



eDestinations

Global best practice in tourism
technologies and applications

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eDestinations – Global best practice in tourism technologies and applications

1. Introduction

This report was prepared by Professor Dimitrios Buhalis and Ramona Wagner of the Bournemouth University eTourism Lab for the Australian Tourism Data Warehouse (ATDW). It provides an expert opinion on technology and tourism used for destination Australia through an eTourism benchmarking and global best practice analysis.

The Project is developed in collaboration with ATDW and its key objectives are:

- Analyse best practice globally through a comprehensive benchmarking exercise
- Identify Australia's position within the benchmark
- Recommendations for Australia's future implementation of technologies and applications
- Insights into the future of eTourism and destination marketing

Ultimately the project is assessing the online presence of global destinations with the view to contribute to Australia's national online strategy. Therefore the report aims to identify global best practices in tourism technologies and applications and compares these best practice examples with Australian best practices. In addition to that, recommendations are drawn for Australia in terms of a way forward regarding the future use of technologies in tourism. Insights will be given in future destination marketing strategies that are of interest for all destinations worldwide. Current research in tourism is already acknowledging the benefits of the implementation of new and ground-breaking technologies.

The research of this report is based on a benchmark analysis of about 200 factors for 30 international tourism destinations. This identifies global best practices and potential niche factors that no destination has implemented yet. The top 5 best practice destinations for every factor within the benchmark table were identified. By this means, the current position of Australia within the benchmark could be identified along with the strengths and possible weaknesses of their website and social media presence. Ultimately, recommendations are drawn for Australia in terms of possible technologies and applications that can be

implemented on the basis of the benchmark. These will be broad and focus on different strategic aspects.

2. Methodology

The research for this report was based on a benchmark analysis and an online survey.

BENCHMARKING

The sample was selected online by choosing the best 20 online international destinations on the basis of articles and discussions of the industry. Expert opinion finalised this list. In addition to that, 5 city destinations and another 5 States within Australia were selected in order to enable a comparison between Australian destinations and international destinations.

The following destinations are the benchmark sample:

- Australia
- 5 Australian city destinations:
 - Sydney, Melbourne, Adelaide, Perth, Brisbane
- 5 Australian States:
 - Queensland, New South Wales, Western Australia, South Australia, Victoria
- 20 International destinations:
 - Puerto Rico, NYC, California, Las Vegas, Montreal, Sweden, Germany, Vancouver, Hong Kong, British Columbia, New Zealand, Canada, Austria, Cape Town, South Africa, Norway, Singapore, UK, Thailand

The following stages and criteria were implemented into the benchmark table:

- Before holiday: Inspire, Inform, Engage
- During holiday: Facilitate at destination
- After holiday: Remember , Share and engage

The average scores for every factor within the table were compared with the individual destination scores. In order to depict the results of these calculations a colour scheme was implemented. The following colours were given for the values of destinations in order to figure out which destinations scored above or beneath average and identify the best practice examples:

yellow: + 3 and over dark green: + 2 - 2.99 green: + 1 - 1.99 light green: 0 – 0.99
blue: average light pink: 0 – (-0.99) orange: (-1) – (-1.99) red: (-2) – (-2.99)
purple: (-3) and over

INDUSTRY WORKSHOP AND ACADEMIC INPUT MEETINGS

The second part of the primary research was based on :

- Two academic input meetings – 11th July at Victoria University in Melbourne chaired by Professor Brian King of Victoria University and 20th July at Queensland University in Brisbane chaired by Dr Noel Scott.
- A one day workshop organised in Melbourne on the 12th July 2012 which included a wider range of Australian Tourism stakeholders. The event was organised and hosted by Liz Ward of ATDW and Paul Baron, Tourism Victoria and IFITT Board Member. The workshop was facilitated by Professor Dimitrios Buhalis, Bournemouth University and IFITT President. Rosanna Leung of Hong Kong Polytechnic University and IFITT Board Member and Lenore Neath of Tourism Victoria assisted with minute taking and collecting the contributions of participants.

eTourism Destinations WORKSHOP AGENDA THURSDAY, 12 July 2012

Time	Details	Comments
10:30	Morning Tea	Level 46, 55 Collins Street, Melbourne
11:30	Welcome and Introductions to "Australian Tourism Digital Workshop" Hosted by Professor Dimitrios Buhalis, Liz Ward and Paul Baron	
11:15	"Where are we now?" Break out session	
12:30	Lunch	
13:15	Where do we want to be? Break out session	- Inspiring, attracting & serving the Customer - Getting ourselves organised & co- ordinated
14:45	Afternoon Tea	
15:00	The Benchmarking Results of Global Best Practice	
15:30	The Way Forward - what could it be?	
16:00	Conclusion of workshop	
17:00	IFITT Networking Event	Young & Jacksons - Chloe's Bar Corner of Swanston & Flinders Streets

