine in-depth interviews with travel agents who interact with Chinese residents living in Australia	Six focus groups with Chinese residents living in Australia ¹	Review of 18 websites, blogs and forums representing the Chinese online community	Online survey of 442 Chinese residents living in Australia ¹
Sep-Oct 2013	Oct 2013	Oct 2013	Feb-Apr 2014

¹ With an Australian visa who have been/intended to be in Australia for more than 12 months.

² The sample consisted of people living in Queensland (24%), New South Wales (42%), Victoria (23%) and other locations (11%).

³ The majority of the sample was in Australia for the purpose of study (56%).

KEY FINDINGS

CHINESE RESIDENTS IN AUSTRALIA

DESTINATION CHOICE

The length of time people have lived in Australia is a key influence on holiday intentions and experiences.

MOTIVATION FOR TRAVEL

A key holiday motivation for Chinese residents living in Australia is to share experiences with family and/or friends from China. The effort they put into entertaining their visitors from China is linked to the strength of the relationship with the visitor.

For visitors they have a closer relationship with, the Chinese person living in Australia will be willing to spend more and would most likely accompany them to most, if not all, attractions.

Similar to most Australian residents, Chinese residents working in Australia are motivated to take short trips to get a break from everyday life, relax and reward themselves.

Destination choice may be a mix of 'best of' and 'depth' type destinations due to their motivation to share experiences with family/friends from China as well as satisfy their desire to see something a bit different.

HOLIDAYING IN AUSTRALIA

The overwhelming majority of Chinese residents (97%) were planning on taking an overnight holiday within Australia in the next two years. Queensland was high on the wish list for residents from all areas of Australia and the top destination of choice for 55% of respondents. The main competing destinations were Victoria (44%) and Tasmania (41%).

Most Chinese residents who had previously visited Queensland had visited the Gold Coast (85%), Brisbane (65%) or Tropical North Queensland (49%).

Visitors from Victoria and Queensland had similar visiting patterns. They were more likely to have visited the Sunshine Coast and the Whitsundays, while the Gold Coast, Brisbane and Tropical North Queensland were more popular for those from New South Wales.

ARRIVAL

Seek Australian destinations and attractions that are well known.

Heavily influenced by the knowledge and perceptions obtained before coming to Australia.

FIRST 2 YEARS

Language is still a barrier.

More likely to join tours in Australia regardless of demographics.

Tours are selected based on the number of attractions they cover.

MORE THAN 2 YEARS

Growing indifference about holidaying at home.

Looking for more experiential and adventurous holidays that are self-directed and provide greater freedom.

The newness of Australia has worn off and some are beginning to seek experiences overseas.

BARRIERS TO TRAVEL

Younger Chinese residents living in Australia were typically studying or working and were therefore constrained by time and budget.

Older Chinese residents living in Australia tended to be working or were retired, and could be restricted by language ability, budget, or wanting to spend time with their children.

PURPOSE IN AUSTRALIA	DEMOGRAPHICS	BARRIERS
Study	Young (18-30)	■ money
		■ time
		■ motivation
		■ competing with China (return to visit parents)
Work	Young (18-34)	■ time
	Older (35-59)	■ competing with China (return to visit parents)
Family (retirees)	Older (60+)	■ language
		■ money (if they are financially dependent on their children)
		■ time with their children

AUSTRALIA'S BEST KNOWN TOURISM LANDMARKS

Chinese residents living in Australia were aware of the 'big three' (literal translation from Chinese) – referred to as the 'big rock', 'big road' and 'big reef' (Uluru, the Great Ocean Road and the Great Barrier Reef). Chinese travellers considered these must see landmarks in Australia, and they also recognised the Great Barrier Reef as world renowned.

Aside from the big three, Chinese residents living in Australia were most interested in holiday destinations that they deemed unique to Australia or remarkably different to China. These included:

- places associated with fresh air (e.g. rainforests)
- uncrowded places
- large scale natural wonders
- landmarks not artificially enhanced by humans (as this is often done in China).



