National Online Strategy for Tourism

NATIONAL ONLINE STRATEGY FOR TOURISM

Keystone Corporate Positioning
Digital Distribution Working Group
Australian Tourism Data Warehouse

Minister's Message

The National Long Term Tourism Strategy (Strategy) released in December 2009, outlines the long-term policy framework to position the Australian tourism industry as a sustainable and economically vibrant industry.

To facilitate the Strategy, Tourism Ministers established nine working groups to engage in the key issues outlined in the Strategy. Within this framework, the Digital Distribution Working Group (Working Group) was formed to encourage more small and medium tourism businesses to accelerate online distribution of their tourism product and to improve their online presence and capability.

The National Online Strategy for Tourism (NOST), which is an important output of the Strategy is a strategic plan for government to partner with tourism organisations, industry and private enterprise. The NOST was developed by the Digital Distribution Working Group (in partnership with industry), to take advantage of significant opportunities within the digital environment to deliver global competitive advantage to the Australian tourism industry.

While the NOST is a plan for government, it recognises the crucial role of industry as entrepreneurs and innovators in distribution, as well as the challenges they face in adopting new technologies when the consumer and technical landscape is changing at an exponential rate.

The clearly defined roles for government that are articulated in this document, along with the exciting opportunities for collaboration and change, provides the tourism industry with the direction and resources to excel in the digital space.

In implementing the NOST, the Australian Tourism Data Warehouse; the Department of Resources, Energy and Tourism and other Commonwealth Agencies; State Tourism Organisations and Tourism Australia; and the Tourism Research Advisory Board will work with industry to ensure Australia excels in raising the global visibility and capability of Australia's tourism businesses.

The Hon Martin Ferguson AM MP
Minister for Tourism

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Purpose of the National Online Strategy for Tourism (NOST)

The purpose of the National Online Strategy for Tourism (NOST) is to significantly increase the online distribution and global visibility of Australia's tourism product. It provides a plan for the digital enablement of the tourism industry that will ensure Australia excels in the promotion and distribution of tourism product online.

The NOST was facilitated through the National Long-Term Tourism Strategy Digital Distribution Working Group. The Tourism Ministers' Council (TMC) is taking the lead role in the implementation of the Strategy supported by Australian Standing Committee on Tourism.

The NOST:
> Recognises that the industry is at varying stages of adoption of changing distribution methods including a shift to using digital channels such as direct online bookings, online travel agents and social media.
> Enables the Federal and State Tourism Organisations (termed as GTOs) to work collaboratively to ensure Australia excels in the promotion and distribution of its tourism destinations, experiences, product and inventory online.
> Identifies the roles of government, the commercial sector and the tourism industry and specifies the most appropriate and responsive mechanisms for engagement across the various entities.
> Is a deliverable to the Australian Standing Committee on Tourism (ASCOT) and the Tourism Ministers' Council (TMC).
> Is supported by a Going Global Action Plan which provides the tourism industry with a resource that delivers guidance on:
>> o the distribution environment enabled through digital technologies and how it relates to tourism suppliers;
>> o steps by which tourism suppliers can source tools and information that may be available to get their business online, enhance their online marketing effectiveness and accept online transactions;
>> o how to leverage global distribution including explanation of the current landscape of distributors (online travel organisations, online travel portals, airlines, wholesalers, retailers and global distribution systems);
>> o identification of opportunities for distribution through non-traditional travel partners and large scale opportunities that exist to benefit tourism operators through relationships brokered by STOs and Tourism Australia (TA); and

The NOST seeks to identify areas of common ground, where collaborating will deliver sustainable benefits to all, while respecting the necessary points of difference and competition. The strategy also seeks to identify the structural barriers around digital enablement and likely impacts on the marketing and distribution strategies of the GTOs.

The objectives and activities outlined in this strategy will allow the development of a new approach to 'online' for Australia's tourism industry. It aims to create a digital offering where any consumer, anywhere, can find and interact with information and product that is interpretable in a way that is meaningful to them, is bookable (either direct or through an intermediary) and that matches the brand and experience that Australia is trying to provide.

Market Knowledge – Current State of Play

The exponential pace of technology change will impact the future of the Australian online presence. The pervasive, yet not easily measured, impact of social media, the emergence of new mobile technologies and the convergence of these via the 'cloud' will see the ability of governments and businesses to 'control' their online presence significantly reduced. While this has some associated risks, it also provides many opportunities. It is important to review some of the key trends on the current digital landscape to understand the proposed strategic approach later in this document.