Workshop Participants LIST

NAME	ORGANISATION
Anita Clark	Anita Clark Tourism Services
Peter Dean	Australian Capital Tourism
Andrew McIntyre	Australian Tourism Data Warehouse
Liz Ward	Australian Tourism Data Warehouse
Felicia Mariani	Australian Tourism Export Council
Jia (Jackie) Rong	Deakin University
Kellie Monger	Destination Melbourne
Tina Seirlis	Destination Melbourne
Brett Ince	Great Southern Tour Route
Roger Grant	Great Southern Tour Route
Dimitrios Buhalis	IFITT
Rosanna Leung	IFITT
Andrew Bennett	InsuranceCONNECT
Annette Sharp	ItoursAustralia
Jeff Sharp	ItoursAustralia
Donna Meredith	Keystone Corporate Positioning
Outi Niininen	La Trobe University
Jonathon Ryan	Lonely Planet
Sophie Ward	Lonely Planet
Aaron Tham	Monash University
Juliana Payne	National Tourism Alliance
Jason Cormier	Sensis
David Pyatt	South Australian Tourism Commission
Ward Tilbrook	South Australian Tourism Industry Council
Don Richter	Tourism Victoria
Nick Baker	Tourism Australia
Rapthi Thanapalasingam	Tourism Australia
Adam Coward	Tourism Northern Territory
Chris Chambers	Tourism Queensland
Leo Jago	Tourism Research Australia
Gerard McCarthy	Tourism & Transport Forum
Lenore Neath	Tourism Victoria
Paul Baron	Tourism Victoria
Ela Wolski	TripAdvisor
Nina Mistilis	University of New South Wales
Noel Scott	University of Queensland
Ulrike Gretzel	University of Wollongong
Brian King	Victoria University
Henk Meijerink	Victoria University
Lynne Hocking	Web Noise
Effie Lagos	William Angliss Institute

This workshop aimed at identifying the global and Australian industry perspective regarding the future of online destinations. The goal was to get an insight into the future vision for destination management systems and destination websites and social media presence. The workshop also attempted to solicit views as strategically as possible.

3 Benchmark Analysis

The benchmarking analysis demonstrated that key evaluation factors and the scores that Australian destinations achieved.

3.1 Before holiday - Inspire

Figure 1: Average scores Australian destinations – Inspire

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 1.0 / Destination website												
Visibility of website on search engines	4.33	0.67	-0.33	-0.33	-2.33	0.67	-1.33	-0.33	0.67	0.67	0.67	-0.33
Findability of website	4.57	0.43	0.43	0.43	-2.57	0.43	-2.57	-0.57	0.43	0.43	0.43	-0.57
SEO effective	4.07	-0.07	-0.07	-0.07	-3.07	-0.07	-2.07	-0.07	0.93	-0.07	-0.07	-0.07
organic or sponsored links	3.87	0.13	-0.87	0.13	-1.87	-0.87	-0.87	0.13	1.13	1.13	0.13	0.13
language switch	3.10	1.90	1.90	0.90	-2.10	-2.10	-2.10	-2.10	-0.10	-0.10	0.90	-0.10
how many languages?	3.10	1.90	0.90	-0.10	-2.10	-2.10	-2.10	-2.10	0.90	-0.10	-0.10	-0.10
eye catchers on website	3.90	1.10	-0.90	-0.90	0.10	0.10	-0.90	0.10	0.10	0.10	0.10	-0.90
videos	3.30	0.70	1.70	-2.30	-2.30	-0.30	-2.30	-2.30	0.70	1.70	0.70	1.70
interactive videos	1.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13
images	3.77	0.23	-0.77	-0.77	0.23	0.23	-0.77	-0.77	0.23	-0.77	-0.77	-0.77
diversity of images	3.73	0.27	0.27	-0.73	-0.73	1.27	-1.73	-0.73	0.27	0.27	-0.73	-0.73
interactivity on website	2.13	0.87	-1.13	-1.13	-1.13	-1.13	-0.13	-1.13	1.87	-1.13	-1.13	-1.13
links to social media?	3.47	0.53	-0.47	0.53	0.53	1.53	0.53	-0.47	0.53	-0.47	-0.47	-0.47
which social media applications?	3.83	-0.83	0.17	0.17	0.17	0.17	0.17	-0.83	0.17	-0.83	-0.83	0.17
destination blog linked to website	2.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00	-1.00
live webcam	1.13	-0.13	-0.13	-0.13	-0.13	-0.13	3.87	-0.13	-0.13	-0.13	-0.13	-0.13
strong first impression	3.53	1.47	-0.53	-0.53	-0.53	-0.53	-1.53	-0.53	-0.53	0.47	-0.53	-0.53
audio sounds	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
general impression of visual appearance	3.53	1.47	-0.53	-0.53	0.47	-0.53	-1.53	-0.53	0.47	0.47	-0.53	-0.53
information available for different themes (activities, geography, interests...)	3.37	0.63	-0.37	-0.37	-0.37	-0.37	-0.37	-0.37	-0.37	-0.37	-0.37	-0.37
Can consumers get an understanding of the types of holidays that are possible in the destination?	3.23	0.77	-0.23	-0.23	-0.23	-0.23	-1.23	-0.23	-0.23	-0.23	-0.23	-0.23
virtual reality application	1.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10
accessibility of website by using smartphones	3.73	0.27	0.27	0.27	0.27	0.27	0.27	0.27	0.27	1.27	0.27	0.27
features for people with audio impairment	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
features for people with visual impairment	1.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43	-0.43

