*Nina Mistilis Corresponding author
Australian School of Business University of New South Wales, Australia
n.mistilis@unsw.edu.au

Dimitrios Buhalis
School of Tourism Bournemouth University, United Kingdom
dbuhalis@bournemouth.ac.uk

Ulrike Gretzel
Institute for Innovation in Business and Social ResearchUniversity of Wollongong, Australia
ugretzel@uow.edu.au

Future eDestination Marketing: Perspective of an Australian Tourism Stakeholder Network

Abstract

Tourism destinations are difficult to manage due to the complex relationships of their diverse public and private stakeholders. At the same time strategic marketing efforts are important for destinations to foster positive consequences of tourism, particularly given the range of opportunities and challenges created by the emergence of social media that destinations can use advantageously. This paper aims to explore future eDestination marketing from Australian tourism stakeholder network perspectives. Workshops were convened in July 2012 in Melbourne, Australia, for select stakeholders invited to contribute to the futures national tourism technology strategy. They presented a stakeholder network approach to futures strategy development which aims to contribute to that used in recent national tourism plans and strategies for Australia developed by government. Building on theories of stakeholder networks and futures, the paper demonstrates the value of a futures stakeholder network method compared to traditional government approaches by critically analyzing outcomes of both.

Keywords: futures; stakeholder network; digital tourism; destination marketing; strategy development

INTRODUCTION

With the widespread diffusion of the Internet, destination marketing has changed from passive to active promotion, from one-way to interactive marketing and from collateral material to user generated contents. New technologies, rapid changes in the business environment, industry markets and structures and consumer needs continue to challenge tourism destination organizations in fundamental ways (Gretzel, Yuan and Fesenmaier 2000). In this environment, destinations need a workable, responsive process to harness state of the art skills and knowledge in order to envisage the future, to develop clear pathways to meet the changes and to move to swift and appropriate implementation (Buhalis and Wagner 2013).

Tourism destinations are multi faceted and are typically challenged by 'the interdependence of the multiple stakeholders, the fragmented resources, and an almost complete lack of hierarchy and authority … '(Lemmetyinen and Go 2009:31). Due to the complexity of the relationships of their diverse public and private stakeholders, they are some of the most difficult entities to manage and market (Buhalis 2000; Sautter and Leisen 1999). Inclusion of stakeholders, then, is particularly important for destination planning and management as well as strategic and coordinated marketing efforts to ensure that institutional strategies 'converge towards the same goals' (d'Angella and Go 2009:432).

Different approaches exist to derive useful descriptions of possible tourism futures. Some futures based literature in tourism analyzed various drivers – economic, demographic, technical and other – to construct a vision of tourism (Dwyer, Edwards, Mistilis, Roman and Scott, 2009; Yeoman, Rebecca, Mars and Wouters, 2012). Other futures based literature explored strategic destination planning for tourism through scenario thinking (Formica and Kothari, 2008). It

applied a method with a three phased workshop namely the Prior phase – invited experts determined future forces which could drive proactive tourism planning and strategy development; the During phase- industry leaders explored future trends in think tanks and the After phase – a report was generated based on these outcomes. Although the task of these workshops was construction of a future for several specific localities, concomitantly they facilitated a valuable long-term outlook from multiple perspectives. They also generated 'multiple future scenarios that will affect the tourism industry in U.S. urban destinations' (2008, p366), suggesting that industry involvement in the form of workshops is a valid approach to deriving useful and strategic visions of tourism futures.

The importance of engagement in collective futuring for tourism was also shown by Gretzel, Fesenmaier, Formica and O'Leary (2006) who used a group of Destination Managers to envision the future and make decisions about what strategic approaches to adopt for marketing destinations in the United States of America, following the September 11 2001 terrorist attacks. The outcome was a manifesto for change that was not only comprehensive but also innovative and so fundamental in nature that its premises still hold true, more than ten years later and despite numerous technological changes that have occurred since. However, the approach was limited in that it only took into consideration the destination marketing organization (DMO) perspective and neglected to obtain input from various other stakeholders.

More recent literature (Rowley 1997; Neville and Menguc 2006; Garriga 2009) and practice suggests that stakeholders can form a network and collaborate around an organization to express their expert views and make decisions collectively for particular topics/ issues/ challenges. It could be argued that the specific context presented in this paper validates inclusion of a network of key stakeholders for futures envisioning informing strategic management and marketing

decisions. This approach arguably provides a responsive process and is particularly relevant in developing any strategy for technology and tourism, given the immediacy of the challenges.

The Australian government adopted a traditional approach of consultation with industry to develop a Strategy and to implement a Committee of government representatives which commissioned business consultant reports to illuminate the way ahead for select agenda items. By 2012 this process had stalled and needed updating from the online policy formulated almost a decade earlier. Confronted by evolving technology and usage, changing visitor information preferences and the need to at least maintain destination competitiveness, the process needed a more responsive, inclusive approach from a wider forum of public and private stakeholders in a form suitable for supporting creative thinking and discussion.

Building on theories of stakeholder networks and collective futuring and incorporating global destination benchmarking, the goal of this paper is to demonstrate the role and value of developing future tourism strategy in Australia using a stakeholder network approach compared to a traditional government approach; in doing so it also presents technology strategies for eDestination marketing resulting from the joint brainstorming activities of a stakeholder network. The paper is set out as follows – after establishing the ontological setting, it reviews stakeholder network and futures literature, then analyses the historical approach of the Australian government to developing tourism and technology strategy; it sets out the method of the stakeholder network approach and it critically analyses the outcomes of both approaches and presents strategic implications for digital tourism in Australia. Finally it describes futures for developing national e-tourism strategy driven by stakeholder networks and futures models of e-tourism.