> 'The internet is not about websites or dotcoms. It's not that content is king. The internet is a new infrastructure that dramatically reduces transaction and collaboration costs.' Don Tapscott, author of Wikinomics
> There are few, if any, parts of the Australian economy that are immune to the profound influence of the internet.
> Just over 80% of Australia's population of 21.3 million is online - whether at home, school or at work, and many of our offshore visitors (familiar and new) are increasingly making the internet their first (and sometimes only) source of information about us. In the 10 years from 2000-2010 global internet penetration increased 448%, to reach 29% globally (1.5 billion people). By 2020, the global population of 7.5 billion will have 5 billion internet users.
> To date the 'online' Australian National tourism presence has been led largely by Governments and a small number of large private sector enterprises (e.g. Qantas). There are also medium sized private sector organisations that have been pivotal in leading change (for example, www.webjet.com.au) and smaller, new technology businesses like Wotif that have grown to be industry changing.

NWC Opinion Research undertook a quantitative research project in late 2010 to establish the level of online capability across the tourism industry in Australia. The Australian Tourism Data Warehouse (ATDW) data was used as the primary source (75%), supplemented by data purchased from Sensis (25%). The sample size was set at 2,000 and is therefore to be viewed as a snapshot, the findings of which while valuable and enlightening should be used with care. The report is accessible at www.ret.gov.au/tourism.

> The current level of online capability within the Australian tourism industry may be higher than previously reported and likely to increase in the next 12 months; and
> The most effective focus for government will be helping tourism businesses to take the next (rather than the first) steps in developing their online capability.

The Shift to Online – Considerations that have informed this Strategy

> Methods of communication with tourism customers have changed dramatically in the last 10 years and traditional distribution channels have converged with digital channels.
> Game changers have included the Internet, Google (Search & Maps), Social Networks, consumer feedback and Smartphones.
> Online bookings in Australia have increased from 5% in 2001 to almost 35% in 2008 at an average annual growth rate of 34.6%[1]. Globally, this figure is estimated at over 50%.

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[1] The Jackson Report on Behalf of the Steering committee – Informing the National Long Term Tourism Strategy, Commonwealth of Australia, 2009.

> Rich digital content is of significant importance. For example, YouTube surpassed Yahoo! in 2008 to become the 2nd largest search engine globally.
> The number of touch points to consumers has increased exponentially with proliferation of digital and mobile channels.
> Social networking is forcing a new way to connect with consumers using social and word of mouth marketing.
> Mobile computing is on a steep usage incline; using mobiles for just calls and texting is becoming less common, as a third of Australians now check emails on their handsets and more than 70% access mobile entertainment and information services.
> Business and consumers are employing technology to increase efficiencies and speed in information and purchasing.
> The entire trip experience will be 'informationised' – at each point of their journey the consumer will be faced with increased volume and sources of information that may impact their choices.
> Personalisation (where technology is used to allow the delivery of information, products or experiences that are customised to individual preferences and needs) is expected and assumed.
> Semantic technology and the semantic web will drive the next wave of Internet impact/usage by enabling new ways for consumers to discover and consume information in a much more meaningful way.

It is important to note that the Australian tourism industry is comprised of 96.5% Small to Medium Enterprises (SMEs), and while research conducted by NWC Opinion Research[2] late in 2010 showed a higher than expected baseline participation in online activity by the tourism industry in Australia, there was significant variation by sector and in the level of sophistication of that participation.

The growth in consumer preference for online information will make it increasingly important for Governments to facilitate the industry's active engagement online and enable channels to market. Government plays a leadership role in providing information, insights and support for the industry so they can make effective choices about their online capabilities.

Increasing growth of user generated content and commentary will put consumers firmly in control of the online space leaving Governments and private sector organisations in the position of promoting and protecting their brands via influence and moderation of content (rather than direct messaging and controlled communication).

Competitive advantage for Australia will require the provision of very rich and authentic (including consumer supplied) content via the latest delivery technologies of the day.

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[2] Tourism Operators Online Capabilities Benchmark Survey 2010 Research Report. NWC Opinion Research for the Digital Distribution Working Group

Existing Asset – The Australian Tourism Data Warehouse

A successful example of collaborative activity between federal and state tourism organisations, the Australian Tourism Data Warehouse (ATDW) in which all State and Territory Tourism Organisations and Tourism Australia are shareholders. The ATDW was the first public sector initiative in Australia to build a cohesive approach to the distribution of rich tourism content online.

ATDW was formed in 2001 to support the industry to access emerging online distribution channels and has evolved and extended its services and products to industry and its shareholders over time to support rapid technology changes that have affected the digital marketing and distribution of tourism product in Australia.

The current funding model for the State and Territory Tourism Organisations and Tourism Australia contributes approximately $2 million per annum to the ATDW.

Future Direction of the Australian Tourism Data Warehouse

Over the past 10 years the ATDW has provided a collaborative platform for the GTOs to create a national database of tourism information, create a quality data standard and to distribute the content on Australia.com, State and Territory websites and private enterprise websites.

ATDW's role and activities have evolved since it commenced in 2001, to include application development for the GTOs, business intelligence and industry education. In recent years industry and the GTOs have benefited from ATDW's increased focus on research and innovation and the resulting application development, but whilst ATDW has evolved and its activities have been extended, the original purpose to aggregate and distribute product and destination content remains its core function.

