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Project 4: L.E.K How the China tourism boom is transforming Australia

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L.E.K

艾意凯咨询

Enter the dragon: How the China tourism boom is transforming Australia

与龙共舞：中国旅游热正如何改变澳大利亚

Australia China Business Council

澳大利亚中国工商业委员会

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Jacobs Creek, Barossa Valley, SA

Credit: Tourism Australia

Photographer: Adrian Brown

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图片来源：澳大利亚旅游局

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Cover: Twelve Apostles, Great Ocean Road, Vic.

Credit: Tourism Australia

Photographer: Richard Powers

封面：十二门徒，大洋路，维多利亚州

图片来源：澳大利亚旅游局

摄影师：理查德·鲍尔斯（Richard Powers）

## Page 1

### Message from John Brumby

来自约翰·布伦比（John Brumby）的一封信

### Chairman, Australia China Business Council

澳大利亚中国工商业委员会主席

“I am delighted to support this important research paper from L.E.K. Consulting on the broader impacts of Chinese tourism for the Australian economy. The report offers fresh insights into the nature of Australia’s emerging China trade, and the linkages between tourism and sectors like education, real-estate investment, business investment and the export of Australian produce. Better understanding these linkages will be a key driver of success in Australia’s trade relationship with China, and makes this paper important reading for government and business leaders. I congratulate L.E.K. on this distinctive and insightful research initiative.”

“艾意凯咨询公司的这份重要研究着眼于中国旅游业对澳大利亚经济更广泛的影响，而我很荣幸可以为此提供支持。该研究为以下内容提供了全新的见解：中国贸易在澳兴起的本质；旅游与其他部门间的联系，如教育、房产投资、商业投资以及澳大利亚产品出口。更好地理解这些联系将成为澳中贸易关系成功的关键因素，也将使本文成为政府和企业领导人的重要读物。我对艾意凯咨询这项与众不同、见微知著的研究提案表示祝贺。”

## About the author

### 关于作者

Simon Barrett is the chairman and a senior partner of L.E.K. Australia with over 25 years of experience advising governments and the private sector on transport, tourism and economic development. He was previously the regional head of L.E.K. in Asia and has worked intensively across the Australia–Asia region and Europe throughout his career.

西蒙·巴雷特（Simon Barrett）是艾意凯咨询澳大利亚办事处的主席兼资深合伙人。他为政府和私营机构就交通、旅游以及经济发展方面提供建议，已有超过25年的经验。此前，他曾是艾意凯咨询在亚洲地区的区域负责人。在整个职业生涯中，他一直致力于研究澳亚及欧洲地区。

Simon's primary focus is on transport and tourism; he develops influential strategy for aviation, airports, passenger transport and related tourism operators. He has deep expertise leading public policy, long-term planning, commercial strategy, M&A, organisational design and operational performance improvement projects. Simon has also led national and state level reforms over the last 15 years.

西蒙的研究重点是交通和旅游业。他为航空、机场、客运和相关旅游经营者制定的战略，影响深远。在指导公共政策、长远规划、商业战略、企业并购、组

织设计及运营绩效改进项目方面，他游刃有余。在过去的 15 年中，西蒙也曾领导过国家级和州级的改革。

Simon is a member of the Transport and Tourism Forum's advisory board, and chairman of its passenger transport panel. He has a BSc from Melbourne University and a PhD from Cambridge, where he was a Cambridge Australia Trust scholar.

西蒙是澳大利亚旅游和交通论坛（Transport and Tourism Forum）顾问委员会的成员，也是其客运委员会的主席。他拥有墨尔本大学理学学士学位和剑桥大学博士学位，也曾是剑桥大学澳大利亚基金会的奖学金获得者。

We acknowledge the support of the Australia China Business Council

我们对澳大利亚中国工商业委员会的支持表示感谢。

Australia China Business Council

澳大利亚中国工商业委员会

## Page 2

### Overview

#### 概览

Chinese tourism represents a large and growing opportunity for Australia.

Understanding how the experience of Chinese tourists translates into broader economic opportunities for Australian offerings and exports is key to unlocking the full value of the Chinese travel and tourism market.

对澳大利亚来说，中国旅游业是一个巨大且持续增长的机遇。了解中国旅客如何能为澳大利亚的供应和出口提供更广阔的经济机遇，这对于释放中国旅客和旅游市场的整体价值至关重要。

46% of Chinese visitors to Australia are repeat visitors.

在来澳的中国旅客中，46%是回访者。

Chinese visitors to Australia 2005-15 (millions)	2005-2015 年，中国赴澳大利亚的旅 游人数（按百万计）
Millions 1.0	百万 1.0
1 M	1 百万
19% annual growth of Chinese visitors to Australia 2011-2015	2011-2015 年，中国赴澳的旅客人数 年均增长率为 19%

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6% growth p.a.	年均增长率为 6%
19% growth p.a.	年均增长率为 19%

Chinese visitors to Australia by category 2005-14 (percent)	2005-2014 年访澳的中国旅客类型 (按百分比计)
Other	其他
Employment	就业
Business	商务
Education	教育
Visiting friends/relatives	走亲访友
Holiday	度假

Illustrative potential value of Chinese visitors' economic engagement with Australia, based on stated intentions, 2015 and 2025	根据 2015 年及 2025 年中国旅客的公开意向, 说明中国旅客参与澳大利亚经济的潜在价值
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Percentage of visitors who have pursued or "would probably or definitely" pursue further activity with Australia	“已经”、“可能或绝对”会与澳大利亚进行进一步交往的旅客的百分比
First visit	首次到访



Repeat visit	再次到访
Tertiary education	高等教育
Real-estate investment	房产投资
Business investment	商业投资
Australian goods and services in China	澳大利亚在华的商品和服务

\*Source: Tourism research Australia international visitor survey: AusTrade; L.E.K.

research.

\*来源：澳大利亚旅游调查局——国际旅客调查；澳大利亚贸易委员会；艾意凯  
咨询

### Page 3

20% of visitors say they already have Australian permanent residence (PR), even though they live in China.

20%的旅客表明，尽管他们居住在中国，但他们已拥有澳大利亚永久居留权（PR）。

50% of visitors say they "probably or definitely will pursue deeper economic engagement."

50%的旅客表示，他们“可能或一定会寻求更深层的经济参与”。

85% of these visitors said that their visit was "very influential" in shaping their attitude toward future economic engagement.

85%的旅客表示，他们的到访对其未来经济参与态度的形成“影响深远”。

Visitors are more likely to buy Australian products and services after they return to China, with their average annual spend rising by 40% after their trip.

旅客在回国后购买澳大利亚产品和服务的可能性增加，年均消费额在旅行后增加 40%。

Average spend per visitor by country of origin 2014 (A\$)	2014 年，按来源国划分的每位旅客的平均消费额（澳元）
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\$5,300 Average spend (includes short-term education)	平均消费 5300 澳元（包括短期教育）
\$3,800 Average spend (when excluding short-term education)	平均消费 3800 澳元（不包括短期教育）
\$5,300	5300 澳元

\$ value in 2015 (1m visitors)	2015 年的经济价值（100 万旅客）
5bn	50 亿
4bn	40 亿
74bn	740 亿
194bn	1940 亿
408bn	4080 亿
1bn	10 亿
\$ value in 2025 (2m visitors)	2025 年的经济价值（200 万旅客）
10bn	100 亿
8bn	80 亿
148bn	1480 亿
388bn	3880 亿
816bn	8160 亿
2bn	20 亿

In tourism, Australia only has a 1% share of Chinese travelers, but it holds an outsized share in a number of other areas.

旅游方面，澳大利亚仅占中国旅客的 1% 的份额，但与其他一些地区相比，占比巨大。

In wine, Australia has a 14% share of Chinese imports by volume but a 23% share by value, indicating premium positioning.

葡萄酒方面，澳大利亚占中国进口量的 14%，但却占经济价值的 23%，这表明澳大利亚处于领先地位。

In beef, Australia has a 40% share of the Chinese import market, worth \$750m per year.

牛肉方面，澳大利亚占中国进口量的 40%，每年价值 7.5 亿澳元。

In vitamins and supplements, Australian firms have already reached \$230m per year in sales to China, with Blackmores alone reaching \$100m in 2015.

维生素和保健品方面，澳大利亚公司每年在中国的销售额已达 2.3 亿澳元，2015 年仅澳佳宝（Blackmores）的销售额就达到 1 亿澳元。

In education, Australia has an 11.5% share of all Chinese overseas students. It takes

third place behind the USA and the UK, which both have significantly larger populations.

在教育方面，在澳的中国留学生占有所有中国留学生的 11.5%，仅次于美国和英国这两个留学大国。

## Page 4

### Executive summary

### 执行摘要

China is now Australia's largest trading partner.<sup>1</sup> Two-way trade between the two countries amounted to \$150 billion in 2014-15 and accounted for the largest single-country share of Australia's exports (28%) and imports (17%).<sup>2</sup>

如今，中国是澳大利亚最大的贸易伙伴。<sup>1</sup>2014 至 2015，两国双向贸易额达 1500 亿澳元，中国成为澳大利亚出口（28%）和进口（17%）最大的国家。<sup>2</sup>

In the aftermath of the commodities boom, Australian exports to China are now becoming more diverse. There is strong growth in the export of services such as education and tourism, and growing Chinese investment in Australian real estate, infrastructure and different types of businesses.

在商品热潮之后，澳大利亚对中国的出口如今变得更加多样化，教育和旅游等服务类的出口增长强劲。中国对澳洲房产、基础设施和各类企业的投资也不断增加。

Growth in tourism has been particularly strong. Visitor arrivals from China hit 1 million per year for the first time in 2015, on the back of 19% annual growth between 2010 and 2015.<sup>3</sup>

旅游业的增长尤为强劲。2010 年至 2015 年，中国赴澳旅客的年增长率为 19%；2015 年，中国每年赴澳旅客首次突破一百万。<sup>3</sup>

The recently signed China-Australia Free Trade Agreement (ChAFTA) is likely to further accelerate trade growth, with tariff reductions and other changes offering considerable potential for sectors including agriculture and health to benefit from reduced trade barriers. Australia already has an outsized market share in some specific imports to China, including wine, beef and vitamins.

