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## CHINESE VISITOR SATISFACTION

Summary

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## CHINESE VISITOR SATISFACTION - SUMMARY

China is Australia's fastest growing inbound tourism market and largest contributor to international visitor spending in Australia. By 2022–23, the number of Chinese visitors is forecast to increase from 685,000 to 1.4 million and their real inbound tourism expenditure from \$4.4 billion to \$8.2 billion.

Given the China market's significance and potential for further growth, Tourism Research Australia (TRA) on behalf of Tourism Australia has undertaken research into visitor satisfaction. The project's aim is to understand the drivers of satisfaction and causes of dissatisfaction among Chinese visitors, which will inform development of government policy and industry decision-making.

The research is based on interviews with 3,606 Chinese holiday visitors and business travellers (aged 15 years or more) as they departed Australia from the Sydney, Melbourne, Brisbane and Gold Coast international airports. The survey period covered from 2 January to 30 June 2013.

It should be noted that this research was conducted before the introduction of the new China Tourism Law which covers practices such as coercive shopping measures and low price and low quality tours.

This summary presents the key findings from the research and the full report is available on TRA's website, [www.tra.gov.au](http://www.tra.gov.au)

### KEY RESULTS

This summary focuses on those trip attributes that:

- are most and least likely to be associated with higher or lower overall satisfaction
- result in higher or lower likelihood to recommend Australia as a holiday destination
- result in better or worse than expected trip outcomes.

Chinese visitors to Australia were asked to rate a number of attributes on a 10 point scale, where 10 represents extremely good or extremely likely to recommend Australia as a holiday destination. As can be seen in Figure 1, there were high levels of:

- overall satisfaction (90% rating 7 to 10)
- likelihood of recommending Australia as a holiday destination (85% rating 7 to 10).

A large proportion of visitors (83%) reported having a trip that either exceeded (33%) or met (50%) their expectations.

