# CHINESE TOURISM TO NEW ZEALAND

**Discussion Paper**

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## 1. Introduction

China's outbound tourism is growing at a fast rate, and the World Tourism Organisation (WTO) sees China as an increasingly important player as both tourism destination and country of origin (Kester, 2002). In 2001, over 12 million Chinese travelled overseas, mainly to Hong Kong, Macau, Thailand, Japan, Russia, United States, Korea and Singapore, and on present trends it is estimated that in 2020 China will be the fourth largest (after Germany, Japan and the United States) source for outbound tourism worldwide with 100 million international tourists (WTO, 2003).

In response to this increasingly important market, it is critical for potential destinations to understand the nature of the Chinese outbound market. For New Zealand, it is important not only to increase numbers and yield of Chinese visitors, but also to ensure that this growth accords with the sustainability goals outlined in the Tourism Strategy 2010 (Tourism Strategy Group, 2001). One important feature of this strategy is the efficient use of resources in terms of greenhouse gas emission as a result of tourist activity. This discussion paper collates information on Chinese outbound tourists from various New Zealand and international sources. Data on Chinese visitors, obtained from the International Visitor Survey (IVS) by Tourism New Zealand (TNZ), are analysed to gain a better understanding of how Chinese currently travel in New Zealand and what developments could be expected. Particular attention will be given to transport behaviour, as this is a key factor of energy consumption and emissions.

## 2. Regulations for outbound travel from China

Travel to and from China is regulated by the China National Tourism Administration, which is the ministry in charge of tourism in China. Three different passports are available for travellers from China: public passports, private passports and passports for seamen (WTO, 2003). Travellers who travel on a public passport (technical travellers) include government officials, employees of state-owned enterprises, and other people sent abroad by the government. Until recently the majority of travellers fell into this category, although many of the business trips were often really tourist travel (Asia Pacific Foundation of Canada, 2002). Private passports can be issued for the purpose of visiting friends and relatives, studying overseas and for travel. Three principles have to be considered with regard to holiday travel from China: first, tourists have to be part of a tour group; second, the tour group has to be organised by a qualified and authorised travel agency (Category A agency, see Wen Pan & Laws, 2001); and third, the tour must go to an approved destination[1] (Yali, 2003). The Approved Destination Status (ADS) is a bilateral agreement that allows Chinese to visit a specific country (WTO, 2003). Nineteen countries have an operational ADS agreement with China; Australia and New Zealand being the only Western industrialised countries to have one. It is possible that the ADS system may cease, as regulations for outbound travel continue to be relaxed (WTO, 2003).

## 3. Characteristics of Chinese outbound tourists

Chinese overseas travellers are mainly from high- to middle-income groups, namely private enterprise owners, professionals (lawyers, scientists etc.), and representatives from media, sports and entertainment. Travel statistics show that the majority of Chinese tourists now travel for private reasons (57.3% in 2001, WTO, 2003). Disposable income is generally low in China and so for many potential tourists cost is an important factor in product choice, especially for first-time travellers (Asia Pacific Foundation of Canada, 2002). For example, March (1998) noted that Chinese holiday-visitors in Australia spend little on accommodation and food, preferring to stay in budget three-star accommodation. In contrast, business tourists typically prefer high-class accommodation (Wen Pan & Laws, 2001). Potentially, Chinese tourists could be high spenders for the following reasons (WTO, 2003):

[1] Chinese who hold a private passport can also apply for a visa in non –ADS countries. The regulation regarding ADS countries is mostly relevant for group tourism (WTO, 2003).

- When Chinese go on their first overseas trip they have often been waiting to do so for a long time and are willing to spend a lot.
- A Chinese proverb says ‘economise at home, but take enough money en route’.
- Incentive travellers are growing in number, and such tourists have a higher ability to spend.
- Chinese are becoming more sophisticated, and are demanding 4- or 5-star accommodation, for example.
- Shopping is a popular activity with Chinese, especially for souvenirs to bring home to friends and relatives (see also Asia Pacific Foundation of Canada, 2002; Chen, 1998; Wen Pan & Laws, 2001).

