

## **THE CHINESE ECOTOURISM MARKET**

This Fact Sheet provides a brief overview of travel behaviour and motivations of the Chinese Ecotourism Market. The information provided here is based on a market research study commissioned by the Destination Australia Market Alliance (DAMA). The study investigated travel behaviour and motivations of long-haul travellers in key international markets<sup>i</sup>. The total sample size for China was 1016 persons who were interviewed in their home country. Further secondary data analysis of the DAMA research was commissioned by Tourism Queensland to identify and profile tourists specifically interested in Ecotourism experiences.

### ***Ecotourist Definition***

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For the purpose of this research, an Ecotourist is defined as someone who did at least one of the following activities on their last long haul holiday<sup>ii</sup>:

- Saw wildlife in its natural surroundings
- Stayed in the wilderness
- Visited a rainforest/ jungle
- Visited national parks

And agreed that they look for at least one of the following activities:

- Environmental/ ecological sites to visit
- See wildlife in natural surroundings
- Walk in untouched countryside and natural environments

And sometimes plan holidays around at least one of the following activities:

- Bird or animal watching
- Camping
- Nature/ ecological/ environmental/ wilderness activities
- Walking/ hiking/ bush walking/ rainforest walking/ rambling
- See wildlife in natural surrounds

## Interest in Ecotourism among Chinese Tourists

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Using the above definition, 28% of all Chinese tourists who participated in the original study qualify as Ecotourists.

A very large percentage of Chinese Ecotourists stated they were looking for activities such as “seeing wildlife in natural surroundings” (79%); visiting environmental/ecological sites” (68%) or “walking in untouched countryside or natural environments” (60%) in a long haul holiday. Approximately half of the Chinese Ecotourists sometimes plan their holiday around nature-based activities (48%). The following tables show further detail.

Activities participated in on last holiday	
Saw wildlife in its natural surroundings	22%
Visited National Parks	13%
Stayed in the wilderness	10%
Visited a rainforest/jungle	5%

Activities looked for in a long haul holiday	
See wildlife in natural surroundings	79%
Environmental/ecological sites to visit	68%
Walk in untouched countryside and natural environments	60%

Activities that holidays are sometimes planned around	
Nature/ecological/environmental activities/wilderness	48%
See wildlife in nature surroundings	32%
Camping	32%
Bird or animal watching	26%
Walking/Hiking/Bushwalking/Rainforest Walk/Rambling	22%

## Demographic Profile

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Demographic	
<b>Age</b>	Many Chinese Ecotourists are aged between 25 and 34 (36%) with a further 22% aged between 45 and 54 years.
<b>Gender</b>	Chinese Ecotourists tend to be spread evenly across both genders (48% male and 52% females).
<b>Children in household under 18</b>	The majority of Chinese Ecotourists (68%) do not have children under the age of 18 in their household; 29% have only one child.
<b>Household Income</b>	The majority of Chinese Ecotourists (67%) have a monthly household income of 5,000 – 14,999 renminbi (AUD\$803 - \$2405). <sup>1</sup>
<b>Employment status</b>	74% of Chinese Ecotourists are working full time (30 or more hrs per week).
<b>Education Level</b>	The majority of Chinese Ecotourists have completed at least two to three years college level (34%) or university level or higher (36%).
<b>Travel Party</b>	In China, the size of travel parties spreads almost evenly between “no others” to “five or more”. Compared to other countries, a remarkably large proportion travel in groups of five and more (29%).
<b>Marital Status</b>	Chinese Ecotourists primarily tend to be married/living as married/living with partner (63%).

<sup>1</sup> Australian dollar conversions made using August 2005 exchange rates.

## Travel Planning

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### Types of accommodation

During their previous long-haul holiday, the vast majority of Chinese Ecotourists stayed in luxury (4-5 star) hotels (39%) or moderate (2-3 star) hotels (36%). Only very small numbers stayed at all inclusive resorts (7%); B&B's/Guesthouses/lodges/farmstays (5%); self-catered villas/apartments (5%); backpackers (4%); budget hotels (2%) or tents (1%).

### Booking timeframes

Chinese Ecotourists typically started planning their long-haul holidays within the three months prior to departure (68%). Only 10% started planning one year or more prior to departure.

### Organising Previous Holiday

Chinese Ecotourists tend to book many components of a long-haul trip prior to leaving their home country. About half of the Chinese Ecotourists (46%) had organised all flights/transport, all accommodation, some or all meals, and tours/activities prior to leaving their home country.

### Inspiration and Travel Ideas for Long-Haul Holidays

In China, the top five sources of inspiration for travel and ideas for Ecotourists are:

1. Friends who have been there (28%)
2. Brochures/ advertisements from a tour company (23%)
3. TV travel programmes (22%)
4. Internet Travel Sites (21%)
5. Colleagues (18%)

### Sources of information to research travel destinations

In China the top three sources of information used by Ecotourists are Internet travel sites (37%), tour operators (33%), and the TV (32%).

Sources of information to Research Destinations	Percentage
Internet travel sites	37%
Tour operators	33%
Look out for things on the TV	32%
Airlines – internet	30%
Newspaper articles/ travel sections	30%
Friend or relative who has visited the country	29%
Magazine articles/ travel sections	29%
Friend or relative living in the country	27%
Specialist travel magazines	26%
China National Tourism Administration	26%

### Media habits

Among the TV programmes viewed by Chinese Ecotourists, "Travel and Leisure programmes" rate third (62%) after International News (72%) and Domestic News (71%).

