



Understanding the Chinese Independent Traveller

In the year ended June 2012, visitors from China accounted for 12% of all visitors to Queensland. In total, they spent \$421 million in the State, an increase of 14% on the previous year¹. Chinese visitors to Australia have the potential to grow to between \$7.4 billion and \$9.0 billion in total expenditure by 2020²

Chinese independent travellers have been identified as a growth market for Queensland. This opportunity has resulted from a range of interconnected factors including: an increase in direct flights from China; an easing of travel restrictions across many regions in China; efficiencies in the visa application process; and greater access to the internet in China. The main catalyst is an increase in Chinese travellers considering independent travel, in particular those aged between 25 and 40 years of age. Key indicators suggest that the Chinese group tour market will also remain an important market for Queensland.

To improve our understanding of Chinese independent travellers and our capacity to attract this growth market, in 2012 Tourism Queensland commissioned research by

GfK Custom Research China. The research was conducted with Chinese independent travellers that have previously travelled outside of Asia independently (i.e. not on a group tour or for business). This factsheet explores the key findings on Chinese independent travellers.

In the China market, independent travellers refer to those who structure their own travel. They search for information themselves and make decisions based on their experiences, internet research and recommendations from friends, relatives or social media rather than the travel packages available. Structuring their own travel may include making some purchases through a travel agent, such as flights, accommodation and visas or perhaps even an itinerary (that includes some free days).

A quick snapshot of Chinese Independent Travellers

The majority:

- Can speak some English
- Have a university education
- Are married with children
- Are under 50 years of age
- Are confident experienced travellers
- Want flexible travel options
- Want to experience and enrich their knowledge of a different culture
- Like to eat local food and spend time with local people
- Are internet savvy
- Are heavy travel researchers and planners
- Are likely to have travelled outside of Asia previously





Their recent travel habits

- Europe is the destination outside of Asia most visited by Chinese independent travellers. Other prominent destinations include North America and Oceania.
- On their last independent trip outside of Asia they typically travelled with family members (parents and other relatives) or with their spouse. It was also common for those under 30 years of age to travel with friends or colleagues.
- The majority were away from home for 6 to 10 nights on their last independent trip outside of Asia.

This group of travellers prefer independent travel over group travel. They enjoy the freedom of following their own schedule and having greater control over what they do, eat and see.

What they want when travelling outside of Asia

Chinese independent travellers want to relax and unwind while visiting places with great natural attractions and world famous sights. They want to enjoy the comforts of a developed country and experience a different culture. Often on their holiday agenda is learning something new, natural

When on holidays they want to feel happy, comfortable, in tune with nature and carefree.

and man-made attractions and a good mix of activities that provide value for money. Australia is perceived as a place that is able to deliver this kind of holiday experience⁴.

How they want to feel when travelling outside of Asia

Chinese independent travellers summarise how they want to feel on holidays as cosiness, curiosity, passion and trust. Cosiness is the feeling most desired and is described as happiness, true enjoyment, not having a care in the world and being

in a clean pristine environment. Curiosity is the ability to gain knowledge while enjoying yourself or trying something on impulse. Passion is doing what you want (pursuing dreams) and reconnecting with loved ones. Trust is being in a safe, unpolluted environment with good safe food.

Barriers to travel outside of Asia

The number one barrier for travel outside of Asia noted is 'language'. However, Chinese independent travellers are not as concerned with language barriers as less experienced Chinese travellers⁴. In addition, this barrier is less of a concern when considering a visit to Australia as most Chinese independent travellers can speak some English.

Other barriers to travel outside of Asia noted by a small proportion of respondents were the visa application process, limited information about the destination and safety concerns at the destination.



Their thoughts on Australia

Australia is a 'must visit' holiday destination amongst Chinese travellers⁴.

Chinese independent travellers are interested in Australia as it has the comforts of a developed country and attractive natural assets. Drawcards for Australia include: the beaches, the world famous attractions and landmarks, the fresh and local food (e.g. seafood and cheese), the Great Barrier Reef and island resorts and the exotic animals, particularly the kangaroo.

Perceptions of Queensland are limited. The Great Barrier Reef, stunning natural scenery, diverse wildlife or sunny beaches were mentioned by a small proportion of respondents.

About Australia...

"The nature there is very good"

"Ecologically diverse"

"People there seems to live a very leisurely lifestyle"

"A clean place. Devoid of pollution"

"Great weather"

"Great seafood"

Their trip planning process

Chinese independent travellers are considered 'heavy' trip planners, they do a lot of research when planning travel outside of Asia. They tend to actively begin their trip planning one to three months before the departure date. Often the conscious decision to take the holiday is triggered by personal annual leave, public holidays or a special personal occasion (e.g. honeymoon, birthday or anniversary).

Chinese independent travellers are internet savvy and it is their number one trip planning source. Nine in ten Chinese independent travellers use the internet when planning and booking their trip. Search engines are popular as well as airline websites, websites where travellers can share their experiences, online travel agents and hotel websites. Friends, family and colleagues as well as online newsletters and emails are also important holiday planning sources.