近期签署的《中澳自由贸易协定》（ChAFTA）可能会进一步加速贸易增长。协定中包含的关税削减及其他变化为减少贸易壁垒提供了巨大可能，农业和健康在内的各部门也将受益于此。澳大利亚在中国的一些特定进口产品中已占有巨大的市场份额，其中包括葡萄酒、牛肉及维生素。

An emerging risk for Australian policymakers and businesses is that they could fail to adequately take into account the very strong linkages between some of these trade sectors. There is a danger that if each industry views its trade with China in isolation, collectively they could fail to capitalise on the full business opportunity and on potential synergies.

无法充分考虑各贸易部门间的紧密联系是澳大利亚政策制定者及企业所面临的新风险。如果各行业在与中国的贸易中只想独善其身，则可能都无法充分利用商业机会和潜在的协同效应。

Other countries that do a better job of taking a holistic approach to China trade would then gain a greater share of business with the world's largest economy.

与中国全面贸易做得更好的国家将与全球最大经济体分享更大的业务。

By undertaking a targeted survey of Chinese residents who have visited Australia in the past three years, L.E.K. Consulting has established that there are already very powerful links between Chinese tourism and other sectors of the Australian economy, which are not yet well understood.

通过对过去三年访问澳大利亚的中国居民进行有针对性的调查，艾意凯咨询已证实，中国旅游业与澳大利亚其他经济部门之间已有强大联系，只是还没有为人所知。

Key findings include:

- 46% of Chinese visitors to Australia are repeat visitors.
- A significant proportion of visitors—20% of our survey sample—already say they have Australian permanent residence (PR), even though they live in China. This group has an especially high propensity to participate in education in Australia, and to invest in real estate and businesses.
- A large proportion of all Chinese visitors say that they "probably" or "definitely" will pursue deeper economic engagement with Australia through either tertiary education



(64%), real-estate investment (43%) or business investment (38%).

主要发现包括:

- 中国赴澳的旅客中，46%是回访者。
- 我们的调查样本中有20%的旅客表示，尽管他们居住在中国，但他们已有澳大利亚永久居留权。这一组受访者极有倾向参与澳大利亚教育并投资房产和商业。
- 大部分中国旅客表示，他们“可能”或“绝对”将通过高等教育（64%），房产投资（43%）或商业投资（38%），寻求与澳大利亚更深层的经济交往。

## Page 5

\$150 billion in two-way trade

46% of Chinese visitors to Australia are repeat visitors

双向贸易额达 1500 亿澳元

中国赴澳旅客中有 46% 为回访者

- Of those who "probably or definitely" intend to engage further, 85% said that their visit to Australia was "influential" or "very influential" in their decision-making.
- Visitors are more likely to buy Australian products and services after they return to China, with their average annual spend rising by 40% after their trip.
- Given that Chinese tourism numbers are expected to continue to grow strongly, projections see at least 2 million Chinese visitors to Australia each year by 2025. Their visits will provide an extraordinary opportunity to showcase Australia's products and services, which will help accelerate overall trade growth if properly utilised. If even a small proportion of the visitors who say they will pursue deeper economic engagement in Australia follow through on their intentions, it will be worth many tens or even hundreds of billions of dollars to the Australian economy over time.
- “可能或绝对” 会加深与澳大利亚交往的人中，85% 的人表示，他们到访澳大利亚的体验在决策过程中“有影响力”或“非常有影响力”。  
旅客返回中国后更有可能购买澳大利亚的产品和服务，年平均消费额在旅行后

上涨40%。

- 鉴于中国旅游数据有望继续强劲增长，预计到2025年，每年至少有200万中国旅客前往澳大利亚。他们的访问将为澳大利亚产品和服务的展示提供一个绝佳的机会。如果对此适当利用，将有助于加速整体贸易增长。即使在表示将更深度地参与澳大利亚经济的旅客中，只有一小部分按照其意图行事，但日积月累，这对澳大利亚经济来说也将价值数十亿甚至数千亿澳元。

In light of this, government and businesses need to:

- invest more in ensuring Australia can continue to attract Chinese tourists
- devote attention to giving Chinese tourists a positive experience by improving visa processes, airports, hotels, public transport and so on
- capitalise on the promotion opportunities these visits create for other sectors, such as education, investment, and the export of goods and services
- ensure that institutions, regulatory frameworks and infrastructure are adequately prepared for the high demand that is anticipated

鉴于此，政府和企业需要：

- 加大投资，确保澳大利亚能够继续吸引中国旅客
- 致力于改善签证流程，机场，酒店，公共交通等，为中国旅客提供良好体验
- 利用这些访问为其他部门（如教育、投资和商品服务出口）创造发展机会
- 确保机构、监管框架和基础设施已为预期的高需求做好了充分准备

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Booming visitor numbers herald an economic windfall for Australia

旅客人数激增预示着澳大利亚的经济暴利

CHINA

中国

## Page 7

L.E.K. Consulting recently undertook a survey of Chinese visitors to Australia, with the aim of quantifying the wider potential impact of their tourism on the Australian economy in the medium to long term.

近日，艾意凯咨询对访澳的中国旅客进行了一项调查，目的是量化其旅游业在中长期内对澳大利亚经济的潜在影响。

The results of this research have borne out the hypothesis that inspired it: that the immediate economic benefit of Chinese tourism, in terms of revenue for tourism-related businesses and retailers popular with visitors, is in fact only the first sign of a massive trade opportunity for Australia. The evidence we gathered supports the further observation that present trends in Chinese tourism have significant implications for business and for policymakers. Put simply, Australian government and industry need to change their view of tourism, and particularly Chinese tourism, in accordance with the true magnitude of the opportunity.

这项研究的结果证实了这样一个假设：对澳大利亚来说，从中国旅游业——即旅游相关产业和受旅客喜爱的零售商处获得的直接经济效益，实际上只是巨大贸易机会的第一个信号。我们收集的证据支持了进一步的发现，即中国旅游业目前的趋势对商业和决策者有重大影响。简而言之，澳大利亚政府和行业需要根据这次机会的实际情况，改变他们对旅游业的看法，特别是对中国旅游业。

## The nature of Australia-China trade is changing

澳中贸易的本质正悄然改变

Australia has long been known as an exporter of natural resources and agricultural commodities. Iron ore, coal, natural gas, gold and beef are major export earners, joined by education and tourism in the list of Australia's top 10 export industries (Table 1).

澳大利亚长期以来一直被誉为自然资源和农产品的出口国。铁矿石，煤炭，天然气，黄金和牛肉是主要的出口收入来源。在澳大利亚出口行业的十强名单中，现加入了教育和旅游两项（表 1）。

Of this trade, a significant amount is dominated by China, now Australia's largest trading partner. The two countries exchanged two-way trade worth \$150 billion in 2014-15 (Table 2).<sup>5</sup> China accounts for 28% of Australian exports and 17% of Australian imports-the largest shares of any country. The 2014 Australia- China Trade Report, sponsored by the National Australia Bank and issued by the Australia China Business Council, estimated that 200,000 Australian jobs were linked to trade with China in 2011,<sup>6</sup> a figure that will only have grown in the past five years.

在这一贸易中，中国是澳大利亚最大的贸易伙伴，占据了重要的份额。2014 至 2015 年，两国进行的双向贸易价值 1500 亿澳元（表 2）。<sup>5</sup> 中国占澳大利亚出口的 28%，进口的 17%，在所有国家中占最大份额。《2014 澳大利亚-中国贸

易报告》（The 2014 Australia- China Trade Report）由澳大利亚国民银行（NAB）赞助并由澳大利亚中国工商委员会（ACBC）发布。报告曾预计，2011 年，澳大利亚 20 万的就业机会将与中国贸易相连，<sup>6</sup>这一数字在 2011 至 2016 这五年间将只增不减。

The Australia-China Trade Report also observed that:

The engine of growth is shifting from resources to other sectors and industries.

Australian non-resources exports to China are growing in agriculture, manufacture and services. Twenty percent of Australian non-resources exports go into Chinese final consumer markets... Chinese demand for premium and high quality Australian food products, such as beef and meats, has increased dramatically in the last two years.<sup>7</sup>

《2014 澳大利亚-中国贸易报告》还指出：

增长的动力正从自然资源转向其他部门和行业。澳大利亚对华的非自然资源出口在农业、制造业和服务业中不断增长。澳大利亚 20%的非自然资源出口进入中国终端消费市场.....过去两年，中国对质量上乘的澳大利亚食品（如牛肉和肉类）的需求急剧增加。<sup>7</sup>

This report focuses on the role Chinese tourist visits to Australia are playing in this evolution of the Australia-China trade relationship.

本报告的重点是中国旅客访澳在澳中贸易关系中所发挥的作用。

China and Australia exchanged two-way trade worth \$150 billion in 2014-15

2014 至 2015 年，中澳两国进行的双向贸易价值 1500 亿澳元。

China accounts for 28% of Australian exports and 17% of Australian imports: the largest shares of any country.