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 2.0												
real time social network feed from Facebook	2.00	-1.00	2.00	-1.00	-1.00	2.00	-1.00	1.00	-1.00	-1.00	-1.00	2.00
real time social network feed from Twitter	2.03	-1.03	-1.03	0.97	-1.03	1.97	1.97	0.97	-1.03	-1.03	0.97	1.97
are consumers sharing their videos to inspire other travellers?	2.43	0.57	1.57	-1.43	-1.43	1.57	-1.43	0.57	1.57	0.57	1.57	0.57
regular C2C input	2.90	0.10	0.10	0.10	-1.90	-1.90	-1.90	0.10	0.10	0.10	0.10	0.10
are other travellers recommending the destination	3.03	-0.03	-2.03	-0.03	-2.03	0.97	-0.03	-0.03	-0.03	-0.03	-0.03	-2.03

Source: Data from Benchmark analysis

Key findings within the inspire phase:

Australia and its destinations mostly score above average within the inspire phase in comparison to other international destinations. There is a general gap regarding the implementation of interactive videos as only Montreal has integrated a virtual tour around the city in a highly creative way. Adelaide was the only destination to implement a webcam into their website where users can see certain attractions live. All Australian destinations should also consider implementing interactive technologies within their websites as this is only done in the form of virtual journeys through New Zealand. Most Australian destination websites appear to have limited or no interactivity.

The use of social media channels within the website is another factor that needs to be looked at as only Puerto Rico has a page on Pinterest which is an upcoming and quite successful social media site. Although Australia is using social media extensively these are often are not connected to the web site and there is a lack of interactivity and connectivity between the two.

Virtual reality applications is also another big opportunity for destinations as only New Zealand has implemented a virtual tour around their destination into the website.

In general Australian destinations perform well in the inspire phase but there are several factors that they may like to concentrate in order to improve the provision.

3.2 Before holiday – Inform

Key findings in the inform phase are summarised in Figure 2. Most Australian destinations are not utilising the technologies and applications available for destinations to their full potential. It is crucial for these destinations to improve their level of interactivity. They need to find creative ways of implementing virtual tours, recommendations and planning tools such as route planners in order to deliver adequate help in the planning stage of potential travellers. With the help of new technologies, the more advanced online destinations such as Australia can become efficient one stop shops.

Figure 2: Average scores Australian destinations – inform

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 1.0 / Destination website												
Range of information services	3.50	1.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	0.50	0.50	-0.50	-0.50
descriptive information	3.47	1.53	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47	0.53	-0.47	-0.47	-0.47
interactive information	1.40	1.60	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	1.60	-0.40	-0.40
news feed about destination	1.77	-0.77	-0.77	-0.77	-0.77	1.23	-0.77	-0.77	-0.77	-0.77	1.23	-0.77
are special events pointed out to travellers	3.23	0.77	0.77	0.77	0.77	0.77	-0.23	0.77	0.77	0.77	0.77	0.77
events calendar	3.20	1.80	-0.20	0.80	-0.20	0.80	-0.20	0.80	1.80	-0.20	-0.20	-0.20
Maps about destination	3.23	-0.23	-0.23	-1.23	-0.23	-0.23	-0.23	-0.23	0.77	0.77	0.77	-0.23
level of interactivity of maps	2.57	0.43	-1.57	-1.57	-1.57	0.43	0.43	0.43	1.43	1.43	-1.57	-1.57
topic related images	3.57	0.43	-0.57	-0.57	-0.57	0.43	-0.57	0.43	0.43	-0.57	-0.57	-0.57
photo gallery	2.90	2.10	-1.90	1.10	-1.90	2.10	-1.90	0.10	1.10	-1.90	1.10	-1.90
videos about specific information	3.30	0.70	-0.30	-2.30	-2.30	1.70	-2.30	-0.30	0.70	1.70	-0.30	0.70
different topics	3.30	0.70	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	0.70	-0.30	-0.30	-0.30
online guide about destination	1.97	-0.97	-0.97	2.03	-0.97	2.03	-0.97	-0.97	-0.97	-0.97	-0.97	-0.97
accessibility information	2.30	-1.30	1.70	1.70	-1.30	-1.30	1.70	-1.30	-1.30	0.70	0.70	1.70
accessibility guides	2.17	-1.17	1.83	0.83	-1.17	-1.17	1.83	-1.17	-1.17	1.83	-1.17	1.83
usability of website	3.93	1.07	1.07	0.07	-0.93	1.07	0.07	0.07	0.07	-0.93	0.07	0.07
are all links working	3.87	1.13	1.13	1.13	-2.87	1.13	1.13	0.13	0.13	0.13	0.13	0.13
easy navigation within the website	3.97	0.03	1.03	1.03	-0.97	0.03	0.03	0.03	0.03	0.03	0.03	-0.97
clear structure	3.97	0.03	0.03	1.03	-0.97	0.03	0.03	0.03	0.03	0.03	0.03	0.03
personalisation of website possible	1.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	1.87	-0.13	-0.13	-0.13
interaction with destination possible	3.17	-0.17	0.83	-0.17	-0.17	0.83	-0.17	-0.17	-0.17	0.83	0.83	-0.17
virtual tours	1.80	-0.80	-0.80	-0.80	-0.80	-0.80	-0.80	-0.80	3.20	-0.80	-0.80	-0.80
customisation possible	1.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17
special sections in website for special interest	2.13	0.87	0.87	0.87	0.87	-1.13	-1.13	1.87	-1.13	-1.13	1.87	0.87
does the destination have a blog	2.4	-1.40	1.60	0.60	-1.40	-1.40	-1.40	-1.40	1.60	-1.40	-1.40	-1.40
route planner	1.80	2.20	1.20	0.20	-0.80	-0.80	-0.80	1.20	-0.80	-0.80	-0.80	2.20
public transport tool	1.17	-0.17	1.83	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17
itinerary planning tool	2.03	1.97	-1.03	-1.03	0.97	-1.03	-1.03	-1.03	-1.03	1.97	-1.03	-1.03
interactive idea generator	1.40	2.80	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40	-0.40
recommendations by other travellers	1.27	2.73	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27
online audio guide about attractions	1.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20	-0.20
links to industry	1.97	1.03	1.03	1.03	1.03	-0.97	-0.97	1.03	-0.97	1.03	-0.97	-0.97
links to hotels	3.27	0.73	-0.27	0.73	0.73	-0.27	-1.27	-0.27	-0.27	1.73	0.73	0.73
links to airlines	2.77	0.23	0.23	0.23	-1.77	0.23	-1.77	0.23	0.23	1.23	0.23	0.23
links to transport providers	2.97	1.03	1.03	0.03	-1.97	0.03	-0.97	-0.97	0.03	0.03	0.03	0.03
plug in of other applications on website	1.47	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47	1.53	-0.47
plug in weather application	2.67	-1.67	1.33	-1.67	1.33	-1.67	1.33	-1.67	1.33	1.33	-1.67	1.33
plug in transport application	1.17	1.83	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17
Web 2.0												
do travellers share information on social media sites?	2.83	0.17	0.17	0.17	-1.83	0.17	-1.83	-0.83	0.17	0.17	0.17	0.17
photo gallery on social networking sites	3.33	-0.33	0.67	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	0.67	-0.33
approachability of destination in social media	3.23	-0.23	-0.23	0.77	-0.23	-0.23	-0.23	-0.23	0.77	-0.23	-0.23	-0.23
problem solving	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
do travellers share experiences with other users?	2.63	1.37	-1.63	0.37	-1.63	-0.63	-1.63	-1.63	0.37	0.37	0.37	-1.63

