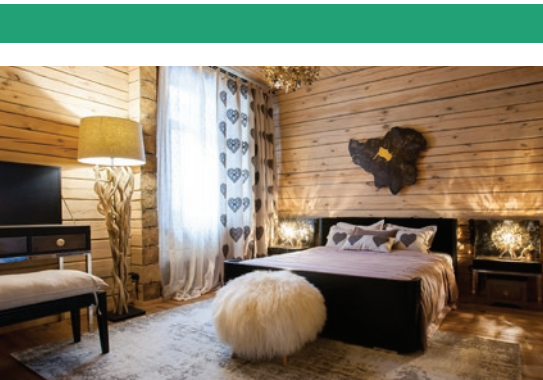




Curtin University



SOUTH WEST DEVELOPMENT COMMISSION (SWDC)  
BANKWEST CURTIN ECONOMICS CENTRE (BCEC)

# SOUTH WEST FOR ASIA:

Promoting tourism product development in Australia's  
South West tourism region for Asian markets

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Supported by: 

## About BCEC

The Bankwest Curtin Economics Centre is an independent economic and social research organisation located within the Curtin Business School at Curtin University. The Centre was established in 2012 through the generous support of Bankwest, a division of the Commonwealth Bank of Australia. The Centre's core mission is to deliver high quality, accessible research that enhances our understanding of key economic and social issues that contribute to the wellbeing of West Australian families, businesses and communities.

The Bankwest Curtin Economics Centre is the first research organisation of its kind in Western Australia, and draws great strength and credibility from its partnership with Bankwest, Curtin University and the Western Australian government.

The centre brings a unique philosophy to research on the major economic issues facing the state. By bringing together experts from the research, policy and business communities at all stages of the process – from framing and conceptualising research questions, through the conduct of research, to the communication and implementation of research findings – we ensure that our research is relevant, fit for purpose, and makes a genuine difference to the lives of Australians, both in WA and nationally.

The centre is able to capitalise on Curtin University's reputation for excellence in economic modelling, forecasting, public policy research, trade and industrial economics and spatial sciences. Centre researchers have specific expertise in economic forecasting, quantitative modelling, micro-data analysis and economic and social policy evaluation. The centre also derives great value from its close association with experts from the corporate, business, public and not-for-profit sectors.

## About SWDC

The South West Development Commission is part of the Western Australian Government. Our aim is to make the South West region an even better place to live, work and invest. We do so by partnering with communities, government, business and industry to identify and support projects that benefit the region.

This project complements our strategic objectives including international competitiveness and developing regional initiatives. Our key focus areas in relation to tourism will include: Trade and Investment Facilitation, Market and Consumer Insights, and Regional Growth Opportunities.

## About ASW

Australia's South West Inc. (ASW) is the peak tourism body for the South West region of Western Australia, including the regions of Bunbury Geopraphe, Margaret River, Blackwood River Valley and Southern Forests, and the Great Southern.

Our primary role is to stimulate visitation to the South West region. To do so, we manage a comprehensive schedule of marketing activities to promote the region as a desirable tourism destination both domestically and internationally. We aim to provide the consumer with information on how to spend more and stay longer while in the region – to ultimately deliver increased visitor numbers and expenditure for our members, the regional tourism businesses.

We facilitate relations between the tourism industry and the operators in the South West and draw upon the wealth of experience from our members and Board.

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## Foreword



The South West is the most visited region in Western Australia outside of Perth, and receives more visitors from Asia than any other state.

It's little wonder why. The South West of Western Australia offers a kaleidoscope of high quality experiences that appeal to people from throughout the world.

As a destination like no other, a diverse range of experiences can be enjoyed in a single day – or stay longer and explore breathtaking wilderness areas, discovering iconic natural cave systems, and visiting historic landmarks such as the Busselton Jetty and the inland rivers and valleys, to sampling locally-produced food and wine of exceptional high quality.

And the region will become an even more appealing place to visit in the future. For example, the State Government is investing in the redevelopment of Bunbury's Dolphin Discovery Centre. When the greatly enhanced tourist attraction reopens in December 2018, it will offer an exciting mix of modern exhibits and opportunities to encounter wild dolphins in their natural habitat.

With such a terrific product to work with, there is room to grow the tourism industry in the South West with the view to increasing investment in the region to boost local businesses and create jobs.

The South West Development Commission has been pleased to partner with Curtin University and Australia's South West to identify opportunities for delivering new experiences into the Asian marketplace.

We will be working further with Australia's South West and the local tourism industry to capitalise on the opportunities that have been highlighted in this report, complementing the efforts of the wider State Government to target the high growth Asian markets.

By teaming up to offer more tailored products and services that appeal to visitors from different cultural backgrounds, not only will the South West benefit, but visitors will also enjoy a more fulfilling experience.

**Rebecca Ball**

Acting Chief Executive Officer  
South West Development Commission



## Executive summary

As a critical growth market for the tourism industry in Australia's South West (ASW), a stronger focus on emerging Asian markets has become a strategic priority for the region. The project "South West for Asia" is aligned with these broader strategic directions and initiatives of the Australia's South West tourism region and aimed to address the existing knowledge gap on the tourism behaviour of Asian visitors in ASW and deriving implications for future development in terms of the region's Asia readiness and attractiveness.

Extensive qualitative interviews with Asia-experienced tourism providers (including tour operators, visitor centres, attraction points, wineries, restaurants etc.) and with Asian visitors provided a strong evidence base. It was further enriched by a social media analysis, an online survey administered to tourism providers in ASW and an analysis of good practices. Based on this comprehensive data collection, the study produced a number of recommendations on how to further improve the attractiveness of ASW for Asian visitors.

Interviewed Asian-experienced tourism providers argued that Asian visitors come to ASW for a mix of key attraction points and to experience the natural scenery, local food and wine production. They also hold that in order to become more Asia friendly ASW should, amongst others, engage in new product development and improve the digital experience, providing multi-language information. The latter can ensure greater visibility if new iconic attraction points are added; new product development can also make sure the quantity and quality of experiences in areas such as food, coastal/marine, winter and accommodation are further expanded.

Interviewed Asian visitors to ASW held views relatively congruent to the interviewed providers and experts. They confirmed that their primary motivation to visit ASW was linked to the clean and unpolluted environment, the blue skies and blue water, beaches and scenery as these elements often differ to the reality in places where Asian visitors come from. By referring to places such as the Leeuwin Lighthouse and the Busselton Jetty, Asian visitors confirm the importance of *having* and *developing* iconic attractions. Visitors' suggestions for improvement include increasing the number of activities in general and providing further integrated experiences in ASW around food, wine and its coast. They also suggest to more profoundly consider their interest in buying typical products, taking photos and posting these photos immediately online.

Analysed social media contributions about ASW posted by Asian users on Twitter support that nature-based experiences and culinary experiences are two major hooks to generate attention towards ASW. Many of the social media users here-included are self-entitled 'foodies', being strongly motivated to visit new places based on food and wine offers. Next to the scenery and beautiful landscape, activity-oriented offers ranging from hiking to surfing generate interest for ASW on Twitter.

Surveyed tourism providers in ASW underscore the importance of Asian markets for their business and exhibit moderate optimism in terms of growing them even further. They also see the unique nature and clean environment as being the key proposition to attract Asian visitors to ASW, but ask for more bespoke experiences and additional major attraction points to incorporate and deliver this regional competence. They also highlight weaknesses in terms of destination awareness, direct flights, digital readiness, opening hours and dining options.

## Executive summary (continued)

A number of existing good practices in dealing with Asian visitors in and beyond WA suggest that attractiveness for Asian visitors can be improved by: providing high quality access to internet (with co-marketing implications); by allowing for market-like shopping opportunities with bargaining elements; and by providing hands-on experiences that allow for interaction and include tactile components. From a destination point of view, good practices indicate that developing major hooks that convey and display a region's core competences can increase the visibility and relevance of a region for Asian visitors.

Key recommendation in terms of product development and adaptation include the identification of a clear unique selling proposition (USP) and its delivery through an increased number of iconic attraction points and activities. There is also room to bundle (sometimes dispersed) existing experiences in modules and itineraries and thus making them more accessible for visitors. Food, activities, winter, accommodation and self-drive have been identified as areas where product development initiatives might fall on 'fertile Asian grounds'. Moreover, Asian needs can be more specifically tackled by including Asian food options in existing restaurants and cafes, by seriously considering the cook-at-home option and by making ASW (more) digitally ready, including offering multi-language information with the help of technology.



# Key findings

## Background & Context

- China, the main driver of increased Asian visitation to Australia, overtook New Zealand in 2017 to become Australia's largest source market, with 1.25 million visitors.
- Generally, when visiting Australia, Chinese tourists tend to be particularly interested in nature and wildlife, and to a lesser extent food and wine experiences.
- In 2017, international visitor numbers accounted for 5% of overall visitation to ASW. Singapore and Malaysia rated second and third strongest source markets, after the UK, displaying strong growth patterns. Despite clearly increasing numbers, at the moment China is only the eighth most important source market.
- Some Asian markets show complimentary patterns in seasonality: For visitors from Singapore, peak travel is around December, June and also September, visitation from Malaysia peaks in May, July and September and also in November, while Chinese visitors prefer to visit around the Chinese New Year (end of January/February) and also in July. Interestingly, the October peak for Chinese Outbound travel, as observed in many other destinations, is not present in WA.
- Significant trends in Asian outbound tourism include growth in free and independent travellers (FITs), though there is a need to consider tourism as a product that is not only consumed for individual hedonistic pleasure but for gaining prestige within peer groups and that travel is, hence, "an investment" as well as "work".
- In this positional 'game', (unique) activities and experiences are used to position oneself, with photos providing evidence and social media channels being used to let others know.

## Expert interviews

- There is undeniable potential to further grow Asian visitation to ASW.
- Despite significant differences between Asian source markets, from a supply and business case perspective, becoming generically Asia friendly appears to be a more realistic goal.
- The main motivation for Asian visitors to come to ASW is to experience the natural scenery, and the local food and wine production.
- Key weaknesses with respect to Asian visitation to ASW include digital experience, the interface between tour operators and service providers, a lack of market consideration in the areas of food and accommodation, and difficulties conveying the (experiential) logics of the region.
- The single biggest barrier to further increase visitation of Asians to ASW seems to be the low destination awareness.
- Interviewees call for defining a clear unique selling proposition (USP) for ASW, and increasing visibility of this proposition by adding strong ("iconic") key attraction point(s) that are rooted in regional core competences while at the same time appealing to Asian markets.
- Intelligent product adaptation is important, but even more important is adding new, additional products and activities – as Asian visitors strive for an efficient tourism experience, loaded with things to do. It would also allow extended stays, thus reducing the relative weight of time investment for the return travel from Perth to ASW.
- New product development should focus on the areas of coastal/marine experiences, food experiences, accommodation experiences, winter experiences and better packaging of the existing variety of experiences into understandable modules.

## Key findings (continued)

- Major areas of product adaptation include showing cultural sensitivity, technology and internet access, multi-language information with the help of technology (QR codes), Asia-friendly food options, helping to identify photo-opportunities and helping people to fully experience the region (itineraries, packaged modules, and information).

### Visitor interviews

- Asian visitors' primary motivation to visit ASW is linked to the clean environment, blue skies, beaches, the scenery and the outdoor experience.
- ASW's clean and un-polluted environment, as well as the low population density, constitutes a real point of difference with respect to (some) everyday experiences of Asian visitors at home.
- Asian visitors to ASW most often visit attraction points and places such as the Leeuwin Lighthouse, the Busselton Jetty as well as wineries, the Margaret River Chocolate Factory and (some) caves, along with Margaret River beaches and the town centre. Asian visitors also repeatedly cite (nature-based) attraction points in the Great Southern, Southern Forests and Valleys areas, including the Tree Top Walk, Greens Pool in Denmark and The Gap in Albany.
- The Leeuwin Lighthouse and Busselton Jetty are attractive to Asian visitors because they convey a story that creates a perception that a visit to them provides good value for time (and money) invested.
- Visitors' suggestions for improvement include increasing the number of activities in general, providing further deepened and integrated experiences in ASW's core competence areas around food, wine and its coast.
- In addition, Asian visitors suggest that their interest in buying typical products, taking nice photos and posting these photos immediately online are taken more strongly into consideration.

### Social media analysis

- On Twitter, Asians comment most often on nature and culinary experiences within ASW.
- Although nature gazing and sight-seeing represent prevalent activities, visitors report on outdoor activities such as fishing, whale-watching, hiking, surfing, with all considered to be important entertainment.
- Many of the Twitter users here-included are self-entitled 'foodies', being strongly motivated to visit new places based on food and wine offers.
- Singaporean tweets about ASW display a particularly strong interest in being able to take wines back home as gifts and souvenirs.
- Chinese tweets about ASW distinguish themselves by an above-average interest in wildlife (whale watching) and seafood.
- Indonesian users seem to be interested in ASW's adventure-based offers.

### Provider survey

- ASW's tourism providers report that Singapore, Malaysia and China are currently their strongest Asian markets, and their confidence in moderate, future growth is also strongest for these markets.
- Overall, ASW's tourism providers exhibit a moderately positively outlook in terms of growth in Asian visitation over the course of the coming 10 years.

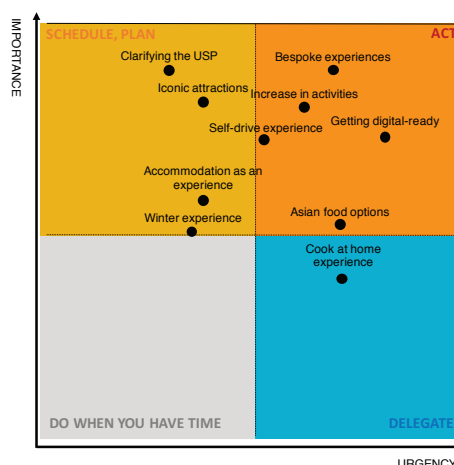
- ASW's tourism providers identify weaknesses in terms of destination awareness, direct flight access, WIFI availability, dining options and opening hours.
- ASW's tourism providers see the clean environment, food and wine, winter experiences, beaches, forests and self-drive as features that make ASW attractive for Asian visitors.
- They suggest more direct flights would further increase the region's attractiveness for Asian visitors, with greater incorporation of the unique natural environment promoted in tourism products and experiences, and the creation of new major attraction points delivering the unique value of ASW's environment.

## Good practices

- A number of good practices in WA and beyond offer valuable lessons on how attractiveness for Asian visitors can be improved via product adaptation and development.
- Learnings include the need to improve free wireless availability and to provide for market-like shopping opportunities.
- Major attraction points, rooted in the regional core competences can improve visibility of a region for Asian visitors. The possibilities of catching/collecting and then eating local food deserves special mentioning.
- Iconic attraction points often emerge at the blurred interface between social media crazes and curation of these initiatives by providing photo opportunities and working with key opinion leaders and influencers.
- Providing multi-language information on menus etc. is an easy way to show cross-cultural awareness, being very much appreciated by visitors. Technology can help to accommodate a number of key languages.
- Successful attraction points are able to respond to an increased willingness to have hands-on experiences that go beyond visual components towards the tactile and interactional.

## Key recommendations

- Defining and communicating a clear USP: The cleanest and most diverse environment a visitor can possibly experience
- Bespoke experiences – Developing a modular system of experience-based itineraries and experience packages
- Iconic attractions – Boosting awareness, visibility and attractiveness by increasing the number of iconic attractions
- Increasing activities – Adding new food and activity based experiences.
- Further improving the self-drive experience
- Getting increasingly digital ready, in order to become more Asia-friendly
- Turning accommodation into an integral component of the experience
- Improving the winter experience
- Including Asian food options to show multi-cultural awareness and respect
- Improving the cook-at-home experience.



# Introduction

As a critical growth market for the tourism industry in Australia's South West (ASW), a stronger focus on emerging Asian markets has become a strategic priority for the region. The objectives are to create new opportunities in international markets, with Asia a key target to increasing visitor numbers, visitor expenditure and length of stay within the region, focussing in particular on strengthening product development, export readiness and capacity building.

The project "South West for Asia" is aligned with these broader strategic directions and initiatives of the Australia's South West tourism region. It aims to address the existing knowledge gap on tourism behaviours of Asian visitors in the ASW tourism region, and to promote the Asia-readiness of supply side actors, as well as do derive implications for future development. It has the following specific aims:

1. ASIA AWARE - Better understanding Asian guests in ASW:
  - To better understand expectations and actual behaviours of (potential) Asian visitors to ASW, with particular regard to different segments and source markets.
  - To investigate realised experiences and encountered experiential barriers in the destination.
2. ASIA READY - Analysing products in ASW for Asian markets:
  - To analyse existing tourism products, offers and service providers in ASW regarding their 'Asia readiness' and contribute to further improvements in that respect.
  - To assess the status quo of Asia readiness and Asia awareness in ASW.
  - To identify good practices.
  - To analyse existing recommendations on promoting Asia readiness.

The research was undertaken in various stages:

1. Long, qualitative in-depth interviews with 15 tourism industry experts on Asian visitation to ASW.
2. Qualitative interviews with 55 Asian visitors at different attraction points in ASW.
3. Analysis of social media posts from Asian countries.
4. Online survey among 38 ASW tourism service providers.
5. Analysis of good practices.

Based on the above research design, the study's findings offer new empirical insights which will be of interest to the entire tourism industry in Australia's South West tourism region. These will also inform government agencies in Western Australia, and will be a valuable source of data to inform (current) debates about tourism product development and product adaptation. In sum, the project has significance for theory development in the fields of tourism and innovation/product development (marketing). It will also provide immediate and direct value for the ASW tourism destination and its tourism providers and will have practical implications for their marketing and management.

In this report, the findings of the study are presented in seven chapters: Section 1 presents background information and positions the study in the current tourism context of Australia's South West. Section 2 illustrates findings from expert and provider interviews about how to improve the attractiveness of ASW for Asian visitors. Section 3 provides an overview of motivations, behavior and suggestions of Asian visitors themselves. Section 4 reports on a social media analysis of postings relating to ASW originating in Asian countries. Section 5 presents findings from an online survey administered to tourism providers in ASW. Section 6 offers a number of good practice analyses to inspire interventions and adjustments in ASW's tourism offers. The final section, 7, concludes with recommendations for product adaptation and development to improve Asia readiness in ASW.



# Background

information and context



## Visitation from Asia

International tourism has grown strongly in Australia over the past two decades. With 8.1 million international visits in 2017, the sector has almost doubled in the last 20 years (Tourism Research Australia, 2018). Over this time, the source markets have also changed. Asia, and especially China and India, have increased in importance in recent years and have become the driving force behind the strong growth in Australia's international tourism. Nonetheless, the traditional markets of Europe and the United States are still relatively important, though they have been steadily losing ground to Asian countries in recent years (Tourism Research Australia, 2018). As of 2017, Australia's top 10 source markets are China, New Zealand, United States, United Kingdom, Japan, Singapore, Malaysia, India, Korea and Hong Kong (China) (Tourism Research Australia, 2018).

In 2017, China overtook New Zealand to become Australia's largest source market with 1.25 million visitors, and it can be anticipated that Chinese visitors will continue to gain importance as a significant future market. It therefore comes as no surprise that future demand from Asia is a strategic priority for the Australian government's China 2020 Strategic Plan, and against the backdrop of an industry increasingly dominated by Asian visitation, a reorientation of Australia's tourism policy can also be noted (Pforr & Reiser, 2017).

However, the increasing Asian orientation in Australia's tourism source markets also poses some challenges for the domestic industry. Amongst others, it has a lasting impact on the distribution of international tourists to various destinations in Australia as visitors from Asian countries, especially from China, India and Singapore, show less of a tendency to visit regional areas, preferring instead Australia's capitals as destinations. In particular Chinese Free Independent Travelers (FITs), who are defined as leisure tourists who are not part of a group tour and don't have any package inclusions, tend to have the lowest dispersal to regional areas. This trend poses a major challenge for many regional areas where there is a strong dependence of the local economy on tourism generated income and employment (Pforr & Reiser, 2017).

## A special focus on Chinese visitors

With more than 135 million international departures and US\$261 billion in tourism expenditure in 2016, China continues to dominate international tourism (World Tourism Organization, 2017). This is remarkable as outbound tourism in China only started in the 1980s, growing rapidly since, particularly over the past two decades. During this period, the China outbound travel market has changed and matured, which is evident in an increasing shift from packaged travel arrangements towards more experienced, independent travellers. Arit (2018) refers to these developments as the first, second and third wave of Chinese travellers. The rapid expansion in China's outbound tourism has been fuelled by the growth of the Chinese economy and the emerging Chinese middle class. Important for the development of the Chinese outbound travel market was also the introduction of the Approved Destination Status (ADS) in the mid-1990s. The ADS is a bilateral arrangement between China and foreign countries that allows Chinese citizens to travel to those 'approved' countries. Australia, along with New Zealand, was amongst one of the first Western countries to be granted the ADS status in 1999. As of 2017, 125 countries have gained an Approved Destination Status (Arit, 2018; Pforr & Phau, 2018).

To date, only about every tenth Chinese citizen participates in international tourism, estimated on the basis of Chinese passport holders, which translates into substantial future growth potential (Arit, 2018). It is therefore no surprise that many destinations around the world try to capitalise on the opportunities created by China's outbound tourism market.

While China has already established itself as Australia's largest and fastest growing source market in international tourism, in the future Australia intends to make even greater use of the opportunities created by China's rapidly growing outbound tourism market. One strategy is to develop new products, services and strategic partnerships. But in order to be successful, a stronger customisation of services and service structures addressing the needs and interests of Chinese visitors is required. Thus, flexible response strategies must be embedded in an effective destination management of change. Furthermore, the importance of fostering cross-cultural understanding through a greater appreciation of cultural differences in beliefs and behaviours is also increasingly acknowledged. This is in line with current research in the area of Chinese outbound tourism, which has shown that it is crucial for destinations to develop a better understanding of the dynamic nature and complexity of the Chinese growth market with all its opportunities and challenges (Pforr & Phau, 2018). Nonetheless, despite the incentive to realise the fast-growing potential of the Chinese market, sustainable growth is generally seen as being of great importance. In particular, the quality of the relationship between guest and host requires special attention, as increased contact can lead to intercultural tensions. The growing significance of the Chinese market therefore requires the fostering of intercultural understanding, based on a greater appreciation of cultural differences.

The most important aspect to remember about Chinese outbound tourism is that Chinese visitors do not engage in tourism only for individual hedonistic reasons but also for signalling social status or constructing an identity, similar to what has been termed "conspicuous consumption" (Volgger & Pechlaner, 2018; Veblen, 1899) or some have even called "irrational consumption" (Dai *et al.*, 2017). A relevant part of the value of outbound tourism consumption is not derived from the value



in immediate use but rather from the reaction of others. In contemporary China, “demonstrative consumption can support the signalling of status and the acquiring of prestige” in the mianzi (face value) and guanxi systems (inter-personal relations) (Volgger & Pechlaner, 2018, p. 221). Outbound tourism experiences, which are still relatively rare in Chinese society and thus provide for ‘positional value’, need to be considered under this aspect and are a mechanism to impress one’s peers (Blok, 2002). In this positional game, participation in (unique) tourism activities is used to position oneself, photos provide evidence, and social media channels are used to let others know. Last, but not least, it is also worth recalling that many of the consumer patterns in today’s Chinese society have been interpreted as mimicking Western patterns (Zhang, 1989; Shu, 1995), thus an overly strong adaptive approach risks misinterpreting the underlying dynamics and can also generate detrimental effects.

During their overseas holidays, visitors from China generally show a strong interest in a mix of experiences that focus on the natural environment, the destination’s culture and history, and typically include activities like eating out and trying different cuisines (Tourism Australia, 2016). Thus, even though shopping and gambling have always been of particular appeal for Chinese tourists, this has gradually changed towards a stronger focus on other product categories, such as nature based tourism, gastronomy and wine, or visiting World Heritage Sites (Pforr & Phau, 2018). Specifically, when visiting Australia, Chinese tourists tend to be particularly interested in nature and wildlife, and, to a lesser extent, food and wine experiences (Tourism Australia, 2016).

Another significant trend in Chinese outbound tourism is the steady growth in FITs (Huang & Gao, 2018), backed by maturing and more experienced market and online booking capabilities, have thus become a condition sine qua non. While FITs have always represented the biggest share of Chinese visitors to Australia, the latest figures from Tourism Research Australia (2018) point to a further drop by almost 6 per cent in Chinese visitors who are on group and package tours.

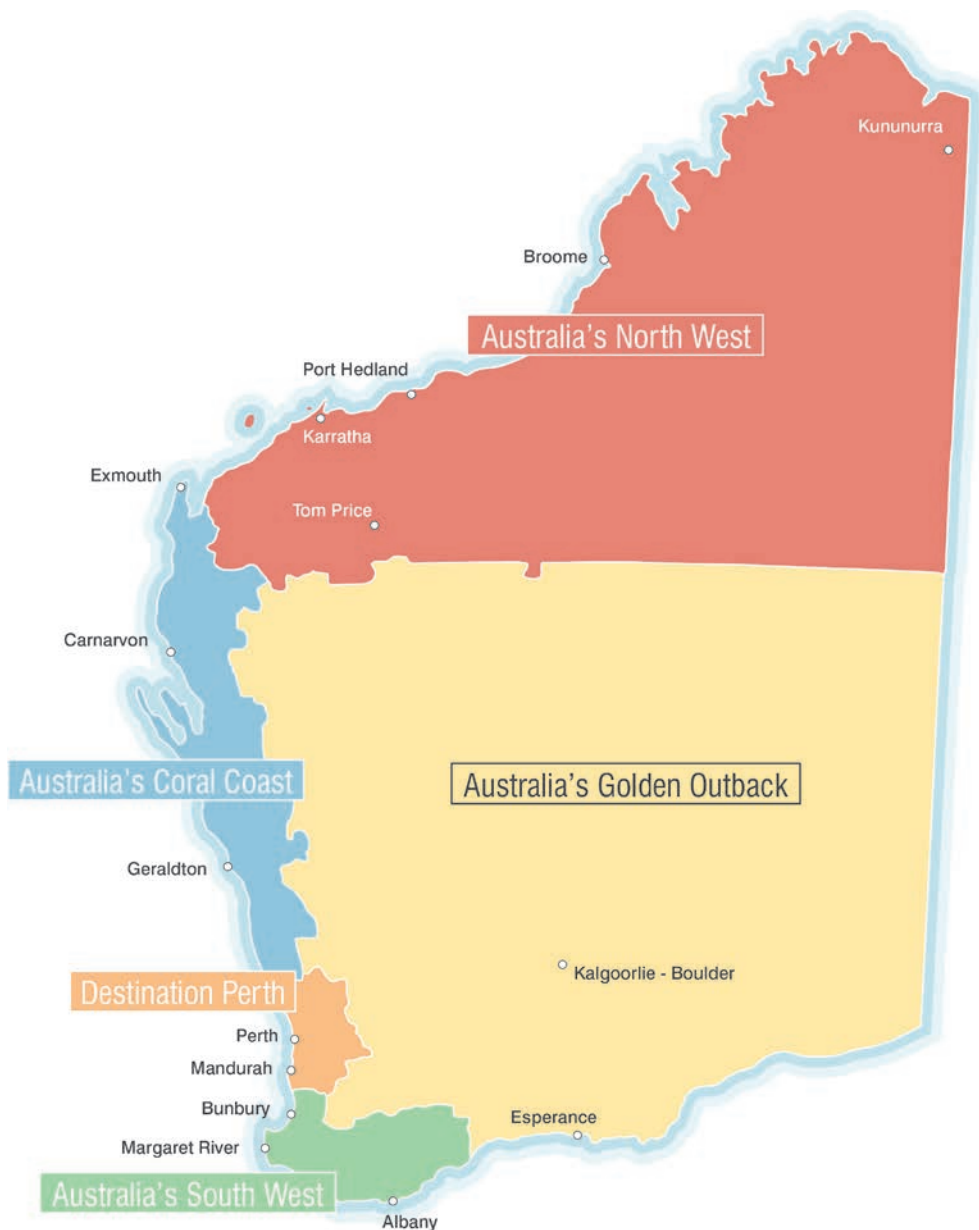
In 2011 Tourism Australia launched its “China 2020 Strategic Plan,” developed in collaboration with a range of industry and government stakeholders and aimed at successfully capturing a share of the growing Chinese outbound market (Tourism Australia, 2011). The strategy mapped out several areas that were considered crucial in maintaining and further strengthening Australia’s competitiveness as a popular destination for Chinese visitors. Specifically, growing aviation links, a better understanding of Chinese tourists’ needs and expectations, and a focus on delivering quality tourism experiences were seen as pillars of future success.