ONTOLOGICAL SETTING

In spite of the continuing growth and structural change of tourism 'futurists have paid so little attention to the topic' (Cole and Razak 2009 p 338). This means that approaches suitable for entire destinations are not discussed in the literature. It was therefore necessary for the purposes of the research presented in this paper to select a futuring approach from the many existing ones and adapt it to the tourism destination context. Futuring techniques have been classified in many ways, mostly based on epistemological or normative considerations (Amer, Daim and Jetter 2013; Morgan 2011; Aligicia 2003; Hove 2003). In contrast, Bergman, Karlsson and Axelsson (2010) propose a classification from an ontological perspective. They present a matrix with two dimensions: 1. Whether truth claims are made; and, 2. Whether explanatory claims are made. The approach presented here falls into the category of Prediction according to their categorization, making both truth and explanatory claims.

Thus, this paper looks at futuring that makes claims regarding *what type of future* is likely, and describes the process by which to successfully anticipating and addressing it. Bergman, Karlsson and Axelsson (2010) postulate that predictions 'usually have scientific ambitions and are more precise than in the other outcomes, as they indicate mechanisms and tendencies behind the events and states' (2010, p 859). The futuring described in the paper involved experts from industry and academia and exposed participants to findings of academic research in the course of the futuring process. This underpins the prediction type of forecast noted above being scientific and precise. It further proposes a type of futuring that Floyd (2008) refers to as systems methodology. It fulfills the criteria of recognizing the value of intersubjective and interobjective knowledge; inclusion of participants within the boundaries of the system under consideration; creating future-oriented knowledge suitable for assisting decision making, creating shared

understanding and developing awareness in relation to complex problems involving multiple

perspectives, without repressing the perspectives of any participants/stakeholders in the process;

acknowledging that the system itself is seen differently by different stakeholders; and, creating

the potential for transformation of the system as part of the navigation towards the future.

STAKEHOLDER ENGAGEMENT AND NETWORKS

Over the past several decades there has been a growing body of tourism research on stakeholder engagement building on general management theory (Hall 1999). The notion of stakeholders has developed and become entrenched in organizational business literature and practice since the seminal work of Freeman (1984). He defined stakeholders as 'any group or individual who can affect or is affected by the achievement of the organization's objectives' (1984, p. 46). In stakeholder theory, wider interests than those of shareholders are considered by organizations in formulating decisions, namely those of their stakeholders. Strategies for the inclusion of stakeholder interests are generally known as 'stakeholder management' and can be implemented in a wide variety of ways (Jarrod et al. 2012); for example, organizations may consult with stakeholders occasionally to gain an understanding of their interests or may engage them to a greater extent by their integration into the decision-making structures. They can also assemble disparate unlinked stakeholders unknown to each other as described below (Garage 2009).

There appears to be a different focus of topics in the management versus tourism literature. Most stakeholder theory topics in the management literature pose questions for organizations in the private and to a lesser extent the public sector. Some examples are stakeholder integration into decision making (Jarrod, Fall, Leaks and Reid 2012), the nature of the relationship between the organization and stakeholders or between stakeholders (Sundaram and Inkpen 2004), stakeholder attributes (Mitchell, Agle and Wood 1997; Jones and Wicks 1999; Tkaczynski, Rundle-Thiele and Beaumont 2009; Garcia, Gomez and Molina 2012) and the organization's analysis of its stakeholders (Sauter and Leisen 1999; Sheehan and Ritchie 2005).

The focus in the tourism literature is clearly on the public sector. There is an extensive analysis of stakeholder management in the general tourism planning literature and in that for sustainable tourism (Hall 1999; Sautter and Leisen 1999; Caffyn and Jobbins 2003; Wray 2011; Waligo, Clarke and Hawkins 2012). However in the context of destination marketing, this is less the case. Examples address stakeholder management to support destination marketing (Buhalis 2000), technology developments and distribution systems (Buhalis and Licata, 2002), branding models (Morgan, Pritchard and Piggot 2003), and public/private sector partnerships in electronic national destination management systems (Mistilis and Daniele 2004) and collaborative tourism marketing (d'Angella and Go 2009). Later stakeholder destination research has included key drivers affecting tourism 2020 (Dwyer, Edwards, Mistilis, Roman and Scott 2009), tourism regional inter organizational relationships (March and Wilkinson 2009), regional land uses (Paracchinia, Pacinib, Jones and Pérez-Sobad 2011) and power in stakeholder groups/actor networks (Beritelli and Laesser 2011). Whilst most of these limit stakeholder discussion to local, city, regional or national destinations, there has been slight focus on international tourism strategy for example ASEAN intergovernmental collaboration (Wong, Mistilis and Dwyer 2011). There appears to be little research on stakeholder involvement in tourism and technology destination strategy; one exception (McCabe, Sharples and Foster 2012) is discussed in the next section.

Networks have the capacity to shape the dynamics and evolution of business through their impacts on innovation (Scott, Baggio, Cooper, 2008). They help maintain a competitive advantage and facilitate knowledge transfer processes (Hjalager, 2010). They are invaluable to individual organizations conducting business in the contemporary environment (Dale 2003;

Grangsjo and Gummesson 2006). Increasingly, networks have superseded the mainstream notion of organizations as individual, autonomous economic entities, as they represent a total economic unit and an association of business value creation. In other words, the organization's environment is no longer seen as a 'hub and spoke' but as a network (Garriga 2009). Additionally, destination networks also provide significant positive value for driving innovation (Buhalis 2000; Zach and Racherla 2011).

Most stakeholder theory to date posits a dyadic inter-organizational relationship between the stakeholder and the organization or amongst stakeholders. This does not recognize the complex, networked structure of the organization – stakeholder relationships (Garriga 2009). Networks are important to consider when analyzing such behavior as organizations do not simply respond to each stakeholder individually but rather to an *interaction* of multiple influences from all their stakeholders (Neville and Menguc 2006).

Although few studies have researched stakeholder networks, the notion of a single collaborative stakeholder network surrounding the organization has gained currency recently. This is based on stakeholders' shared views of and interests in the organization. These stakeholders inform and are informed within the network; they present an approach to the organization based on that collaboration. Gray and Wood (1991 p146) quoted in Garriga (2009 p624) defined inter-organizational collaboration in stakeholder theory as 'when a group of autonomous stakeholders of a problem domain engage in an interactive process using shared rules, norms, and structures, to act or decide to act on issues related to that domain'.