The ATDW platform provides the Australian tourism industry with a competitive advantage and its proposed forward strategy demonstrates that the benefits that ensue from the platform can be extended by investing in the technology platform through a technology strategy that responds to consumer trends.

ATDW has undertaken extensive research and analysis to design a forward strategy for ATDW that will serve the industry and GTOs well through the continuing evolution of digital technologies and the internet. The forward strategy recognises that many of Australia's tourism suppliers have begun their journey of marketing and distributing online and at least have a website and that their appetite for more knowledge and engagement with digital tools is continuing to grow.

The ATDW forward strategy acknowledges the consumer far more than earlier industry focused strategies, and addresses consumer and technology trends including ubiquity of mobile devices, personalisation of information, the semantic web (web 3.0) and a global movement to the internet for enabling communities online.

This does not mean that ATDW will become a consumer brand, but that ATDW will deliver content services that support consumer behaviour and that ATDW will continue to prototype and develop consumer application software that GTOs and industry can deploy.

The strategy also recognises the importance of intermediaries and the role they play in taking Australia to the global market and includes technology advancements that make it easier for distributors to access ATDW.

This forward strategy aligns with the National Online Strategy for Tourism (NOST) and will directly support activities in the NOST. ATDW will be able to directly support the NOST where GTOs agree on shared projects, be they in education, communication, content or technology and wish to use ATDW as the delivery vehicle.

NOST Development Process

The development of the NOST commenced with using work that had been undertaken by the National Online Strategy Committee (NOSC) – a committee comprised of GTO digital and marketing specialists.

The DDWG has taken the outline or "strawman" strategy developed by NOSC and further enhanced and evolved the thinking, informed by the consultation and research phase of this project.

Qualitative (stakeholder consultation) and quantitative (benchmark research) studies have been undertaken.

Industry Consultation and Findings

The DDWG conducted extensive industry consultation to develop this strategy. 107 stakeholders were targeted and 97 (91.5%) participated in the consultation phase.

Key stakeholders consulted included:

> Industry (using National Tourism Alliance (NTA), Australian Tourism Export Council (ATEC) and the Tourism and Transport Forum (TTF) membership, key influencers plus some state nominated SMEs)
> Trade and Commercial Partners
> A selected group of influencers with a representative spread of online experience and participation.

The outline or "strawman" strategy developed by NOSC was used as the basis for discussion and industry feedback around the five themes of:

> Research and Insights
> Partnership, Collaborative Opportunities and Benefits.
> Industry and Trade Communication and Education.
> Consumer Engagement, Marketing and Content.
> Distribution (Connecting Consumers, Distributors & Product).

Key Findings:

> There was widespread support for the five themes but also collective agreement about the key challenges being:
> - The challenge of government at all levels working in collaboration and operating uniformly;
> - The role and activities of the ATDW not being readily understood;
> - Multiple sources of information of differing quality are contributing to industry confusion about online;
> - There is a need for a centralised source for research and innovation which is focussed on digital;
> - Government and the private sector have different roles and specific capabilities;
> - Government should undertake activities which support the private sector to achieve the best possible outcomes for the industry as a whole;
> - It is complex and challenging for Government to play a role in online booking due to this mostly being the province of the private sector. This is largely due to the confusion around the different ways in which STOs are engaging with Tourism Exchange Australia (TXA) and implementing online booking capability to their consumer websites;
> - Chronic time poverty of the SME owner/operator has a major impact on the SME's ability to learn and adopt new technologies;
> - Government objectives, such as accreditation and pricing models, can compromise access to the diversity of products and experiences available in Australia on Government consumer websites;

The National Online Strategy for Tourism

Our Vision:
'A collaborative approach to Australia's online presence that provides the tourism industry with the direction, leadership and resources to excel in the digital space.'

Our Mission:
To deliver global competitive advantage to Australian tourism.

Our Five Key Themes:
> Research and Insights.
> The Benefits of Partnership and Collaboration.
> Industry and Trade Communication and Education.
> Content and Consumer Engagement.
> Distribution.

Research and Insights
Role of Government:
Identification of emerging trends, up to date information and ongoing monitoring of consumer behaviour for the tourism industry and all levels of government.

Three key areas of research and insights for industry and government have been identified:

> *Keeping abreast of technology advances*

  o Ongoing environmental scanning of extensive information and research being produced globally on the continuing enhancement of digital technologies and its application for the tourism industry.

  o Interpretation and dissemination of these reports and research papers for use by industry and government to keep them abreast of the trends.

> *Consumer Online Behaviour:*

  o Implement an ongoing program to monitor consumer usage of digital technologies for travel planning to understand how consumers use digital resources to inform how we remain contemporary and relevant.