Further, the launch of the “China-Australia Year of Tourism 2017” also highlights the strategic importance of the China outbound market, which is estimated to grow to a value of over \$18 billion by 2020 (Pforr & Phau, 2018).

## Tourism in Western Australia

Western Australia (WA) is divided into five tourism regions (Figure 1). The regions are Destination Perth, Australia's Coral Coast, Australia's Golden Outback, Australia's North West and Australia's South West (ASW).

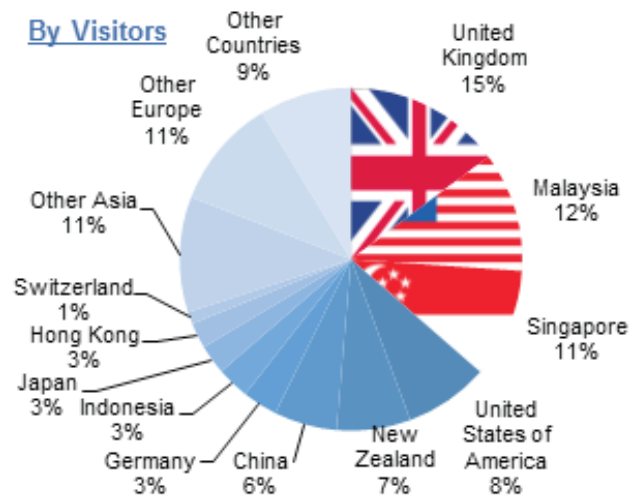
**Figure 1** Western Australia's five tourism regions



Source: Tourism WA, 2018c.

In 2017, 946,000 international tourists were recorded for Western Australia (WA), constituting 11.7 per cent of all international visitors to Australia. They stayed 26.5 million nights and spent \$2.2 billion in WA (Tourism Western Australia, 2018b). The majority spent time in and around Perth (61%) and in the State's South West (21%) (Tourism Western Australia, 2017). Similar to trends seen across Australia, the top six source markets of international visitors to the state were the United Kingdom, Malaysia, Singapore, the United States of America, New Zealand and China (Tourism Western Australia, 2017b) (see Figure 2). However, relatively speaking, Singapore and Malaysia are slightly more important as current source markets, with China relatively less important compared to the rest of Australia.

**Figure 2** Western Australia's tourism source markets



Source: Tourism Western Australia, 2018b.

Thus, in Western Australia, an Asianisation of the source markets can be observed, with Malaysia and Singapore currently constituting important inbound markets. In 2016, with 109,000 visitors, Malaysia was Western Australia's second largest international market by visitor numbers and fourth largest inbound market by visitor spend. Similarly, Singapore (104,000 visitors) was Western Australia's third largest international market by visitor numbers and spend in 2016 (Tourism Western Australia, 2017a; 2017b; 2017c).

Despite the fact that in 2015 Western Australia has become the world's first and the only Australian 'China Ready and Accredited' destination, with it constituting the sixth largest inbound market in 2017, and also despite its geographic proximity and strategic importance (e.g. China 2020 Strategy), developments of the China market for Western Australia lag behind the national trend. In 2016, only 51,000 Chinese visitors travelled to WA, but in 2017 the state started to close the gap compared to developments in the rest of Australia, reporting an increase of 14.2 per cent in visitation over the previous year. Furthermore, with a combined expenditure

of \$291 million in 2017, the 59,000 visitors from China were the top spenders, an increase of 15.5 per cent over the previous year (Tourism Western Australia, 2017a; 2017b; 2017c; 2018). In line with the rest of Australia, Chinese visitors are therefore recognised as an important pillar for WA's push to further increase its share of international tourists.

Visitors from Malaysia, Singapore and China are most likely to visit the state's tourism regions Destination Perth and Australia's South West, with only a small proportion venturing to Australia's Coral Coast, the North West or Australia's Golden Outback. In 2016, only 18 per cent of Chinese, 16 per cent of Malaysian and 34 per cent of Singaporean leisure visitors spent at least one night outside the Destination Perth region. Thus, visitor dispersal from most Asian markets into regional Western Australia is currently relatively low with most visitors remaining in and around the capital city Perth (Tourism Western Australia, 2017a; 2017b; 2017c).

For visitors from Singapore, peak travel is around December, June and also in September, visitation from Malaysia peaks in May, July and September and also in November, and Chinese visitors prefer to visit Western Australia around Chinese New Year (end of January/February) and also in July. Interestingly, the typical October peak for Chinese Outbound travel is not present in WA. More than 40 per cent of visitors from China travel for holiday purpose, 30 per cent are linked to the VFR market (with a similar VFR market share compared to visitors from Singapore and Malaysia) and almost two thirds of Chinese leisure visitors have visited Australia before. In comparison to the rest of Australia, Chinese leisure visitors to WA tend to be younger and free independent travellers, enjoying WA's coast and its beaches. They like to interact with wildlife and appreciate good food and wine. Tourists from Singapore and Malaysia find similar experiences most appealing while visiting WA. About two thirds of both markets travel to WA for holidays, while repeat visitation from Singaporeans tends to be particularly high, with more than 80 per cent of leisure visitors having travelled to Australia before. Visitor spend linked to education is also high, with visitors from China (64%) and Malaysia (34%) (Tourism Western Australia, 2017a; 2017b; 2017c).

## Australia's South West

As is seen in Figure 3, Australia's South West region is broken into four sub-regions, namely Bunbury Geographe, Margaret River Region, Southern Forests and Valleys, and the Great Southern region. Australia's South West Inc. is the peak regional tourism organisation for the Australia's South West region. The organisation promotes the region as a desirable tourism destination to domestic and international markets, with the aim of increasing visitor numbers, yield and dispersal. Its activities are undertaken with assistance and financial support from Tourism Western Australia (the State's tourism peak body), various tourism operators, and co-operative buy-in. The South West Development Commission also plays an important role in the funding of tourism development in the region. A number of additional tourism associations operate in the region, including in particular the Margaret River Busselton Tourism Association (MRBTA), which covers the Margaret River Region.

**Figure 3** Subregions of Australia's South West



Source: Australia's South West Inc.

Australia's South West tourism region, which stretches from south of Mandurah to Albany and east to Bremer Bay, is the second most visited tourism region in WA, with 3.13 million visitors in 2017 (Tourism Western Australia, 2018). It is heavily dependent on the intrastate market. For the year 2017, for example, intrastate visitor numbers to the region accumulated to 88 per cent, whereas interstate and international visitor numbers accounted for 6 per cent and 5 per cent of overall visitation respectively (Tourism Western Australia 2018).

The popularity of the ASW tourism region is based on a unique combination of natural attractions, such as a stunning coastline and beautiful beaches, exceptional forests, in particular old-growth forests (e.g. Pemberton) and a diverse marine environment (e.g. whale and dolphin watching), as well as a renowned wine and food industry (e.g. Margaret River). These attractions offer ample opportunities for nature-based and ecotourism experiences, but also great potential for wine and culinary tourism and the meetings, incentives, conventions and exhibitions industry.

As can be seen in Table 1, also in Australia's South West (ASW), the international tourism sector has been transformed by increasing inbound visitors from Asia with Singapore and Malaysia as second and third strongest source markets in 2017 respectively. However, when compared to WA as a whole (and in particular to the Perth area), the ASW tourism region currently underperforms in the Chinese market, which is only the eighth most important source market. Other emerging Asian source markets to the ASW tourism region are Hong Kong (China) (12th), Japan (13th), Taiwan (14th), Indonesia (16th) and Korea (17th) (Tourism Western Australia, 2017a; 2017b; 2017c). Over the past years in particular Singapore, Malaysia and China together with Hong Kong (China) and Indonesia have shown the strongest growth patterns (Table 1).

**Table 1** Top 18 international markets to ASW

Rank	Market	3 year averages			Change	
		2006 - 2008	2009 - 2011	2012 - 2014	2015 - 2017	2015-17 vs 2012-14
1	United Kingdom	36,000	33,200	29,600	32,900	11.1%
2	Singapore	9,500	10,300	12,400	26,500	113.7%
3	Malaysia	3,000	6,500	6,800	14,200	108.8%
4	United States of America	6,900	7,600	8,500	13,300	56.5%
5	New Zealand	9,000	11,900	11,900	11,300	-5.0%
6	Germany	7,900	8,200	7,700	9,200	19.5%
7	France	2,600	5,100	5,000	5,400	8.0%
8	China*	1,100	1,400	2,600	4,800	84.6%
9	Canada	3,700	3,600	3,700	4,000	8.1%
9	Ireland	2,900	3,100	3,800	4,000	5.3%
11	Scandinavia	3,000	2,600	2,800	3,900	39.3%
12	Hong Kong (China)	1,600	1,500	1,600	3,600	125.0%
12	Switzerland	3,700	3,000	3,200	3,600	12.5%
14	South Africa	3,400	4,200	2,000	3,200	60.0%
15	Indonesia	1,200	1,600	1,700	2,900	70.6%
15	Netherlands	3,300	2,900	2,300	2,900	26.1%
17	Taiwan*	1,000	1,200	1,800	2,400	33.3%
18	Japan*	3,300	2,000	1,700	2,200	29.4%
Total of the above countries		113,500	121,200	121,900	167,600	37.5%

Notes: \*Cells in red denote small sample sizes (n<40) and should be used with caution. Markets ranked by average annual visitors in 2015-17.

Source: Tourism Research Australia International Visitor Survey, various years.

As Asia is a critical growth market for Australia's South West tourism industry, the observed trend of limited visitor dispersal from Asian markets into the region has been a major challenge in the region's efforts to increase their share of Asian visitors. A stronger focus on the emerging Asian markets has thus been a strategic priority. The objectives are to create new opportunities in international markets, with Asia as a key target to increase visitor numbers, visitor expenditure and length of stay within the region. In particular, the emphasis is on strengthening product development and export readiness of the developed products ("product adaptation"), with a special focus on capacity building.





# Expert

interviews

## Aim of analysis

Experts and tourism providers with experience in working with the Asian market in ASW were interviewed to capture their thoughts about improving the attractiveness of ASW for Asian visitors. Expert and (experienced) provider interviews are a very efficient way of pooling year-long, on-the-ground expertise and generating insights that integrate knowledge of the demand side with a good understanding of possibilities and contingencies on the supply side. Such supply-side interviews are especially valuable if paired with an analysis of consumer perspectives (see Chapter 3).

## Data basis

Between 2017 and 2018 15 experts from the tourism industry and various government organisations were interviewed to capture their views on Asian visitation and Asia readiness in ASW. Interviewees represented tourism industry peak bodies, state and regional tourism organisations and associations, tour operators, inbound tour operators working with the Asian market specifically, service providers, managers of attraction points, managers of visitor centres and wineries. The criterion for selecting these interviewees was their practical knowledge and experience in working with Asian visitors in ASW. Interviews lasted between approximately 30 minutes and 60 minutes each. Given openness is a key requirement of qualitative interview techniques as it allows interviewees to voice their own problem definitions and suggestions for solutions (Gephart, 2004), interviews were conducted in a semi-structured and generally open questioning style to allow respondents to convey their opinions in an unconstrained manner. Questions revolved around topics such as general considerations about the development of Asian tourism in ASW, motivations to work with Asian tourists in ASW, differentiation between different segments in Asian visitation to ASW, main drivers for Asians to come to ASW, main barriers and obstacles for Asians visiting ASW, good practices, adaption needs for existing products, and developing new products to improve the region's attractiveness for Asian visitors.

The interviews were recorded, transcribed and systematically analysed with the GABEK/WinRelan method (Zelger, 2000). GABEK allows analysis of qualitative, open interviews on a keyword basis, and hence enables identification of statement patterns in an overall set of interviews. In this context, the single interviewee is not the focus (i.e. limited interest in "who" is speaking) with the focus on the comprehensive set of interview statements from all interviewees (i.e. the focus is on the "what" has been said). Based on that principle, the analysis transcends the individual respondents and treats the whole interview set holistically. If anything, statements are grouped on a thematic basis, not on the basis of who spoke (Pechlaner & Volgger 2012).

As output, GABEK produces semantic networks of keywords that graphically display associations of interviewees ("association graphs"). It is important to note that due to complexity issues a GABEK Association Graph does not display all related statements, but the aim is rather to cover some of the central themes that revolve around an issue. This means that the analysis does not claim to be exhaustive, nor is it directly possible to weigh different opinions against each other, or to determine their relative prevalence. Qualitative analyses such as GABEK are designed to identify qualities, themes, and communicative as well as perceptive categories, but they are not suited to quantify. Moreover, it needs to be emphasised that the reported links are based on subjective, although to different degrees, perceptions of the interviewees.

# Results

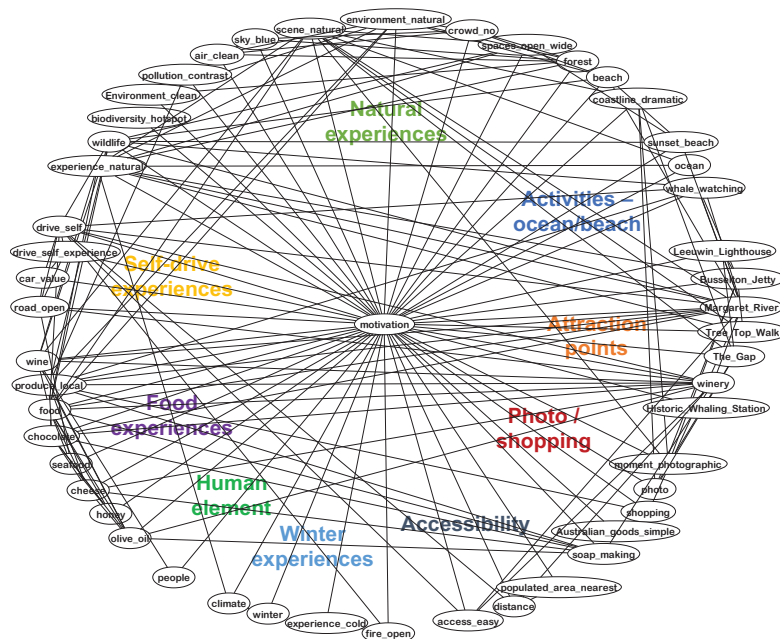
In the following, findings of the expert and provider interview analyses will be presented in a combined format by summarising GABEK association graphs and verbalising summaries enriched with direct quotes from the interviews. The subsections focus on interviewees' opinions about:

- why Asian tourists visit ASW;
- which major segments of Asian tourists visiting ASW can be differentiated;
- barriers for Asian visitation to ASW;
- needs for improvement;
- product adaptation opportunities;
- product development opportunities.

## Why Asian tourists visit ASW

Interviewed experts mentioned a number of motivations for Asian visitors to visit the ASW region (see Figure 4). These can be grouped into nine categories (without implying any ranking): accessibility, natural experiences, ocean and beach-related activities, self-drive experiences, visiting specific attraction points, food experiences, human factor, winter experiences and taking photos or shop. While in the following motivations will be discussed separately, usually individual motivations to visit ASW are a combination of these motivations. The associated motivations do not differentiate between those which determine the visitation decision from those which are only auxiliary in the decision making. In other words: no hierarchy or ranking of motivation is implied.

**Figure 4** Motivations of Asian tourist to visit ASW (provider interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## Accessibility

It is interesting that according to some interviewees a strong selling proposition for ASW for Asian visitors is 'distance', or rather relative closeness to Perth, which compared to other places in WA is relatively contained for ASW. ASW can be conceived as the nearest populated regional area to Perth, which turns it into the first pick for people willing to travel into regional WA.

However, if we consider that there is a major barrier bringing visiting Asians out of Perth, 'distance' can also be regarded as a barrier (see further below).

*"Going to the Southwest and places like that, what attracts them is it's the nearest populated area. You can't really go east, you can't really go north." (Interviewee, N09)*

*"You have got Singapore, which is a more mature market and they are repeat travelers to WA. They look for new things to do and explore, and Margaret River would fall under that category because it is close-by, easy access, good roads." (Interviewee, M10)*

## Natural experiences

According to the interviewed experts, Asian visitors are attracted to ASW by natural experiences, such as the natural scenery, including its cleanliness and colour (air, water), the properties of the natural environment (biodiversity and wide, open spaces), and specifically the scenic coastline, beaches and forests with tall trees and wildlife. This motivation is often justified by referring to the contrast with their often strongly urbanised context in their usual places of residence. Having said that, according to interviewees, what often makes the real difference with natural experiences for Asian visitors is the possibility of telling a story around a specific experience (e.g. see below about "the point where the two oceans meet") or having a fair degree of accessibility.

*"The clear reason why people go down to the South West region is because of the environment, which is so different to what they get in some parts of Asia: the blue skies, the clean air... and the fundamental fresh produce as well." (Interviewee)*

*"[What drives Asian tourists to ASW] I think it is nature-based experiences in terms of how pristine and beautiful the landscape is. I think that is something really different to them when they have a really strong city culture. I think it is then what the environment provides as well: world-class wines and food." (Interviewee)*

*"[People from] places like Singapore .. Kuala Lumpur: If they are coming from their very populated and high-rise living then they come to Australia and in particular rural Australia they are in awe of the wide open spaces and looking at the scenery." (Interviewee)*

## Ocean and beach-related activities

The interviewed experts also mention ocean and beach-related activities as a main motivation for Asian visitors to come to ASW. Two of the mentioned aspects relate to watching sunsets at the beaches as well as whale watching. Visiting specific rock formations (Green's Pool, Canal Rocks etc.) are another motivation in this regard.

## Self-drive-experience

According to interviewed providers, part of the motivation of Asian visitors to visit ASW is to be found in the self-driving experience. This is on the one hand linked to the region's wide open roads, which are very different from what many of ASW's Asian visitors experience back home; on the other hand, it is also linked to the fact that renting vehicles is cheaper in Australia than in many Asian countries. Hence, Asian visitors might turn the need to rent a vehicle into an opportunity to drive a different, newer, more luxurious car than during their everyday life.

*"[A main motivation] is the open space, the beautiful roads that are easy drive and all the cars; you can get a nice car for a reasonable price compared to places in Southeast Asia. In Singapore, Malaysia and Indonesia cars are a lot more expensive than here. So, visitors can afford to rent a ... nice car ... and enjoy the pleasure of driving on an open road. This is basically the main thing." (Interviewee)*

*"Definitely they want something that is different. A lot of them will want to drive because you just get on the road and keep going, whereas in Southeast Asia you might have to start-stop and even on highways you can't get the driving that you get here." (Interviewee)*

## Visiting specific attraction points

According to the interviewed experts some specific attraction points have a crucial role in the motivational structure of ASW's visitors. These include the Leeuwin Lighthouse, the Busselton Jetty, Margaret River, the Tree Top Walk, The Gap, and the Historic Whaling Station, as well as wineries and caves in general. In particular, the Leeuwin Lighthouse and Cape Leeuwin appear very attractive to Asian markets because of the story around "the two oceans meeting", "being the tallest lighthouse on mainland Australia" and "being the most south-westerly point of Australia" provides significance to visitors. A similar point can be made for the Busselton Jetty being "the longest wooden jetty in the southern hemisphere". It also offers a range of activities and makes it possible to have a land-based ocean experience, which can be interesting to some Asian visitors as, for instance, not all of them swim.

Interviewees agree that wineries are a key point for selling ASW to Asian tourists. However, they also emphasise that the wineries are usually embedded in a broader motivational bundle and appear to be also somewhat less attractive for those who do not drink alcohol (who are not a rare minority among Asian visitors). The caves, according to interviewees, are a relevant attraction point for Asian visitors, with the qualification that this does not hold for all of them – some who come from regions with more and bigger caves seem to have markedly less interest in considering caves a key attraction point in ASW. Finally, some interviewees mention that the "high trees" have relatively lost significance over the years, but more than anything else in their role in the overall promotion. However, some see potential for revival.

*"But if you have got the Leeuwin Lighthouse ... the [Busselton] Jetty and things that really stand out as iconic and then they will go there because they want to do it as a bucket list thing." (Interviewee)*

*"I think they are looking for those nature-based experiences, so going up to the lighthouses, seeing where the two oceans meet... going into the caves." (Interviewee)*



*“For us the wineries are a key point. The lighthouse where the two oceans meet has a lot of significance, the caves to some markets are relevant, to others that have sort of bigger better caves not so much.” (Interviewee)*

## Food experiences

Expert interviewees argue that food experiences are a main driver for Asian visitors to come to ASW. This includes local produces in general and wine. Experts specifically mention seafood, chocolate, cheese, honey and olive oil.

*“Obviously [a motivation is] great food and wine. I think for the Asian market food is a very, very important element.” (Interviewee)*

*“Particularly with our Singaporean visitors we know that food is a really strong driver for them” (Interviewee).*

*“Things that interest them [Asian visitors] would be the wineries, the drink, specific types of cottage industry, making soap, making olive oil, chocolates... cheese. It attracts them; and more so, if they get to have a free tasting they will love it.” (Interviewee)*

*“Chinese visitors like the honey and the seafood, and they always must have fish and chips.” (Interviewee)*

## Winter experiences

According to experts, there is also a noticeable section of the Asian market who are interested in winter experiences in ASW. This winter experience consists of the colder (wetter) climate and the contrast with the in-house atmosphere, with the fire-element being mentioned repeatedly.

*“I think we get a few Asian tourists who like the winter because they can actually experience something that’s not hot all the time.” (Interviewee)*

*“I guess, it depends on where they come from, but certainly the Singaporeans are after a cold experience, which makes them absolutely perfect because they want to come here when ... our visitation is lower. ... We had a guy come in the other day and he said he was so excited ... because his 14-year-old son lit a fire for the first time.” (Interviewee)*

*“Some of the places where they [some visitors from Asia] stay have open fires so they can light a fire and get warmth that way rather than the opposite with air conditioning to cool down.” (Interviewee)*

## Photos and shopping

Archetypical research findings about Asian and specifically Chinese outbound tourism, the opportunities to take captivating photos and shop for authentic souvenirs or good deals are deemed to be important also for Asians visiting ASW. Opportunities to take good snaps of the above experiences that can be shared with friends, ideally online, in real time, is one key aspect that cannot be highlighted enough. The other aspect is the opportunity to shop around for souvenirs to take the feel of the above-mentioned experiences back home. It is perceived that Asian visitors



are interested in buying typical, simple Australian items. According to experts there is a particular interest in shopping for authentic chemists' products, such as soaps as they are often perceived to be cheaper than comparable items in Asian countries.

*"We see a lot of [Asian] travelers ... who specifically come along because ... [of] the Gap and the Natural Bridge. Definitely it is those iconic, photographic moments that they are really looking for; whether it be a natural scene or an interaction with an animal." (Interviewee)*

*"I think they are looking for that things that's completely different to where they come from ... like that selfie sort of spot that they can have that photo and say: I have been somewhere unique and they can brag to all their mates like 'this is where I have been'". (Interviewee)*

*"Well a lot of them also have done their homework and ... they know what they want to see and do. And they come here for the simple Aussie goods; everyday-things that they get that they buy from the shops, not necessarily high-end stuff." (Interviewee)*

## Human element

In the preceding sections, specific motivations for visiting ASW were discussed. However, it is worthwhile noting that interviewees emphasised one of the most crucial reasons for Asians visiting Australia is the "Australians," namely the desire to experience the lifestyle and friendliness of people on the Australian continent – and ASW seems to be particularly suited to deliver this Australians feature.

*"At the end of the day, when you are sitting in Asia, you have more than 100 countries to go to, and why do you want to go to Perth? They come to Perth because of the human touch that they want to experience." (Interviewee)*

*"We have wineries – ok, we have wineries all over Australia; sea food – well we got nice seafood in Thailand too; we have got caves – but there are more caves in China; we have open roads – well, you have open roads in Canada too. We really do not have anything that is totally unique [in ASW] if you ask me. But I guess what we have is Australians, so in theory we market the friendly Australian culture." (Interviewee).*

## Which major segments of Asian tourists visiting ASW can be differentiated?

Interviewees mentioned both similarities and significant differences between the Asian source markets for ASW. While from a business point of view and critical mass perspective there seems to be a strong argument to become Asia-ready rather than China-ready (see further below), interviewees were, however, able to segment the Asian visitors to ASW, and underscoring of that segment-specific knowledge is indispensable (see Figure 5). While the geographical breakdown is the most immediate way of segmenting those visitors, according to interviewees, it is not necessarily the most relevant and most useful approach. They suggested additional ways of segmentation, including differentiating visitors with lower and higher travel confidence (less vs more mature travelers), because this appears to translate into

fundamentally different travel behavior in ASW: While the more mature visitors tend to be self-drivers and like immersion into a Western context, the less mature Asian visitors (in terms of international travel experience) tend to travel more often in group- and guided contexts, with planned itineraries and are, therefore, those who might profit most from initiatives of product adaptation to their specific needs. Having said that, on average, the relative prevalence of more and less confident and experienced travelers seems to correlate with source markets.

*"I guess a more reliable way of looking at it is the level of destination awareness that the market has, but also how sophisticated those travelers are and how they like to travel. I think there is a group of Asian visitors who have got a fairly high level of destination awareness, so in close proximity. I guess I am referring specifically to Singaporean and Malaysian visitors." (Interviewee)*

Another immediate and apparently useful way to distinguish segments of tourists references distribution channels, and the respective locus of decision making, which correlates with whether tourists are free and independent travelers (FITs) or group tourists. In addition, for Asian visitors to ASW this distinction seems to relate, to a certain degree, with the distinction between more short-haul markets (such as Malaysia, Singapore and – potentially – Indonesia) and more long-haul markets (China, Taiwan, Japan, and Korea).

*"There is a big difference between the distribution channels: Is the end consumer wanting to come... or is it through an intermediary, which is like a travel agent. .... [There is a difference] because one is short-haul and one is long-haul. From Singapore, Malaysia and Indonesia they come for just a few days. But from other Asia, as in North Asia, China, Japan, Korea, Taiwan they come in groups still... that's a long-haul.... So, the long-haul people ... don't know ... our state enough ... So, the long-haul people they [more often] want to join a tour group." (Interviewee)*

Some interviewees also mentioned a religion-based differentiation between Muslim vs non-Muslim visitors, as this seems to impact on interest in terms of alcohol and food.

*"We have obviously got cultural differences between Muslim and non-Muslim tourists. So, this would dictate where you would take people and what experiences you would offer them. With Muslim tourists, you would tend not to take them to anywhere that involves alcohol and potentially you would take them not really to farms and such." (Interviewee)*

Finally, as with other markets, the difference between leisure tourists, on the one hand, and meetings, incentives, conventions, exhibitions (MICE) and business travelers on the other hand, needs to be taken into consideration. Next to other disparities which characterise these groups, decision making differs fundamentally as individual decisions by business/MICE visitors are limited to an extent. Hence, business-travel partnerships with companies and company executives are of significant importance.

With respect to a geographical breakdown, most interviewees mentioned Singaporean, Malaysian and Chinese visitors and to a certain, but minor degree, other source markets such as Indonesia and India as well. Singaporean visitors to ASW were perceived as being the Asian group with, on average, the highest destination

awareness and experience (“the most mature travelers”). They were perceived to be predominantly free and independent tourists with no language barriers, who are mostly self-drivers and have a strong interest in wine (wine tasting), as well as winter experiences as a contrast to their monotonously hot climate at home. Interviewees also mentioned the particular seasonality patterns which tend to be linked to Singaporean school holidays.