Rowley (1997) introduced to the analysis social network constructs to measure the structure of stakeholder networks, in respect of density (interconnectivity) and centrality (node position).

With this he built a theory of stakeholder influences, incorporating multiple, interdependent stakeholder demands and predicted how organizations respond to simultaneous influence of multiple stakeholders. In contrast to the traditional stakeholder dyadic inter-organizational relationship noted above, for stakeholder networks there are direct inter-stakeholder relationships which can affect their behavior and that of the focus organization. McCabe, Sharples and Foster (2012) also noted that theories of collaboration for tourism have embraced the 'network' approach. They examined stakeholder engagement for designing technology enhanced tourism services and showed the importance of stakeholder collaboration in the context of product innovation.

Garriga (2009) analyzed collaborative process surrounding the 'Gas-Nat' company and its stakeholders cooperating on the natural gas pipeline program in Argentina by considering the network data to describe the role of the firm in these cooperation processes. Factors enabling cooperation processes include political opportunity structure and the degree of interconnectedness of the stakeholders. The role of the firm in such a process was named the *tertius iungens* that is a 'bringing together' (2009, p 633) of previously unconnected stakeholders. She also found that 'cooperative action in stakeholder network is likely to be a function not only of the network but also of strategic orientation of the stakeholder'. This *tertius iungens* approach is particularly applicable to any tourism strategy process, given the complexity of its stakeholders mentioned earlier.

STAKEHOLDERS AND FUTURES RESEARCH

The importance of stakeholders in identifying futures is well recognized in the wider literature for various types of approaches. For example Van Notten, Rotmans, van Asselt and Rothman (2003) suggested a broadly shared scenario typology to provide a common understanding of the typical features of scenario development. They suggested that 'expert input is more and more complemented by stakeholder-input in today's scenario projects' (2003, p432). Quist and Vergragt (2006) found that in terms of backcasting there was a 'shift' to broad stakeholder participation. Stakeholders are very important in 'participative backcasting' for planning, (Carlsson-Kanyama, Dreborg, Moll and Padovan 2008) and in visionary and problem-solving activities. However not all approaches held through stakeholder workshops are optimal as 'refinement of the participative process' may be needed to improve the quality of results (2008 p44). For example participants with 'varied backgrounds, expertise and value orientations' (2008, p44) could be recruited and more innovative approaches used to 'liberate' their minds.

The approach of participatory knowledge production is well established. For Hage, Leroy and Petersen (2010) wide stakeholder participation may enhance legitimacy and the quality of decision-making in the process. They also suggest that the core business of a relevant government agency was to produce and integrate scientifically robust and policy-relevant knowledge.

Scenarios using participative scenario development workshops may be applied in a multi-organizational context to address issues of mutual importance; they focus on achieving outcomes and stimulating debate and discussion amongst key stakeholders (Soetanto 2011). Here scenario building aims to engage stakeholders and a more psychological benefit is that whilst discussing

the future, they are appreciating the interconnectivities of related issues and the collective

implications of their choices (Goodier, Austin, Soetanto and Dainty, 2010). Another approach

with multi-organizational contexts was revealed in a method application to construct integrated

scenario-episodes in order to investigate multi-stakeholder interactions (Sircar, Sage, Goodier,

Fussey and Dainty, 2013). Here the set of integrated scenario-episodes was designed to engage

many key stakeholders across various industry sectors and gain successful outcomes.

Whilst the literature is full of examples of stakeholder participation in various types of

approaches, surprisingly it does not appear to include stakeholder networks. Most of the articles

appear to focus on stakeholder participation as individuals experts (Smith, Vesga, Cadena,

Boman, Larsen and Dyner 2005) or members of the local community (Carlsson-Kanyama,

Dreborg, Moll, and Padovan 2008) or as organizational representatives (Sircar, Sage, Goodier,

Fussey and Dainty 2013); none appears to discuss the value or involvement of stakeholder

networks in futures development, even though the literature on stakeholder networks is quite

advanced.

HISTORICAL APPROACH OF THE AUSTRALIAN GOVERNMENT

There has been a succession of national tourism plans and strategies for Australia over the last several decades. They have tended to consult widely with Australian industry and state and territory governments to develop strategy and a Committee of government members to implement it supported by commissioned business consultant reports. The challenges with this approach are twofold. First key stakeholders may not volunteer to participate and therefore the breadth and depth of the strategy may be compromised. Second the topics raised may be more immediate and operational, not inclusive of analyses of trends (apart from economic and visitor arrival numbers) which underpin a vision or any futuring. In terms of an online or digital focus, the previous strategy (Australian Government, 2003) evolved from two Government Papers based on wide consultations with industry and interest groups across Australia. It focused on demand side issues and sought individual organizational input. Although there were no expert panels or key expert stakeholder workshops, it noted that 'Adopting and building on the use of enabling technologies is also crucial for most tourism businesses' (2003, p24). Its focus for an e-strategy rested on improving online capability of small tourism businesses; it mentioned eDestination Marketing only in reference to The Australian Tourist Commission's website australia.com.

The current Australian tourism strategy is based on the Jackson report (Australian Government 2009a). Its Steering Committee consisted of high level executives from tourism industry associations, state government, the private sector and, including the Chair, the wider business community; it 'conducted wide-ranging consultations with industry and government participants around Australia' (p2). There were well attended tourism public meetings in all major cities and

separate private meetings with government officials, though again there were no invited expert panels of industry or academia key expert stakeholder workshops. Of its ten recommendations, one focused on SMEs' online capability, advising to 'Urgently support the acceleration of the online capability of the Australian tourism product, working with State and Territory Tourism Organizations to fund programs that expand cost-effective digital platforms for distribution and bookings and accelerate SMEs' uptake'(2009a, p5). Whilst of critical importance, its narrow focus omitted the destination represented through destination marketing organizations as an integral part of any tourism and technology strategy.

