

Understanding the Chinese Free and Independent Traveller (FIT)





Chinese travellers have been identified as a growth market for Queensland. This opportunity has resulted from a range of interconnected factors including: an increase in direct flights from China; an easing of travel restrictions across many regions in China; efficiencies in the visa application process; and greater access to the internet in China.

The main catalyst is an increase in Chinese travellers considering independent travel, in particular those aged between 25 and 40 years of age. Key indicators suggest that the Chinese group tour market will also remain an important market for Queensland.

The traveler profile for Chinese visitors to Queensland is 52% group and 48% free and independent traveler (FIT). FITs refer to those who structure their own travel. They search for information themselves and make decisions based on their experiences, internet research and recommendations from friends, relatives or social media rather than the travel packages available. Structuring their own travel may include making some purchases through a travel agent, such as flights, accommodation and visas or perhaps even an itinerary (that includes some free days).



In the year ended June 2018, visitors from China accounted for **19 PERCENT** of all visitors to Queensland



In total, they spent **\$1.32 BILLION** in the state, an increase of **30 PERCENT** on the previous year¹

Chinese visitors to Australia have the potential to grow to **13 BILLION** in **TOTAL EXPENDITURE** by the year 2020²





A QUICK SNAPSHOT OF CHINESE FITS

The majority:

- Can speak some English
- Have a university education
- Are married with children
- Two thirds of passport holders were born after 1980
- Are confident experienced travellers
- Want flexible travel options
- Want to experience and enrich their knowledge of a different culture
- Like to eat local food and spend time with local people
- Are digitally savvy
- Are heavy travel researchers and planners
- Are likely to have travelled outside of Asia previously

Their recent travel habits⁴

- USA is the destination outside of Asia most visited by Chinese. Other prominent destinations include France, Germany and Australia.
- Forty per cent of Chinese consumers travel as a couple
- The majority were away from home for six to 10 nights on their last independent trip outside of Asia.
- There is a shift towards semi-independent and fully-independent travel in recent years with just under half of trips as tour groups.
- Peak travel months for Chinese consumers are February, July and August, with lead times typically falling between one to two months.

What they want when travelling outside of Asia

Chinese FITs are looking for new experiences, travelling further afield, staying away longer and spending more. When selecting a holiday destination, they are looking for somewhere safe that offers world class nature, good food and wine, and aquatic and coastal experiences that provide value for money.⁵

THIS GROUP OF TRAVELLERS PREFER INDEPENDENT TRAVEL OVER GROUP TRAVEL. THEY ENJOY THE FREEDOM OF FOLLOWING THEIR OWN SCHEDULE AND HAVING GREATER CONTROL OVER WHAT THEY DO, EAT AND SEE.

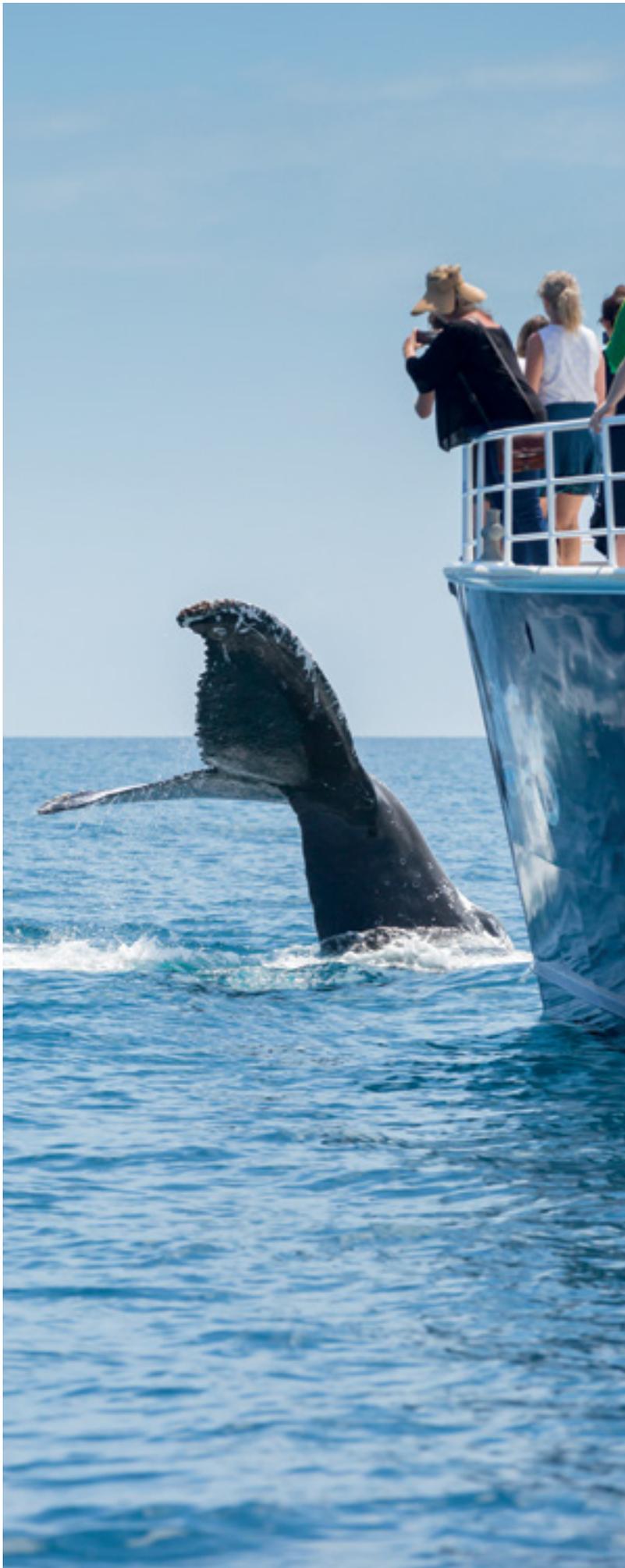
How they want to feel when travelling outside of Asia