**FIGURE 1: OVERALL SATISFACTION WITH TRIP AND RECOMMENDATION OF AUSTRALIA**



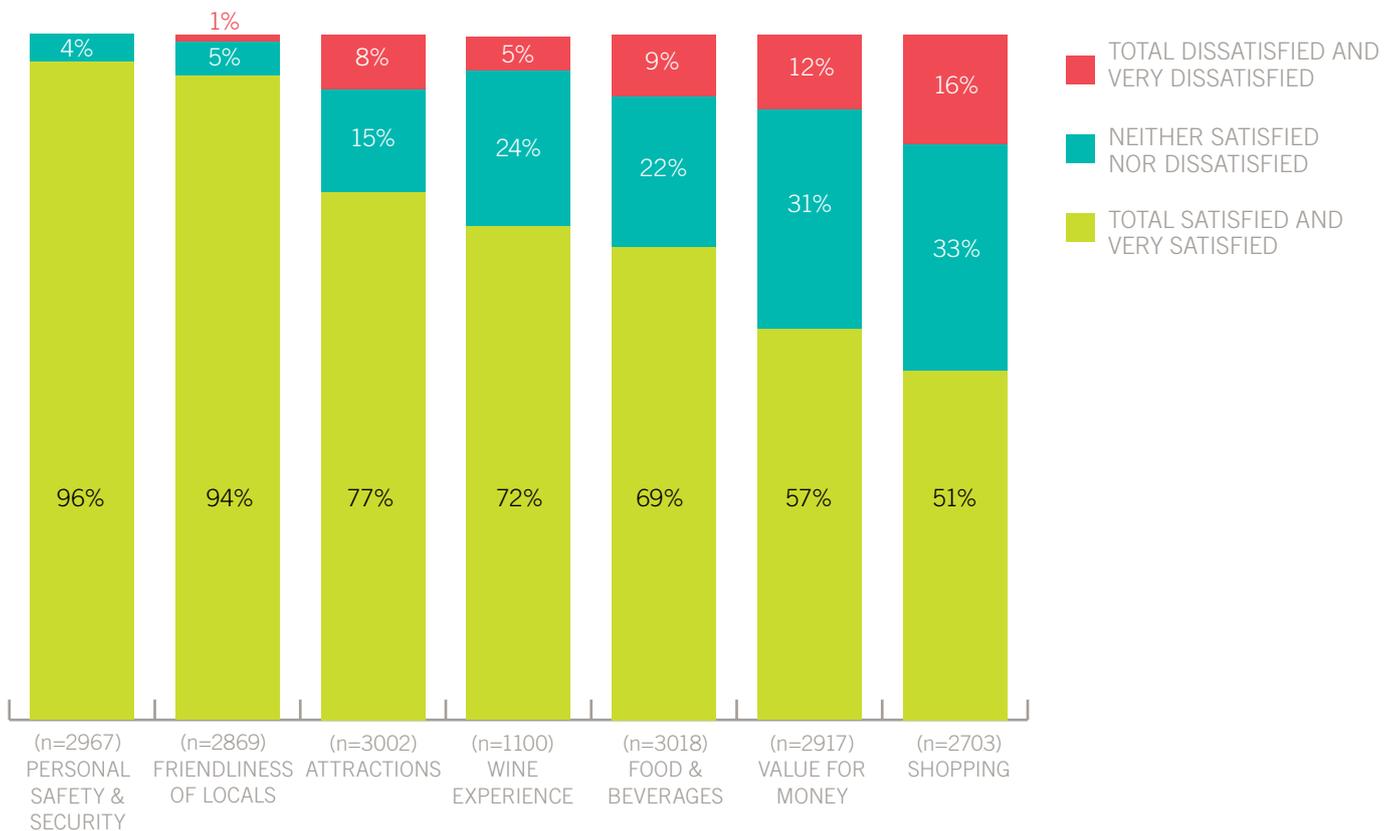
## SATISFACTION WITH TRIP ATTRIBUTES

Chinese visitors had the highest levels of overall satisfaction with:

- *personal safety and security* (96%)
- *friendliness of locals* (94%)
- *attractions* (77%)
- *wine experiences* (72%)
- *food and beverages* (69%).

Dissatisfaction was highest for *shopping* (16%) and *value for money* (12%) (Figure 2).

FIGURE 2: SATISFACTION WITH TRIP ATTRIBUTES



There were a number of trip aspects that were influential in generating positive travel experiences for Chinese visitors.

SATISFACTION WITH THESE ASPECTS	PRODUCES
Australia's attractions	<ul style="list-style-type: none"> <li>Higher overall trip satisfaction</li> </ul>
Value for money	<ul style="list-style-type: none"> <li>Having a better trip than expected</li> <li>A greater likelihood of recommending Australia as a holiday destination</li> </ul>
Shopping	<ul style="list-style-type: none"> <li>Higher overall trip satisfaction</li> <li>A greater likelihood of recommending Australia as a holiday destination</li> </ul>

Likewise, dissatisfaction with certain trip aspects can generate negative travel experiences for Chinese visitors.

DISSATISFACTION WITH THESE ASPECTS	PRODUCES
Australia's attractions	<ul style="list-style-type: none"> <li>Lower overall trip satisfaction</li> <li>Having a worse trip than expected</li> </ul>
Value for money	<ul style="list-style-type: none"> <li>Lower overall trip satisfaction</li> </ul>
Shopping	<ul style="list-style-type: none"> <li>Having a worse trip than expected</li> <li>Lower likelihood of recommending Australia as a holiday destination</li> </ul>
Food and beverages	<ul style="list-style-type: none"> <li>Lower overall trip satisfaction</li> <li>Lower likelihood of recommending Australia as a holiday destination</li> </ul>

Dissatisfaction with Australia's *attractions* did not affect the likelihood of Chinese visitors recommending Australia as a holiday destination.

