

SPECIAL REPORT

# The China Visitor Economy: Rebuilding Momentum and Unlocking Australia's Full Opportunity

May 2026



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## About L.E.K. Consulting

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## List of abbreviations

Abbreviation	Meaning
ABS	Australian Bureau of Statistics
ACBC	Australia China Business Council
B2C	Business-to-consumer
BITRE	Bureau of Infrastructure and Transport Research Economics
CCI	Consumer confidence index
CY	Calendar year
FIT	Free and independent travellers
FY	Financial year
NPS	Net promoter score
POS	Point of sale
QR	Quick response code
VFR	Visiting friends and relatives

# Foreword

The Australia China Business Council is pleased to partner once again with L.E.K. Consulting on this latest report examining inbound tourism from China, one of Australia's most important service export opportunities.

Nearly a decade on from our previous reports, this research reinforces the value of Chinese tourism as extending well beyond direct visitor spend. Travel plays a unique role in building familiarity, trust and long-term commercial connection between our two countries, driving demand across education, consumer goods, property and investment. This remains a critical, and often underleveraged, driver of Australia's broader economic engagement with China.

At the same time, the market has evolved significantly. Chinese travellers today are more independent, digitally connected and globally mobile than ever before. Expectations around convenience, payments, digital engagement and personalised experiences continue to rise, while competition from regional and international destinations has intensified. While Australia's appeal remains strong, growth can no longer be taken for granted.

Australia remains exceptionally well positioned. Our natural assets, safety, lifestyle and premium experiences continue to resonate strongly with Chinese consumers. However, maintaining competitiveness will require renewed focus and coordination across industry and government.

This report makes clear that the opportunity now lies in reducing friction across the visitor journey, from discovery and booking through to travel, payments and in-country experience. Small barriers matter, particularly as travellers rely more heavily on digital platforms such as Xiaohongshu (RedNote) and WeChat to inform their decisions.

Encouragingly, Australia's core strengths continue to resonate. Visitor satisfaction is high, and travel continues to drive strong follow-on engagement across sectors. The task ahead is to better convert this underlying demand into visitation and long-term economic value.

This report provides a practical roadmap for policymakers, industry leaders and businesses seeking to strengthen Australia's position in one of the world's most dynamic outbound travel markets.

On behalf of ACBC, I thank L.E.K. for their continued partnership and contribution to this important national conversation.



**Rhys Roberts**

**National President**

Australia China Business Council

*Rhys Roberts*

# Context

The first two editions of the Australia-China tourism and trade reports were produced by L.E.K., in collaboration with the Australia China Business Council (ACBC), in 2016 and 2017. These explored direct Chinese tourism expenditure in Australia as well as the broader economic benefits that result from tourism as travellers build wider relationships with Australia – in areas including Australian consumer products, education and investment. These reports also identified key investments required to ensure Chinese visitation to Australia reached its full potential.

This 2026 edition refreshes these perspectives. It provides a market update on the post-COVID-19 rebound in travel from China, including how the shape of tourism has changed, and continues the exploration of the relationships between inbound tourism and other forms of economic participation and investment.

The report identifies opportunities for Australia to remove friction in the tourism experience and unlock additional economic value for the nation.

This year's report draws on the following key sources of insight:

- The previous L.E.K. reports and their underlying data.
- A bespoke consumer survey of 1,500-plus Chinese-citizen respondents who have visited Australia in the past three years, drawn from Tier 1 and Tier 2 Chinese cities. The survey examined visitor motivations; trip behaviour; spend; regional travel; satisfaction and repeat intent; and the impact of visitation to Australia on purchasing of Australian products, investing or studying in Australia, and buying Australian property.
- Targeted consultations with relevant industry groups, airlines and other organisations engaged in Australia-China tourism.
- Analysis of official Australian tourism and trade statistics, alongside relevant inputs from government and public agencies.
- Targeted desktop research to contextualise the rebound, segment dynamics and Australia's competitive position.

# Executive summary

## Key takeaways

- Chinese tourism to Australia has grown consistently since borders reopened in 2022, although holiday visitation remains below historic benchmarks.
- Visitor growth rates are uneven across travel purposes, with student, business and employment travel largely returning to or exceeding historic benchmarks.
- Australia is competing for a smaller pool of Chinese outbound travellers as domestic tourism and short-haul destinations gain share among Chinese tourists.
- Despite this, Australia remains a highly desirable destination for Chinese tourists, students and investors due to its natural assets, safety, education quality, lifestyle and geopolitical stability. Visitor experience on the first trip is also critical, with a significant majority of first-time visitors intending to return.
- The profile of the typical Chinese visitor to Australia has rapidly evolved, with younger travellers in particular more comfortable with travelling independently. Consequently, participation in traditional, large group tours is declining.
- Tourism delivers broader economic benefits beyond visitor spend, influencing purchases of Australian goods and services as well as education, property and investment decisions. Importantly, the impact of visitation on the purchasing of Australian goods and services has increased, due to the evolution of channels to market in China.
- While Australia has made significant progress in improving the visitor experience, further opportunities exist, particularly through addressing language barriers.

Chinese tourism to Australia is entering a new phase, characterised by a positive growth outlook, changing tourist behaviours, and continued links between trade and other forms of economic activity.

Tourist visitation is strong. Australia hosted over 1 million Chinese tourists in 2025. Business and student travel has largely returned to the pre-COVID trajectory. Leisure tourism visitor volumes have grown strongly in the past two years and have a strong forward outlook but remain at approximately 60% of 2017 levels.<sup>i</sup>

Chinese leisure tourist travel habits have changed, impacted by a Chinese government push to increase domestic tourism. Consumer confidence in China is generally weaker, although less so in the high-income, Tier 1 or 2 city cohorts who typically come to Australia. At the same time, a stronger Southeast Asian tourist proposition has increased competition for Chinese international tourist activity. As a result of this, Australia's share of Chinese international trips declined from 1.5% in 2017 to 1.2% in 2025.<sup>ii</sup> Nonetheless, Australia remains among the top long-haul destinations for Chinese tourists, reflecting the nation's strength as a destination.

Despite this, brand Australia remains very strong with travellers. Australia's defining features — natural landmarks like the Great Barrier Reef and Uluru, beaches, and natural landscapes — continue to resonate powerfully. International students (and parents) continue to recognise the quality of Australia's education, safety and quality of life. Recent visitors to Australia are overwhelmingly positive about their experience, and 75% of first-time visitors in the past four years consider themselves likely or highly likely to visit again.<sup>iii</sup>

Importantly, the profile of the typical Chinese visitor to Australia has evolved quickly in recent years. The visiting population has become younger and more willing to travel independently, using Xiaohongshu and WeChat to research popular destinations. Social media and the internet are the most common means for researching travel to Australia. Internet resources have made it easier for Chinese travellers to plan and book travel independently, reducing reliance on booking group tours through outbound agents and increasing itinerary diversity.

Australian consumer goods are somewhat less present in the Chinese business-to-consumer (B2C) zeitgeist following the decline of the informal "daigou" shopper channel. Since we first ran this survey in 2016, the share of respondents who have knowingly bought Australian goods has declined from 73% to 40%. Travel to Australia still has a clear causal link to buying "Australian", with purchases of Australian goods and services rising by 88% after visiting.<sup>iv</sup>

The same is true with education, real estate and business investment, as 82% of survey respondents who own property in Australia were influenced by visiting.<sup>v</sup>

Australia has made progress on the experience for Chinese visitors, particularly through wider adoption of digital payment infrastructure familiar to Chinese visitors. Further work is needed to reduce friction and improve visitor experience, with language barriers remaining the most commonly cited challenge.

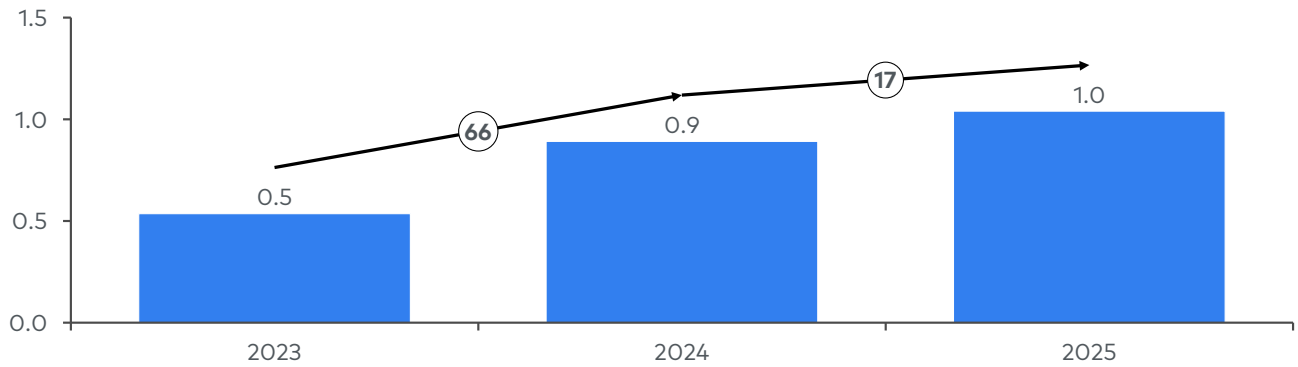
Overall, Australian tourism remains an extremely compelling product for Chinese tourists, and one with demonstrable secondary economic benefits across a range of areas. However, the elements that previously sustained growth (brand marketing supported by cheap aviation capacity and inbound tour operators) are increasingly insufficient for the new market reality. Chinese travellers have a growing array of holiday options at home and nearby and are increasingly sophisticated in their search and planning abilities. Australia needs to continue to develop its branding and distribution — in the channels that matter most to tourists, e.g. social media — to make the most of its appeal to Chinese visitors.