> *Industry capabilities*

  o Repeat the NWC benchmark survey of SMEs regularly to monitor improvements in industry capability according to the new baseline and to uncover impacts of the NLTTS and NOST.

  o To counter the lack of a suitable comprehensive tourism database on which to conduct the benchmark survey, explore the opportunities to survey the entire ADTW database. An enhanced listing (above the current 26,000 records in the database)

would provide an extremely relevant and cost effective sample group for the conduct of future industry capability surveys, as well as providing us with a significant channel for industry communications.

Note: Given the importance of Digital as a key focus of the NLTTS, it is recommended that the above research should be reflected in the National Tourism Research Agenda.

Opportunities for industry:

> Provide insights to government on latest trends in consumer behaviour online in relation to travel planning, technology and future research needs.

Partnership and Collaboration
Role of Government:

Share resources, avoid duplication and obtain economies of scale by partnering across borders, across all levels of government and with the private sector.

The State and Territory Tourism Organisations and Tourism Australia will continue to collaborate in order to:

> Benefit from cost-efficiencies and economies of scale when developing technology initiatives
> Better arrangements and outcomes when seeking partnership opportunities
> Delivering a united and coordinated approach from government to industry and stakeholders

Key initiatives will include:

> Develop a national strategy for collection of tourism content in the ATDW. Implications for the current role and work activities of GTOs will include:

  o Migrate the ATDW technology platform toward a true national index of tourism products and away from individual state databases that are superficially linked together.
  o Review the policies and practices of STOs, especially with respect to charging models, in order to bring about a true national index of quality tourism product. See http://www.ret.gov.au/tourism/tmc/workinggrps/tqca/.
  o Encourage an increase in the number of tourism products indexed within the ATDW by removing current barriers.
  o We must recognise that any proposed national approach will happen over a period of time as there will be considerable change required across government.
  o Any national approach must also take into account existing revenue models of industry and other stakeholders, and should clearly demonstrate the benefits to the consumer.

> Consider a new name and positioning for ATDW that better reflects the role and scope necessary to deliver on the objectives of the NOST

  o A continued commitment across all States, Territories and TA to ongoing investment in the ATDW as the cornerstone of a national and easily accessible index of Australia's tourism product and related content.

- o Introduce an " industry reference group" that allows the ATDW to better align its activities and direction with industry needs
- o Facilitate cooperation and joint funding models on digital initiatives across GTOs and the public and private sectors
- o Encourage co-operative content sharing arrangements between GTOs and private sector content providers.
- o Improve coordination and cost effectiveness between TA, STO and Regional/Local Tourism Association websites and online activity.

Opportunities for industry:
> Participation in and input to:
  - o Industry reference group to align industry needs with activities and direction of the ATDW;
  - o Digital initiatives with GTOs and public and private sectors;
  - o Co-operative content sharing opportunities between GTOs, other Government agencies (e.g. Parks Authorities) and private sector content providers; and
  - o Identify and implement content distribution partnerships with the private sector.

Communication and Education
Role of Government:
Deliver effective communication and education programs that will increase tourism industry knowledge, understanding and capability

Key initiatives will include:

> Provision of education materials

  - o Support the continued development of the Tourism e-Kit as the most relevant resource designed specifically for the education of the tourism industry, covering all aspects from the basics of getting online to real-time inventory management and booking.
  - o Increase communication to industry to drive an increased uptake of the resources available and increase the profile and effectiveness of the Tourism e-Kit.
  - o Continue with ongoing development and improvement of the Tourism e-Kit program, and provision of these educational materials for industry usage made widely available via online mechanisms.
  - o Refine and further develop education materials for the industry with particular emphasis on the needs of time poor SMEs who have a preference for one- to one education and training.
  - o Refine the tourism e-kit to become a resource for tourism industry associations and registered training organisations to conduct tourism workshops and seminars.
  - o Scope the need and requirement for a train the trainer program.
  - o Encourage tourism industry associations to participate in the train the trainer program to enable face to face delivery of the tourism e-kit to their membership base, if the requirement exists.
  - o Explore any opportunities resulting from government programs (including the new TQUAL program) for industry associations and registered training organisations to access funding to assist with mechanisms that build industry capabilities (e.g. the development of workshops).

- o Encourage the introduction of the Tourism e-Kit into the curriculums of formal learning programs and courses, in particular seek its inclusion into the Tourism, Hospitality and Events training package. Currently the working group has a pilot underway with Illawarra Institute of TAFE to map the Tourism e-Kit content to Certificate 3 for Tourism level.

> Increase the focus on digital in GTO resourcing and communication.

- o Actively encourage the inclusion of digital discussion topics into industry events, conferences and workshops – via peak industry associations and through inclusion in the annual Directions Conference.
- o Encourage GTOs and industry to increase the level of resources allocated to digital
- o Explore opportunities for collaboration by GTOs on digital skills training and development to allow key staff to better understand the impacts of digital to their current roles and projects.
- o Encourage GTOs to have a high level of understanding of digital marketing, distribution and technology to allow them to be digital 'fast followers' in terms of adoption.

> Improved industry communications.