Image courtesy of Darren Jew and Tourism & Events Queensland.

HOLIDAYING IN QUEENSLAND

Queensland was most commonly associated with its main attractions – the Gold Coast (29%) and the Great Barrier Reef (23%). It was also associated with being sunny (26%) and for its beaches (21%). Chinese residents living in Queensland were more likely to mention specific destinations such as Brisbane, the Sunshine Coast and Broadbeach.

Queensland was seen as an attractive holiday destination with half rating it as a must visit destination and 39% describing it as an interesting place to visit.

The Cairns/Great Barrier Reef area and the Gold Coast were the two most dominating landmarks associated with Queensland. These were termed “jing hua” (translation: ‘best of’) destinations. There was limited knowledge of what Queensland offered outside the “jing hua” destinations.

For Chinese residents living in Australia, Queensland is:



SUNSHINE/CLEAR BLUE SKIES



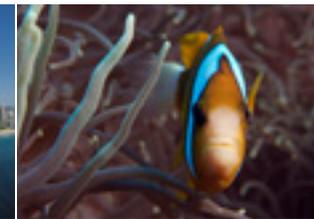
AN OUTDOOR ORIENTED PLACE (SWIMMING, BEACHES)



THEME PARKS



BEAUTIFUL BEACHES



GREAT BARRIER REEF



FRIENDLY AND LAID BACK LOCALS/COUNTRY TOWN ATMOSPHERE



ISLANDS OFF THE COASTLINE



RAINFORESTS



FRESH SEAFOOD

THE PERFECT QUEENSLAND HOLIDAY

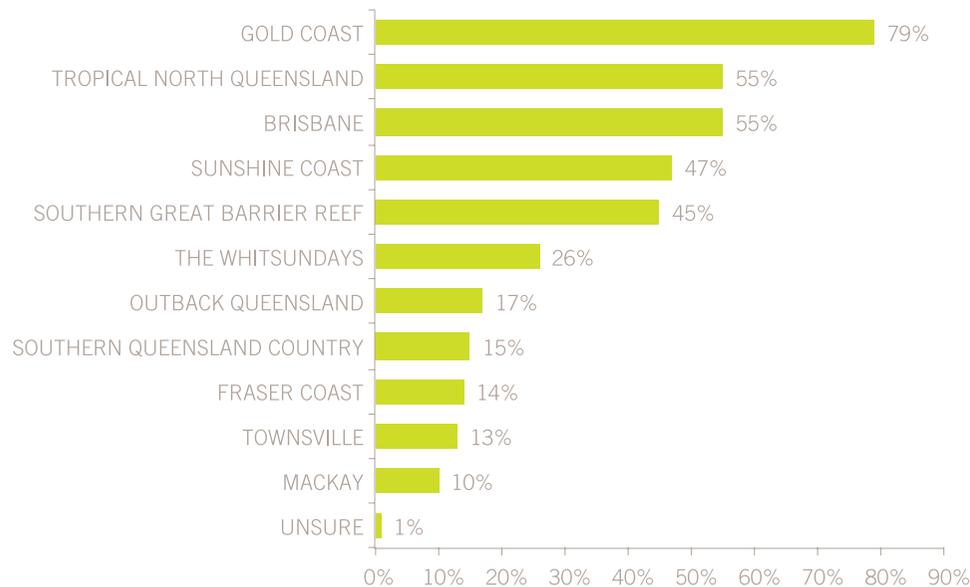
LOCATIONS

As Queensland is associated with sunshine, warm weather, beaches and friendly people, most Chinese residents living in Australia (regardless of age) expected to experience at least one—if not all—of these qualities when holidaying in Queensland.

The Gold Coast (79%) was the top desired location for a Queensland holiday, followed by Brisbane (55%), and Tropical North Queensland (55%).

Those from Victoria and Queensland were more likely to want to visit a wider range of locations than those from elsewhere in Australia. This included having a higher interest in visiting the Whitsundays, Southern Queensland Country, Townsville and Mackay.