*“I have got China, but then Singapore... two different markets. Singaporeans will probably be more adventurous. They will probably do the estates.” (Interviewee)*

Malaysian visitors to ASW, are perceived as being relatively similar to Singaporean visitors, but a more heterogeneous group with somewhat less adventurous travel behaviors and more inclination to book organised tours or even day trips from Perth. Some interviewees argued that the majority of Malaysians would still request some sort of guiding when they travel to ASW. However, in terms of seasonality, similar to Singaporeans they seem to be interested in visiting during off-season periods.

*“While Singaporeans move on their own, Malaysians are neither here nor there, very mixed.” (Interviewee)*

In comparison, ASW visitors from China are perceived as travelling more in guided groups. However, interviewees mention that these groups tend to be small and intimate, and that there is a perceivable shift towards more free and independent Chinese travelers. Interestingly, although Chinese travelers sometimes have a language barrier, with limited English proficiency, they show adventurous behavior in daring to self-drive and move around independently.

*“So now we find the Chinese are really travelling more free and independent as it is called. So, they travel in much smaller tight-knit groups; it might be three or four in a family. And the major difference is that they do not necessarily rely on a tour guide. So they are probably getting more English proficient, they can hop online to book things, things like that.” (Interviewee)*

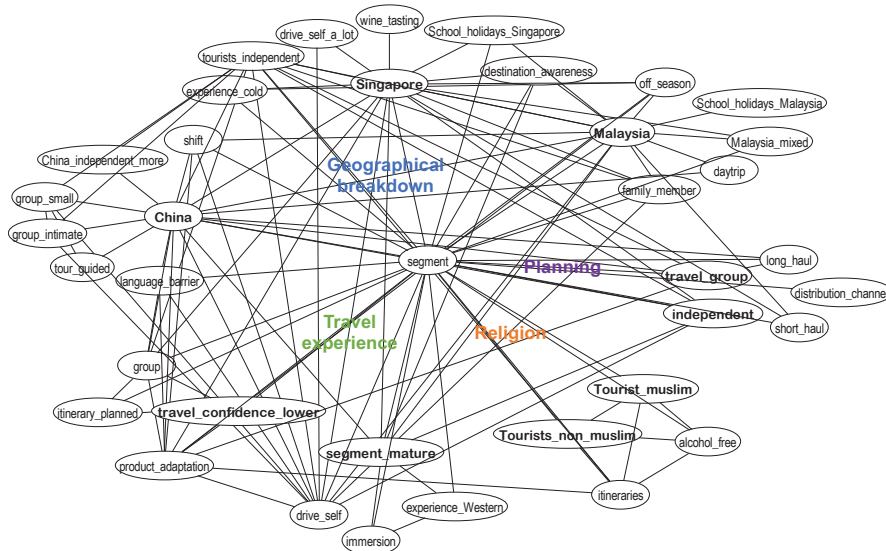
*“I hear from people who rent cars, they are saying there are a lot of Chinese coming that are self-drive.” (Interviewee)*

All these groups, but in particular ASW visitors from India were described as travelling quite often in family contexts, often having one or more family member(s) based in WA and thus WA school holidays being of importance for their seasonal travel patterns as well.

*“During the West Australian school holidays, we get lots of Indian families, travelling with usually a family member who is based in Perth and then they have got their extended families who have come over from India.” (Interviewee)*

Few interviewees touched on Indonesian visitors, but those who did referred to them as either coming on business trips or mostly taking some sort of guided tours. Similarly, some interviewees mentioned a small niche group of highly sophisticated, luxury oriented visitors from Thailand.

**Figure 5** Segments of Asian tourist visiting ASW (provider interviews)

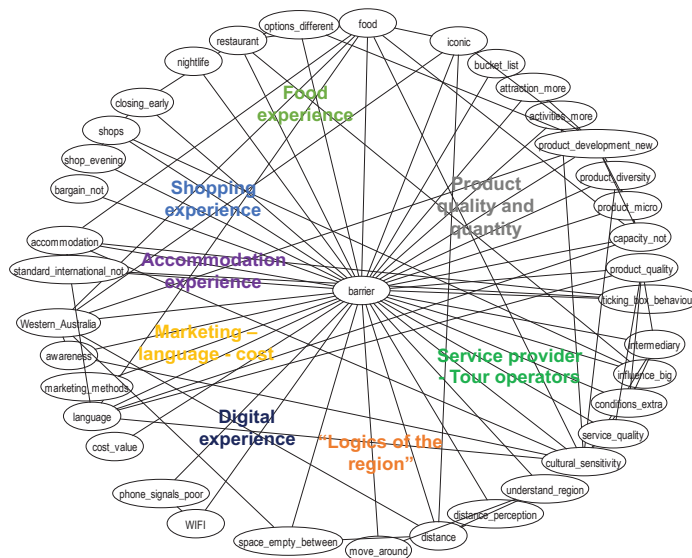


Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018); authors' design with GABEK/WinRelan.

## Barriers for Asian visitation to ASW

Interviewed experts discussed a number of features that might be conceived as barriers to Asian visitation to ASW (see Figure 6). The barriers can be grouped into specific issues around product quality and quantity, group-tour related issues at the interface between tour operators and service providers, food-related experiences, shopping-related experiences, accommodation experiences, digital experiences, issues around marketing, language and cost as well as the difficulty in fully grasping the “logics of the region,” i.e. difficulties in quickly understanding how ASW can be best experienced.

**Figure 6** Perceived barriers for strengthening Asian tourism to ASW (provider interviews)



**Source:** GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## Product quality and quantity

First and foremost, some interviewees argue that it is important to achieve and maintain consistently high quality in its offerings, which allows ASW to cater firstly to local markets, and then international markets. While the region has, comprehensively, a high-quality vocation, according to interviewees there might be cases where the high-quality paradigm is not always fulfilled in the ASW context, which consequently may constitute barriers for increasing Asian visitation to the region. Some interviewees specifically mention accommodation, seeing an issue between classifications (on paper) and what is provided in substance. They also criticise that some accommodations in ASW are not of international standard. In addition, some interviewees also mention a lack of structures capable of dealing with bigger groups, such as 100 people. And finally, and perhaps more importantly, interviewees argue that the lack of quantity of available activities and attractions can be a barrier to extended stays for Asian visitors. Therefore, interviewees plead for the development of new products to add iconic or bucket list items to the range of attractions in ASW.

*“There sometimes seems to be a discrepancy ... it is the fulfilment of what it takes to meet the criteria, but not actually fulfilling the requirement of the criteria.” (Interviewee)*

*“The biggest issue we have with the South West is that there are a lot of products but they all are ... microproducts. They are not able to cater for larger movements. ... If I were to take 100 people down there, I will be in trouble. We might go to a winery, we could go to the beach, Busselton Jetty. But that’s it.” (Interviewee)*

*“You are really looking at a one or two-night stay for the international visitor that is going there. But if you have more activities that they can do then suddenly they will decide to stay longer, and the longer you keep a visitor in your region, the more you will make out of it.” (Interviewee)*

*“We struggle to take people from the long-haul to the South West, purely because there is no iconic thing that is something that needs to be ticked off.” (Interviewee)*

## Group-tour related issues: Tour operators vs service providers

In the group market, which is very much distribution system driven, an additional barrier is also inbound tour operators (for several reasons) not integrating ASW in their itineraries. According to interviewees, reasons for non-inclusion of ASW into proposed itineraries may include a lack in willingness to compromise on the hand of service provider when in negotiations with (inbound) tour operators, lack of service quality with some providers (e.g. no willingness to do extra minutes) and lack in cultural sensitivity and understanding when dealing with Asian markets.

*“A barrier is also people like me who may stop Asian tourists from going. ... The barrier for me becomes the ground operator in the area. If they come to me with a lot of obstacles – want the money now after you place*

*the booking; sorry, if you cancel, I will not give you your money back; sorry, ... I am not going to feed the tour leader if you don't pay me; sorry that your driver has nowhere to sleep etc. etc. By the time you put all these obstacles in, it makes it too hard for me. ... If you want our [group] business and you give us all YOUR rules and regulations to deal with you, you know what, it is easier ... if I'll go somewhere else. ... The barrier is actually ... the suppliers themselves. .... We carefully choose the suppliers who genuinely want to work with us." (Interviewee)*

These statements highlight the influence inbound tour operators have on the movement of Asian group tourists by including or excluding elements into the respective packaged itinerary. The decision of where to go is in fact often made by the inbound tour operator not by the tourist themselves. What seems to highly influence inbound tour operator's decisions are a willingness to collaborate, reliability, willingness to tailor services to the expectations of Asian visitors, exhibiting a degree of flexibility and respecting a tour operator's needs and caveats.

## Food experience

While food experiences are a main driver for Asian visitation to ASW (see subchapter above), the interviewed experts argue at the same time it is possible to identify a number of barriers for Asian visitation within the context of the food experience. These barriers relate mostly to restaurants closing too early for Asian expectations and habits, cafes and restaurants not offering Asian options on their menus, and a lack of Asian restaurants in ASW. Regarding opening hours, interviewees made a point that it is the early closure that might trigger Asian visitors to opt for returning to Perth in the evening instead of staying in ASW overnight, and thus promoting day trips and reducing the economic impact of tourism in ASW. Many interviewees highlighted that many Asian visitors like having access to Asian food regularly – in parallel to their willingness to try and taste Western food. Therefore, a repeatedly mentioned suggestion referred to either increasing the presence of Asian restaurants in the ASW or offering selected Asian food options at Western styled cafes and restaurants, so that visitors can choose between Western and Asian food styles.

*"For the smaller cafes and similar, I think they must have a combination of not just the Western dishes but maybe some Chinese addition or even some curries. The menu should be able to offer in one place different options of choice of food." (Interviewee)*

*"If you create something trying to drive Chinese tourists where they come from cities that never sleep and when they get there and you cannot even have a meal ... after eight o'clock. You cannot find a Chinese restaurant to have a meal too. I think they would struggle sometimes." (Interviewee)*

*"I guess it is this kind of things where we spoke to tour operators and asked them: "Why don't you stay in Margaret River or the region [overnight]" and then they go "well, because there is nothing to see and do at night", so that's why they just come back to Perth... If it is just three hours, if I can do a day trip and a road trip then we will just come back to Perth, which means that the South West misses out, that the regional areas miss out." (Interviewee)*

## Shopping experience

It is well-known that shopping experiences are an important component of Asian outbound tourist behavior and motivation (see also subchapter further above). This means that complaints about suboptimal shopping experiences need to be taken seriously if a region is willing to increase Asian visitation. Interviewees argue that for ASW there are barriers to comprehensively fulfilling Asian shopping expectations. These barriers seem to include opening hours and the lack of possibilities to shop in the evening, as well as the 'cultural' barrier of an unwillingness to bargain. As Asian tourists love to have the feel of having made a good deal when they buy things, interviewees suggested that it might be useful to consider ways of allowing tourists to achieve that feel, such as including special offers, special deals, getting some part of the package for free etc.

*"And also the early closing of the shopping centres [is an issue]. They [Asian tourists] want to shop. They come here, they go full on for touring and all that. And in the evening, they want to go shop and they don't understand why is it closed." (Interviewee)*

*"The Asian people they like to bargain, they like to ... 'can we have this for a bit cheaper'. And the providers say 'no'. So sometimes this behavior puts you off. ... Even if you want to buy it at the requested price, it is a normal thing for Asians to bargain – it is part of their culture that they want to ask for a bit of a bargain. But because of the attitude that's been shown to them they will walk away, it puts them off." (Interviewee)*

## Logics of the region

Interviewees mentioned distance and more specifically travel distance as main barriers for Asians to visit ASW. However, in further qualifying this evaluation many interviewees referred particularly to the "perception of distance". The problem with this perception does not necessarily seem to be biased towards being too big, but rather towards underestimating the distance. This underestimating of distances does not only refer to travel to or from ASW to Perth but also to distances within the region. This misconception can lead to Asian tourists not adequately planning their trips, ending up staying too long in their cars and being disappointed with the overall experience. Therefore, a suggestion of interviewees was to make an effort to help visitors to best experience the region, i.e. to better convey the "logics" of the ASW experience, including the spatial component. This is first and foremost an issue of information and how this information is delivered. However, it also includes a plea to make further steps in removing technological barriers to handle self-drive tourism logistics more easily, including navigation with smart phones. Interviewees expressed a strong plea to improve phone coverage and wireless coverage in ASW in order to promote satisfied Asian visitation.

Importantly, interviewees stressed that the perception of travel distance is relative to the length of stay. If there were enough reasons to embark on an extended stay in ASW, the travel distance would become much less of an issue, relatively speaking.

*"I think [a barrier for Asians visiting ASW are] potentially the drive times and understanding of how the region fits together." (Interviewee)*



*"Possibly the distance [is a difficulty for Asian visitors in ASW]. I think a lot of people do not understand what it takes to get to the South West and then around the South West. ... They are very much used to having everything at their fingertips." (Interviewee)*

*"I think the biggest downfall is in some of the South West regional areas we do not get very good phone signals so that can be a bit of a problem and not everywhere you get accessible WiFi. ... Not everyone offers free WiFi [in ASW]." (Interviewee)*

*"We often say: 'No, hold on a minute. If you want to go down to Margaret River we would suggest a minimum of two nights, because it takes you to and from six hours. That is, if you are not stopping, you are just driving through. But no one wants to be driving through as there are many things to see once you pass the highway. You have got to stop and to see what the places have on offer. But unfortunately, many [Asian visitors] do not realise that. ... We have got to emphasise that ... if you want to enjoy the South West, please stay for at least minimum two nights, because of the drive.'" (Interviewee)*

*"The main issue is the accessibility because you have got to drive for four hours. ... The reality is ... if you had more offers there which are internationally ready ... then the distance won't really make a difference because people would stay there longer. ... If I stay there for three or four nights the drive would be nothing because I would have three full days and two half days where I can actually immerse myself in the South West and its facilities. So, it is about making sure there is enough to do there to warrant for the longer stay. And the longer a destination can keep their clients, the more the economy of that location is going to prosper." (Interviewee)*

## Awareness, language, cost/value

Interviewed experts emphasised three additional barriers for increasing Asian visitation to ASW, that is low destination awareness for ASW and Western Australia in general, language barriers, and barriers related to a mismatch of costs and value. All these might not necessarily apply to the same extent for all Asian visitors, but might affect some of them.

*"The first [barrier] is just general awareness: There is such a low awareness of what is available in the South West. Part of that is that there is not a lot of product promoted at an international level to engage them [Asian visitors] in exploration of the region. ... Destination awareness and availability of product are barriers at the moment and also what the tourism understands what is available here." (Interviewee)*

*"At the end of the day, it is all about the money. It is not necessarily about whether they want it or even how you package it, it is whether they have the means to have it. This is the argument." (Interviewee)*

*"Maybe the traditional methods that the majority of accommodation and travel and tourism operators rely on for their marketing might not be methods that connect with that market." (Interviewee)*

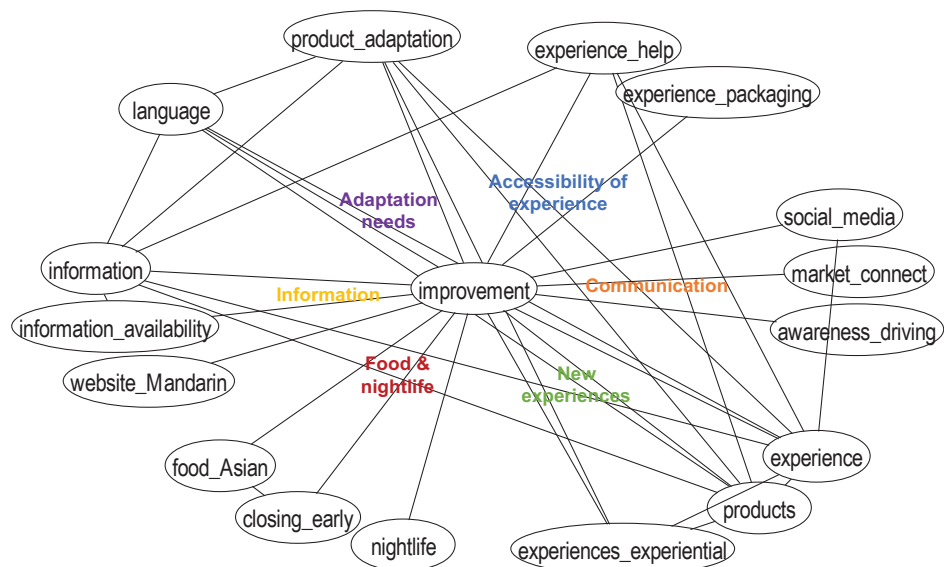
## Needs for improvement

Partially elicited by the above-discussed perceived barriers, partially reaching beyond, interviewees suggested a number of avenues to improve the visitation experience for Asian visitors in ASW and for attracting a greater number of Asian visitors in the medium term (see Figure 7). The key point, according to interviewees, is that many Asians decide based on value perception, as most do, but given their background their sensibility seems to be even more pronounced. Thus, it is all about improving the value and value perception of the ASW experience(s) (compared to price), with the difficulty of what constitutes value can differ between people and groups of people.

*“The Asian often are from situations that we really need to understand, where really nobody cares about them. They can’t trust the systems where they come from traditionally, ... they can’t trust anybody. So, they are very much into working very hard to save whatever little money they have. ... Anyway, so the dynamics and everything is very simple to put it down in one word. Value. If it’s good value, they come. If it’s not good value, they don’t. And the word value means very different things to different people from different parts of the world, including our local suppliers. We think we are giving them value, when they don’t think so. That’s where the difference come from.” (Interviewee)*

The suggested areas for improvement include product adaptation to specifically address the needs of Asian visitors, increasing the accessibility of ASW experiences, improving communication towards Asian markets, increasing the availability and accessibility of information, creating new experiences and products and addressing perceived barriers in terms of food and nightlife.

**Figure 7** Perceived improvement needs for strengthening Asian tourism to ASW (provider interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## Adaptation needs

Although some interviewees were keen to point out that there is not necessarily a lot of substantial difference between Asian visitors and international visitors from other parts of the world, interviewees also suggested targeted efforts in product adaptation and specific consideration of language barriers as means to encourage augmented Asian visitation to ASW, and generation of more satisfied Asian tourists. Product adaptation mostly refers to considering cultural differences and showing cultural sensitivity. Measures of improving multi-language availability of information might refer either to technological solutions (website, headsets) or traditional information provision (either via multi-language competent staff or hardcopy information). Such initiatives would, in particular, be valuable to first-time visitors from Asia and visitors with less travel experience. Product adaptation opportunities will be discussed more specifically in a dedicated subchapter.

*"I think the people who are first-time visitors to the region, particularly if we are looking at China, these visitors there is a bit of work to be done about how we provide for those visitors." (Interviewee)*

*"I think the one thing is you do not need to go all out with your cultural sensitivity, but it is having that understanding, having a bit of nod to it like the chop sticks and tea, I think that always goes down well." (Interviewee)*

*"We were talking about those multi-lingual headsets the other day and I think we really need to look at offering something like that, but I think we need to do it as a group, rather than all of us individually going out and doing it." (Interviewee)*

## Accessibility of experience

The barrier of getting across the experiential logic of ASW has been discussed above. Interviewees agree that there is a need to help Asian visitors in their approach to experiencing ASW. According to interviewees, tangible ways to improve the accessibility of the ASW experience can include the pre-packaging of experiences in a modular fashion, in specific itineraries or similar experiential packages.

*"I think we need to do a lot better job of pre-educating people before they arrive about possible experiences and then just really promoting on what our strengths are and sticking to it and then having ... a way to deliver those pre-packaged experiences to really work on independent travelers." (Interviewee)*

## Communication

In order to drive awareness, interviewees argue that the connection of ASW's tourism industry with Asian markets could be further improved, particularly by making strong use of social media channels while taking the particularities of the Chinese market into consideration.

*"I also think ... it is about getting those sites up to speed in terms of how do they connect with China, first of all digitally. There is a great firewall in China, so many standard social media channels are not actually working in China." (Interviewee)*

*"We need to probably collectively get better at driving awareness." (Interviewee)*

## Information

Interviewees also argue that information availability and information provisioning can be improved. Interviewees mention very basic issues, such as many visitors not understanding that “Margaret River” is a township and not only a river, or people having difficulties knowing how to get the best experience within a region, for example via improved information provision is particularly relevant for non-English proficient Asian visitors (see the discussion about “the logics of the region” further above). It also includes suggestions of having websites in Mandarin, increasing accessibility of Chinese visitors.

*“So, if you want to target Chinese tourists, then these are going to be some of your challenges: Is your website in Mandarin? If it is in Mandarin, do you have staff at the counter that can [in some way] service your customer?” (Interviewee)*

## Food and nightlife

As discussed above, there is concern amongst interviewees around the lack of availability of Asian food options in the ASW (breakfast, more than anything else) and the relatively restricted opening hours of restaurants and cafes. For the sake of improving the “nightlife experience,” according to interviewees, longer opening hours should be considered.

## New experiences

Many experts mentioned that the ultimate key to fostering further success of ASW in the Asian markets is to be found in new product development recommendations. Interviewees argue that despite the need to consider a degree of ticking-off behavior and a focus on photo taking opportunities in (some of) these markets, in the medium term, new product development should focus on increasing experiential products which try to make the core competences and USPs of the region even more accessible to Asian visitors. Moreover, increasing the quantity of (high-quality) products offered and specifically adding new products that can accommodate bigger groups might encourage increased lengths of stay in the region and improve the ability to target bigger groups as well. New product development opportunities will be discussed in more detail below.

*“I think probably what the region has not done particularly well is pulled together itineraries for people that shows them how it can be done [i.e. how the region can be experienced].” (Interviewee)*

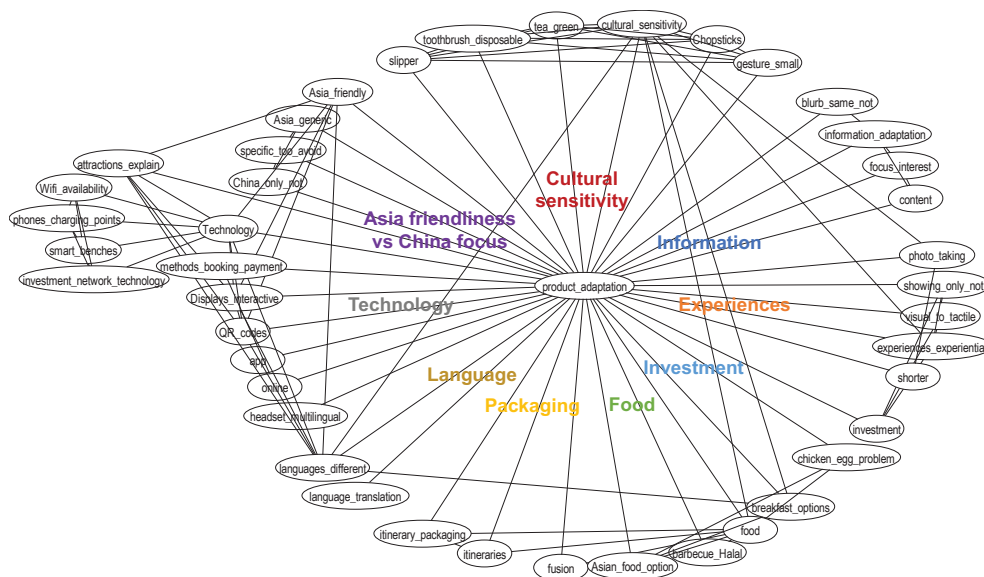
*“It is all about value perception: The value perception of being in some little mini resort, or eco resort where they only have seven chalets and all the food is from that area and you have got the wood fire, it is all about perception.” (Interviewee).*

## Product adaptation opportunities

A major suggestion for improvement repeatedly pointed out by expert interviewees was the opportunity for adapting existing products to better meet the specific needs of (some) Asian visitors. According to interviewees, there are manifold ways of achieving product adaptation, and many of them can and should be combined to achieve higher satisfaction among visitors (see Figure 8). However, many of the interviewed experts also emphasised while product adaptation is great to show a welcoming behaviour towards a specific market, there is no need to over-do it to become too focused on a single market (e.g. China), compromise authenticity or forget about the regional core competencies and key strengths that make the competitive position of the region. Interviewees also underscored that product adaptation, especially if only approached as a tick-box, is no substitute for product quality, which comes first and constitutes the basis for success.

*“There are many ways to cater to markets, but your product has to be able to stand up on its own before you even think about how to tailor it to another market.” (Interviewee)*

**Figure 8** Perceived opportunities for product adaptation in ASW for Asian tourists (provider interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## Asia friendliness vs China focus / necessary investments for adaptation

Interestingly, some interviewees put out a word of caution regarding an overly strong focus on becoming “China focused”. In order to avoid unnecessary dependencies on a single market and avoid alienating other Asian guests, these experts suggest more generic “Asia friendliness”. They also argue that given the current market shares, no single Asian country makes up a really significant part of their business and therefore, from a supply side perspective, the business case is hardly there to focus on a single country specifically. Product adaptation requires investments that are in many cases hardly justified by the current market shares of specific Asian countries; the chicken-egg problem that might arise is somewhat eased if the broad context of Asian visitors is considered. Interviewees held that people from a diversity of Asian countries are visiting ASW and hence this diversity should be somehow accounted for with technology (e.g. by providing QR-code-based multilanguage information).

*“The catch is, you have to capture all of Asia without being too specific on one nationality because you then tend to alienate other ones. ... And it is not just looking to become more ... China friendly rather than Asian-friendly. Some of them are looking to become more China-focused.”*  
(Interviewee)

## Cultural sensitivity

A key message of interviewees was the advice to consider increased efforts to explicitly show cultural sensitivity and embrace some of the unspoken expectations when dealing with Asian markets. These suggestions mostly concern small gestures such as providing green tea and chopsticks in rooms and when eating, as well as things such as providing slippers and disposable toothbrushes in an accommodation context. Showing cultural sensitivity, perhaps most significantly, has also got a food and beverage component, which will be discussed as a separate point.

*“I think you can do it [product adaptation] quickly and fairly inexpensively, just a nod to understanding culture is all that is required. Accommodation, I am sure, is realising the value of the disposable toothbrush and, if they can afford it, slippers and little things like that and just acknowledging what they are expecting. ... Little things just as welcome information in the majority of languages is always an advantage.”* (Interviewee)

## Experiences

Interviewed tourism providers and experts claim that the type of experiences Asians are after should allow for worthy photo opportunities. While the critical importance of photo taking opportunities is beyond dispute, some interviewees also maintain that increasingly Asian visitors would like to have short but intense experiences that go beyond just looking and should include tactile elements. To put it plainly - it seems to be no longer sufficient to show things, to allow for photos and gazing, but Asian visitors want to try and touch. (Time-) Efficiency in the experience, which means that experiences should be offered in shorter configurations as well, remain critical.



*"We have talked to them about having a shorter tour that only goes for an hour as opposed to three hours, which provides for key highlights, allows for photo opportunities, because that's what they are requiring from their product ... and that has been really well-received."*  
(Interviewee)

*"I think people are moving away from the visual to the actual tactile. I think there is a slow move towards that."* (Interviewee)

## Food, and food packages

The interviewed experts argue that one of the most relevant areas of product adaptation for Asian visitors to ASW (and beyond) is food and beverages. On the one hand, interviewees maintain that the various and geographically dispersed food and wine experiences could be better packaged in different modules and itineraries to make them more easily accessible for Asian visitors. On the other hand, Asian visitors like to taste Western food, but they also like to have easy access to Asian food even when travelling in a foreign country. Interviewees argue that they hear most criticism about breakfast and lack of non-English breakfast options on breakfast menus. While Asian visitors seem to be happy to try these breakfast options, they do not like having the same every day and interviewees suggested adding more Asian and more varied alternatives. In general, two ideas were brought up: having more Asian options in established Western-styled eating places and having more Asian eating places in ASW. According to interviewees, a further point in Asia readiness relates to the ability to provide Halal food to visitors.