- o Ensure relevant insights to industry are easily accessible and communicated.
- o Identify or create a single, authoritative source for Government communication in the online space to share information on, and support the delivery of, new digital initiatives.
- o Improved communication between government and the travel industry to share insights and disseminate knowledge.

Opportunities for Industry
> Participation in education initiatives ;
> Delivery of workshops and training, including the Tourism e-kit train the trainer program; and
> Activities linked to information and knowledge sharing through online space dedicated to new digital initiatives.

Content & Consumer Engagement
Role of Government
Develop the most compelling digital content possible to market Australia, its destinations, experiences and products.

Key Initiatives will include:

> Development of quality deep, rich, authentic and relevant tourism content about Australia's destinations and experiences as a core role of government:
- o This content needs to be further enhanced by product and inventory information provided by the industry, including enhancement by TQUAL accreditation information.
- o Explore opportunities for relevant quality content feeds provided by the private sector, ie restaurants, events listings, weather and user-generated content.

> An increased focus on digital marketing for Australia will:
>   o Deliver the widest possible range of content about destinations, experiences, and products with increased priority on collecting and disseminating high quality images and video.
>   o Encourage the expansion of user generated content.
>   o Support and enable conversations in the Social Media space.
>   o Develop social media applications that engage consumers in their preferred platforms.
>   o Deliver content via mobile devices that significantly expand visitor servicing functionality on demand
>   o Deliver deep rich content in language relevant to priority source markets.

Opportunities for Industry
> Development of richer content for marketing purposes including:
>   o Video;
>   o Social media applications to interact with clients in their preferred platforms; and
>   o Market relevant translations of product information

Distribution
Role of Government:
Enable and support the most innovative, effective and comprehensive distribution of Australian tourism product, inventory and content.

Key initiatives will include:

> Enable the connection of Australian tourism product to the global digital marketplace.

>   o Provide platforms for tourism industry suppliers and global distribution partners to broker business relationships for commercial return.
>   o Identify global distribution opportunities and communication of these to industry.
>   o Encourage the rate of uptake of online booking systems by the industry as the next important step in digital enablement.

> Develop the Going Global Action Plan a comprehensive resource for the Australian tourism industry to understand the global marketplace and opportunities for business growth.

>   o Provide motivating content to travel distributors for inclusion in their online offering to enhance what they have to offer their customers.
>   o Increase the visibility of Australia's tourism content through global distribution channels that will enable consumers to find and interact with content that is meaningful to them, is bookable (either direct or through an intermediary) and that matches the brand and experience that the industry is trying to provide.
>   o Create opportunities for digital distributors to participate in forums, trade shows and events that link them with Australian product suppliers

Opportunities for Industry
> Implementation of online booking systems as next stage of digital enablement; and
> Participation in government product distribution initiatives including trade shows, forums.

Implementation of the NOST

The concept of a National Online Strategy for Tourism cannot be owned by a single entity. As previously stated, the NOST seeks to identify areas of common ground, where collaborating will deliver sustainable benefits to all, while respecting the necessary points of difference and competition.

Development of the NOST has been a collaborative process involving Government Tourism Organisations, industry and other key stakeholders to deliver a new approach to 'online for the Australia's tourism industry. Delivery and management of many of the projects outlined in this Strategy document have, where appropriate, been incorporated into the forward operations of the Australian Tourism Data Warehouse, however other stakeholders will also have clearly defined roles in the implementation process.

The Action Table at the end of this document details the necessary tasks, timelines and identifies the forward roles of stakeholders in implementing the NOST.

Once the NOST implementation process commences, the Digital Distribution Working Group will continue to meet periodically to monitor the progress of actions and report back through the Australian Standing Committee on Tourism to the Tourism Ministers' Council.

Governance

The formulation of the NOST included consideration of the best governance framework to ensure appropriate entities or committees exist to implement the actions in the NOST. Refer Figure 1 at the end of this document.

Relationships and communications can be activated through these entities' and committees' regular meetings and communications.

As previously stated, ATDW will play a role in delivery of many of the actions to support the strategy. The ATDW board, through its governance framework, approves budget and business plans and monitors the work of the ATDW.

National Online Strategy for Tourism – Table of Actions

Vision: 'A collaborative approach to Australia's online presence that provides the tourism industry with the direction, leadership and resources to excel in the digital space.'

Mission: To deliver global competitive advantage to Australian tourism.