From this report the current strategy, the National Long Term Tourism Strategy (NLTTS; Australian Government 2009b), was derived and launched in 2009. It outlined the policy framework to assist industry in achieving its vision to 'continue to provide visitors with unique and unforgettable experiences' (2009b, p3). There was no action item for the Jackson report's online capability recommendation, though one action item nominates 'online distribution' as a broader part of Tourism Australia's capacity and functions (2009, p5-6). Nevertheless one of nine Working Groups established to facilitate implementation of the Strategy action items was the Digital Distribution Working Group (DDWG) which undertook further development of the Jackson report's digital strategy recommendation.

The DDWG consists of representatives from state and national governments and one industry association. However, no industry or academic experts are included and there has been no consultation with stakeholders who have particular knowledge, skills and expertise, for example academics and industry experts working in the areas of technology applications and usage. It 'aims to increase the online capability of the Australian tourism industry and to encourage

greater uptake by small and medium size tourism enterprises of online distribution systems'
(Australian Government, 2011b, p14). It recently broadcast its key achievements (Australian
Government 2012d) as including development of the National Online Strategy for Tourism
(NOST), the Going Global Action Plan and the Tourism Operators Online Benchmarking Survey
(respectively Australian Government 2011; Australian Government 2010b; Australian
Government 2010a). These reports described below were commissioned from various business
consultancies and continued the approach of a lack of expert stakeholder involvement.

The NOST purpose is to increase the online distribution and global visibility of Australia's
tourism product. It provided a plan for the digital enablement of the tourism industry in Australia
to enable its excellence in the promotion and distribution of tourism product online (Australian
Government 2011 p 3); the various key themes include one for digital distribution. The Going
Global Action Plan was a commissioned guide to provide practical support to tourism operators
in adapting to the changing environment of tourism digital distribution using new technologies
(Australian Government 2010b). It supplemented this by engaging the Australian Tourism Data
Warehouse (ATDW) to develop further its Tourism e-kit (ATDW 2012) which 'incorporates a
series of easy to consume tutorials that equips tourism operators with effective knowledge about
online marketing (2012, p. 2). The e-kit is well regarded according to feedback from tourism
operators and has 300,000 downloads since its inception (L. Ward, ATDW CEO, personal
communication 13 January 2013).

To establish through quantitative research the extent and level of online presence and capabilities
across the tourism industry in Australia as well as barriers or reasons for non implementation, the
Tourism Operators Online Benchmarking Survey (Australian Government, 2010a) was
commissioned in late 2010. However, its primary sample was based on listings of the ATDW

which are not representative of the Australian tourism industry population. In general, these reports continued the government's traditional approach and focus and were used as a basis for actioning implementation.

Several weaknesses were acknowledged in the 2011 NLTTS progress report including industry perception that the process was government-focused and that it lacked their engagement recently, that is since the Jackson Report and NLTS released in 2009 (Australian Government 2011b). Government to its credit recognized these weaknesses and addressed them by producing the *Tourism 2020* report, which updated the NLLTS in response to ongoing challenges and emerging opportunities. It created a policy framework to 'support industry growth and provide industry with the tools to compete more effectively in the global economy…' (Australian Government 2011c). It heralded commencement of procurement for the development of a Knowledge Base and Online Community in the 2012 Progress Report (Australian Government 2012b). This will create an online community of industry professionals wishing to share their knowledge and ideas regarding the NOST: it may well constitute a good step in the direction of key stakeholder involvement.

In sum, over the last decade, the method used by Australian government was less inclusive. There was initial consultation with industry and state and territory governments to identify broad trends and needs for development, followed by Government Committee work supported by general business consultancy reports to develop individual implementation areas. Whilst there clearly have been significant achievements in addressing tourism SME online capability, such as the well regarded educative Tourism e-kit, the outcomes of this process have two publicly

acknowledged weaknesses, first in perception of its being a government process and second in omission of industry engagement. Industry feels alienated from the process and there are gaps in the agendas, perhaps due to absence of engaging experts in the process of policy development, for example with stakeholder network involvement. A third weakness is reliance on consultant reports which may be of little value as a basis for implementation policy and a fourth weakness is the lack of involvement of experts - for example in the technology industry or academia - and some key stakeholders. Finally the lack of engagement at the local destination level failed to provide any focus on the destination and its stakeholder network, as opposed to enterprises, and consequently insight into challenges such as of eDestination Marketing. (See Table 1 which summarizes the outcomes of these government strategies.)

The Australian vision of digital capability therefore needs to be inclusive of all views and expert advice possible to address the challenging future. The approach and policy threads are woven through the fabric of the various strategies, committees and reports – initial industry consultation determining a focus on SMEs and on improvement of their online capability, followed by implementation by government committee with consultant reports to illuminate the way ahead. There needs to be more strategic focus on eDestination marketing as research suggests that marketing local tourism destinations has grown more, not less, complex in the digital age and that in both the United States and Australia, destinations have not yet adequately responded to these challenges (Yuan, Gretzel, and Fesenmaier 2003; D'Ambra and Mistilis 2010).

TABLE 1 HERE

METHOD

The idea of a stakeholder network approach to envision the digital future of tourism in Australia emerged within the International Federation for Information Technology and Travel & Tourism (IFITT) Australasia Board. IFITT is a community of both academic and industry experts dedicated to the advancement of technology in the area of travel and tourism. As such, it represents an important forum for stakeholders; however, its presence is generally much stronger in Europe than in Australia. The board member who had developed the idea of bringing together a stakeholder network initiated discussions with the Department of Tourism to obtain buy-in. The Department agreed to the idea of organizing a stakeholder network forum in partnership with the ATDW. The ATDW is the national platform for digital tourism information on Australia and is a central storage and distribution facility for Australian tourism products and destinations. It was created in 2001 as a joint initiative of the government tourism organizations from all Australian States and Territories and from Tourism Australia, the national tourism destination marketing organization. ATDW is therefore a central player within the Australian tourism industry and has a strong interest in increasing Australian tourism's digital presence.