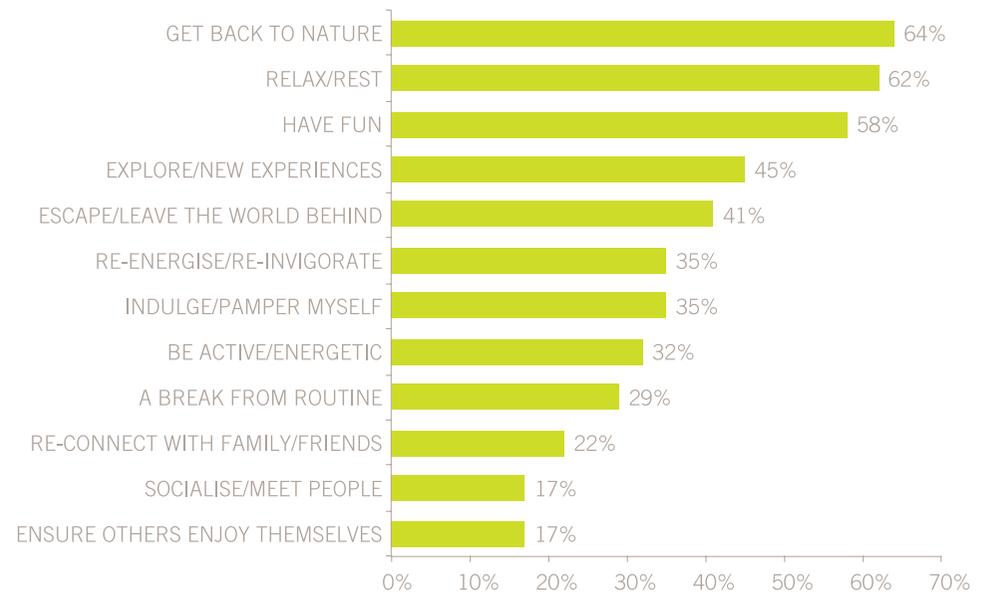
FIGURE 1: PREFERRED QUEENSLAND HOLIDAY LOCATIONS



ACTIVITIES AND EXPERIENCES

Queensland was seen as a good place to go on holiday to get back to nature (64%), relax and rest (62%), and to have fun (58%).

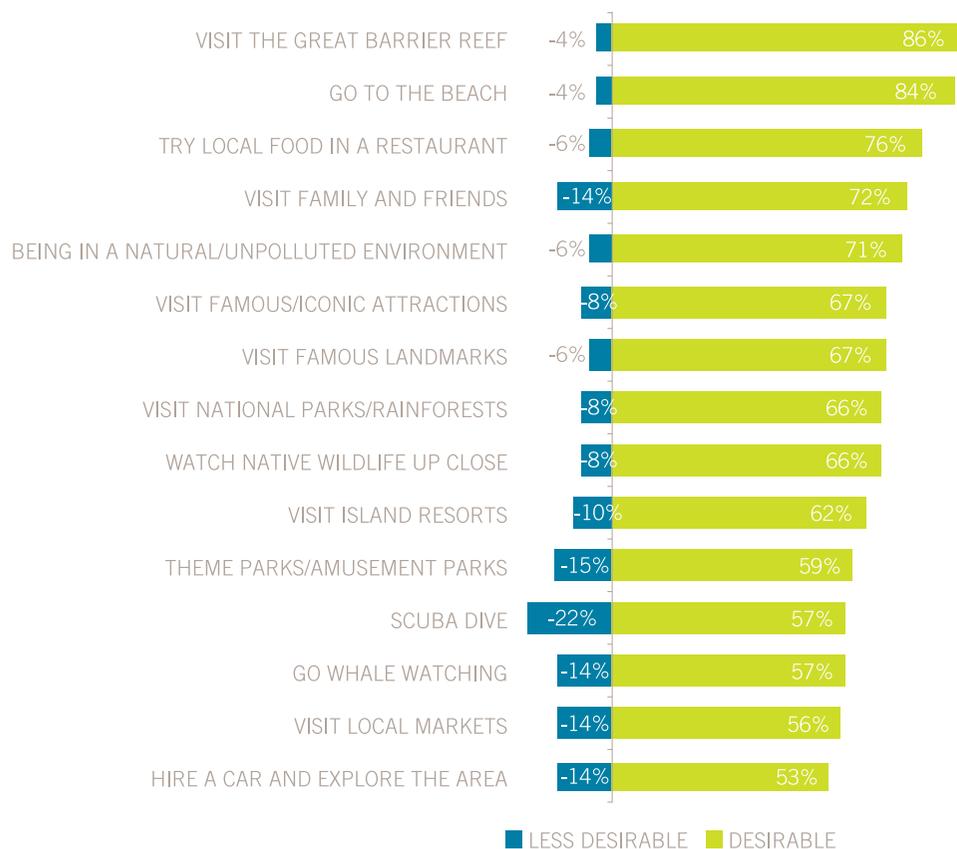
FIGURE 2: PREFERRED EXPERIENCES ON HOLIDAY IN QUEENSLAND



