

The Chinese Traveller

Segmentation of the Chinese market



Tourism Australia

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Background

Tourism Australia recognised the need for a ground up review of our understanding of the Chinese traveller in 2005. The main feature of this review was a major segmentation study of the outbound traveller market.

One of our key findings was rigidly defined socio-demographic segmentation is much less relevant in China than it used to be. Much like all other inbound markets, segmentation based on attitudes to life in general and tourism specifically, is considered more informative and therefore valuable for marketing purposes.

This fact sheet provides an in-depth profile of the different attitudinal segments we found and is one of a series of documents created to increase your understanding of long haul travellers in China (for more information on the document suite, see the end of this document).

This fact sheet gives a detailed overview of the segments in this market and practical information profiling each group including:

- Demographic profiling of each segment
- Approach to long haul travel
- Perception of Australia
- What inspires them
- How to reach them in the media

- Timeline for planning their holidays and the sources they use when planning
- Travel profile
- Holiday activities of interest
- Long haul destinations that come into consideration

Not all the segments identified will be actively targeted by Tourism Australia's global marketing activities. Tourism Australia's global brand campaign is targeting a global communication segment called the Experience Seeker. Communications designed to appeal to the Experience Seeker will also motivate many of the segments identified in China (for more information refer to the Experience Seeker fact sheets).

The information contained in this fact sheet provides important insight into the product/activity needs of specific segments including:

- Creating a strong and effective offer
- Crafting marketing messages for greatest effect
- Identifying segment specific marketing opportunities
- Optimising the effectiveness of communications plans
- Getting inspiration for new product ideas



Segmentation helps us to:

1. Maximise the return on investment of our marketing activity

Segmentation helps us to identify segments in the Chinese market where the return on investment for our marketing dollar will be greatest. By profiling the market segments, we can identify which segments will be most receptive to what Australia has to offer, which will provide the greatest yield, and which are most likely to disperse. Our marketing activity can then be directed at those segments, rather than at the market as a whole and we can better direct our marketing funds by more efficient targeting.

2. Understand the composition of the market better

By segmenting the market we can understand the composition, or groups that exist in the Chinese travel market better. We begin to appreciate why travellers visit Australia and why they don't. We identify which travellers are most likely to come here, and which travellers won't. We learn how they plan and book their holidays, where they get information, what they like to do on holiday and much more. All this information helps us to develop more effective marketing campaigns and more attractive tourism products.

3. Communicate more effectively to our target segments

Psychographically based segmentation is based upon the emotional and rational motivations that drive people's travel choices. It also provides us with insight into where the segments look for travel information and what media channels they pay most attention to. This information enables us to develop marketing communications campaigns that are specifically designed to reach our target segments and to communicate messages that they find powerful and motivating.

What segments are there in the Chinese market?

There are many ways to segment a market: by life-stage, attitudes, needs, behaviours or just about any other consumer characteristic you can imagine. The best segmentations have these aspects in common:

- The segments are easy to identify and access in the marketplace;
- They are sufficiently large, valuable and distinct to justify a dedicated marketing strategy;
- The segments are sustainable over time

In this case, the segments were determined using two criteria; the horizontal axis indicating the level of experience and interest in long haul travel and the vertical axis indicating the respondent's preference towards challenging themselves when travelling. These two criteria were chosen as they were seen as core attributes of those likely to visit Australia.

