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China Survey – Tourism to Australia in relation to seafood / abalone consumption

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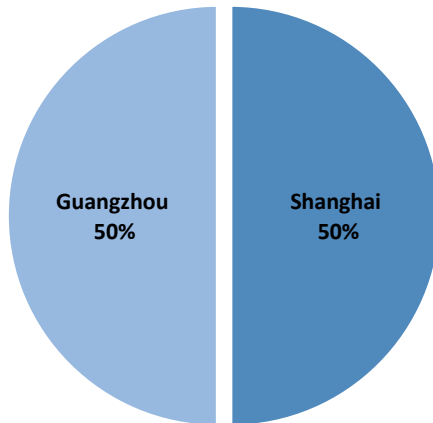
SURVEY ANALYSIS


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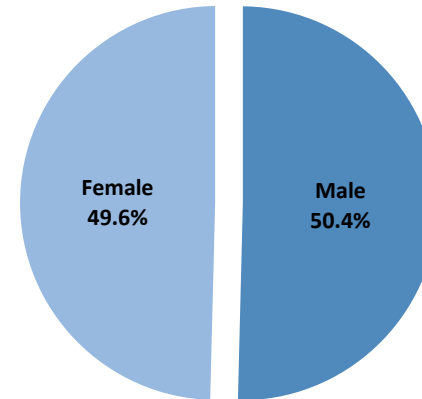


Survey background (1/2)

Survey background: geographic distribution
(n=500)



Survey background: gender distribution
(n=500)

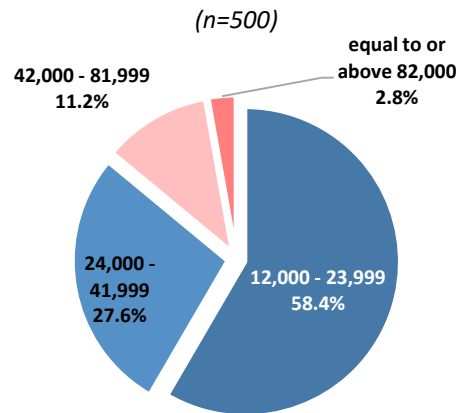


- 500 respondents, equally split between Guangzhou and Shanghai.
- Gender distribution representative of China's demographics.

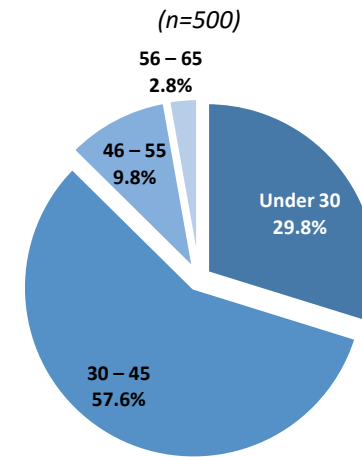


Survey background (2/2)

Survey background: income distribution
(RMB/month)



Survey background: age distribution

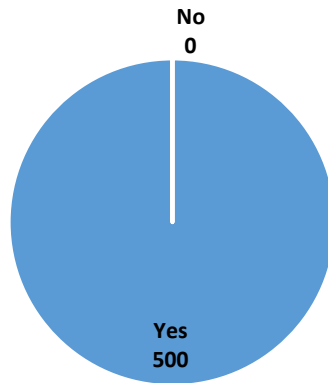


- Survey focusing on the Chinese population that is able to travel: China's urban middle-class (and above) with household incomes of CNY12,000 and above.
- Age distribution also focusing on the "typical" middle-class urban household: post-80's / post-90's generation that are open and actually capable of travelling to foreign countries.