	ACTION	ATDW	C'WEALTH GOVT (RET / TRA)	GTOs / TA / CEO FORUM	OTHER NLTTS WORKING GROUPS	INDUSTRY
1	**Research and Insights**					
1.1	Keeping abreast of global technology advances	✔	✔	✔ TA Lead	TRAB	✔
1.1.1	Identification of emerging trends in digital technologies and its application for the tourism industry.	✔	✔	✔ TA Lead	TRAB	✔
1.1.2	Interpretation and development of reports for use by industry and government to keep them abreast of the trends.	✔	✔	✔		✔
1.2	**Consumer online behaviour**					
1.2.1	Establish/agree methodology to monitor consumer usage of digital technologies for travel planning.		✔	✔	✔ TRAB Lead	✔
1.3	**Industry capabilities**					
1.3.1	Seek to undertake the NWC Benchmark survey periodically to monitor improvements in industry capability over time.		✔		✔ TRAB lead	

	ACTION	ATDW	C'WEALTH GOVT (RET / TRA)	GTOs / TA / CEO FORUM	OTHER NLTTS WORKING GROUPS	INDUSTRY
2	**Partnerships and Collaboration**					
2.1	Development of a national strategy for the collection of tourism content in the ATDW	✔ Lead		✔		
2.1.1	Migrate the ATDW technology platform toward a true national index of tourism products and grow its capacity for identifying and distributing content beyond the individual state databases that contribute to the National ATDW database.	✔ Lead		✔		
2.1.2	Support a review of the policies and practices of STOs, including with respect to charging and participation models, in order to bring about a true national index of quality tourism product.	✔ Lead		✔	✔	
2.2	Consider a new name and appropriate governance model for the ATDW to better reflect its future business model.	✔ Lead		✔		
2.2.1	A commitment from all ATDW shareholders to ongoing investment as the cornerstone of a national and easily accessible index of Australia's tourism product and related content.	✔		✔ Lead		
2.2.2	Introduce a "digital industry reference group" that allows the ATDW to better align its activities and direction with industry needs	✔ Lead		✔		✔
2.2.3	Facilitate cooperation and joint funding models on digital initiatives across GTOs and the public and private sectors	✔		✔ Lead		✔
2.2.4	Encourage co-operative content sharing arrangements between GTOs and private sector content providers.	✔ Lead		✔		✔
2.2.5	Improve coordination and cost effectiveness between TA, STO and Regional/local Tourism Association websites and online activity	✔ Lead		✔		✔
3	**Communication and Education**					
3.1	**Provision of educational materials for use by industry**					
3.1.1	Ongoing development of the Tourism e-Kit as the best and most relevant resource designed	✔				✔

	ACTION	ATDW	C'WEALTH GOVT (RET / TRA)	GTOs / TA / CEO FORUM	OTHER NLTTS WORKING GROUPS	INDUSTRY
	specifically for the education of the tourism industry, covering all aspects from the basics of getting online to real-time inventory management and booking. Consideration of the needs of time poor SMEs who have a preference for one-on-one education and training.	Lead				
3.1.2	Enhance communication to industry to drive an increased uptake of the resources available and increase the profile and effectiveness of the Tourism e-Kit. Make the tools and materials widely available via online mechanisms.	✔ Lead	✔	✔		✔
3.1.3	Develop a train the trainer module of the tourism e-kit to enable delivery of tourism workshops and seminars by tourism industry associations and registered training organisations. Interest to be scoped first.	✔ Lead		✔		✔
3.1.4	Scoping of interest for a train the trainer initiative for industry associates.			✔		✔ NTA Lead
3.1.5	Encourage tourism industry associations to participate in a train the trainer program to enable face to face delivery of the tourism e-kit to their membership base.			✔		✔ NTA Lead
3.1.6	Encourage industry associations and registered training organisations to apply for government funding (including from the Australian Government *TQUAL Grants* program) that build industry capability.	✔	✔ RET Lead	✔		✔
3.1.7	Encourage the introduction of the Tourism e-Kit into the curriculums of formal learning programs and courses.	✔	✔	✔	✔ Labour/ Skills	✔ Service Skills Australia Lead
3.2	**Improved industry communications**					
3.2.1	Ensure relevant insights to industry are easily accessible and communicated. Facilitate a knowledge base and online community to store, disseminate and share information, case studies,	✔ Lead	✔	✔	✔	✔

	ACTION	ATDW	C'WEALTH GOVT (RET / TRA)	GTOs / TA / CEO FORUM	OTHER NLTTS WORKING GROUPS	INDUSTRY
	research and tools across Government and the private sector to support the delivery of new digital initiatives (ie: a wiki for stories and content + communication tool as online forum					
3.2.2	Actively encourage the inclusion of digital discussion topics into industry events, conferences and workshops – via peak industry associations and through inclusion in the annual Directions Conference.	✓	✓	✓ Lead	✓	✓
4	**Consumer Engagement, Marketing and Content**					
4.1	Development of deep, rich, authentic and relevant tourism content about Australia's destinations and experiences as a core role of government. Deliver the widest possible range of quality content about destinations, experiences, and products with increased priority on collecting and disseminating high quality images and video.			✓ Lead		✓
4.1.1	Explore opportunities for relevant quality content feeds and indexing provided by the private sector, ie restaurants, events listings and user-generated content.	✓ Lead		✓	✓ TQCA	✓
4.1.2	Support the industry to further enhance product content with inventory data and booking capability.	✓ Lead		✓		✓
4.2	**Increased focus on digital marketing for Australia**					
4.2.1	Encourage GTOs to have a high level of understanding of digital marketing, distribution and technology to allow them to be digital 'fast followers' in terms of adoption	✓		✓ Lead		
4.2.2	Explore opportunities for collaboration by GTOs on digital skills training and development to allow key staff to better understand the impacts of digital on their current roles and projects.	✓ Lead		✓		
4.2.3	Increased focus on Social Media platforms.	✓		✓ Lead		✓
4.2.4	Increased focus on mobile devices.	✓		✓ Lead		✓

