

Western Australia's Place in the Chinese Tourism Boom

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By

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and

LH Global Pty Ltd



Front and rear cover: Jurien Bay Jetty, WA - Picture provided by LH Global Tours
Inside cover: Near Monkey Mia, WA - Picture provided by LH Global Tours



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Executive Summary

China's tourism boom has attracted global attention from governments and industry; tourist destination countries and regions are keen to attract lucrative Chinese tourists to benefit their economies. While China has proven to be Australia's largest and most valuable inbound tourist market, Chinese tourist flows and dispersals among Australian states are unbalanced. *Western Australia (WA), despite occupying one-third of the country's land mass, continues to receive a proportionally low share of Chinese tourist arrivals.*

The purpose of this research was to critically assess WA's tourism provisions and resources toward the Chinese market and provide research-informed recommendations for the WA tourism industry to better develop the Chinese tourist market in the future.

Numerous types of Chinese tourists visit Australia based on diverse motivations. The academic literature shows that Chinese tourists visit Australia to broaden their horizons, relax, and have fun. The Chinese middle class visits Western countries like Australia as a way to showcase their social esteem and status. Australia's world-class natural environment, featuring fresh air, blue skies, unspoiled beaches, and unique animals, is especially attractive to Chinese tourists. In addition, Australia enjoys a reputation as a safe destination, providing quality food and wine and a variety of aquatic/coastal tourist activities.

This report elaborates on three types of Chinese tourists to Australia: business and corporate travellers, young and student travellers, and holiday tourists. In the context of WA tourism, *free and independent travellers (FITs) from the greater China region should be targeted although small-scale packaged tours from China remain popular.* An increasing number of Chinese tourists also seem interested in self-driving tours, including those using recreational vehicles.

Most Australian states have developed state-specific tourism strategies in an effort to develop the Chinese tourist market. Some states have also formulated China-focused tourism strategic plans, a worthwhile endeavour to help WA tourism authorities further tap into the Chinese market.

A number of tour operators in WA are targeting Chinese tourists. Most of these operators have a Chinese background and employ Mandarin-speaking staff. *Two major tourism products are currently offered to Chinese tourists in the WA market: customised tour packages and pre-arranged tour packages.* The former are more personalised, while the latter are more structured with fixed dates, times, and itineraries. Tour length can vary from 1 to 14 days, with most tours lasting around 3-4 days. Popular attractions among Chinese tourists in WA include the Pink Lake, sandboarding in Lancelin, the lobster farm at Cervantes, Margaret River wineries, snorkelling and guided nature walks on Abrohlos Island, and dolphin feeding at Monkey Mia.

“...academic literature shows that Chinese tourists visit Australia to broaden their horizons, relax, and have fun.”

This research identifies 5 major challenges facing the WA tourism industry in drawing the Chinese market:

- Low market awareness
- Geographic distribution of tourist attractions
- Lack of telecommunication infrastructure across regions
- Lack of Chinese market knowledge and skills among service staff
- Lack of a world-class hospitality service standard

Based on multi-faceted analyses of academic literature, online archives, interview data, and field trips, our research team devised the following 4 recommendations:

1

We encourage the development of a thematic tour-guiding and interpretation system addressing WA's flora, fauna, history and heritage. Such information will help WA's tourism industry impress Chinese tourists on group tours by emphasising the region's unique vegetation, ecological system, wildlife, early settler history, and aboriginal culture.

2

We suggest that the tourism industry closely monitor Chinese market diversification and target niche markets. *Chinese Free Independent Travelers ("FIT"), inter- and intra-state Chinese students, and "Chinese grey nomads" deserve special attention given their growing importance in the WA context.*



Picture provided by LH Global Tours



Surfing WA - Picture provided by LH Global Tours

3

As a particular focus, we recommend that the WA tourism industry and its associated sectors work more diligently to *boost the self-driving Chinese tourist market*. Government agencies, industry associations, car rental companies, and other stakeholders should strive to offer a safer, more convenient, and more user-friendly self-driving tourism environment for Chinese tourists in WA.

4

We strongly suggest that the WA tourism industry and its players *remain alert and sensitive to the disruptive nature of new technologies and their tourism applications*. Specific to the growing Chinese tourist market, one strategy is to *maintain a localised value chain geared towards Chinese tourists*. WA tourism businesses may struggle to realise business innovations and value-chain localisation on their own. Establishing strategic partnerships and collaborative relationships with tourism businesses in China is highly recommended.

To implement the above recommendations, multi-stakeholder collaborations involving industry, government, and universities will prove indispensable. Our research team, which currently consists of university-based researchers and industry practitioners, welcomes interested stakeholders to join hands in pursuit of these goals.



COVID-19 (novel coronavirus) and this report

The research reported herein was conducted before the outbreak of novel coronavirus pneumonia (COVID-19); therefore, the impact of COVID-19 on WA tourism is not covered in this report. However, we would speculate that Chinese tourists may prefer an outbound destination such as WA, whose natural beauty and refreshing environment could reinvigorate them, following the COVID-19 crisis. The issues and recommendations outlined in this report are thus future-proof.

“Younger generations of Chinese travellers are also beginning to prefer more independent travel as an alternative to group tours”



1. Introduction

Globalisation has changed our world dramatically. Tourism has come to play an increasingly important role in national economies since the turn of the century, and China has emerged as a significant international player in this regard. According to China Tourism Academy (2019), the number of Chinese outbound tourists reached roughly 149.7 million in 2018, with an outbound tourist expenditure totalling US\$ 120 billion. Figure 1 shows the trend line of the development of China outbound tourism after the century. China's tourism boom represents a transformational force in the world, attracting increasing attention from policymakers in many countries.



China is Australia's most valuable inbound tourist market. According to Tourism Australia (2019), in the year ending June 2019, Australia recorded 9.3 million international tourist arrivals, of which 1,432,800 (15.4%) were from China. China also contributed A\$12 billion to Australia's tourist spend – 26.9% of the total international tourist spend in the country (Figure 2). However, the dispersal of Chinese tourists in Australia is currently unbalanced across states. While New South Wales, Victoria, and Queensland generally receive most inbound Chinese tourist flows, other states' shares of the inbound Chinese visitor market remain disproportionately low.