# Market dynamics

## Visitation levels have now reached the 'new normal'

Australia is an important destination for Chinese tourists. Australia hosted over 1 million tourists from mainland China in 2025, representing a 17% increase over 2024 (Figure 1).<sup>vi</sup> Chinese visitors also remain among the highest-spending international cohorts, with in-Australia expenditure reaching \$11.2 billion in 2025, contributing one-quarter of all short-term international visitor spending in Australia.<sup>vii</sup>

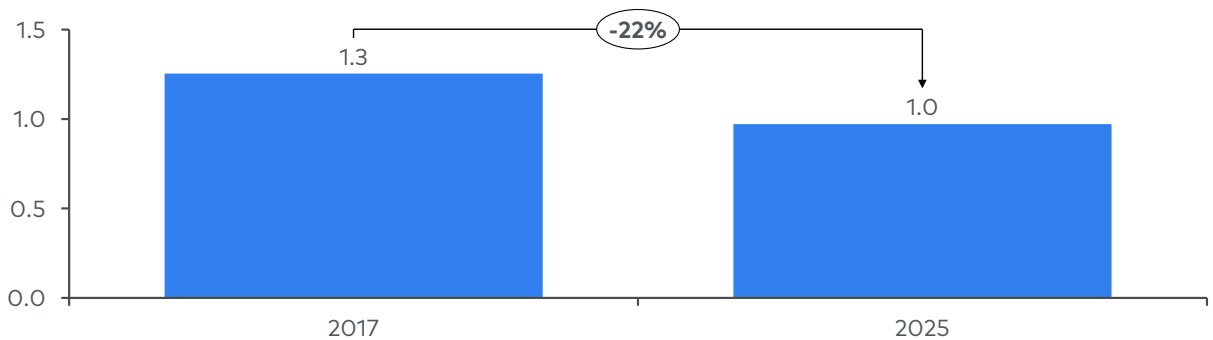
**Figure 1**  
Number of Chinese visitors to Australia (CY23-CY25)  
Millions of visitors



Source: Overseas Arrivals and Departures, Australia, Australian Bureau of Statistics, reference period April 2026, released 12 June 2026

Total visitation remains down compared with the years leading to COVID – a high point in Australia-China tourism. Visitor numbers in 2025 were approximately 78% of 2017 levels, the last year in which we prepared this report, with holiday travel the main remaining gap, at only 60% of 2017 visitation levels (Figure 2).<sup>viii</sup>

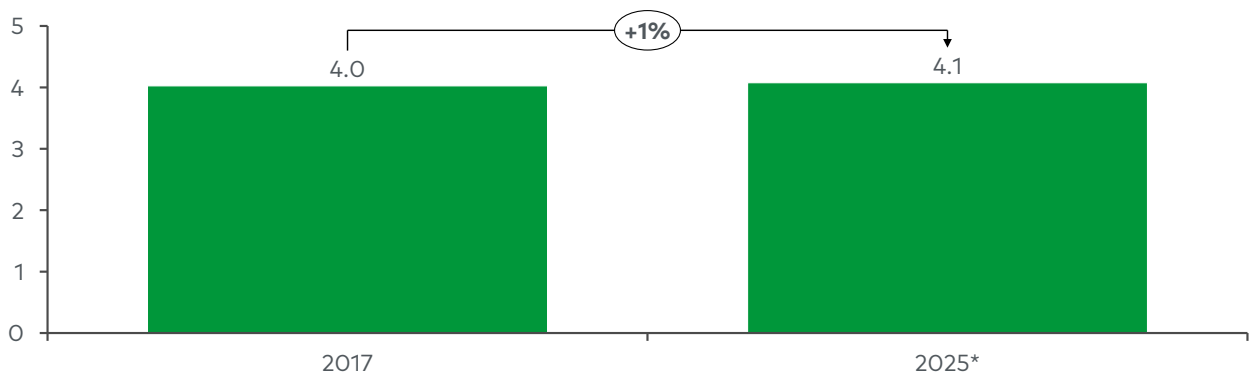
**Figure 2**  
Number of Chinese visitors to Australia (CY17, CY25)  
Millions of visitors



Note: Visitor data for visitors aged 15+  
Source: Tourism Research Australia, International Visitors Survey, YE December 2025

Aviation capacity between China and Australia is strong. Aviation capacity and demand are closely linked: flight availability determines the ability for visitors to travel to Australia, while sustained demand supports route reinstatement. The number of seats supplied by Chinese airlines has approximately returned to 2017 levels (Figure 3).<sup>x</sup> The return of China Southern Airlines, historically the largest carrier operating between Australia and China, across all Australian capital cities (excluding Hobart and Canberra), signals continued momentum in the recovery of aviation capacity and further growth in Chinese inbound visitation.

**Figure 3**  
Chinese airline seats to/from Australia (CY17, CY25)  
Millions of seats



Note: Data for 2025 is to November 2025. December 2024 has been used as a proxy for December 2025.  
Source: Bureau of Infrastructure and Transport Research Economics; L.E.K. research and analysis

### Fewer Chinese are travelling internationally, and those who are prefer short-haul destinations

Australia is competing for a marginally smaller pool of international Chinese travellers, with outbound travel in 2025 remaining below 2017 levels. Meanwhile, Australia's share of Chinese international trips declined from 1.5% in 2017 to 1.2% in 2025.<sup>x</sup>

Since 2022, there has been a strong resurgence in domestic tourism in China, increasing competition for Chinese holiday travellers. The Chinese government has invested significantly in building tourist-ready infrastructure and introducing specific measures to increase in-country consumption, for example, interest-free personal consumption loans and the addition of two public holidays starting in 2024. These measures have resulted in Chinese domestic trips increasing from 6 billion in 2019 to 6.5 billion in 2025.<sup>xi</sup>

At the same time, outbound travellers are favouring short-haul markets that are more affordable and easier to access. Asian and Southeast Asian destinations have been key beneficiaries of this demand through visa-free or simplified entry arrangements, competitive pricing and strong flight connectivity, capturing over 50% of Chinese trips abroad.<sup>xii</sup> Singapore and Malaysia offer reciprocal visa-free agreements for short-term stays, while Vietnam and Indonesia have on-arrival and electronic visa arrangements. Extensive air connectivity between China and city and resort destinations throughout Southeast Asia has supported continued growth in demand for these destinations.

Against this background, Australia remains a highly aspirational and competitive long-haul destination for Chinese travellers. However, it is an expensive destination: industry stakeholders highlight elevated post-COVID airfares, slower recovery in aviation capacity compared with regional markets and a strong Australian dollar as potential drags on tourist numbers. Softer macroeconomic conditions in China, including pockets of slower growth and weaker aggregate consumer confidence — the Consumer Confidence Index (CCI) is below the neutral level of 100 vs 109-125 in 2017 — is creating a more cautious discretionary spending environment for some cohorts, even though confidence in mid-to-high income earners in Tier 1 and 2 cities remains high.<sup>xiii</sup>

## Chinese travel to Australia is changing

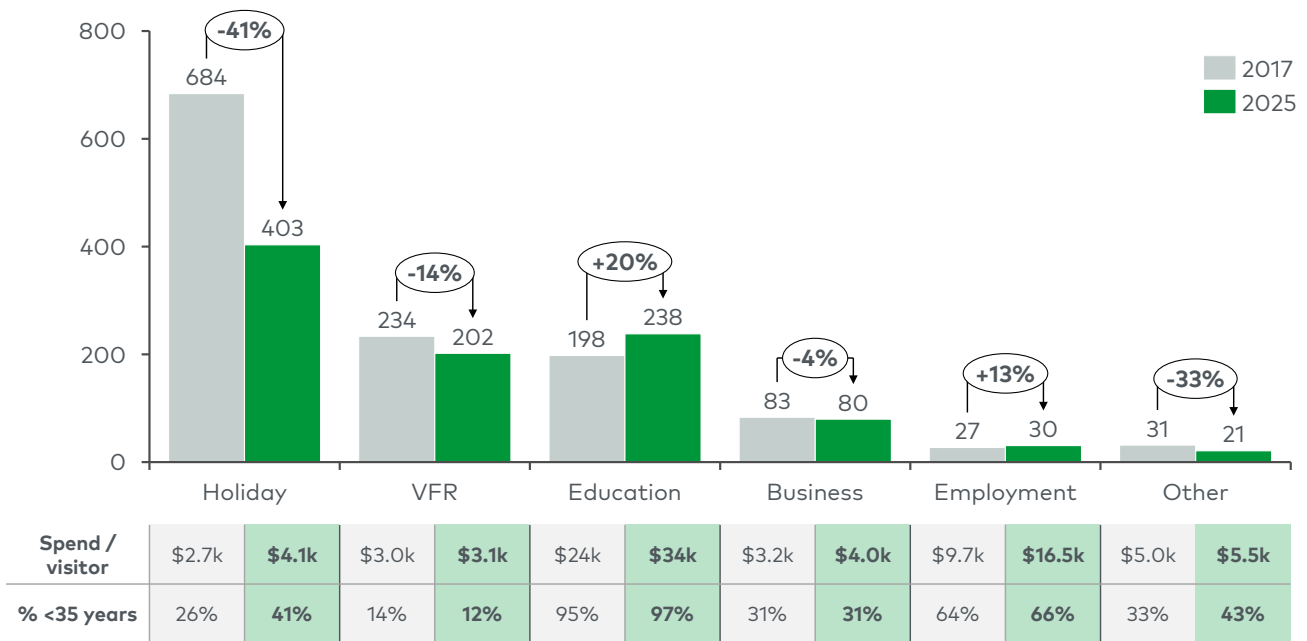
Recent changes in Chinese visitation to Australia have been uneven across travel segments. Business and employment-related travel — which accounted for 12% of total visitors in 2025 — reached 96% and 113% of 2017 volumes, respectively, in 2025. This may partly reflect a 'catch-up' in travel of arrivals delayed during COVID due to border closures.

Visiting friends and relatives (VFR) and education travel, which together represent roughly half of all visits, have rebounded faster, to around 86% and 120% of 2017 levels, respectively.

Holiday travel, which represents the largest share of visitation (around 40% of 2025 visitors), is continuing to grow with aviation capacity, but is still down from 2017 (Figure 4).<sup>xiv</sup>

**Figure 4**

Comparison of Chinese visitor numbers to Australia, by primary travel purpose (CY17, CY25)  
Thousands of visitors

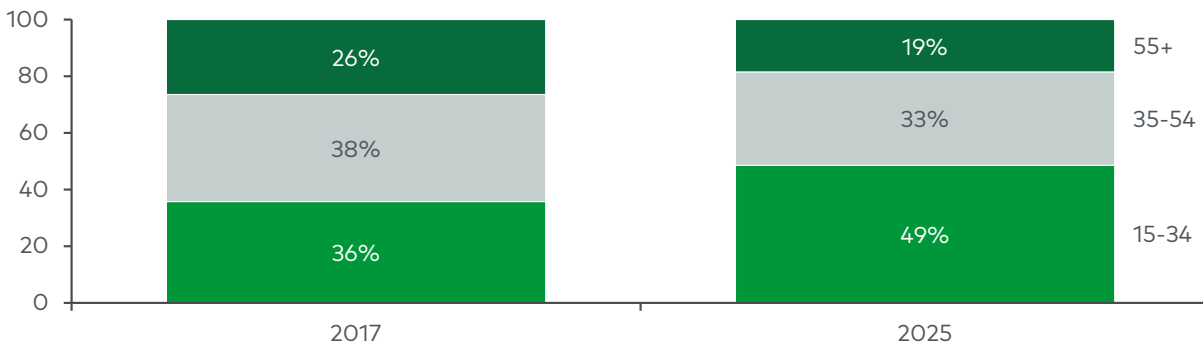


Note: Visitor data for visitors aged 15+  
Source: Tourism Research Australia; L.E.K. research and analysis

The profile of the Chinese holiday traveller segment is also changing. Post-COVID holiday visitors are on average younger and higher-spending. The proportion of Chinese holidaymakers in the <35 cohort has increased from 26% in the 2017 calendar year (CY) to 41% in 2025 (Figure 5), while average spend per visitor has increased from \$2,700 to \$3,800.<sup>xv</sup> This shift suggests that the recovery to date is being driven by higher-value travellers, with broader mass-market holiday demand yet to fully return. This dynamic is discussed further below.