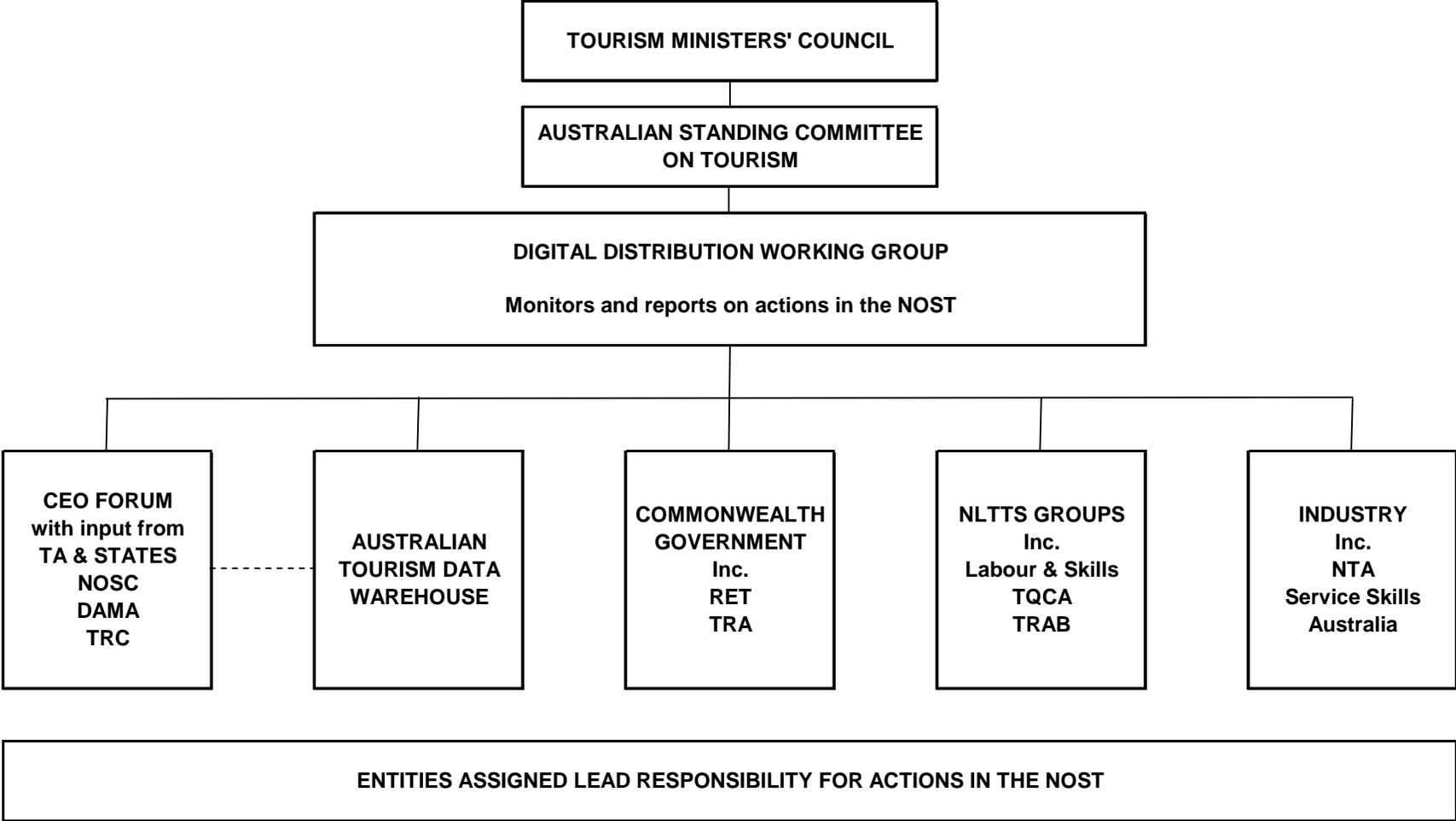|	ACTION	ATDW	C'WEALTH GOVT (RET / TRA)	GTOs / TA / CEO FORUM	OTHER NLTTS WORKING GROUPS	INDUSTRY
4.2.5	Enable content to be delivered in languages, relevant to priority source markets.	✔		✔ Lead		✔
5	**Distribution (connecting consumers, distributors and products)**					
5.1	Enable the connection of Australian tourism product to the global digital marketplace	✔ Lead		✔		✔
5.1.1	Provide platforms for tourism industry suppliers and global distribution partners to broker business relationships for commercial return.	✔ Lead		✔		✔
5.1.2	Identify global distribution opportunities and communication of these to industry.	✔ Lead		✔		✔
5.1.3	Provide motivating content to travel distributors for inclusion in their online offering to enhance what they have to offer their customers.	✔ Lead		✔		✔
5.1.4	Increase the visibility of Australia's tourism content through global distribution channels that will enable consumers to find and interact with content that is meaningful to them, is bookable (either direct or through an intermediary) and that matches the brand and experience that the industry is trying to provide.	✔		✔ Lead		✔
5.1.5	Create opportunities for digital distributors to participate in forums, trade shows and events that link them with Australian product suppliers	✔		✔ Lead		✔
5.1.6	Encourage the rate of uptake of online booking systems by the industry as the next important step in digital enablement.	✔		✔ Lead		✔
5.1.7	Distribution of the Going Global Action Plan a comprehensive resource for the Australian tourism industry to understand the global marketplace and opportunities for business growth.		✔ RET Lead	✔		✔