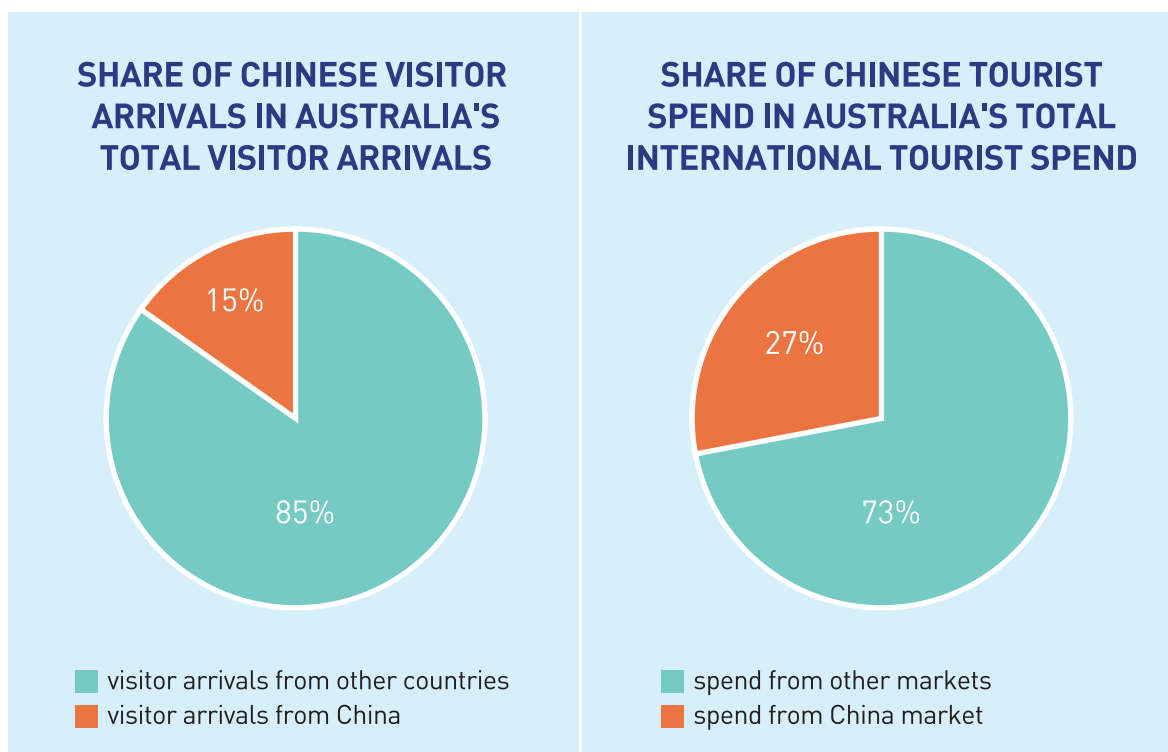


Figure 2. Shares of Chinese inbound tourism in Australian tourism

Western Australia (WA) is Australia's largest state, accounting for one-third of the country's land area. Compared to other Australian states, WA has an advantage in sharing the same time zone with China and being close to China geographically. According to Tourism Research Australia, in the year ending September 2019, Australia received a total of 1,331,428 visitor arrivals from China. Of these, only 72,419 visitor arrivals, or 5.4%, were accommodated by Western Australia (figure 3). Although China is Australia's largest international market by leisure visitors, it is only the 5th largest leisure visitor market to WA. From a marketing perspective, China holds great development potential as a future inbound visitor market to WA. This report, developed jointly by Edith Cowan University (ECU) and LH Global, intends to offer the WA tourism industry and relevant practitioners an overview and detailed analysis of WA's position, resource endowment, competitive advantages and disadvantages, and possible future actions to be taken to boost the Chinese tourist market.



Figure 3. Visitor arrivals from China to Australian states (Year ending September 2019)
Data Source: Tourism Research Australia

2. Study purpose and objectives

The overall purpose of this study was to (a) conduct a critical assessment of WA's tourism provisions and resources for the Chinese market and (b) provide research-based recommendations to help WA's tourism industry cope with market competition and product development around this market. Specifically, this study was guided by the following objectives:

- to critique and identify reasons why WA has fallen behind other Australian states in growing the Chinese tourist market;
- to assess current tourism provisions for the Chinese tourist market;
- to explore consumers' expectations of Chinese travellers visiting WA as a tourist destination;
- to identify the gaps of WA tourism in meeting the demands/needs of the Chinese tourist market; and
- to provide strategic development directions and recommendations for the future development of WA's tourism industry toward the Chinese tourist market.

***“eager to broaden
their horizons,
relax, and have fun”***

The Pinnacles, near Cervantes WA - Picture provided
by LH Global Tours

3. Methodology

This study involved a mixed-methods investigation.

Desktop archival research was performed to collect academic literature pertaining to Chinese tourists' behavioural characteristics and preferences in Australia. Secondary online data were gathered regarding Australian states' Chinese-specific marketing plans and strategies as well as WA's destination regions, tourism resources and provisions, and relevant tourism statistics.

Seven in-depth interviews were conducted with key WA tourism operators targeting the Chinese tourist market. The current landscape of tourism product provisions for Chinese tourists in WA was surveyed through these interviews.

The ECU researchers joined two group tours to conduct participant observations: one from Perth to Kalbarri, lasting 3 days; and another one-day tour from Perth to Margaret River. In addition, the ECU researchers took a 6-day self-driving tour from Broome to Fitzroy Crossings to examine tourism offerings in the Kimberley Region.

Data from archival academic journal articles, interview transcripts, and fieldwork notes were analysed and supplemented by the researchers' critical reflections to identify key findings in this project.

Study Results

4.1 Chinese tourists in Australia

The Chinese tourism market to Australia has continued to expand over time. Gaining Approved Destination Status in 1999 sparked early market growth; this allowed Chinese tourists to visit Australia relatively easily (Tourism Research Australia, 2019a). Government-backed initiatives and an emphasis on marketing and branding have since highlighted Australia as a unique destination. According to Australian Tourism Statistics (2019), 8.8 million people visited Australia from overseas in 2017, a 6.6% increase over the previous year. Chinese tourists, Australia's largest source market, spent A\$10.4 billion in Australia in 2017, and 679,354 came on holiday; the most popular destinations were Sydney (62%), Melbourne (50%), and the Gold Coast (25%). However, as China hosts 1.38 billion people, less than 1% of Chinese nationals visited Australia in 2017. In 2018, China saw 149.7 million outbound trips from its nationals (China Tourism Academy, 2019); of these trips, Australia recorded 1.316 million arrivals from China (Tourism Research Australia, 2019b), accounting for approximately 0.9% of the total share of China outbound tourism (Figure 4). As shown above, roughly 5% of those tourist trips from China to Australia were accommodated in Western Australia.

Chinese tourists to Australia tend to be relatively affluent and often come from larger cities such as Shanghai, Beijing, Guangzhou, and Shenzhen (Connell & McManus, 2019). However, overseas travel is becoming more popular among the Chinese in general. The proportions of tourists visiting from smaller Chinese cities continue to grow due to greater visa and flight accessibility. China's economy is also expanding, which has enabled more Chinese tourists to visit Australia (Pham, Nghiem, & Dwyer, 2017). The ongoing rise of the Chinese middle class is expected to continue to drive Chinese tourists to the country.

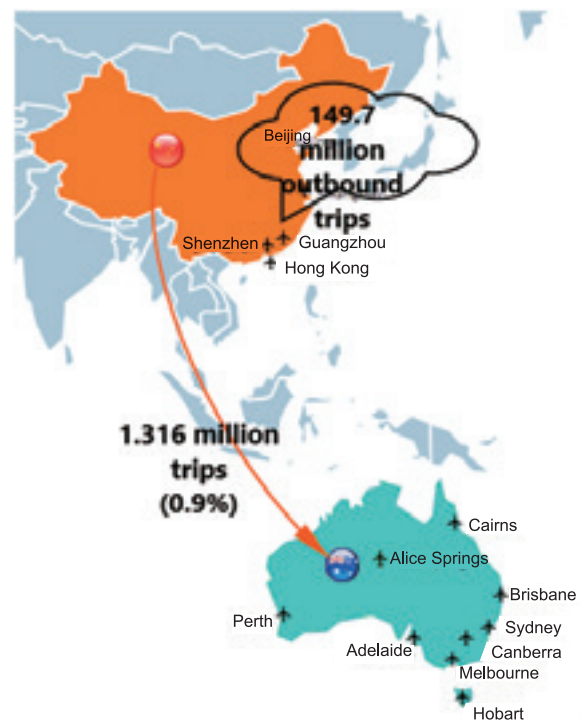



Figure 4. Chinese outbound trips to Australia (2018)