The favoured type of magazine read by Chinese Ecotourists tends to be travel magazines (57%).

## Travel behaviour

### Destinations considered and factors influencing choice of destination

For Chinese Ecotourists, the top holiday destination seriously considered is Australia (70%) followed by Japan (38%). For Chinese Ecotourists, the choice of destination largely depends on "whether it is worth the money" (86%); "how welcoming the country is to Chinese people" (82%) and "recommendations from family or friends who have been there" (79%).

#### Key Factors Influencing Choice of Destination:



### Number and length of last long haul holiday

The majority of Chinese Ecotourists have only taken one (35%) or no (43%) long haul holiday in the last five years. Of those who have taken at least one long-haul holiday in the past five years, the majority of trips were less than two weeks in duration (61%).

### Motivations of going on long-haul holidays

For Chinese Ecotourists the top three motivations of going on a long-haul holiday are "to have fun" (96%), "to relax and take it easy" (95%) and "to see famous sights and landmarks" (94%).

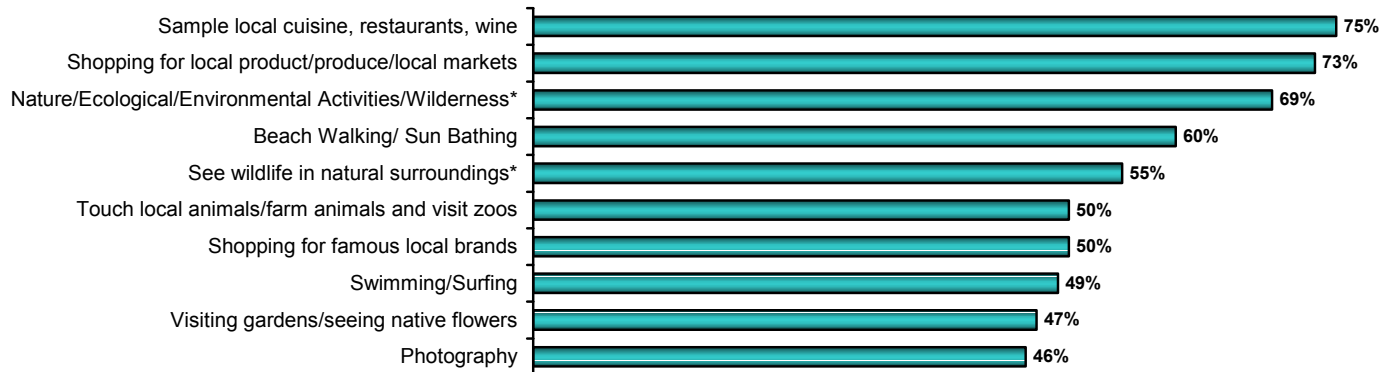
Motivations of going on long-haul holidays	Percentage
To have fun	96%
To relax and take it easy	95%
To see famous sights/ landmarks	94%
Sample local cuisine, restaurants, food & drink	93%
See wildlife in natural surroundings*	92%
To experience a different culture	92%
To bring back interesting stories and souvenirs	89%
To go somewhere that welcomes Chinese people	85%
To spend time with friends by going on holiday together	85%

\* Ecotourism defining variable.

### Activities that holidays are often planned around

For Chinese Ecotourists the top three activities that holidays are often planned around are “sampling local cuisine, restaurants, wine and drink” (75%), “shopping for local produce/local markets” (73%), and “nature/ecological/environmental activities” (69%).

### Top 10 Activities which holidays are often planned around



\* Ecotourism defining variable.

## Travel to Australia

### Attitudes of Chinese Ecotourists towards Australia

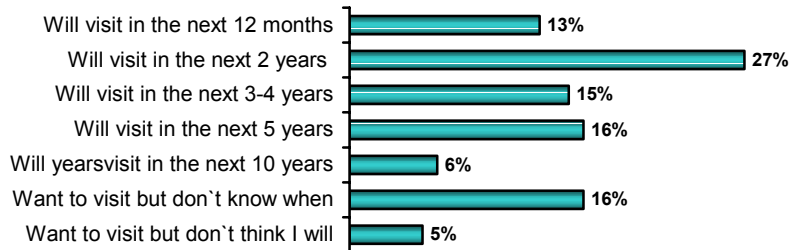
For Chinese Ecotourists the top three attitudinal statements towards Australia as a travel destination are: “Australia has world must-sees” (93%); “Australia has a huge variety of unique wildlife and habitats” (92%), and “Australia is a comfortable and safe place to travel around on holiday” (91%).

### Top 10 Attitudes of Chinese Ecotourists towards Australia



## Visiting Australia

The majority of Chinese Ecotourists have never travelled to Australia (85%). A large percentage (40%) are expecting to visit Australia at some point in the next two years, with a further 37% expecting to visit Australia within the next ten years. The majority of these prospective visitors intend on staying for two weeks or less (73%).



Amongst those likely to travel to Australia in the next two years, the majority would "visit a couple of regions to get a feel for Australia's diversity" (49%) or "visit several different regions to see as much as they can" (35%).

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**A full report is available on request.**

### Further Information

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<sup>i</sup> For China, long-haul holiday destinations as specified in the DAMA questionnaire, are all destinations other than Asia but including India, Japan, Korea, Maldives, Mongolia, Nepal, Tibet and Vietnam.

<sup>ii</sup> Tourism Queensland acknowledges that a universal definition of an Ecotourist does not exist. A limitation of the definition used for the purpose of this analysis is that it is based on the selection of the most appropriate variables from the existing DAMA research.