Chinese FITs summarise how they want to feel on holidays as cosiness, curiosity, passion and trust. **Cosiness** is the feeling most desired and is described as happiness, true enjoyment, not having a care in the world and being in a clean and pristine environment. **Curiosity** is the ability to gain knowledge while enjoying yourself or trying something on impulse. **Passion** is doing what you want (pursuing dreams) and reconnecting with loved ones. **Trust** is being in a safe, unpolluted environment with good safe food.⁶

Barriers to travel outside of Asia

The number one barrier for travel outside of Asia noted is 'language'. However, Chinese FITs are not as concerned with language barriers as less experienced Chinese travellers.⁷ In addition, this barrier is less of a concern when considering a visit to Australia as most Chinese FITs can speak some English.

Other barriers to travel outside of Asia include the visa application process, limited information about the destination and safety concerns at the destination.



Their thoughts on Australia

Australia is a 'must visit' holiday destination amongst Chinese travellers, making it to the top of the consideration set in terms of aspiration, awareness of experiences and intention to visit.

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

Perceptions of Queensland are focused on The Great Barrier Reef, stunning natural scenery, diverse wildlife or sunny beaches, with Gold Coast, Cairns and Brisbane featuring high on the consideration set as well as awareness and intention to visit.⁸

WHEN ON HOLIDAYS THEY
WANT TO FEEL HAPPY,
COMFORTABLE, IN TUNE WITH
NATURE AND CAREFREE.

Their trip planning process

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

They use a combination of online and offline sources for planning and inspiration. Key sources include personal recommendation, travel review websites, online travel agents, travel TV programs and offline travel agents.⁹

The Chinese FITs' planning process includes a number of steps. These steps do not necessarily proceed in a linear manner.

Key actions and influences

The trip planning process usually takes 1-3 months

DESIRE TO TRAVEL



Fuelled by what they see and do during their normal day-to-day activities.

External influences such as:

- Ads
- Friends & family
- Blogs
- TV shows
- Books
- Social media

PLANNING FOR THE TRIP



At this stage they decide on the best time to go, how long they will travel for and where they are going.

Prices of hotels, flights and things to do are sourced and compared. Details of the visa application process are also investigated.

A general plan is formed using a combination of online and offline sources for planning and inspiration.

COLLECTION OF INFORMATION



Key sources include personal recommendation, travel review websites, online travel agents, travel TV programs and offline travel agents.

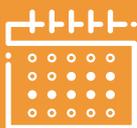
RESERVATIONS



Bookings are confirmed and paid for during this stage and generally include flights and accommodation. They may also include car rental and/or attraction tickets.

Further research on their Itinerary is conducted such as places to visit, things to do, food to eat, where to shop, what things typically cost and distances between locations. A list of 'must do's' and a timetable are often created.

ITINERARY



PREPARING FOR THE TRIP



Then they pack what they will need for key activities planned such as bathers or a winter coat.