Source: Data from Benchmark analysis

3.3 Before holiday – Engage

Key findings in the engage phase are demonstrated in Figure 3: All Australian destinations need to improve the engage phase by implementing a community within their website such as the successful Sweden example as well as creating sections for users to read and write reviews. Thailand is doing this very effectively within their website already.

Figure 3: Average scores Australian destinations – engage

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
<i>Web 1.0 / Destination website</i>												
communities for potential travellers on website?	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30
live chat for questions	1.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10
Can travellers read and write reviews on website	1.53	2.47	-0.53	-0.53	-0.53	-0.53	-0.53	-0.53	-0.53	-0.53	-0.53	-0.53
Accessibility of destination representatives	2.93	0.07	-0.93	0.07	0.07	0.07	0.07	0.07	0.07	0.07	1.07	-0.93
Are there security and privacy policies	4.57	0.43	-1.57	0.43	0.43	0.43	0.43	-0.57	-0.57	-0.57	-0.57	-0.57

Source: Data from Benchmark analysis

3.4 During holiday – Facilitate at destination

Key findings at the “facilitate at destination” phase are presented in Figure 4. All Australian destinations within the benchmark are doing better than the majority of their competitor destinations in terms of the provision of information and maps. However, the overall scores even for the best destinations are very small demonstrating clearly that destinations fail to take advantage of the emerging technologies. Destinations can become more competitive by integrating booking tools for accommodation which most of the Australian destinations did.

The integration of reservation tools for attraction or event tickets still needs to be included into Australian destination websites. Best practice is evident in the approach taken by Las Vegas, Sweden and Vancouver. As more and more users are having smart-phones, the integration of apps as well as location based services will really become crucial for the future of online destinations.

All destinations should utilise technologies that can improve the personalisation of the content of the websites as well as having personalised itinerary planners on the websites. In general, there is a trend for the search for unique experiences within a destination. Thailand as a destination has integrated a lot of user generated content in the form of videos, images and stories about personal, unique Thailand experiences. Canada and Germany are two other destinations that differentiate their tourism product by different special interest groups or different experiences for individual traveller types. These concepts should be taken into consideration in terms of their approach and use of new technologies.