Tourist motivations

Chinese tourists to Australia share travel motivations with other Asian travellers and source markets. They are eager to broaden their horizons, relax, and have fun. Interestingly, the Chinese middle class is also keen on experiencing and imitating the West (Tourism Research Australia, 2019a). Social esteem is a key component of Chinese culture, and Chinese tourists tend to use travel to flaunt. One-of-a-kind experiences are essential to this pursuit. Whereas the Chinese previously travelled via group tours to sightsee, today's tourists are becoming more discerning. They still enjoy common activities like local festivals, cultural activities, and sporting events (Fredline & Jin, 2017). But many are seeking fresh experiences and come to Australia with more specific goals in mind: avoiding pollution, taking in the country's natural beauty, and participating in unique leisure activities (Connell & McManus, 2019). Younger generations of Chinese travellers are also beginning to prefer more independent travel as an alternative to group tours.

Australia's varied topography offers many options for leisure, and the country's clean air and natural scenery stand in stark contrast to the environment of Chinese cities. Chinese tourists are particularly captivated by Australia's reputation for safety and security, food and wine, and aquatic/coastal activities. Many Chinese tourists visit Australia to indulge their sense of adventure. From the coast to the outback, diverse nautical and land-based experiences abound. The sprawling rural landscape in certain regions, including WA, is ideal for outdoorsmanship. For example, young Chinese tourists have taken to exploring caverns and gorges via recreational vehicles (RVs). RV travellers from China are especially interested in getting to know Australia's environment and culture. Similar to other Chinese tourists, they are also eager to escape everyday life, relax, and enjoy novel experiences (Wu & Pearce, 2014). RVs tick all these boxes. This travel mode is not well-known in China, so tourists can simultaneously try something different, explore a new place, and earn recognition from friends back home.



“Chinese students constitute the largest proportion of Australia’s international student travel market”

The Pinnacles, near Cervantes WA - Picture provided by LH Global Tours



Winery, Margaret River - Picture provided by LH Global Tours

Some Chinese are keen to explore Australia's food and wine scene. Wine is a growing niche interest in China, and travellers are becoming more curious about what other countries have to offer. Although winery-specific travel to Australia is still somewhat uncommon among the Chinese, this market is developing. Today's tourists are interested in trying different wines and may visit wineries as part of a broader travel itinerary (Gu, Zhang, King, & Huang, 2017). Winery tours also give tourists a chance to take in the natural beauty of Australia's wine regions, such as WA's Margaret River area, and to enjoy complementary meals. Similar to RV tours, winery visits offer another way for Chinese travellers to showcase their elegant lifestyle and tastes.

"...Chinese are keen to explore Australia's food and wine scene."



"...captivated by Australia's reputation for food and wine, and aquatic/coastal activities"

Mandurah Cruises, Mandurah WA - Picture provided by LH Global Tours

Main Chinese tourist types

Business and corporate travellers. A considerable number of Chinese travellers visit Australia for business purposes, comprising 7% of total tourist arrivals as of 2016 (Tourism Australia, 2017). Business and corporate visitors to Australia have high expectations and generous budgets. Because governmental or business departments often subsidise business-related trips, money is less of an object for this tourist segment than for others (Kwek & Lee, 2013). Their travel is also rarely limited to business; trips are often arranged by tourism operators to include shopping and sightseeing in groups. These tourists also tend to visit multiple destinations over the course of a single trip.



Chinese business travellers consider tourism as a way of modern lifestyle, and thus prefer high-class accommodations and fine dining. This tourist group is inherently image-conscious with a focus on material consumption and social status (Kwek & Lee, 2013). When purchasing products and souvenirs, they focus on fashion and branding; luxury- brand goods are especially popular. These travellers also greatly prefer upscale accommodations and package tours over hotels/motels and independent tours (Pan & Laws, 2002). Culturally, these tourists are highly attentive to 'face' (mianzi) and networking (guanxi) when interacting with colleagues in Australia. They recognise the importance of respecting one's superiors and ensuring positive relationships, such as through gift giving and socialising (Kwek & Lee, 2015). Consumerism is inherent to these tasks. For instance, wealthy Chinese businesspeople are expected to dress in a way that conveys their social status and ensures they will be perceived favourably by colleagues.



Young and student travellers. Young Chinese tourists have unique considerations when travelling overseas. These young tourists (between the ages of 18 and 35) often travel in small groups with family or friends. When choosing destinations, they focus on activity costs, travel time (i.e., from their place of origin to their destination and their general length of stay), and transportation convenience. They also consider a destination's climate and safety (Song, Wang, & Sparks, 2018). While Australia's warm, sunny weather and relative safety appeal to this travel segment, the distance between destinations could be a drawback. Many young travellers visit the country's major cities and do not venture far beyond them during their stay.

An important subset of young Chinese tourists is Chinese students, who constitute the largest proportion of Australia's international student travel market. In fact, students from mainland China comprise nearly one-fourth of all international students in Australia (Wang & Davidson, 2007). Chinese students generally appreciate Australia's climate and natural scenery (Hughes, Wang, & Shu, 2015). However, some may have safety concerns about outdoor activities such as bush walking and camping; adventure-oriented travel is generally unfamiliar to them. Like typical young Chinese tourists, student travellers are also concerned about activity costs as well as travel distance and time. They tend to take brief trips from their "home" cities where they are studying, as study consumes a fair amount of their time. When students do get the chance to travel in Australia, photography is one preferred way for them to capture memories in Australia and share their experiences with family and friends, most likely via the well-developed Chinese social media platform WeChat.

Holiday tourists. Holiday travellers to Australia often visit either through group tours or on their own. Group package tours are popular for several reasons (Hughes, Wang, & Shu, 2015). Some Chinese tourists are concerned about the language barrier in Australia and seek to mitigate this through guided trips. Others have little overseas travel experience, and group tours tend to be fairly structured: tourists can cover several "must-see" sites on a planned itinerary and at a reasonable cost. Yet other holiday travellers enjoy independent trips. Free independent travellers (FITs) represent the fastest-growing tourist segment to Australia. FITs are generally young, well-educated, and tech-savvy. They want value for their money. Rather than relying on travel packages, they develop their own itineraries based on internet research, recommendations from family and friends, and social media. They also tend to be more adventurous and stay longer than visitors on group or package tours.

Many holiday travellers are intrigued by Australia's warm climate, sunny conditions, and gorgeous beaches (Pan & Laws, 2002). Holiday tourists generally value authentic experiences and hope to become immersed in the local culture. They are also eager to learn and become more open-minded about the world. Therefore, these travellers look forward to exploring Australia's beaches and wildlife, meeting local people, and tasting local cuisine.



“Chinese students constitute the largest proportion of Australia’s international student travel market”

Weano Gorge, Karijini National Park - Picture provided by LH Global Tours

Product preferences

Chinese tourists are especially interested in nature-focused experiences when visiting Australia. They also have high expectations for these experiences – even on low-cost tours. Many nature-oriented package tours in Australia tend to be brief, fast-paced, and set in urban locations; however, Chinese tourists are often more satisfied with rural nature trips (Weiler & Chen, 2016). Many Chinese are unfamiliar (and thus uncomfortable) with encountering animals in the wild (Packer, Ballantyne, & Hughes, 2014). Yet they are interested in environmental issues, which contribute to these tourists’ excitement around nature-based trips.