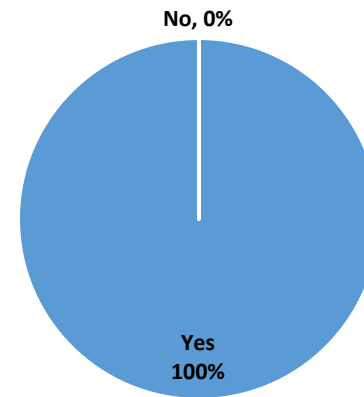


Tourism to Australia and interest in tasting seafood

Interest in visiting Australia in the next two
years
(n=500)



Interest in tasting Australian seafood
(n=500)



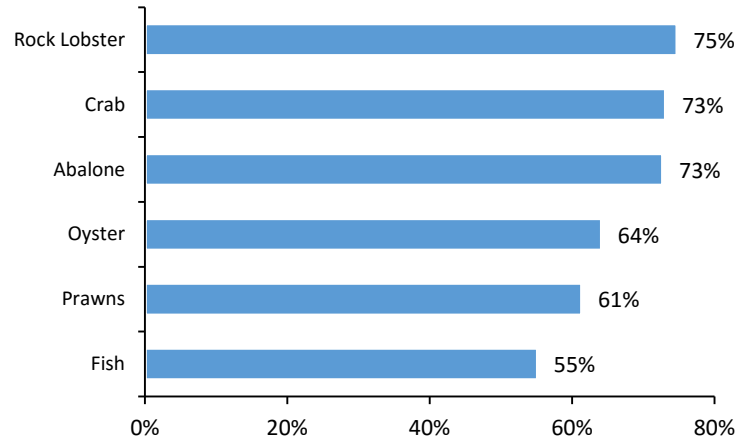
- The survey focusing on respondents with interest in visiting Australia, 100% of the respondents for this survey are interest in visiting Australia in the next 2 years.
- All potential “Australia tourists” are actually interested in tasting and experiencing Australian seafood during their visit.



Australian seafood consumers are interested in

Interest in Australian seafood

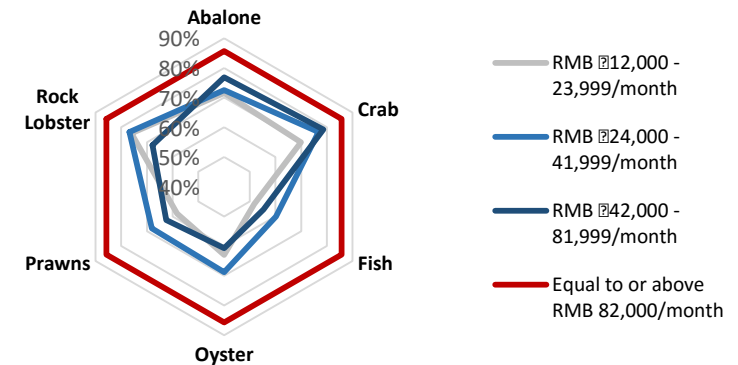
(n=500)



Interest in Australian seafood by income

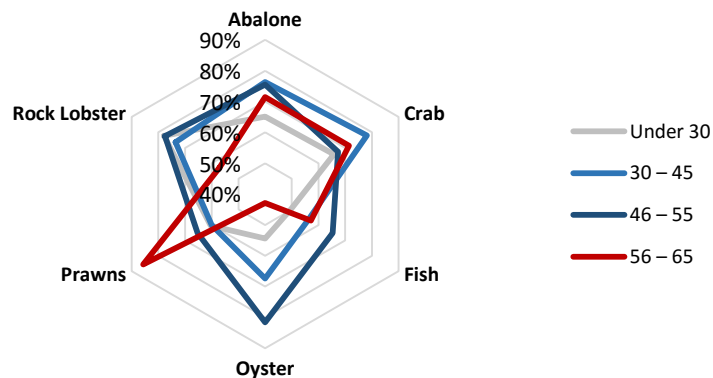
range

(n=500)



Interest in Australian seafood by age range

(n=500)