Visiting the Great Barrier Reef (86%), going to the beach (84%) and trying local food (76%) were things that Chinese residents were looking forward to doing most when on holiday in Queensland.

Interestingly, Chinese residents living in Queensland were more likely than those in other parts of Australia to want to experience a rural/countryside experience.

FIGURE 3: ACTIVITY PREFERENCES ON HOLIDAY IN QUEENSLAND



“The saying goes... ‘if you don’t visit the Great Barrier Reef when in Australia, it’s like you never came to Australia’. We’ve been to Australia many times but still have never managed to go to the Great Barrier Reef, so we really hope to visit one day.”

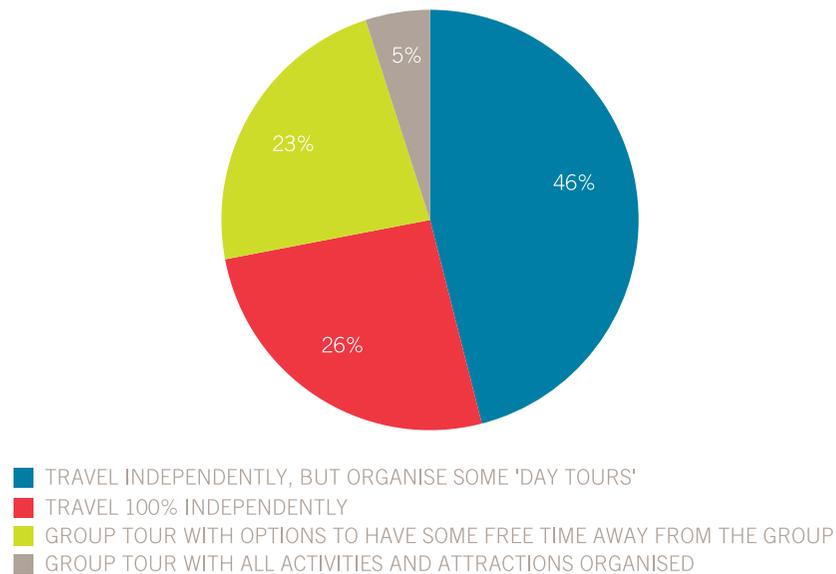
“There is also a Gold Coast in China... it was named after the silver sand... now, there’s also a Gold Coast in Queensland and I would like to see how it compares to the one in China.”

“Everyone says the Gold Coast is great. It’s famous. It has the longest beach (compared to Sydney).”

INDEPENDENT TRAVEL VERSUS GROUP TOURS

A large proportion of Chinese residents would prefer to visit Queensland independently and take part in a few day tours (46%), or to travel completely independently (26%). Just over one in four would prefer to visit Queensland as part of a group tour.