In general, Chinese tourists are interested in discovering how Australians live (Destination New South Wales, n.d.). Tourists visiting on holiday may partake in a wide range of activities. These include sightseeing, shopping for name-brand products and unique local items, nightlife, and theatre and entertainment. In terms of nature-based experiences, Chinese tourists are interested in beaches, biking, photography, water and outdoor sports, and wildlife encounters.

Tourist satisfaction

Chinese tourists seem generally satisfied with their travel to Australia in several respects. According to a 2014 TRA report, almost all Chinese visitors (96%) were pleased with their personal safety and security while in Australia. They were also highly satisfied with Australians’ friendliness. More than three-quarters of tourists appreciated the country’s attractions. A large proportion (72%) also enjoyed Australia’s wine experiences, and nearly as many (69%) were satisfied with food and beverage options while visiting. Nature-based experiences are pivotal to Chinese tourists’ trip satisfaction. Nearly all visitors’ expectations for these experiences were either met or exceeded. These tourists were also more likely to be satisfied with their trips.

Despite Australia’s many alluring characteristics, some factors may deter the Chinese from visiting. Australia is an expensive country, and the high costs associated with an Australian holiday may not be feasible for all travellers (Pan & Laws, 2003). TRA’s 2014 report found that tourists were most disappointed with Australia’s value for money and shopping opportunities. Internet access (e.g., in rural areas) and the user-friendliness of visitor information centres were similarly disappointing. Limited transport options relative to Australia’s size can also discourage Chinese visitation, such as that by FITs. These tourists tend to value convenience when travelling from point to point, including easy air and rail access. Time represents another constraint for the Chinese. Because their holiday trips to Australia tend to be relatively brief, they may struggle to fit all they would like to see into one trip. Tourists whose nature experiences failed to meet expectations were more likely to be dissatisfied with their trip overall. These visitors were also less likely to recommend Australia as a destination to others.

4.2 Tourism development in WA

The tourism industry in WA continues to evolve. Different from other states, WA remains primarily dependent upon domestic tourism; only approximately 10% of the country's international tourism expenditure comes from WA. Government officials are striving to expand the state's domestic and international tourism markets. An energised economy, especially in the resource and business sectors, presents new and varied opportunities for tourism and hospitality. WA has the following tourism regions.

Golden Outback

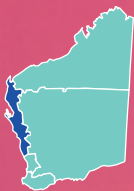
Key areas of the Golden Outback region include Kalgoorlie Boulder, Esperance, Narrogin, and Meekatharra. A popular attraction, Wave Rock, is a natural, weather-worn rock formation standing 15m tall and 100m long. The formation earned its name thanks to its appearance, which resembles a wave poised to crash. On the Golden Quest Discovery Trail, adventurers can explore Australia's storied gold rush history. The Golden Outback is also home to Esperance, known for its white-sand beaches, tranquil blue waters, and impressive national parks.



Wave Rock, Hyden - Picture Provided by LH Global Tours

Coral Coast

The Coral Coast's six major destinations are Geraldton, Indian Ocean Drive, Kalbarri, Wildflower Country, Shark Bay, and Ningaloo. As its name implies, the Coral Coast offers an array of nautical activities. Geraldton is an ideal place for pursuits related to art, culture and history, and general entertainment. Kalbarri, a nature lover's paradise, has options for bird watching, hiking, and kayaking. Ningaloo is home to coral reefs and related excursions – not only swimming, but also snorkelling with manta rays, turtles, and whale sharks. The UNESCO Ningaloo Coast World Heritage Area was listed in 2011 thanks to its unique flora and fauna.

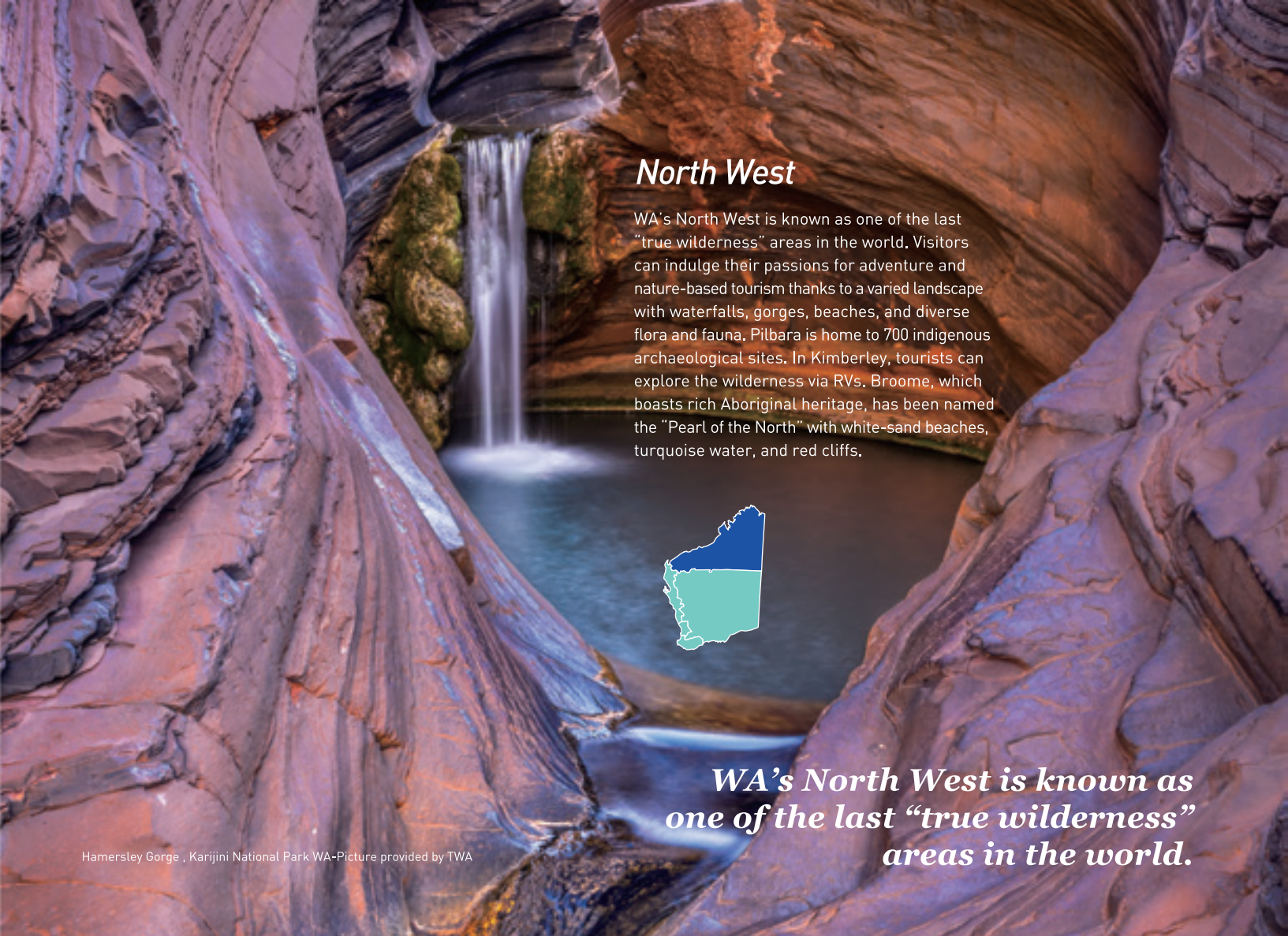


Hutt Lagoon ("Pink Lake"), Port Gregory WA - Picture provided by LH Global Tours and Auwe Travel

South West

WA's South West region is home to 1,000km of coastline. The area is known for blue oceans as well as fine wineries and restaurants. The South West region consists of places such as Pemberton, Margaret River, Albany, Bunbury, Dunsborough, and Busselton. The Margaret River region is world-renowned for its indulgent wine and food. Bunbury is home to the Dolphin Discovery Centre, caves, and lighthouses. Busselton offers cruising, diving tours, and recreational boating. Many accommodation options are available in the South West region, from motels/hotels and bed and breakfasts to backpacker lodges and farm stays.