Currently, most outbound holiday tourism from China is in the form of an all-inclusive coach tour (Wen Pan & Laws, 2001); free and independent travel (FIT) is currently very limited. Chinese holiday travellers want to experience ‘outstanding scenery, freshness and space’. Other important attributes are safety and cleanliness (Scandinavian Tourist Board, 2002; Asia Pacific Foundation of Canada, 2002). Chinese are very interested in the ‘outside world’ and want to learn about other cultures, especially Western culture. Chinese visitors to Australia reportedly wish to experience beaches, natural attractions and cultural heritage (Wen Pan & Laws, 2001). Despite this interest in foreign cultures, Chinese rarely speak English, and they also prefer to eat Chinese food, although Western food is occasionally experienced as part (sometimes challenging) of a specific cultural experience (Wen Pan & Laws, 2001; comm. W. Arlt). Chinese place great emphasis on status, which leads them to visit the most popular attractions within a destination (Asia Pacific Foundation of Canada, 2002), and to document these visits by the extensive taking of photographs (Wong & Lau, 2001).

## 4. Chinese tourists in New Zealand

New Zealand gained Approved Destination Status in 1999 for Chinese from Beijng, Shanghai and Guangzhaou, and there are 20 approved outbound operators in China who can handle travel to New Zealand. Between 1999 and 2001, New Zealand attracted the highest growth rate (+45%) of Chinese outbound tourists among China’s top 21 destinations. The number of Chinese visitors to New Zealand has increased almost steadily over the last two decades to reach over 70 000 in 2002 (Figure 1).

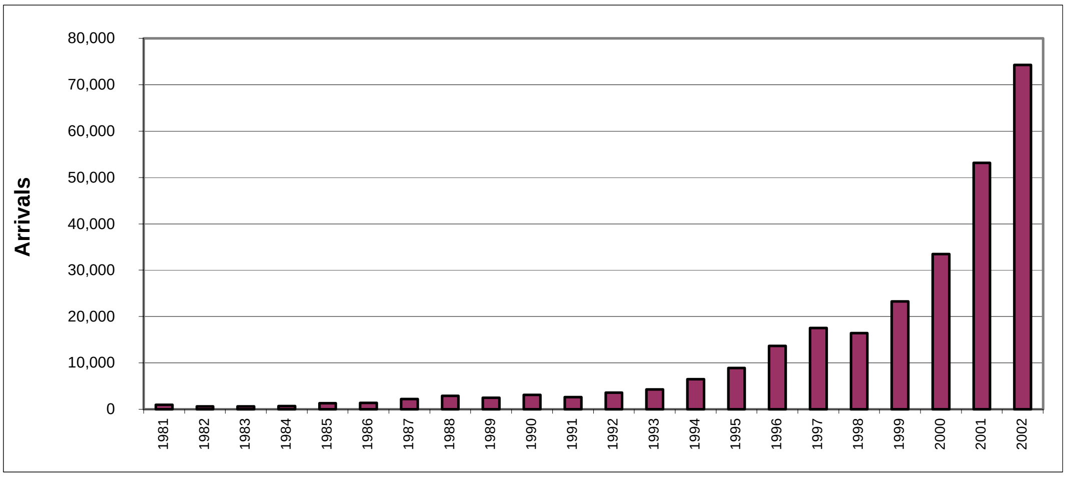


Figure 1. Arrivals of Chinese visitors in New Zealand (Source: Statistics New Zealand, External Migration).

For Chinese it is comparatively expensive to travel to New Zealand and Australia, which are often combined in one trip at a cost of about US$ 2660 for 12 days (WTO, 2003). There is no direct air link from China to New Zealand at present. Overall, there is no clearly preferred time of travel (Wen Pan & Laws, 2001), which makes the Chinese market attractive for off-season tourism (Figure 2). However, the Spring Festival (February) is the most popular time for Chinese from Beijing to travel to Australia or New Zealand, because it is comparatively easy to add annual leave to the seven days of public holidays compared with the other ‘golden weeks’ - hence, tourists during this time are able to take holidays up to 15 days (WTO, 2003).