中国占澳大利亚出口的 28%，进口的 17%，在所有国家中占最大份额。

AUSTRALIA

澳大利亚



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Table 1: Top 10 Australian export industries (Source: DFAT, “Australia’s Trade”)	表 1： 澳大利亚十大出口行业（来源： 澳大利亚外交事务与贸易部（DFAT）， “澳大利亚贸易” ）
2014-15 (A\$ billion)	2014-15（百万澳元）
5-year growth (% p.a.)	五年增长率（%每年）
Rank	排行
Commodity	商品
Iron ores & concentrates	铁矿和精矿
Coal	煤炭
Education (incl. related travel services) <sup>4</sup>	教育（包括相关的旅游服务）
Natural gas	天然气
Personal travel (excl. education services)	私人旅行（不包括教育服务）
Gold	黄金
Beef	牛肉
Crude petroleum	原油
Aluminum ores & conc (incl. alumina)	铝矿和精矿（包括氧化铝）
Wheat	小麦

Table 2: Australia's top two-way trading partners (Source: DFAT, "Australia's Trade")	表 2: 澳大利亚的高级双向贸易伙伴 (来源: 澳大利亚外交事务与贸易部 (DFAT), "澳大利亚贸易")
2014-15 (A\$ billion)	2014-15 (百万澳元)
5-year growth (% p.a.)	五年增长率 (%每年)
Rank	排行
China	中国
Japan	日本
U.S.A.	美国
South Korea	韩国
Singapore	新加坡
NZ	新西兰
Great Britain	英国
Thailand	泰国
Malaysia	马来西亚
India	印度

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Outbound tourism is growing rapidly

出境旅游迅速增长

Driven by rising levels of household income, Chinese overseas tourism is surging. In 2015, Chinese residents made an estimated 120 million visits to foreign destinations.<sup>8</sup>

随着家庭收入水平的提高，中国境外旅游正在飙升。2015年，中国居民预计到访国外目的地 1.2 亿次。<sup>8</sup>

As part of this phenomenon, Chinese visits to Australia have been growing incredibly strongly over the past decade. Though this may seem an obvious trend, many may not yet fully appreciate the extraordinary speed at which it is occurring. From 2005 to 2010, Australia saw steady growth in Chinese visits of around 6% per year.<sup>9</sup> But between 2010 and 2015, the rate of increase has been 19% per year. Australia reached 1 million Chinese visitors per year for the first time in November 2015.

作为这种现象的一部分，过去十年来，中国旅客对澳大利亚的访问急速增长。虽然这看起来是一个明显的趋势，但许多人可能还没有完全理解它正在发生的超速度。从 2005 年到 2010 年，澳大利亚的中国访问量稳步增长，每年约为 6%。<sup>9</sup>但是，2010 年至 2015 年间，每年的增长率为 19%。2015 年 11 月，澳大利亚首次达到每年 100 万的中国旅客量。

This growth is expected to continue, though perhaps at a slightly slower pace.

Australia is only just holding its share of total Chinese outbound travel at around 1%.

However, its share of Chinese long-haul travel has actually fallen slightly, from 7% in 2009 to 6% in 2014. Still, we can reasonably expect Australia to hit 2 million Chinese visitors per year by 2025.

预计这一增长将继续，但速度可能会放缓。澳大利亚市场仅占有中国出境旅客人数的 1%。但是，中国旅客长途旅行的总量实际上已从 2009 年的 7% 略微下降到 2014 年的 6%。尽管如此，我们仍然可以合理预计，到 2025 年，澳大利亚每年将有 200 万中国旅客。

The growth in Chinese visits to Australia is itself a great story and opportunity, but it also has much broader implications.

中国访澳的旅游业增长，其本身是一个绝佳的机会，但它也有更广泛的影响。

Figure 1: Chinese visitors to Australia 2005-15	图 1: 2005 至 2015 年，中国访澳旅 客人数
Millions	百万
19% growth p.a.	年均增长率为 19%
1m	1 百万
6% growth p.a.	年均增长率为 6%

Education and tourism are in the top 5 Australian export sectors

教育和旅游在澳大利亚出口行业排名前五

Just one of the well-known but unexpected effects of increased Chinese tourism is that Australian businesses manufacturing vitamins, minerals and other dietary supplements have seen a major upswing in sales to Chinese customers. While some of these sales are to intermediaries who make a business of buying such products in Australia and shipping them to China, many are simply to tourists "clearing the shelves" while travelling.

中国旅游业增长所带来的一个众所周知但意想不到的影响是，澳大利亚生产维生素、矿物质和其他膳食补充剂的企业在向中国消费者销售产品方面出现大幅增长。在这些销售中，虽然一部分是为了那些在澳大利亚购买此类产品并将其运往中国的“代购”，但很多销售仅仅是为了旅客在旅行时“清理货架”。

As we begin delving further into these wider implications, it is worth recounting some of the most crucial facts and figures related to Chinese tourism. These reveal important nuances behind the headline stories about growth in Chinese visits to Australia.

当我们开始深入研究这些更广泛的影响时，一些与中国旅游业相关的重要事实和数字值得重新计算。这些事实和数字可以揭示，中国访澳旅游业增长背后的重要细节。

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Figure 2: Reasons for Chinese visits to Australia, 2005 and 2014	图 2: 2005 年和 2014 年, 中国旅客访澳的原因
Percent	百分比
Holiday	度假
Visiting friends and relatives	走亲访友
Education	教育
Business	商务
Employment	就业
Other	其他

Figure 3: Chinese repeat visits to Australia, 2005 and 2014	图 3: 2005 年和 2014 年, 中国旅客再次到访澳洲
Percent	百分比
First Visit	首次到访
Repeat Visit	再次到访

Chinese visitors come to Australia for varied reasons

中国旅客到访澳洲出于多种原因

One of the most interesting things to consider about Chinese visitors to Australia is why they come. These reasons do not differ greatly from why the Chinese visit other countries, but they are changing.

- 53% of visits are for holidays and tourism
- 20% are to visit friends and relatives (VFR)
- 13% are for education: these numbers are holding steady<sup>10</sup>

最令人感兴趣并值得思索的是，中国旅客为何到访澳洲。这些原因与中国人访问其他国家的原因并没有很大的不同，但是却正在发生改变。

- 53%的访问是针对假期和旅游
- 20%的访问是走亲访友（VFR）
- 13%的访问是为了教育：这些数字保持稳定<sup>10</sup>

Business visits are holding steady in absolute numbers but have reduced significantly as a proportion of total Chinese visits to Australia, going from 24% of total visits in 2005 to 9% in 2014. At the same time, visits for holidays and VFR have each grown in share by 8 percentage points (Figure 2).<sup>11</sup>

商务访问在绝对数量上保持稳定，但在中国访问澳大利亚总人数的比例中下降明显，从2005年占访问总量的24%下降至2014年的9%。与此同时，度假和走亲访友的访问量分别增长了8个百分点（图2）。<sup>11</sup>

The data also shows that when Chinese visitors come to Australia, they like to come back, and rates of repeat visitation are increasing. Today, 46% of Chinese visitors are repeat visitors, up from 37% in 2005 (Figure 3).<sup>12</sup> This is already higher than for Koreans (33%) and Germans (41%), and looks set to overtake the repeat visitor rates for Japan (46%) and the United States (47%) in the near future. While the positive experiences that these repeat visitors have had when first in Australia are likely to be a large part of why they return, we should also consider the role of more deeply established economic engagement. Repeat visits to friends and relatives, for instance, may be the result of a family having sent a child, or multiple children (across an extended family), to Australian universities.

数据还显示，中国旅客到访澳洲后，他们愿意再来，并且再次到访的比例正在增加。如今，46%的中国旅客是回访者，比2005年增加了37%（图3）。<sup>12</sup>这已经高于韩国（33%）和德国（41%）的再次到访率，并且可能会在不久后赶超日本（46%）和美国（47%）。虽然首次访澳的美好经历可能是这些回访者再次访澳的主要原因，我们还应考虑到更深层次经济参与的作用。例如，重访亲朋好友可能是一个家庭将一个或多个孩子（涵盖一个大家庭）送入澳大利亚大学寻求高等教育的结果。

46% of Chinese travelers arriving in Australia are repeat visitors.

到访澳洲的中国旅客 46% 为回访者。



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Figure 4: Average spend per visitor to Australia by country of origin, 2014	图 4: 2014 年, 按来源国划分的访澳旅客的平均花费
<i>A\$000s</i>	1000 澳元
China	中国
South Korea	韩国
Hong Kong	香港
China (excl.edu)	中国 (除教育外)
Germany	德国
Canada	加拿大
Indonesia	印度尼西亚
England	英国
India	印度
Malaysia	马来西亚
Singapore	新加坡

Figure 5: Length of Chinese visitors' stays in Australia, by purpose, 2014	图 5: 2014 年, 按目的划分的中国访澳旅客的停留时间
<i>Average number of days</i>	平均天数
Visiting friends and relatives	走亲访友
Business	商务

Holiday	度假
Average	平均
Source: Tourism Research Australia; L.E.K. research and analysis	数据来源：澳大利亚旅游调查局；艾 意凯研究与分析

Another striking observation is that relative to visitors from other countries, the Chinese are big spenders, averaging \$5,300 per visit (Figure 4). This is significantly higher than for some countries with much higher nominal GDP per person: visitors from the United States average \$2,377 in spending, and those from Japan \$2,472. However, we cannot take the Chinese spending figures at face value: excluding short-term education (such as language classes), the figure drops to around \$3,800.<sup>13</sup> Nevertheless, this is still a significant value for each visitor.