North West

WA's North West is known as one of the last "true wilderness" areas in the world. Visitors can indulge their passions for adventure and nature-based tourism thanks to a varied landscape with waterfalls, gorges, beaches, and diverse flora and fauna. Pilbara is home to 700 indigenous archaeological sites. In Kimberley, tourists can explore the wilderness via RVs. Broome, which boasts rich Aboriginal heritage, has been named the "Pearl of the North" with white-sand beaches, turquoise water, and red cliffs.



WA's North West is known as one of the last "true wilderness" areas in the world.

Hammersley Gorge , Karijini National Park WA-Picture provided by TWA



Destination Perth

The capital city of Perth is sunnier than any other capital city in the country. Visitors can take a swim in the Indian Ocean, tour the vineyard in Swan Valley, or explore Aboriginal history. The portside town of Fremantle offers a wealth of colonial history. Tourists can relax on Rottnest Island's many beaches and take photos with quokkas, a unique cheerful marsupial in WA. King's Park in Perth is one of the world's largest inner-city parks. The city also has a thriving food and beverage scene, including bars and nightlife.



City of Perth - Picture provided by LH Global Tours

Major attraction types

WA's breathtaking landscape and environment consistently bring tourists to the region. The area's coastal setting is especially compelling. Eco-tourism, which focuses on nature-related education and conservation, draws tourists to WA as well. Chinese tourists are also interested in Australia's history, including Aboriginal experiences. Unusual experiences, such as self-drive tours through the Golden Outback, enable tourists to explore WA in new and exciting ways.

Tourist markets

Holiday and leisure tourists represent a major travel market for WA. This segment includes travellers visiting on group tours and FITs. FITs comprised nearly half of all Chinese tourist arrivals to Australia in 2017 and contributed 25% of total market spend. They are especially interested in unique, luxurious experiences, of which WA offers many. *Business and corporate travellers* are another valuable market segment. International professionals most often visit WA for conventions/meetings, incentives, conferences, and exhibitions; however, they often incorporate leisure elements into their trips either before or after business obligations have been fulfilled. *Education and student travellers* constitute an additional focal group. Chinese students enrolled in WA universities and schools further drive area visitation due to associated VFR trips (i.e., when their parents or friends visit).

Administration and marketing

Tourism WA is the main player in promoting tourism throughout the state. The organisation connects and communicates with relevant shareholders to highlight WA as an enticing destination. In addition to collaborating with government and industry, Tourism WA is in charge of the state's destination marketing and facilitates (but does not necessarily execute) tourism-related investment and infrastructure. Marketing efforts include sponsoring domestic and international events to draw visitors to the region.

The State Government Strategy for Tourism in Western Australia 2020 identified seven "strategic pillars" to grow WA's tourism industry: brand, events, business travel, Asia, regional travel, indigenous tourism, and infrastructure. WA's "Experience Extraordinary" slogan was instituted for marketing purposes and should continue to be applied throughout regional industries. By upholding the "extraordinary" promise, previous and potential visitors may be inspired to come to the state. Strategies such as hallmark events could solicit visitation. Business travellers will likely be the first to encounter the "Experience Extraordinary" brand. Thus, WA plans to promote leisure travel to these visitors in hopes they will perceive WA as a holiday destination rather than one simply meant for business. Perth can be promoted as an educational destination for international students, including those from Asia. Asian tourists may also be compelled to visit WA to partake in luxury experiences. Regional tourism options, such as self-drive tours and camping / caravan experiences, can be promoted as unique leisure opportunities. Aboriginal tourism experiences offer another way for WA to set itself apart from its competitors and exemplify the "extraordinary."



4.3 Other Australian states' experiences with the Chinese market

On a national level, Tourism Research Australia (TRA) has deployed several strategies to promote Chinese tourism throughout the country. For instance, the organisation has established long-term agreements with Air China, China Eastern Airlines, and China Southern Airlines to promote Australia as a global destination for business and leisure. TRA also continues to raise awareness of Australia's business events, product offerings, and delivery through various means (e.g., brand and content marketing, educational visits, distribution development, and engagement events). These settings offer opportunities for members of the Australian business industry to meet qualified buyers, both from China and elsewhere, to expand their business. Certain states have also undertaken China-specific efforts to appeal to existing and potential visitors, as outlined below.

New South Wales.

New South Wales has prioritised several travel segments to promote its tourism industry. Examples include group tourists, FITs, students (and their friends and family by extension), and business travellers. Chinese travellers can engage in an array of activities in this region, including cultural heritage tourism, food tourism, Aboriginal tourism, backpacking, and more. Officials in this region are intent on making the tourism experience more satisfying for Chinese visitors. For instance, providing more Mandarin-speaking guides and staff may help to alleviate the language barrier.



Victoria.

Victoria has sought to expand its China reach through a number of initiatives. The state's China Tourism Strategy, published in 2012, identified ways to target holiday tourists, students, business travellers, and VFR arrivals. The state intended to refine its brand positioning for China and leveraged its business, education, and migrant opportunities to connect with the Chinese market. Access and transportation represented other key priorities; the visa application process was to be simplified, and more direct China–Australia flight routes were planned. More Chinese-language services, including promotional websites, were set to be developed to better inform the Chinese about Victoria.



Queensland.

At the end of 2017, Queensland was Chinese tourists' most considered state for visitation and their third most visited. Tourism and Events Queensland (TEQ) has taken a proactive approach to preparing for and attracting Chinese tourists. Queensland's focus on becoming "China ready" is pronounced: the state's tourism website provides several factsheets for tourism operators to better understand and satisfy Chinese consumers. TEQ is also wielding the power of online payment platforms to promote the state to Chinese visitors. Current campaigns involve partnerships with Alipay, Unionpay, and Ctrip. Many tourism operators in this region have also begun to leverage WeChat, a popular Chinese social media site, as a payment platform.



South Australia.

A relatively small proportion of Chinese tourists visit South Australia for holiday purposes. Young Chinese tourists are common visitors to this area, and the city of Adelaide is the most common stopover. Tourism officials in the region are interested in drawing more holiday tourists to boost the tourism industry. VFR trips are common and tend to be relatively long stays. Business traveller arrivals to South Australia are somewhat low, although business travellers from China tend to integrate leisure into their work trips. For example, they often visit the beach, casinos, and shopping centres when not engaged in business-related activities. This market segment therefore shows promise in terms of helping to support South Australia's tourism industry. Education-focused visits to South Australia are much longer than other types of trips. Education tourists from China are therefore responsible for a considerable proportion of tourism-related expenditure in this region.