**Figure 5**

Age breakdown of Chinese holiday visitors (CY17, CY25)  
Percentage of visitors



Note: Visitor data for visitors aged 15+  
Source: Tourism Research Australia, International Visitors Survey, YE December 2025

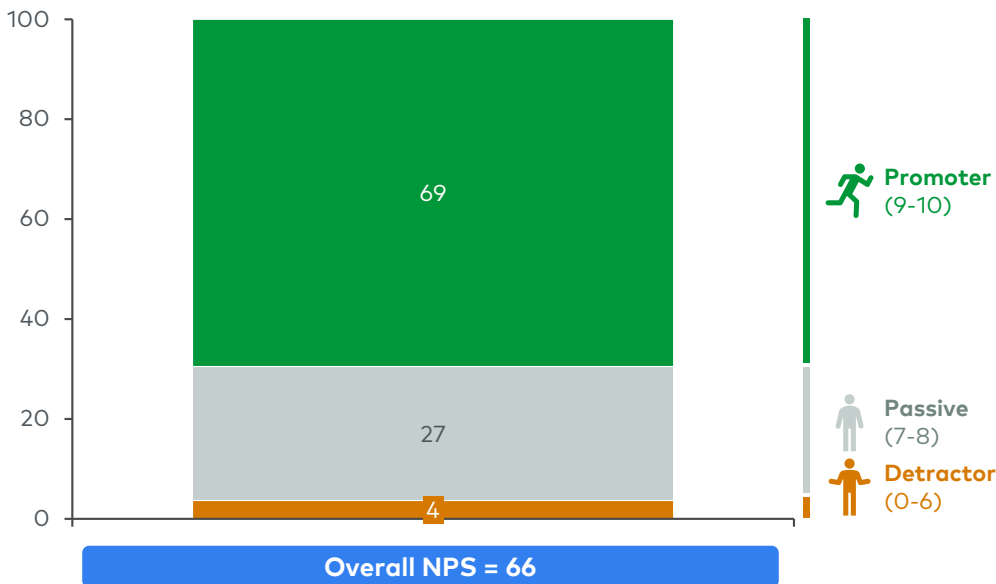
# Chinese inbound tourism and traveller sentiment

## Chinese visitor perceptions of Australia remain extremely strong

Australia continues to enjoy strong positive perceptions among Chinese visitors, providing a solid anchor for the recovery of holiday travel. Our survey of 1,500-plus Chinese visitors found overwhelmingly positive sentiment towards their visit to Australia, with a net promoter score (NPS) of 66 (Figure 6).<sup>xvi</sup> Only 4% of respondents were classified as detractors, pointing to a very small share of visitors who would not recommend Australia as a destination.

**Figure 6**

How likely are you to recommend Australia to another person? (0 – not at all likely, 10 – extremely likely) (February 2026)  
Percentage of respondents

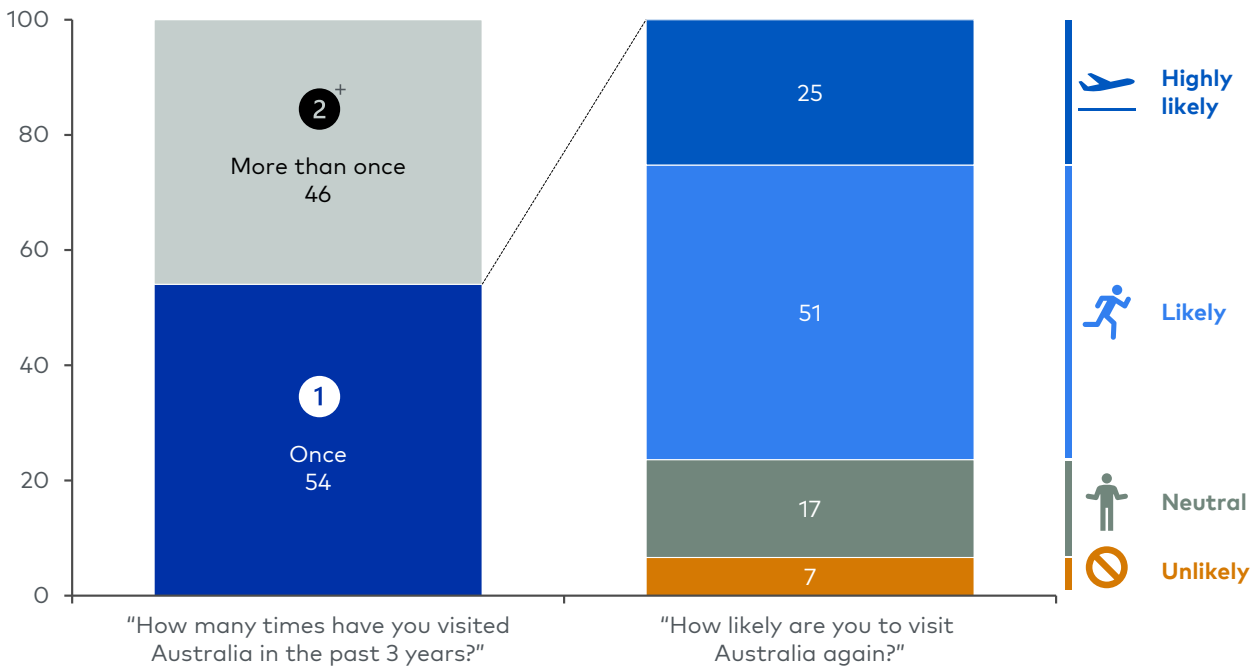


Notes: Net Promoter Score (NPS) is calculated by subtracting the percentage of Detractors (scores 0-6) from the percentage of Promoters (scores 9-10), Passives (7-8) are excluded from the final percentage calculation, i.e., NPS = % promoters - % detractors  
Source: L.E.K. Survey, questions: Q24, On a scale of 0-10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend Australia to another person?

Australia is firmly within the consideration set for long-haul travel: 46% of Chinese tourists surveyed as part of Tourism Australia’s Consumer Demand Project in 2025 were considering a trip to Australia within the next four years, compared with 30% from the U.S. and 34% from Japan, and 25% were actively planning their trip.<sup>xvii</sup> Australia also inspires strong repeat visitation. Nearly half of surveyed tourists reported making more than one trip to Australia in the past three years. Among the remaining 54% who had visited once in that period, a further 76% indicated they were likely or very likely to return, while only 7% said they were unlikely to visit again (Figure 7).<sup>xviii</sup>

**Figure 7**

Number of trips to Australia in past three years and future travel intention (February 2026)  
 Percentage of respondents



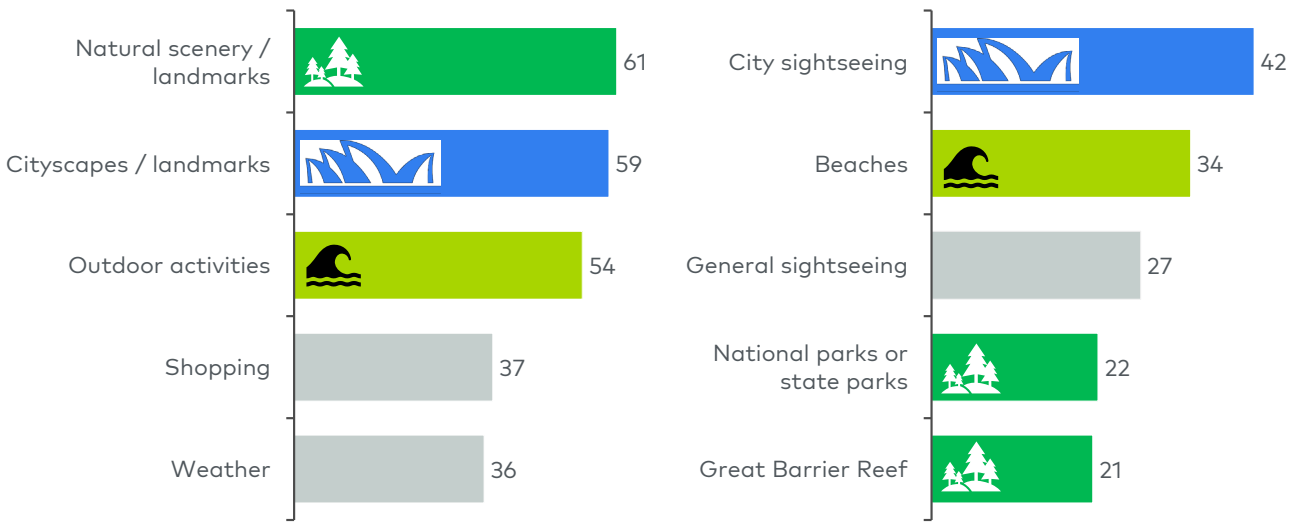
Source: L.E.K. Survey, questions: Q17, How many times have you visited Australia in the past 3 years, including your most recent visit?; Q18, How likely are you to visit Australia again?

**Australia’s natural amenities and cityscapes are key draws**

Australia’s natural landscapes, city scenes and lifestyle experiences are the defining draws for Chinese holidaymakers. Survey respondents cite natural scenery (61% of respondents), city landmarks (59%) and outdoor activities (54%) as the top three reasons for choosing to visit Australia (Figure 8).<sup>xix</sup> These factors distinguish Australia from other long-haul destinations, with shopping and weather rounding out the top five motivations for travel.

**Figure 8**

Australia key destination differentiators and memorable visitor experiences (top five) (February 2026)  
 Percentage of respondents (holidaymakers)



What differentiated Australia from other long-haul options?

Which aspects of your trip to Australia were the biggest positives / most memorable?

Source: L.E.K. Survey, questions: Q13, What differentiated Australia from other long haul destination options?; Q25, Which aspects of your trip to Australia were the biggest positives / most memorable?

These preferences are consistent across age groups, suggesting wide appeal across the Chinese holiday visitor market. Travellers aged 25-64 report similar motivations for visiting Australia, while older visitors (65+) over-index slightly on natural scenery and city landmarks.<sup>xx</sup>

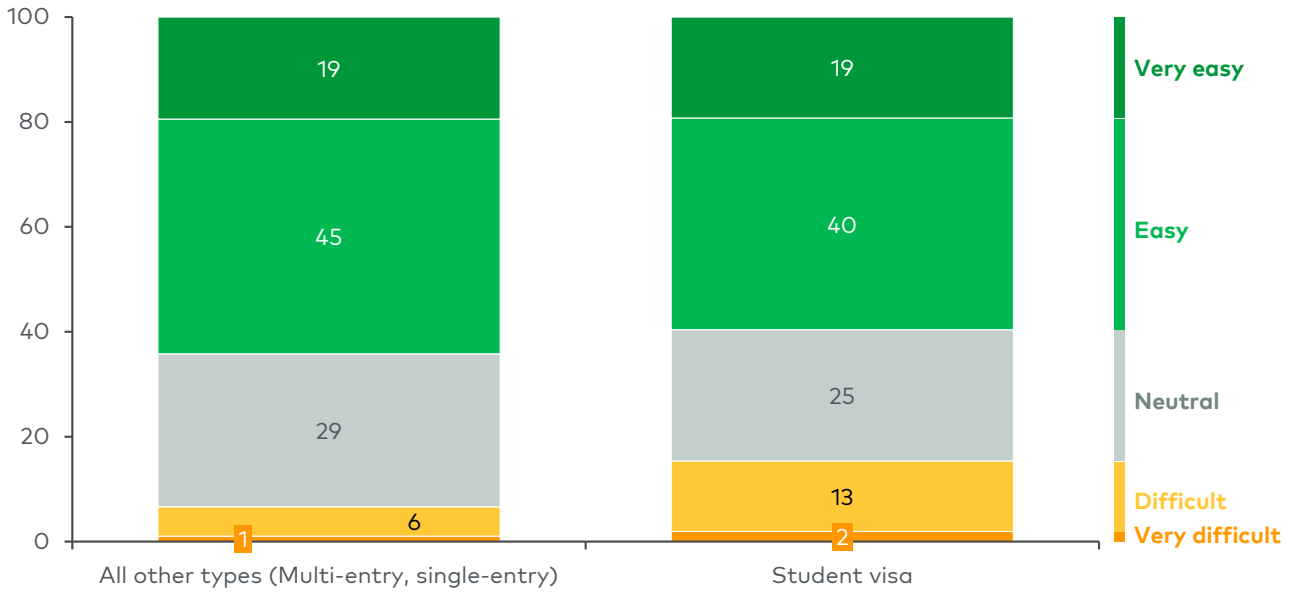
Australia’s tourism branding has historically reinforced these natural and lifestyle strengths. Recent international campaigns such as Tourism Australia’s ‘Come and Say G’Day’ campaign highlight landscapes including Uluru, the Great Barrier Reef and the Twelve Apostles, alongside the Sydney Harbour skyline. These campaigns also emphasise Australia’s wildlife, featuring animals such as emus and turtles, with the anthropomorphic Ruby the Roo the central campaign mascot. Recent campaigns have been more localised, with Ruby appearing alongside market-specific celebrities such as Chinese actor Yosh Yu for China.<sup>xxi</sup>