*"From a hotel point of view... including some drinks [that Asians consume] and some breakfast options like dumplings that do not amount to a huge cost."* (Interviewee)

*"There was a Chinese film crew down here. ... There was a large group, and one of the most surprising things, I think, to us was they wanted to eat a lot of Chinese. So, I think the businesses got a hold of it at the end."*  
(Interviewee)

*"In the food side, one of the biggest feedback that we get when people come to Australia is the limitation of the breakfast buffet. ... Eggs and sausages and bacon and mushrooms, baked beans and all your cereals and fresh fruit. That's pretty much it. ... If you eat that every day for five days then they cannot see it any longer... What we did... we talked to the hotel and said apart from all the normal things you do can you add a fried rice on day 1, fried noodle on day 2, a soup noodle on day 3, so there was something different. ... The fact that they had something different changed the whole thing and people were really happy with the menu and to see that change. ... [The hotel was happy as well] because it was more about having more carbohydrates which are cheaper than having a lot of bacon ... so the cost was less."* (Interviewee)

## Language and information

According to interviewees, given the currently contained shares of Asian visitors in ASW it will be relatively unrealistic to see multi-language or Mandarin staff on many receptions within a short period of time. The availability of such staff in regional areas also seems to be an issue. Therefore, they suggest considering alternative ways of dealing with the language barrier, including providing written information in different languages, handing out cheat sheets with multi-language information to reception staff, and – most importantly – increasing multi-language readiness with the help of technology. The latter includes the use of QR codes on signage, menus and other type of information, multilingual headsets and the use of interactive displays which can accommodate multiple languages at attraction points or information points in towns.

*“And you only need four or five Asian languages and you have got most of the [Asian] market. That is something that I personally would like to see as a visitor, that is, attractions with multi-language visibility and explanations.” (Interviewee)*

According to the interviewees, it is crucial that when multi-language information is provided, information is not simply translated and the same blurb used for all visitors but that content is adapted as well. It is argued that divergent interests are considered and thus different aspects are emphasised. If Asian visitors show less interest in historical aspects at a specific attraction points (because historical context is mostly significant to domestic visitors), other elements might be presented more extensively.

*“It is about tailoring the language. So, not necessarily just going with the same blurb that we have about the site for our general market. It might be that we would have to step back and get some advice about actually this is what they are interested in and certain terminology might not be appropriate as well. ... I think it is about targeting the things that they enjoy most. ... Because they are the things that they want to do. It is the content that you focus on.” (Interviewee)*

## Technology

The product adaptation area of language overlaps with technology, because technology can be an efficient means to provide for multi-language information. This includes devices such as headsets giving audible information in multiple languages, interactive displays giving visible multi-language information, QR codes delivering information onto smartphones, apps helping in translation or comparable online features. However, technology has a role in its own right in terms of promoting product compatibility with the needs and wants of Asian visitors. According to interviewees, Asian visitors tend to be very tech savvy and hardly willing to renounce their heavy use of internet-connected devices. Therefore, a major suggestion in terms of product adaptation was to get ASW more ready for the digital age and the digital natives, including improving mobile phone connection throughout ASW, providing free wireless wherever possible, installing phone charging points at different locations or promoting similar initiatives that indicate and promote digital readiness.

Interviewees agree that providing free Wlan (which is reliable and has high capacity) is not necessarily cheap in the first instance, but it contributes to attracting Asian visitors as co-marketers, because they will, with high likelihood, post pictures and selfies in real-time. The value and savings in marketing will, according to interviewees, likely over-compensate the costs of installing and providing the service to visitors.

One of the most successful attraction points for Chinese visitors in Western Australia, Caversham Wildlife Park, can be considered a good practice in this regard.

*"I definitely think there is a need of embracing a bit of technology in dealing with these [Asian] markets. ... whether it be QR codes or interactive display boards at [visitor] centres and things like that. ... Also, having QR codes with attractions to explain what things are, I think that can be a very easy way to do it in different languages, you can do it in Korean, Chinese, Japanese." (Interviewee)*

*"There are things that are called 'smart benches', which are benches for sitting on, and they have the capability of charging a mobile phone, WiFi and also displaying data statistics. ... That should be something available at every visitor centre, the ability to charge a phone, to use the WiFi, that can even be solar powered .... There are many different ways to do it, but you need to give people a chance to post immediately on Instagram and similar platforms." (Interviewee).*

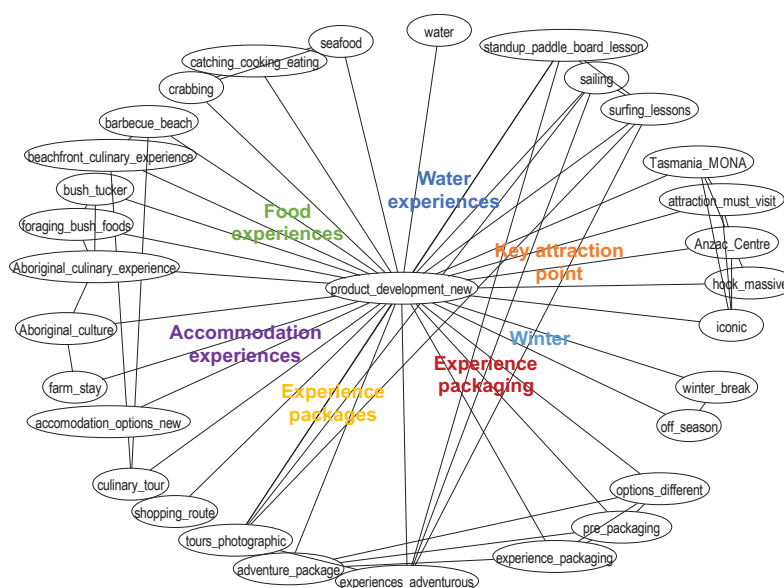
## Product development opportunities

In the following, first interviewees' opinions about general areas for new product development are discussed, which is then followed by a focus on the creation of iconic attraction points as well as nature based attraction points in ASW.

## Areas of new product development for Asian visitors in ASW

Next to relatively minor interventions into existing offers and products in the area of product adaptation, interviewees also brought up several ideas of developing new products in the ASW region which might help to grow the Asian market (among other markets). These suggestions for new products focused on the areas of coastal/marine experiences, food experiences, accommodation experiences, the creation of (additional) key attraction points and the creation of experience packages (see Figure 9).

**Figure 9** Perceived opportunities for product adaptation in ASW for Asian tourists (provider interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## Water experiences

As has been discussed earlier, the clean and clear ocean is a very significant attractor for Asian visitors in ASW. Hence, interviewees argued that there is potential to offer a broader range of accessible and authentic water-based experiences to Asian visitors. According to interviewees, the water aspect might be combined with elements of the Australian lifestyle, offering visitors the opportunity of being introduced to or experiencing the water-related components of this life-style. This may include surfing and stand-up paddle board lessons and opportunities for sailing. Developing water-based experiences partially overlaps with the creation of new food experiences (with regard to seafood experiences) as well, as is discussed further below.

*"You cannot easily get such a clear water inside Asia [...] In Southeast Asia it is easily muddy." (Interviewee)*

*"I believe we can do a bit more targeted marketing rather than just say 'come to Australia to see a kangaroo' [...] we could push water experiences and light adventure experiences." (Interviewee)*

## Food experiences

According to interviewees food is at the same time a potential barrier for Asian visitors in ASW and a main attractor. Interviewees argue that there is wide space to create new food experiences to further strengthen this particular attractor. A couple of different ideas can be identified but they mostly come back to two key lines of argument: first, new food experiences that more strongly combine the beach and water experiential elements with food; second, turning the local sourcing of fresh and healthy produce in ASW into a stronger experiential element for visitors.

As far as the water/beach experience amalgamated with food is concerned, interviewees call for an increase in beachfront culinary experiences. A prototypical case in point might be the White Elephant Beach Cafe at Gnarabup Beach, which allows for casual beachfront dining without impacting strongly on the landscape. Next to cafes, according to interviewees, barbecue opportunities on or close to the beach can be another element to consider. Such offers allow the combination of two or three major drivers of Asian visitors coming to ASW, namely beach, beach views, ocean and food. In addition, they also provide an atmosphere that is closely linked to the Australian lifestyle, which is another driver for Asians visiting ASW. Furthermore, interviewees identified fresh seafood as a major driver for Asian visitors. Therefore, they hold that adding new seafood experiences can help to support Asian visitation to ASW.

Regarding the local sourcing of food, interviewees suggest making this an experiential factor, to provide stronger and more easily accessible evidence for locally sourced produce as well as turning it into a first-hand experience. For instance, according to interviewees it would be highly interesting to allow visitors, in an assisted manner, to catch their own seafood, cook it themselves and then eat it. According to interviewees, such a combination can be a very rich experiential package for all those Asian visitors driven by the desire to sample fresh seafood in ASW. It would turn the local value chain into an experience, providing an unbeatable guarantee for freshness. Similarly, interviewees promote Aboriginal culinary experiences (bush tucker) to be highly attractive products for Asian visitors. Again, the foraging for bushfood and then

cooking and eating them enriches a local produce theme in combination with the cultural element, providing a highly accessible and real experience for visitors.

*“‘Catching a crab for tourists’ ... first catching the crab, then cooking the crab, then eating – and catching it fresh, so nice.” (Interviewee)*

*“And then we are looking at beach barbecues – it is a unique experience having shrimp on the barbie ... on our beachfront.” (Interviewee)*

*“The other thing that I know is attractive is going out and foraging for bush foods.” (Interviewee)*

## Accommodation experiences

According to interviewees, promoting new accommodation options has the potential to incorporate a relevant experiential component of the overall ASW experience for Asian visitors. This particularly refers to farm stays, with this accommodation option providing a valuable opportunity to deliver regional food experiences, as well and bringing a lived “regional produce” experience. Interviewees argue that high quality farm stays align with the positioning of the region, and seem to be valuable to the Asian market as well.

## Key attraction points

Some interviewees also emphasise the need to develop additional attraction points for Asian visitors in ASW. According to interviewees, these should become key attraction points, and in this context reference is repeatedly made to the ANZAC Centre in Albany. It is lauded as an amazing attraction, however is not particularly relevant to the Asian markets. Interviewees suggest developing something similar in terms of quality and refinement but with stronger appeal to the Asian markets. The envisioned attraction point should have the potential to become iconic for Asian markets, and provide an opportunity to display some of the key attractors and regional core competences of ASW. Interviewees considered looking at MONA in Tasmania as a good practice example of the impacts of an iconic attraction point, and of how such an iconic attraction point can be developed.

*“The MONA museum put Tasmania on the map. That is what we need down south. You have the ANZAC Centre, which is a sensational attraction. I think it is one of the best things we have, but it only appeals to a specific market, ... which is not Asia. There needs to be something that will really hook in the Asian market and an example is the Lobster Shack in the Coral Coast. They need something like that in the southern region that becomes a must-do, have-to-visit-no-matter-what-you-do.” (Interviewee)*

## Winter experiences

Interviewees also are of the opinion that there is room for new product development in the area of winter experiences in ASW. Strengthening attractiveness of the winter offer would not only offer opportunities to even out imbalances between peaks and off season, but also increase the attractiveness of ASW in the Southeast Asian markets

without winter experiences at home, such as Singapore and Malaysia. According to interviewees, delivering a high quality, unique winter experience, supported by new product development is an untapped opportunity for increasing the attractiveness of ASW for Asian visitors.

## Experience packaging

Interviewees argue that one of the highest priorities should be to bundle product packages to make the diversity of the ASW experiences more accessible to visitors. One way of packaging could be the development of themed routes that allow visitors to know how they should move through ASW in order to have the expected theme-based experience. In contrast to mere lists or unordered maps, routes are a good way of providing integrated information about the travel component and the experience component. According to interviewees, potential routes interesting to the Asian markets can be shopping routes, photographic routes or culinary routes; and these routes do not necessarily need to be limited to the FIT market but can also be delivered in a guided version for tourists interested in having a higher degree of guidance.

According to interviewees, it is important to allow some, though not exaggerated, flexibility in the pre-packaged products, including different modules or degrees of intensity. For instance, interviewees called for the development of adventure packages of varying intensity for the Asian markets. They argue that Asian visitors are interested in more adventurous experiences, however, their interest spreads over a range of intensity levels and this diversity should be reflected in the pre-packaged offers. Pre-packaging in this case should not be confounded with guided delivery; these packages should be constructed in a manner that they are suitable for the FIT market as well.

*"We could have an adventure package where you can add the style of the adventure ... - soft adventure, hard core adventure - ... and I guess the premium adventure or hard core adventure would be sky diving."*  
(Interviewee)

*"Having a bulk of ... options to choose from and then they can choose the five out of those 20 to create their own itinerary."* (Interviewee)

*"More of those slight adventurous experiences ... more opportunity for people to actively engage in that outdoor space, for instance, photographic tours through the natural environment ... learning to stand-up paddle board. That sort of experience: Walking trails in the natural environment... sailing on the harbour. Doing [short] surfing lessons, that sort of thing."* (Interviewee)

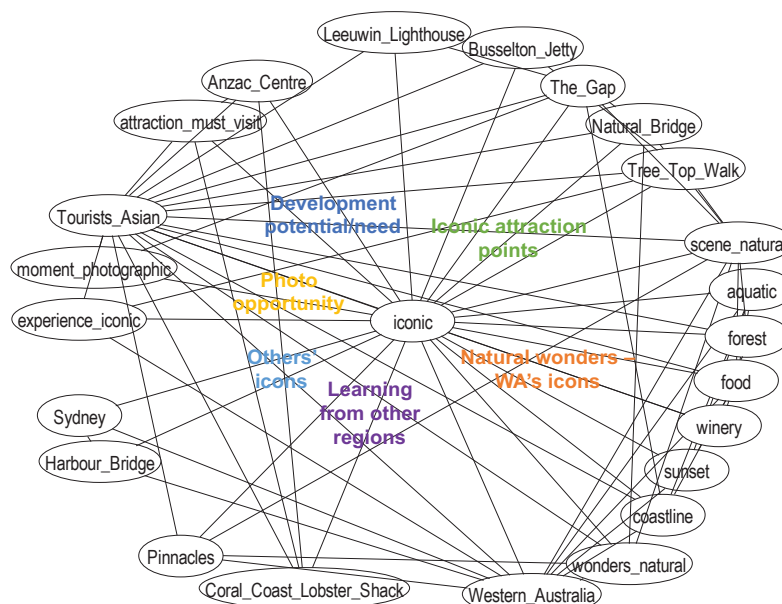
*"The Southwest has so many shops, so many products, so many businesses. I believe if some of them come together and say 'this is a package, if you go from here to this shop and this shop, then you will get a special discount'. 'If you make sure you come to this shop to buy ... some chocolate, ... this shop for some wines, some confectionary, then you can get a discount of 10 per cent.... From one shop to another, you can create a package.'" (Interviewee).*



## Developing iconic experiences for Asian visitors in ASW

With regards to new product development, one particular matter of interest to interviewees was the creation and enhancement of iconic experiences in ASW (see Figure 10). Interviewees mostly agreed that Asian visitors are particularly attracted by such iconic experiences or what could be called “hero experiences,” which are defined by a sort of social consensus within the visitor’s peer group on what are typical and unique people, places and events. Interviewees mentioned existing iconic attraction points, emphasising natural wonders as ASW’s, and WA’s, main icons, and suggested development opportunities, focusing on the need to have specified photo opportunities and to learn lessons from other regions in creating iconic experiences.

**Figure 10** Developing iconic experiences in ASW for Asian tourists (provider interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

Interviewees emphasised that iconic attraction points have relevance to Asians visitors. For Asian visitors, iconic experiences seem to be an opportunity to extensively take photos. Why is that? According to interviewees, value, or value for invested time, and money, is important to Asian visitors and perceived high value particularly tends to be linked to unique experiences that are recognised as such by their peers. Value is also generated via the value placed by others on a specific experience, in particular those whose value is important to the visitor and its social context. Hence, it is important that an experience and its uniqueness can be conveyed to others in the form of a coherent ‘story’. Retelling a story can be facilitated if the story becomes as tangible as possible and is anchored somewhere, for instance in the form of a photo. In the here briefly-described cycle of social recognition of value, icons play an important role because they are recognised important attraction points. Hence, there appears a need to identify and/or create potential icons and leverage them by intelligent social media activity. It is also good to recall that icons

a created, specifically by erupting social attention: Creating an icon today usually means embedding an attraction point into a significant story and then moderating a hopefully evolving photo and social media craze aimed at re-enacting and sharing the experience. While dynamics on the consumer side can be influenced and triggered, it is vital to remember that icons are ultimately determined by the consumer and dynamics at the consumer side, not the supplier.

*“And it sounds to me that the driver for visitors is the interest in re-enacting that same photo that has become popular.” (Interviewee)*

*“To me it is that, the photo opportunity, they seem to like that the best and to say that they have been here because it is iconic.” (Interviewee)*

Being an icon or not is not a dual status, but obviously, the iconic status of attraction points can be located on a continuum, and differ for each market. Interviewees mention a number of attraction points in ASW that can already be considered to be somewhat iconic for Asian visitors. The list includes attraction points such as the Leeuwin Lighthouse and the Busselton Jetty, the Tree Top Walk, as well as The Gap and Natural Bridge in Albany.

Beyond specific attraction points, interviewees considered natural wonders to be ASW's and WA's icons. They mentioned the combination of coastline and sunsets, forests, wineries and food as iconic.

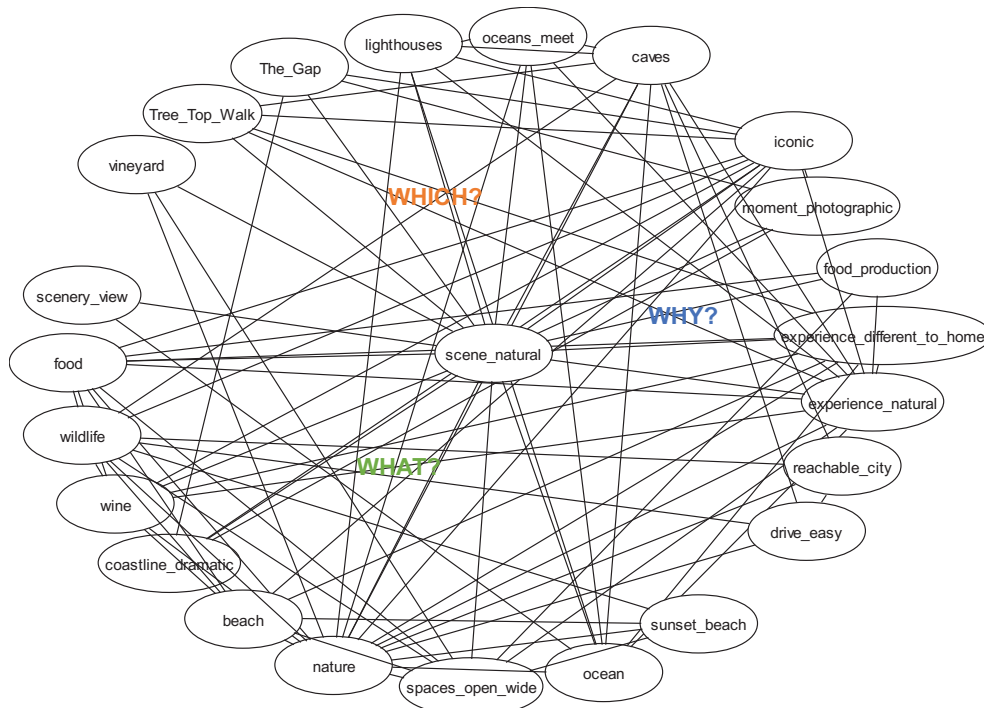
*“I think we tend to build our icons around experience rather than what I would call buildings as such. [...] As opposed to some other destinations where in Sydney I guess the icon is a building as such.” (Interviewee)*

According to interviewees, other regions in WA offer examples of how iconic attractions for Asian visitors can be created or can emerge, including The Pinnacles, the Pink Lake and the Lobster Shack in the Coral Coast region (some of these examples are discussed further below). Overall, Sydney's iconic complex of Harbour Bridge and Opera House have extraordinarily strong appeal on first-time Asian visitors to Australia.

*“We struggle to take people from the long-haul [Asian markets] to the South West purely because there is no iconic thing that is something that needs to be ticked off.” (Interviewee).*

## Developing nature-based experiences for Asian visitors in ASW

As already discussed above, interviewees hold that nature-based experiences are a key motivation for Asian visitors to travel to ASW. Figure 11 details what type of nature-based experiences they seem to be after specifically, which existing attraction points are particularly popular and why this might be the case.

**Figure 11** Developing nature-based experiences in ASW for Asian tourists (provider interviews)

Source: GABEK Association Graph showing main mental associations of interviewees based on stakeholder interviews in ASW (own data collection, 2017, 2018), authors' design with GABEK/WinRelan.

## What

According to interviewees, the sought-after experiences include the natural sceneries such as the dramatic coastlines, wildlife, the ocean, beaches and sunsets on the beach as well as the wide open spaces in general.

## Which

ASW's attraction points that are able to embody the above features include, in the opinion of interviewees, places such as The Gap and lighthouses (in particular, the Leeuwin Lighthouse), the Tree Top Walk, the vineyards and caves.

## Why

Interviewees argue that these experiences are sought-after if they are perceived as different from home, iconic and if they provide good photographic moments. Seeing how the local food is grown, before being eaten, appears to be an appealing experiential component as well. Overall, it is considered to be helpful, if these natural experiences are perceived as accessible.

## Concluding remarks

Interviewed tourism providers and experts argued that there are significant differences between Asian visitors coming from different source countries. However, they also held that even more pronounced differences in travel behavior and decision making might arise depending on whether tourists are free and independent travelers (FITs) or group tourists. Moreover, coming from a supply perspective, some interviewees argued that, at this point in time, it is more realistic and justified for providers in ASW to become Asia friendly than focusing product development or adaptation on a single source market.

According to interviewees, Asian visitors seek ASW's fantastic natural scenery and find the local wine and food production appealing. They are motivated to visit ASW by ocean and beach-related activities, winter experiences, specific attraction points and the friendly people. Interviewees identified a number of weaknesses in terms of Asia readiness in ASW, including the digital experience, the interface between tour operators and service providers, weaknesses in terms of food and accommodation, as well as a difficulties explaining the logics of the overall tourism experience of the region. However, the biggest barrier to further increasing Asian visitation to ASW seems to be the low destination awareness. Hence, most importantly it is necessary to define a very clear and unique answer to the question "why should I visit ASW?"; that is, the proposition must become clear and unique. Moreover, it will be helpful to increase visibility of this proposition by adding a strong, "iconic" key attraction point that is rooted in regional core competences, while at the same time has appeal to Asian markets.

Distance is both an attractor and barrier for Asian visitation to ASW. It is an attractor as ASW is relatively close to Perth compared to other tourism regions in WA, and thus allows for a relatively accessible tourism experience. At the same time however, perceived distance is also a barrier to Asian visitation to ASW. However, the distance is not that relevant if a visitor rents a car and – even more importantly – if the visitor stays longer than just one or two days. In the case of staying at least three, if not four or five days within ASW, the effort and investment of travel time is very much reduced in its impact. Hence, paraphrasing some of interviewees' statements, a main objective must be to extend the average length of stay of Asian visitors in ASW, which would immediately benefit the ASW economy – with the best way of doing that being to increase the number of activities available to Asian visitors to motivate longer stays. According to interviewees, such activities can be developed in the areas of marine/coastal experiences, food experiences, accommodation experiences, winter experiences and by better packaging the variety of existing experiences into understandable modules.

In other words, most expert interviewees argued that new product development is more important than product adaptation to Asian visitors, while also arguing that better adapting the products to specific markets (especially if it is just done by means of a tick-box approach) does not compensate for further improving the quality of offers. Having said that, interviewees agreed that intelligent product adaptation in the sense of particularly paying attention to product features that are important to Asian visitors and allowing for multi-language information with the help of technology, such as QR codes, can be a step towards increasing visitor satisfaction, positive word of mouth promotion and thus can be helpful in triggering co-marketing from visitors. Such product adaptation should be driven by an ambition to account for cultural sensitivity, by a desire for efficiency for ensuring a photogenic character of experiences as well as by providing for an increasingly requested experiential appeal beyond the sole photo opportunity.



# Provider

survey

## Aim of analysis

An online survey was administered to service providers in ASW to investigate their experiences in dealing with Asian guests and to collect their opinions on how to improve destination and business attractiveness for these visitors.



## Data basis

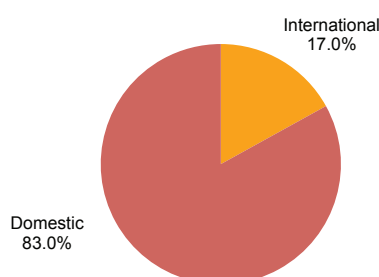
In June and July 2018, with the support of Australia's South West Inc. and the Margaret River Busselton Tourism Association, an online survey was distributed to tourism providers in ASW. The survey was promoted through newsletters and direct mailings. A total of 38 providers participated in the survey, with 7 participants not completing the whole survey and answering every question. Participants included accommodation providers (41%), tour providers (15%), restaurants/bars (22%) and 'others', including attraction points, wineries, event planning (22%). They were located in the Margaret River Region (41%), in the Southern Forests and Valleys Region (25%), in the Bunbury Geopraphe Region (16%) or in the Great Southern (12.5%). 41 per cent of participating businesses had a maximum of 10 employees, 47 per cent had 11 to 50 employees and 12 per cent had more than 50 employees.

# Results

In the following, results from the provider survey will be presented with the help of descriptive statistics (for closed questions) and GABEK association graphs (for open questions).

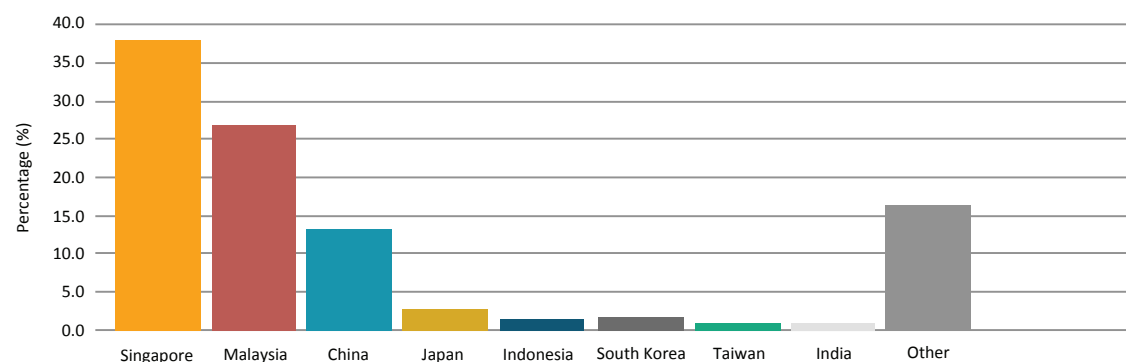
As per Figure 12, the participating providers declared that on average 17 per cent of their clientele is of international origin. Against this background, Figure 13 indicates that Asian countries account for a relevant portion of this international share, with people of Singaporean origin (37%), from Malaysia (26%) and China (13%) being particularly numerous. In comparison, other Asian countries account only for minor shares (below 3% each).

**Figure 12** Share of international clientele (provider survey)



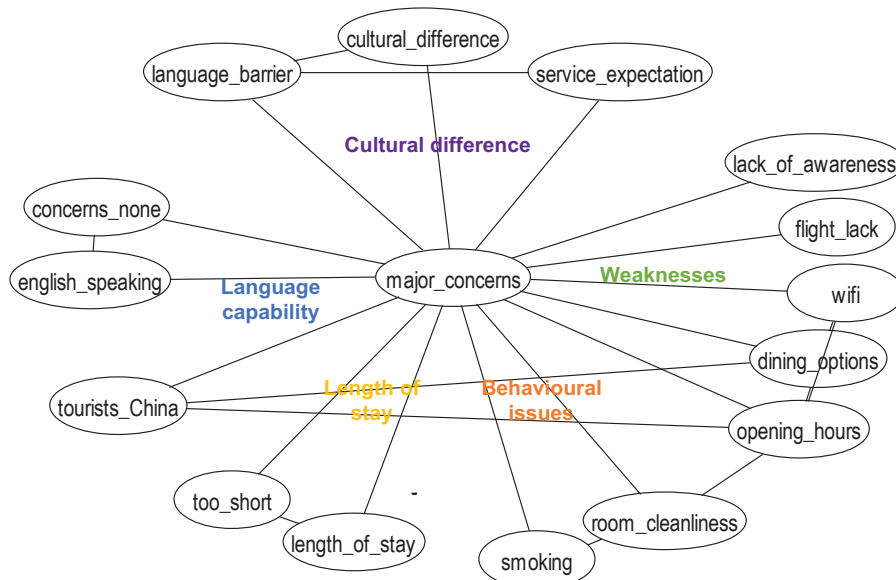
Source: Online survey with tourism service providers in ASW (own data collection, 2018).