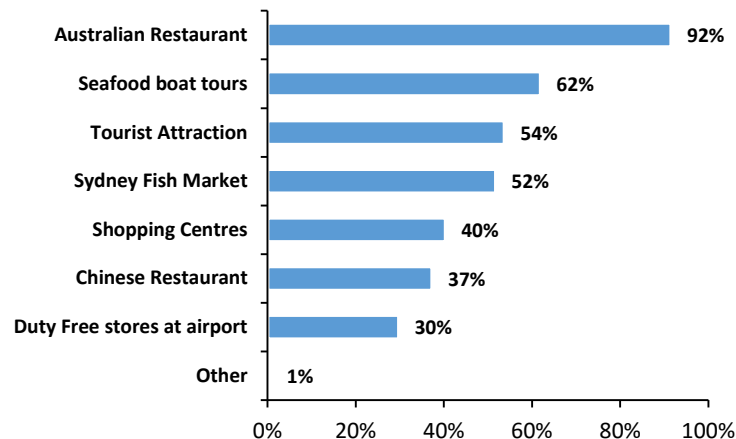
- Respondents for this survey have highest interest in Rock Lobster, crab and abalone (top left chart). They have the least interest in fish.
- The mass-middle class households (12k-24k/month) have a stronger interest in the Rock Lobster, and secondary interest in Oyster and Crab. Upper middle- and upper-class have a higher interest in most products, with emphasis on Crab, Rock Lobster, Abalone and Oyster.
- For consumers under 55 years old, the older they are, the higher interest they have for seafood. Elder people (aged between 56 and 65) show less interest in seafood, but are very interested in prawns (bottom left chart).
- Abalone seems to be especially appreciated by 30-55 upper middle / upper-class respondents.



Consumers' preferences on "how to experience" Australian seafood

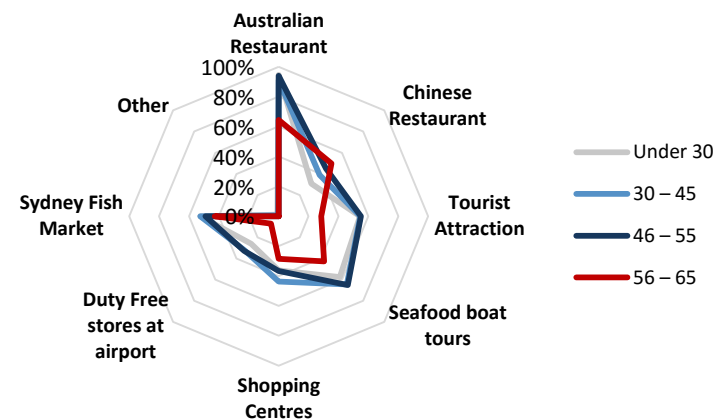
Preferred location taste Australian seafood

(n=500)



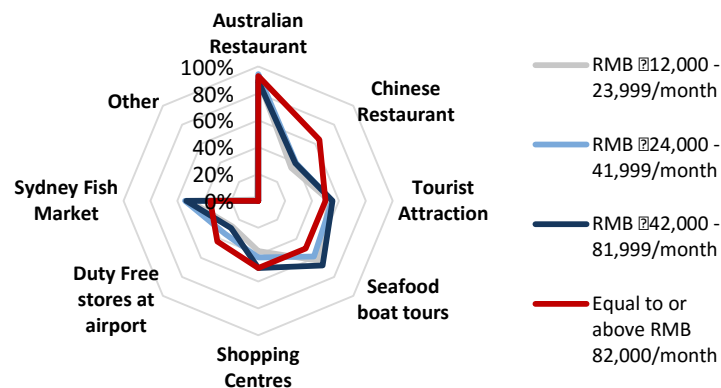
Preferred locations to taste Australian seafood by age range

(n=500)



Preferred locations to taste Australian seafood by income range

(n=500)

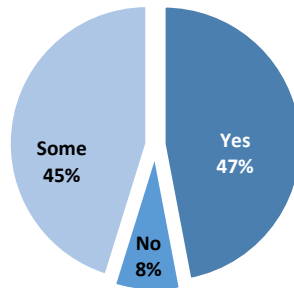


- Most respondents (92%) are interested in tasting seafood in an Australian restaurant. Other popular locations include seafood boat tour, tourist attraction and Sydney Fish Market.
- While all respondents show less interest in tasting seafood in Chinese restaurants -- only 37% for the whole panel of respondents, respondents with highest income (above 82,000), as well as elder people aged between 56 and 65 show greater interest in Chinese restaurant compared with others (shown in red lines).