### Accessing Australia is easy – across visa options and air connectivity

While Australia does not offer the same visa-free or visa-on-arrival access as many Southeast Asian destinations, the visa process itself is generally not perceived by Chinese visitors as a major barrier. More than 60% of surveyed respondents travelled on a multi-entry visa, including 55% of holiday visitors, reflecting the prevalence of longer-duration visas among repeat travellers.<sup>xxii</sup> Across all visa categories, most respondents described the visa application

process as straightforward; 90% reported that obtaining a visa was not difficult. Respondents found the student visa process to be the most complex, although even in this category only around 15% of respondents rated the process as difficult (Figure 9).<sup>xxiii</sup>

**Figure 9**  
 Difficulty of obtaining a visa for Australia (February 2026)  
 Percentage of respondents



**How would you rate your personal experience with the visa application process in terms of its overall difficulty?**

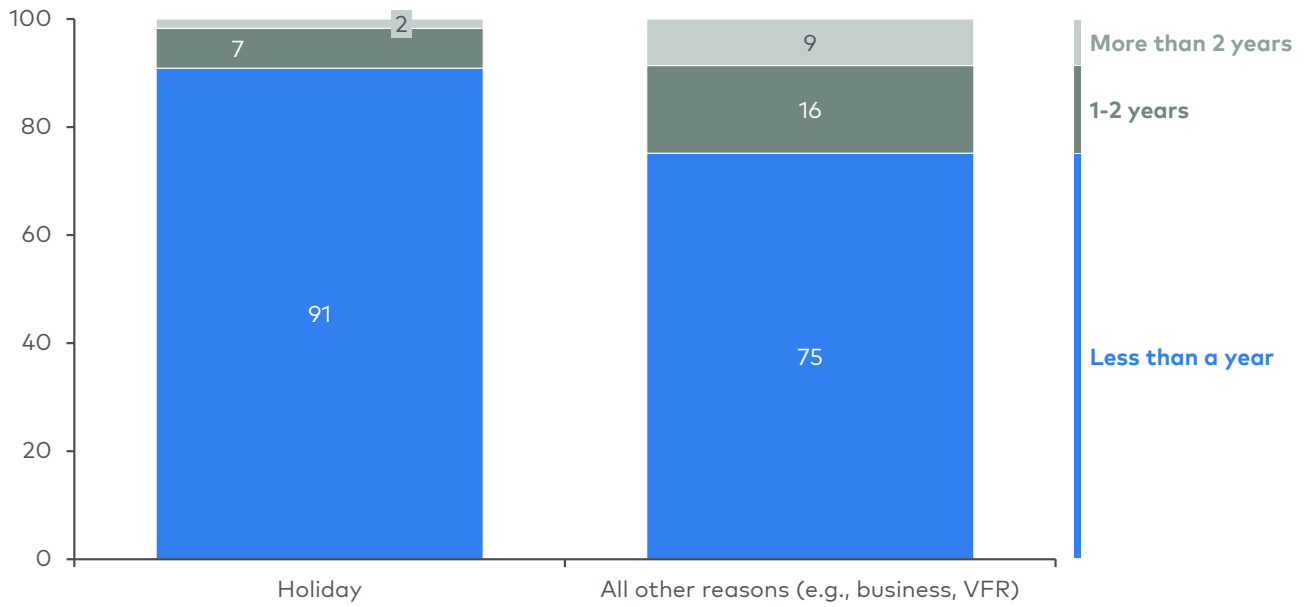
Source: L.E.K. Survey, questions: Q3, On your most recent visit, what visa did you use to enter Australia? Crosstab by Q7, How would rate your personal experience with the visa application process in terms of its overall difficulty?

Most travellers apply for a visa around the time they begin planning their trip, typically within 12 months of travel. Survey responses indicate that 91% of holidaymakers start considering a visit less than a year in advance, while those travelling for other purposes tend to plan further ahead (Figure 10).<sup>xxiv</sup>

Chinese travellers have historically had short lead times for booking their trips. Industry feedback suggests that this lead time has declined further – in some instances as little as two weeks before leaving. This shift could reflect the growing prevalence of FIT (free and independent travellers) who are comfortable researching and committing to travel at the last minute, once their Australian visa is confirmed.

**Figure 10**

Timing of trip planning for Australia (February 2026)  
Percentage of respondents



**How far in advance of your last trip did you start thinking about travelling to Australia?**

Source: L.E.K. Survey, questions: Q1, What was the primary purpose of your most recent visit to Australia? Crosstab by Q10, How far in advance of your last trip did you start thinking about travelling to Australia?

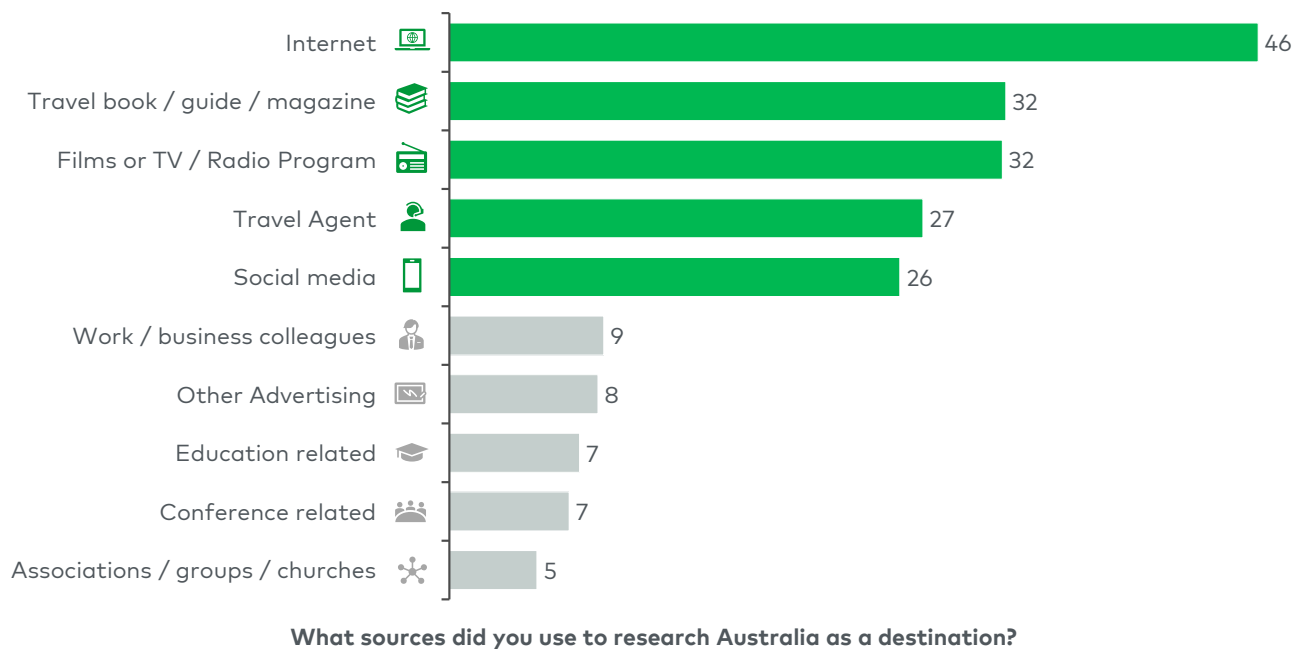
# Visitation outlook and opportunities

## Chinese travel behaviours will continue to shift towards free and independent travel

Chinese travel behaviours are continuing to evolve, with trip planning increasingly shaped by digital platforms and online content. Around 46% of surveyed visitors use the internet as their primary source of information when researching Australia as a destination, followed by travel guides, traditional media such as film and television, and travel agents.<sup>xxv</sup> This pattern is consistent across all age groups, highlighting the influence of digital channels on travel decisions by Chinese visitors.

Social media-style internet platforms appear to be rising in importance, with Xiaohongshu and WeChat increasingly serving as means for travel inspiration, itinerary planning and destination awareness among Chinese travellers (Figure 11).<sup>xxvi</sup>

**Figure 11**  
Sources used to research Australia as a destination (five top and five bottom sources) (February 2026)  
Percentage of respondents (holidaymakers)



Source: L.E.K. Survey, questions: Q12, What sources did you use to research Australia as a destination?

## Chinese social media: An explainer



Xiaohongshu (RedNote) is a key Chinese lifestyle and travel discovery platform with over 300 million monthly active users and has become an important channel for destination discovery among Chinese travellers. User-generated travel posts frequently elevate lesser-known locations into viral must-visit destinations. The platform is particularly influential among younger consumers, with over 50% of users born after 1995.

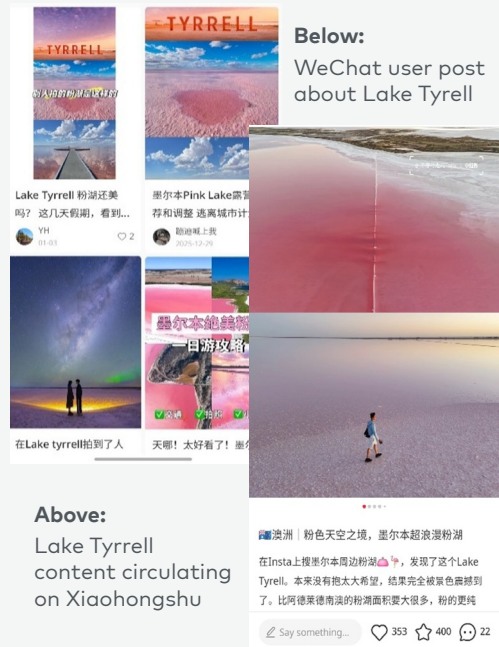


WeChat is a social media service that combines posting, messaging, voice chat, video calling and payment services in a single platform. It plays a significant role in the Chinese travel ecosystem, serving as a primary platform for information sharing, travel planning and peer recommendations through official accounts, group chats and mini-programs used by tourism operators and destinations. It is more widely used across older cohorts.

### Case study: A viral revival

Lake Tyrrell in regional Victoria is a salient example of the viral reach of Xiaohongshu and WeChat. The lake gained significant popularity on Chinese social media, where travellers highlighted its mirror-like salt flats and exceptional stargazing conditions in a region with very low light pollution, between 2014 and 2016 (and remains popular today). Posts often refer to the site as the 'Sky Mirror', reflecting the lake's ability to mirror the sky during sunrise, sunset and clear nights.