**Figure 13** Share of Asians among international clientele (provider survey)



Source: Online survey with tourism service providers in ASW (own data collection, 2018).

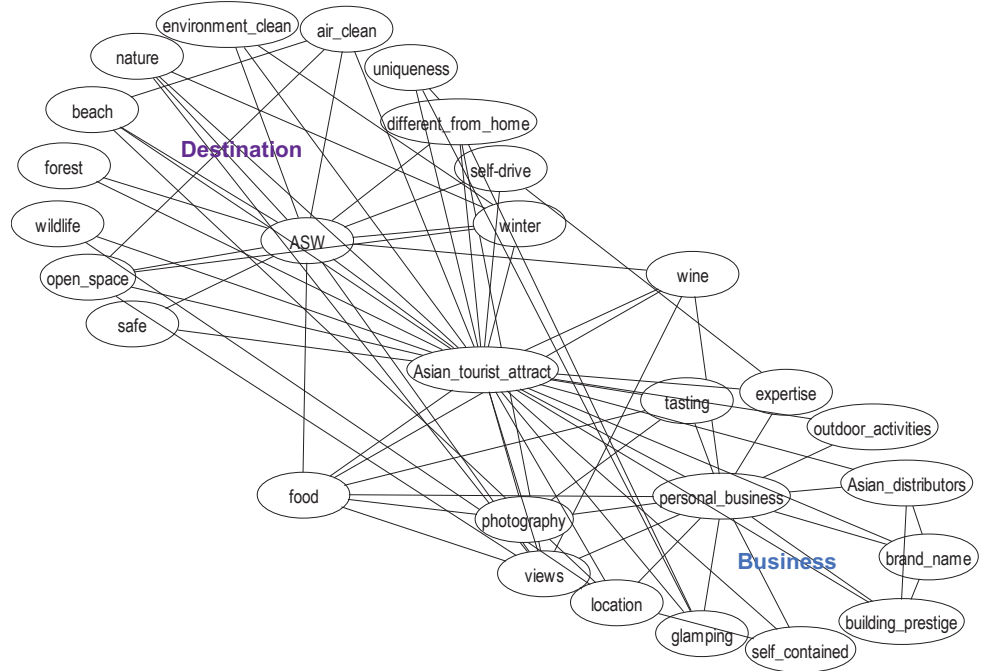
In an open response item, participating providers from ASW were asked to name concerns and/or difficulties they currently face when dealing with Asian tourists. Figure 14 represents a GABEK Association Graph with some of the main keywords provided by participants in this regard. Participants mentioned difficulties in dealing with cultural differences, language barriers and dissimilar service expectation. However, some of the respondents did not report any concerns with respect to Asian source markets with good English proficiency, arguing challenges or differences might be more notable with visitors from China. Respondents stated some negative observations in terms of how clean rooms are left and had concerns regarding the relatively short duration of stay of some Asian visitors to ASW. Participating providers identified weaknesses of ASW in attracting Asian visitors in the lack of destination awareness in some of these markets, in the lack of direct flights (to Perth and/or Busselton Airport), the lack of WiFi access for visitors, in a lack of dining options and in generally restrictive opening hours within the region.

**Figure 14** Major concerns and/or difficulties in dealing with Asian tourists in ASW (provider survey)

Source: GABEK Association Graph showing main mental associations of respondents based on online survey with tourism service providers in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.

Participating providers were asked to openly list which features contribute to attracting Asian visitors to the ASW region, and to their businesses more specifically. Figure 15 is a GABEK Association Graph displaying some of the keywords mentioned regarding the attractiveness of the destination (upper corner on the left) and the attractiveness of respondents' businesses (lower corner on the right). In terms of ASW's regional attractiveness, features highlighted included the clean environment and air, as well as the uniqueness of the environment compared to the situations some of the Asian visitors experience at home. Additional mentions included the possibility to have self-drive experiences, winter experiences, the region's safety, beaches, forests, wildlife and open spaces. Wine and food are cited as major attractors both on the side of the region and as far as individual businesses are concerned. Moreover, respondents also noted that photographic settings, views, the location and specific outdoor activities, as well as tasting opportunities attract Asian visitors to their businesses. The type of accommodation provided (e.g. glamping) and even the architecture seem to play a role in attracting Asian visitors, particularly if they carry a connotation of prestige. Prestige can also be communicated via a strong brand name. Last but not least, participants stated that their businesses' attractiveness also benefits from collaboration with Asian distributors.

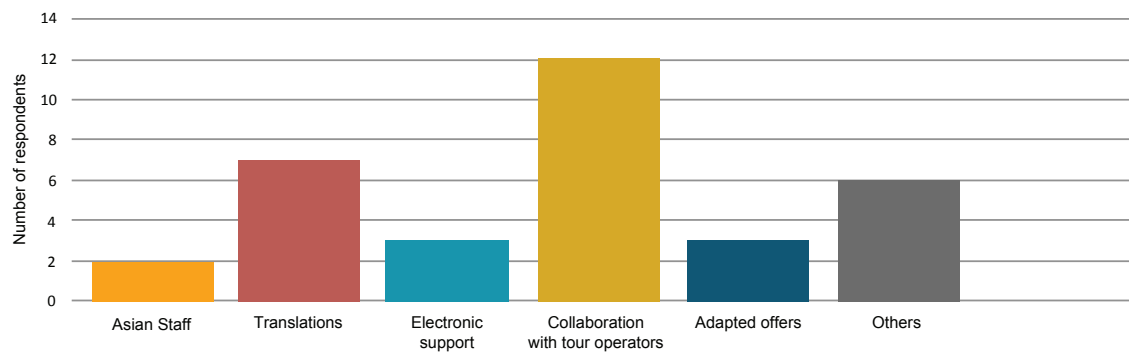
**Figure 15** What attracts Asian tourists to the ASW region and ASW businesses (provider survey)



Source: GABEK Association Graph showing main mental associations of respondents based on online survey with tourism service providers in ASW (own data collection, 2018), authors' design with GABEK/WInRelan.

Figure 16 reports on current actions carried out by participating ASW tourism service providers in an effort to make offers and services more accessible to Asian visitors. The items respondents mentioned most often include “collaboration with tour operators” and “translations”. Some (few) are also providing electronic support to Asian visitors (in terms of translation etc.) or have adapted products to specifically satisfy the needs of Asian visitors. Few employ Asian staff.

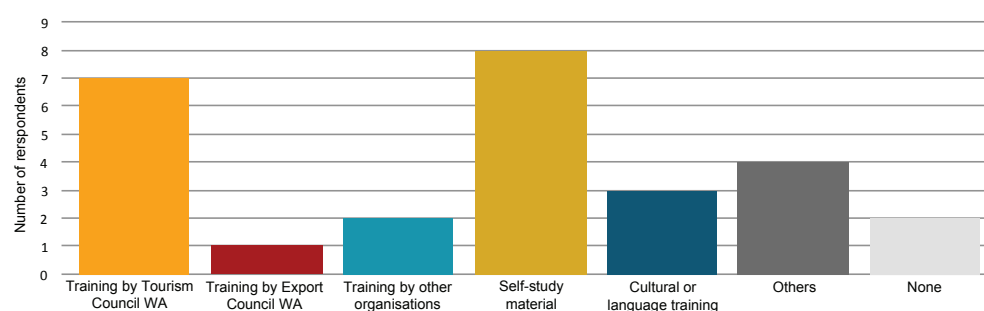
**Figure 16** Actions currently carried out by providers to make offers more accessible for Asian visitors (provider survey)



Source: Online survey with tourism service providers in ASW (own data collection, 2018).

Some of the responding ASW tourism service providers also participated in “Asia ready” training to improve attraction to Asian markets. According to Figure 17, self study materials were the most popular programs entered into, followed by training modules offered by Tourism Council WA, and then ‘others’ and types of cultural or language trainings.

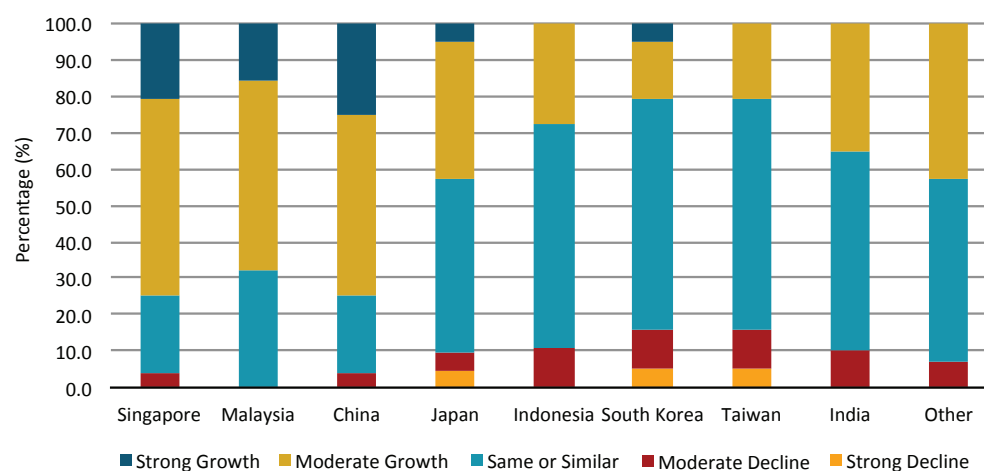
**Figure 17** Participation in Asia ready training programs (provider survey)



Source: Online survey with tourism service providers in ASW (own data collection, 2018).

Looking into the future, participating providers were asked to report their relative estimates regarding future developments of some specific Asian source markets in terms of importance for their businesses over the next 10 years. Participants attributed the strongest growth potential to those three markets which are already the relatively strongest at the moment, namely Singapore, Malaysia and China, as seen in Figure 18. Notably, China attracts the highest relative share of people describing the future development as “strong growth”. In general, a moderately positive assessment dominates for all markets, with “same or similar” or “moderate growth” being the most often chosen categories. In the set of countries considered, future dynamics seem to be evaluated least positively for South Korea and Taiwan, although differences to other countries do not tend to be very substantial.

**Figure 18** Estimates about future development of specific source markets (provider survey)



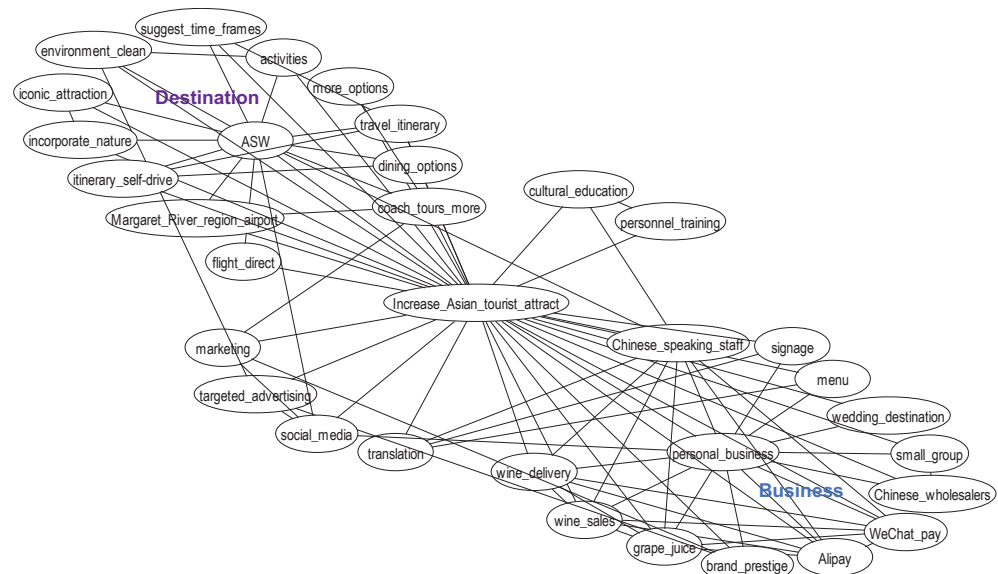
Source: Online survey with tourism service providers in ASW (own data collection, 2018).

Survey respondents were asked to offer ideas about what could be done to attract more Asian tourists to the ASW region and their respective businesses. This question was framed to allow for open responses, with Figure 19 displaying a GABEK Association Graph with some of the most prominently mentioned keywords. The upper right corner exhibits ideas to increase the attractiveness of the destination, while the lower right corner gives ideas to increase the attractiveness of respondents' businesses. According to responding ASW tourism providers, marketing, targeted advertising (especially on social media), translation, and trained personnel are necessary to increase attractiveness of both the region and their businesses. Some also suggested that visitors should be prepared for the experiences, receiving a sort of cultural crash course.

On the regional front, respondents suggested measures such as more direct flights and support for the Busselton Margaret River Airport. They added that the uniquely clean environment should be better incorporated into products and offers, and ideally form the basis for a newly created iconic attraction point. Participants also saw scope to provide visitors with more guidance in terms of self-drive itineraries and in planning their time to ensure they can realise a great experience. Finally, respondents argued that the amount of activities and dining options offered in ASW should be increased. Next to self-drive, some held coach tours to be another option for bringing Asian visitors into the region.

Focusing on the corporate level, respondents argued that to increase the attractiveness of their businesses to Asian visitors, they should allow for wine sales and wine delivery to the home countries of their visitors, although this is not necessarily easy to organise; they might consider adjusting the taste of some of their wines to the specific desires of Asian visitors (e.g. grape juices without alcohol); they should invest into brand prestige, support preferred payment options particularly of Chinese visitors (such as Alipay or WeChat pay), collaborate with Asian wholesalers, employ Mandarin-speaking staff, improve information in terms of menus and signage and focus on specific growth areas such as weddings or small groups.

**Figure 19** What could be done to attract more Asian tourists to the ASW region and businesses in ASW (provider survey)



Source: GABEK Association Graph showing main mental associations of respondents based on online survey with tourism service providers in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.





# Visitor

interviews

## Aim of analysis

Asian visitors in ASW were interviewed to capture their motivations to visit, their experiences, as well as sources of satisfaction and dissatisfaction with their experience in ASW. To improve product development and product adaptation initiatives, it is paramount to develop a good understanding of the perceptions, feelings and thoughts of visitors, especially in a cross-cultural context. We cannot assume that perceptions and need structures are the same for all source markets; it is necessary to understand market-specific needs, wants and impediments in order to make informed decision about which of those should be considered in specific product development recommendations.

## Data basis

In 2018, 55 qualitative interviews with Asian visitors were conducted at different tourism attraction points in ASW, including Busselton Jetty, Leeuwin Lighthouse, Margaret River Visitor Centre, Busselton Visitor Centre, The Gap, Albany Visitor Centre, Historic Whaling Station, and the Tree Top Walk. Interviewees came from a range of different countries, including Bhutan, Brunei, China, India, Indonesia, Japan, Korea, Malaysia, Myanmar, Nepal, Philippines, Singapore, Sri Lanka and the island of Taiwan. Interviews were conducted either in English or in Mandarin, as requested by the interviewee.

Interviews lasted between approximately 5 to 20 minutes each, and were conducted in a semi-structured and generally open questioning style to allow respondents to convey their opinions in an unconstrained manner. Openness is a key requirement of qualitative interview techniques as it allows interviewees to voice their own problem definitions, descriptions of reality and suggestions for solutions (Gephart, 2004). Questions revolved around topics such as reasons for visit, concerns, places visited, satisfaction, memorable experiences, suggestions for improvement as well as their general travel orientation.

The interviews were recorded, transcribed (all Mandarin interviews were transcribed into English) and systematically analysed with the GABEK/WinRelan method (Zelger, 2000).

# Results

The following outlines the results of the visitor interview analyses, presented in a combined format consisting of summarising GABEK association graphs and verbalising summaries enriched with direct quotes from the interviews. The subsections focus on interviewees' opinions about:

- the motivation of Asian tourists to visit ASW;
- places visited by Asian tourists in ASW;
- current barriers and suggested improvements to the Asian tourism experience in ASW.

## Motivation of Asian tourists to visit ASW

The Asian visitors interviewed provided a number of motivations to visit ASW, justifying these reasons further, and also providing clear indications of where they preferred to go when in ASW (see Figure 20). The latter will be discussed in more detail in the subsequent subsection.

### General motivations to visit ASW

For the interviewed Asian visitors, the main motivations to visit ASW include its clean environment, blue skies, beaches, the scenery and the natural as well as outdoor experience in general. They also mention food as a major motivation, as seen in Figure 20.

*"I love the scenery, landscape and natural places here." (Interviewee from the Philippines)*

*"As my friends described how beautiful the beach is, the blue sky .... I was very excited. And she also told me that I will be seeing a lot of kangaroos around. ... It is exactly what I expected." (Interviewee from China)*

*"I am Asian, so I love food." (Interviewee from Malaysia)*

*"I would say that food in Australia is popular for its fresh seafood, specifically fish and lobster. Therefore, they should probably build more restaurants that serve fresh local seafood." (Interviewee from China)*

*"[I am visiting here for] the scenic places and Busselton Jetty and Cape Leeuwin. ... and the caves ... and wineries. We want to go to the wineries." (Interviewee from Singapore)*

*"[I am attracted by] the clean and blue ocean. A lot of my friends told me that WA has beautiful beaches, and this is one of it. Apart from that, WA is also popular for its wineries, which triggered me to visit one of the winery farms in Margaret River as I love to experience and enjoy the wineries." (Interviewee from Taiwan)*

*"I would also love to visit the cave as my friends posted a few photos on social media which look really appealing to me." (Interviewee from China)*

When asked why these elements are appealing, interviewees highlighted the natural environment, food and culture provide for a different experience from what they have at home. Interviewees also mentioned that their friends, and in general word of mouth, was paramount in choosing to visit ASW.

*"As an Asian ... I want to experience different groups of people, like foreigners who speak English, who live differently, and eat differently. We want the experience in the other people's way, not in the Asian way, so that's why I come to Australia." (Interviewee from China)*

*"I personally enjoy trying new things... I like National Parks ... and hiking." (Interviewee from Singapore)*

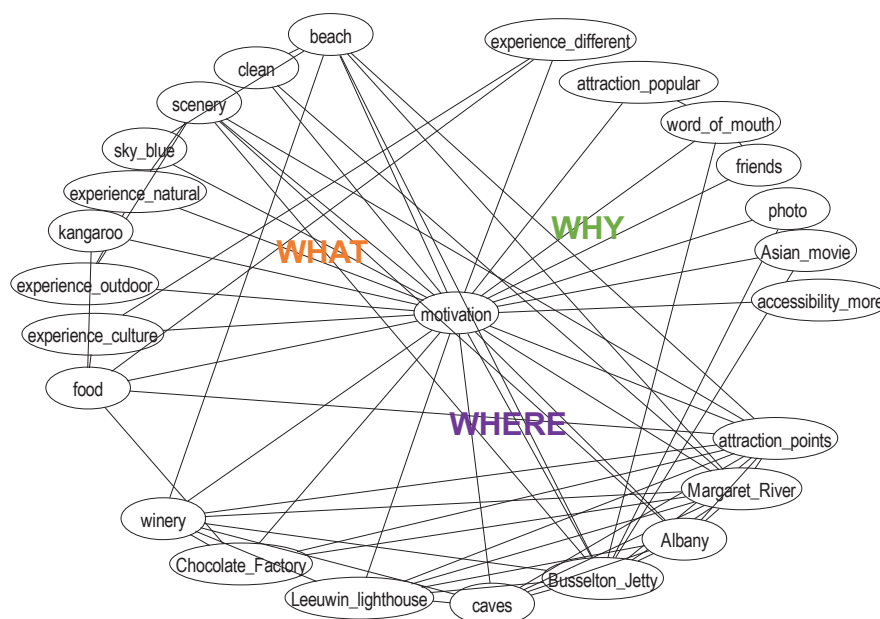
*"I like how the tourist attractions are not very crowded like the typical tourist attraction. In here, we are able to fully enjoy the scenery without any disturbance. It is very comfortable and relaxing. We love to experience and travel in this way. Especially people from Hong Kong would more likely enjoy this place because Hong Kong is a very populated and busy city. If we travel, we often travel to a location that is less populated, chilled and slow pace." (Interviewee from China)*

*"Our friends, who stayed here, highly recommended me to visit ..."*  
(Interviewee from China)

*"A lot of my friends recommended me to visit here." (Interviewee from China)*

Furthermore, opportunities to take good snapshots, to visit attraction points that are known to be popular, that are more easily accessible, and those featured in movies appear to drive motivations to visit amongst Asian visitors.

**Figure 20** Asian tourists' motivation to visit ASW (visitor interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan; all keywords mentioned at least two times.

## Nature as a central motivation to visit ASW

The above indicates that nature is a major driver for Asian visitors to visit ASW. Therefore, the associations surrounding this motivation deserve a more in depth analysis (see Figure 21). Figure 21 reconfirms that having nature and outdoor experiences are important travel motivations for Asian visitors in ASW. In particular, interviewed visitors declare that the clean, unpolluted, quiet and well-preserved environment attracts them, which is in stark contrast to their nature-experiences in their home countries of China, Korea and Japan, which may be disturbed by high population densities, strong human influence and pollution.

*"I would love to experience the nature, as we rarely can experience it in China. The area is very clean and not polluted which I enjoy the most. In addition, it is much less polluted here than in China, which enables me to be able to really enjoy the beautiful nature."* (Interviewee from China)

*"I think the government did a really good job in maintaining and preserving the nature."* (Interviewee from China)

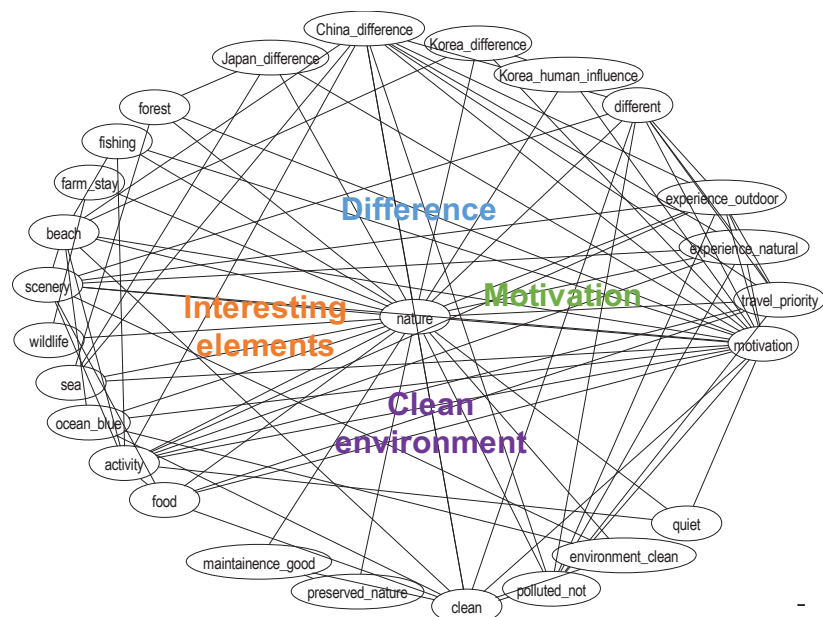
*"In Korea, people just made the nature, because the land is really small. ... It is all handmade."* (Interviewee from Korea)

*"We enjoy Margaret River, because the surrounding area is very chilled, quiet and relaxing. A lot of nature and factories and farms for us to visit."* (Interviewee from Taiwan)

According to interviewed visitors, particularly appealing components of the ASW nature experience include locally sourced food (which is associated with nature), beach, blue oceans and forests, wildlife, activities in nature such as fishing but also accommodation linked to local produce such as farm stays.

*"Our family has created memorable moments during our farm stay at Margaret River."* (Interviewee from Malaysia)

**Figure 21** Nature as a motivation for Asian tourists to visit ASW (visitor interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.



## Places visited by Asian tourists in ASW

The interviewed Asian visitors mentioned a number of places and attraction points they liked visiting in the ASW region (see Figure 22). These places included, first and foremost, places such as the Leeuwin Lighthouse, the Busselton Jetty as well as wineries, the Margaret River Chocolate Factory and some caves in the Margaret River region. In addition, beaches and the Margaret River town centre were repeatedly mentioned. Asian visitors also frequently cited nature-based attraction points in the Great Southern and Southern Forests and Valleys areas, including the Tree Top Walk, Greens Pool in Denmark and The Gap in Albany.

*"Which attraction point has been the most memorable? The whole trip, Margaret River, Albany, Busselton Jetty, or Mammoth Cave, Leeuwin Lighthouse, the whole area." (Interviewee from Korea)*

*"We have been to places around Denmark, like there is some called the Elephant Rock. It is quite amazing, very giant rock features there; and the Greens Pool, which was again very friendly because otherwise you can't straight away get into the ocean, but this is quite safe." (Interviewee from Sri Lanka)*

*"We have been to the Busselton Jetty and the caves, that is the main thing: Mammoth Cave and the Chocolate Factory. ... This is what made us go there." (Interviewee from India)*

*"They [my friends] want to buy wine for their parents as well. So, we go to wineries." (Interviewee from Korea)*

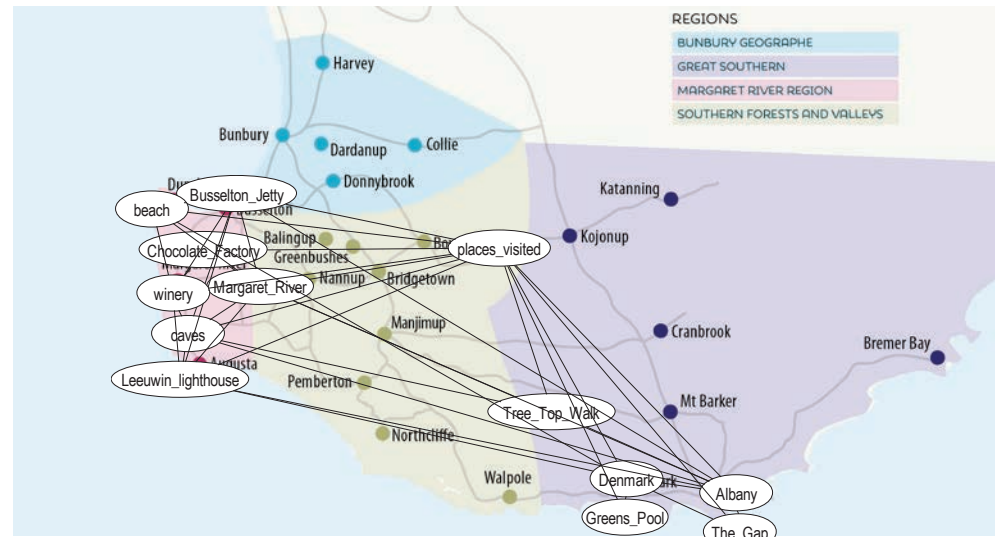
Regarding itineraries, some visitors take day trips to the Margaret River area, others use Margaret River, or sometimes Busselton, as a base station for hub and spoke movements for two or three nights. There is also a group combining a visit to the Margaret River Region with visiting the Great Southern (Albany, Denmark) and Southern Forests and Valleys. Some visitors even mention that they combined a visit (departing from Perth) to Margaret River, Pemberton and Albany with a trip to Wave Rock in one rectangular itinerary.

*"We first went to Wave Rock, Albany, Pemberton, and then Margaret River." (Interviewee from China)*

*"We have been to the Busselton jetty, the Leeuwin Lighthouse and a cave as well. I would love to come back next time and stay overnight ... in the South West, slowly exploring other tourist attractions." (Interviewee from Taiwan)*



**Figure 22** Mindmap of ASW places visited by many Asian tourists (visitor interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan; all keywords mentioned at least two times; map: ASW.