There were certain trip attributes that visitors expected as part of their experience:

EXPECTED TRIP ATTRIBUTE	IF DELIVERED, PRODUCES	IF NOT DELIVERED, PRODUCES
Personal safety and security	Almost no improvement in trip outcomes	A strong, negative influence on visitors' trip experience
Friendliness of locals		

### KEY DRIVERS FOR CREATING A POSITIVE TRAVEL EXPERIENCE FOR CHINESE VISITORS TO AUSTRALIA:

- Attractions
- Value for money
- Shopping

### RECOMMENDATIONS

- Develop strategies to maintain and enhance these features of a trip to Australia.
- Similarly, develop strategies to reduce the likelihood of dissatisfaction in these areas, as well as *food and beverages*, as dissatisfaction with any of these attributes can have more substantial negative impacts on the visitors' travel experience.

44% of Chinese visitors cited Australia's unspoilt natural environment as the single best feature of Australia.

## SATISFACTION WITH NATURE-BASED AND OTHER TRAVEL EXPERIENCES

DESIRED EXPERIENCES	% OF CHINESE VISITORS WHO DESIRED THIS EXPERIENCE	% OF CHINESE VISITORS WHO HAD THIS EXPERIENCE, AND IT EXCEEDED THEIR EXPECTATIONS	% OF CHINESE VISITORS WHO HAD THIS EXPERIENCE, AND IT DID NOT MEET THEIR EXPECTATIONS
Nature-based	65%	58%	8%
		These visitors were more likely to:	These visitors were more likely to:
		<ul style="list-style-type: none"> <li>■ Be highly satisfied overall</li> <li>■ Have a better trip than expected</li> </ul>	<ul style="list-style-type: none"> <li>■ Have a worse trip than expected</li> <li>■ NOT advocate Australia as a holiday destination</li> </ul>

Nature-based experiences are a major draw-card for Chinese visitors. Exceeding expectations for nature-based experiences improves the likelihood of a positive travel experience.

Besides nature-based experiences, relaxation and rejuvenation (47%) was the next most desired experience among Chinese visitors. A high level of visitors who had this experience (88%) said their expectations were met or exceeded.

Other desired experiences included:

- An opportunity to experience Australia's history and culture (17%)
- Good shopping (9%)
- Food and wine (8%)
- Luxury and indulgence (5%).

### RECOMMENDATIONS

- *Nature-based experiences* should be a key focus of marketing activities directed at Chinese visitors, taking into account the following *Nature-based experiences* that most appeal to them:

- Australia's beaches
- The Great Barrier Reef
- Wildlife
- Whale/dolphin watching
- National parks
- Bushwalking
- Water-based activities (e.g. scuba diving, sailing, kayaking).

## SATISFACTION WITH FOOD AND BEVERAGES IN AUSTRALIA

Chinese visitors generally expect to consume *Chinese food* while in Australia.

### FREQUENCY OF CHINESE FOOD CONSUMPTION

At some point on their trip	98%
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Every day or most days	80%
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### QUALITY OF CHINESE FOOD - RATINGS BY CHINESE VISITORS

Average	57%
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High	29%
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Poor	13%
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### QUALITY OF CHINESE FOOD - RATINGS BY TRAVEL GROUP

Free & independent travellers	
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High	39%
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Poor	7%
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Group-tour visitors	
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High	22%
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Poor	18%
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The quality of *Chinese food* was an important component in creating a positive or negative trip experience.

Visitors who rated the quality of *Chinese food* as HIGH were more likely to:

- be satisfied with their trip overall
- have trip outcomes better than expected
- recommend Australia as a holiday destination.

Visitors who rated the quality of *Chinese food* as POOR were more likely to:

- have low overall satisfaction
- have a trip worse than expected
- NOT recommend Australia as a holiday destination.

Just as importantly, consuming *Western food* added to the likelihood of a positive travel experience, particularly among younger and free and independent travellers. This group expected and were more likely to consume *Western food* as part of their travel experience (apart from breakfast).