The viral attention generated a surge in visitation, with local operators reporting that Chinese visitors make up 90% of guests, reaching peak volumes of 1,000 tourists a day. The influx of travellers led to the development of additional tourism infrastructure, including a new viewing platform known as the Sky Lounge in 2020 and expanded visitor information services in the nearby town of Sea Lake. This is to support projected visitation growth from c.42,000 pre-COVID to c.200,000 annually by 2025 and beyond.<sup>xxvii</sup>



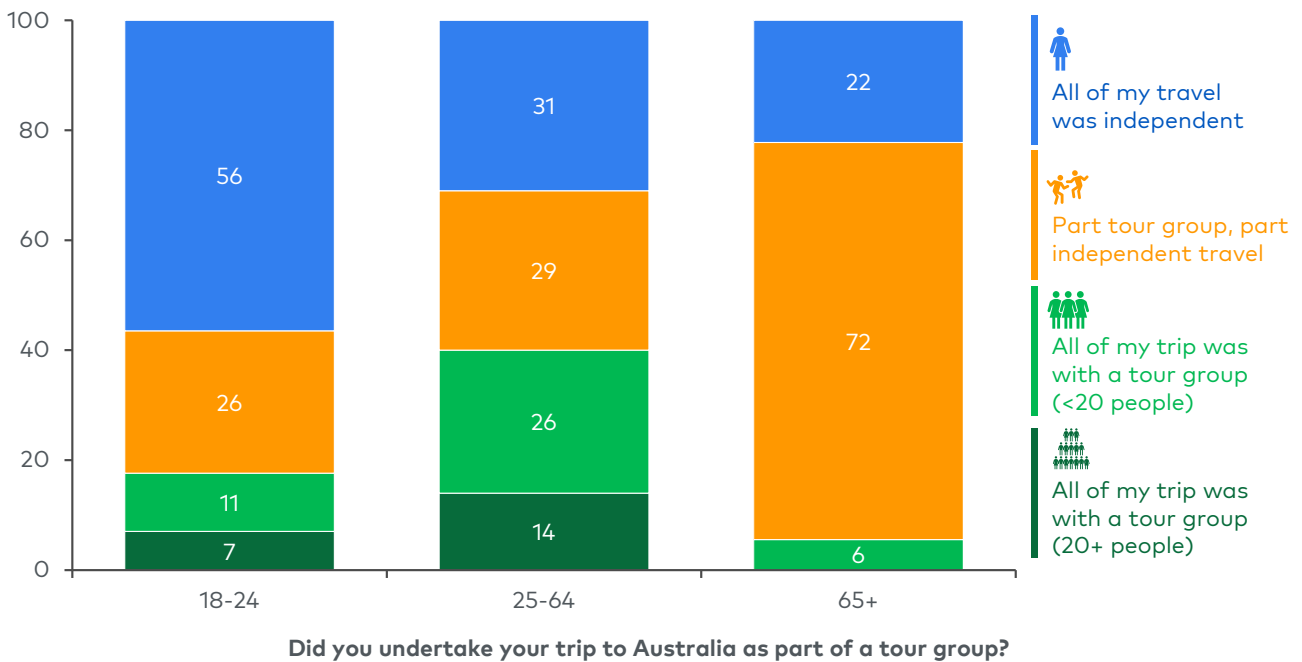
Below:  
WeChat user post about Lake Tyrrell

Above:  
Lake Tyrrell content circulating on Xiaohongshu

Brand Australia must maintain a strong digital presence in Chinese-language channels to continue reaching prospective travellers at the point of discovery and planning. Destination marketing, visitor information and tourism content increasingly need to be accessible through the platforms Chinese travellers use most frequently. Partnerships with key Chinese digital platforms, influencers and travel agencies should be explored as important mechanisms for promoting Australian destinations and experiences.

The structure of travel itself is also changing. Since 2017, the share of Chinese holiday visitors arriving in Australia as part of a tour has nearly halved — from 47% to 26%.<sup>xxviii</sup> The prevalence of fully packaged group tours in particular has declined, predominantly among younger travellers. While approximately 70% of visitors still participate in some form of tour, younger travellers aged 18-24 skew strongly towards independent travel. Among travellers aged 25-64, around 40% still undertake fully guided tours (albeit with a preference towards smaller groups) (Figure 12).<sup>xxix</sup>

**Figure 12**  
Travel by tour format (February 2026)  
Percentage of respondents

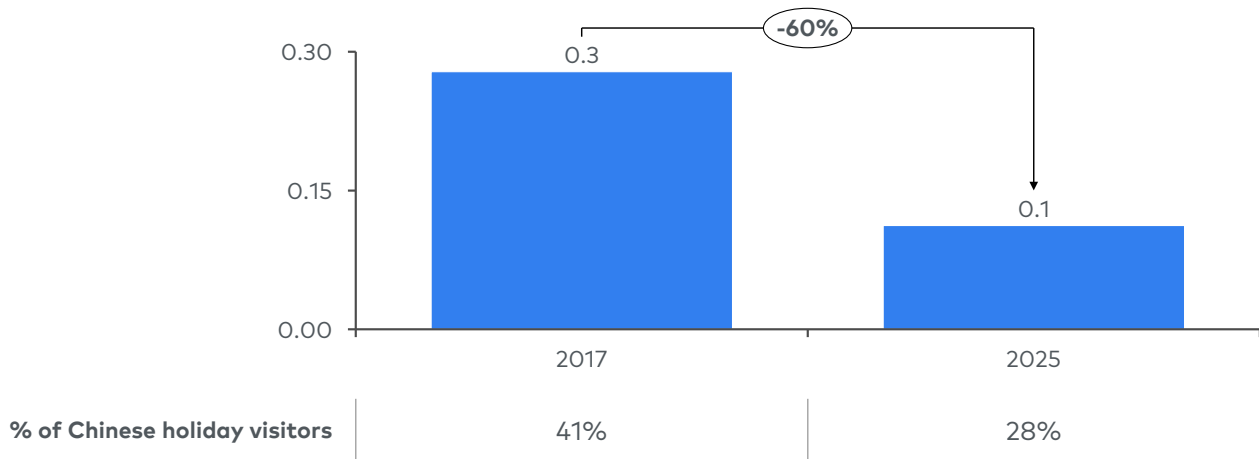


Source: L.E.K. Survey, questions: S6, What is your age? Crosstab by Q15, Did you undertake your trip to Australia as part of a tour group?

Despite this shift, intermediaries remain an important distribution channel, with more than 80% of visitors booking their trip through travel agents or other third-party services, compared with only 12% booking directly.<sup>xxx</sup>

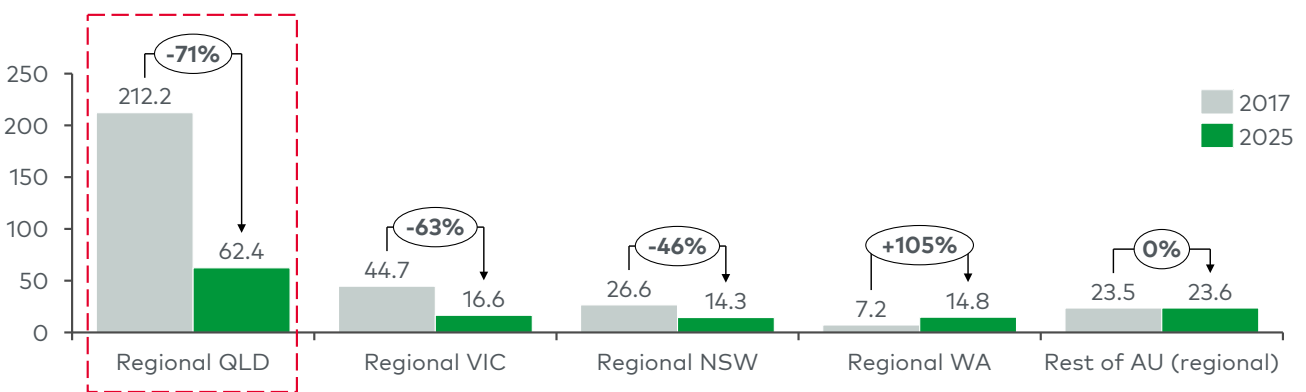
Despite an overall strong visitor outlook, Chinese tourism to regional areas of Australia has recently been an ongoing challenge point. In the 2025 financial year (FY), the number of international visitors travelling to regions outside capital cities and the Gold Coast reached only c.40% of 2017 levels and represented only 22% of 2025 total Chinese holiday visitors (Figure 13).<sup>xxxii</sup> This lag is primarily driven by the slow recovery of key regional destinations, particularly in Queensland (e.g. Cairns), which has experienced the weakest rebound in visitor volumes relative to 2017, partially due to natural disasters including bushfires, storms and flooding which have limited travel (Figure 14).<sup>xxxiii</sup> Key reasons cited by holidaymakers for not travelling beyond major cities include limited time (65%) and safety concerns related to wildlife and extreme weather (55%).<sup>xxxiii</sup>

**Figure 13**  
Chinese holiday visitors to regions outside of capital cities and the Gold Coast (CY17, CY25)  
Millions of visitors



Source: Tourism Research Australia, International Visitors Survey, YE December 2025

**Figure 14**  
Chinese holiday visitors to regions outside of capital cities and the Gold Coast, by state (CY17, CY25)  
Thousands of visitors



Source: Tourism Research Australia, International Visitors Survey, YE December 2025

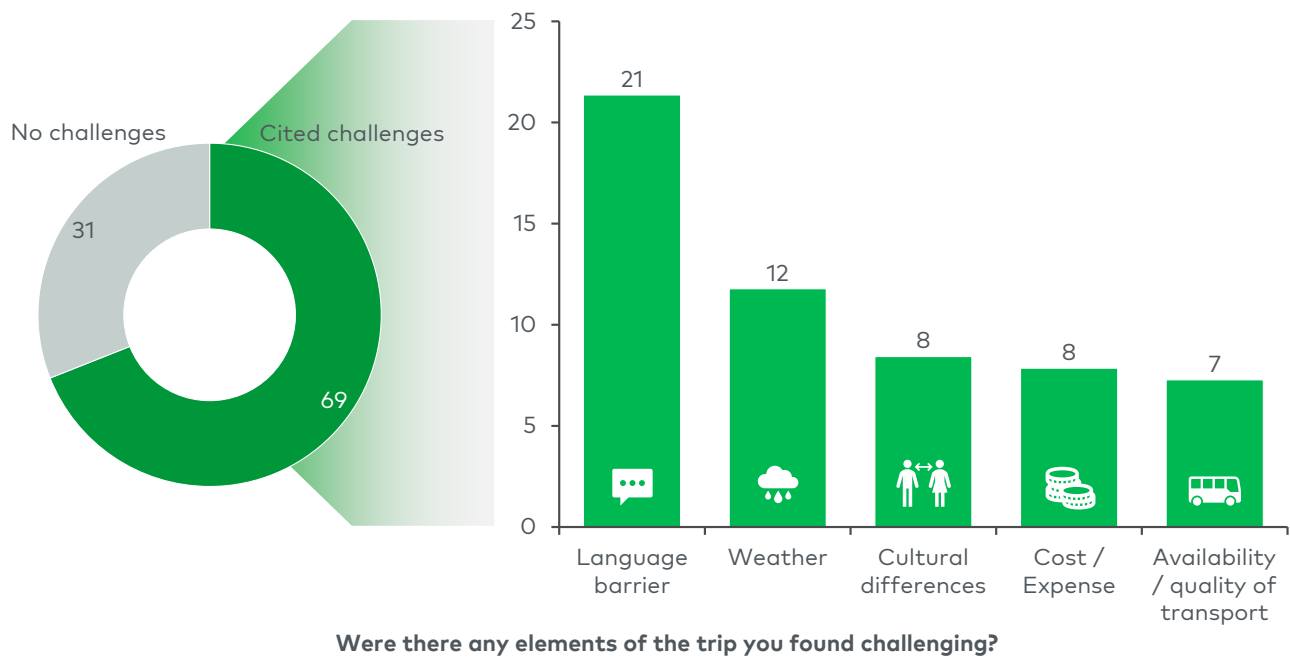
### Opportunities remain to improve the visitor experience

Since our more recent edition of this report in 2017, Australia has continued to refine its tourism offering for Chinese visitors. A notable area of progress has been the rollout of familiar payment infrastructure such as quick response code (QR)-based payments from Alipay and WeChat pay. Major Australian banks such as Commonwealth Bank and National Australia Bank have partnered with Alipay to integrate QR-based payments into local point of sale (POS) systems; however, retailers and hospitality venues have been slow to adopt these systems.<sup>xxxiv</sup> The widespread adoption of QR code technology during the COVID-19 pandemic has further supported this transition, particularly in settings such as cafés, restaurants and retail locations where speed and convenience are important for visitors.