## Associations with the Busselton Jetty



Source: CCO Creative Commons Licenced (<https://pixabay.com/en/water-sea-sand-sky-beach-jetty-3235930/>).

As alluded to above, Asian interviewees visiting ASW consider the Busselton Jetty to be a major attraction point. It is interesting, and might be revealing to better understand what creates and perpetuates a strong attraction point. Figure 23 displays some of the main associations Asian visitors report with the Busselton Jetty. Asian visitors argue that the Jetty is a well-known and popular attraction point that has been recommended to them by peers, and that they have been intrigued by the online research conducted and the photos seen.

*"I did research online about the history and saw the photos, which gave me a good idea how it will look like." (Interviewee from China)*

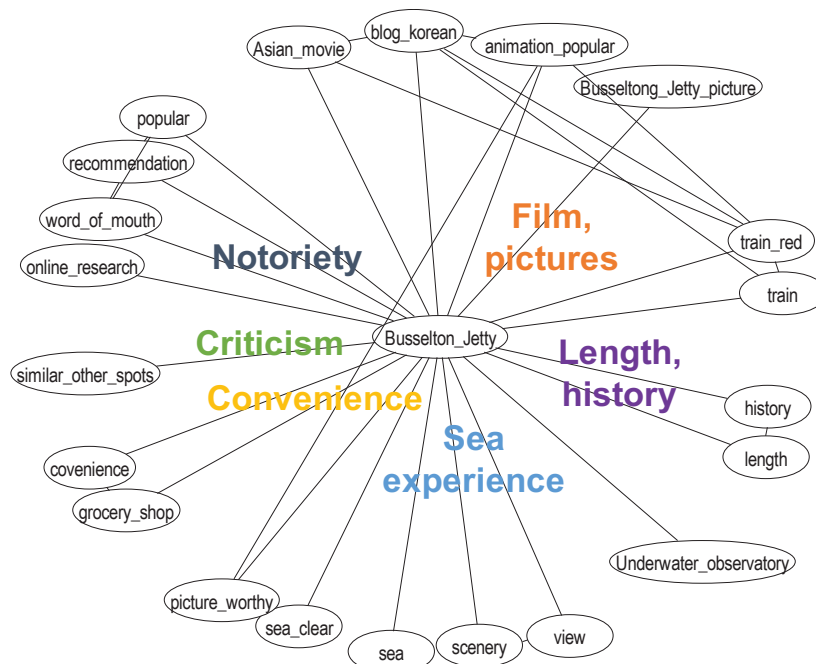
Asian visitors comment that the length of the Jetty (the longest Jetty in the Southern hemisphere), its history and also the opportunity to have a sea experience without the need to swim or to get their feet wet is attractive. They also mentioned the views, the clear sea and the picture-worthy scenery, as well as the Underwater Observatory at the end of the Jetty. Interestingly, some Asian visitors also mentioned the convenience of some grocery shops near Busselton Jetty.

*"Compared to other areas in the South West, the facilities and convenience level in Busselton are much better because there is a convenience store for us to buy grocery and food is easy to find." (Interviewee from China)*

However, almost all interviewed Japanese and Korean visitors also provided an additional reason for visitation, namely that they wanted to enact a famous scene from Hayao Miyazaki's 2001 Japanese animation film *Spirited Away*, which is said to have been inspired by the Busselton Jetty and its red train. This film, including its inspirational sources, is repeatedly mentioning on Korean blogs, with photographs of Busselton Jetty on the internet seeming to be a major attractor as well. The role of the film in attracting Japanese and Korean visitors to the Jetty emphasises how stories influence travel choices by providing opportunities to re-enactment film-like scenes.

*"I expect the Jetty to have the red train, because I have seen this definition on an Asian movie. ... I just saw it and I really liked the movie. And I just read some blog in Korean and they say that ... the director of this movie got inspired by this train. So, he put the train and the sea in the movie... It is a quite popular movie." (Interviewee from Korea)*

**Figure 23** Asian tourists' associations with the Busselton Jetty (visitor interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.

## Associations with the Leeuwin Lighthouse



Source: CCO Creative Commons Licenced (<https://pixabay.com/en/lighthouse-cape-leeuwin-1104195/>).

A similar story can be told about the Leeuwin Lighthouse, which is another major attraction point for Asian visitors in ASW. As Figure 24 indicates, the Leeuwin Lighthouse is associated with notions that turn it into a significant place (see below), a fact that has been particularly emphasised by Chinese visitors.

One major element that contributes to the perceived significance of the Leeuwin Lighthouse seems to be its positioning at Cape Leeuwin, which is narrated as “the point where the two oceans meet”. In addition, its location at the most South-Westerly point of mainland Australia also turns it into an iconic place.

*“I think the Leeuwin lighthouse is very attractive because Chinese people like historic and iconic; and especially this point which separates the Indian Ocean and the Pacific Ocean. Many Chinese people, like me, we are always interested in things like this. ... particular points ... the very South-Western point of this land, something like this.” (Interviewee from China)*

*“[Cape Leeuwin is about] the views and also where the two oceans meet. ... In general in the South West, we are also interested in winery and chocolate ...” (Interviewee from Brunei)*

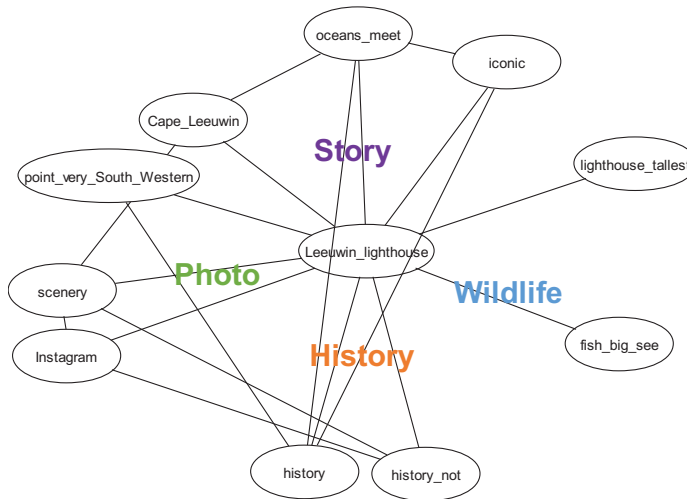
Due to this narration, the Leeuwin Lighthouse makes it relatively easy for Asian visitors to understand and communicate the worth in visiting it. The storyline of being a particular place is further strengthened by being the tallest lighthouse on mainland Australia.

*“This is the tallest lighthouse in the whole of Australia, and this is really interesting for people to come.” (Interviewee from China)*

*“Back in China, I would recommend people to come to this lighthouse, ... because it is a very particular lighthouse.” (Interviewee from China)*

All these elements, but also its surrounding scenery turn the Leeuwin Lighthouse into a picture-worthy and photogenic place. Not least, Cape Leeuwin is a good spot to see migrating whales, which is an attractor for Asian visitors as well.

*“The Cape Leeuwin was the memorable place in the South West, ... due to the sky, the lighthouse and the sea. ... [At Cape Leeuwin] we are just taking photos for their Instagram” (Interviewee from Korea)*

**Figure 24 Asian tourists' associations with the Leeuwin Lighthouse (visitor interviews)**

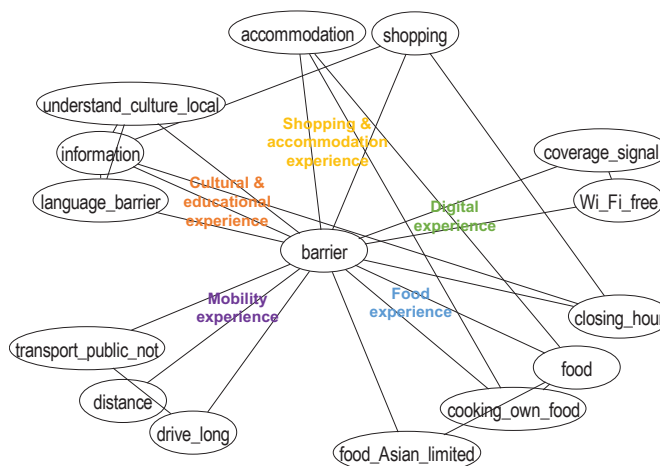
Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.

## Barriers and suggested improvements to the Asian tourism experience in ASW

The interviewed visitors mentioned a number of current barriers for Asians visiting ASW (see Figure 25) and areas of improvement to further strengthen their experience in ASW (see Figure 26). These suggestions included improved shopping experiences, infrastructure (digital and transportation), information and communication, activities, as well as food and coastal/marine experiences.

### Barriers

Figure 4.6 exhibits barriers for a fully satisfying Asian visitor experience in ASW, if not barriers to visiting ASW altogether.

**Figure 25 Current barriers to further improve the ASW experience for Asian tourists (visitor interviews)**

Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.

## Shopping and accommodation, cultural and educational experience and mobility experience

According to interviewed Asian visitors, current barriers to a perfect ASW experience include limited shopping experiences, particularly limits in tight opening hours, as well as limited choices in accommodation. Some visitors also tended to complain about the lack of very new accommodation. In addition, interviewees mention that due to a sometimes-existing language barrier, it is not always easy for them to have a great cultural and educational experience as they cannot necessarily fully grasp the significance of the places visited. Finally, the long distances and long drives appear as a barrier to some, in particular as there are no fast public transport options available – which is in contrast to the situation in certain Asian countries.

*“I guess for my family it is a bit hard to experience camping or something that is very Aussie, whereas the younger ones can. So, for them [my family], they need newer accommodation. Some of it is a bit old here.”*  
(Interviewee from Brunei)

*“Yes, language barriers would be a big part for us Asians.”* (Interviewee from Malaysia)

*“I think transportation is a major concern as it is very far away from the town [Perth]. The majority of people would need to rent a car.”*  
(Interviewee from Taiwan)

## Digital experience

Interviewed Asian visitors mention the immature digital experience in ASW to be a barrier for visitation and for higher satisfaction with ASW visits. This complaint includes both the degree of phone coverage and the lack of free high-quality wireless in many places. Moreover, the lack of phone coverage in some ASW areas also causes difficulties in navigation in a destination with a significant self-drive component.

*“We vote our experience seven out of ten. ... We like the scenery and we like the food and everything, but the internet connection ...”* (Interviewee from Korea)

*“We are using Google Maps ... but then in the middle of somewhere you can be lost .... Because the internet is not always, a bit of a weakness.”*  
(Interviewee from Malaysia)

## Food experience

Food is at the same time a main attractor that drives Asian visitors to ASW and a source of dissatisfaction as well. Most Asian visitors state that they love to try Western food, with it being part of the reason they travel to ASW, but they also like to have Asian food options from time to time, at least as a backup. Interviewees complained about limited Asian food options in ASW, as well as a limited variety of food offered, particular at breakfast. Many of the Asian visitors also declared that because they “require” Asian food, they often prepare their own food at the accommodation. This means that cooking options at the accommodation becomes important, and also that grocery shopping becomes a necessary part of the overall tourism experience.

*"Normally I think we have a lot of Western food. Once in a while we also want to go for Asian food. ... But sometimes we find we want something, hot soup or something like that, just Asian. ... We find it quite difficult sometimes I think to find Asian food because we need some hot soup."* (Interviewee from Malaysia)

*"For me, because I travel widely, I am used to ... all the stuff, but for my family, especially my wife, she is not fond of any of that stuff so we have to always make an effort to cook something in the hotel."* (Interviewee from Sri Lanka)

*"So, for me, I like the food... but for them [family], they have been complaining 'I need my rice and Chinese, let's try something Chinese.' So, we have just been cooking at night so they have their food."* (Interviewee from Brunei)

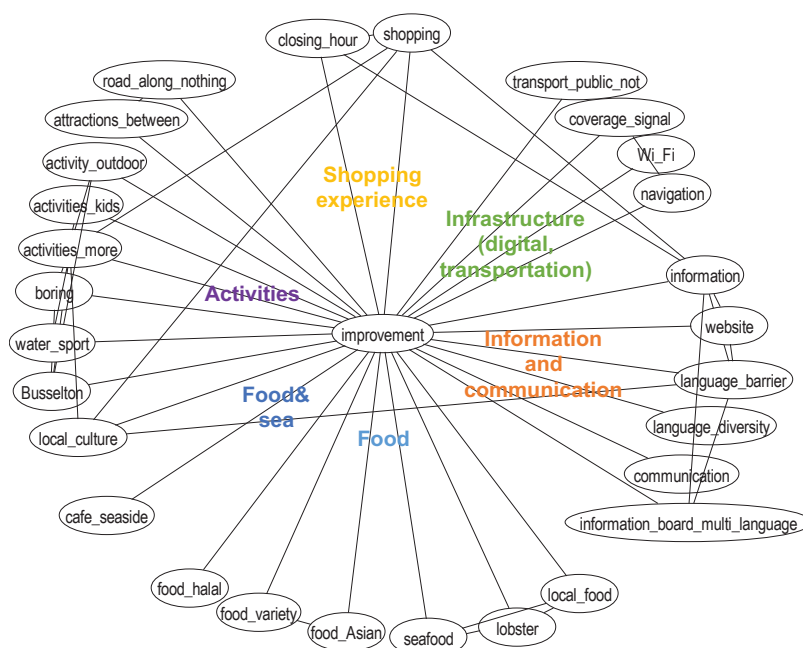
A barrier to visiting is also related to low destination awareness, as argued by some interviewees.

*"I heard about this place via word of mouth, but actually not many people know about this place. Do you know about Perth? When they say 'Perth', what is that, 'Perth'? Then I say down south."* (Interviewee from Singapore).

## Suggested improvements

Figure 26 exhibits Asian visitors' suggestions for making ASW more attractive for Asian visitors, and providing a more satisfying experience.

**Figure 26** Improving the ASW experience for Asian tourists (visitor interviews)



Source: GABEK Association Graph showing main mental associations of interviewees based on visitor interviews in ASW (own data collection, 2018), authors' design with GABEK/WinRelan.



## Shopping experience

Interviewed visitors call for longer opening hours or at least clear information about early closing upfront.

*“Most China people wouldn’t acknowledge the operating hours such as shops closing at 5 pm because in China every shopping centre or restaurant operates until between 10 pm to midnight. I think this could be a problem if people did not acknowledge it.” (Interviewee from China)*

## Infrastructure

In terms of infrastructure, several visitors complained about WiFi and phone coverage. This is crucial because many self-drive visitors use the internet, such as Google Maps, to navigate while travelling the region. Finally, there are some visitors who asked for improved public transport systems, such as a train from Perth to the ASW region.

*“WiFi is bad in this area.” (Interviewee from China)*

*“The WiFi, the internet, the signal needs to be improved, because we are nowadays using it a lot.” (Interviewee from Malaysia)*

*“Internet in and out, in and out, so we have difficulties in using Google Maps. Sometimes, it is really bad signal.” (Interviewee from Korea)*

*“There is limited phone signal here. It is not just a generation thing, but just Korean people always have their phones on them. So, if we are not getting full signal here, that is sort of hard. ... I mean we are used to free WiFi everywhere we go in Korea. Whereas here you have to either pay for it or there is no WiFi.” (Interviewee from Korea)*

## Information and communication

Interviewed visitors argued that in some cases a language barrier exists, which prevents them from fully understanding situations and available offers, and thus prevents them from learning - which is an important factor, particularly for travelling Chinese. Hence, they suggest providing multi-language information on websites and information boards.

*“I would probably recommend the tourist department to consider Chinese language to make it more convenient for us. It would enable us to have the equal opportunity to learn and understand the culture and history as well. For example, having a Chinese written version that describes the history of [an attraction point].” (Interviewee from Taiwan)*

*“We were also facing the challenge to understand the history of certain places that we have visited and learning the local culture, because in Albany specifically, they do not provide any multi-language information on boards.” (Interviewee from China)*

*“As tourists come more, maybe there can be some little bit other languages like instruments like a book, like a little paper like talking about ... the history or the other things... so that people can know who don’t speak English.” (Interviewee from China)*



## Activities

Interviewed visitors call for more activities in ASW to avoid a boring experience. This specifically includes a call for water-based activities, outdoor activities and activities to appreciate local culture. Visitors also would like to see more attractions in between the main townships to make the long drives more easily digestible.

*"It is about putting on more activities." (Interviewee from the Philippines)*

*"I think probably more activities are needed. ... for kids and adults. ... The more you see just seas and sceneries and all those things. .... Just something to do." (Interviewee from the Philippines)*

*"I think they should implement more activities for the tourist. Because apart from sightseeing and swimming there is no other interesting outdoor activities that we can do. Therefore, the time spending her [Busselton] tends to be shorter." (Interviewee from Taiwan)*

*"The only thing I find a little bit is like there is a long drive along there, so that is the only thing, to get from one point to another is really a long drive. ... And then also on the road there is not much. ... Where I am from it is so busy, there are so many towns along the way." (Interviewee from Myanmar)*

## Food and coastal/marine experiences

Visitors argue that on the one hand local food, such as seafood, should be more prominently presented. On the other hand, they would like to see more Asian food options, more variety in food and the option of having Halal food. Finally, some visitors expressed a desire for more seaside café and dining options.

*"I would say the foods [have potential to attract more visitors]. Australia is popular for its fresh seafood, specifically fish and lobster. Therefore, they should probably build more restaurants that serve fresh local seafood." (Interviewee from China)*

*"There should be more variety of foods to accommodate the needs of Asian tourists as I believe not every Asian tourist enjoys and is comfortable with Western food." (Interviewee from China)*

*"For Malaysia, the majority is Muslim, so, more Halal food would be good." (Interviewee from Malaysia)*

*"I think there should be more, perhaps, seaside restaurants. ... Like cafes, that even operate after usually ... after 5 pm, usual standard working hours. This will attract more travellers." (Interviewee from Singapore).*

## Concluding remarks

Interviewed Asian visitors emphasised that their primary motivation to visit ASW is linked to its clean environment, blue skies, beaches, the scenery and the outdoor experience. They explained having such a clean environment strongly differs from what they have at home. The nature-experience in their home countries, be it China, Korea, Japan or somewhere else, may be likely to be disturbed by high population densities, strong human influence and, partially, pollution.

The places visited most often included the Leeuwin Lighthouse, the Busselton Jetty, as well as wineries, the Margaret River Chocolate Factory and some caves in the Margaret River region. In addition, beaches and the Margaret River town centre were mentioned. Asian visitors also repeatedly cited nature-based attraction points in the Great Southern and Southern Forests and Valleys areas, including the Tree Top Walk, Greens Pool in Denmark and The Gap in Albany.

As iconic experiences play a particular role to drive Asian visitation, it is worthwhile closely analyse associations Asian visitors hold with the Leeuwin lighthouse and the Busselton Jetty, two of the most prominent ASW attraction points for Asian visitors. In doing so, it becomes clear that Asian visitors are attracted to their storyline, making the places significant to the visitors themselves and their peers - who also understand the story (be it the longest Jetty, the red train that inspired an animation film, the possibility to have water experiences without getting ones' feet wet or the tallest lighthouse, the place where two oceans meet and whales can be watched). Generally speaking, these attraction points attract Asian visitors because they convey a story that creates a perception that a visit to them provides good value for time and money invested.

The ASW tourism experience consists of a multitude of different experiences, often separated by long distances and delivered by micro-businesses. Jointly, they have a good potential to be an iconic tourism experience. But interviewed visitors urge that they are helped with putting these experiences together and by increasing the number of activities in general, as well as providing more profound and integrated experiences in ASW's areas around food, wine and coastal/marine experiences. In addition, Asian visitors suggest their interest in buying typical products, taking nice photos, and posting these photos immediately online, are taken more strongly into consideration.



# Social

media analysis

## Aim of analysis

To complement the analysis of face-to-face interviews, social media postings originating from Asian profiles and relating to ASW were analysed. Social media postings can provide an efficient way to catch significant amounts of data relating to publicly expressed opinions about a specific issue. However, social media data should usually be triangulated with other data (such as interviews), as it tends to be rather unspecific and is subject to a number of biases, most notably the anticipation of recipients' reactions in the public sphere.

## Data basis

With the help of the Social Studio software, social media postings originating from Asian countries, including Singapore, Malaysia, China with Hong Kong, Taiwan, India, Indonesia, Korea and Thailand, were extracted between April 2017 (06.04.2017) and June 2018 (13.06.2018). A variety of publicly accessible platforms were covered, with Twitter being the most prevalent one. The keywords used to extract postings included names of regions, places, attraction points in the ASW as well as some prominently used hashtagged keywords.

To be able to extract the most meaningful data, automatic and manual cleansing was applied. First, given its interactive and dynamic character, Twitter was chosen for this analysis. Focusing on Twitter enabled the analyst to evaluate posts both originating first-hand from Asian users themselves (herein referred to as 'individual tweets') as well as posts being shared by Asian users on a broader scale through retweeted content (referred to as 'individual retweets'). Secondly, only content in English was considered. We have also included business and industry content shared by an array of travel-related institutions based in Asian countries.

The final dataset selected for the purpose of this study consisted of 80 posts, that were filtered down via hashtags relevant to the study area, ASW. These include references to the towns of the region, as well as popular attractions such as the Busselton Jetty and The Gap, restaurants and wineries, and widely used hashtags such as #seeAustralia and #justanotherdayinWA. We opted for having a relatively smaller but more concise and clearly pertinent dataset in order to get an accurate glimpse on what people are sharing regarding tourism-related experiences in ASW. By using the hashtag, it is likely that people in relatively younger age groups and people having a decent knowledge about or involvement with ASW are over-represented. Consequently, the findings derived from the social media analysis should be treated with some caution.

## Results

Results of the social media analysis are presented in the form of word clouds that give a more quantitatively inspired overview over some prominent topics, and GABEK association graphs to show posters' main associations in a qualitative manner.

### A quantitative assessment with word clouds

*"Bye #MargaretRiver and #WesternAustralia. We had a great time. From all the great restaurants and wineries to the Busselton Jetty and to the edge of Margaret River where it almost reaches the #IndianOcean to the old #Bedford truck that took us on the #Kangaroo safari. We saw and did so much. It was a surprise. Never thought that #WA had so much fun in it. (may have had something to do with the beverages) Anyway, lots of thanks to our wonderful tour guide Neal McCleod of #McCleodTours Till we meet again. #Holidays #Australia"*

- Quote from a Malaysian visitor posted on Twitter about holidays in WA

**Figure 27** Keywords about ASW shared by Asian accounts on Twitter (in general)



Source: Word cloud showing the frequency of words shared on Twitter by Asian users regarding the ASW region (Social Studio data collection, 2018), authors' design on online cloud generator. The size of the words represents the frequency of mentioning.

Figure 27 was generated using Asia-based Twitter users' personal tweets and retweets about ASW. The content shared on these posts was found to have a largely positive connotation, as shown by the choice of adjectives like "beautiful," "happy," "great," "worth [it]," "favourite," "lovely," "epic," "wonderful" and "delicious". The most popular word shared in the analysed social media posts was "Margaret River". It was often used referring to the region as a whole, rather than solely the town of Margaret River, as also denoted by the high frequency of the word "region". Other towns frequently mentioned include "Albany" and "Bunbury," and to a slightly smaller



extent, “Busselton,” “Augusta,” “Cowaramup,” “Yallingup” and “Dunsborough”. Popular places and attraction points named include the Tree Top Walk and Elephant Rocks in Denmark, and The Gap and Natural Bridge in Albany, Boranup Forest out of Margaret River, the Bibbulmun track that runs across ASW, Hamelin Bay and Cape Naturaliste.

Accommodation was also a frequently discussed topic on social media, as shown by the large size of words like “hotels,” “holiday suites” and “homes”. They were generally shared as promotional and advertisement material, with a focus on reduced prices and cheap rates.

From the cloud in Figure 27, two major motivations underlining users’ posts can be traced: nature experiences and culinary experiences. Nature experiences are commonly referred to by mentioning the scenery encountered in ASW. The content shared on social media often highlights the colours of the region’s “sun-soaked” beaches, the change of seasons, especially when it comes to Autumn, sunsets, the wide-open landscape views, pristine environment and unusual rock formations and caves, such as the Jewel Cave close to Augusta. Although nature gazing and sight-seeing represent prevalent activities visitors report on or are interested in outdoor activities such as fishing, whale-watching, hiking on nature trails like the Cape to Cape or Bibbulmun tracks, and even watching the Margaret River Pro surf competition are all considered to be important when it comes to entertainment. For instance, a Kangaroo Safari was mentioned as a means by which to tap into these factors, showing a certain demand for hands-on activity-dense tour products. This may highlight an interest of younger generations in taking part in adventurous and activity-based tourism activities in ASW.

As for culinary experiences, eating and drinking at restaurants, wineries and breweries were deemed to be a significant motivator to visit the region, and furthermore, as a way to explore the region. Many of the social media users here-included are self-entitled ‘foodies’, being strongly motivated to visit new places based on food and wine offers. Sought after flavours include local fresh seafood and beef (steak), Western foods, such as burgers and ice cream, as well as the occasional Asian-abroad cuisine experience. Additionally, users enjoyed sampling both red and white wines, as well as beers. Wine shows to be a popular purchase to take home, especially within the Singaporean market, with one post showing a young family on holiday in ASW returning home with 24 different Margaret River wines.

In both scenarios, photography plays an important role in communicating experiences to friends and family, and serves as a vehicle with which to document the travel itinerary. Social media posts reveal that users enjoy taking photos of interesting meals and beverages, as well as extraordinary and unique views and landscapes in ASW.

In the following, we compare the frequency of words used in original tweets with those used in retweets. Through this comparison it is possible to illustrate what Asian tourists have chosen to share about their holidays in ASW themselves, as opposed to retweets possibly indicating what subject matters Asian users are interested in, not necessarily having visited ASW themselves.



**Figure 28** Tweets about ASW shared by Asian accounts on Twitter (retweets excluded)



Source: Word cloud showing the frequency of words shared on Twitter by Asian users regarding the ASW region (Social Studio data collection, 2018), authors' design on online cloud generator. The size of the words represents the frequency of mentioning.

Figure 28 shows words chosen by Asian tourists themselves mostly to showcase the places they went and activities they took part in during their time in ASW. Again, the prominence of Margaret River, Bunbury and Albany in this dataset is demonstrated by the relatively large size of these words. Similar to the first cloud, there is a strong focus on outdoor and nature-based activities and experiences, as well as a strong presence of culinary experiences, including both wineries and breweries. It is interesting to observe the case of the hashtag #6exyinperth, created and used by a small group of Asian tourists during winter 2017. Dozens of posts were shared using this hashtag to indicate their holidays in Perth and beyond, many of which included visits to ASW.

**Figure 29** Retweets about ASW shared by Asian accounts on Twitter (tweets excluded)



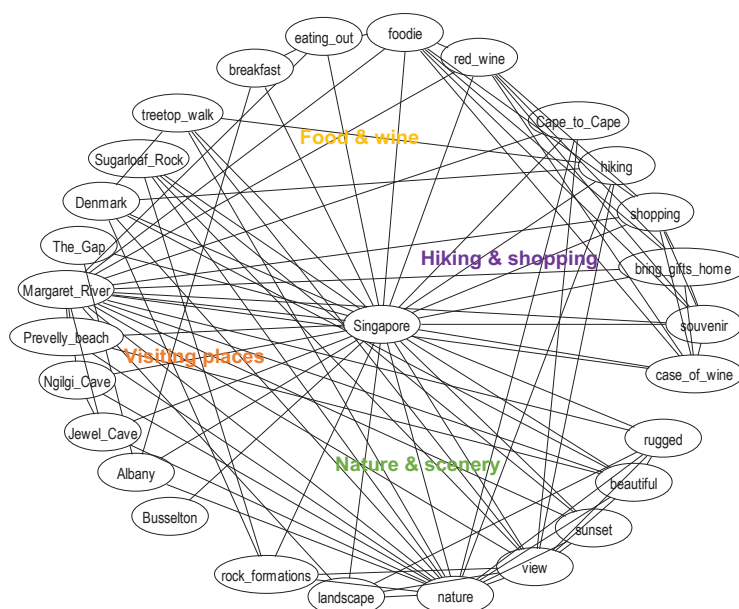
Source: Word cloud showing the frequency of words shared on Twitter by Asian users regarding the ASW region (Social Studio data collection, 2018), authors' design on online cloud generator. The size of the words represents the frequency of mentioning.