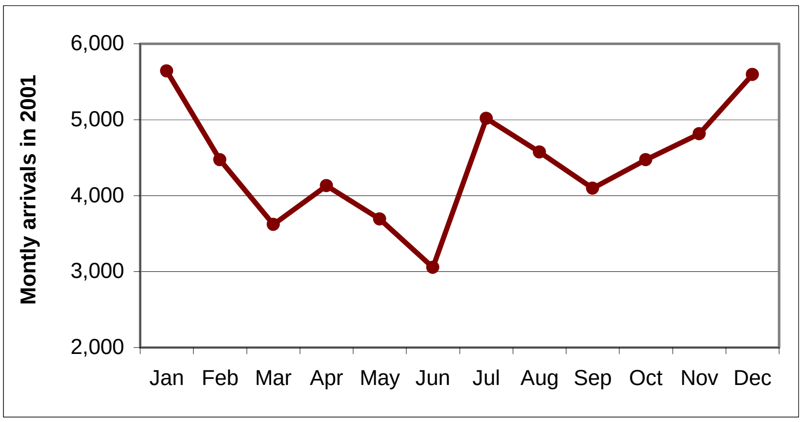


Figure 2. Monthly arrivals of Chinese visitors to New Zealand in 2001 (Source: Statistics New Zealand, External Migration).

Fewer than half the Chinese visitors to New Zealand in 2001 were on holiday, while about one quarter were on business, and 14% were visiting friends and relatives (Statistics New Zealand) (see also further below). A substantial percentage of Chinese tourists to New Zealand are educational visitors. Chinese visitors to New Zealand are typically highly educated, have a high-income, and are experienced and relatively sophisticated travellers (Ryan & Mo, 2001; see also Asia Pacific Foundation of Canada, 2002 for Canada). Notwithstanding their travel experience, safety and uncertainty avoidance still feature highly among Chinese visitors; a reflection largely of their English abilities and cultural values (Chen, 2002).

Ryan & Mo (2001) found four broad reasons why Chinese visit New Zealand (in order of importance): 1) 'social investigative reasons' (friends, relatives, business etc.), 2) 'New Zealand-specific reasons' (e.g. scenery, image); 3) general 'holiday reasons' (e.g. relax); and 4) to 'visit a place not been before'. Overall, the decision to visit New Zealand is linked to the general 'desire to visit a new place', 'New Zealand being packaged with Australia', having a 'relaxing trip', and the 'unpolluted and safe environment' of New Zealand. Among others, Chinese tourists place a lot of importance on, and derive satisfaction from sightseeing, visiting previously unknown places, and having an escape from daily life and work. In terms of activities, Chinese tourists rated the following as important and satisfying elements: experience Maori culture, visit a National Park, see gardens and farms, sightseeing in cities and boat cruises. Older visitors find tours and sightseeing (history) more important, while younger visitors prefer being active. Overall, most Chinese tourists to New Zealand are very satisfied with the service and tour arrangements, although some criticise food and prices in New Zealand. Only 15% of Chinese are likely to return. Those who would return, would do so because of the clean and green country (Ryan & Mo, 2001).

Tourism providers in New Zealand perceive Asian Chinese visitors as comparatively positive, although some negative issues exist, for example the use of 'Asian rates', which are discounted prices as a result of pressure exerted by Chinese agencies. Also, New Zealand operators believe that Chinese have different service needs relating to language and meals, and that they are less flexible in their timing than other groups (Chen, 2002). Chen did not mention unethical practices as reported in Australia, where Korean and Chinese tour operators force tourists into selected restaurants, duty-free shops and other businesses to gain commission (up to 30%), which adds substantially to the price of the low-cost tours (Prideaux, 1997; Radio National, 2002).