The one-third of Chinese visitors that ate *Western food* every day or most days were more likely to have a trip better than expected, while those that never ate *Western food* had lower overall trip satisfaction.

## RECOMMENDATIONS

- To enhance trip outcomes, strategies to promote and enable increased access to restaurants providing high quality *Chinese* and *Western food* should be developed.
- In the first instance, efforts could target tour operators, as group-tour visitors are among those least satisfied with the food offered during their trip.
- Increase the *Chinese food* options available to visitors at breakfast time.
- Increase opportunities for consuming *Western food* during the trip except at breakfast.

## SATISFACTION WITH AVAILABILITY OF CHINESE LANGUAGE SERVICES

Overall, 51% of Chinese visitors were satisfied with the *availability of Chinese language services* provided in Australia.

Visitors who were dissatisfied with the *availability of Chinese language services* (29%) were more likely to:

- have worse trip outcomes than expected
- NOT recommend Australia as a holiday destination.

## RECOMMENDATIONS

- There needs to be an ongoing commitment to increasing the *availability of Chinese language services*. This will minimise the negative impact that dissatisfaction with this trip attribute can have on trip outcomes and likelihood to recommend Australia as a holiday destination.
- Efforts could focus on groups with particularly high dissatisfaction, such as visitors departing from the Gold Coast, older Chinese visitors and free and independent travellers. Note, however, that satisfaction with these services did not significantly improve the travel experience.

The *language barrier* (37%) was one of the main reasons cited by visitors for not recommending Australia.

## SATISFACTION OF GROUP-TOUR VISITORS AND FREE AND INDEPENDENT TRAVELLERS

Group-tour visitors represented 57% of Chinese visitors to Australia, with the remaining 43% being free and independent travellers.

Group-tour visitors had poorer travel experiences than free and independent travellers, reporting lower overall satisfaction, inferior trip outcomes and lower likelihood to recommend Australia. Furthermore, they are less likely to be satisfied with a number of trip attributes that contribute to a positive travel experience, namely: *attractions, shopping and food and beverages*.

Overall, 11% of group-tour visitors were dissatisfied with the *attractions* they visited.

The main reasons included:

- attractions were not interesting enough (51%)
- not enough time spent at attractions (38%)
- not enough attractions visited (26%)
- attractions visited were of low quality (19%).

In relation to *nature-based experiences*, Australia's unspoilt natural environment was cited as the single best experience on their trip to Australia by 45% of group-tour visitors and 42% of free and independent travellers.

### SATISFACTION WITH NATURE-BASED EXPERIENCES BY TRAVEL GROUP

	GROUP-TOUR VISITORS	FREE AND INDEPENDENT TRAVELLERS
<i>Expectations exceeded for nature-based experience</i>	53%	65%
<i>Nature-based experience failed to meet expectations</i>	10%	4%

The majority (83%) of group-tour visitors wanted to do more outdoor/nature activities.

The single worst experiences in Australia for group-tour visitors were:

- tour organisation/service (23%)
- quality of food (9%)
- attractions (7%).

Clearly, many group-tour visitors were seeking a better quality experience.

With the exception of *value for money*, visitors on group tours were less satisfied than free and independent travellers with the trip attributes that most influence a positive travel experience, namely, *attractions, shopping, and food and beverages*.

Free and independent travellers were more likely (39%) than total visitors (29%) to rate Chinese food highly. Group-tour visitors were more likely to rate Chinese food poorly (18%) than all visitors combined (13%).

## RECOMMENDATIONS

Suggested areas of improvement for tour operators include:

- enhance the level of organisation and service delivered to their clientele
- be more selective about the quality of shopping and eating establishments they visit and to which they return
- build on the quality of Chinese dining experiences offered, particularly by group-tours
- increase the opportunities for their clientele to eat Chinese food at breakfast and Western food at lunch and dinner
- make attractions and activities more interesting by being more discerning about the types they choose and retain on their itineraries
- increase the number of attractions visited and time spent at these by having less shopping and fewer visits to pubs/clubs/casinos
- place more emphasis on quality nature and outdoor activities as part of their attractions mix.