Opportunities remain to further improve the visitor experience. Around 70% of surveyed travellers reported encountering some challenges during their visit, with language barriers cited most frequently (21%), followed by weather conditions (12%) and cultural differences (8%) (Figures 15).<sup>xxxv</sup>

**Figure 15**

Challenges encountered by Chinese visitors during their trip to Australia (February 2026)  
Percentage of respondents



Notes: L.E.K. has translated and grouped answers into key themes  
Source: L.E.K. Survey, questions: Q26, Were there any elements of the trip that you found challenging?

Improved Mandarin wayfinding, Chinese-language signage and access to Mandarin-speaking guides at major tourist attractions could help address these barriers, particularly as 62% of Chinese leisure travellers now include an independent travel component. International students have often informally filled this role by assisting visiting friends, relatives and tour groups with language and navigation support. Clearer information on local conditions and travel expectations, delivered through digital channels or travel agents, could also help mitigate some of these challenges.

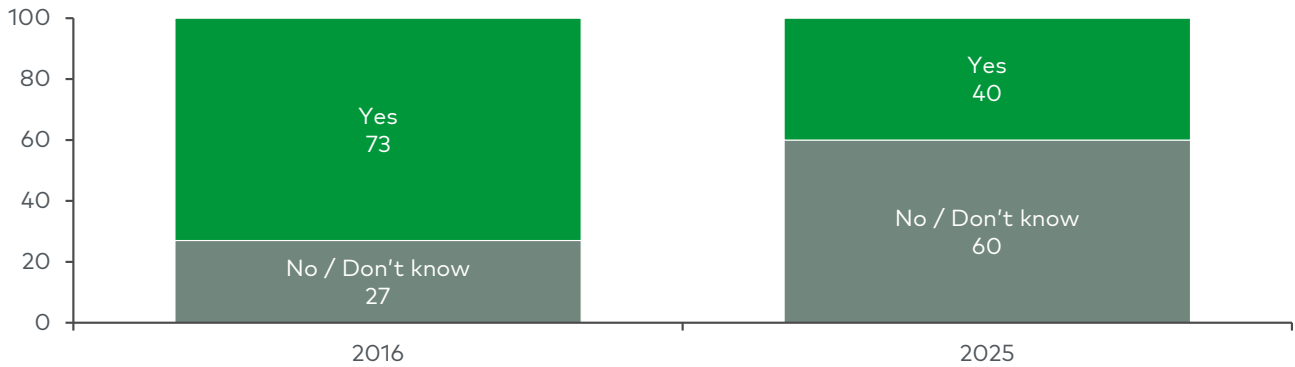
# How tourism influences China's trade with Australia

## Travel to Australia strengthens purchasing of Australian goods and services

Australian consumer goods continue to act as both an important gateway to and a key beneficiary of visitation. Around 80% of surveyed visitors indicated that prior exposure to Australian products — in particular dairy products, wine and beef — influenced their decision to visit Australia, highlighting the importance of consumer goods in shaping destination awareness.<sup>xxxvi</sup>

However, Chinese awareness and consumption of Australian goods prior to travelling appear to be in decline. In 2025, 40% of survey respondents had purchased Australian goods prior to travelling, down from 73% in our 2016 survey.<sup>xxxvii</sup> This suggests that fewer Chinese travellers are arriving already familiar with Australian products, increasing the importance of the visit itself in driving product use and purchase (Figures 16-18).<sup>xxxviii</sup> While the lack of travel to Australia during COVID may have reduced the level of advocacy for Australian goods in China, we can point to additional two factors to explain this change. The daigou channel — where shoppers import goods directly into China in their luggage or by mail from overseas — historically played an important role in distributing Australian consumable goods into China. This was particularly relevant for luxury goods and products such as baby formula and health supplements; Australian regulations and standards made them highly desirable among Chinese consumers. This channel has undergone significant transformation since COVID, with reduced international travel disrupting the informal networks of personal shoppers (often international students or migrants) who purchased goods overseas to resell to consumers in China. Simultaneously, many Australian brands have shifted towards official cross-border ecommerce channels (e.g. Tmall Global, Douyin, JD.com), while evolving Chinese regulatory settings have increased scrutiny of informal import channels.<sup>xxxix</sup>

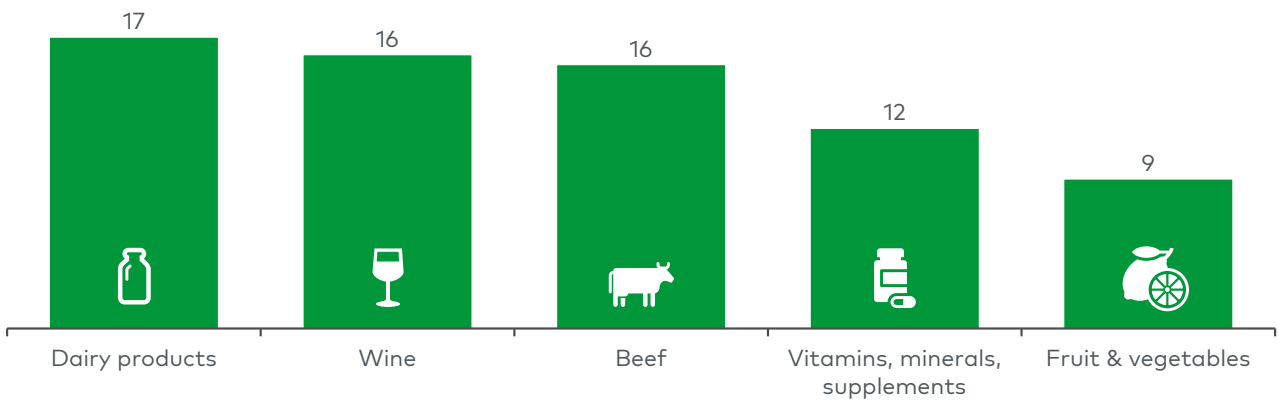
**Figure 16**  
Purchase of Australian goods (2016, 2026)  
Percentage of respondents



**Did you buy Australian-made or sourced goods and services in China prior to your first visit?**

Source: L.E.K. Survey, questions: Q27, Did you buy Australian-Made (or sourced) goods and services in China prior to your first visit to Australia?;

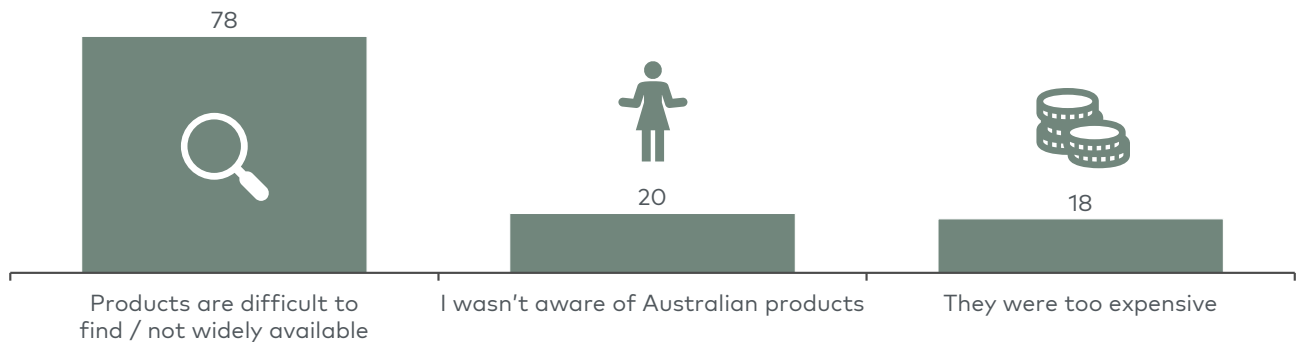
**Figure 17**  
Goods purchased (February 2026)  
Percentage of respondents



**What types of Australian goods and services did you buy in China before your first visit to Australia?**

Source: L.E.K. Survey, questions: Q27, Did you buy Australian-Made (or sourced) goods and services in China prior to your first visit to Australia?; Q30, What types of Australian goods and services did you buy in China before your first visit to Australia?

**Figure 18**  
Reasons for not purchasing (February 2026)  
Percentage of respondents



**What are the main reasons you did not purchase Australian goods and services in China prior to your visit to Australia?**

Source: L.E.K. Survey, questions: Q27, Did you buy Australian-Made (or sourced) goods and services in China prior to your first visit to Australia?; Q28, What are the main reasons you did not purchase Australian goods and services in China prior to your first visit to Australia?

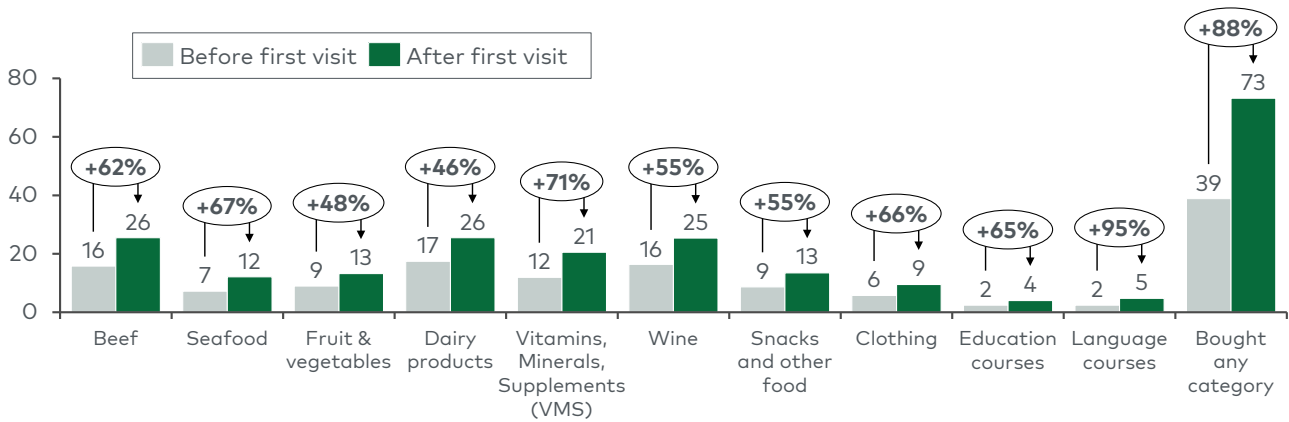
In parallel, the period between 2020 and 2023 saw significant trade restrictions imposed by China on several Australian exports, including significant tariffs on Australian wine and restrictions on beef, lamb and lobster exports (among others). Although many of these restrictions were removed by early 2024, new sector-specific safeguards, including a 55% tariff on Australian beef imports exceeding quota limits introduced in 2026, continue to affect trade flows.<sup>xi</sup>

Despite these dynamics, tourism continues to play an important role in strengthening engagement with Australian goods and services, with a potential incremental direct economic contribution of \$1.5 billion annually. Seventy-five percent of respondents reported purchasing Australian products following their visit, with seafood, vitamins and supplements, and beef the most frequently purchased.