# 5. Travel behaviour and decisions made by Chinese visitors in New Zealand

Three different datasets of Chinese visitors were available through the IVS: 1999 (N = 71), 2000 (N = 106) and 2001 (N = 199). These three years are analysed in terms of trip characteristics, travel styles and transport behaviour.

## 5.1 Trip characteristics and expenditure

The most important reason for visiting New Zealand is for a holiday; although the share of holiday visitors decreased between 1999 and 2001 (Table 1). Business is another important travel purpose (26%), while education has become more prevalent reaching 14% of all Chinese tourists in 2001. Overall, Chinese tourism to New Zealand is male-dominated, especially for business travel. Educational tourism is the segment where female tourists are most represented. Chinese visitors are typically in their 30s or 40s, although business visitors tend to be somewhat older and educational tourists are younger on average. Most Chinese visitors are first-time visitors, although the share of repeat visitors among holiday tourists increased from 8% to 12% between 1999 and 2001.

The length of stay depends on the travel purpose: holiday and conference visitors stay for a very short time (less than a week in 2001), business travellers stay somewhat longer (8 days); those visiting friends and relatives tourists and educational tourists stay for longer periods of time (31 and 150 days in 2001, respectively). The average distance travelled within New Zealand is longer for holiday tourists than for other Chinese tourists, although the differences between them are small. Educational visitors travel the least distance, despite their longer stay in New Zealand. Holiday tourists travelled further in 1999 (1,216 km) than in 2001 (806 km).

Expenditure varies greatly between different years and travel purposes. It is possible that the accounting methods in the IVS changed between 2000 and 2001, whereby in 2000 the international airfare seems to be included in the ‘total cost’, and in 2002 the 'total costs' seem to refer to expenditure within New Zealand. More reliable data with a greater breakdown into expenditure categories is required to draw any conclusions.

Table 1 Trip characteristics of Chinese tourists in 1999, 2000 and 2001 (Source: IVS)

| | Holiday | Business | VFR | Conference | Education |
|---|---|---|---|---|---|
| 1999: N=71 | | | | | |
| Share (%) | 52 | 28 | 13 | 3 | 1 |
| Sex (male) (%) | 54 | 75 | 100 | 100 | 67 |
| Age (main groups) | 40-44 yrs 24%<br>30-34 yrs 21%<br>35-39 yrs 19% | 40-44 yrs 30%<br>50-54 yrs 35%<br>35-39 yrs 15% | 30-34 yrs 22%<br>35-39 yrs 22%<br>45-49 yrs 22% | 35-39 yrs 50%<br>40-44 yrs 50% | 30-34 yrs |
| First time (%) | 92 | 90 | 11 | 50 | 0 |
| Stay (days) | 5.6 | 8.9 | 16.4 | 4.0 | 298 |
| Distance (km) | 1216 | 724 | 175 | 525 | 1365 |
| Cost (NZ$)[1)] | 7,967 | 6,970 | 3,192 | 1,784 | 50,000 |
| 2000: N=106 | | | | | |
| Share (%) | 47 | 26 | 13 | 2 | 10 |
| Sex (male) (%) | 55 | 85 | 86 | 50 | 30 |
| Age (main groups) | 40-44 yrs 25%<br>30-34 yrs 14%<br>50-54 yrs 14% | 35-39 yrs 26%<br>55-59 yrs, 19%<br>45-49 yrs 14% | 40-44 yrs 21%<br>45-49 yrs 21% | 25-30 yrs 50%<br>35-39 yrs 50% | 15-19 yrs 50%<br>20-24 yrs 30% |
| First time (%) | 92 | 86 | 64 | 100 | 70 |
| Stay (days) | 7.1 | 6.2 | 30.0 | 3.0 | 91.5 |
| Distance (km) | 926 | 640 | 841 | 390 | 666 |
| Cost (NZ$)[2)] | 7,460 | 9,171 | 15,744 | 11,652 | 9,445 |
| 2001: N=199 | | | | | |
| Share (%) | 39 | 26 | 10 | 10 | 14 |
| Sex (male) (%) | 62 | 89 | 60 | 80 | 57 |
| Age (main groups) | 30-34 yrs 20%<br>50-54 yrs 18%<br>40-44 yrs 14% | 45-49 yrs 27%<br>40-44 yrs 25% | 40-44 yrs 20%<br>45-49 yrs 15%<br>35-39 yrs 15% | 35-39 yrs 30%<br>30-34 yrs 25% | 15-19 yrs 39%;<br>20-24 yrs 32% |
| First time (%) | 88 | 87 | 65 | 85 | 79 |
| Stay (days) | 5.7 | 8.0 | 31.4 | 6.1 | 149.8 |
| Distance (km) | 806 | 846 | 763 | 640 | 348 |
| Cost (NZ$)[3)] | 4,596 | 5,128 | 5,637 | 3,418 | 13,999 |