The main workshop was convened July 12, 2012 in a meeting room in Downtown Melbourne, Victoria, a location that was deemed accessible for a majority of stakeholders. The purpose was to engage the stakeholder network in brainstorming on strategic developments needed for tourism in Australia to effectively operate as a network in the digital space. The workshop was preceded by an academic input meeting July 11th at Victoria University in Melbourne and was followed up with another academic meeting for feedback July 20th at the University of Queensland in Brisbane. The workshop started at 10:30 in the morning and ended at 5pm, only interrupted by short coffee breaks and lunch, and was followed by an informal networking

opportunity to allow for debriefing with the stakeholders. The goal of the meeting was communicated to the stakeholders as "developing a tourism and technology strategy for tourism destinations in Australia". The workshop was moderated by a member of the IFITT international board. Another international board member helped in facilitating the discussions. A dedicated scribe was responsible for taking notes and collecting all written materials produced by the participants.

The workshop was designed as a forum for discussion with small break-out groups to facilitate brainstorming activities and joint reflection sessions. Break-out groups were given post-it notes for idea generation and were asked to nominate someone to report the results to the wider group. The break-out sessions were structured around the three main phases of travel: pre-trip, during trip and post-trip. The moderator presented the entire group with international benchmarks and best practice for each of the phases based on an online evaluation of international tourism destination websites to facilitate the discussions and to stimulate the debate and contextualization of international best practice to Australia.

Careful attention was given to the selection of the participants, both in terms of the invitation process and the identification of important stakeholders. The prevailing organization of the stakeholder network is the Australian Government Department of Tourism, which has ongoing responsibility for policy developing the National Online Strategy. However, the bringing together of the stakeholder network was facilitated by IFITT and ATDW. Key players in the Australian tourism and technology field were invited by ATDW and the Australasian IFITT Board to attend the workshop in order to develop a way forward for the tourism national strategy in information and communication technology for Australia as a tourism destination. The effort resulted in 39 stakeholders attending the workshop. They represent government destination

marketing organizations (at the national, regional and local level); industry (including

associations, services, tour operators, IT, consultancies, research and finance businesses), and

academia (university and other educational institutions). The split was 15 government, 14

industry, and 10 academia, suggesting that all three groups had somewhat equal representation.

The moderator made sure that the breakout groups included a good mix of all three types of

stakeholders. Stakeholders may engage in predatory or symbiotic relationships (Fennell and

Butler 2003). There was no evidence of predatory behavior during the workshop. In fact, there

was a general sense of "sitting in the same boat" and needing a collaborative approach to resolve

the issue that permeated all workshop discussions. Discussing best international practice focused

people to the future challenges and enabled them to disregard political and administrative

agendas.

The analysis is based on two sets of data: 1) documents relating to the Australian government's

efforts in the area of IT and tourism; and, 2) a summary that consolidated all the notes obtained

during the workshop as well as the feedback received during the entire process. The comparative

analysis focused on differences in the outcomes of both approaches.

STRATEGIES IN eDESTINATION MARKETING IN AUSTRALIA: MODELS OF THE FUTURE e-TOURISM DESTINATION

Having discussed international best practice and how Australia at a national, state and big city level performs against benchmarks, a lively discussion by all stakeholders resulted in identification of key requirements. As the conversation was directed to how Australia as a whole can perform better against international competitors, political and administrative agendas were dropped in favor of a longer term strategic vision. The workshops demonstrated a range of issues that participants felt are critical for the Destination Australia e-strategy. The results were categorized into strategy according to three stages of the visitor itinerary namely:

- Before the trip (use technology to dream, inspire and to inform),
- During the trip (use technology to engage visitors and enhance experience in real time) and
- Post trip (use technology to engage /maintain engagement of visitors and encourage user generated content to stimulate new travelers) (see Tables 2-4).

Tourism Australia suggested a strategic aim of the 40/20/40 rule, reporting research by American Express which showed how much enjoyment there was in each phase of the purchase cycle, namely 40% enjoyment from pre-holiday, 20% enjoyment during the holiday and 40% enjoyment after the holiday. In analyzing if these proportions are applicable, the question posed was how much marketing budget an organization spends on the three different phases.

By way of note, Australia and most destinations around the world typically focus on pre-trip campaigns, neglecting in-trip and post-trip opportunities so this categorization itself represents an innovative approach.

In terms of the outcomes for the 'use technology to inspire' part of the 'Before the trip' stage of the itinerary '- there were five sub categories. First there was a strong plea to destinations that Images & Videos must be integrated into a comprehensive message to reinforce the destination brand and display a coherent image. And second that information sharing by intending visitors must be actively supported for example by Social Media and destination systems with email and share buttons. Third the point was made that personalization of information and images allows destinations to know their visitors as individuals and groups which in turn are valuable inputs for destinations to plan, manage and market. For example the Tourism Australia Facebook page has 3.2 million followers, containing a wealth of information to harvest. There was also much discussion around how perhaps public sector organizations could support tourism operators to develop their online capability, ultimately increasing conversion and yield for the entire destination. Fourth regarding interactive platform management -analysis requires application to all digital platforms of government tourism organizations, not just destination websites. If they allow user engagement, they must be open, adaptable, available and able to track who, when and what activities occur. Tracking these channels enables destinations to identify valued hidden or iconic items with accidental insights and develop niche markets. They can provide travel planning tools such as mobile maps. Fifth, gamification is a new method to develop inspiring and engaging content online as it invites users to engage in information exploration and 'get connected' to the destination.

There were two parts in the 'Use technology to inform people' section, first regarding the provision of maps –which are critical for informing people and organizing experiences: users can rate content and build their itinerary at the same time, preferably using Geo locating activities and attractions which are critical for building itineraries. Second regarding Itinerary

and Dynamic Packaging the discussion focused on how visitors may engage with locals or fellow travelers facilitated by social media platforms such as WAYN and Tripadvisor; there was also discussion on pull information - QR codes and Apps like "Tripit" - and how technology could consolidate information. See Table 2 for a more detailed listing of outcomes.