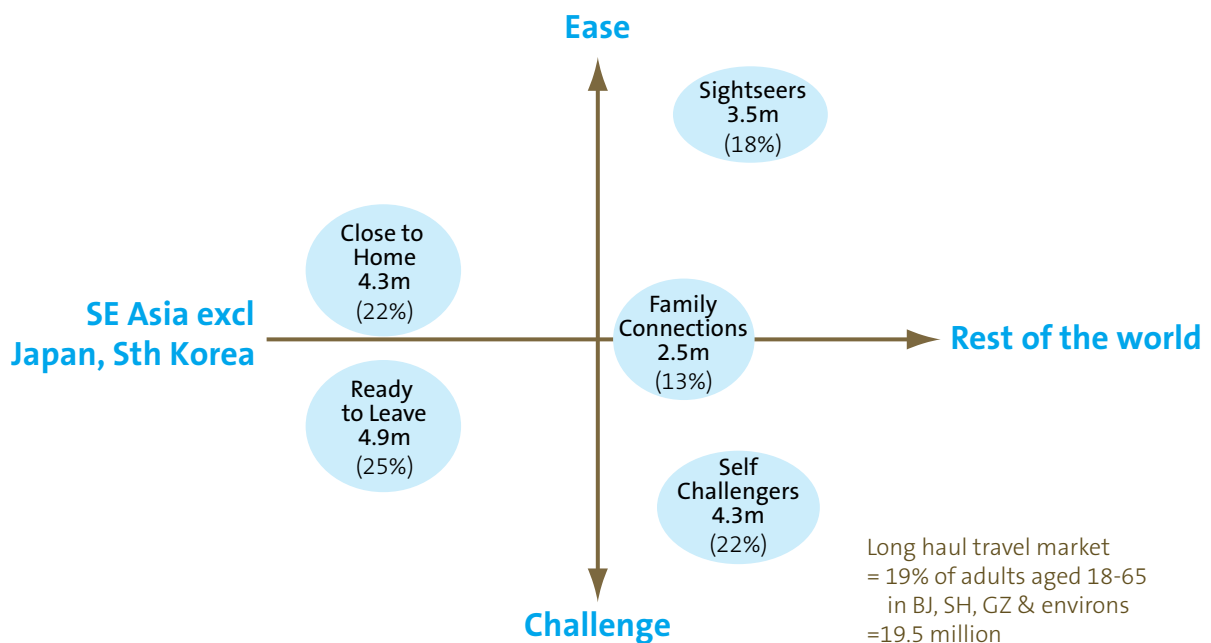
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

In segmenting the Chinese travel market we looked to develop a segmentation model that could provide the foundation for a full range of marketing programs and strategies including brand communications, media planning, promotions, public relations, product development and our international media programs.

Taking these factors into account, we identified five distinct segments in the Chinese long haul travel market:

- Self-Challengers
- Family Connections
- Sightseers
- Ready to Leave
- Close to Home

These segments are distinguished by their travel experience on the one hand, and their attitudes to travel and the style of travel experience they seek on the other. Almost every long haul traveller in China can be allocated to one of the five segments we've identified. Together, the five segments account for more than 19.5 million people.



Over the next few pages, we'd like to introduce you to the five segments and share with you the key characteristics that set each segment apart from the rest of the long haul market in China.

Self-Challengers

“Don’t always think you are the outsider - try to go into their lives.” Male, 27, Guangzhou

Segment highlights

Segment size	4.3 million long haul travellers / 22% of the long haul market
Heart of the segment	An inner drive to immerse themselves in other cultures through travel and learn about themselves and the world
Profile	<p>Compared to other long haul travellers in China, Self-Challengers:</p> <ul style="list-style-type: none">• Are mostly married, however those who are single are more likely to be living alone• Are the most likely to be University educated• Those who are single have the highest personal income• Are the most likely to work for an international company, and are the least likely to work for a state enterprise or local company• Are more likely to own a car, digital camera/video camera• Are more likely to have an internationally recognised credit card• Have the highest competency in the English language• Have a range of interests which are more likely to include fitness, dancing, going to bars and coffee shops, racquet sports and making home movies• Are more likely to be between 25 and 34 years of age
Approach to long haul travel	<p>Self-Challengers live to travel. They like to get ‘under the skin’ of a destination and experience the true culture and people away from the tourist trail.</p> <p>Their confidence as travellers and desire to seek memorable experiences drive their interest in travelling independently, without the assistance of a guide.</p> <p>Not restricted by financial barriers, their drive for understanding worlds different to their own leads them to consider a wider range of destinations and accounts for a particular interest in western destinations. Visiting friends and family is not a strong influence in their choice of destination.</p>
Australia as a destination	<p>Australia is viewed very favourably by Self-Challengers. There is moderate enthusiasm for Australia, although for those ‘in the know’ the response is stronger.</p> <p>Self-Challengers are more likely to disagree with rational barriers such as distance and the expense involved with travelling to Australia. Australia’s famous sites, natural phenomena and famous beaches are also key drivers among this segment.</p> <p>Those who have visited Australia are more likely to return to Australia than among other segments of the Chinese market.</p>
What inspires them?	<p>When deciding where to go on their next holiday, Self-Challengers are more likely than other long haul travellers to be inspired by:</p> <ul style="list-style-type: none">• Travel books• Business connections• Reading/hearing about explorers <p>Self-Challengers are also inspired by friends and family who have visited the destination.</p>

“I want to go to their market and see what they use daily, what vegetables are there, what food they eat.” Female, 42, Beijing

How do I reach them in the Media?