VFR: visiting friends and relatives
1) 57 tourists provided an answer.
2) 89 tourists provided an answer.
3) 168 tourists provided an answer.

## 5.2 Preferred travel styles

Travel behaviour by international tourists in New Zealand has been described according to travel styles, using information on transport and accommodation choices made in New Zealand (Becken & Gnoth, 2003). Six distinct touring tourist types have been defined: coach, auto, camper, backpacker, visiting friends/relatives (VFR), and comfort traveller. In addition, a further segment of 'stay-put' or 'gateway-only tourists' has been derived, which includes tourists not leaving their gateway of arrival.

The different tourist types can be derived by means of cluster analysis of the IVS[2] data (see Becken et al., 2003; Becken & Gnoth, 2003). Most Chinese visitors travel as 'coach tourists', i.e. as part of an organised coach tour, and preferably stay at hotels. The share of coach tourists has decreased from 61% in 1999 to 51% in 2001. More than one quarter of Chinese visitors (25% in 1999 and 28% in 2001) are gateway-only tourists (mainly Auckland). The percentage of VFR tourists has increased (from 6% in 1999 to 14% in 2001). This tourist type is characterised by staying at private or rented homes, and travelling by private vehicle. Other travel styles are almost insignificant among Chinese tourists; the most prevalent of the free and independent tourist types is the auto tourist at about 5% in 2001.

Travel styles are closely linked to travel purpose (Table 2). Most holiday visitors are coach tourists, although again this share has decreased from 81% in 1999 to 70% in 2001. Business tourists are often coach tourists, when they undertake a sightseeing tour in addition to their business activities. Some business tourists also rent a car (auto tourist). Obviously, a large proportion of visitors with the purpose of 'visiting friends and relatives' as well as 'education' fall into the category of VFR travellers.

Table 2 Dominant travel styles among Chinese tourists in 1999, 2000 and 2001 for different travel purposes.

| | Holiday | Business | VFR | Conference | Education |
|---|---|---|---|---|---|
| Tourist types 1999 | Coach 81%<br>Gateway 11% | Coach 55%<br>Gateway 30%<br>Auto tourist 10% | Gateway-only 78% | Coach 50%<br>Gateway 50% | VFR 100% |
| Tourist types 2000 | Coach 76%<br>Gateway 14% | Coach 48%<br>Gateway 37%<br>Auto 15% | Gateway 50%;<br>VFR 50% | Coach 50%<br>Gateway 50% | VFR 40%<br>Gateway 40% |
| Tourist types 2001 | Coach 70%<br>Gateway 13% | Coach 65%;<br>Gateway 23% | Gateway 45%;<br>VFR 45% | Coach 50%<br>Gateway 45% | Gateway 54%<br>VFR 39% |

[2] For more information on the IVS refer to the Tourism Research Council's homepage at http://www.trcnz.govt.nz/Surveys/International+Visitor+Arrivals/default.htm