Figure 4: Average scores Australian destinations – facilitate at destination

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 1.0 / Destination website												
Downloadable information	2.07	0.93	-1.07	-1.07	-1.07	1.93	-1.07	-1.07	1.93	-1.07	1.93	0.93
Brochures	2.63	0.37	-1.63	-1.63	1.37	1.37	-1.63	-1.63	2.37	-1.63	1.37	-1.63
Printable version of websites	2.50	1.50	0.50	0.50	0.50	-1.50	-1.50	1.50	-1.50	-1.50	1.50	1.50
Guides for smartphones	1.87	-0.87	3.13	-0.87	-0.87	-0.87	-0.87	1.13	-0.87	-0.87	-0.87	2.13
Downloadable apps for iPad, iPhone, Blackberry, Android	2.97	1.03	2.03	0.03	-1.97	0.03	-1.97	1.03	0.03	0.03	-1.97	2.03
events calendar	3.37	0.63	1.63	0.63	0.63	0.63	-0.37	0.63	1.63	-0.37	-0.37	0.63
Booking/ reservation tools available for accommodation	2.43	-1.43	1.57	1.57	1.57	-1.43	-1.43	-1.43	-1.43	1.57	2.57	-1.43
Reservation tools for attraction tickets	1.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27	-0.27
Reservation tools for events tickets	1.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17
personalisation of website possible	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
help line in destination (phone or Skype)	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
last minute or special offers	2.87	0.13	1.13	0.13	1.13	-1.87	-1.87	0.13	0.13	0.13	0.13	1.13
RSS feed	1.67	-0.67	-0.67	1.33	1.33	-0.67	-0.67	1.33	1.33	-0.67	-0.67	-0.67
context based services	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
location based services	1.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33	-0.33
gamification	1.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13
treasure hunt	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
augmented reality app	1.13	-0.13	3.87	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13	-0.13
map app	1.37	1.63	1.63	-0.37	-0.37	-0.37	-0.37	-0.37	1.63	-0.37	-0.37	-0.37
transportation finder	1.40	1.60	1.60	1.60	-0.40	-0.40	1.60	-0.40	-0.40	-0.40	-0.40	-0.40
downloadable mp3 audio guide	1.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10
personalised itinerary planner	1.83	1.17	-0.83	-0.83	-0.83	-0.83	-0.83	-0.83	-0.83	-0.83	1.17	-0.83
Are personalised itineraries downloadable?	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30
Weather forecast on website	2.60	-1.60	0.40	-1.60	1.40	-1.60	2.40	-1.60	1.40	1.40	-1.60	1.40
Experience finder by traveller types?	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	1.70
Search by type of experiences possible?	1.97	-0.97	-0.97	-0.97	-0.97	-0.97	-0.97	-0.97	1.03	-0.97	-0.97	-0.97
Search for keywords on website	4.13	-0.13	-0.13	0.87	0.87	0.87	-3.13	-0.13	-1.13	-0.13	-0.13	-0.13

Source: Data from Benchmark analysis

3.5 After holiday – Remember

Key findings at the remember phase are presented in Figure 5. All destinations really underperform and fail to take advantage of the technological tools available, All destinations should ensure to have a newsletter in place for users to get regular updates about the destination. The after holiday phase is crucial to build up a relationship with users in order to remember the destination. Personal accounts where users can store information and itineraries are great ways of triggering repeat visitation to the website. All Australian destinations can improve their implementation of technologies and applications within this phase. Some best practice examples include the podcasts on the website for users to download as Thailand has on their website, or an online shop as NYC has are additional ways of making users remember the destination.

Figure 5: Average scales Australian destinations – remember

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 1.0 / Destination website												
Loyalty programme	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sign-up for a destination newsletter	3.00	-2.00	0.00	0.00	0.00	0.00	-2.00	1.00	0.00	1.00	-2.00	0.00
Podcasts	1.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	2.77	-0.23	-0.23	-0.23
Personal trip basket for information	1.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70	-0.70
Storage of personal itineraries	1.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57	-0.57
Online shop available	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30
Online competitions on website	1.27	-0.27	-0.27	-0.27	1.73	-0.27	-0.27	2.73	-0.27	-0.27	-0.27	-0.27
Sign-up for personal account on website	1.90	-0.90	-0.90	-0.90	1.10	-0.90	-0.90	-0.90	1.10	0.10	-0.90	-0.90
Storage of itineraries and information possible on account?	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	0.70	-0.30	-0.30
Online campaigns	1.23	2.77	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23	-0.23

Source: Data from Benchmark analysis

3.6 After holiday – share and engage

Key findings at the share and engage phase are presented in Figure 6. None of the destinations are performing really well in these evaluation factors. Thailand and British Columbia can be seen as best practice examples within the share and engage phase as they address some of these factors. These destinations are the only ones in the benchmark that are aware of the importance of sharing and engaging with consumers. Destinations that want to be successful in the future need to give users the opportunity to upload videos, images or stories for other users to read.

Figure 6: Average scores Australian destinations – share and engage

Key evaluation factors	Average scores	AU	ME	SY	PE	BR	AD	NSW	QU	WA	SOA	VI
Web 1.0 / Destination website												
Can pictures be uploaded on website by travellers	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	1.70	-0.30
Can videos be uploaded on website by travellers	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	1.70	-0.30
Can travellers upload personal reviews of experiences	1.47	-0.47	-0.47	-0.47	-0.47	2.53	-0.47	-0.47	-0.47	-0.47	-0.47	-0.47
Is the destination integrating Tripadvisor in the website	1.60	-0.60	-0.60	-0.60	-0.60	-0.60	-0.60	-0.60	-0.60	-0.60	-0.60	2.40
Can travellers write personal recommendations for accommodation?	1.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30	-0.30
Can travellers write personal recommendations for attractions?	1.50	-0.50	-0.50	-0.50	-0.50	2.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
Are there communities on website where users can join and discuss with other users?	1.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10	-0.10
Competitions on website?	1.17	-0.17	-0.17	-0.17	1.83	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17	-0.17

Source: Data from Benchmark analysis

Special sections for user generated content can be developed or like in the case of Sweden a separate community can be developed. For destinations it is crucial to understand the trustworthiness of reviews of other users which are used in reviewing websites such as Tripadvisor and think about their integration. By this means, destinations can become more transparent and sustain their future success. Australian destinations are missing a great opportunity in this area.