Figure 29 displays the most frequently stated words found on ASW content retweeted by Asian accounts. The great majority of the content shared in this category is originally created and posted by renowned travel organisations in the region and country, such as @MargaretRiver, run by Your Margaret River Region (MRBTA), @WestAustralia run by Tourism WA, and @Australia, run by Tourism Australia. Here we appreciate that Asian users are again drawn to the beautiful and unique scenery, native wildlife and vegetation found in ASW. The role of hashtags is made more evident, with the popularity of #justanotherdayinWA, #AustraliasSW, #seeaustralia and #thisisWA. In this category, there is a higher frequency of news-related posts, the predominant topic being the Margaret River Pro surf competition with links to words like Drug Aware, Kelly Slater and North Point.

## A qualitative assessment with GABEK Association Graphs

We analysed and coded the content of Asian users' posts about ASW with the help of GABEK and generated GABEK Association Graphs. The figures below display such graphs, which are networks of keywords (mind maps) that represent the content of posts, and thus display the main associations of Asian Twitter users with ASW. The content is presented according to the country of origin of the post (account), covering the four most active countries in creating and sharing content on ASW: Singapore, Malaysia, China and Indonesia, respectively.

**Figure 30** Topics about ASW shared by Singaporean users on Twitter

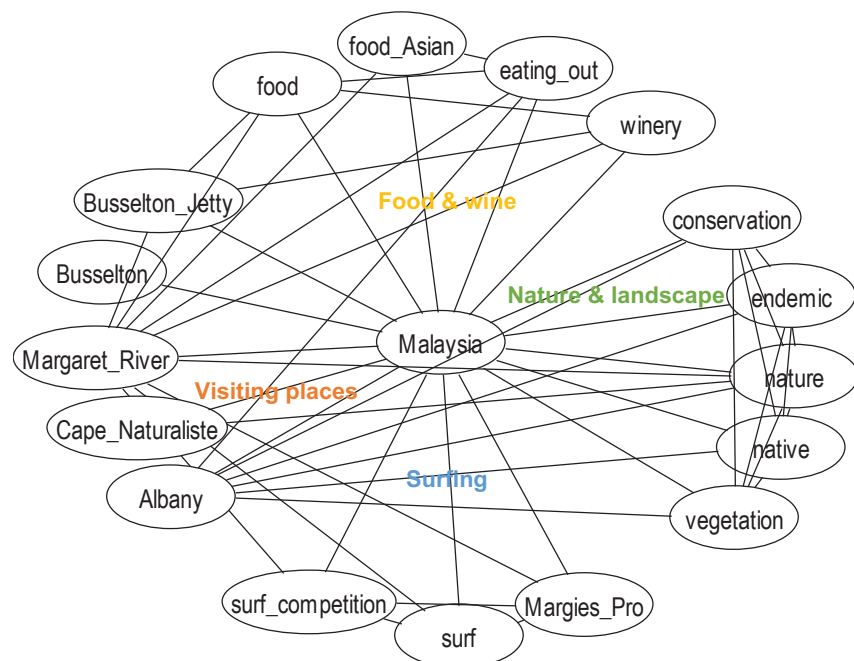


Source: GABEK Association Graph showing main associations in content about ASW shared by Singaporean Twitter users (own data collection, 2018), authors' design with GABEK/WinRelan.

In this social media analysis, Singapore was the most active country amidst the target group regarding content shared about ASW. This is illustrated by the numerous keywords displayed in Figure 30. Keywords, and thus content, can be categorised into four distinctive groups: places, food & wine, hiking and shopping, and nature and scenery. The keywords demonstrate that there is an avid interest in visiting

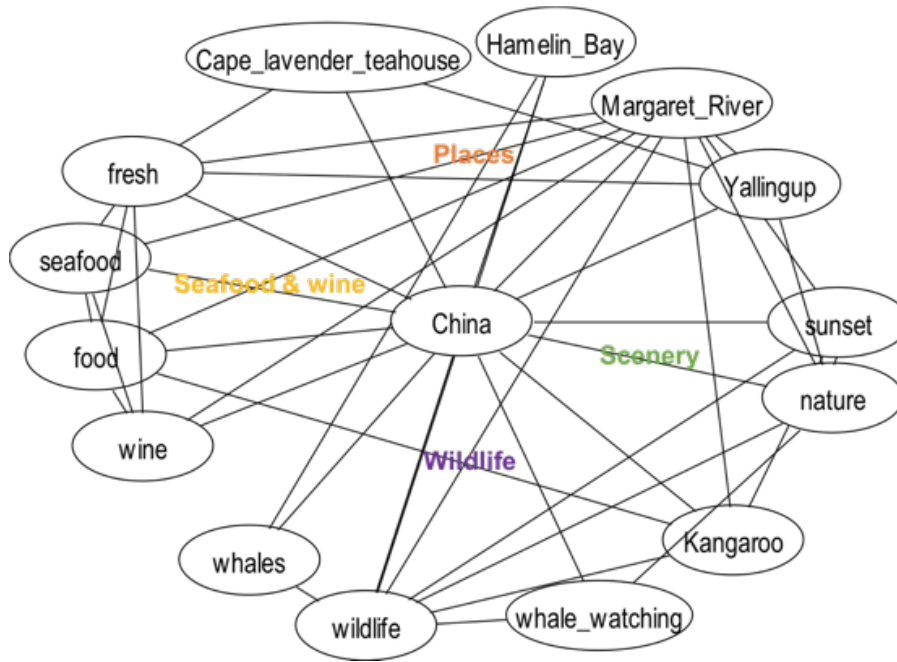
attractions, such as the Tree Top Walk, The Gap and the Jewel Cave, all of which are linked to experiencing nature and scenery. Features such as rock formations (Sugarloaf Rock), coastal towns like Margaret River and Denmark, landscapes, and sunsets have a prominent place as well. Additional activities highlighted on behalf of this market include hiking trails, such as the Cape-to-Cape walk, and shopping for souvenirs and gifts to return with. Moreover, food and wine capture a significant part of Singaporean attention, emphasised by the content shared on eating out and wine tasting. Overall, the Singaporean market presents itself on Twitter as a relatively mature and curious market, willing to explore an array of activities, including going outdoors and off the beaten track.

**Figure 31** Topics about ASW shared by Malaysian users on Twitter



Source: GABEK Association Graph showing main associations in content about ASW shared by Malaysian Twitter users (own data collection, 2018), authors' design with GABEK/WinRelan.

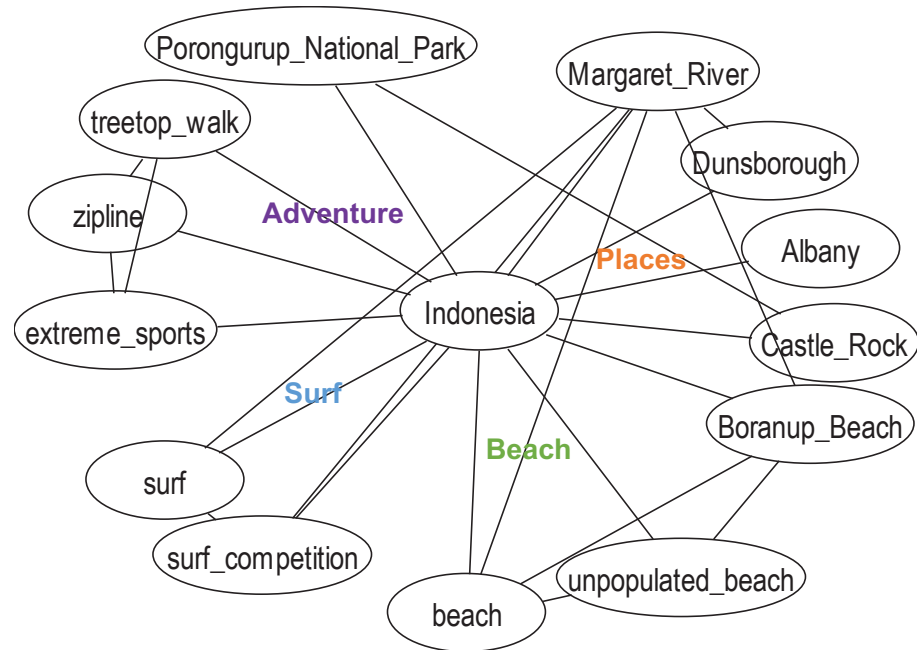
Similar topic categories have been traced for ASW-related content shared in Malaysia, however with less focus on hiking and a greater focus on surf and surf competitions (Figure 31). Linked to nature and landscape was a strong thread of interest in the native and endemic species found in ASW, as well as environmental conservation. Commonly discussed places include the Busselton Jetty, Margaret River, Cape Naturaliste and Albany. Again, food and wine is another key topic discussed on social media by Malaysian users, however, with an interest in not only trying local food, but also having a taste of home by dining at Asian restaurants.

**Figure 32** Topics about ASW shared by Chinese users on Twitter

Source: GABEK Association Graph showing main associations in content about ASW shared by Malaysian Twitter users (own data collection, 2018), authors' design with GABEK/WinRelan.

As for the Chinese market analysed here, there is a noticeable difference in terms of trending topics, with a focus on specific places and scenery, and a significant appetite for wildlife experiences, including whale-watching (Figure 32). Chinese posts also convey a keen interest in fresh seafood. Worthy of mention is the reported Cape Lavender Teahouse in Yallingup, which attracts visitors due to a diverse range of hand-made products using lavender grown onsite, including cakes, scones and ice creams, as well as honey and skin care products. Lavender is considered to be a romantic reference for Chinese people, and tea is culturally accessible for them as well. Therefore, the Cape Lavender Teahouse has possibly been more commonly mentioned as a place to visit due to these cultural links.

**Figure 33** Topics about ASW shared by Indonesian users on Twitter



Source: GABEK Association Graph showing main associations in content about ASW shared by Indonesian Twitter users (own data collection, 2018), authors' design with GABEK/Winkelman.

Lastly, among Indonesian Twitter users posting about ASW, there is a noticeable interest in topics revolving around adventure, surf and beach, slightly different and more pronounced than in the previously discussed markets (Figure 34). Indonesian users do not dedicate a lot of discussion to the more well known attractions, with a larger focus on unpopulated areas, such as Boranup Beach and Castle Rock. This market seems to show an above average interest in active tourism, such as zip-lining, extreme sports, treetop walking and surfing.

Both, through the use of word clouds and association graphs we posit that the most commented topics on Twitter by Asian users regarding ASW relate to nature experiences and culinary experiences, as the great majority of activities and places mentioned orbit around elements pertaining to either of these two core motivators. This is in line with the results found through the interviews, and serves as additional support to show what Asian visitors are attracted to in ASW.





# Good

practices

## Aim of analysis

This chapter presents a number of good practice examples relating to adapting products for Asian visitors, or creating new products for this specific market, to inspire solutions and underscore how product development and adaptation for Asian visitors is doable and can contribute to success in attracting these markets.



## Results

This chapter presents six good practices of tourism providers, or attraction points, that have contributed to increasing the attractiveness for Asian visitors in other regions, including the Museum of Old and New Art (MONA) in Tasmania, the Lobster Shack on the Coral Coast in WA, the Caversham Wildlife Park in Perth, the Fremantle Markets in Fremantle, the Pink Lake (Hutt Lagoon) and Geraldton Air Charter in Gregory, WA, as well as the Sandalford Winery.

## Museum Of Old and New Art (MONA) in Tasmania

*"Down south you've got everything, so the future it very strong. What I think the southwest needs, it's got the Anzac Centre which I think is a great centre, but the Asians really couldn't care about that, there needs to be something that is a massive hook for the Asian market in the Margaret River Region. And I know everybody uses this for Tasmania but you've got the MONA Museum that puts Tasmania on the map. That's what we need down South, you've got the Anzac Centre which is a sensational attraction, I think it's one of the best things we have, but it only appeals to a specific market, ... which is not Asia." (Interviewee)*

At first glance, it is seemingly impossible to depict how Hobart's Museum of Old and New Art (MONA) has been able to change tourism in Tasmania. However, concealed within three subterranean floors that resemble a labyrinth before it opens into a gallery, lies Australia's largest privately funded museum: an awe-inspiring collection of antiquities and arguably some of the world's most thought-provoking pieces of contemporary art. But, besides its conspicuous architecture and sensory instigation, what is it about MONA that attracts nearly one third of Tasmania's overall visitors? Second only to Salamanca Markets, MONA continuously rates at the most visited attraction in Tasmania, attracting waves of both interstate and international tourists even through the depth of winter through its "Dark Mofo Winter Festival".

One of the most innovative stances MONA has taken is to replace the use of standard wall labels for "The O," an electronic audio device designed to guide the visitor through the museum by offering details on the artist and work, be it through essays or interviews with the artist, or musings on the artwork narrated by David Walsh himself, the owner of MONA. The idea underlining "The O" is to enable the guest to rate the artwork themselves, allowing them to reach their own conclusions.

Nevertheless, Leigh Carmichael, the Creative Director of the museum, reveals to begin with the museum was not conceived as a tourist icon. According to Elizabeth Pearce, the museum's Senior Writer, the secret of the undeniable success with the audience is that they don't care too much about the audience, in the sense that they never set out to target an audience in particular. Instead, the strategy employed from the start was to build a sense of ownership and authenticity MONA-wide, to build confidence in the value of the product itself rather than shape it around a projected image of what is thought to be what the audience wants.

Through this paradigm MONA not only continues to attract thousands of tourists yearly, but also leverages and exposes other products in the region, such as the strong food and wine culture already prevalent in the area, or wilderness experiences for which Tasmania is renowned. Furthermore, it has prompted a new range of adventurous cultural and food experiences throughout Hobart and Tasmania as a whole, which in turn has prolonged tourists' length of stay and extended the local season within the island state.

## Lobster Shack (Coral Coast, WA)

*"There needs to be something that will really hook in the Asian market, and an example of this is the Lobster Shack in the Coral Coast, they need something like that in the southern region that becomes a must-do, have-to-visit-no-matter-what-you-do. And whether that's around fishing or whale-watching, or apple picking, I'm not sure, but that's what they need." (Interviewee)*

Less than 20km from the Pinnacles National Park, the Lobster Shack has made its way to the bucket list of those exploring WA's Coral Coast, sparking a special interest in those travelling from Asia, which makes up about 80 per cent of the total number of visitors to the premises. This may be due to the beachfront factory's offer of the ultimate seaside experience, all within two driving hours from Perth.

The factory tour provides the visitor with a direct glimpse into the multi-million-dollar lobster industry, starting with a boat demonstration on how the Western Rock Lobster is caught and taken to shore. Next, a stroll on the factory's overhead walkway allows guests to trace the lobster's route through the processing plant before it journeys on across the world. Among languages available on the tour's audio guide are Chinese, Japanese, Korean and Indonesian, which allows guests from multiple nationalities to make the most of the experience and move along their own pace.

Perceiving visitor's increasing interest in hands-on experiences, the Lobster Shack also runs regular fishing charters, sea lion watching expeditions, and lobster pot pulling tours. Another major appeal for those with an appetite for seafood is that visitors are welcome to have their own catch of the day cooked at the Shack's restaurant into lobster-infused meals.

Considering the motivation for Asian tourists to experience fresh local ingredients, the Lobster Shack has orchestrated a range of products that appeal largely to this market's travel ambitions. Among other initiatives, the factory has taken on that target the Asian market is the choice of Asian foods, such as fried rice and laksa, alongside local seafood, the availability of a Chinese webpage version, China Ready accreditation, and payments accepted with UnionPay cards.

## Caversham Wildlife Park (Perth, WA)

*"Caversham Wildlife Park does at least, I would say, 60 to 70 per cent or maybe 80 per cent of all the actual tourist and business visitors from China. He has no China-ready accreditation because he knows more about China than anyone who is trying to teach about China-ready. And all he has done is cater for them at being really good at what he does, which is a wildlife park." (Interviewee, provider)*

Caversham Wildlife Park located just 30 minutes from Perth is home to over 2,000 animals, making it the largest privately owned native wildlife collection in Western Australia. The park prides itself in being a world-attraction whilst keeping a laid-back Aussie atmosphere, and offers unique and interactive experiences with Australian wildlife to visitors worldwide.

The park is said to attract up to 80 per cent of all Asian visitors to the area, and David Thorne, founder and owner, states that this market has swelled numbers in his operation. The park is said to attract visitors from various Asian countries due to the owner's personal understanding of the culture and clientele, with a focus on photo making, digital accessibility (sharing of photos in real-time) and visual, tactile and activity-based experiences.

Among interactive activities are the farm shows, with a chance to experience the 'true blue Aussie farm life' by milking a cow, watching sheep shearing, bottle feeding a lamb and watching dogs mustering sheep – all of which constitute unique experiences to those from urban centres across Asia. Additionally, guests are encouraged to meet and feed iconic Australian animals, including wombats, kangaroos and koalas, all the while taking as many photos as they like.

One of the biggest components that sets the park aside from other nature-based experiences in the region is that free WiFi is made readily available to all guests throughout the park. Not only does this help overseas travellers access language translation apps, but it guarantees that they can automatically upload and share photos online, an activity held in high regard by the Asian market. Despite the expense that this offer entails, it also provides the park with cost-effective promotions via word-of-mouth. Caversham Wildlife Park also has an app with detailed information on the park, as well as its animals, further aiding its guests in their overall experience.

## Fremantle Markets (Fremantle, WA)

*"The Asian people ... they like to bargain, [and in ASW] the providers say no. So sometimes this behaviour puts you off. Many people come ask me about the Fremantle Market and if they can bargain there. And I say, by all means. Fremantle Market itself is a very good example, everybody is so used to bargaining they say 'Ok, take it, 3 for 5 dollars', and can you see the change? It's because ... people are so used to that culture, that people bargain that they say 'Ok, we give you [better deal]'" (Interviewee)*

The Fremantle Markets have been successfully running for over 100 years and continue to draw both locals and tourists alike to their lively atmosphere. Combining cultural heritage, a shopper's paradise, authentic international street food and live music and street performances, the markets have seen over 2.6 million people through its gates in 2017. It is no surprise that Asian tourists are among the most prevalent international visitors to include the historic market on their must-see list while visiting WA.

Shopping plays an important part in many Asian travellers' visits overseas, and within the grounds of the markets guests can easily access over 150 stalls with displays ranging from typical Aussie souvenirs, to honey products, fresh fruits and vegetables, indigenous arts and crafts and health and well-being products. Additionally, many stalls feature local artists and showcase the region's local produce, while Fremantle's multicultural character is shared through diversified dining options.

Besides the variety the Fremantle Markets, perhaps what Asian tourists find most appealing is the feeling of being accounted for. Accustomed to the high influx of international visitors, the market's stallholders tend to share an element of cultural awareness. Bargaining and seeking out great deals is understood to be intrinsic to the Asian culture, and a request, when coldly turned down, can be read as disrespectful. That said, most market stallholders are prepared to offer good deals and are not shy to rebait a request to bargain from their fellow Asian customers, ensuring their buyers are content whilst guaranteeing a good sale.

### Pink Lake (Hutt Lagoon) and Geraldton Air Charter (Gregory, WA)

*"The things that are taking around the whole of Australia that we are finding a demand for are things such as the pink lakes in the north near Geraldton and another down in Esperance. It's finding an experience where really your counterparts back home haven't experienced. Definitely the breaking line is going places their friends haven't been. It's just finding that niche where it's not too far and not too long where people don't spend all their time travelling." (Interviewee)*

What many Western Australians might never have heard of, let alone experienced, has over the past four years become a status symbol for many Chinese tourists wanting to experience something exclusive. WA's so-called Pink Lakes feature their naturally bubble-gum pink hue from the proliferation of several salt-loving bacteria, thus instating a picture-perfect scenario that has quickly become a social media craze in China and other Asian countries. The closest Pink Lake to Perth is at Hutt Lagoon, located north of Geraldton and a short drive from Kalbarri National Park.

Behind this growing trend is also Wendy Mann, Chief Pilot and Managing Director of Geraldton Air Charter, who in 2014 hired a Chinese employee to market the region's natural resources on Chinese social media platforms such as WeChat and Weibo. The business, which was one of the first to complete the China Ready Accreditation Program, leapt from flying 16 Chinese tourists in one year to just over 500 in three weeks during the Chinese Mid-Autumn Festival. The Geraldton Air Charter now employs four pilots originally from China, ensuring Mandarin and Cantonese-speaking guests make the most of their experience. On the business' webpage it is hard to overlook the link to the Chinese version of the website.

Reasons the Chinese market now accounts for more than half of the passengers on the businesses' charter flights is, according to marketing manager Jacinta Shen, both the uniqueness of the experience and the symbolism of the colour, which represents youth and romance. Furthermore, Han Jie, Progress Midwest economic development officer, comments that Chinese tourists prize things that are not easily available to their acquaintances in their homeland, for instance, the pristine environment, fascinating sunsets, starry night skies and the view of the horizon. As such, having been to the Pink Lake allows the tourist to then boast about a once-in-a-lifetime experience on social media with family and friends. This boost in tourism has undoubtedly benefited the regional economy as a whole, as tourists travelling

to the Pink Lake are also interested in partaking in other experiences, such as a visit to Kalbarri National Park or the Abrolhos Island, and exploring local seafood offers, including going fishing or indulging in a fresh lobster dish.

### Sandalford Wines (Swan Valley, WA)

*“The best Asian-sensitive products are usually the ones that have Chinese workers, not necessarily from China ... it is understanding the culture. Take the winery for example in the Swan Valley, Sandalford [...], we give all our business to these guys because at Sandalford there is Jesse Chiang, she is from China and we know that every time we put a group there it will be taken care of, because she is from China and she sees a Chinese group and thinks they are a group from her own country and she will want to make them feel welcome and so they will speak in their own language, and she will ask them where they are from, and she will know that place, and she can tell them about her experience at the winery and how it works and it makes the experience a lot more refined.”*  
(Interviewee)

Both wine exporters and winemakers have been noticing an increase in Chinese visitors' knowledge and appreciation of Australian wines. This, in part, is due to the value of the Australia dollar, but undeniably also reflects the growing awareness of Australia's diverse wine regions among this Asian market. With a distinct preference for red wines, visitors seeking out cellar doors are now boosting tourism in rural areas.

Swan Valley-based Sandalford Wines is next to some Asia- and China-aware wineries in the Margaret River region, including Leeuwin Estate, Vasse Felix or Voyager Estate. Set amongst these exemplary wineries, who have been working towards tailoring their products to the expectation of Chinese consumers, Sandalford, won Gold at the Australian Tourism Awards for being best in the category of Wineries, Distilleries and Breweries. Grant Brinklow, CEO of Sandalford, acknowledges the triumph as a milestone for the business given the high competition in the world-class industry, and attributes the success partly to the company's 'China-ready' approach.

Back in 2014, Sandalford Wines was the first WA winery to become China-ready and accredited. Grant claims that WA has an advantage over the eastern states due to the shorter travel distances, stating this proximity makes catering to Chinese tourists a relevant task for the state. Just this year the cellar door was decorated for the Chinese Lunar New Year and sales figures confirm that the winery's Chinese business is at its best thus far. The 32,000 Chinese-speaking tourists who visit the winery each year find menu options translated into Mandarin, as well as seven staff members fluent in Mandarin, who guide the guests through flavours and smells in a way that is more familiar to their culture. Jessie Jiang, cellar door manager, explains that the Gold award will hold a special significance for their Chinese customers, as Chinese travellers value and seek out experiences that are deemed to be the very best. The award will not only benefit the winery alone, but the region as a whole, as it helps to raise the Swan Valley to a world-class tourism destination.





# Key

recommendations

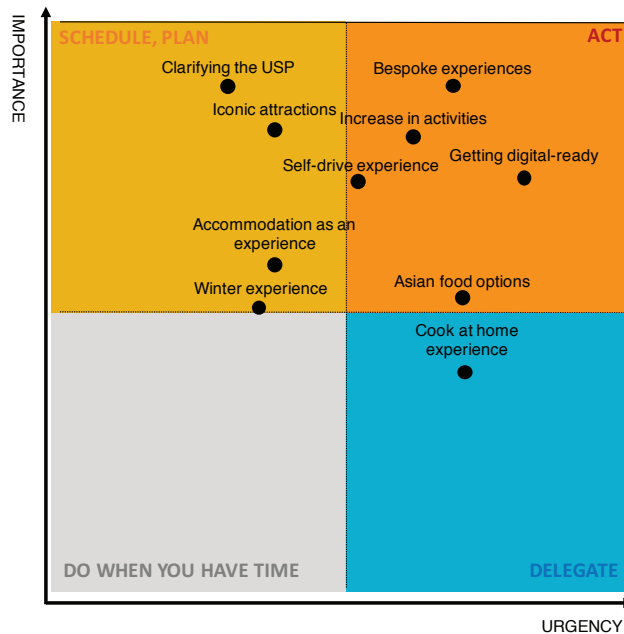


## Key recommendations

Many interviewees agreed that destination awareness about ASW is low in most Asian markets. Thus, there is undeniable room for increased efforts in marketing. However, it has also become clear that investments into marketing and cultural awareness can only yield high returns if they are accompanied, and in fact preceded by, product development and adaptation recommendations. Many Asian markets are characterised by word-of-mouth dynamics and a strong social media influence. Hence, good products and offers will make a difference in generating recommendations and co-marketing efforts of consumer on social media. Social media crazes can be curated, but again employing key opinion leaders and unleashing the virtuous cycle of iconisation will be much more effective if they are supported by strong underlying products.

In other words, marketing is of paramount importance, but it is no substitute for both networked and individual product development and product adaptation. It is also not a substitute for ensuring that a region such as ASW embarks on tourism development. This includes being authentic and maintaining strong support by local residents, as welcoming locals are becoming scarcer and are a precious asset in an ever-increasing worldwide tourism industry, which in some places is growing beyond its sustainable limits.

In the following, the research study's findings are condensed into operationalisable suggestions for product adaptation and development (see Figure 34). This translation is done by following the above principles, and by considering an integrated product development cycle that strives to base tangible products while offering a region's core competencies and key values. It is necessary to develop tourism products at the interface between regional and supply side characteristics and market needs. However, in the long term, to support the unique positioning of a region, specific products, even if adapted to the needs of a specific market segment, should never weaken or even lose their link to the regional core competencies. If the link is maintained, a strong, coherent and unique regional story will emerge, which is a good basis for addressing different and changing markets.

**Figure 34** Importance-urgency-matrix of product development and product adaptation recommendations

- **Recommendation 1:** Clarifying the USP – Defining and communicating a clear USP: *“The cleanest and most diverse environment you can possibly get”*

Value-sensitive, and peer judgement-sensitive Asian visitors, even more than other visitors, would like to have a clear and easily comprehensible answer as to why they should visit a specific region. This is all the more true for ASW as, if viewed from the home of an Asian visitor, it is not necessarily the most easily reachable destination and alternative options are manifold. Giving a clear reason to visit assist in motivating Asian visitors in Perth to visit ASW.

According to interviewees on both sides of the market, against the background of the everyday life context of Asian visitors, the strongest reason to visit ASW is having a nature-experience in an incredibly unspoiled and diverse environment with relatively sparse human population, which manifests itself in blue skies, clear oceans and excellent local produce. Therefore, based on the findings of this report, the straightforward answer to the question ‘why visit ASW?’ is ‘to experience the cleanest and most diverse environment you can possibly get’. Considering in many Asian countries such a nature experience has become increasingly scarce, with more and more places suffering from environmental problems, and with more and more people not being able to see the sky on a regular basis, positioning ASW as one of the healthiest and best preserved spots in the world should exert a strong appeal. Moreover, with an increasing number of European and Asian destinations struggling with over-tourism phenomena, the competitive advantage of ASW in this regard is likely to grow.