TABLE 2 HERE

In terms of the outcomes for the 'During the trip' stage of the itinerary there were three sub categories in use of technology to engage. It was suggested that a more hands on approach and a greater proactive engagement of visitors are required using innovative technologies and that Government destination organizations need to be proactive in engaging with visitors at the destination. Real time services will emerge rapidly as visitors require information, advice, assistance and recommendations relevant at that particular minute. The facilitator strongly emphasized that future destination marketers will manage the @destination or @brand twitter account and be responsible for visitor interactivity through Connectivity, Social-Local-Mobile (SoLoMo) Marketing and Know your Customer. Stakeholders were encouraged to nominate elements which contribute to the entire system in order to enhance the tourism experience of visitors in a comprehensive way. Connectivity is critical for visitors and to facilitate engagement, destinations need to support effective and efficient connectivity, for example with cheap or free Wifi for visitors and reduced mobile phone roaming costs. An example is Geelong, a regional city in south east Australia which will soon convert security cameras into free WiFi spots. The comments related to these aspects also made it clear that telecommunications companies are important players to include in the stakeholder network.

Second Social-Location-Mobile (SoLoMo) Marketing occurs when information is contextualized and owned by the entire tourism supply community. SoLoMo is an emerging major tool for innovative destination marketing referring to a mobile-centric version of the addition of local entries to search engine results, as a result of the growing popularity of smart phones and provides greater local precision to search engine results than those via a PC. Standardised sets of hashtags allow apps to push out information to twitter; QR codes and Near Field Communication (NFC) can also lead people to specific sites that provide context based services; mobile apps could broadcast information to visitors. For example Travel Siri has Geo awareness that could help visitors know 'what's on' nearby, get location special offers and receive 'what to do next' recommendations. Third, it was important to 'Know your visitor' and any strategy should include the fundamentals and provide brochures and coupons to meet personalized needs, in real time. See Table 3 for more detailed listing of outcomes.

TABLE 3 HERE

In terms of outcomes for the 'Post trip engagement - Use technology to maintain engagement' stage of the itinerary three groupings were discussed, namely personalized sharing where visitors share their destination experiences with their social circle and beyond, enabling their sending out electronic postcards via social media through providing free, easily created, customized e-books / e-albums for their trip photos. Second Engagement was discussed where visitors become advocates and ambassadors for the destination by talking to other users and asking their opinions – but destinations must respond to all comments. Third Education Tourism was identified as critical for a future-oriented strategy which must cast a wider net by looking beyond the idea of traditional visitors to visiting academics, university alumni (via their social networks). See Table 4 for more detailed listing of outcomes.

TABLE 4 HERE

The benchmarking results discussed during the stakeholder network workshop showed that Australia's performance as an online destination appears to be above average and may be considered as best practice example for various factors (Buhalis and Wagner, 2013). However, like most destinations around the worldit is still under utilizing available technologies and applications which inspire, inform, promote, facilitate, engage and share with actual and potential visitors, before, after and particularly during the trip. The stakeholders were able to discuss how they combine new ideas and use different technologies and applications to improve the destination's online presence. Lessons for Australian destinations 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 visitors. 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 can really increase the transparency of the tourism product.

The eDestinations of the future will need to coordinate the tourism supply side and engage consumers in the delivery and co-creation of value. For the future, Australian eDestinations will need to be proactive and reactive in using the range of emerging technological capabilities to engage with visitors before, during, after their trip. They need to coordinate tourism supply and create clusters that address specific themes and engage consumers in delivery and co creation of value. There are many future opportunities and challenges: technology enabling strategic marketing agility will be rewarded in destination management for all organizations globally.

The workshop methodology drove wide ranging outcomes which appear to reflect the diversity of expertise of the stakeholder network members harnessed in a very productive way through the interaction. It also showed a complex combination of innovation, new technologies and new applications of them - in short a glimpse of eDestination Marketing for the future. This destination focus is fundamentally important to any eStrategy for tourism and a comprehensive future eDestination strategy will be critical of Australia as a tourism destination.

FUTURES STAKEHOLDERS NETWORK

The workshop methodology complements previous government approaches used for Australia over the last decade and enables more stakeholder engagement. As technology increasingly requires the amalgamation of information, experiences and products towards contextualized offerings this approach will enable the tourism industry to work in harmony and develop its competitiveness, The outcomes for the workshop show a great deal of eTourism futuring and innovation and government is required to take a leadership role in coordinating all efforts from stakeholders.

The outcomes of the government approach appear to reflect a focus on a supportive or educational role to increase tourism SME e-capability. It further needs to position the eCapability to a vision of the future. A futures stakeholder network workshop focusing on the e-tourism SME could also provide input into the process making it more inclusive.

 What is need for a more prescient strategy is some combination of the two approaches. If as Hage, Leroy and Petersen (2010) suggested, the core business of the relevant government agency was to produce and integrate scientifically robust and policy-relevant knowledge, then the question of knowledge and process ownership is raised. The Australian and indeed any Department of Tourism needs to function as a catalyst for bringing together all stakeholder networks and disseminate eKnowledge and support the coordination of the entire network using agile and adaptable technologies. The government should take on a coordinating role, assigning strategy to their stakeholder networks and supporting the coherent engagement with its publics at large.

CONCLUSIONS

A successful digital strategy is absolutely critical for Australia's future as a tourism destination; therefore, a more inclusive approach that allows for successful strategy development is extremely important. The workshop outcomes demonstrated that the expertise for futuring digital strategy is present in Australia and needs to be harnessed in a productive way. Perhaps the Australian Government could redefine its role in strategy development as that of *tertius iungens* - uniting disconnected key stakeholders into networks which could enhance the process, that is assuming a coordinating role. The tourism digital strategy needs mechanisms for futuring that allow new stakeholders to enter into and participate in the process at any time.