5 Workshop results and industry requirements

The workshops demonstrated a range of issues that participants felt will be critical for the eDestination of the future. This tourism system and tourism requirements were clustered in the times of interaction with consumers namely

- Before the trip
 - Use technology to inspire people
 - Use technology to inform people
- During the trip
 - Engage during their trip
- Post trip engagement

Participants had the opportunity to discuss in their groups these ideas and many actions points were taken by individuals to make improvements to their systems according to their strengths and weaknesses as well as their benchmarking scores.

- **Before the trip**

It was widely acknowledged that the vast majority of destination management organizations concentrate their efforts in the before trip period as their main objective is to bring prospective travelers to the destination. Most of systems are performing fairly well on this, having more than 10 years of experience and improvements. Issues for the future included:

Use technology to inspire people

1. **Images & Videos**

Participants emphasized that destination websites should facilitate use of images by using brilliant images and link these images to deeper information, background information such as location and other sceneries. User Generated Content is critical in developing image and video libraries cost effectively and to engage both local communities but also amateur photographers and cameramen to undertake this task. Destinations can create a digital library and visual communities about the destination so users could easily access required details. Destinations should ensure that all information is from trusted sources and set the pace and standards. The destination website should provide search engine that users not only can locate required text details, but also graphical images. Geotaging will be increasingly critical in this process as all images will be able to attributed to particular geographical locations and will be able to synthesize and represent the destination. Upon different travel needs, users can personalize their required information and videos. Some of the markets may have conflicting interests. For example the nudist or the gay market may have conflicts in image display with the family market. How the images are collected, indexed and distributed needs to reflect that and it is an area to explore.

Semantic web in the future will be able to categorise images and ensure that the right visual and multimedia information will be channeled to the right prospective markets. Other than images, destination could also provide TV advertisements, interactive TV, and videos. The integration of all in a coherent and comprehensive message is of critical importance for destinations to reinforce their brand and to display a coherent image to the world.

2. Information sharing

User not only could collect required text, images, and videos from the destination website, but also could share this information with others. Social Media is of critical importance here but also destination systems should have email and share buttons to support users to engage others in the information. Sharing could inspire people by word-of-mouth, bring people together, endorse the information in the website and increase the credibility of the information. It can also encourage group travelling of like minded people or people who share similar hobbies or participate in social groups and networks. Some innovative engagement in destinations has led to viral marketing. For example users can send out personalized e-card via facebook and mobile apps, or elf themselves and send the customized information / images to their friends. This enables users to see yourself in it and gives them a motivation to share and go viral. Participants also suggested to invite users to show the things that inspire them e.g. books or music in association to destination. Destinations could lend tourists a camera so they could see the destination through eyes of the tourists, generate content, share on social media and make the experience personable.

3. Interactive platform (user generated content / social media)

Participants suggested that we should be analysing all digital platforms of GTOs (government tourism organizations), not just destination websites to have a holistic understanding of the information provided. Social media in general provides multiple platforms, media, and tools that allow users to interact, communicate, and engage. Destinations both enjoy the emerging capabilities but they are also challenged and nervous with the plurality of views and images as well as with the possibility of negative images that could emerge. With similar interests, tourists could gather together and inspire each other. With the endorsement of user generated content, the credibility of the information could be improved. The platform that allows the user to engage with the destination must be open, adaptable, available and able to track who, when and what kind of activities are occurring. Currently there is a great number of social media platforms that allow that sharing and a coordination of all areas where destination image is displayed should happen through monitoring and management. The message delivered across platforms must be clear and consistent with the destination capabilities. Destinations find it challenging to monitor all different systems and are potentially threatened by the lack of control. Besides, destination should always be aware the new platforms in the digital world as well as monitor their online brand reputation across the Internet. The online destination should enable booking capability in order to assist prospective travellers to book what they have already seen. They should also integrate with other standard industry channels such as TripAdvisor, facebook and Pinterest etc. Destinations need to identify the right groups of people within the organization, the local community, the travellers/consumers communities and invite those who care to engage in social media. By tracking and analysing their behavior, destinations could identify special hidden or iconic destination features they want with accidental insights.

In addition, they can develop niche markets such as scuba divers, mushroom lovers etc to ensure that they differentiate their product and communicate with consumers. In addition destinations should provide travel planning tools such as mobile maps, journey planner so tourist could plan their trip ahead.

4. Personalization

Personalisation is emerging as a strong requirement. Destinations should avoid using one-of-a-kind information as different users have unique requirements and needs. Know your customer better as they are your target audience. Social media give destinations incredible opportunities to get to know consumers as open profiles and enable them to appreciate individual consumers and also to address groups of like minded people. Social media sites – such as the Tourism Australia facebook page has 3.2 million followers, but should we start looking at social media microsites perhaps to address personalized interests - for example, scuba divers, breastfeeding mothers. Destinations should not just give people a list of A to Z of local facilities but create clusters that address particular needs. Public sector organizations should not be too concern about waiting until the last small business joins in, which will slow down the implementation progress. They should be concerned about offering everybody a fair chance to benefit from the infrastructure and to work with those at the forefront to develop their online capability, visibility, desirability and ultimately conversion and yield. Information included must be timely with surprising, delight and seasonality “unusual” tips that will generate authentic, inspiring and memorable experiences.