## 5.3 Transport and accommodation decisions

Transport behaviour is a very important factor in the context of sustainable tourism, mainly because of its implications for energy consumption and greenhouse gas emissions. An analysis of typical travel distances associated with specific transport modes allows conclusions about spatial mobility and fuel usage. Average travel distances by Chinese tourists (typically less than 900 km per trip, see Table 1) are lower than the average of all international tourists (1500 km in 2001, Becken & Cavanagh, 2003). As was already apparent in the travel style analysis, most Chinese travel by coach (48% in 2001). The average travel distance by coach is 666 km, which is less than the average across all coach tourists in New Zealand (756 km in 2001, Becken & Cavanagh, 2003), although it has to be remembered that this distance is travelled within a short time of about one week. Air travel is the third most popular transport mode, although the proportion of Chinese visitors travelling by domestic air decreased between 1999 and 2001 by 37%. Travel distances by air are typically larger compared with other transport modes, although the average distance has decreased between 1999 and 2001. This has implications for energy use, because air travel is the most energy intensive form of transport. As compared to other international visitors to New Zealand the range of transport modes used by Chinese tourists is limited.

The same applies to accommodation: most tourists stay either at hotels or in private homes. In 2001, for example, 72% of Chinese tourists stayed at least once in a hotel, where they spent on average 4.7 nights. Motels have gained some popularity over latter years, but other categories remain marginal.

Table 3 Travel choices made by Chinese visitors in 1999, 2000 and 2001

| | 1999 | | 2000 | | 2001 | |
|---|---|---|---|---|---|---|
| Travel distance | Frequency (%) | Distance (km) | Frequency (%) | Distance (km) | Frequency (%) | Distance (km) |
| Coach | 47.9 | 648 | 50.9 | 689 | 48.2 | 666 |
| Scheduled bus | 40.8 | 123 | 36.8 | 130 | 39.7 | 91 |
| Domestic air | 36.6 | 1244 | 24.5 | 1275 | 23.1 | 934 |
| Private car | 7.0 | 454 | 1.5 | 411 | 9.5 | 678 |
| Rental car | 5.6 | 1102 | 6.6 | 1118 | 7.5 | 1006 |
| Train | - | - | 2.8 | 280 | - | - |
| Nights | Frequency (%) | Number of nights | Frequency (%) | Number of nights | Frequency (%) | Number of nights |
| Hotel | 80.3 | 4.1 | 78.3 | 4.3 | 72.4 | 4.7 |
| Private home | 19.7 | 42.5 | 22.6 | 41.7 | 27.1 | 89.8 |
| Motel | 4.2 | 27.0 | 12.3 | 6.9 | 9.0 | 8.1 |
| B&B | 4.2 | 5.7 | 4.7 | 87.6 | - | - |
| Backpacker | - | - | 1.8 | 4.0 | 1.5 | 105.0 |
| Camping | - | - | - | - | 1.5 | 5.7 |

## 6. Expected development of the market

The WTO (2003) predicts that disposable incomes will increase in China, and so will the demand for travel. The market of the main generating areas – Beijing, Guandong Province and Shanghai – will mature, while other areas will also become sources for outbound tourism. The maturing will result from increased travel experience and better language abilities, mainly by the younger generation. The government plans to introduce a ‘holiday with pay system’ in 2001–2005, which will allow Chinese to take leave for two weeks a year in addition to the public holidays (WTO, 2003). As a result, Chinese will be able to spend more time overseas and increasingly divert from the rushed travel during the golden weeks.

Tourism New Zealand reports a similar trend of Chinese increasingly avoiding the golden weeks (among others because prices are exorbitant during these times). As a response, TNZ promotes visitation in the low season and longer stays in New Zealand. A recent campaign by TNZ and GZL International Travel Services, for example, promotes an eight-day self-drive trip (in convoy) to New Zealand as a single destination, not combined with Australia. There are already a number of FIT Chinese, who get their itineraries designed by a travel agency in China and then make up a ‘group’ on their own with a designated ‘tour guide’ (WTO, 2003). The saying ‘*the poor go group travelling and the rich go holidaying*’ clearly demonstrates the attitudes of Chinese outbound tourists in this regard. There is some potential to speed up the process of maturing from group tour travel to FIT travel, for example by educating and familiarising overseas wholesalers and retailers (comm. I. Bougen).