FIGURE 4: TRAVEL PREFERENCE FOR QUEENSLAND HOLIDAY

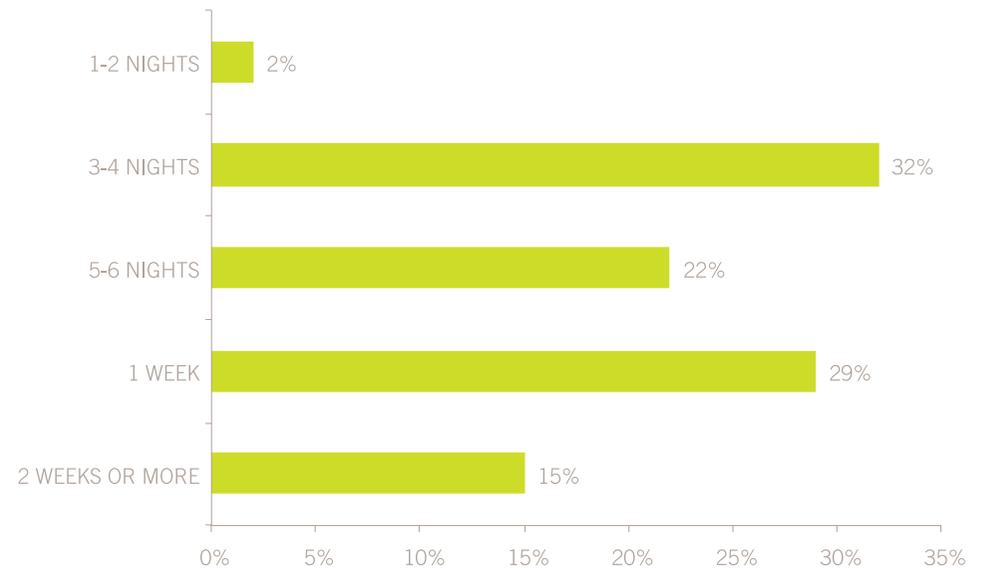


LENGTH OF HOLIDAY

A weekend is not long enough, most would prefer their stay in Queensland to last longer: 3-4 nights (32%); 5-6 nights (22%); or a full week (29%) were mentioned most often.

Preferred travel time was spread over the whole year with (relatively low) peaks in April (12%), July (13%), and December (16%).

FIGURE 5: IDEAL LENGTH OF HOLIDAY IN QUEENSLAND



MEALS, ACCOMMODATION AND TRANSPORT

MEALS	ACCOMMODATION	TRAVEL
<p>Chinese residents prefer to eat:</p> <ul style="list-style-type: none"> ■ either a combination of traditional Chinese and Australian or Western meals (44%) ■ or exclusively Australian or Western meals (41%). <p>This preference was consistent across meal types.</p>	<p>Preferred accommodation for a stay in Queensland:</p> <ul style="list-style-type: none"> ■ serviced apartment (51%) ■ standard hotel (46%) ■ rented house or apartment (37%). <p>Most visitors look for:</p> <ul style="list-style-type: none"> ■ clean and comfortable accommodation (89%) ■ friendly service (86%) ■ free Wi-Fi (81%) ■ air conditioned rooms (75%). 	<p>Preferred transport options to get to Queensland:</p> <ul style="list-style-type: none"> ■ air transport (87%) ■ private/own vehicle (24%) ■ rented/hire vehicle (24%) ■ railway/train (24%). <p>Preferred transport options in Queensland:</p> <ul style="list-style-type: none"> ■ bus/coach (50%) ■ rented/hire vehicle (50%) ■ walk (47%).

PERFECT HOLIDAYS FOR DIFFERENT AGE GROUPS

An ideal Queensland holiday for older Chinese started with crossing world famous attractions off the list to be able to say that they have seen them with their own eyes.

Their ideal holiday included:

- being with their family
- visiting well known landmarks – the more the better
- enjoying foreign cuisine in addition to traditional Chinese food
- eating fresh local produce unique to the destination
- experiencing mild weather
- seeing few Chinese tourists
- having a nature oriented experience (preferably with a large ‘wow factor’).