5. Gamification

Gamification is emerging as a new method of employing gaming technologies for the development of inspiring and engaging content online. Using interactive games to invite users to engage in information exploration and get connected with the destination will allow users to experience the destination in advance, motivate themselves to address their particular needs and engage in a deeper exploration of the destination.

6. Others

Provide expert options; associate with movies by indicating where it is filmed; brand and destination association e.g. UGG boots advertised in EU are filmed in outback; advocates across different markets, may also subdivided them into niche segments; viral marketing by humour images

Use technology to inform people

1. Maps

A map is a visual representation of the real world and they are critical for informing people and organizing experiences. The map function should provide sample itineraries showing the attractions, routes with recommended time of travel and adopting SimCity-like approach to add spots to user's own itinerary priorities. Users can rate the content what they look at using "1 to 5" and build their itinerary at the same time. Geo locating activities and attractions is critical for building itineraries.

2. Itinerary and Dynamic Packaging

Systems should enable users to dynamically build their itineraries and change it according to context based services. It was however recognized that hitherto itinerary builders are not widely used by consumers but consumers often use them to save "favourites". Users should be able to set up their budget and times, and the system could provide recommendations and routings. Based on the proposed itinerary, users can have a pre-trip video showing the places they will be visiting and perhaps engage with other travellers that have done the itinerary, locals or fellow travellers. Social media platforms such as WAYN and Tripadvisor can facilitate this process. Besides, the system could provide real-time information such as the opening time, weather and events, offering context based services. The system should be humanized so it can provide opinions based on personal and environmental circumstances to guide users to make decisions. Pull information - QR codes could allow the user to gather relevant content about what is happening now at their particular location. Apps like "Tripit" could consolidate information. The system could also be able to identify repeat customers so that known information about the destination could be avoided whilst loyalty can be rewarded and suggestions can attractions and activities not done before.

3. Gathering information

Know the background of the customer to provide the itinerary planning, journey planning, transportation and access information, and audio guide may be of use. Provide the format they want when they want it is also critical and perhaps alternative templates may be offered to facilitate users to build their itineraries and information pack the way they want it. Users can customize the information based upon their profiles and requirements like a dating website.

Engage during their trip

It was widely recognized that destinations are not proactive in engaging with consumers whilst at the destination. They often leave to the private sector operators to deliver the destination experience. It was felt that a more hands on approach will be required in the future. To the extreme the destination marketer in the future will be the people that manage the @destination or @brand twitter account as they will be responsible for the interactivity with prospective and active travellers.

1. Connectivity

To facilitate engagement, destinations need to support effective and efficient connectivity. Tourists want to stay in touch with friends so connectivity for tourists is very important. Free WiFi now is the key selection criteria in accommodation choice and a critical factor for engaging in dialogue. Destinations should provide cheap plans or free Wifi for tourists. Aeroplanes, boats, trains, buses should also be equipped with technology, internet and be interactive with tourist while they are on their way. Tourists should enjoy special phone packages, reduced roaming cost for better connectivity. Geelong will convert security cameras into free WiFi spots in the near future. The free WiFi services could be funded by the "cut of the ticket" (recommender engine) to fund it and also will be against marketing expenditure and cost of telecommunications.

2. SoLoMo Marketing

SoLoMo marketing is emerging fast as a major tool for innovative destination marketing. Tourists could pre-subscribe to location-based services / SOLOMO marketing so they could know what's happening nearby. Standardised sets of hashtags that the GTO's or LTA's distribute to operators and locals so that apps could push out information to twitter and can change the way a LTA should be established. QR codes can also lead people to specific sites that provide context based services, special offers, local engagement and other value added services. Apps could broadcast information that the traveller needs and points of interest via twitter with standardized hashtags to tourism operators and an expert should response live with information. Destinations should monitor twitter and other social media for key words and provide context based added value. They should also manage emerging situations, natural disasters and crisis through these means. Anyone could monitor and response to the hashtags. Adopt the concept of Apple SIRI, Travel Siri has geo awareness that could help users to find their way, know what's on nearby with the opening hours, get location special offer, and receive "what to do next" recommendations. Information must come down to time, local conditions and proximity. It needs to be owned by the entire tourism supply community, including businesses and operators, destination management organizations, GTOs and other stakeholder groups. Airlines' apps should be synchronized to destination content. Provide

mobile guidebook with comprehensive local information, immediate / real time, and geographic-specific information. Airports should have interactive systems like the shopping centres so tourists could gather / download required information once they arrived, in the same way as they now distribute maps and local guides.

It is often difficult for tourists to find the right app for their interests, often in a foreign language. GTOs should talk about the best apps for their destination and encourage prospective travellers to download. Then users will tweet about them. GTO's should distribute all relevant and useful commercial apps and not only their own, if they would like travellers to have a rich experience.

3. Know your customer

Back to the fundamentals of "know your customer", provide brochures & coupons that meet their personalized needs, in real time. Recommender engines could list out best match information. "What is near" is a relative concept which varies among different people as distance is a relevant term. Destinations should allow travellers to filter information according to their preferences but allow for compensations also. Knowing individual's value of time and space before showing them "nearby" activities will be critical for creating value.