另一个显著的发现是，相较于其他国家的旅客来说，中国旅客出手阔绰，平均每次到访花费 5300 澳元（图 4）。这一数字大大高出一些人均国内生产总值较高的国家：美国旅客的人均花费为 2377 澳元，日本旅客的人均花费为 2472 澳元。但是，我们不能只从浅层分析中国旅客的消费数据：除去短期教育（如语言课程），该数据降至人均 3800 澳元。<sup>13</sup> 然而，这对每个旅客来仍是一个不小的数字。

On average, Chinese visitors stay in Australia for two weeks, a figure that sits between the average holiday visit of 8 days and the average VFR trip of 23 days

(Figure 5).<sup>14</sup> This gives us another point of comparison with visitors from other countries. For instance, the average American visitor stays for a similar period—13 days. Yet the Chinese spend is much higher, even when education is excluded. This looks to be a result of Chinese visitors' propensity to shop while visiting Australia: shopping accounts for 28% of their spending. Chinese consumers are known to place especially high value on the trustworthiness and quality of Australian goods. In contrast, visitors from the United States and similar countries may shop less because they know they have reliable and affordable access to similar goods at home.<sup>15</sup>

中国旅客访澳的平均停留时间为两周，这一数字介于平均度假停留时间的 8 天和走亲访友的 23 天之间（图 5）。<sup>14</sup> 我们可以将这数据与其他国家相比较。例如，美国旅客的平均停留时间与中国相近——13 天。但是即使排除教育支出，中国旅客的花费仍高得多。这似乎是中国旅客访澳期间购物倾向的结果：购物占他们花费的 28%。众所周知，中国消费者特别重视澳洲产品的信誉和质量。相比之下，来自美国和相似国家的访客可能较少购物，因为他们在自己国内就可以买到质量靠谱并且价格实惠的相似产品。<sup>15</sup>

We are also seeing the nature of visits changing; anecdotal reports suggest the visitor mix is shifting to favour independent travellers rather than tour groups.

我们也看到了访客性质正在发生变化：坊间报道显示，旅客组合正转变为偏爱自由行的旅客，而非旅游团。

It is instructive to assess how Australia is faring in its competition to attract Chinese tourists. Around 120 million Chinese travelled last year, and Australia's share was around 1 million, or 1%. This percentage share has remained roughly steady over the last five years even as the absolute number of total visitors has risen, from around 356,000 in 2009 to the 2015 figure of 1 million.

评估澳大利亚在竞争中如何吸引中国旅客大有裨益。去年，约有 1200 万中国人旅游，澳大利亚所占份额约为 100 万，即 1%。虽然赴澳旅客人数由 2009 年的 35.6 万上升至 2015 年的 100 万，但这一百分比在过去五年中基本没有太大波动。

But looking at this from a slightly different perspective, Australia's share of long-haul travel from China (which excludes countries in north-east, south-east and central Asia) has fallen slightly from 7% to 6%. Other markets, including long-haul destinations like the United States and Switzerland, and short-haul destinations such as South Korea and Thailand, have gained share. Factors influencing this could include the easing of visa requirements for Chinese visitors in the United States and Europe, the popularity of Europe as a luxury shopping destination, and the strengthening of the yuan against the euro. Australia is not the only country that sees value in attracting Chinese travellers, and it will have to work hard to maintain or grow its share of the increasing numbers.

但是从略微不同的角度来看，澳大利亚在中国长途旅行（不包括东北亚、东南亚和中亚国家）中所占份额从 7% 稍稍下降至 6%。而在其他市场，包括美国和瑞士等长途旅行地、韩国和泰国等短途旅行地，市场份额均有增加。影响因素可能包括：美国和欧洲放宽对中国旅客的签证要求，欧洲作为奢侈品消费地受到喜爱，以及人民币兑换欧元的升值。在吸引中国旅客方面，澳大利亚不是唯一一个发现其价值的国家。它必须在日渐增多的国家中，努力维持和增加澳大利亚的份额。

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Even as airline capacity grows to meet demand, more direct services are established between Australian and Chinese cities, and tourism businesses benefit from the ongoing surge in arrivals, the boom in Chinese visits will create new pressures. Infrastructure may be strained, and key tourism sites could struggle to accommodate visitor volume. Perhaps most crucially, Australia may find it difficult to supply sufficient labour with the Chinese-language skills and cultural knowledge needed to deliver these visitors a compelling, high-quality experience that encourages them to return and to deepen their economic engagement with Australia. One recent study estimated that there were only 130 Mandarin speakers in Australia, of a non-Chinese background, that were proficient enough to teach it effectively or to conduct an entire business meeting in the language (“Australians’ Chinese-language Skills are Lagging”).

为满足需求，航空运力不断增长，更多直接服务在澳大利亚和中国多城市之间建立，抵达旅客数量不断增加，旅游业也因此受益。即便如此，中国旅游热仍将产生新的压力。基础设施可能面临压力，主要旅游景点可能难以容纳旅客量。也许最为关键的是，澳大利亚可能难以提供充足的、具备中文技能和文化知识的劳动力，来为这些旅客们提供引人入胜、品质卓越的体验，并以此来鼓励他们重返并加深与澳大利亚的经济交往。近期一项研究估计，澳大利亚仅有130位非华裔但会讲普通话的人，能够有效地教授普通话或使用普通话进行整个商务会议（“澳大利亚人的中文能力滞后”）。

## Australians' Chinese language skills are lagging

澳大利亚人的中文能力滞后

“The current number of proficient adult speakers of Chinese in Australia of non-Chinese background is 130 at most, and half of those are already over 55 years of age. Obstacles and disincentives discourage non-Chinese students from taking up or persevering with Chinese as a second language, to the point where only 5 per cent of those who enrol in it at secondary school continue it to year 12. Last year, there were 400 year 12 students of Chinese as a second language – 20 per cent fewer than in 2008.”

目前在澳大利亚，精通中文而非华裔的成年人数最多为 130 人，其中一半以上已经超过了 55 岁。一些障碍和限制阻止了非华裔学生接受或继续使用中文作为第二语言，仅有 5% 的中学生坚持学习中文到 12 年级。去年，12 年级将中文作为第二语言的学生有 400 个，人数比 2008 年少了 20%。

“Australians are too Lazy to Master Chinese,”

Jane Orton, *Sydney Morning Herald*, 15 March 2016

“澳大利亚人懒得学汉语”

简·奥顿（Jane Orton），《悉尼先驱晨报》，2016 年 3 月 15 日

Australia's 40% share of Chinese beef imports is worth 750m per year.

澳大利亚 40% 的中国牛肉进口份额每年价值 7.5 亿澳元。

Tourism is linked to other industrial sectors

旅游业与其他产业部门相连

In Table 1, we saw the top 10 categories of Australian exports. These are a mix of natural resources, services, agricultural commodities and manufactured goods.

从表1中我们看到了澳大利亚出口的前十类产品，它们是自然资源、服务、农产品和加工品的组合。

While Australia only has a 1% share of Chinese tourism, it holds an outsized share in a number of other areas:

In wine, Australia has a 14% share of Chinese imports by volume but a 23% share by value, indicating premium positioning.

- In beef, Australia's 40% share of the Chinese import market is worth \$750 million per year.
- In vitamins and supplements, Australian firms have already reached \$230 million per year in sales to China.
- In education, Australia has an 11.5% share of all Chinese overseas students. It takes third place behind the USA and the UK, which both have significantly larger populations.



虽然澳大利亚仅占中国旅游业份额的 1%，但在其他一些领域占有相当大的份额：

- 在葡萄酒方面，澳大利亚占中国进口份额的14%，但按价值计算则占23%，这表明澳大利亚已处于领先地位。
- 在牛肉方面，澳大利亚在中国进口市场40%的份额每年价值7.5亿澳元。
- 在维生素和保健品方面，澳洲公司每年在中国的销售额已达2.3亿澳元。
- 在教育方面，在澳的中国留学生占有所有中国留学生的 11.5%，位列第三，仅次于美国和英国这两个留学大国。

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The vitamin export story

维生素出口

“Consumers in China have flocked to online sites such as Alibaba, while Chinese tourists and entrepreneurs visiting Sydney and Melbourne are cleaning out the vitamins section on the shelves of chemist warehouses and supermarkets to take bottles back home.

“中国消费者通常使用在线网站进行购物，如阿里巴巴等。然而到悉尼和墨尔本旅游的中国旅客及商务人士会在连锁药店“化学家仓库”（Chemist Warehouse）或其他超市的货架上扫货，把维生素大瓶小瓶地带回家。

After a series of contamination scares in China involving milk powder, frozen berries and infant formula, the Blackmores name has been latched onto by shoppers in Shanghai and Beijing as a bastion of ‘clean and green’ quality and trust.

当毒奶粉、冻莓、婴儿奶粉等一系列食品污染事件在中国引发恐慌后，上海和北京的消费者们已经把“澳佳宝”这一品牌与“卫生环保”、高质量、值得信赖这样的标签相挂钩。

The demand for Australian vitamins is also helping other firms such as Swisse

Wellness, which has experienced a strong profit surge. Even some of the almost

forgotten names in healthcare have benefited. The Faulding brand, with smart new packaging for a range of vitamins and probiotics, produced a 29 per cent surge in sales in 2014–15 for its owners, the Australasian firm EBOS Group.”

中国市场对澳大利亚维生素产品的需求还改善了其他公司的状况，如斯维思公司（Swisse Wellness）就因此获得了巨大的利润增长，甚至一些快要被公众遗忘的保健品品牌也都因此受益。科鼎（Faulding）在更新了维生素和益生菌产品的包装后，曾在 2014 至 15 年期间为其总公司澳大拉西亚的 EBOS 集团实现了 29% 的销售增长。”

“Supercharging Blackmores Vitamins Profits via Chinese Celebrities Li Na and Fan Bingbing,” Simon Evans, *Sydney Morning Herald*, 25 August 2015

“澳佳宝维生素产品的利润大幅增长是通过中国名人李娜和范冰冰所实现的。”西蒙·埃文斯（Simon Evans），《悉尼先驱晨报》，2015 年 8 月 25 日

A range of vitamins and probiotics produced a 29% surge in sales in 2014–15 for its owners, the Australasian firm EBOS Group

2014 至 2015 年间，维生素和益生菌等系列产品为澳大拉西亚的 EBOS 集团实现了 29% 的销售增长

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In all these areas, trade is growing strongly. Chinese investment in Australia is also significant, with the main destinations being business acquisitions and real-estate. The ChAFTA will only accelerate the growth we have been seeing in both trade and investment.