Stakeholder theory leaves open the question of 'how stakeholder management should best be implemented as an organizational strategy in a particular context' (Garrod et al. 2012:1160): organizations must engage in an on-going relationship with their stakeholder groups. The workshop was the first of its kind and provided valuable future strategic direction for Australia in one aspect of tourism and technology. How management of this futures stakeholder network is integrated into the Australian Department of Tourism strategy for tourism and technology is still unfolding and will to a significant degree determine the success of the future e-tourism Destination Australia.

REFERENCES

Amer, M., Daim, T. U., & Jetter, A. (2013). A review of scenario planning. *Futures*, 46: 23-40.

Australian Government (2003). *Tourism White Paper: A Medium to Long Term Strategy for Tourism* Commonwealth of Australia, Canberra.

Australian Government (2009a). *The Jackson Report On behalf of the Steering Committee Informing the National Long-Term Tourism Strategy*. Commonwealth of Australia, Canberra. Accessed 1 July 2012 at http://www.ret.gov.au/tourism/documents/tmc/jackson-report-july09.pdf

Australian Government (2009b). *National Long-Term Tourism Strategy*. Commonwealth of Australia, Canberra. Accessed 1 July 2012 at http://www.ret.gov.au/tourism/documents/tmc/dret%20tourism%20strategy.pdf

Australian Government (2010a). *Tourism Operators Online Capabilities Benchmark Survey 2010 Research Report*. Commonwealth of Australia, Canberra. Accessed 1 July 2012 at http://www.ret.gov.au/tourism/Documents/tmc/Digital%20Distribution%20Working%20Group%20-%20Benchmark%20Survey%202010.pdf

Australian Government (2010b). *Going Global an Action Plan to Adapt to the Changing Tourism Distribution Landscape.* Commonwealth of Australia, Canberra. Accessed 1 July 2012 at http://www.ret.gov.au/tourism/Documents/nltts/Going-Global-Action-Plan-Updated23Nov2011.pdf

Australian Government (2011a). *National Online Tourism Strategy*. Commonwealth of Australia, Canberra. Accessed 1 July 2012at http://www.ret.gov.au/tourism/Documents/nltts/NOST.pdf

Australian Government (2011b). National Long-Term Tourism Strategy(NLTTS) Progress

Report 2011. Commonwealth of Australia, Canberra. Accessed 1 July 2012 at

http://www.ret.gov.au/tourism/documents/nltts/2020/nltts-annual-report-dec11.pdf

Australian Government (2011c). Tourism 2020. Commonwealth of Australia, Canberra.

Accessed 1 July 2012 at http://www.ret.gov.au/tourism/Documents/nltts/2020/tourism-2020-

strategy.pdf

Australian Government (2012a). *Digital Distribution Working Group.* Commonwealth of

Australia, Canberra. Accessed 4 October 2012 at

http://www.ret.gov.au/tourism/policies/nltts/workinggrps/digital/Pages/default.aspx.

Australian Government (2012b). *Tourism 2020 Progress Report October 2012.* Commonwealth

of Australia, Canberra. Accessed 7 December 2012 at

http://www.ret.gov.au/tourism/Documents/nltts/2020/Tourism2020ProgressReport-Oct12.pdf

Australian Government (2012c). *Tourism 2020.* Commonwealth of Australia, Canberra.

Accessed 7 December 2012 at

http://www.ret.gov.au/tourism/policies/nltts/nltts/Pages/default.aspx#about

Australian Government (2012d). *Digital Distribution Working Group.* Commonwealth of

Australia, Canberra. Accessed 12 December 2012 at

http://www.ret.gov.au/tourism/policies/nltts/workinggrps/digital/Pages/default.aspx

Australian Tourism Data Warehouse (2012) Tourism e kit September 2012. Australian Tourism

Data Warehouse: Brisbane. Accessed 29 October 2012 at

http://www.atdw.com.au/tourismekit.aspx.

Bergman, A., Karlsson, J. C., & Axelsson, J. (2010). Truth claims and explanatory claims—An

ontological typology of futures studies. *Futures,* 42 (8): 857-865.

Buhalis, D., Licata, C. (2002) The future of eTourism intermediaries, Tourism Management, 23(3),: 207-220,

Buhalis, D. (2000) Marketing the competitive destination of the future, Tourism Management, 21(1): 97-116

Buhalis, D. and Law, R. (2008) Progress in tourism management: Twenty years on and 10 years after the internet: The state of eTourism research, Tourism Management, 29(4): 609–623.

Buhalis, D., and Wagner, R. (2013) E-destinations: Global best practice in tourism technologies and applications. in Cantoni., L., Xiang, Z.,, (eds), ENTER 2013 Proceedings, Innsbruck Springer-Verlag, Wien, ISBN: 978364236308, Pp 119-130.

Caffyn, A., & Jobbins, G. (2003). Governance capacity and stakeholder interactions in the development and management of coastal tourism: examples from Morocco and Tunisia. *Journal of Sustainable Tourism*, 13 (2): 224- 245.

Cole, S., & Razak, V. (2009). Tourism as future. *Futures,* 41 (6): 335-345.

Carlsson-Kanyama, A., Dreborg, K. H., Moll, H. C., & Padovan, D. (2008). Participative backcasting: a tool for involving stakeholders in local sustainability planning. *Futures*, 40 (1): 34-46.

Dale, C. (2003). The competitive networks of tourism e-mediaries: New strategies, new Advantages. *Journal of Vacation Marketing*, 9 (2):109-118.

D'Ambra, J. & Mistilis, N. (2010). Assessing The E-Capability of Visitor Information Centers. *Journal of Travel Research*, 49 (2): 206-215.

Dwyer, L., Edwards, D., Mistilis, N., Roman, C. & Scott, N. (2009). Destination and Enterprise Management for a Tourism Future. *Tourism Management*, 30 (1): 63-74.

Fennell, D. A., & Butler, R. W. (2003). A human ecological approach to tourism interactions. *The International Journal of Tourism Research*, 5(3): 197–210.

Floyd, J. (2008). Towards an Integral renewal of systems methodology for futures studies. *Futures*, 40 (2), 138-149.

