In 2018, China was Australia's largest inbound market in terms of visitor arrivals and total visitor spend, making it one of Tourism Australia's most important source markets. Both arrivals and spend saw steady growth of 6% and 13% year-on-year respectively.

**MARKET OVERVIEW**

**VISITATION AND SPEND**
- 1,432,100 Arrivals at YE Dec 2018
- 33% First time visitors
- 189 Flights per week
- $11.7bn Visitor spend at YE Dec 2018
- $8,900 Average spend per trip
- 44 Average nights stayed

**MARKET OPPORTUNITY**
- 20.4m Estimated number of High Value Travellers (HVTs)**
- Representing ~41% of the total out of region travel market

**MOTIVATIONS FOR TRAVEL**

**DRIVERS OF DESTINATION CHOICE**
- #1 Nature & wildlife
- #2 Safety & security
- #3 Food & wine
- #4 Aquatic & coastal
- #5 Romantic

**AUSTRALIA'S PERFORMANCE**

- **NATURE & WILDLIFE**
  - *Australia (#1)* 46%
  - *France* 43%
  - *Hawaii* 38%
  - *Italy* 34%
  - *USA* 31%

- **AQUATIC & COASTAL**
  - *Hawaii* 54%
  - *Australia (#2)* 49%
  - *Maldives* 41%
  - *Indonesia* 26%
  - *New Zealand* 23%

- **FOOD & WINE**
  - *France* 49%
  - *Italy* 34%
  - *Australia (#3)* 24%
  - *Thailand* 24%
  - *Germany* 21%

**DEMAND FOR AUSTRALIA**

**DESIRABILITY**
- *Australia (#1)* 13%
- *Hawaii* 10%
- *Maldives* 9%
- *France* 9%
- *USA* 5%

**FASHIONABILITY**
- *France* 30%
- *USA* 28%
- *Australia (#3)* 22%
- *Italy* 13%
- *UK* 12%

**CONSIDERATION**
- *France* 40%
- *Australia (#2)* 37%
- *Hawaii* 29%
- *USA* 28%
- *Italy* 26%

**INTENTION**
- *Australia (#1)* 25%
- *France* 25%
- *Hawaii* 17%
- *Germany* 16%
- *UK* 15%

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**
- **PLAN**
  - 51% plan their trips
  - 1-2 months prior
- **BOOK**
  - 49% book their trips
  - 1-2 months in advance
- **TRAVEL**
  - Peak travel season
  - Jan-Feb

**BOOKING SOURCES**
- **ONLINE VS OFFLINE**
  - 76% use one or more online booking sources
  - 48% use one or more offline booking sources
- **DIRECT VS INDIRECT**
  - 49% use one or more direct booking sources
  - 79% use one or more indirect booking sources

MARKET OVERVIEW

In 2018, China was Australia’s largest inbound market for international visitor arrivals (up 6%) and total visitor expenditure (up 13%), making China one of Tourism Australia’s most important source markets. China has the largest volume of estimated High Value Travellers (HVTs), representing approximately 47% of China’s out of region travel market.

CURRENT MARKET

- 1.4m Total arrivals at YE Dec 2018
- ~1 in 3 of these visitors are HVTs
- 2-3x more spend than average travellers

MARKET OPPORTUNITY

- 20.4m High Value Travellers in China
- 10.8m considering Australia in the next four years
- 9.6m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

- **NATURE & WILDLIFE**
  - Australia (1): 72%
  - France: 56%
- **AQUATIC & COASTAL**
  - Australia (1): 72%
  - Hawaii: 54%
- **FOOD & WINE**
  - Australia (2): 46%
  - New Zealand: 46%
- **Drivers of Destination Choice**
  - #1 Nature & wildlife
  - #2 Aquatic & coastal
  - #3 Food & wine
  - #4 Safety & security
  - #5 Romantic

TRAVEL ATTRIBUTES

- **Authenticity**
  - 97%
  - Seek authentic experiences through the local culture and getting a taste of everyday life.
- **Open-Minded**
  - 97%
  - Travel to become more openminded and knowledgeable about the world they live in.
- **Purposeful**
  - 94%
  - Look for purposeful travel where it allows them to give back to the destination they visit.
- **Fashionability**
  - 94%
  - Seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

- **Lead Time**
  - **Plan**: 60% plan their trips 1-2 months prior
  - **Book**: 60% book their trips 1-2 months in advance
  - **Travel**: Peak travel season Jan-Feb
- **Booking Sources**
  - **Online vs Offline**: 85% use one or more online booking sources
  - 39% use one or more offline booking sources
  - **Direct vs Indirect**: 54% use one or more direct booking sources
  - 79% use one or more indirect booking sources