Self-Challengers media preferences include:

- They are slightly less likely to read the newspaper daily. When reading the newspaper they are the most likely to always read the international, economic and industry news, motor, property and collections sections
- The most popular newspaper publications among Self-Challengers include Guangzhou Daily, Beijing Evening News and Xinmin Evening News. They are less likely to read the Shanghai TV
- Self-Challengers watch the least amount of TV. However, in comparison to other segments they are more interested in international news and sports programmes, National Geographic and the Discovery Channel
- CCTV is the most popular news network. Other popular network include Beijing Satellite, SH TV Great Sports, Jade, GZTV and ATV Chinese
- Interest in magazines is consistent with the overall long haul travel market however; Self-Challengers are more likely to read literature and art magazines
- Interest in the radio is also consistent with the broader long haul travel market. The top radio stations nationally among Self-Challengers include CNR 1, BJ Music Channel, DF Music and CRI
- Self-Challengers spend the most amount of time per day using the internet and are more likely to have internet access in their home. They are more likely use google.com and hotmail.com than other long haul travellers

Planning timeline

Self-Challengers begin the planning process and arrange flights and accommodation at similar points in the process to other long haul travellers:

- Start planning: 16 weeks before departure
- Book flights: 4 weeks before departure
- Book accommodation: 3 weeks before departure

Planning sources

When planning a long haul holiday, Self-Challengers use similar sources to the overall long haul market. Internet travel sites and tour operators are common sources used when planning holidays.

Self-Challengers are more likely to use friends or relatives living at the destination for research on the destination, however are less likely to get pricing information from CNTA.

Travel Profile

On a long haul holiday, Self-Challengers:

- Are more likely to travel alone
- Are less likely to travel in a group of 6 or more people
- Stay in moderate hotels (2/3 stars) or luxury hotels

"I associate Australia with leisure and fashionability." Female, 42, Beijing

"I'd like to live with the locals...experience ordinary Australian life." Female, 32, Guangzhou

Holiday activities

Self-Challengers have a wide range of interests and are more likely than other travellers to plan their holiday around:

- Going to clubs/bars/nightclubs
- Winter sports
- Cycling

When on holiday, they are more likely to:

- Attend live theatre or musical performances
 - Enjoy the nightlife (bars/night clubs)
 - Explore the backstreets
 - Get to know the locals
 - Relax by a pool or at the beach
 - Participate in water sports
-

**Long haul destinations
(other than Australia)
they would really like to
visit / seriously consider
going to**

Other long haul destinations of interest include:

- | | | | |
|------------|---------------|---------------|----------------|
| • France | • Germany | • India | • Africa |
| • USA | • New Zealand | • Switzerland | • The Maldives |
| • Finland | • Sweden | • Turkey | • Ireland |
| • Portugal | • Norway | | |

Family Connections

"I would only take a long holiday if I was invited by a family member. My younger brother lives abroad in Australia and I went for three months and saw all the nice touristy places." Female, 46, Shanghai