Younger Chinese residents living in Australia sought the same elements but with an added adventure element.

OLDER

Seek value for money from a tour; all attractions and destinations are communicated up front.

Use tour operators; open to suggestions from the experts.

Light researchers (with limited information channels).

YOUNGER

More likely to travel with friends as many of their parents and family are in China.

Self-directed and self-drive holidays are increasing in popularity.

Excited by the potential to seek adventure as their language proficiency increases.

PLANNING AND BOOKING

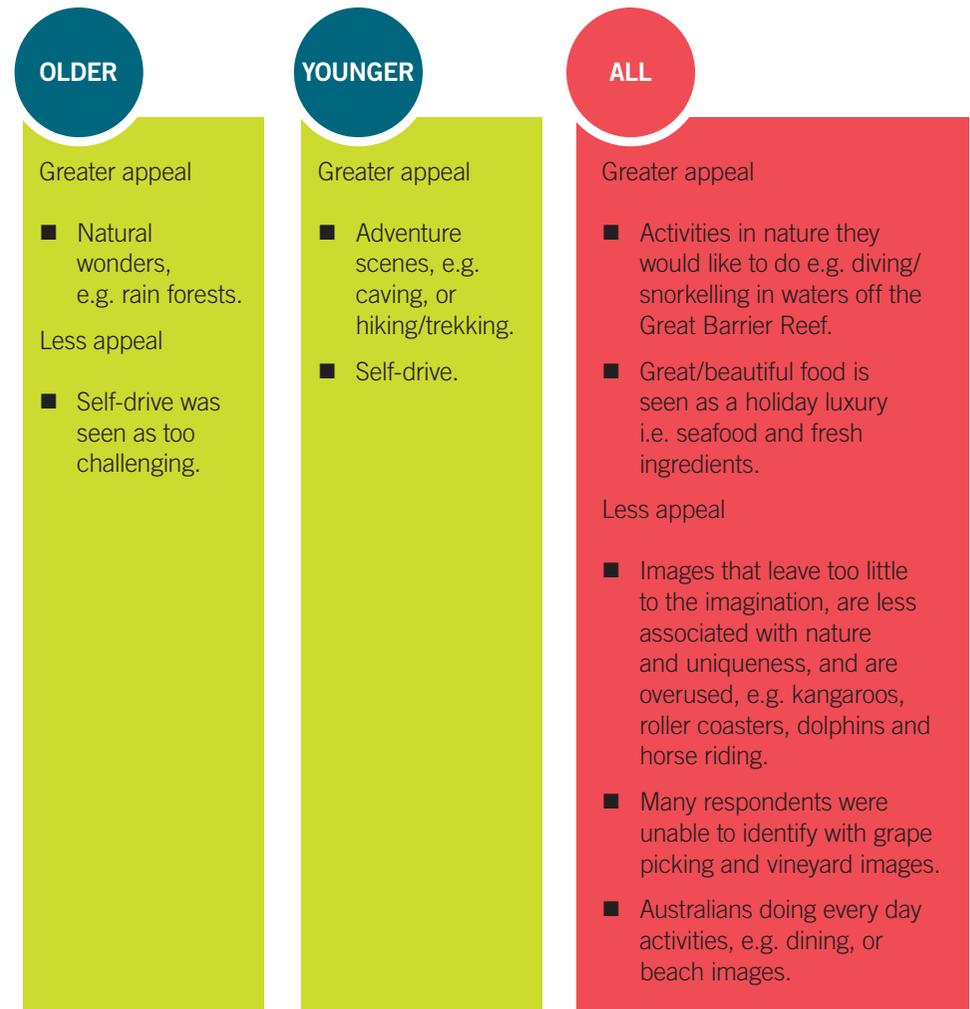
All respondents were asked to imagine they were planning a holiday to Queensland. The majority (63%) preferred to research, plan and book their holiday themselves, while 29% preferred to research and plan themselves, but to book through a travel agent.