South Australia's current target market consists of upper-middle-class couples between 35 and 54 years old who have previously visited Australia and are travelling either independently or as part of customised small-group package tours. Several aspects of South Australia appeal to Chinese visitors and should be emphasised to increase visitation. These include wine, fresh food (particularly seafood), and "naturalness"; Chinese tourists are attracted to South Australia's clear blue skies, large outdoor gardens and parks, and high-quality produce.



Tasmania.

Over half of Chinese visitors to Tasmania came for holiday as of the end of June 2015. An additional 20% were VFR tourists, and 13% visited for education purposes. Most visitors are older than 50; the next-largest market consists of tourists aged 25–29. Many travellers enjoy purchasing locally made souvenirs to bring home to family and friends; thus, the local Salamanca market is frequently visited. Many tourists in Tasmania stay in Hobart and Launceston. Outdoor attractions such as Mt Wellington and Cataract Gorge are particularly popular, as are historical sites such as the Port Arthur Historic Site. The Tasmanian government has launched initiatives to encourage China–Tasmania travel. Efforts include code-sharing between Australian and Chinese airlines to facilitate flight bookings. A travel service in Fujian, China has also agreed to invest in Tasmania's wine tourism industry.



4.4 Current tourism operations toward the Chinese market in WA

The tourism market is currently one of Australia's top revenue sources. Yet Chinese visitation to WA lags behind other states, as mentioned. The WA government is simultaneously searching for new ways to invigorate the state economy. Given these circumstances, tourism operators are targeting the Chinese market for many reasons.

Several operators recognise the potential of the Chinese market to boost WA's tourism industry. The number of Chinese travellers interested in going overseas is increasing. Some of the agency representatives interviewed for this report mentioned having Mandarin-speaking staff in their company and being highly familiar with Chinese culture themselves; therefore, these agencies felt well prepared to arrange successful itineraries for Chinese visitors. Many representatives noted that they regularly attend tradeshows and conferences in Australia and China to promote Australia as a destination and network with industry partners. Tourism operators in WA who choose to focus on the Chinese travel market could benefit from capitalising on these tourists' interests. As noted, the Chinese appreciate Australia's safety, cleanliness, food and wine scene, and air quality. Chinese students comprise a large part of the potential market to WA. Leisure travellers represent another promising segment; many Chinese are interested in travelling abroad on holiday. Geography can likely work in WA's favour in terms of reaching Chinese travellers: given these tourists' interest in Western culture, Australia is fortunate in that it is the closest Western country to China. WA is also the nearest state to China.

Two major tourism products are currently being offered in WA. The first, customised tour packages, are popular especially among independent travellers. These tours generally last anywhere from a week to 10 days. They can be easily personalised to provide an itinerary that suits a tourist's wants and needs, and trips can be tailored to fit a tourist's budget. Even the smallest details, such as meals, can be fully customised based on the traveller's tastes. The second product, pre-determined tour packages, is more structured. These tours can be as short as one day to as long as 14 days. The itineraries for these tours are created in advance and may include a range of services, such as round-trip flights and various tours (e.g., all-inclusive excursions or scheduled sightseeing).

A photograph of two women on a beach, kneeling on the sand and throwing their hands up, scattering sand into the air. The background is a clear blue sky. The quote "WA is also the nearest state to China..." is overlaid on the image in white, italicized text.

“WA is also the nearest state to China...”

Shell Beach, Francois Peron National Park WA
- Picture provided by LH Global Tours

Pink Lake is becoming a popular attraction among Chinese visitors to WA

Arranged tours are location-specific. For example, all operators profiled for this report who are targeting Chinese markets provide tours to the Pink Lake region. This area is WA's major attraction for visitors from China. The Margaret River area is another popular draw. These itineraries also enable travellers to engage in unique activities. Interviewees mentioned several: the Rainbow Containers in Cannington, taking selfies with quokkas on Rottnest Island, scenic flights over Pink Lake, sandboarding in Lancelin, a lobster lunch at Cervantes, a lighthouse visit in Margaret River (Figure 5), snorkelling and a guided nature walk on Abrohlos Island, and dolphin feeding at Monkey Mia.



Hutt Lagoon ("Pink Lake"), Port Gregory WA - Picture provided by LH Global Tours and Auwe Travel

“The language barrier is a widely acknowledged obstacle for Chinese tourists visiting Australia.”

Figure 5 – Blue Haven Beach (Photo taken by LH Global Tours)





All these experiences, and WA tours in general, often include tour guides.

Guides are provided to help ensure that Chinese tourists have positive experiences when visiting WA.

The language barrier is a widely acknowledged obstacle for Chinese tourists visiting Australia.

Multilingual tour guides or voice-over services in Mandarin can help Chinese tourists make the most of their time here.

Chinese travellers' spending habits should be advantageous for Australia as long as these tourists are satisfied.

Among target markets for WA, the Chinese tend to be generous spenders: they know what they are looking for when travelling abroad and are willing to spend money on quality products and services.

Several challenges continue to hinder WA's pursuits of China as a tourist market. The region has been relatively slow in seeking to capitalise on the Chinese market compared to other Australian states. Inadequate infrastructure is one obstacle. A lack of accommodations is a major problem for parts of WA, and the tourism industry is losing business as a result. For instance, Kalbarri's unique scenery is appealing to the Chinese, but the accommodations do not meet their standards. Accommodation options tend to be self-contained rather than hotel-style. They are also located in remote areas with limited amenities, which are unappealing to Chinese tourists. Accommodations without Mandarin-speaking staff can further deter visitation. More Airbnb options or standard hotels could help attract visitors.

Unfortunately, building infrastructure in WA will take time. A major concern among tourism operators in the area is that by the time the necessary infrastructure has been developed, it will be too late. Presently popular areas, such as Kalbarri and Pink Lake, may no longer appeal to tourists once the tourism infrastructure is up to par.

Travel logistics present another problem. Several tourism operators stated there are too few flights available to bring Chinese tourists to WA. Only two airlines offer direct flights between China and Perth. Flight schedules between WA and eastern parts of the country also vary drastically: there are only 10 flights per week to WA compared to more than 90 flights per week in the East. Even when Chinese tourists do come to WA, the size and scale of the region can complicate travel. WA is large, and Chinese tourists tend to visit for only a few days. A 2- to 3-day trip offers too little time for tourists to explore what WA has to offer. Also, any travel beyond Kalbarri requires a flight, which is not always feasible during short trips. To combat these problems, it may be useful to develop rest stops throughout WA. These locations could also include attractions to let tourists become more familiar with the area. This could help to address the issue of Chinese tourists simply not knowing much about the WA as a region. Area landmarks, such as Pinnacles, Bell Tower, and Margaret River, are not readily recognisable to Chinese tourists and are not much different from sites in more popular regions.

Unstable government relations with China have the potential to further complicate Chinese visitation. For example, Chinese officials may be discouraged for their business trips to Australia, and so do the academics attending conferences in Australia in the publicly funded government travel approval system at times of unpleasant relationships between the two countries. It is therefore imperative that the Australian government strive to maintain amicable cooperation with China to help protect its tourism and hospitality industry as well as any tourism operators targeting the Chinese market.