Segment highlights

Segment size	2.5 million long haul travellers / 13% of the long haul market
Heart of the segment	Holidays are driven by family connections beyond all others
Profile	<p>Compared to other long haul travellers in China, Family Connections:</p> <ul style="list-style-type: none">• Have a higher than average household income• Are more likely to work for a JV company and less likely to work for the Government• Are more likely to own a car and a digital camera/video camera• Have one of the higher competency levels in English• Have a range of interests that are more likely to include golf• Are more likely to live in Shanghai
Approach to long haul travel	<p>Family Connections are not avid travelers. Without the crutch of family or friends, long haul travel holds little appeal for this group and does not play a major role in their life.</p> <p>While they hold some desire to experience what the destination has to offer, they are not interested in fully immersing themselves in the local culture. They are more interested in the big city, famous brands and celebrity culture of destinations, than exploring the true nature of the destination.</p> <p>Not concerned with seeing the sights, their need for recommendations and advice defines their low level of interest and independence.</p> <p>Notably, while not placing much emphasis on seeking value for money from their holidays, the cost involved in getting to a destination (including their ability to use frequent flyer points) does play a role in determining whether to visit a destination or not.</p>
Australia as a destination	<p>Australia is viewed very favorably by Family Connections however this is generally led by the family/friends connection at the destination.</p> <p>Australia is viewed as good for shopping, not overly expensive and a destination that would affect them in a positive manner. Family Connections who have visited Australia are more likely to visit again than other long haul travelers.</p> <p>In contrast to this, some possible barriers that are more likely to be seen by Family Connections include Australia being too far away and expensive to travel to, being more suited to young people and lacking the heritage of destinations such as Europe.</p>
What inspires them?	<p>Family Connections are more likely than other long haul travelers to get inspiration from colleagues or business contacts at the destination.</p> <p>In contrast to this, they are less likely to be inspired by:</p> <ul style="list-style-type: none">• Friends who have visited the destination• TV documentaries• Travel programmes

"I will try the local food, but just a few meals as we are not so used to that. Then afterwards go back to Chinese." Male, 40, Guangzhou

How do I reach them in the Media?

Family Connections media preferences include:

- Family Connections spend less time per day reading the newspaper. They are less likely to always read the local news, fashion, food, law and technology sections. Some of the more popular newspapers among this segment include the Guangzhou Daily, Beijing Evening News and Xinmin Evening News
- They watch less TV than other segments of the Chinese market and are less likely to watch travel and leisure programmes, regional profiles, interviews, the Discovery Channel and music programmes.
CCTV is among the more popular TV networks in Beijing. In Shanghai, the more popular channels include East Movie Channel, Oriental TV Arts & Ent. and Oriental TV News & Ent. In Guangzhou, the most popular channels include GD Satellite, Jade and GZ TV Movies
- Interest in magazines is consistent with the overall long haul travel market however; Family Connections are less likely to read literature or art magazines.
- Interest in the radio is also consistent with the overall long haul travel market. The top stations in Beijing include BJ Traffic, BJ Music and BJ Art/Literature. The top radio stations in Shanghai include DF Music 101.7, DF Music, 103.7 and DF News 104.5. In Guangzhou the top stations include GD Music, GD Zhuijiang and GD Traffic
- Family Connections spend less time per day using the internet and are less likely to read newspapers online. However, they are more likely to use the internet for shopping for products and services. Popular websites among this segment include sina.com.cn, sohu.com and 163.com. They are less likely than other travellers to access baidu.com
- They go to the cinema slightly more often than the average long haul traveller

Planning timeline

Family Connections begin the planning process and arrange flights and accommodation at similar points during the process to other long haul travellers:

- Start planning: 17 weeks before departure
- Book flights: 4 weeks before departure
- Book accommodation: 3 weeks before departure

Planning sources

When planning their holidays, Family Connections use the internet throughout the process, including booking accommodation and flights. Friends and family living at the destination also assist throughout the planning process. They are more likely than other travellers to get pricing information directly from the airlines (either by internet or phone).

They are less likely to book accommodation as part of a package and more likely to organise only their flight prior to departure.

Travel Profile

On a long haul holiday, Family Connections are more likely to:

"I have some good friends in Australia. It's a stress free, casual country - a big place. I'd like to try the wines." Male, 35, Beijing

- Travel with their children
- Travel with a club or association
- Stay in a range of accommodation including staying with family and friends

They are more likely to take shorter trips than other long haul travellers.

