

MAXIMISING THE VISITOR EXPERIENCE VALUE PROPOSITION.

ADELE LABINE-ROMAIN
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**WHAT DOES THE
ASIAN TOURISM
OPPORTUNITY MEAN
FOR QUEENSLAND?**

**WHAT DO ASIAN
VISITORS WANT?**

**IS YOUR EXPERIENCE
READY? WHAT CAN
YOU DO?**

GROWTH IN TOURISM FROM ASIA IS IMPRESSIVE.

NOW

38 million
trips beyond Asia

1 million
visitors to
Queensland



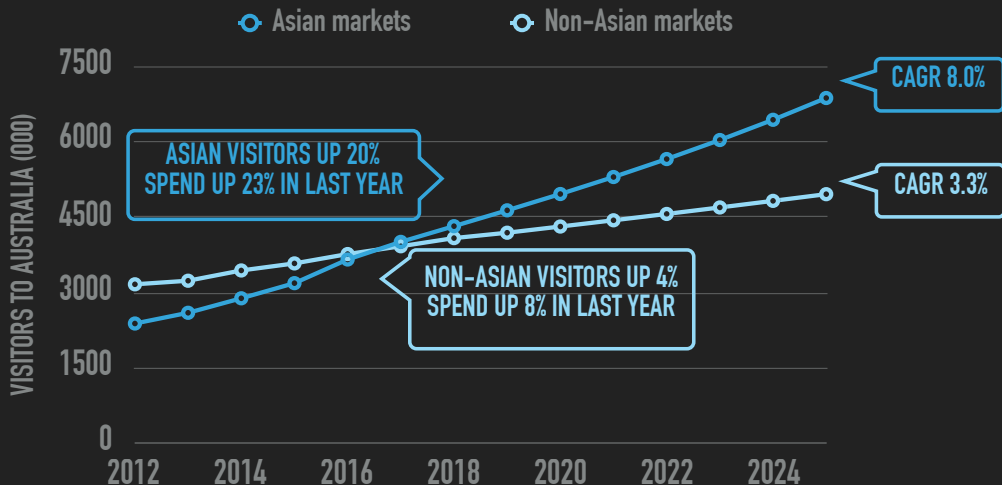
2025

62 million
trips beyond Asia

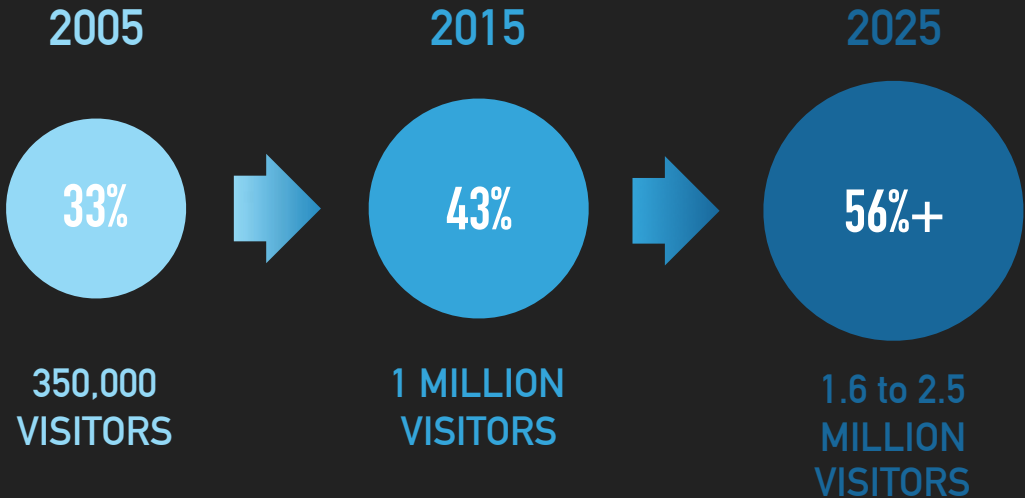
1.6 to 2.5
million
visitors to
Queensland



TRAVEL FROM ASIA IN AUSTRALIA IS GROWING TWO TO THREE TIMES AS FAST AS OTHER MARKETS.