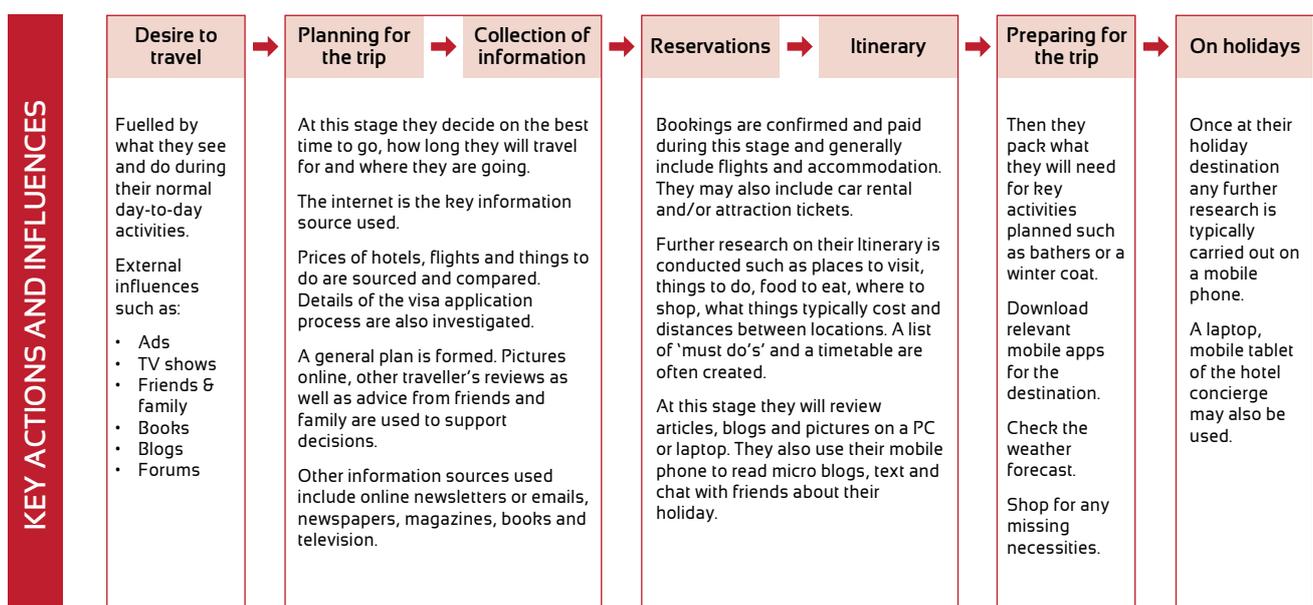
The Chinese independent traveller's planning process includes a number of steps. These steps do not necessarily proceed in a linear manner:

1. Desire to travel awakened – they do not necessarily 'seek out' information at this stage. Generally this stage is fuelled by something they see or hear during their normal day-to-day activities
2. Planning for the trip – at this stage they decide when is the best time to go, where they will go and for how long



3. Collection of information – the internet dominates this stage and a general plan is formed
4. Reservations – bookings are confirmed and paid
5. Itinerary – a list of 'must do's' is created and a timetable
6. Preparing for the trip – packing things they need for the trip (including downloading mobile apps) and checking the weather forecast
7. On holidays – any further research is typically conducted via mobile phone or tablet

THE TRIP PLANNING PROCESS USUALLY TAKES 1-3 MONTHS





Marketing Hints

- In China the preference for independent travel is more related to lifestyle and attitude than demographics
- Consider how to best capture how Chinese independent travellers want to feel on holidays in the tone and phrasing of copy
- Use iconic natural and man-made attractions in marketing collateral. In addition, showcase attractions and landscapes that highlight their special or unique features
- Avoid just using Chinese talent in collateral, Chinese Independent Travellers like to experience the local culture and see locals enjoying the experience
- Demonstrate that there is a good mix of activities available at the destination
- Chinese Independent Travellers look for goods and services that provide good value for money
- Avoid overly adventurous imagery and language in marketing materials
- Chinese independent travellers are internet savvy and the internet is a key trip planning tool

- On holidays, independent travellers are more likely to use their mobile phone (or tablet) as an information source than the hotel concierge. They use their mobile phone or tablet to store apps for use on holidays and for any further planning during the holiday
- Chinese independent travellers are heavy planners that are interested in detailed information about the destination. Practical travel advice appeals to this market, such as where to access Wi-Fi, weather forecasts, and information about how and where to access prepaid mobile SIM cards.
- Websites with easy navigation and eye catching pictures are desired and will help build a positive impression of the destination
- Provide Chinese Independent Travellers the opportunity to create their own itinerary and package inclusions by offering flexible booking options

For further information on all Chinese travellers and Chinese tour group travellers, please see [The Chinese Traveller, A segmentation of the China market](#) and [Knowing The Customer in China](#).



1. Tourism Queensland's China Market Snapshot Year Ending June 2012

2. [Tourism Australia's China Market Profile 2012](#)

3. Research was conducted with Chinese residents aged between 25 and 49 years with an annual household income of RMB 10,000 or more who have travelled outside of Asia independently (i.e. not on a business trip or part of a group tour) in the last five years. Initially focus groups were conducted in Shanghai and Guangzhou, followed by face-to-face surveys with 750 respondents in Beijing, Shanghai and Guangzhou.

4. [Tourism Australia's Knowing The Customer in China – Research Update – March 2012](#)