Holiday activities

Family Connections are more likely to visit friends and family when on holiday. Moreover, they are less likely than other travellers to plan their holidays around:

- Sampling the local food and wine
- Shopping at local markets
- Shopping for local products
- Beach walking
- Sunbathing
- Enjoying the natural environment

When on holiday, they are less likely to:

- Shop for local products
- Visit historic sites
- Attend live theatre/musical performances
- Get to know the locals
- Visit local markets
- Sample the cuisine
- See wildlife in their natural environment
- Go on guided tours
- Participate in water sports

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- | | | | |
|------------------|----------------|----------|-----------|
| • France | • Germany | • USA | • Italy |
| • Hungary | • UK | • Canada | • Austria |
| • Czech Republic | • The Maldives | | |

Sightseers

"I will have to see those famous places, the more the better, then I can take pictures and show my friends." Male, 34, Beijing

Segment highlights

Segment size	3.5 million long haul travellers / 18% of the long haul market
Heart of the segment	The guarantee of seeing world famous sights in a comfortable, secure fashion and the public status that this confers
Profile	<p>Compared to other long haul travellers, Sightseers:</p> <ul style="list-style-type: none">• Are more likely to be male and married• Are more likely to be parents• Have a higher personal and household income• Are more likely to own their own house or flat outright as well as a digital camera/video camera• Are more likely to have an internationally recognised credit card• Have a range of interests which are more likely to include going to the theatre• Are more likely to live in Guangzhou• Are less likely to be between 18 and 24 and have the highest average age of all segments (39)
Approach to long haul travel	<p>Sightseers look for holidays where they can enjoy the sites of a destination without forgoing the luxury and amenities they are accustomed to.</p> <p>Not interested in immersing themselves in a destination or getting to know the locals and their culture, Sightseers are interested in visiting destinations that are safe and affirm their position in society. They are constantly looking for endorsement of their choices and the ability to share their experiences with those at home. Seeing the sights (safely) confers bragging rights and gives them public status.</p> <p>Not interested in adventure and more concerned with being looked after and pampered while on holiday, Sightseers lack confidence as travellers and are more interested in group travel as long as this affords them a certain degree of independence.</p>
Australia as a destination	<p>Australia is viewed quite positively by Sightseers, with a high level of willingness to believe Australia is a welcoming destination and somewhere that would interest them. Sightseers are more likely to consider visiting Australia than other segments.</p> <p>Sightseers are more likely to feel that Australia has many "must see" sights and is a comfortable and safe travel destination. There is a feeling that there is a range of travel opportunities in Australia that would appeal to people of all ages.</p> <p>In contrast to this, Sightseers are not as interested in getting to know the locals.</p> <p>Interestingly, Sightseers are more likely to feel Australia is too big for just one holiday, yet those who have visited Australia previously are less likely to visit Australia again.</p>

“The tour can guarantee that I pack in as many things as possible, and they would be there to give explanations, otherwise how can I understand what I have seen?” Male, 55, Guangzhou

What inspires them?

When deciding where to go on their next holiday, Sightseers are more likely to be inspired by:

- Friends who have visited the destination
- Specialist travel magazines
- Magazine or newspaper articles

Other forms of inspiration among Sightseers include brochures and advertisements from tour companies.

How do I reach them in the Media?

Sightseers consume a range of media including:

- They spend more time reading the newspapers each day and are more likely to always read the local and national (Chinese) news sections. The most popular newspapers among Sightseers include the Guangzhou Daily, Xinmin Evening News and Beijing Evening News
 - Sightseers watch an average amount of TV, however they are more likely to watch international and domestic news programmes than other long haul travellers. They are the least likely to watch cartoons or children’s programmes
 - CCTV is the most popular TV network in Beijing. SH TV Young, Oriental TV News & Ent. and CCTV are the most popular channels in Shanghai while the most popular channels in Guangzhou include Jade, GZTV and ATV Chinese
 - Interest in the radio and magazines is consistent with the overall long haul travel market however; Sightseers are less likely to listen to DF Music FM 101.7
 - They use the internet less often than other long haul travellers. They are less likely to use the internet at an internet café or to listen to or download music. They are less likely than other long haul travellers to use google.com or tom.com
-

Planning timeline

Sightseers begin the planning process and arrange flights and accommodation at similar points during the process to other long haul travellers:

- Start planning: 15 weeks before departure
 - Book flights: 4 weeks before departure
 - Book accommodation: 3 weeks before departure
-

Planning sources

Throughout the planning process, Sightseers deal with tour operators to plan their holidays. Local travel agents are also used when it comes to booking accommodation. Sightseers are more likely to source flight availability through tour operators or directly through airlines online than other long haul travellers.