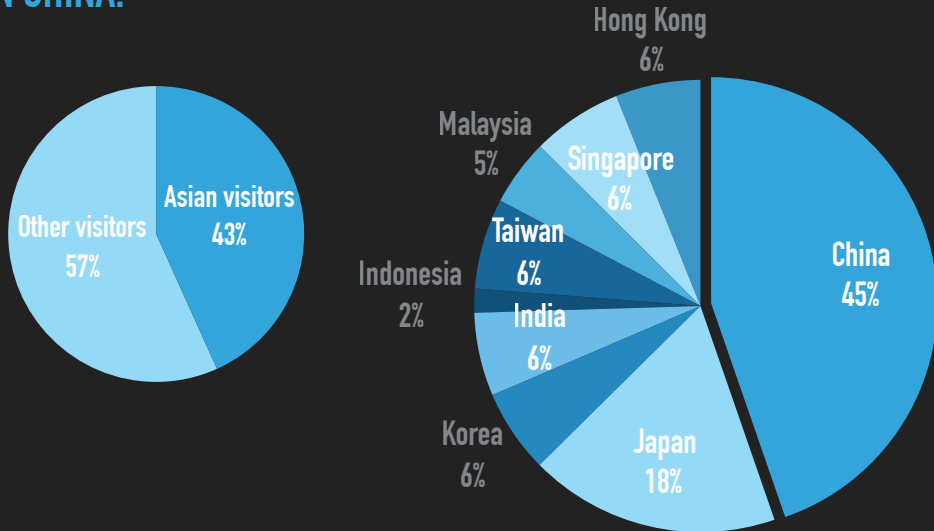


IMPORTANCE OF VISITORS FROM ASIA TO QUEENSLAND HAS INCREASED AND WILL CONTINUE TO GROW.



CONNECTING TO ASIA FORUM

MORE THAN CHINA.



WHAT DO CHINESE VISITORS WANT?

443,000 VISITORS | UP 29%

\$1.029 B SPEND | UP 34%

- ▶ natural beauty and aquatic assets are key drivers
- ▶ preference for developed coastal experiences, nature in remote areas more niche product
- ▶ like the idea of self-drive holidays

CHINA

Aspirations



Beauty and natural environments



Local cuisine and product



Interesting attractions



Beaches and marine life

Travel essentials



Safety and security

Greatest appeal

1. Coastline
2. Great Barrier Reef
3. Wildlife
4. Food & wine

What are their current top markets to travel to?



USA
17.6%



France
11.6%



Italy
10.2%



Germany
8.1%



Australia
6.7%

WHAT DO JAPANESE VISITORS WANT?

177,000 VISITORS | UP 15%

\$335 M SPEND | UP 9%

- ▶ one week visits, one or two stops
- ▶ food is very important
- ▶ willing to venture further for nature experiences
- ▶ more traditional information and planning sources, many still book in person
- ▶ local language services will improve experience awareness

JAPAN

Aspirations



Local cuisine and product



Interesting attractions



Rich history and heritage



Beauty and natural environments

Travel essentials



Safety and security

Greatest appeal

1. Great Barrier Reef
2. Wildlife
3. Beaches
4. Food & wine
5. Natural beauty

What are their current top markets to travel to?



USA
42%



France
9%



Italy
7.5%



Germany
5.8%



Spain
5.3%

WHAT DO KOREAN VISITORS WANT?

59,000 VISITORS | UP 17%

\$200 M SPEND | UP 39%

- ▶ one week visits, one or two stops
- ▶ natural beauty key driver for destination choice, scenery, also willing to venture further
- ▶ need to know more about holiday experiences available
- ▶ local language services will improve experience awareness

SOUTH KOREA

Aspirations



Beauty and natural environments



Interesting attractions



Local cuisine and product

Travel essentials



Safety and security



Value for money

Greatest appeal

1. Natural beauty
2. Wildlife
3. Food & wine
4. Unspoilt wilderness
5. Beaches

What are their current top markets to travel to?