- Download relevant mobile apps
- Check the weather forecast
- Shop for any missing necessities

ON HOLIDAYS

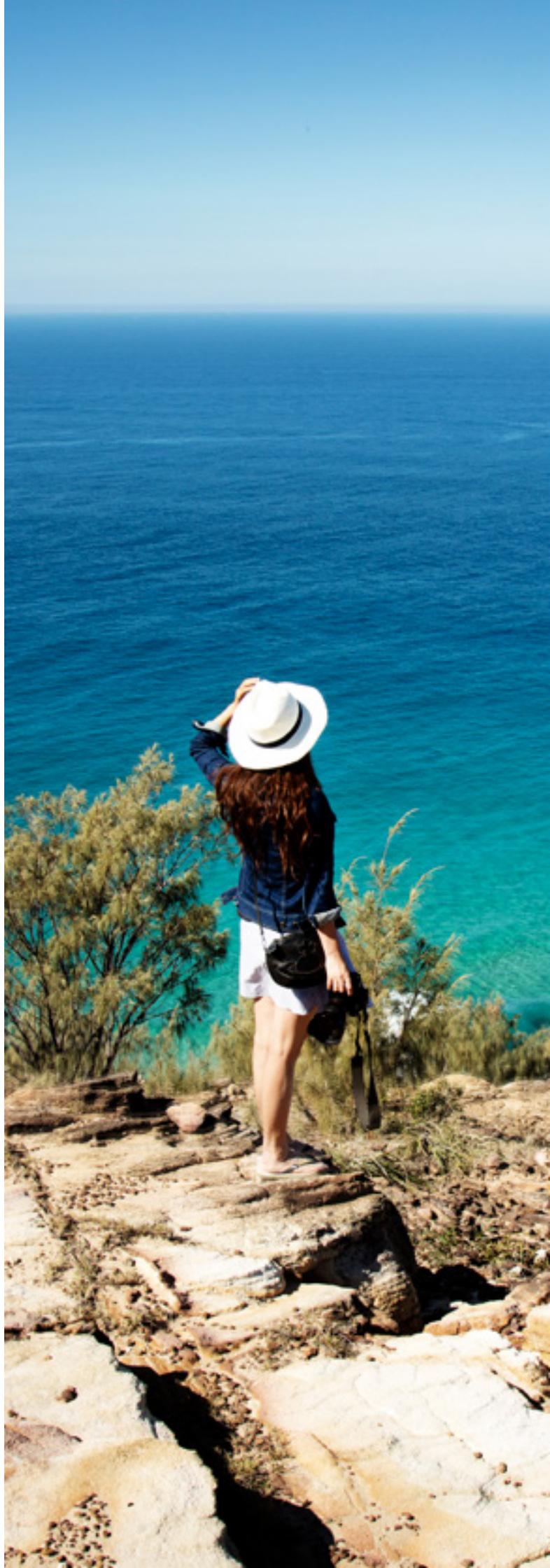


Once at their holiday destination any further research is typically carried out on a mobile device.

Marketing hints

- In China the preference for independent travel is more related to lifestyle and attitude than demographics
- Consider how to best capture how Chinese FITs want to feel on holidays in the tone and phrasing of copy
- Use iconic natural and man-made attractions in marketing collateral. In addition, showcase attractions and landscapes that highlight their special or unique features
- Avoid just using Chinese talent in collateral, Chinese FITs like to experience the local culture and see locals enjoying the experience
- Demonstrate that there is a good mix of activities available at the destination
- Chinese FITs look for goods and services that provide good value for money
- Avoid overly adventurous imagery and language in marketing materials
- Chinese FITs are digitally savvy
- On holidays, independent travellers are more likely to use their mobile device as an information source than the hotel concierge. They use their mobile device to store apps for use on holidays and for any further planning during the holiday
- Chinese FITs are heavy planners that are interested in detailed information about the destination. Practical travel advice appeals to this market, such as where to access WI-FI, weather forecasts, and information about how and where to access prepaid mobile SIM cards.
- Websites with easy navigation and eye-catching pictures are desired and will help build a positive impression of the destination
- Provide Chinese FITs the opportunity to create their own itinerary and package inclusions by offering flexible booking options

For further information on all Chinese travellers and Chinese tour group travellers, please see **The Chinese Traveller, A segmentation of the market** and **Knowing the Customer China**





References

- 1** Tourism and Events Queensland International Tourism Snapshot YE June 2018
- 2 / 4 / 5** Tourism Australia China Market Profile 2017
- 3 / 9** Tourism and Events Queensland, Unpacking the Chinese Leisure Traveller 2018
- 6 / 7** Tourism and Events Queensland GfK Custom Research China - China Independent traveller
- 8** Tourism Australia Introducing the Chinese High Value Traveller

This document is part of Tourism and Events Queensland's suite of China Cultural Information and Training Resources for Tourism Operators. For more information, including the opportunity to hear pronunciations of common greetings, see queensland.com/china

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