在这些领域中，贸易长势强劲。中方在澳方的投资也相当巨大，其主要投资方向为业务并购与房地产行业。《中澳自由贸易协定》只会加速我们在贸易与投资领域中已看到的增长。

While China–Australia trade flows in individual industries are understood increasingly well, the links between them, and the links with Chinese tourism (Figure 6), are topics on which there has yet been little research.

虽然中澳个别行业中的贸易往来情况日益明朗，但是对它们之间的联系以及与中国旅游业之间联系的研究（图6）却非常之少。

Our campaign of targeted market research, including the survey that is the centrepiece of this study, has sought to uncover the relationships between Chinese visits to Australia and other types of economic activity. This is a first step towards establishing a formal base of knowledge on this important topic.

我们对目标市场做所的研究，包括这项研究的核心调查，旨在揭示中方赴澳旅游业与其他经济活动之间的关系，这是对这一重要话题建立基本认知的第一步。

Figure 6: The complex links between Chinese visits, trade and investment

Visitors (first visit)	Repeat visits
	Tertiary education
	Real-estate investment
Non-visitors	Business investment
	Permanent migration
	Preference for Australian goods in China

图 6：中国旅游业、贸易与投资之间的复杂联系

访问者 (首次到访)	再次到访
	高等教育
	房地产投资
非访问者	商业投资
	永久居民
	喜爱澳大利亚在华销售的商品

34% of Chinese visitors or their children have pursued tertiary education

Student name: Yueyi CHEN, Wei JIN

Subject code: TRAN90010

Project 4: L.E.K How the China tourism boom is transforming Australia

34%的中国旅客或其子女曾在澳大利亚寻求高等教育

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Figure 7: Survey respondent demographics

Percent

Gender	Age	Education level	After tax annual income*	Residency status in Australia
Male	>55	PhD	>A\$105K	Non-PR
Female	45-55	Master's degree	A\$85K-105K	PR
	36-45	Bachelor's degree	A\$65K-85K	
	26-35	Diploma	A\$40K-65K	
	18-25	High school	A\$25K-45K	
			<A\$25K	

Note: \*At an exchange rate of A\$1 : ¥4.7

Source: L.E.K. research and analysis

图 7: 受访者统计资料

百分比

性别	年龄	受教育程度	税后年收入*	在澳居民身份
男性	>55	博士	>10.5 万澳元	非永久居民

女性	45-55	硕士	8.5 万-10.5 万 澳元	永久居民
	36-45	学士	6.5 万-8.5 万 澳元	
	26-35	结业	4.0 万-6.5 万 澳元	
	18-25	高中	2.5 万-4.5 万 澳元	
			<2.5 万澳元	

注：澳元与人民币的汇率为 1:4.7

来源：艾意凯调查与分析

About the L.E.K. survey

关于艾意凯调查

In the first quarter of 2016, we conducted a survey of 514 recent Chinese visitors to Australia. The aim was to understand their existing and potential levels of economic engagement beyond tourism. We wanted to quantify the likelihood that these visitors would pursue deeper economic engagement with Australia after their initial visit, and also to understand the extent to which their recent visits had influenced them to pursue (or not pursue) that engagement.



2016 年第一季度，我们对 514 位近期到访过澳大利亚的中国旅客进行了调查。

该项调查旨在了解除旅游业外，旅客对现有及潜在经济活动的参与程度。我们希望量化这些旅客在首次到访澳大利亚后，想要寻求更深层经济参与的可能性，并且了解近期旅游体验对他们参与（或不参与）更深层经济活动的影响程度。

The survey consisted of 50 questions and was conducted online over a one-week period. The majority of respondents came from Tier 1 cities such as Beijing, Shanghai and Guangzhou. All were in China at the time of taking the survey, and had travelled to Australia in the past three years. We selected this time frame not only to focus on recent visits, but also to broadly reflect the effects of current visa requirements, which have made it easier for the Chinese to visit Australia over time.

此项调查共计有 50 个问题，并于一周内线上进行。大部分受访者来自中国的一线城市，如北京、上海和广州。所有受访者在接受调查期间均身处中国境内，并且在过去三年间曾前往澳大利亚。我们之所以选择这一时间范围，不仅是要聚焦于近期的旅游活动，还要广泛反映当前签证要求的影响，当前的签证要求使中国人到访澳大利亚变得越来越容易。

Survey respondents were distributed across both sexes and a range of income levels, though most were relatively young and highly educated (Figure 7). The sample contained equal numbers of males and females, mainly between 26 and 45. Ninety-

one per cent had a bachelor's degree or better. The visitors' weighted average salary after tax of \$71,290 compares favourably even to the average Australian income, which stands at around \$78,000 per year before tax.

本项调查的受访者大多数为年轻人，且有较高的受教育程度，男女性受访者均有参与，并且覆盖不同收入层次（图7）。样本涵盖的男女性受访者人数相同，主要介于26至45岁之间。其中，91%的受访者具有学士及以上学历。受访者的税前年均收入为71290澳元，这一数字与澳大利亚的税前年均收入相比（约78000澳元），已较为可观。

So, what did the survey uncover about the broader implications of Chinese visits to Australia?

那么，调查发现中国旅客赴澳的更广泛影响是什么？

Nearly half of Chinese visitors to Australia are repeat visitors

近半数中国赴澳旅客为回访者

Today, almost half of Chinese visitors to Australia are repeat visitors. We were interested in what kind of deeper connection with Australia this might represent, and to see what specific links there might be between tourism and other types of economic engagement. Some of our questions were:

- How many visitors have their children in education in Australia?

- How many have invested in real-estate or in a business?
- Did the visit change people's intended future behaviour?
- When they returned to China, did it change their consumption of goods and services from Australia?
- How significant could the effects of these changes be?

如今，近半数中国赴澳旅客为回访者。我们对这一现象背后旅客与澳大利亚之间的深层联系很感兴趣，并且也想了解旅游业与其他类型的经济活动之间可能存在的特殊关系。所以我们提出了以下问题：

- 有多少旅客的子女曾在澳大利亚接受教育？
- 有多少旅客曾在房地产或商业领域进行投资？
- 到访澳大利亚是否改变了他们预期的未来行为？
- 当旅客回到中国后，他们对澳大利亚产品和服务的消费行为是否有所改变？
- 这些改变的影响有多大？

The results of our research bring much-needed data to the conversation around these issues. Our interest here was not to get precise numbers about what Chinese visitors to Australia are doing at a micro level, but to validate our overall intuition that Chinese visits could have greater economic potential outside the tourism and retail industries, and to broadly estimate that potential's magnitude.

我们的研究结果为这些问题提供了亟需的数据。我们并非是为了得到微观层面上中国赴澳旅客的确切数字，而是为了证实我们的大体直觉，即中国赴澳旅客

Student name: Yueyi CHEN, Wei JIN

Subject code: TRAN90010

Project 4: L.E.K How the China tourism boom is transforming Australia

在旅游业与零售业以外具备更大的经济潜力，并且从广义上预测这一潜力的巨大程度。

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Figure 8: Deeper economic engagement pursued by Chinese visitors with Australian PR	图 8: 具有澳大利亚永久居民身份的中国旅客所参与的更深层经济活动
Percent	百分比
Pursued tertiary education	寻求高等教育
Bought real estate	购买房产
Invested in a business	投资商业
Source: L.E.K. research and analysis	来源: 艾意凯调查与分析

Figure 9: Deeper economic engagement pursued by Chinese visitors without Australian PR	图 9: 不具有澳大利亚永久居民身份的中国旅客所参与的更深层经济活动
Percent	百分比
Pursued tertiary education	寻求高等教育
Bought real estate	购买房产
Invested in a business	投资商业

Figure 10: Intentions for deeper economic engagement of Chinese visitors without Australian PR	图 10: 不具有澳大利亚永久居民身份的中国旅客参与更深层经济活动的意向
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Percent	百分比
Pursued tertiary education	寻求高等教育
Bought real estate	购买房产
Invested in a business	投资商业
c.85% were influenced or highly influenced by their tourist visit	85%的中国旅客受到旅游的影响或高度影响。
Visitors who would probably or definitely...	有可能或极有可能参与的旅客...
Visitors who have already...	已经参与的旅客...

A large proportion of Chinese visitors claim to be permanent residents

大部分中国旅客称自己是澳大利亚永久居民

Somewhat to our surprise, we found that even though all of the survey respondents live in China, 20% of the sample claimed to have Australian permanent resident (PR) status. We are inclined to treat this observation with some scepticism. Yet, these claims point to an important phenomenon—that many Chinese visitors already have significant economic engagement with Australia that goes well beyond mere tourism.

出乎意料的是，我们发现虽然此项研究所有的受访者都居住在中国，但 20% 的受访者宣称具有澳大利亚永久居民身份。我们对这一调查结果持怀疑态度。但

是，这些说法也揭示了一个重要现象——许多中国旅客已与澳大利亚有重大的经济接触，这已远远超出了单纯旅游业的范畴。

Since the high proportion of PRs could skew the results of our analysis, we chose to examine self-reported PRs and non-PRs as separate groups.

由于受访者中澳大利亚永久居民人数的高比例会影响我们分析结果的准确性，我们将那些自称是永久居民的受访者和非永久居民的受访者分组进行研究。

When looking at PRs alone, the level of broader economic engagement is significant (Figure 8):

- 34% had pursued tertiary education for themselves or their children
- 45% had bought real-estate
- 25% had invested in a business

单看持有永久居民身份的受访者，他们参与澳大利亚经济活动的层面更广，且意义重大（图8）：

- 34%的永久居民受访者或其子女曾在澳大利亚寻求高等教育
- 45%的永久居民受访者购买过房产
- 25%的永久居民受访者进行过商业投资

Clearly, many in this group already have a deep economic engagement in Australia.

On one level, this is not surprising, but it does become more noteworthy when one considers that they all said that they still reside in China.