Other sources of planning include internet travel sites when booking accommodation.

Sightseers are more likely to organise flights, accommodation, meals and tours/activities in advance and are less likely to organise only flights or flights and some accommodation. They are also more likely to book accommodation as part of a package.

Travel Profile

On a long haul holiday, Sightseers are more likely to:

- Travel as part of an organised group tour
- Travel with 6 or more people
- Travel for a longer period of time

Moreover, they are less likely to travel alone or stay with their family at the destination.

“I will definitely follow the guide, I don’t know anything there, what if I get lost?!!” Female, 40, Beijing

“In France, definitely buy those miniature Eiffel Towers; and in Holland those wood shoes key chain. That shows I have been there!” Female, 45, Shanghai

Holiday activities

Sightseers have a wide range of interests and are more likely than other travellers to plan their holiday around:

- Shopping for local products
- Visiting local markets
- Shopping for famous local brands
- Photography
- Wildlife experiences
- Going to clubs, bars or nightclubs
- Sailing/harbour cruises
- Visiting family

When on holiday, they are more likely to:

- Visit famous landmarks
- Visit historic sites
- Go on guided tours

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- France
- Germany
- USA
- New Zealand
- Brazil
- Italy
- Holland

Ready to Leave

"I have been to Japan so I think Korea and Japan are more or less the same. Basically all the countries are the same in Asia; they are all black eyes and yellow skin." Female, 27, Shanghai

"Usually we would travel within Asia. But the things outside Asia will be very different." Male, 23, Shanghai

Segment highlights

Segment size	4.9 million long haul travellers / 25% of the long haul market
Heart of the segment	The outside world beyond South East Asia beckons
Profile	<p>Compared to other long haul travellers in China, Ready to Leave:</p> <ul style="list-style-type: none">• Are more likely to be single and less likely to be parents• Have the lowest household and personal income• Are slightly less likely to have a University education• Are less likely to own a car, digital camera or an international credit card• Have a range of interests, however these are less likely to include eating at restaurants or having a meal with their family• Are more likely to be aged between 18 and 24 years of age
Approach to long haul travel	<p>Ready to Leave travellers have a keen interest in travelling. They have a pent up yearning for a truly different experience and hence are keen to travel to destinations outside South East Asia.</p> <p>Interested in immersing themselves in the people and culture of a destination, Ready to Leave are confident travellers who seek adventure to destinations not typically frequented by tourists. They are not driven by the need for comfort and decadent service; they are less likely to go for the easy option, accounting for their preference for avoiding group travel.</p>
Australia as a destination	<p>Although fewer Ready to Leave travellers rate Australia highly, it is higher in the consideration set when compared with other destinations.</p> <p>There is an underlying sentiment of excitement and expectation of a different world in Australia – however what exactly this difference is, is uncertain.</p> <p>Ready to Leave travellers are more likely to view Australia as providing good value for money and an opportunity to truly experience a different lifestyle and a level of interaction with the locals.</p> <p>The lack of heritage when compared with Europe does come into consideration more constantly than among other travellers, however this is the only recurring barrier mentioned among this segment.</p>
What inspires them?	Ready to Leave travellers are inspired by similar factors to other long haul travellers, including internet travel sites and friends who have visited the destination.
How do I reach them in the Media?	<p>Ready to Leave media preferences include:</p> <ul style="list-style-type: none">• They are average newspaper readers, however are less likely to read the leisure and travel sections. Some of the more popular publications include the Guangzhou Daily, Beijing Evening News and Xinmin Evening News

“Not the same continent, not Asian, different...but I’d like to know more - I don’t know what to expect.” Male, 23, Shanghai

“I have a feeling that there are many things to see in Australia - in Europe it is more about shopping and seeing the tall buildings.” Male, 35, Guangzhou

How do I reach them in the Media?
(continued)