Post trip engagement

Tourism Australia suggested the 40/20/40 rule. Research by American Express that showed how much enjoyment in each phase of the purchase cycle. 40% enjoyment from pre-holiday / 20% enjoyment during holiday / 40% enjoyment after holiday. How much marketing budget does an organisation spend based on the 40/20/40 rule?

1. Personalized sharing

Invite tourists to upload decent photos onto the destination website to share their best moments with the others. Competitions and prizes can be used to achieve this, Magazification the UGC and share the experiences where others can see themselves doing. Enable tourists to send out electronic postcards via social media. Provide free customized e-book / e-album after they upload their trip photo so users can share both virtual and physically with their social circle. The e-book template must be easy to create and customize online. The UGC will not only inspires visitors but also let industry see what visitors like and provide the user perspective of the destination. Tailor the customer preferred platform (e.g. facebook? Pinterest?), and create easy pages for them to share to social media. Send a special "Thank you for coming" message to the tourist after their

trip finished and send anniversary reminders to refresh their memories about the destination. Provide incentives for sharing and for travel back to destination.

2. Engagement

Engage tourists to talk to other users and ask them for their opinions so that it is bread coated globally and accessible. Invite tourists to participate in competitions such as a photo competition, "be an ambassador", showing their blogs / e-book to the others. Invite them to special events that happen behind closed doors to encourage engagement. Get them in destination, undertake qualitative research and look beyond the print survey. Ongoing re-engagement - invite them to talk to others so that they become an advocate by working with them closely. Show them you care by responding to all comments and recommendations in UGC and social media.

3. Reward and incentivize

Lifting the profile of UGC and incentivizing users to communication with their friends by giving them discounts. E.g. if a visitor recommends a destination / reviews and then a friend books hotel/flight, they get a discount or reward. Why is "Crowd sourcing" not in use in tourism?

4. Education Tourism

Follow up for more travel study destination, investment (I'd love to live here, Australia lifestyle). Look beyond the idea of traditional visitors such as visiting academics, university alumni (via their social networks), influence conferencing market etc. Encourage international students to engage in destination as they have spent a lot of time at a destination so they have a lot of local knowledge.

Conclusions

Destinations need to be proactive and reactive in using the range of emerging technological capabilities to engage with consumers before, during, after their trip. They need to coordinate the tourism supply and create clusters that address specific themes and engage consumers in the delivery and cocreation of value. There is a huge range of opportunities and challenges ahead and technology enable strategic marketing agility will be rewarded in destination management organizations globally.

6 Niche factors

Within the benchmark, a variety of criteria has been analysed and best practice examples have been identified. On average the top 10 destinations considering use of technologies and online presence are Thailand, Montreal, Las Vegas, Vancouver, Hong Kong, Puerto Rico, Australia, Norway, UK and Melbourne. These could be used as examples for best practice utilisation of technologies and applications for all destinations.

However, there are a number of criteria that no destination in the benchmark has integrated. These can be considered niche factors that destinations can implement into their websites in order to improve the quality and sustain the future success by making use of the latest technologies.

These niche factors include:

- Audio sounds
- Features for people with audio impairment
- treasure hunt
- augmented reality applications
- context based services
- gamification
- personalisation and customisation of website possible
- help line in destination (phone or Skype)
- Loyalty programme

In general, the current level of the destinations' use of technologies needs to be improved in order to maintain the standard. Most destinations are still underutilising what is available by implementing only a fraction of the technological tools available. Destinations have to reconsider and plan their future use of technologies taking into consideration that there are also a number of technologies and applications that will become increasingly important in the future. The best online destination management organisations worldwide will make full use of the opportunities of the ground-breaking technologies that are available such as:

- ✓ Augmented and virtual reality
- ✓ Real-time marketing
- ✓ SoLoMo marketing
 - social media based marketing
 - location based marketing
 - mobile marketing
- ✓ Clever destination

7 Recommendations for Australia

Australia's performance as an online destination is well above average and can be considered a best practice example for a variety of factors. Nevertheless, it is still underutilising the technologies and applications that are available in order to inspire, inform, promote, facilitate, engage and share with potential travellers, particularly after travellers have arrived to the destination. New ideas and the utilisation of different technologies and applications that come together as a whole could really help improve the online presence of destinations.

Lessons for Australia therefore consist of creating an increase in the interactivity within the website and bringing together a variety of tools such as transport, trip and itinerary planners in order to create one stop shops for consumers. Through the growing importance of social media, online destinations really need to implement news feeds and integrate their social media channels in the website. In addition, virtual reality applications such as 360 degree tours, virtual tours through the destination or webcams can really increase the transparency of the tourism product.

8 Conclusion

In conclusion, Australia is doing well in the benchmark but is still underutilising the technologies and applications available for eTourism to full capacity. Alongside with other destinations, all Australian destinations should consider the opportunities of niche factors that could be implemented as well as the future technologies and applications. Constant monitoring of their ranking within the benchmark is necessary along with continuous benchmarking of other online destinations. By taking into consideration the recommendations mentioned above, all Australian destinations can further improve their online presence and sustain their future competitiveness.