Needless to say it is necessary to provide clear and trustworthy evidence underscoring the above claims, and supporting the cleanliness of the region and to evidence health benefits (data could be exhibited at smart benches as per below). Similarly, it is important that specific activities and attraction points are designed to allow visitors to experience this USP. Developed activities should enable visitors to take part in this healthy and unpolluted natural context by offering accessible vantage points to gaze at the natural scenery, to be active in the natural environment, to enjoy food and wine, as well as other beverages directly from where they are produced, and to participate in nature based health and wellness offerings.

The ‘therapeutic landscape’ concept refers to landscapes promoting physical, mental, and spiritual wellbeing. This aligns with the Kneipp philosophy, which combines hydrotherapy with exercise, physiotherapy, and appropriate nutrition to reinstate a balanced, healthy lifestyle, and provides an interesting framework to develop products and services. In addition, the focus on the natural environment could also be linked to Aboriginal customs and knowledge (bush tucker / bush medicine), as the first Australians are still very much rooted and connected to ancestral land.

#### Recommendation: Clarifying the USP

WHAT	HOW
Defining and communicating a clear regional core competence and USP.	<ul style="list-style-type: none"> <li>Based on the interviews, the key facets of ASW's regional core competence for Asian people should very clearly embrace the idea of having a nature-experience in an incredibly unspoiled and diverse environment with relatively sparse human population <ul style="list-style-type: none"> <li>This should be aligned with current destination strategies.</li> </ul> </li> <li>Align communication strategies with the regional core competence</li> </ul>
WHY	<ul style="list-style-type: none"> <li>Underlie the claim, which is at the heart of the core competence, with clear and trustworthy evidence and show this evidence to visitors (e.g. evidence on cleanliness of the air, high number of endemic species etc)</li> <li>Align product development initiatives with the regional core competence: specific activities and attraction points need to be designed in a manner to allow to <i>experience</i> the defined core competence</li> <li>This may mean: <ul style="list-style-type: none"> <li>Offer accessible vantage points to gaze at the natural scenery</li> <li>Enable visitors to be active in the natural environment (hiking and biking paths, water sports crash courses etc.)</li> <li>Enable visitors to enjoy food and wine as well as other beverages directly from where it is produced (tastings, direct sales, food markets)</li> <li>Enable visitors to participate in nature-based health and wellness offerings</li> </ul> </li> </ul>

- Recommendation 2: Bespoke experiences – Developing a modular system of experience-based itineraries and experience packages.

Interviewees repeatedly mentioned perceived distances within the region, as well as empty spaces between attractions as a key barrier for further improving the Asian visitor experience in ASW. According to the research study's findings there is a need to support Asian visitors to better grasps the logics of the ASW region in terms of experiences, and to make very clear how the region can be explored best. In contrast to intrastate visitors, many Asian visitors do not have a well-established understanding about how the region is best explored, and how the

geographically dispersed activities can be connected to ensure best value for invested time and money. Therefore, the findings of this report suggest developing a modular system of experience-based itineraries and experience packages that are bespoke to a range of different interests (e.g. wine & food, different degrees of adventure, activity-based interests such as biking or golfing). These may help Asian visitors to connect various spots and experiences that ASW has to offer in each area of interest, but are sometimes geographically apart. This includes providing some of the possible experiences as guided components, which can be easily added to a FIT trip. In any case, it means going beyond a 'catch-everything' map towards more specific and targeted modules and itineraries. This proposed initiative is about offering pre-selected packages and itineraries, underpinned by choices and storylines, which are inextricably related. Hire car companies need to be considered as important partners in the distribution of packages and information.

Proposed examples include:

- o *Graded, guided adventure packages:* From soft adventure (e.g. hiking a part of the Cape-to Cape walk and other walks in the forests and hills/mountains of ASW, including the Porongurups and Stirling Ranges) through to medium adventure (e.g. stand-up paddle lessons) and strong adventure (e.g. cave adventure tour, survival tour in the forests);
- o *Food and wine itineraries,* presented as menus, and put together by famous chefs enacting an underlying story – see also the suggestion from Galbreath et al. (2016) that Chinese are increasingly interested in pairing wine and food;
- o *Shopping itineraries;*
- o *Photographic itineraries:* Grouping the best photographic spots into an itinerary; it is also useful to support visitors by indicating the best spots to take photos and selfies with installations such as small platforms, creatively designed signs or telescopes;
- o *Biking itineraries* - this is an interesting special interest market, but obviously, requires specific interest marketing and product development targeted at this group;
- o *Authentic event packages.*

## Recommendation: Bespoke experiences

WHAT	HOW
Developing a modular and bespoke system of experience-based itineraries and experience packages.	<b>Product development:</b> <ul style="list-style-type: none"> <li>Creating a continuum of adventure packages, from soft to intensive, for FITs</li> <li>Developing specific (!) food &amp; wine itineraries each linked to a storyline and marketed with celebrities (chefs)</li> <li>Developing photographic itineraries for FITs</li> <li>Indicating best selfie/photo-spots (but do it creatively)</li> <li>Developing additional biking itineraries to explore the region by bike, linked with specific product development and marketing</li> <li>Developing authentic shopping tours with a local guide, authentic cooking classes with local cooks</li> <li>Developing authentic events linked to the core competences of the region to trigger visitation from short haul markets</li> </ul>
Many Asian visitors do not have a well-established understanding about how the region can be explored best and how the geographically dispersed activities can be connected to ensure obtaining the best value for the invested time and money.	<b>Distribution:</b> <ul style="list-style-type: none"> <li>Collaborating with hire car providers in Perth for distribution</li> <li>Collaborating with accommodation providers and visitor centres for distribution</li> <li>Dynamic packaging opportunities for accommodation providers and others</li> <li>Products should work both as completely self-guided and as guided/bookable variants (consider platforms which allow for booking 'experiences')</li> </ul>
	<b>Communication:</b> <ul style="list-style-type: none"> <li>Link each product to a storyline and celebrity (Asian market)</li> <li>Special interest development such as biking needs to be linked to special interest media and platforms</li> </ul>

- Recommendation 3: Iconic attractions – Boosting awareness, visibility and attractiveness by increasing the number of iconic attractions.

Lack of destination awareness and visibility are major barriers for Asian visitors to visiting ASW. Iconic attraction points are an undeniably effective way of increasing visibility of destinations in an Asian tourism context. In a typical translation chain, more iconic attraction points give a visit more relevance, easily translating into higher derived prestige. Therefore, based on the findings of this report we hold that ASW already has attraction points that are be defined as relatively iconic, including the Leeuwin Lighthouse and the Busselton Jetty. To further increase the attractiveness to Asian visitors it would be helpful to increase the iconic status of ASW's attraction points. For the Busselton Jetty, this may mean promoting the ocean experience without getting ones' feet wet, which translates into additional products, with the length of the Jetty potentially used more extensively in product development. For the Leeuwin Lighthouse, place significance might be further enhanced with cautious infrastructure intervention, in particular by adding artistic elements or pertinent events.

In addition to iconification of existing attraction points there may be room, and a need, to add additional 'hook' in terms of iconic attractions. Developing iconic attraction points goes beyond mere infrastructure intervention, needing to consider the co-creative mechanisms behind the emergence of icons. Stories that give significance are important and can generate self-reinforcing dynamics via social media communications. Sources of uniqueness, needed for good stories, are usually found in the specificities of a place. Therefore, the aim of any newly added major attraction point should be to embody and represent the region's core competences and to turn an abstract regional USP into a tangible experience.

Initial ideas include:

- *Markets*: Permanent food and art markets offering immediate access to guaranteed local produce, including seafood and wine, convey what the region stands for. They allow for shopping experiences with bargaining features, as well as food tasting opportunities and might address restricted shopping hours that are perceived by some Asian visitors as a barrier.
- *Surf Centre*: A “living” surf museum combined with a surf education centre, offering beginner courses in surfing. It should be a centre for experiencing the surf culture, presence and history of surfing in the region, and include elements such as art exhibitions, a surf shop, a surf-styled bar and/or restaurant. Obviously, ideally positioned at the beach front.
- *Marine Discovery Centre*: As marine wildlife are a relevant driver for Asian visitation, better networks for existing attraction points towards a multi-site experience, or to conceiving additional marine discovery centre(s) that cover(s) additional themes.
- *Wine Centre*: Consideration of ASW’s wine competence, and whether it can be showcased in a wine centre or museum. However, this may be part of a more broadly positioned attraction point, such as the markets discussed above.
- *Bee Centre*: A more niche-opportunity but one very much rooted in the uniquely healthy environment, with probably the healthiest bees in the world, would be a Bee and Honey Centre. However, this is probably best integrated into a larger and more broadly positioned attraction point such as the above-mentioned markets.
- *Forest & Wildlife Discovery Centre*: According to some suggestions there is room for better delivery of the forest theme through new products and stronger marketing emphasis.

*Events*: Next to major events in the food and wine area, the Margaret River Pro surfing, and filming of activities, there seems to be room for adding further events to the region to increase awareness in an international context. This could include an alternative music festival or major mountain bike events, if this special interest group is to be targeted. Moreover, a networked food festival where all producers in a wider area open their doors and provide tastings, barbecues and music as well as means of transport between the different locations is worth considering.

## Recommendation: Iconic attractions

WHAT	HOW
<p>Boosting awareness, visibility and attractiveness by increasing the number of iconic attractions.</p>	<p><b>Product development</b></p> <p>Increase the iconic status of existing attraction points, e.g.</p> <ul style="list-style-type: none"> <li>• Work with the Busselton Jetty to develop further products that convey the value propositions ("ocean experience without getting ones' feet wet", "longest Jetty") <ul style="list-style-type: none"> <li>• Food events on the Jetty</li> <li>• Expanding the underwater experience</li> <li>• Augmented reality along the jetty that allows to see underwater life, etc</li> </ul> </li> <li>• Work with the Leeuwin Lighthouse to further underline the significance of the place <ul style="list-style-type: none"> <li>• The scenery can provide an invaluable setting for artistic projects</li> <li>• There is also opportunity to combine this with special events, etc</li> </ul> </li> <li>• Add an initial hook for Asian visitors, linked to the core competences of the region; options can include but are not limited to <ul style="list-style-type: none"> <li>• Permanent food and arts market</li> <li>• Surf centre: 'Living' surf museum with surf training and education centre</li> <li>• Multi-site/networked marine discovery centre</li> <li>• Wine centre</li> <li>• Interactive museum that showcases both land-based &amp; marine-based features</li> <li>• Forest and wildlife discovery centre</li> <li>• Events, in the areas of (alternative) music, networked food festival, MTB event</li> </ul> </li> </ul> <p><b>Communication:</b></p> <ul style="list-style-type: none"> <li>• Trigger the 'iconification' of an attraction point by inviting social media influencers, celebrities, film producers, video game producers, book authors etc. (Asian market)</li> </ul>

- **Recommendation 4:** Increase in activities – Adding new experience-based products: food and activity-based.

Many Asian visitors, but especially visitors from China, are highly interested in ensuring efficient tourism experiences. In laymen terms this means doing many activities in a short period of time, with a preference for increased activity to ensure good returns on time and money invested. 'Learning' can provide high yield in this regard. Therefore, the attractiveness of ASW for Asian markets can be strengthened, along with the length of stay, by increasing the density of available quality activities.

In addition, Chinese outbound tourism appears to be increasingly experience, activity and special-interest driven. Gazing and taking photos are no longer enough, they also crave tastings of local food and local produce. Hence, food, but also other typical Western Australian activities, can be an important element to increase attractiveness for Asian visitors. However, they should be short to moderate in their duration and presented as hands-on experiences, with a learning component. These activities should also be linked to the region's core competencies, as this ensures a consistent storytelling about ASW.

Areas for product development in terms of activities might include:

- o *Experiencing local produce:* Allowing picking/catching of food, cooking it and then eating it, including in the contexts of bush food, seafood, and farm stays;
- o *Experience the Aussie way of life:* Offering crash-courses in stand-up paddle boarding and possibly surfing on secluded beaches (including renting of the required gear);
- o *Experience native wisdom:* Providing for light to moderately long Aboriginal experiences, including bush food/sea food and bush medicine components. Dining options that more consistently integrate native foods remain a largely untapped potential as well;



- o *Experience food on the beach:* Asian visitors love both food and the beaches in ASW. Increasing the number of opportunities would encourage enjoyment of both elements in a combined manner, such as via beachside dining options or barbecue spots close to the beach;
- o *Experience the dramatic ASW nature:* Soft introductions to Australian nature, such as The Gap in Albany or the Granite Skywalk in the Porongurup National Park allow for spectacular nature experiences in a controlled environment. This is very much appreciated by Asian visitors and could be replicated in other ASW locations.

It is important to remember that for many Asian visitors value for money is an important driver in their tourism decision-making. This does not however mean that offers necessarily need to be cheap. Positioning some scarce luxurious activities, such as Aboriginal experiences, or adding luxury activities such as balloon flights (flying is a scarce activity in China) might be an opportunity to increase value and thus attractiveness for Asian visitors.

### Recommendation: Increase in activities

WHAT	HOW
Adding new experience-based products around food and activities.	<b>Product development</b> <ul style="list-style-type: none"> <li>• Work with farms/farm stays, fishermen and Aboriginal providers to develop more activities that allow visitors to pick/catch their own food, cook it and then eat it (bush food, seafood, farm stays)</li> <li>• Work with surf schools/rentals to offer crash-courses in stand-up paddling and (possibly) surfing on secluded beaches (including renting of the required gear)</li> <li>• Work with Aboriginal providers to provide for light and moderately long Aboriginal experiences, possibly including bush food/sea food and bush medicine components</li> <li>• Work with Aboriginal providers/restaurants to develop dining options that more consistently integrate native foods</li> <li>• Work with government and cafes/restaurants to increase the number of opportunities to enjoy food and beach in a combined manner such as via beachside dining options or barbecue spots close to the beach</li> <li>• Soft interventions into nature such as The Gap in Albany or the Granite Skywalk in the Porongurup National Park allow for spectacular nature experiences in a controlled environment. This is very much appreciated by Asian visitors and could be replicated in other locations in ASW.</li> </ul>
WHY	
Many Asian visitors are highly interested in ensuring efficient tourism experiences, which means doing many activities in a short period of time. They prefer to be active to ensure good returns on their invested time and money. "Learning" can be considered to provide high yield in this regard.	

- **Recommendation 5:** Self-drive experience – Further improving the self-drive experience.

Many interviewees reported being self-driving visitors in ASW, with results emphasising the opportunity to have a great self-drive experience was a main motivation to travel to ASW these visitors. These findings are congruent with those by Xia *et al.* (2018), confirming that while Chinese visitors are often incorrectly perceived to be group-tourists, they have a strong interest, and a current practice, in self-driving with ASW providing opportunities to drive on good roads, in wide and open spaces, and with more affordable rental cars than in many Asian contexts.

However, it also became clear that Asian visitors are often left alone in making the most out of their aspired self-drive experiences. Improving the self-drive experiences may include:

- o Collaboration with rental car providers to provide “typical Aussie cars”;
- o Collaboration with rental car providers to provide equipment options to encourage “typical Aussie experiences,” such as camping gear, surfing gear, and fishing gear;
- o Improving phone coverage for navigation;
- o Ensuring road safety by giving clear and easy access to WA’s road rules;
- o Developing specific experiential itineraries;
- o Improving the spaces in between main settlements and attraction points, such as stops and rest places.

#### Recommendation: Self-drive experience

WHAT	HOW
Improving the self-drive experience by providing guidance to make most out of their aspiration.	<b>Product development:</b> <ul style="list-style-type: none"> <li>• Develop and provide a basic travel kit (maps, instructions, travel distances, destination info, translations)</li> <li>• Work with hire car providers to ensure that they provide digital-ready infrastructure (board computer / Asian language ready)</li> <li>• Work with hire car providers so that they can become one-stop-shops for drive-away ASW self-drive experience kits, including in particular               <ul style="list-style-type: none"> <li>• the option of a typical “Aussie Experiences” kit (e.g. camping gear, surfing gear, fishing gear);</li> <li>• a list of modular experiences packages (see “accessible experience initiative”) including themed itineraries (food and wine, marine environment, Aboriginal history, mix of all...) as well as bookable packages that can be integrated into a self-drive travel experience.</li> </ul> </li> <li>• Develop integrated, bookable self-drive packages (including rental car, attraction vouchers, accommodations)</li> <li>• Improve phone coverage throughout ASW</li> <li>• Develop roadhouses into service hubs</li> </ul>
The opportunity to have a great self-drive experience is an important motivation to travel to ASW for some Asian visitors.	<b>Distribution:</b> <ul style="list-style-type: none"> <li>• Dynamic packaging / modular packaging opportunities, ideally fully online</li> <li>• Collaborating with hire car providers (in Perth)</li> <li>• Collaborating with visitor centres, accommodation providers, road houses</li> </ul>

- Recommendation 6: Getting digital ready – Getting digital ready in order to become more Asia-friendly.

The findings of this research report strongly call for improved internet access via wireless and phone coverage. Asian visitors are amongst the heaviest users of smartphones, which are increasingly become the control centre for their social life. They are very disappointed if high-quality internet access is not provided. While a significant investment, access to free high quality WiFi and consistent phone coverage would ensure Asian visitors are “enrolled as co-marketers,” in that they can share their photos and comments in real-time with their peers. In fact, investing in wireless coverage could be considered as marketing expenditure. Furthermore, investing in phone coverage also contributes to improving self-drive experiences, as many self-driving Asian

visitors use online navigation systems for orientation. Hence, this report calls for further extension of mobile coverage throughout the region, as well private business recommendations to offer free, quality WiFi access to visitors.

Other destinations, such as London and Dubai, have installed so-called 'smart benches' with the aim of becoming smarter cities by improving the digital experience of residents and visitors alike. Solar-powered smart benches may be an option for ASW, providing wireless coverage, phone recharge points, interactive multi-language information and information on the cleanliness of the environment at major tourism hotspots throughout the region.

Last, but not least, being multi-language conveys a sense of welcomeness to visiting Asians, while providing the opportunity to capture all the information needed to fully comprehend an experience. From this perspective, it is a relevant signal of cross-cultural respect, but also has experiential implications with ASW providers making stronger and more concerted efforts to provide information about places, attraction points and other information outlets (e.g. menus) in multiple languages. Multi-language information can easily be accommodated with the help of technology, in particular, by using QR codes.

*Smart bench examples for illustration:*

Smart Palm:

- <https://cityos.io/view.competitor/28533/Smart-palm>
- [https://www.youtube.com/watch?time\\_continue=86v=2sVLAZ40MEc](https://www.youtube.com/watch?time_continue=86v=2sVLAZ40MEc)

Strawberry Smart Benches:

- <http://smartbench.london/>

### Recommendation: Getting digital ready

WHAT	HOW
Getting digital ready through an improved access to internet via wireless and phone coverage.	<ul style="list-style-type: none"> <li>• Working with government and communication providers to extend the phone coverage throughout the region</li> <li>• Working with private business to offer free quality WIFI access to visitors</li> <li>• Installing "smart benches" to improve the digital experience of residents and visitors alike <ul style="list-style-type: none"> <li>• These benches are able to provide wireless coverage, phone recharge points, interactive multi-language information as well as some information on the environment at major tourism hotspots in the region</li> </ul> </li> <li>• Work with attraction points, accommodation providers and restaurants/cafes to offer Asian visitors a multilingual experience with the help of technology (especially QR codes)</li> </ul>
WHY	
Asian visitors are heavy users of smartphones. They are disappointed, if high-quality internet access is not provided. The access to free high quality Wi-Fi and consistent phone coverage also ensures that Asian visitors can be "enrolled as co-marketers", i.e. that they can share their photos and comments in real-time with their peers.	

- **Recommendation 7:** Accommodation as an experience – Turning accommodation into an integral component of the experience.

The findings of this research indicate some Asian visitors prefer to save on accommodation, to be able to spend more on activities and experiences. However, this is only true if we consider the less affluent portion of Asian visitors, and if we consider accommodations not to be part of the experience bundle. The wish to turn accommodation into an experience is also highlighted by the success of Airbnb in ASW (Pforr *et al.*, 2017; Volgger *et al.*, 2018).

Amongst affluent Asian visitors there is sometimes a complaint that ASW lacks luxurious accommodation offers. However, what this report suggests is increasing the number of accommodation offers that are closely linked to ASW's USP and core experiences. This means, increasing the diversity of accommodation offers, the number of high quality farm stays, accommodations on wineries, lodges that fuse location with architecture, the accessibility of cottages in forest areas and more up-market camping opportunities. In this context, there will be also room to respond to the need for more luxurious accommodation offers for affluent Asians.

#### **Recommendation: Accommodation as an experience**

WHAT	HOW
Turning accommodation into an integral component of the ASW experience.	<b>Product development:</b> <ul style="list-style-type: none"> <li>• Work with accommodation providers to increase the number of luxury accommodations in ASW <ul style="list-style-type: none"> <li>• Please note: What luxury means is dynamically changing.</li> </ul> </li> <li>• Work with accommodation providers to increase the number of accommodation offers that are closely linked to ASW's USP and core experiences <ul style="list-style-type: none"> <li>• Support the diversification of the accommodation industry in the region (promote entrepreneurial activity by having smooth approval processes, organising creativity workshops, excursions etc)</li> <li>• Collaborate with farmers and their associations to increase the number of quality farm stays (including stays on wineries)</li> <li>• Collaborate with accommodation providers and their associations as well as architects and local councils to promote an increased sensitivity towards the importance of architectural features for creating unique and authentic accommodation experiences</li> <li>• Work with Parks and Wildlife and other camping providers to provide for more up-market camping opportunities</li> <li>• Work with private owners and accommodation providers to increase accessibility of cottages for accommodation in forest areas</li> </ul> </li> </ul>
WHY	
There are segments in the Asian markets for whom the accommodation component is important – and they are used to certain accommodation standards.	

- **Recommendation 8:** Winter experiences – Improving the winter experience.

According to the study's findings, some relevant Asian markets, such as Singapore, Malaysia and Southern China, are interested in having winter experiences in ASW as they do not have the ability to enjoy winter within the tropical climates at home. Therefore, this report suggests that promoting winter experiences should become a priority. Thereby, the experiential components need to be emphasised, such as having accommodation and restaurants with wood fires instead of only gas or electrical energy powered heaters, and integrating the contrast of fresh air and hot water into wellness experiences. Additionally, an important component of the ASW winter experience incorporates whale watching.

## Recommendation: Winter experience

<p><b>WHAT</b></p> <p>Improving the winter experience in ASW.</p> <p><b>WHY</b></p> <p>Some relevant Asian markets such as Singapore, Malaysia and Southern China have a declared interest in having a winter experience in ASW. This is because they do not have the possibility to enjoy winter feelings in their tropical climates at home.</p>	<p><b>HOW</b></p> <p><b>Product development:</b></p> <p>Strengthen the experiential component around winter experiences, e.g. by</p> <ul style="list-style-type: none"> <li>Developing a guidebook for accommodation providers, cafes and restaurants containing examples of components of authentic winter experiences (e.g. emphasising the role of wood fire and specific foods)</li> <li>Working with accommodation providers to develop fresh air/hot water wellness experiences</li> <li>Increasing the density of the winter events calendar with additional typical winter events</li> <li>Working with farmers and restaurants to develop (multiple) food series limited to a specific period in the winter months to allow to sample winter food (e.g. around truffles, chestnuts, orange, apple, pears, asparagus etc), but not limited to a specific event and a single location (e.g. "asparagus weeks")</li> <li>Developing winter events in the caves, building on their warm atmosphere and relatively dry environment</li> <li>Working with accommodation providers and owners to offer stays in warm cottages in the forests</li> </ul> <p><b>Distribution:</b></p> <ul style="list-style-type: none"> <li>Develop some flexible, modular packages around the winter experience in ASW</li> </ul>
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- **Recommendation 9: Asian food options** – Including Asian food options to show multi-cultural awareness and respect.

Asian visitors appreciate when their strong and ever growing willingness to taste authentic local food is paired with the availability of Asian food options. Although the desire to access Asian food options does differ in degree and frequency based on source country, source region (metropolitan vs rural) and travel experience, the findings of this report suggest strategically promoting the inclusion of some Asian fusion food options into to the menus of ASW's cafes, restaurants and hotels, particularly in a breakfast context. In terms of drinks, among the variety of drinks on offer, green tea should always be an option.

Asian visitors would also appreciate slightly extended opening hours. Given the lack of such options at present, this could be seen as a business opportunity as well.

## Recommendation: Asian food options

WHAT	HOW
<p>Inclusion of some Asian (fusion) food options: Accommodation / hotels supermarkets restaurants, cafes.</p>	<p><b>Product development:</b></p> <ul style="list-style-type: none"> <li>• Work with restaurants to include halal food options into menus (Malaysian and Indonesian travellers)</li> <li>• Work with accommodation providers to offer Asian cuisine essentials as part of the in-room product offering, e.g. comfort stay goodie bags (e.g. instant noodles, green tea)</li> <li>• Work with accommodation providers, restaurants, cafes and takeaways to include Asian food options on their menus (with particular regard to breakfast menus), or develop at least some Asian friendly fusion options</li> <li>• Enable/encourage providers to translate menus into different languages (consider the use of technology such as QR codes)</li> <li>• Consider encouraging the establishment of (high-quality) Asian or Asian-inspired restaurants in selected places</li> </ul> <p>• Please note: It is probably not indispensable to have both – more Asian food options in existing eating places and more specifically Asian-oriented restaurants.</p>
WHY	
<p>Many Asian visitors would like to have the availability of Asian food options within their destination and will appreciate it as a gesture of cross-cultural awareness and respect.</p>	

- Recommendation 10: 'Cook at home' experience – Improving the cook-at-home experience.

Cooking at their accommodation is an alternative way for many Asian visitors to ensure they can combine the tasting of local food with a sufficient supply of familiar Asian flavours. Hence, accommodation providers might want to consider making basic facilities available to allow for cooking. This also encourages shopping at grocery stores as an element of the overall tourism experience for partially self-catering Asian visitors. Recommendations to improve the tourism shopping experience could therefore include clearly indicating WA or locally sourced food, considering the shopping centre as a touchpoint for promoting the region and ensuring well-assorted Asian food sections.

## Recommendation: 'Cook at home' experience

WHAT	HOW
<p>Improving the 'cook at home' experience for Asian visitors in their accommodations.</p>	<p><b>Product development:</b></p> <ul style="list-style-type: none"> <li>• Work with accommodation providers to provide basic facilities to allow for cooking 'at home'</li> <li>• Work with accommodation providers to provide basic Asian cooking infrastructure / appliances (rice cooker, chopsticks, wok, tea pot etc)</li> <li>• Work with supermarkets to establish/revise Asian food sections by offering most sought after products by Asian tourists</li> <li>• Work with supermarkets, grocery stores and bottle shops to encourage them to clearly indicate local (Western Australian) food &amp; drinks (wine)</li> <li>• Accommodation providers can provide comfort stay goodie bags (e.g. instant noodles)</li> </ul>
WHY	
<p>Many Asian visitors would like to make sure that they can combine the tasting of local food with a sufficient supply of familiar flavours from Asia.</p>	

The recommendations suggested in this report are relevant to a broad set of stakeholders, ranging from the Federal Government through to individual tourism providers in the South West and Perth regions of Western Australia. Table 2 lists some of these stakeholders and the recommendations that may be most relevant to each group.

**Table 2** Stakeholders and suggested recommendations

Stakeholders	Recommendations
Federal Government and telecommunication companies	Getting digital-ready (Extend mobile phone coverage)
WA Government/Tourism WA in cooperation with SWDC & ASW	Clarification of the unique selling position (USP) Iconic Attractions Self-drive experience Increase in activities Bespoke experiences
Individual tourism providers in cooperation with SWDC & ASW	Asian food options Accommodation as an experience Cook at home experience Winter experience Increase in activities Iconic Attractions Self-drive experience Bespoke experiences Getting digital-ready (Free quality WiFi access)

As a final note, it is necessary to highlight that the focus of this study has been on Asian visitation to ASW. This does not however mean many of the findings and suggestions would not hold for other visitor groups, and similarly, also for other regions in Western Australia, Australia, and the world. In fact, despite some undeniable differences in accentuation, we should remain cautious in over-emphasising the difference between Asian visitors and visitors from other source markets, as overall there might be more commonalities than differences.







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