显然，这一群体中的许多人已在澳大利亚参与了深层次的经济活动。从某种程度上说，这并不令人吃惊，但当他们全部称自己仍居住在中国时，这就变得更值得注意了。

For the non-PR group, the proportion that had pursued these activities was still significant: 9% had sought education in Australia for themselves or their children, 5% had bought real- estate and 3% had invested in a business (Figure 9).

对非永久居民受访者来说，从事这些活动的比例同样很高：9%的人或其子女曾在澳大利亚寻求高等教育，5%的人购买过房产，3%的人进行过商业投资（图9）。

While smaller than the percentages we found for the PR group, in absolute terms these still represent significant numbers: just 3% of 800,000 non-PR visitors investing in a business is 24,000 people in total.

虽然非永久居民受访者经济活动的参与比例要比永久居民受访者低，但其数字仍相当可观：80万非永久居民受访者中有3%的人进行过商业投资，总计2.4万人。



When we asked this non-PR group not just what they had already done, but also what they were definitely or probably going to do, the numbers became much greater (Figure 10).

- 74% planned to pursue education in Australia, either themselves or for their children, or already had
- 48% planned to buy real-estate, or already had
- 41% planned to invest in a business, or already had

当我们询问这组非永久居民受访者，他们在澳大利亚已经进行过的经济活动，以及今后他们很有可能从事的经济活动后，这一数字又有了很大的增长（图10）。

- 74%的非永久居民受访者曾计划自己或其子女在澳大利亚寻求教育，或者已经在澳大利亚完成了教育
- 48%的非永久居民受访者曾计划或已经购买房产
- 41%的非永久居民受访者曾计划或已经进行过商业投资

When asked how significant their first visit was to their decision-making, 85% said they had been influenced or highly influenced by coming to Australia.

当被问及首次到访澳大利亚的经历对他们的决策有多大影响时，85%的受访者表示受到了影响，甚至受到了很大影响。

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Figure 11: Chinese purchases of Australian goods and services, before and after first visit	图 11: 中国旅客在首次到访澳大利亚前后购买澳大利亚商品和服务的情况
Percent	百分比
Before first Australia visit	首次到访澳大利亚前
After first Australia visit	首次到访澳大利亚后
Yes	购买
No/Don't know	未购买/未知

Figure 12: Increase in average annual spend on Australian goods and services inside China, before and after first visit	图 12: 首次到访前后, 中国旅客对澳大利亚在华商品和服务的年平均支出增长情况
A\$000s	1000 澳元
40% increase	增长 40%
Pre-First Australia visit	首次到访澳大利亚前
Post-First Australia visit	首次到访澳大利亚后
Goods	商品
Services	服务
Average value of each purchase	单次消费平均额
c.A\$108	108 澳元

c.A\$118	118 澳元
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Chinese visitors buy more Australian products at home

中国旅客在华购买更多澳大利亚产品

We also asked survey participants about their consumption of Australian goods and services while in China.

我们还对受访者在华期间对澳大利亚商品和服务的消费情况进行了调查。

Chinese visitors to Australia are already alert to the attractions of Australian products, particularly meat, dairy, wine and vitamins. Before their first visit to the country, 71% already bought Australian goods and services regularly. However, this rose to 97% after the visit (Figure 11).

赴澳旅游的中国旅客已知晓澳大利亚产品的吸引力，尤其是肉类、奶制品、葡萄酒和维生素。在他们首次前往澳大利亚前，71%的受访者已定期购买澳大利亚商品和服务。然而，在他们首次到访后，这一比例上升至97%（图11）。

These respondents' average spending on Australian goods and services rose from \$2,700 per year to \$3,700 per year after their visit: a 40% increase (Figure 12). Such changes in spending are fuelling the phenomenal and well-known growth of companies like Blackmores and Swisse in the Chinese market.

在前往澳大利亚后，这些受访者在澳大利亚商品和服务上的平均年支出从 2700 澳元增长至 3700 澳元，涨幅 40%（图 12）。这一消费变化正推动着一些澳大利亚公司在中国市场上惊人的和极好的发展，如澳佳宝和斯维思。

97% of visitors from China buy Australian products regularly

97%的中国旅客定期购买澳大利亚商品

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Table 3: Value of potential spending by category

Category	Value
Repeat visit	\$5,300 Average spend per Chinese visitor per visit
Tertiary education	\$50k per year Spend in tuition and living expenses
Real-estate investment	\$400k Average value of property bought
Business investment	\$1 million Average annual turnover of business investment
Australian goods and services in China	\$3,700 Average annual spend on Australian goods and services after first visit to Australia

表 3：不同类别消费行为的潜在价值

类别	价值
再次到访	5300 澳元 中国旅客单次到访澳大利亚的人均消费
高等教育	年均 5 万澳元 高等教育及住宿方面的花费
房地产投资	40 万澳元

	单次购买房产的平均花费
商业投资	100 万澳元 商业投资年平均营业额
澳大利亚在华的商品及服务	3700 澳元 首次到访澳大利亚后在澳大利亚产品和服务上的年均花费

Table 4: Estimated total value of Chinese visitors' engagement with Australia, 2015

	Actual percentage of visitors	Value in 2015 (1m visitors)
First visit	100%	\$5.3bn Focus today
Repeat visit	73%	\$3.9bn
Tertiary education	9%	\$9bn
Real-estate investment	5%	\$21bn
Business investment	3%	\$31bn
Australian goods and services in China	24%	\$0.9bn
		Categories of significant value

表 4：2015 年中国赴澳旅客所参与的经济活动总价值估算

	旅客实际占比	2015 年的价值（100 万 旅客）
首次到访	100%	53 亿澳元 当前重点数据
再次到访	73%	39 亿澳元
高等教育	9%	90 亿澳元
房地产投资	5%	210 亿澳元
商业投资	3%	310 亿澳元
澳大利亚在华的商品及 服务	24%	9 亿澳元
		具有重要价值的分类

Chinese tourism to Australia creates an enormous broader opportunity

中国赴澳旅游业创造了极其广阔的机遇

Having some of these basic numbers, we are able to illustrate the dollar value of the broader opportunity arising from Chinese tourism to Australia.

基于这些数字，我们可以展示中国赴澳旅游业带来广阔机遇的金钱价值。

Though it would be dangerous to view extrapolations from a sample of 500 people as definitive, we nevertheless offer them to give a general estimate of the potential economic impact.

尽管从 500 人的样本中做出推断有一定的风险，但我们还是让他们对潜在经济影响作出总体估计。

First, we needed to find the average value of the transactions we expect visitors to engage in (Table 3):

- A repeat tourism visit is worth \$5,300.
- Those engaging in education are estimated to spend \$50,000 per year on tuition fees and living expenses combined, for two years on average.
- Real-estate investment is estimated at an average of \$400,000 per investor.
- We assume average annual turnover in business investment of \$1 million per respondent expressing this intention (although survey respondents recorded values for planned investment of up to \$7 million).

首先，我们需要知道我们期望旅客参与的交易活动的平均价值（表 3）：

- 一次回访旅游价值 5300 澳元。
- 预估赴澳留学生每年在学费和生活费上花费 5 万澳元，平均花费两年时间。
- 投资者在房地产上的投资预估为人均 40 万澳元。
- 我们假设每位有意进行商业投资的投资者年均获得 100 万澳元的营业额（尽管受访者表示他们预期投资的价值高达 700 万澳元）。



Taking these figures at face value, we can extrapolate the total value of this activity to Australia.

从这些数字的表面价值，我们可以推算出各活动可为澳大利亚产生的总价值。

Australia generates \$5.3 billion per year from tourism alone, based on the observation of a \$5,300 average spend multiplied by 1 million total visitors per year in 2015 (Table 4). But now we can also look at the potential scale of Chinese visitors' broader engagement with the Australian economy.

- The 73% of respondents who said they planned a repeat visit are worth a total of \$3.9 billion in spending each year.
- The 9% that have already commenced education will be worth an estimated \$9 billion (assuming two years of study).

2015 年，共计 100 万名旅客赴澳旅游，人均消费为 5300 澳元。从这一数据来看（表 4），两者相乘，仅旅游业一项就为澳大利亚带来每年 53 亿澳元的收入。但现在我们也可以看出中国旅客更广泛参与澳大利亚经济的潜在规模。

- 73%的受访者曾表示，他们计划再次前往澳大利亚，他们的年均总开支为 39 亿澳元。
- 9%的受访者已在澳大利亚接受教育，预估这项活动的价值为 90 亿澳元（假定学习周期为两年）。

These are big numbers that begin to dwarf the immediate tourism spending.

旅游支出与这些“天文数字”相比，就显得相形见绌了。

But what if we looked at these visitors' potential economic engagement in the future, not just what is happening right now?

但是，如果我们不局限于当下，而是放眼这些旅客未来潜在的经济参与，又会怎样呢？

Clearly, we need to take our survey figures with a grain of salt: there is no guarantee that people will be able to follow through on all of their intentions. We also need to acknowledge the implausibility of some of the numbers it is possible to come up with by extrapolating from this data. For instance, the entire international education market in Australia is worth only \$15 billion per year today. But if 74% of the 800,000 non-PR Chinese visitors to Australia this year followed through with an intention to pursue tertiary education in this country for themselves or their children, the value of that market would rise to \$74 billion dollars per year (Table 5).

显然，我们要以批判的眼光来看待调查结果：没有人能保证受访者们今后一定会继续他们当前所做的计划。我们也需要承认一些推断得来的数字的确令人难以置信。例如，当前澳大利亚的整个国际教育市场每年仅值 150 亿澳元。但如果在今年 80 万赴澳旅游且未持有永久居民身份的中国旅客中，有 74% 的人有意

在澳寻求高等教育，或让其子女寻求高等教育，那么这一市场的价值将上升到 740 亿澳元（表 5）。

Then we can look at real-estate and business investment, which in 2015 had a potential value of \$194 billion and \$408 billion respectively.