- They watch slightly more television than other long haul travellers. They are more likely to watch music programmes including MTV and travel satellite TV stations and are less likely to watch international and domestic news channels. Some of the more popular networks in Beijing include CCTV, Beijing Satellite and Beijing TV2. In Shanghai, SH TV Young, CCTV6 and Oreintal TV are the more popular networks. Jade, GZ TV and GZ Satellite are among the more popular networks in Guangzhou
- Ready to Leave are more likely to read job advertisement magazines, however in general have similar consumption patterns to other Chinese long haul travellers
- Their radio usage is similar to other long haul travellers, however they are more likely to listen to DF Music FM 103.7. Other popular channels nationally include CNR 1 and BJ Music
- They spend an average amount of time per day using the internet for non-work purposes however they are more likely to use the internet at an internet café. They are more likely to use the internet for downloading movies, accessing bulletin boards or blogging. Some of the top websites used include Sina.com.cn, Sohu.com and 163.com

Planning timeline

- Ready to Leave travellers begin the planning process and arrange flights and accommodation at similar points during the process to other long haul travellers:
- Start planning: 21 weeks before departure
 - Book flights: 5 weeks before departure
 - Book accommodation: 3 weeks before departure

Planning sources

- Ready to Leave travellers use a range of sources when planning a holiday. They are more likely to source pricing information through tourist office brochures.
- Moreover, they are more likely to source accommodation information through
- Specialist travel magazines/books
 - Tourist office brochures
 - Magazine/newspaper articles
 - On-line newsletters
- The internet is also a common source during the research phase prior to making their bookings.

Holiday activities

- When planning a holiday, Ready to Leave travellers are more likely to plan their holiday around:
- Camping
 - Diving
 - Snorkelling
 - Walking
 - Hiking

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

- Other long haul destinations of interest include:
- New Zealand
 - Finland
 - USA

Close to Home

“South East Asia is better, it is closer to Chinese way of living, I feel more comfortable there as they are almost the same.” Female, 30, Shanghai

“I am not brave. Nothing too dangerous for me” Male, 35, Guangzhou

Segment highlights

Segment size	4.3 million long haul travellers / 22% of the long haul market
Heart of the segment	Somewhere familiar and welcoming to relax and feel safe
Profile	<p>Compared to other long haul travellers in China, Close to Home:</p> <ul style="list-style-type: none">• Are more likely to be female• Have the lowest personal and household income• Are more likely to count high school as their highest level of education and are less likely to have attended University• Are more likely to be a clerk working in a state, Government or local company• Are more likely to be working in the services industry• Are less likely to own a car, digital camera or international credit card• Are the least likely to be proficient in English• Have a range of popular interests which are more likely to include watching TV, reading, shopping, hiking and bushwalking
Approach to long haul travel	<p>Close to Home are not natural travellers. They prefer travelling in groups with more experienced people as guides and look for high levels of service to alleviate the stress of the unknown. This is symptomatic of travellers with such limited experience.</p> <p>They are keen to visit famous sites and bring back trophies to show others, however do not wish to mix with the local people and culture. They are curious about modern or progressive countries however are more pre-disposed to safe destinations that welcome Chinese people.</p> <p>Less interested in visiting family and friends, they are unlikely to consider destinations outside South East Asia and do not feel the need to visit various locations on the one trip.</p>
Australia as a destination	<p>Close to Home travellers are less likely to want to visit Australia, which is partly driven by the perceived lack of history when compared with destinations such as Europe. It is generally viewed as a remote destination that is not suited to their requirements.</p> <p>Concern is also evident over the cost of Australia once there and the lack of friends and family at the destination.</p>
What inspires them?	<p>When looking for a travel destination, Close to Home tend to be inspired by TV travel programmes, brochures, advertisements and friends who have visited the destination.</p> <p>While these elements inspire Close to Home travellers, these elements are just as effective forms of inspiration among the remainder of the Chinese long haul travel market.</p>

“I would only go once to Australia. It takes a long time to fly there and would have to go on a tour. I don’t know anything about their customs.” Male, 37, Guangzhou

“Australia is trendy for young people. I’m not that adventurous.” Male, 35, Guangzhou

How do I reach them in the Media?