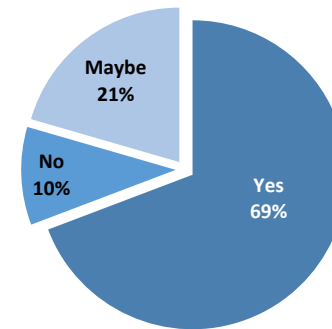


Knowledge about Australian seafood and interest to learn more

Whether people have a lot of knowledge about what Australian seafood is available for tasting or purchasing
(n=500)



If no, whether they are interested in knowing more about Australian seafood
(n=39)

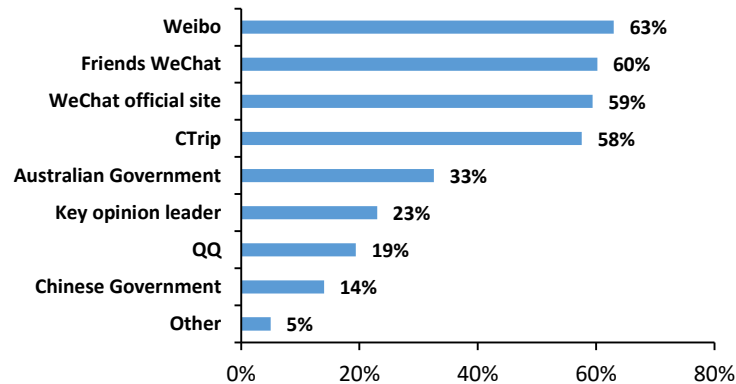


- Most respondents for this survey think they have some (45%) or a lot of (47%) knowledge about Australian seafood.
- For those who do not (39 respondents for this survey), most of them want to get more information about it.

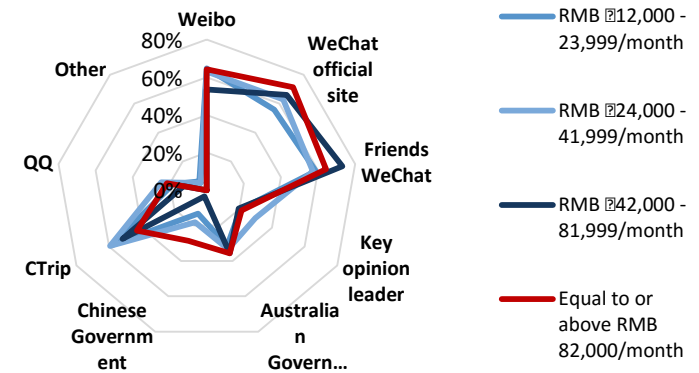


Consumers' preferred channels to get information on Australian seafood

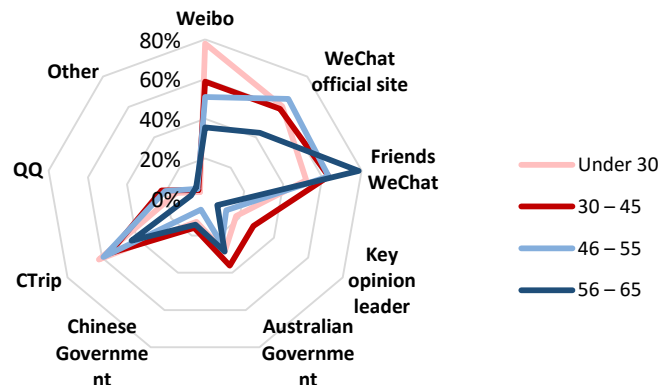
Channels to gather information on Australian seafood
(n=500)



Channels to gather information on Australian seafood by income range
(n=500)



Channels to gather information on Australian seafood by age range
(n=500)



Analysis

- The favorite channel for respondents to get information on where to buy, taste and experience Australian seafood is social media: Weibo and WeChat. CTrip is also a preferred channel following social media.
- Weibo is used most for young people to get information, whereas elder people (56-65) are mostly informed about Australian seafood by their friends on WeChat (bottom left chart). This is consistent with Chinese people's preference towards social media – younger people like to use Weibo and older people use WeChat more often.
- The younger the respondents and the less income they earn, the more likely they use CTrip to gather information on seafood.