Formica, S., & Kothari, T. H. (2008). Strategic destination planning: Analyzing the future of tourism. *Journal of Travel Research,* 46(4), 355-367.

Freeman, R. E. (2010). Strategic management: A stakeholder approach. Cambridge: Cambridge University Press.

Garriga, E. (2009). Cooperation in Stakeholder Networks: Firms' 'Tertius Iungens' Role. *Journal of Business Ethics,* 90 (4): 623-637.

Garrod, B., Fyall, A., Leask, A., & Reid, E. (2012). Engaging residents as stakeholders of the visitor attraction. *Tourism Management,* 33: 1159 -1173.

Goodier, C., Austin, S., Soetanto, R., & Dainty, A. (2010). Causal mapping and scenario building with multiple organisations. *Futures,* 42 (3): 219-229.

Gra¨ngsjo¨, F. Y., & Gummesson, E. (2006). Hotel networks and social capital in destination marketing. *International Journal of Service Industry Management*, 17 (1): 58- 75.

Gretzel, U., Fesenmaier, D. R., Formica, S. & O'Leary, J. T. (2006). Searching for the Future: Challenges Faced by Destination Marketing Organizations. *Journal of Travel Research*, 45 (2): 116-126.

Gretzel, U., Yuan, Y., & Fesenmaier, D. R. (2000). Preparing for the New Economy: Advertising Strategies and Change in Destination Marketing Organizations, *Journal of Travel Research*, 39 (2): 146-156.

Hage, M., Leroy, P., & Petersen, A. C. (2010). Stakeholder participation in environmental knowledge production. *Futures*, 42 (3): 254-264.

Hall, M. (1999). Rethinking collaboration and partnership: A public policy perspective. *Journal of Sustainable Tourism*, 7 (3): 274–289.

Hjalager, A-M (2010). A review of innovation research in tourism. *Tourism Management,* 31: 1–12.

Lemmetyinen, A. & Go, F. (2009). The key capabilities required for managing tourism business networks. *Tourism Management,* 30: 31–40.

Mistilis, N., & Daniele, R. (2004). Challenges for Competitive Strategy in Public and Private Sector Partnerships in Electronic National Tourist Destination Marketing Systems. *Journal of Travel & Tourism Marketing*, 17 (4): 63-73.

Mitchell, R., Agle, B., & Wood, D. (1997). Toward a Theory of Stakeholder Identification and Salience: Defining the Principle of Who and What Really Counts. *The Academy of Management Review,* 22: 853-886.

Morgan, D. (2011). Beyond epistemological pluralism: Towards an integrated vision of the future. *Futures,* 43(8): 809-819.

Moswete, N., Thapa, B., & Child, B. (2012). Attitudes and opinions of local and national public

sector stakeholders towards kgalagadi transfrontier park, Botswana. *International Journal of*

Sustainable Development and World Ecology, 19 (1): 67- 80

Neville, B., & B.Menguc (2006). Stakeholder Multiplicity: Toward an Understanding of the

Interactions Between Stakeholders. *Journal of Business Ethics,* 66 (4): 377–391.

Paracchinia, M., Pacini, C., Jones, L. and Pérez-Sobad, M. (2011). An aggregation framework to

link indicators associated with multifunctional land use to the stakeholder evaluation of policy

options. *Ecological Indicators,* 11: 71–80.

Quist, J., & Vergragt, P. (2006). Past and future of backcasting: the shift to stakeholder

participation and a proposal for a methodological framework. *Futures,* 38 (9): 1027-1045.

Rodríguez Díaz, J. A. (2009). Networks and the future: A new methodological approach to

envision and create the network society of tomorrow. *Futures,* 41 (7): 490-501.

Sautter, E. & Leisen, B. (1999). Managing stakeholders a Tourism Planning Model. *Annals of*

Tourism Research, 26 (2): 312–328.

Scott, N., Baggio, R., Cooper, C., (2008) Network Analysis and Tourism: From Theory to

Practice, Channel View Publications Sircar, I., Sage, D., Goodier, C., Fussey, P., & Dainty, A.

(2013). Constructing Resilient Futures: Integrating UK multi-stakeholder transport and energy

resilience for 2050. *Futures,*49: 49-63.

Smith, R. A., Vesga, D. R., Cadena, A. I., Boman, U., Larsen, E., & Dyner, I. (2005). Energy

scenarios for Colombia: process and content. *Futures,* 37(1): 1-17.

Soetanto, R., Dainty, A. R., Goodier, C. I., & Austin, S. A. (2011). Unravelling the complexity of collective mental models: A method for developing and analysing scenarios in multi-organisational contexts. *Futures*, 43(8), 890-907.

Rowley, T. (1997). Moving beyond Dyadic Ties: A Network Theory of Stakeholder Influences *The Academy of Management Review,* 22 (4): 887-910.

Tkaczynski, A., Rundle-Thiele, S. R. & Beaumont, N. (2009). Segmentation: A tourism stakeholder view. *Tourism Management,* 30: 169–175.

Van den Hove, S. (2007). A rationale for science–policy interfaces. *Futures,* 39 (7): 807-826.

Van Notten, P. W., Rotmans, J., van Asselt, M., & Rothman, D. S. (2003). An updated scenario typology. *Futures,* 35(5): 423-443.

Waligo, J., Clarke, R. & Hawkins, R, (2012). Implementing sustainable tourism: A multi-stakeholder involvement management framework. *Tourism Management*, 36: 342–353

Yeoman, I., Rebecca, T. Mars, M., & Wouters, M. (2012). *2050-Tomorrow's Tourism* Bristol: Channel View Publications.

Yuan, Y.-L., U. Gretzel, & Fesenmaier, D. (2003). Internet Technology Use by American Convention and Visitors Bureaus. *Journal of Travel Research,* 41 (3): 240-55.

Zach, F.& Racherla, P. (2011). Assessing the Value of Collaborations in Tourism Networks: A Case Study of Elkhart County, Indiana. *Journal of Travel & Tourism Marketing*, 28 (1): 97-110.