Currently, there is a perception by New Zealand tourism stakeholders that the Chinese market is low yield (comm. S. Murray, R. Osborne), and for this reason is not marketed as heavily as other markets (comm. V. Schwass, D. Barnes). It is questioned whether the current structure of the Chinese holiday market meets the strategic goal of increasing the share of ‘interactive travellers’, who are experience-focused, interested in the local culture and environment, and aware of sustainability issues. Some stakeholders believe that the Chinese group tours need to be well managed and channelled to avoid negative impacts (comm. D. Barnes,). Currently, a large number of Chinese tours only travel from Auckland to Rotorua and back, but it can be expected that the Chinese pattern will follow the example of Korean coach tours, which now travel more widely and go as far south as Milford Sound (comm D. Hawkey). Such a development would have important implications for resource consumption, as the one-week tour from Auckland to Rotorua, and Milford Sound to Christchurch (the Golden Triangle) is the most extreme example of an energy-intensive itinerary.

There is some belief that New Zealand is not sold at its optimum to the Chinese market, because some large companies took possession of a very specific segment (low-quality coach tours), which does not provide customer satisfaction and creates negative word-of-mouth (comm. S. Murray, V. Schwass). A similar situation is described for Australian, where Chinese travel agencies negotiate very low prices with Australian suppliers, which results in tours of a poor quality and service. Moreover, little variety is given in current products, limiting potential Chinese tourists’ choices (Wen Pan & Laws, 2001). In this context, TNZ currently is undertaking a study to assess the proportion of ‘interactive travellers’ in the Asian, including Chinese, market. Given there is potential for such interactive segments, new products would be needed to change the current market set-up. The WTO (2003) also suggests that – in the Australian case – further growth of the Chinese market will not be a result of discounting but rather from the development of new products.

Gaining better control over the Asian discount (Chen, 2002) will be important for ensuring a sustainable Chinese market. The China National Tourism Administration supports this by reducing the number of under-cost tours and formalising commission not to exceed 25% of agents' revenue. New products developed in New Zealand for the Chinese holiday visitors could, for example, comprise Maori cultural products (Ryan & Mo, 2001). In addition, new products should ensure that sufficient time for relaxation is provided. Overall, it appears that the trends discussed above could lead to more flexible, less rushed and more relaxed, longer and higher yield forms of Chinese holiday tourism. Caution is advised that only development of group tour travel in terms of increasing travel distances not be without an accordingly increased length of stay.

## 7. Conclusion

Although the number of Chinese visitors to New Zealand is increasing at a very fast rate, it is important to bear in mind that only a minority of visitors come for a holiday. The education segment is one that certainly deserves further attention. Business travel and conference tourism are two other segments that are potentially high yield, and offer the opportunity to promote sustainable and regional products as an add-on to the business/conference purpose. About half the Chinese visitors – both holiday and business – are coach tourists, although this share is declining, at the expense of independent travel (in its early stages) and VFR tourism. About one quarter of Chinese tourists never leave their gateway of arrival, and little is known about what they do during their stay in New Zealand.

Currently, the Chinese holiday market is characterised by a very short stay and relatively short travel distances in total and per day. This results from the typical itinerary that is often limited to visiting Rotorua as a side trip from Auckland. Future development by adding Milford Sound to this itinerary would result in a dramatic increase in travel distance and energy consumption. The trend between 1999 and 2001 indicates a decrease in both travel distance and use of domestic air. The reason for this is unclear, but in terms of resource use and travel itineraries this trend should be observed further.

There is potential for the Chinese market – instead of developing towards resource-intensive low-yield group tourism – to increase its share of FIT travellers, who have more time and who seek greater involvement and a better experience. This would require a coordinated approach through marketing, product development and overseas trade education. The building of strong relationships with Chinese travel agencies is essential for promoting new products. A key element in this process it to build ‘guanxi’, which describes social networks and connections, or ‘friendships with implications’ (Wen Pan & Laws, 2001).

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