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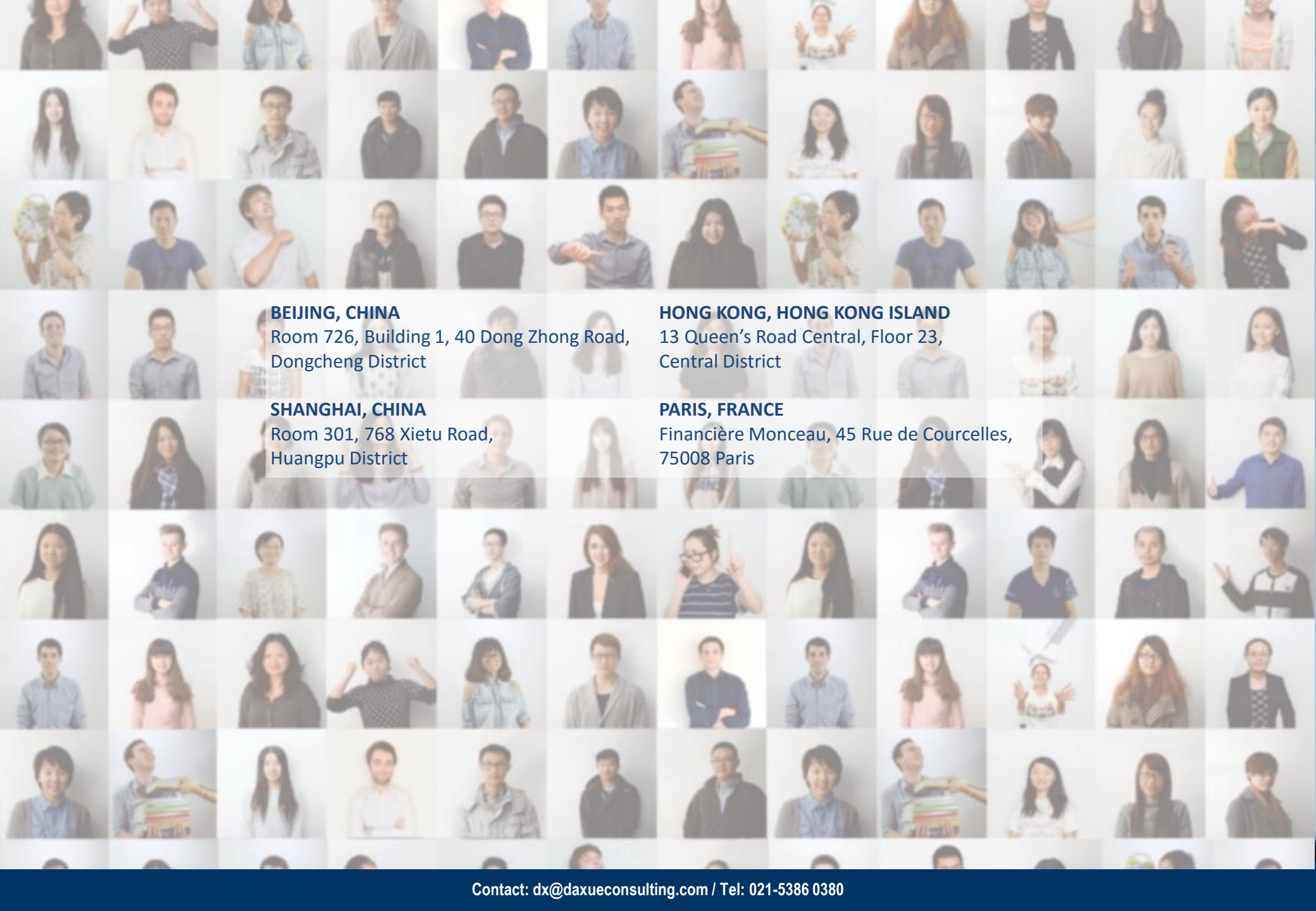
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