接着我们再来看看房地产和商业投资方面的情况：2015 年它们的潜在价值分别为 1940 亿澳元和 4080 亿澳元。

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These are *very* big numbers.

这些数字都相当可观。

Taking all of the activities we considered together—repeat tourism, education, real-estate and business investment, and purchases of Australian goods and services in China—if only 1 in 10 people expressing an intention to engage in economic activity followed through with that intention, it would be worth \$70 billion annually. By 2025, given a doubling in visitor numbers, the annual value would be \$140 billion, dwarfing the economic impact of tourism alone.

我们把所有的经济活动，包括再次到访、教育、房地产和商业投资，以及在华购买澳大利亚商品和服务都考虑在内的话——如果每十位有意从事有关经济活动中的人有一位真的实践了自己的想法，那么光这一项每年带来的收入就会达到 700 亿澳元。到 2025 年，如果旅客数量翻倍，那么这一项的全年收入将达到 1400 亿澳元。与之相比，仅靠旅游业所带来的经济影响就显得微不足道了。

There is further work to be done in establishing more certainty and precision around these figures. But from these extrapolations, and by taking the holistic approach that sees tourism as just one particularly visible indicator of Chinese economic engagement with Australia, we can clearly see the enormous scale of the potential opportunity.

要想获得更加精确的信息，我们还有许多工作要做。但通过这些推断并从整体来看，旅游业仅仅是中澳经济交往的一个方面，我们可以清楚地看到其中潜在机遇的巨大规模。

#### Industry and government must seize the moment

有关行业和政府必须抓住时机

Recent growth in Chinese tourism is an enormous economic boon to Australia, but focusing on tourism alone misses the full scale of the opportunity. It also misses the nuances of how that opportunity has come about and how to maximise the broader benefits.

近年来中国旅游业的发展为澳大利亚带来了巨大的经济收益。但是仅仅着眼于旅游业就会错失全面的机遇。这一机遇是如何发生的、如何最大限度地获得更广泛的收益，仅关注旅游业也会忽视这两者之间的细微差别。

By 2025 the potential economic impact of Chinese travellers to Australia could be \$140bn

到 2025 年，中国旅客为澳大利亚带来的经济效益可达 1400 亿澳元

Table 5: Illustrative potential value of Chinese visitors' engagement with Australia, based on stated intentions, 2015 and 2025

## Project 4: L.E.K How the China tourism boom is transforming Australia

	Percentage of visitors who have pursued or “would probably or definitely” pursue activity	Value in 2015 (1m visitors)	Value in 2025 (2m visitors)	
First visit	100%	\$5bn	\$10bn	
Repeat visit	73%	\$4bn	\$8bn	Even if only 10% of this value was realised, it would amount to between c.\$70bn and c.\$140bn for the Australian economy
Tertiary education	74%	\$74bn	\$148bn	
Real-estate investment	48%	\$194bn	\$388bn	
Business investment	41%	\$408bn	\$816bn	
Australian goods and services in China	24%	\$1bn	\$2bn	

表 5：基于受访者所述意向，2015 年和 2025 年中国旅客参与澳大利亚经济活动所产生的潜在价值比较

	已经在澳寻求教育、 可能或一定会赴澳寻 求教育的旅客人数比 例	2015 年生 产总价值 (100 万旅 客)	2025 年生 产总价值 (200 万旅 客)	
首次到访	100%	50 亿澳元	100 亿澳元	
再次到访	73%	40 亿澳元	80 亿澳元	即使仅能实现 总价值的 10%，也将为 澳大利亚经济 带来 700 亿澳 元至 1400 亿 澳元的收入。
高等教育	74%	740 亿澳元	1480 亿澳 元	
房地产投 资	48%	1940 亿澳 元	3880 亿澳 元	
商业投资	41%	4080 亿澳 元	8160 亿澳 元	
澳大利亚 在华的商 品及服务	24%	10 亿澳元	20 亿澳元	

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Figure 13: Chinese investment in Australian real-estate, 2013–15	图 13: 2013 至 2015 年, 中国对澳大利亚房地产的投资额
\$ billion	十亿澳元

Figure 14: Chinese and American investment in Australia, 2014–15	图 14: 2014 至 2015 年, 中国和美国在澳大利亚的投资额
\$ billion	十亿澳元
USA	美国
China	中国

Figure 15: Australian beef and wine exports to China, 2015 and 2016	图 15: 2015 和 16 年澳大利亚牛肉及葡萄酒对华出口额
\$ million	百万澳元
Beef	牛肉
Wine	葡萄酒
Jan-Feb 2015	2015 年 1-2 月
Jan-Feb 2016	2016 年 1-2 月

Chinese investment in Australia

中国在澳投资



Chinese investors in Australia continue to pile into the property market, with investment in real-estate growing to \$24 billion in 2014–15, double the previous year's figure.<sup>18</sup> But they are also choosing to invest their wealth across other sectors of the economy, including agriculture, finance and manufacturing.

在澳大利亚的中国投资者持续涌入房地产市场。2014 至 2015 年间，房地产投资额增长至 240 亿澳元，较前一年数额翻倍。<sup>18</sup>但与此同时，他们也选择在其他经济领域进行投资，包括农业、金融和制造业。

In 2014–15, China was the largest foreign investor in Australia, with investments almost double the value of that of those originating from the United States, the second-largest source of foreign investment in Australia.<sup>19</sup>

2014-15 年间，中国成为澳大利亚最大的外来投资国，其投资额几乎是澳大利亚第二大外来投资国美国的两倍。<sup>19</sup>

Early figures following the launch of the China–Australia Free Trade Agreement (ChAFTA), show a promising future for not only for Chinese investment in Australia, but also for Australian exports to China. For example, in the first two months of 2016, frozen beef sales to China rose to \$95 million, up 44% on the same period last year, while bottled wine sales climbed 122% to \$143 million.<sup>20</sup>

《中澳自由贸易协定》出台后的早期数据显示，中方在澳投资以及澳方对华出口的前景双双看好。例如，在 2016 年的前两个月，冷冻牛肉在华销售额增至 9500 万澳元，同比增长 44%；瓶装葡萄酒销售额增长 122%，增至 1.43 亿澳元。<sup>20</sup>

#### \$24bn Chinese investment in Australian real-estate in 2014–2015

2014-15 年间，中国对澳大利亚房地产市场投资额达 24 亿澳元

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At best we are holding our share of Chinese tourism. We must invest in making sure

Australia remains an attractive destination

就最乐观的一面来看，澳大利亚在中国旅游业中仍然占有一席之地。我们必须加大投资，从而确保澳大利亚仍具备吸引力。

### Conclusion

结论

When we begin to think about tourism as the front door to much deeper economic engagement, we quickly see that a range of implications and responsibilities arises.

To harness the full economic potential of Chinese tourism, government and business will need to take action.

当我们开始将旅游业视为通往更深层经济参与的大门时，我们很快会面临一系列的结果和责任。要想充分发挥中国旅游业的经济潜力，政府和企业都需要采取行动。

First, there is a need for continued investment in research into the links between Chinese tourism and economic engagement with Australia. Our own preliminary research has only scratched the surface, albeit by firmly establishing that this is an area worthy of far greater attention.

首先，我们需要继续研究中国旅游业与澳大利亚经济活动之间的联系。虽然我们的初步研究还不够深入，但我们坚信这一领域值得更多的关注。

Second, because of the magnitude of the economic opportunity that Chinese tourism opens up, business and government will need to invest in making sure that Australia remains an attractive destination and that visitor numbers continue to grow. At present, Australia is at best merely holding its share of Chinese tourism, and may even be losing share gradually. Other countries, such as the United States, Canada, New Zealand, South Korea and Singapore, have also spotted the opportunity and are investing: Australia's efforts must match theirs.

其次，由于中国旅游业所带来的巨大经济机会，企业和政府需要在这方面进行投资，从而确保澳大利亚仍然是一个有吸引力的目的地，旅客数量将继续增长。目前，澳大利亚充其量只是在中国旅游业中占有一席之地，甚至可能会逐渐失去地位。其他国家也发现了这一商机，并且正在进行投资，如美国、加拿大、新西兰、韩国和新加坡等。澳大利亚政府和企业必须要做出和其他国家相同程度的努力。

A good deal of this investment must go towards ensuring that Chinese visitors to Australia have not just a positive experience, but an excellent one. On the government side, there is work to be done in making sure that visa-application processes, for the right kind of visitor, run smoothly and are easy to navigate. Other problematic aspects

of the traveller experience, such as long queues at airports for the Tourist Refund Scheme, may also be in need of government attention. Government can also play a role in facilitating or encouraging investment to ensure that our airports and other transport facilities are among the world's best.

投资的很大一部分必须用于确保中国旅客访澳的体验不仅是良好的，而且是绝佳的。对政府来说，为合适的申请者提供运行顺畅、易于浏览的签证流程，这方面还有待提高。政府还需要注意一些旅客体验方面的问题，如机场退税处的排队队伍太长等。同时，政府要在促进或鼓励投资方面发挥作用，确保我们的机场和其他交通设施的使用体验都位于世界前列。

Other, "softer" aspects of the travel experience for Chinese visitors also need attention, and this indicates further areas where government investment or policy could be lacking. Australia is blessed with a substantial number of people who are of Chinese birth or descent, including many who are fluent in both Chinese and English. Yet, a frequent lack of signage and customer service in Chinese suggests a need for more education in the language for Australians not of a Chinese background. Promoting the acquisition of such skills is a matter not just of investment, but also of appropriate policy.