PLANNING AND RESEARCH	BOOKING	AT THE DESTINATION
<ul style="list-style-type: none"> ■ 63% - plan holiday themselves ■ 46% - talk to family, friends or colleagues ■ 45% - visit traveller experience websites ■ 39% - use travel agent brochures 	<ul style="list-style-type: none"> ■ 64% - use airline websites ■ 58% - use online booking sites ■ 52% - use traveller experience websites ■ 40% - use hotel websites ■ 29% - use travel agents 	<ul style="list-style-type: none"> ■ 70% - use mobile phones ■ 67% - use laptops ■ 58% - use tablets ■ Under half would also talk to hotel or information centre staff

Websites and brochures in the Chinese language as well as travel agents specialising in their demographic group were important to around two in five Chinese residents.

COMMUNICATIONS AND IMAGERY

Respondents found they were drawn to imagery that represented an activity they would like to do, or reflected their personal interests.



CONCLUSIONS AND RECOMMENDATIONS

The research identified three market segments based on travel and tourism needs, desired experiences and demographics.

Marketing campaigns designed to target Australia's Chinese community need to recognise the varying requirements of these segments.

MARKET SEGMENT	CHARACTERISTICS	MARKETING IMPLICATIONS
1: New entrants	<ul style="list-style-type: none"> ■ Includes recent migrants and older Chinese residents in Australia. ■ Seek to personally experience Australia's and Queensland's key attractions. ■ Have a limited knowledge of the range of attractions in Queensland beyond the Great Barrier Reef and the Gold Coast. ■ May experience language barriers and therefore prefer guided tours. ■ Seek out destinations they consider unique to Australia. 	<ul style="list-style-type: none"> ■ The Great Barrier Reef is a key drawcard followed by the Gold Coast. These attractions need to feature prominently in any marketing to this group and feature in tour packages. ■ Build awareness and knowledge about destinations and experiences that are available outside the Great Barrier Reef and Gold Coast to provide other reasons to visit Queensland. This will deliver greater value to visitors who want to see as many attractions as possible during their holiday. ■ Focus on the elements that differentiate Queensland from other destinations in Australia. Natural attractions such as rainforests, islands and white sandy beaches need to feature prominently in any marketing imagery. ■ Recognise that language barriers may exist for this segment so communication via Chinese language media is important (e.g. newspapers such as Ausdaily Chinese and Sing Tao Daily and Chinese language programs on SBS). ■ Provide resources for Chinese speaking travel agents and tour operators as travellers rely on them for information and advice.

MARKET SEGMENT	CHARACTERISTICS	MARKETING IMPLICATIONS
2: Independent	<ul style="list-style-type: none"> ■ Includes younger Chinese residents living in Australia and those who have been living in Australia longer. ■ Visit well-known attractions but seek a more experiential holiday and have a greater desire for adventure. ■ Want to get off the beaten track and experience local holiday experiences such as self-drive, caravanning and day trips to destinations where Australian locals holiday (rather than other Chinese tourists). 	<ul style="list-style-type: none"> ■ The Great Barrier Reef and Gold Coast are still key attractions to this segment. Marketing for these destinations should highlight packages for independent travel as well as group tours. ■ Include small group tour and independent travel options. ■ Language is less of a barrier for this group and therefore they can be targeted by all media channels, particularly: <ul style="list-style-type: none"> – social media and social networks (e.g. Facebook, Renren and Weibo) – travel blogs and forums (e.g. Trip Advisor, OzYoyo, Our Steps) – tour operators at destination (English speaking).
3: Indifferent	<ul style="list-style-type: none"> ■ Includes those who have lived in Australia for longer than three or four years and are slightly younger. ■ The newness of living in Australia has worn off and some are beginning to seek experiences outside Australia. 	<ul style="list-style-type: none"> ■ The prime time to motivate a Chinese person living in Australia to visit Queensland is in the first two or three years of living in Australia. ■ Travel and tourism packages focused on introducing new migrants to Australia will have the greatest impact during this early stage.