4.5 WA's challenges and problems

Challenge 1: Low market awareness

Only if a destination falls within a potential tourist's awareness set can the destination begin attracting tourist visitation. In WA's case, a major challenge in drawing Chinese visitors is that most outbound tourists from China may not consider WA or Perth as potential tourist destinations. The cities of Sydney, Melbourne, and Brisbane and the Gold Coast are more familiar to most Chinese nationals than Perth. The Sydney Harbour, Opera House, and Great Barrier Reef are iconic Australian tourist attractions to the Chinese, but none of these are within the vast area of WA. Tied to this issue is WA's lack of well-recognised tourist attractions as tourism "signatures." Pink Lake and Rottnest Island (home of the quokka) have potential, but they do not yet possess the market power as "iconic" attractions like the Great Barrier Reef for the time being.



City of Perth - Picture provided by LH Global Tours

Challenge 2: Geographic distribution of tourist attractions

Most of the established infrastructure and tourist attractions in WA are distributed along the Indian Ocean coastal line, either to the north or south of the state's capital city of Perth. This geographic distribution of tourist attractions makes it difficult to arrange a circular itinerary in which visitors do not need to go backwards and can always see something new throughout their travels. In the context of WA tourism, most itineraries starting from Perth, whether northbound or southbound, must come back to Perth to close. This arrangement leads to repetition and boredom for tourists, who may perceive such tours as offering less experiential and monetary value. In this regard, the sheer size of WA and the distance between tourist attractions in an itinerary also mean that visitors are constantly on the move between stops/attractions. A 1- to 2-hour drive – or even a 3- to 4-hour drive – is common when visitors are moving from one spot to another in WA. Visitors may get the impression they are spending most of their time on a tour bus, and if they are time-poor (most people today are!), they may perceive a WA tour as more time-consuming and therefore more expensive.

Challenge 3: Lack of telecommunication infrastructure in WA regions

While WA's tourist attractions spread from metropolitan Perth and the Peel region, its telecommunication infrastructure fails to meet tourists' needs in outer regions. Tourists may have no cellular signal in many places, and Wi-Fi coverage may be unavailable in motel or hotel rooms. Chinese tourists find this lack of connectivity frustrating, as it does not affect domestic travel in China. Additionally, WA's lack of telecommunication infrastructure can exacerbate visitors' safety risks and related concerns.

Challenge 4: Lack of Chinese market knowledge and skills among service staff

While the above mentioned challenges are structural and potentially difficult to address in the short term, this problem pertains more to soft skills in the tourism workforce. Chinese visitors currently represent an emerging, culturally distinct tourist market. We still see the need for service staff in the industry to arm themselves with culturally sensitive knowledge and skills in dealing with these tourists. Our field trip observations revealed that some accommodation service staff must develop cross-cultural understanding and communication skills when serving Chinese visitors.

Challenge 5: Lack of a world-class hospitality service standard

Hospitality services involve hardware facilities as well as service staff's mentality, attitudes, and soft skills. While it is hard to define a world-class service standard, a seasoned traveller can refer to previous travel experiences to identify shortfalls in hospitality service. We observed that service staff's service attitudes and overall service quality can be improved throughout WA's tourism industry. It is especially recommended that hospitality staff focus on expediting service delivery and becoming more responsive to customers' needs. If WA wishes to attract more international visitors and become an international tourist destination, a world-class hospitality service system will surely be critical to its future success.

Recommendations

5.1 A thematic tour-guiding and interpretation system on WA's flora, fauna, history and heritage

We call for relevant government agencies and the industry to collaborate to establish a thematic tour-guiding and interpretation system on WA's flora (Figure 6), fauna, unique landscapes (Figure 7), history and heritage (Figure 8). WA's vegetation differs from that in China; many plants in WA cannot be easily found in China. Similarly, WA's unique animals may be highly appealing to Chinese visitors. Stories around the early settler life and history, heritage sites, and aboriginal culture, will also be attractive to Chinese visitors. WA-based tour guides who provide guiding and interpretation services to Chinese visitors can be trained to follow thematic interpretation principles (Ham, 1992; Ham and Weiler, 2004) to make their interactions with visitors "enjoyable, relevant, organised, and thematic" (Ham and Weiler, 2004, p. 4.).



Figure 6.



Figure 7.



Figure 6. Trees that cannot be commonly seen in China will be attractive to Chinese visitors (Photo taken by Sam Huang)

Figure 7. Unique landscapes like the Pinnacles in WA attract Chinese visitors (Photo taken by Sam Huang)

"...stories in Chinese can be compiled around Aboriginal culture..."





Notably, given that Australia does not have a tour guide certification system, services provided by WA-based tour guides can be expected to vary by tour guides' knowledge base, experience, and skills. Chinese tourists' guided experiences in WA will vary accordingly and may not always be satisfactory.

To promote consistency, we propose the establishment of a tour guide training programme in collaboration with industry for the Chinese tourist market. A WA Chinese-speaking tour guide association, or an association of tour operators targeting the Chinese visitor market, should be developed to support such a training programme. Thematic interpretation techniques should comprise the main training content along with relevant knowledge of WA history, heritage sites, lifestyle, culture, economy, and flora and fauna.

WA flora knowledge may be especially relevant for group-tour driving guides to engage more effectively with Chinese visitors. With sufficient knowledge of WA plants and thematic interpretation skills, driving guides can ensure Chinese visitors remain interested and entertained when learning about WA flora and the stories behind WA's plants. Along the roads in most tour itineraries targeting Chinese visitors, and especially roads in WA's national parks, roadside plantation offers rare views and sightseeing opportunities. Driving guides should leverage this unique landscape by using interpretation strategies to keep tourists entertained. This industry-wide strategy can also counteract the challenges of long-distance driving during Chinese group tours and relieve tourists' boredom or exhaustion.

At the same time, stories in Chinese can be compiled around WA's colonial history, architecture, early settlers' life and their encounters with the indigenous people, and the aboriginal cultures in the state. When presenting to the Chinese tourists audience, tour guides are especially advised to make the stories relevant to modern Chinese life to increase the power of appeal.

5.2 Monitoring the diversification of the Chinese tourist market and targeting niche markets

The Chinese outbound travel market is becoming more diversified. Many new niche markets are developing, and the conventional package tour mass market has gradually faded as the major form of Chinese outbound tourism. A comprehensive list of these emerging niche markets is beyond the scope of this report, but in terms of WA tourism, target-market strategies may differ from those in eastern Australian states. As more FITs are travelling outside China, WA should develop strategies to target these visitors. Current market practices are geared towards Chinese tour groups containing 2–5 members. Although different tour operators may employ distinctive marketing strategies, they are advised to pay special attention to the inter- and intra-state Chinese student market and the senior long-term stay market. The latter is growing. These visitors, we call them “Chinese grey nomads” here in this report, are likely to be in their early to late 60s, retired, empty-nesters, and time- and money-rich. These travellers may also boost Australia’s economy beyond the tourism industry; the real estate and healthcare sectors can likely benefit from their resources in the future.