Close to Home media preferences include:

- They spend slightly more time per day reading the newspaper and are more likely to read the fashion and shopping guide sections and less likely to read the international and domestic news sections. Some of the more popular publications include the Guangzhou Daily, Beijing Evening News and the Xinmin Evenings News. In contrast they are less likely to read the Beijing Youth Daily
- They watch slightly more TV than other long haul travellers, even rating it as an interest. They watch a range of genres consistent with the overall travel market
- CCTV and Beijing TV are among the more popular TV networks in Beijing. In Shanghai, SH TV Young, Oriental TV Arts & Ent. and East Movie Channel are among the more popular channels. In Guangzhou, the more popular networks include Jade, GD Satellite and GZ TV
- Interest in radio is consistent with the overall long haul travel market. Some of the more popular channels nationally include BJ Traffic, CNR 1, BJ Music and DF Music
- Magazine consumption is also consistent with the broader long haul travel market. However, Close to Home are more likely to read family/living and film/music magazines and less likely to read news and car magazines
- They spend the least amount of time per day using the internet for non-work purposes. They are more likely to use the internet at an internet café or a friend/relatives home and are more likely to use it to listen to or download music. They are less likely to use the internet for getting email alerts from companies. Some of the top websites include Sina.com.cn, Sohu.com and 163.com

Planning timeline

Close to Home travellers begin the planning process and arrange flights and accommodation at similar points in the process to other long haul travellers:

- Start planning: 20 weeks before departure
- Book flights: 4 weeks before departure
- Book accommodation: 3 weeks before departure

Planning sources

Close to Home travellers are more likely to use tour operators as planning sources throughout the planning process.

When conducting initial research, they are also more likely than other travellers to use travel guides, the radio and TV travel programmes. Checking flight availabilities over the phone is also a source used by this segment.

Holiday activities

Close to Home travellers are more likely to plan their holidays around activities for children and are less likely to plan their trip around nightclubs, bars and clubs.

Other activities of interest include sampling local cuisine, shopping, going to the beach, sunbathing and exploring the local natural environment.

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- USA
- Canada
- Germany
- Switzerland
- France
- Italy



Identifying Australia's most valuable target markets

Of the five segments identified in the Chinese travel market, Self-Challengers and Sightseers are the segments specific to the Chinese market that Tourism Australia has identified as core targets.

These two segments clearly have the greatest potential to generate income for Australian tourism and deliver a good return on our marketing investment. In addition, Self-Challengers and Sightseers have the greatest potential to travel to Australia in the short to medium term.

For all these reasons, Tourism Australia believes Self-Challengers and Sightseers represent the most suitable target segments in the Chinese market to achieve sustainable growth in Australian tourism.

What about other segments?

You may be wondering what this means for the other three segments; Family Connections, Close to Home and Ready to Leave. Members of these segments will still visit Australia and may well be appropriate targets for parts of the Australian tourism industry.

There is the opportunity to bridge current barriers and enhance the drivers exhibited by these segments by

enhancing awareness and educating the Chinese long haul market of the Australian offer. This will assist in creating a buzz about Australia as a dynamic, energetic destination that is a must visit.

We can see from the various attributes of Close to Home and Ready to Leave travellers, that as they become more experienced and interested in long haul travel, they will move along the experience continuum to join other segments of the market. This is one example of how any marketing activities targeted at Self-Challengers and Sightseers will have a flow on affect to the other segments.

Family Connections are an important segment of the market. While they will not be a key focus for national tourism, this lucrative segment offers a potential opportunity for parts of the Australia tourism industry because:

- They represent a valuable niche market within the long haul market with a high proportion indicating they would seriously consider visiting Australia
- Are good yield prospects with a high travel budget

Further Information

This document is one component of a suite of documents Tourism Australia has produced for the Chinese target market.

For a broad snapshot of the Chinese travel market, please refer to:

- Australia's understanding of the Chinese travel market

To understand the global communications target market that Tourism Australia is concentrating on, please refer to:

- Australia's global communications target: the Experience Seeker

For more information on how the Experience Seeker communications target relates to the Chinese segmentation information in this document, please refer to:

- Experience Seekers in China – understanding Experience Seekers in the Chinese market

These documents are available on the Tourism Australia website. Moreover, for any further information you require, please visit the Tourism Australia website at www.tourism.australia.com, or contact your local Tourism Australia office.

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