并且，中国旅客体验的“软”方面也需要关注，这显示出政府投资或政策在其他领域可能有所欠缺。当前有相当一部分华人生活在澳大利亚，包括许多精通中英文的人才。然而，大范围缺失中文标示和中文服务，这一现象表明非华裔的

澳大利亚人需要进一步的中文教育。促使澳大利亚人掌握中文及中国文化，这不仅是投资问题，也与合适的政策有关。

Provided that Australia is able to maintain or even increase its attraction to Chinese visitors, it is then necessary to more fully harness the opportunities for broader economic engagement that this opens the door to. There is a particular need for savvy promotion.

要想澳大利亚保持甚至增加对中国旅客的吸引力，那么就有必要更充分地利用这一机会进行更深层的经济交往活动。精准的推广尤为需要。

In light of this opportunity it is an even greater priority for Commonwealth and State governments to increase their focus on tourism and related trade such as education. It is laudable that Tourism Australia has promoted not just the country's outstanding dining scene, but also its related produce, wine, accommodation, transport and tourism industries through the Restaurant Australia campaign. This is one example of well- thought-out cross-promotion, and more needs to be done in this vein. Such promotion should ideally position "Brand Australia" as more than just a tourism destination, highlighting the country's even more economically important role as a provider of services such as education and of high-quality export products.

考虑到这一机会，联邦和各州政府需要更加重视旅游业及相关产业的发展，如教育业等。值得称赞的是，澳大利亚旅游局通过开展“澳洲美厨”活动，不仅提

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升了其餐饮业的知名度，还促进了相关行业，如制造业、酿酒业、住宿业、交通业和旅游业的发展。这是一个跨界营销的成功案例，但仍有进步空间。此类理想的营销应将“品牌澳洲”不仅仅定位为一个旅游胜地，还应强调澳大利亚在教育 and 高质量产品出口方面所发挥的重要经济作用。

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Finally, all of these activities and improvements will need to be built on top of appropriate planning, institutions, regulatory frameworks and infrastructure. Key regulation, particularly for foreign investment, will need to be reviewed in light of a forecast major upswing in demand. We need to avoid the pitfalls that have already occurred when regulatory oversight was not in place, such as in the monitoring of legitimate investment in high-end residential real-estate.

最后，所有这些活动和改进都需要建立在适当的规划、落实机构、监管框架和基础设施之上。需求预计将大幅回升，鉴于此，需要对重要规定、特别是对外商投资的规定进行审查。今后，我们还要避免过去在监管不力情况下已经出现的问题，比如高端住宅房产合法投资中的监管问题。

A wide range of industries will need to take potential future demand from Chinese visitors into account when planning capacity growth, pricing, quality-assurance efforts and so on. And infrastructure will need to keep pace not only with the increased flow of visitors that China is set to provide over the next decade, but also with the massive potential economic activity that it will stimulate as a flow-on effect. 许多行业在规划产能增长、确定定价及保证质量等方面，都需要考虑未来中国旅客的潜在需求。并且，基础设施建设不仅要跟上未来十年内将会增加的中国旅客数量，还要跟上潜在大规模经济活动的步伐，以刺激其产生流动效应。



To respond adequately to this tremendous opportunity, planning efforts will require comprehensive and accurate information about trends in Chinese visits to Australia and demand for associated products, services and investment opportunities. L.E.K. Consulting is committed to deepening the body of knowledge in this area. But this phenomenon cannot be grasped in its totality by just a single firm. It involves Australian business and government in its entirety, and an exceedingly broad range of organisations and institutions will be called upon to study and fully seize the deeper economic potential of Chinese tourism in this country.

为充分应对这一巨大机遇，规划工作需要全面准确地了解中国赴澳旅游的趋势，以及对相关产品、服务和投资机会的需求。艾意凯咨询致力于深化该领域的知识体系。但这一现象不可能仅靠一家公司就能被充分挖掘。它涉及整个澳大利亚的企业和政府，并将召集大范围的组织和机构来研究和充分把握中国旅游业在该国的更深层的经济潜力。

2 million visitors from China annually by 2025

截止 2025 年，每年将有 200 万中国旅客前往澳大利亚

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### Notes

### 注释

<sup>1</sup> In this report, China means mainland China and excludes Hong Kong, Macau and Taiwan; references to Chinese as a language are to Mandarin Chinese.

<sup>1</sup> 此项报告中，“中国”指代中国大陆，不包含香港、澳门和台湾地区；“中文”指代普通话。

<sup>2</sup> “Australia’s Trade in Goods and Services 2014–15,” Australian Department of Foreign Affairs and Trade (DFAT), accessed 6 April 2016, <http://dfat.gov.au/about-us/publications/trade-investment/australias-trade-in-goods-and-services/Pages/australias-trade-in-goods-and-services-2014-15.aspx>.

<sup>2</sup> 《2014-15 年澳大利亚商品及服务贸易》，澳大利亚外交贸易部，2016 年 4 月 6 日数据，<http://dfat.gov.au/about-us/publications/trade-investment/australias-trade-in-goods-and-services/Pages/australias-trade-in-goods-and-services-2014-15.aspx>.

<sup>3</sup> International Visitor Survey, Tourism Research Australia, 2 November 2015. A summary of results from the latest report can be found at “International Visitor

Survey Results,” accessed 11 April 2016, <http://www.tra.gov.au/research/latest-ivs-report.html>.

<sup>3</sup> 国际旅客调查，澳大利亚旅游调查局，2015年11月2日。源自《国际旅客调查》最新报告总结，2016年4月11日数据，  
<http://www.tra.gov.au/research/latest-ivs-report.html>.

<sup>4</sup> The original table lists this as item as “Education-related travel services (c).”

Despite the name, this “includes student expenditure on tuition fees and living expenses.” We have renamed the item for the sake of readability.

<sup>4</sup> 原表中将此项列为“与教育有关的旅行服务”，但其“包括学生学费和生活费”。  
为使其意义更加明确，我们对此进行了重命名。

<sup>5</sup> “Australia’s Trade.”

<sup>5</sup> “澳大利亚贸易”

<sup>6</sup> Australia China Business Council, The 2014 Australia–China Trade Report (2015),  
4.

<sup>6</sup> 澳大利亚中国工商业委员会，2014年中澳贸易报告（2015），4.

<sup>7</sup> Ibid., 3.

<sup>7</sup> 同上处，3.

<sup>8</sup> “Top Ten News of Chinese Tourism Industry in 2015,” China National Tourism

Administration, 4 January 2016,

[http://en.cnta.gov.cn/syhdp/201512/t20151224\\_755626.shtml](http://en.cnta.gov.cn/syhdp/201512/t20151224_755626.shtml).

<sup>8</sup> “2015 年中国旅游十大新闻”，中国国家旅游局，2016 年 1 月 4 日，

[http://en.cnta.gov.cn/syhdp/201512/t20151224\\_755626.shtml](http://en.cnta.gov.cn/syhdp/201512/t20151224_755626.shtml).

<sup>9</sup> International Visitor Survey.

<sup>9</sup> 国际旅客调查

<sup>10</sup> Ibid.

<sup>10</sup> 同上处

<sup>11</sup> Ibid.

<sup>11</sup> 同上处

<sup>12</sup> Ibid.

<sup>12</sup> 同上处

<sup>13</sup> International Visitor Survey data and L.E.K. Consulting analysis.

<sup>13</sup> 国际旅客调查数据与艾意凯咨询分析

<sup>14</sup> International Visitor Survey.

<sup>14</sup> 国际旅客调查

<sup>15</sup> Ibid.

<sup>15</sup> 同上处

<sup>16</sup> The Chinese figure is based on an exchange rate of ¥4.9 to A\$1. The Australian figure gives full-time average weekly ordinary time earnings data from “6302.0 – Average Weekly Earnings, Australia, Nov 2015,” Australian Bureau of Statistics, last updated 25 February 2016, <http://www.abs.gov.au/ausstats/abs@.nsf/mf/6302.0>.

<sup>16</sup> 中方数字是基于人民币兑换澳元的汇率 4.9:1 而得出的。澳方数字来源于澳洲人民每周全职工作收入的数据，“6302.0—平均每周收入，澳大利亚，2015 年 11 月”，澳大利亚统计局，最新更新于 2016 年 2 月 25 日，  
<http://www.abs.gov.au/ausstats/abs@.nsf/mf/6302.0>.

<sup>17</sup> International Visitor Survey.

<sup>17</sup> 国际旅客调查

<sup>18</sup> Jamie Smyth, “Chinese Seek to Boost Investment in Australian Property,” The Financial Times, 10 April 2016, <https://next.ft.com/content/ff0b254c-fecf-11e5-ac98-3c15a1aa2e62>.

<sup>18</sup> Jamie Smyth, “中方寻求扩大对澳大利亚房地产市场的投资”，金融时报，2016年4月10日，<https://next.ft.com/content/ff0b254c-fecf-11e5-ac98-3c15a1aa2e62>.

<sup>19</sup> “Annual Report 2014–15,” Foreign Investment Review Board, accessed 15 April 2016, <https://firb.gov.au/about/publication/annual-report-2014-2015/>; “Annual Report 2013–14,” Foreign Investment Review Board <https://firb.gov.au/about/publication/annual-report-2013-2014/>.

<sup>19</sup> “2014-15 年度报告”，外商投资审查委员会，2016年4月15日数据，<https://firb.gov.au/about/publication/annual-report-2014-2015/>; “2013-14 年度报告”，外商投资审查委员会，<https://firb.gov.au/about/publication/annual-report-2013-2014/>.

<sup>20</sup> Rowan Callick, “China FTA Delivers Early Surge in Trade,” The Australian, 12 April 2016, <http://www.theaustralian.com.au/business/china-fta-delivers-early-surge-in-trade/news-story/268391f0-3d9e5cec2b16f64666c19f58>.

<sup>20</sup> Rowan Callick, “中澳自由贸易协定提前实现贸易激增”，澳大利亚人报，2016年4月12日，

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<http://www.theaustralian.com.au/business/china-fta-delivers-early-surge-in-trade/news-story/268391f03d9e5cec2b16f64666c19f58>.

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