Exposure to Australian products during travel appears to influence both the volume and value of consumption once visitors return home. Average spending across product categories increased by approximately 90% after visitation (Figure 19).<sup>xii</sup>

**Figure 19**

Purchasing behaviour of Australian goods before and after visitation (February 2026)  
Percentage of respondents



**Average spend per respondent (RMB k)**

<b>Before</b>	2.1	0.8	1.0	1.5	1.2	1.6	0.9	0.5	0.3	0.2	10.3
<b>After</b>	3.1	1.7	1.9	2.9	1.9	2.7	1.6	1.1	0.5	0.7	17.9
<b>Δ</b>	+46.9%	+109.1%	+81.9%	+95.2%	+57.7%	+61.9%	+68.9%	+94.8%	+83.7%	+185.2%	+74.5%

**For each of the categories of Australian goods and services you purchased in China before and after your first visit to Australia, how frequently did you purchase them, and what was your average transaction value?**

Source: L.E.K. Survey, questions: Q32, For each of the categories of Australian goods and services that you purchased in China before your first visit to Australia, how frequently did you purchase them, and what was your average transaction value?; Q34, For each of the categories of Australian goods and services that you purchased in China after to your first visit to Australia, how frequently do you purchase them, and what is your average transaction value?

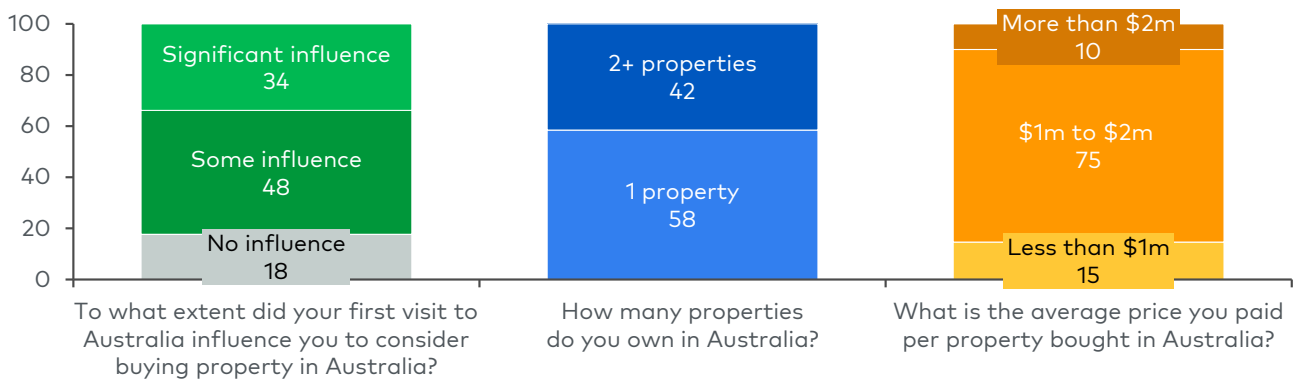
The clear link between visitation and purchasing behaviour underscores the importance of promoting the quality of Australia’s products to Chinese visitors and leveraging Australia’s reputation for quality and safety, and highlights the ‘Made in Australia’ halo in in-China marketing efforts. This will enable tourism to generate sustained demand for Australian goods long after the initial trip.

### Visitation also drives Australian real estate and business investment

Property investment remains one of the most visible channels through which tourism translates into broader economic engagement with Australia. Chinese investors have historically been among the largest sources of foreign property investment in Australia, particularly in major cities such as Sydney and Melbourne. Among surveyed respondents who own property in Australia, around 80% reported that their first visit influenced their decision to purchase, highlighting the role of tourism as an introduction to the Australian market and lifestyle. Owners hold around 1.5 properties on average, with values commonly in the \$1 million to \$2 million range (Figure 20).<sup>xiii</sup> Even among those who do not currently own property, approximately 65% indicated they would consider purchasing, motivated both by perceptions of property as a sound investment and by longer-term ties to Australia, including the need for accommodation while studying, working or supporting children studying in Australia.

**Figure 20**

Visitation influence and property characteristics of house-owning survey respondents (February 2026)  
Percentage of respondents with an Australian property



Source: L.E.K. Survey, questions: Q44, To what extent did your first visit to Australia influence you to consider buying property in Australia?; Q42, How many properties do you own in Australia?; Q43, What is the average price you paid per property bought in Australia?

Visitation can influence business investment decisions. Around 10% of respondents reported having investments in Australian businesses, with approximately 85% of these investors indicating that their first visit to Australia influenced their decision to invest.<sup>xliii</sup> Australia is commonly perceived as an attractive market due to the availability of standalone investment opportunities and the country’s reputation for stability and security (Figure 21).<sup>xliiv</sup> However, business investment remains less widespread than property investment. Among the 90% of respondents without Australian business investments, the most frequently cited barriers were Chinese regulations governing overseas investment and limited familiarity with the Australian business environment (Figure 22).<sup>xliv</sup>

**Figure 21**

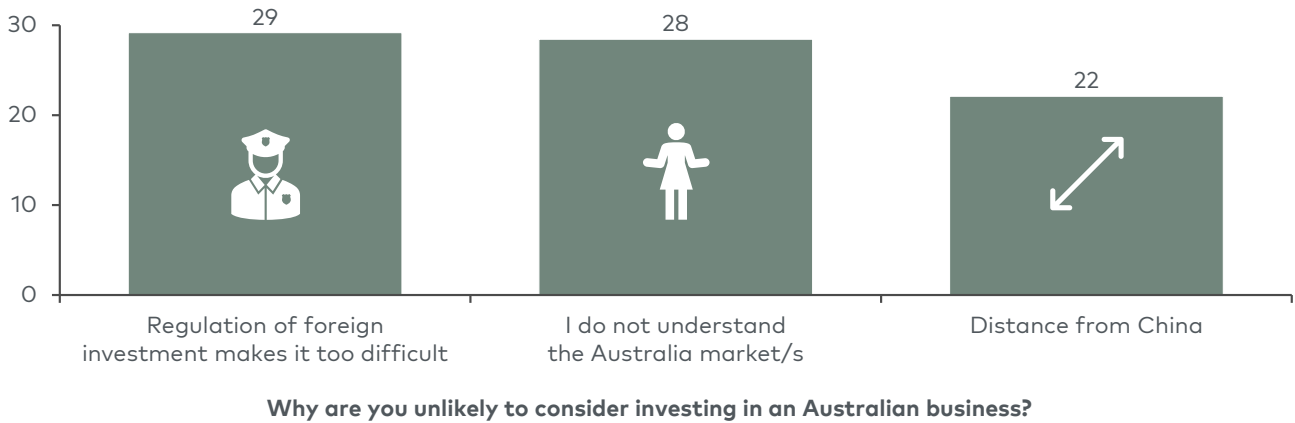
Investment appeal (top three reasons) (February 2026)  
Percentage of respondents with an Australian



**What are the key factors that make an investment in a business in Australia attractive?**

Source: L.E.K. Survey, questions: Q47, Do you currently have an investment in an Australian business or joint venture?; Q52, What are the key factors that make an investment in a business in Australia attractive?

**Figure 22**  
Investment drawbacks (top three reasons) (February 2026)

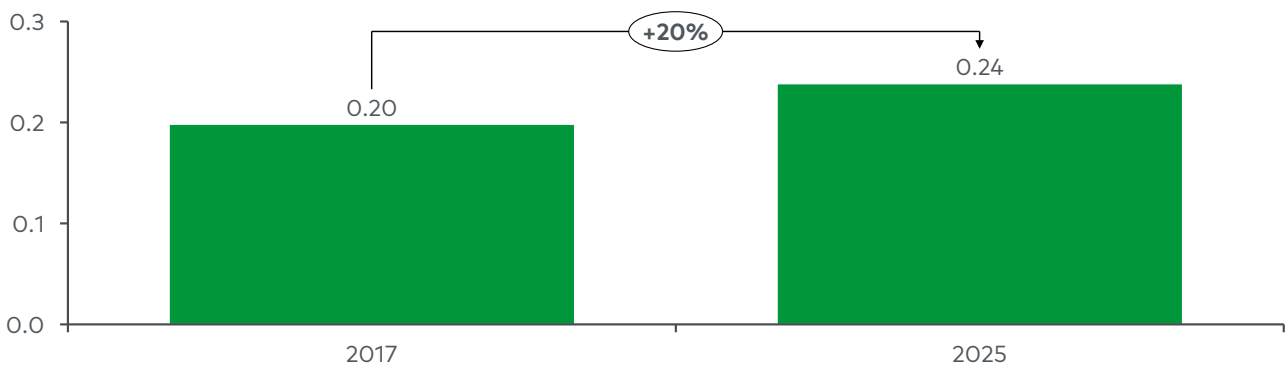


Source: L.E.K. Survey, questions: Q53, Why are you unlikely to consider investing in an Australian business?

### Tourism has a clear connection to international education choices

International education is one of Australia’s largest export industries, valued at over \$53 billion in FY25 and closely linked to the visitor economy.<sup>xlvi</sup> Prior to the COVID-19 pandemic, China was the largest source of international students in Australia, accounting for around one-third of total enrolments. Although student numbers declined during the COVID period due to border closures, enrolments from China have since rebounded to 75% of pre-COVID levels (Figure 23).<sup>xlvii</sup> Chinese students remain an important cohort for Australia’s international education sector, comprising 31% of international higher education enrolments in 2025.<sup>xlviii</sup> Leisure tourism and education are closely intertwined, with visits to Australia often serving as an introduction to longer-term study, living and work in the country, and with education driving significant VFR volumes.