USA
26.7%



Spain
8%



Turkey
6.6%



Italy
5.5%



Croatia
4.8%

WHAT DO INDIAN VISITORS WANT?

59,000 VISITORS | UP 19%

\$112 M SPEND | DOWN 9%

- ▶ natural beauty and aquatic assets are key drivers
- ▶ experiences that appeal across a family group
- ▶ experiences must evoke sense of romance or adventure

INDIA

Aspirations



Beauty and natural environments



Interesting attractions



Family friendly



Beaches and marine life

Travel essentials



Safety and security

Greatest appeal

1. Coastline
2. Wildlife
3. Great Barrier Reef
4. Island experiences

What are their current top markets to travel to?



USA
28.2%



UK
11.4%



Italy
7%



Switzerland
6.4%



Australia
5.8%

WHAT DO MALAYSIAN VISITORS WANT?

47,000 VISITORS | UP 1%
\$95,000 M SPEND | UP 19%

- ▶ safety critical to this group, and value for \$
- ▶ aquatic assets and natural beauty are key drivers – tropical islands / beaches
- ▶ looking for urban experiences and things to do beyond 5PM
- ▶ want fun, breathtaking and unique destinations

MALAYSIA

Aspirations



Interesting attractions



Family friendly



Beauty and natural environments

Travel essentials



Safety and security



Value for money

Greatest appeal

1. Beaches
2. Wildlife
3. Island experiences
4. Visiting different destinations

What are their current top markets to travel to?



Australia
39.3%



UK
19.1%



USA
9.9%



Turkey
8.2%



Switzerland
4.8%

WHAT DO SINGAPOREAN VISITORS WANT?

64,000 VISITORS | UP 11%

\$140 M SPEND | DOWN 13%

- ▶ need new product and experiences
- ▶ food-focused experiences are key drivers
- ▶ looking for urban experiences and things to do beyond 5PM
- ▶ value for money critical to this market

SINGAPORE

Aspirations



Local cuisine
and product



Interesting
attractions

Travel essentials



Safety and security



Value for money



Friendliness and openness

Greatest appeal

1. Great Barrier Reef
2. Food & wine
3. Natural wilderness
4. Wildlife

What are their current top markets
to travel to?



Australia
37.8%



UK
18.3%



USA
15.4%



Switzerland
8%



New Zealand
4.8%

WHAT DO INDONESIAN VISITORS WANT?

17,000 VISITORS | DOWN 1%
\$35 M SPEND | UP 64%

- ▶ safety critical to this group, and value for money – looking for friendly and open citizens
- ▶ natural beauty key driver for destination choice, scenery, and willing to venture further

INDONESIA

Aspirations



Beauty and natural environments

Travel essentials



Safety and security



Value for money



Friendliness and openness

Greatest appeal

1. Beaches
2. Visiting different destinations
3. Wildlife
4. Cities
5. Island experiences
6. Great Barrier Reef

What are their current top markets to travel to?



Australia
27.2%



USA
17.4%



Turkey
9.5%



Netherland
7.4%



Switzerland
6.9%

KEY TRENDS ABOUT EXPERIENCES: WHAT DO ASIAN VISITORS WANT?

- ▶ natural beauty and coastal environments a key driver for many markets – China, Korea, India and Indonesia
- ▶ food-focused experiences a real focus for the Japanese, Hong Kong, Singapore markets
- ▶ need to combine natural beauty with urban experiences
- ▶ focus on safety and security is heightened for visitors from Indonesia and Malaysia
- ▶ key to engage with each market – can be significant differences within an individual market (China) or segments (Millennials vs. 35–49 or retirees)

THANK YOU.

Contact Me



ADELE LABINE-ROMAIN | adele.labineromain@gmail.com