WA’s world-class food and wine experiences are getting extremely popular among Chinese visitors
- Picture provided by LH Global Tours

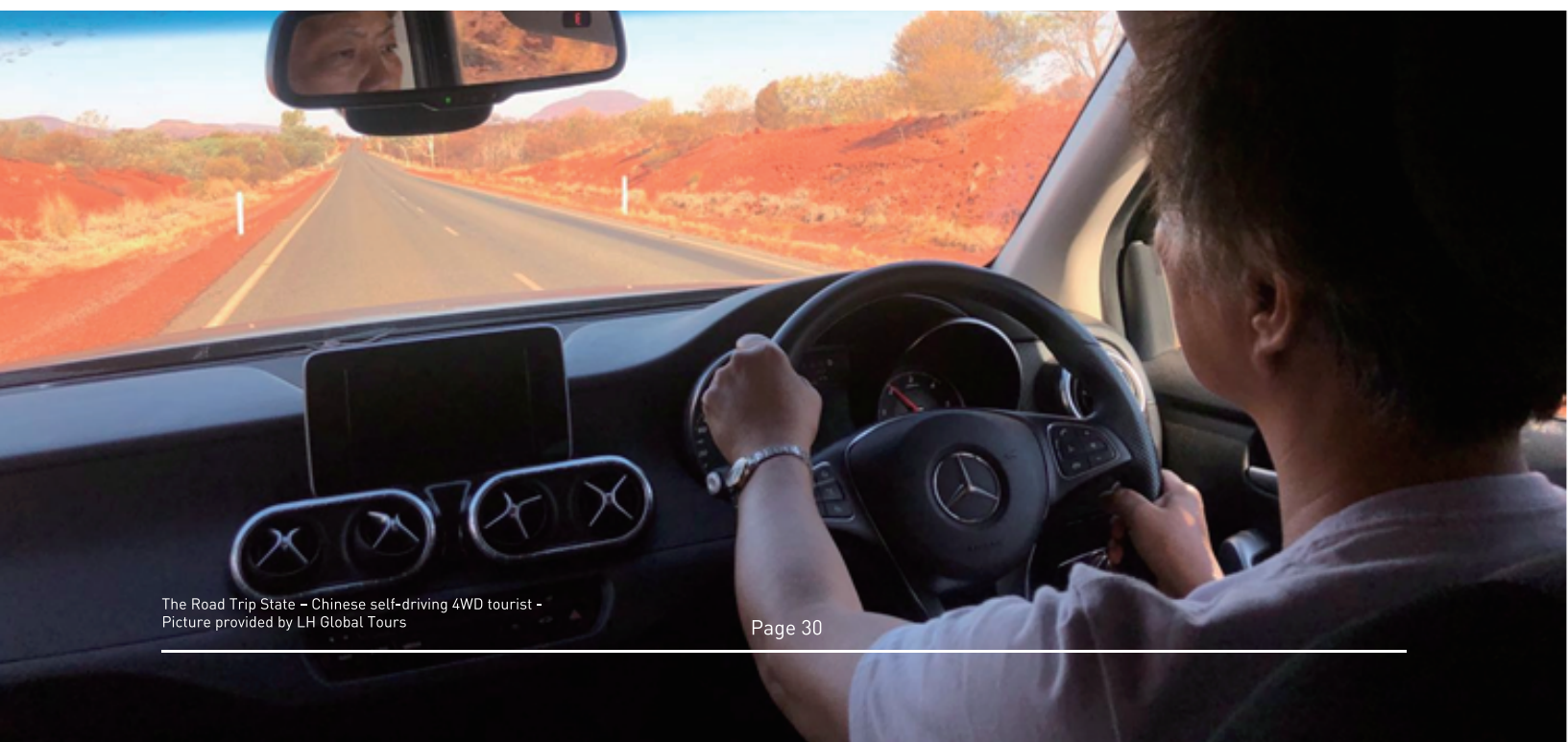


5.3 Focusing on the self-driving Chinese tourist market

As Chinese outbound travellers become more experienced, they prefer more freedom and self-control while travelling. Self-driving tourism is thus expected to become a preferred travel mode for Chinese tourists visiting WA. The self-driving trend may even be corroborated after the COVID-19 pandemic. A pertinent consideration in self-driving tourism is safety. Government agencies and industry peak bodies (including consulate offices) should strive to offer a safe self-driving environment for Chinese tourists in WA. Car rental companies in WA could form strategic alliances with online Chinese travel agencies such as Ctrip and e-Long to provide driver safety record checks and cross-border self-driving certification programmes. A self-driving safety booklet in Mandarin can be developed and provided in Australian airports' international arrival terminals. Such a booklet can also incorporate other safety tips, such as where to purchase gear to fend off Australian bush flies, how to prevent sunburn and dehydration, road safety rules, and emergency procedures. Promoting self-driving tourism may reduce group tour operators' market share, but it will benefit other tourism-related sectors such as hotels, car hires and rentals, and sharing accommodations.

5.4 Applying business innovations and localising the value chain for Chinese tourists

The tourism industry has seen a growing number of innovative business models. China has become one of the world's business innovation centres, and many technology-driven innovations have emerged in tourism-related sectors. Australia's service industries, including the tourism sector, must realise that if they are not active leaders in innovation, they will only be passive followers and their likelihood of benefiting from the tourism boom could be sliced thin. For example, while cheap Australian prepaid mobile phone SIM plans are available to foreign visitors in Australia, Chinese technology operators like Huawei now offer Chinese mobile phone users competitive data plans when travelling outside China. On some mobile apps, tourists can choose a phone plan in as little as a few clicks. Innovative Chinese payment methods like WeChat Pay and Alipay have also greatly facilitated Chinese visitors' shopping and payment when travelling overseas. WA tourism businesses should embrace these payment methods in their operations.



Conclusions

This report is the product of a collaborative project between academic researchers from ECU and industry practitioners from LH Global. At a time when academic tourism research and industry practices appear divided, we advocate for academia–industry research collaboration in the tourism field.

As WA seems to be lagging behind in benefiting from China’s tourism boom, we performed this scoping study to survey WA’s tourism resources, product provisions, and current market situation towards the Chinese tourist market. Relevant academic literature on Chinese tourism to Australia was analysed to provide a fine-grained understanding of Chinese tourists visiting Australia in terms of their travel motivations, tourist types, product preferences, and satisfaction with Australian tourism provisions. Desk research was also conducted to investigate other Australian states’ tourism development strategies and experiences with the Chinese tourist market. WA’s tourism regions, tourism resources, and existing tourism products offered to Chinese tourists were surveyed through archival analysis and in-depth interviews.

This research project may be the first to assess WA’s tourism development in this way. In addition to providing background knowledge, we have clarified the challenges facing WA’s tourism industry in terms of developing the Chinese tourist market. Based on an analysis of worldwide tourism development trends, professional knowledge of the Chinese tourist market, China’s societal driving forces for outbound tourism, and WA’s tourism provisions, this project revealed four recommendations for the industry and relevant government bodies to consider as WA seeks to attract the Chinese tourist market.

It should be noted that this research was completed before the novel coronavirus epidemic (COVID-19); therefore, the impact of COVID-19 on WA tourism was not considered when drafting this report. WA could potentially capitalise on its natural and ecological resources in tourism provisions (e.g., beaches, national parks, wetlands, and lakes) to attract Chinese tourists in the post-COVID-19 era. Specifically, the region could promote itself as a relaxing and rejuvenating haven to recover from this stressful time.

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A full-page background image showing a sunset over a large body of water. The sky is filled with scattered, golden clouds, and the sun is low on the horizon, creating a warm, orange glow. In the distance, a small boat is visible on the water, and a dark silhouette of land is on the horizon.

"Nature-based experiences are pivotal to Chinese tourists' trip satisfaction."