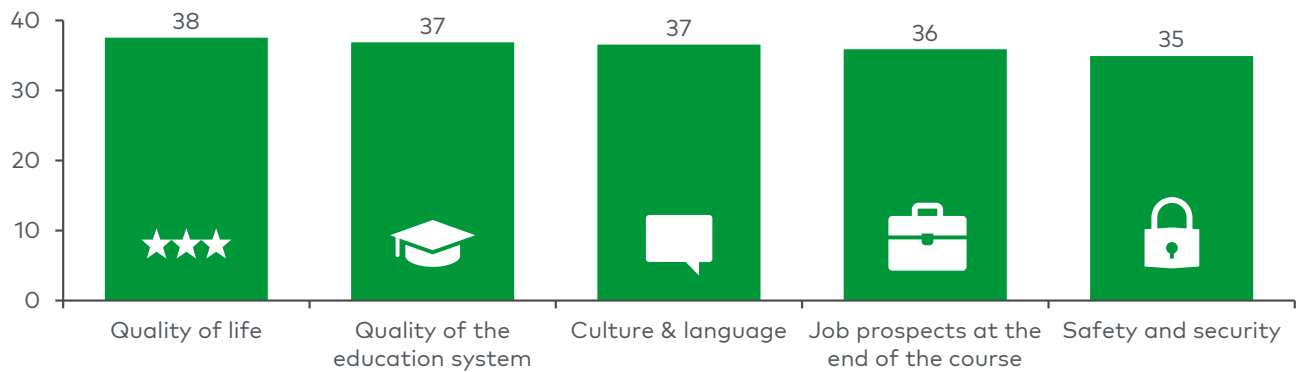
**Figure 23**  
Chinese international student volumes in Australia (CY17, CY25)  
Thousands of students



Source: International Education Data and Research, Department of Education

Survey responses reinforce this connection. Approximately 75% of respondents indicated that their visit influenced decisions to pursue tertiary education in Australia, either for themselves or for family members.<sup>xlix</sup> Around 20% reported that they or their children had already enrolled in an Australian tertiary institution, with the most frequently cited drivers including Australia's quality of life, its strong education system, the cultural and language environment, employment prospects, and perceptions of safety.<sup>l</sup> Among the 80% who had not enrolled, most indicated they would consider doing so in the future. However, among the smaller group unwilling to consider Australian education, high living costs (28%), tuition fees (22%) and limited post-study visa pathways (26%) were identified as the primary barriers (Figures 24-25).<sup>li</sup>

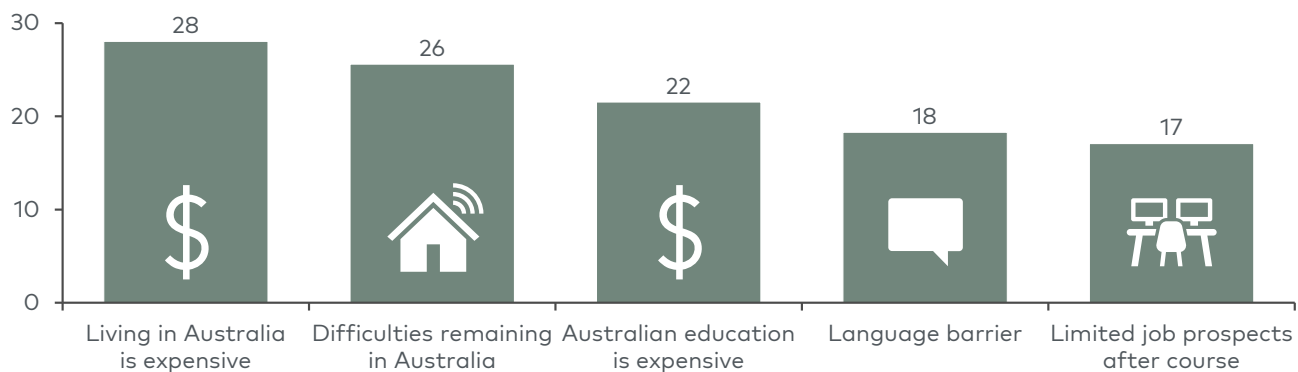
**Figure 24**  
Key factors influencing enrolment (February 2026)  
Percentage of respondents



**What are/would be the key factors attracting you to tertiary education in Australia?**

Source: L.E.K. Survey, questions: Q38, What are / would be the key factors attracting you to tertiary education in Australia?

**Figure 25**  
Key reasons for not enrolling (February 2026)  
Percentage of respondents not enrolled in Australian tertiary education



**Why are you unlikely to consider enrolling yourself or your children in tertiary education in Australia?**

Source: L.E.K. Survey, questions: Q39, Why are you unlikely to consider enrolling yourself or your children in tertiary education in Australia?

# Conclusion

Chinese visitation to Australia has entered a new phase. Australia remains a highly attractive destination, supported by its natural assets, lifestyle, safety, education quality and political stability. Total visitation has not yet returned to historical peaks, as fewer Chinese travellers are travelling internationally and those who do are increasingly favouring short-haul leisure destinations.

At the same time, the profile, behaviours and expectations of Chinese travellers have changed materially. Travellers are younger, more digitally influenced, and increasingly independent and selective in how they plan to allocate their travel spend. This means Australia's future growth will depend on the strength of its destination appeal and how effectively it reaches, engages and serves this evolving traveller base.

The opportunity for Australia extends beyond direct visitor expenditure. Travel continues to play a key role in shaping Chinese consumers' perceptions of Australian goods and services, education, and property and investment opportunities. As fewer travellers arrive already familiar with Australian products, the visit itself has become a more important moment for experiencing Australia's quality and safety, and for strengthening awareness of products made in Australia. Positive visitor experiences can therefore generate sustained economic value after travellers return to China, increasing demand for Australian products, encouraging education choices, and deepening longer-term commercial and personal connections with Australia.

Unlocking this opportunity will require a more deliberate and China-ready approach. Australia's core tourism proposition remains strong, and destination marketing, distribution and the visitor experience must continue to reflect how Chinese travellers make decisions. This means maintaining visibility on the digital and social platforms that shape travel inspiration, supporting independent and flexible itineraries, improving Mandarin-language information and wayfinding, and reducing possible frictions across the visitor journey. By doing so, Australia can convert strong destination appeal into higher visitation, stronger repeat intent, and broader economic engagement across trade, education and investment.

A positive visitor experience can strengthen purchasing of Australian goods and services, influence education choices, and support real estate and business investment decisions. Tourism should therefore be understood not only as a source of direct visitor expenditure, but as a key channel through which Australia is building longer-term economic participation and engagement with China.

## Endnotes

- <sup>i</sup> Tourism Research Australia, International Visitors Survey, YE December 2025
- <sup>ii</sup> Tourism Australia, Australia's top 30 markets deep dives, Tourism Australia Corporate Website, Accessed May 2026
- <sup>iii</sup> L.E.K. Chinese resident survey, February 2026
- <sup>iv</sup> Ibid.
- <sup>v</sup> Ibid.
- <sup>vi</sup> Tourism Research Australia, Visitor Economy Profile 2025 Market: China
- <sup>vii</sup> Tourism Research Australia, Visitor Economy Profile 2025 Market: China
- <sup>viii</sup> Tourism Research Australia, International Visitors Survey, YE December 2025
- <sup>ix</sup> International Airlines Operated Flights and Seats statistics, released by the Bureau of Infrastructure and Transport Research Economics (BITRE) on 16 March 2026
- <sup>x</sup> Tourism Australia, Australia's top 30 markets deep dives, Tourism Australia Corporate Website, Accessed May 2026
- <sup>xi</sup> Press release, 7 March 2026, State Council of the People's Republic of China
- <sup>xii</sup> China Tourism Academy, China's Outbound Tourism Development Annual Report 2024, <https://www.ctaweb.org.cn/en/xsjl/10128.html>, accessed May 2026
- <sup>xiii</sup> China: Consumer Confidence Index (CCI), updated 5 March 2025, National Bureau of Statistics of China
- <sup>xiv</sup> Tourism Research Australia, International Visitors Survey, YE December 2025
- <sup>xv</sup> Ibid.
- <sup>xvi</sup> L.E.K. Chinese resident survey, February 2026. Net promoter score is calculated on the basis of the question "How likely are you to recommend Australia to another person", with responses on a scale of 1 extremely likely and 1 is extremely unlikely. Those who score 9-10 are considered promoters and those who score 6 or less are considered detractors. NPS is calculated as the percentage of promoters (those who score 9-10) less the percentage of detractors (those who score 6 or less)
- <sup>xvii</sup> CDP Tourism Australia, Consumer Demand Project, data for YE December 2025, accessed 16 March 2026, <https://www.tourism.australia.com/en/insights.html#consumer>
- <sup>xviii</sup> L.E.K. Chinese resident survey, February 2026
- <sup>xix</sup> Ibid
- <sup>xx</sup> Ibid
- <sup>xxi</sup> "Come and Say G'Day" campaign, Tourism Australia, accessed 16 March 2026, <https://www.tourism.australia.com/en/resources/campaign-resources/come-and-say-gday.html>
- <sup>xxii</sup> L.E.K. Chinese resident survey, February 2026
- <sup>xxiii</sup> Ibid.
- <sup>xxiv</sup> Ibid.
- <sup>xxv</sup> Ibid.
- <sup>xxvi</sup> Ibid.
- <sup>xxvii</sup> Landmark Tourism Boost To The Iconic Lake Tyrell, Premier of Victoria, accessed 19 May 2026, <https://www.premier.vic.gov.au/landmark-tourism-boost-iconic-lake-tyrell>, Copyright State Government of Victoria
- <sup>xxviii</sup> Tourism Research Australia, International Visitors Survey, YE December 2025
- <sup>xxix</sup> Ibid.
- <sup>xxx</sup> L.E.K. Chinese resident survey, February 2026
- <sup>xxxi</sup> Tourism Research Australia, International Visitors Survey, YE December 2025
- <sup>xxxii</sup> Ibid.
- <sup>xxxiii</sup> L.E.K. Chinese resident survey, February 2026

<sup>xxxiv</sup> CommBank media release, 'CBA leads major banks with launch of Alipay', 20 December 2018, <https://www.commbank.com.au/guidance/newsroom/cba-leads-major-banks-with-launch-of-alipay-201812.html>, accessed May 2026

<sup>xxxv</sup> L.E.K. Chinese resident survey, February 2026

<sup>xxxvi</sup> Ibid.

<sup>xxxvii</sup> "Enter the Dragon: How the China tourism boom is transforming Australia", 2016, L.E.K. Consulting and the Australia Chinese Business Council

<sup>xxxviii</sup> L.E.K. Chinese resident survey, February 2026

<sup>xxxix</sup> Bang Xiao, "Chinese personal shoppers and Australian brands devastated by the impact of coronavirus", ABC News, 17 October 2020, <https://www.abc.net.au/news/2020-10-17/has-daigou-disappeared-in-australia-during-coronavirus-pandemic/12761376>

<sup>xl</sup> Wing Kuang, "Why has China introduced new tariffs on Australian beef?", SBS News, 5 January 2026, <https://www.sbs.com.au/news/article/china-beef-tariffs-australia-explained/l9c5gqz37>

<sup>xli</sup> L.E.K. Chinese resident survey, February 2026

<sup>xlii</sup> Ibid.

<sup>xliiii</sup> Ibid.

<sup>xliiv</sup> Ibid.

<sup>xli</sup> Ibid.

<sup>xli</sup> Recording of international students in the balance of payments statistics, released by the Australian Bureau of Statistics on 2 December 2025

<sup>xli</sup> Tourism Research Australia, International Visitors Survey, YE December 2025

<sup>xli</sup> International Education Data and Research, Department of Education, <https://www.education.gov.au/international-education-data-and-research>

<sup>xli</sup> L.E.K. Chinese resident survey, February 2026

<sup>i</sup> Ibid.

<sup>ii</sup> Ibid.

## About the Authors



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