FIGURE 3: SATISFACTION OF GROUP-TOUR AND FREE AND INDEPENDENT TRAVELLERS

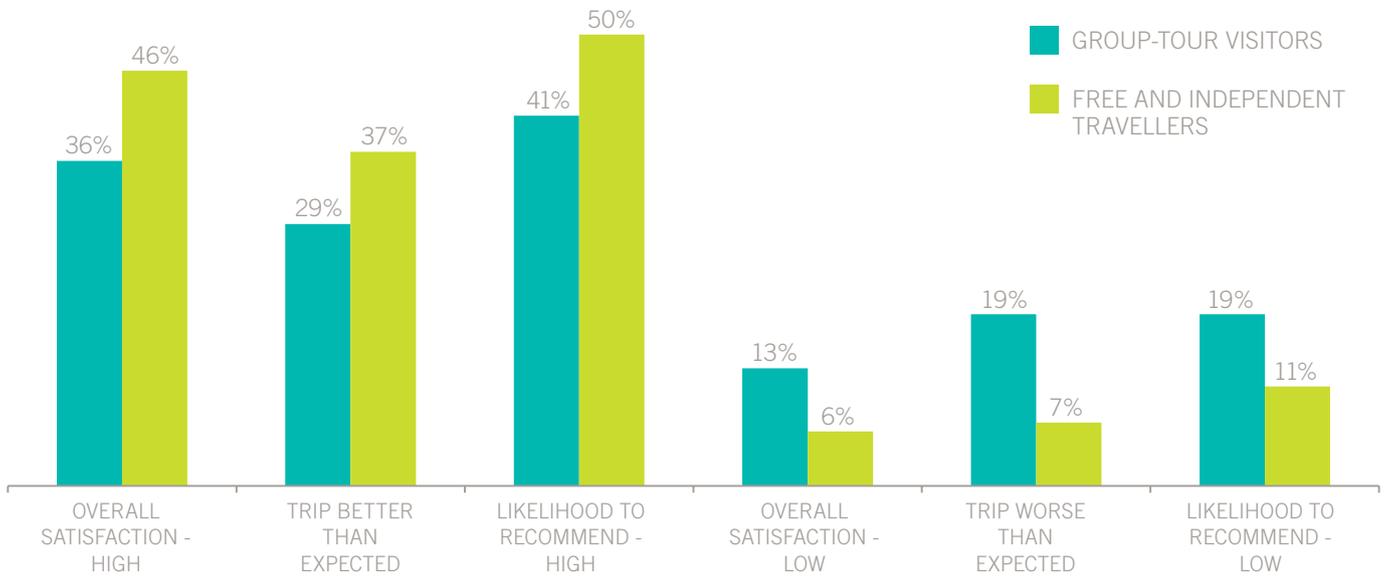
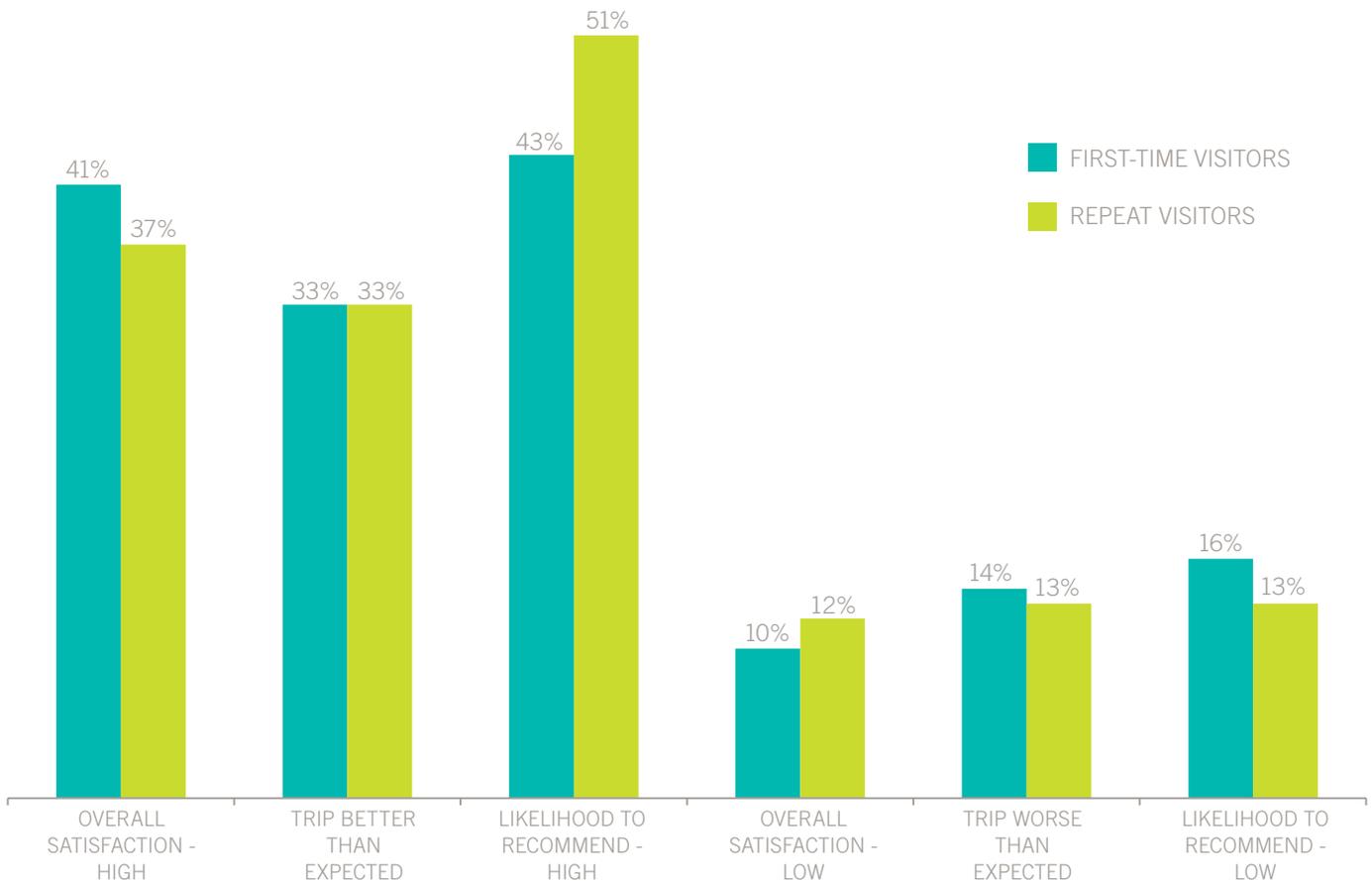


FIGURE 4: SATISFACTION OF REPEAT AND FIRST-TIME VISITORS



## SATISFACTION OF REPEAT AND FIRST-TIME VISITORS

Nearly one-third (30%) of Chinese visitors had visited Australia before, while 70% were first-time visitors.

In spite of having a higher rate of satisfaction with their *shopping, food and beverages, wine and nature-based experiences*, repeat visitors were less likely than first-time visitors to be highly satisfied overall. In contrast, they were more likely to recommend Australia as a holiday destination (Figure 4). This apparent contradiction may reflect that they knew what to expect from their visit, having experienced Australia before.

## RECOMMENDATIONS

- Given repeat visitors were more likely to travel independently and/or unaccompanied, improving access to Chinese language signs, maps and brochures may assist.
- Repeat visitors were also more likely to consume Chinese food (including for breakfast), so increasing information on good quality Chinese restaurants could be useful.