National Online Strategy for Tourism – Governance Framework

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                    │     TOURISM MINISTERS' COUNCIL    │
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                    │   AUSTRALIAN STANDING COMMITTEE   │
                    │            ON TOURISM             │
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          │        DIGITAL DISTRIBUTION WORKING GROUP            │
          │                                                      │
          │     Monitors and reports on actions in the NOST     │
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CEO FORUM with input from TA & STATES NOSC DAMA TRC	AUSTRALIAN TOURISM DATA WAREHOUSE	COMMONWEALTH GOVERNMENT Inc. RET TRA	NLTTS GROUPS Inc. Labour & Skills TQCA TRAB	INDUSTRY Inc. NTA Service Skills Australia

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│      ENTITIES ASSIGNED LEAD RESPONSIBILITY FOR ACTIONS IN THE NOST        │
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Figure 1 – Governance Framework

Glossary of Terms and Abbreviations

ASCOT - Australian Standing Committee on Tourism	The Australian Standing Committee on Tourism reports to the Tourism Ministers' Council. The objective of ASCOT is, under the direction of the Tourism Ministers' Council, to improve coordination and cooperation of government policies and activities as they affect tourism. ASCOT members are officials responsible for tourism from the Commonwealth (ASCOT Chair), each Australian state and territory and New Zealand. Observer status is held by Norfolk Island and Papua New Guinea.
ATDW - Australian Tourism Data Warehouse	The Australian Tourism Data Warehouse was created in 2001 as a joint initiative of the Government Tourism Organisations from all Australian States and Territories and Tourism Australia to further secure Australia's position in the global tourism marketplace and increase the number and expenditure of visitors to Australia. It is a central distribution and storage facility for tourism industry product and destination information from all Australian States and Territories. This content is compiled in a nationally agreed format and electronically accessible by tourism business owners (operators), wholesalers, retailers and distributors for use in their websites and booking systems.
DDWG - Digital Distribution Working Group	The Working Group established through the National Long Term Tourism Strategy to oversee the Digital Distribution work plan. The Digital Distribution Working Group comprised representatives from State Tourism Organisations, the Australian Tourism Data Warehouse, Australian Government Department of Resources, Energy & Tourism and was Chaired by NSW.
GGAP – Going Global Action Plan	The Going Global Action Plan takes the distribution section of the National Online Strategy for Tourism and enhances it to become a guide to industry. It will be used by Australian tourism businesses to assist them to better understand the opportunities to distribute their products globally.
GTO - Government Tourism Organisation	See State Tourism Organisation.
NLTTS - National Long-term Tourism Strategy	The National Long-Term Tourism Strategy incorporates recommendations from the Jackson Report covering tourism priorities such as addressing regulatory impediments, skills and labour shortages, investment, infrastructure, planning and indigenous tourism, climate change implications, research and marketing. The Strategy establishes the framework and principles for ensuring that the tourism industry is a competitive and sustainable industry into the future. The principles respond to the key structural issues that are confronting the tourism industry and, if not addressed, will continue to impede industry growth.

NOSC - National Online Strategy Committee	The National Online Strategy Committee comprises representatives from Tourism Australia and each of the State and Territory Tourism Commissions. It has been responsible for developing the National Online Tourism Strategy for approval by the Chief Executives of the Tourism Commissions. NOSC provides a forum for knowledge sharing, co-operation and collaboration on cost sharing projects. NOSC also provides strategic input to the business directions of ATDW Pty Ltd.
NOST - National Online Strategy for Tourism	The National Online Strategy for Tourism document will be for the use of Federal and State Tourism Organisations. It will ensure that Australia excels in the promotion and distribution of its tourism product online.
RET – Australian Government Department of Resources Energy and Tourism	The Department of Resources, Energy and Tourism provides advice and policy support to the Australian Government regarding Australia's resources, energy and tourism sectors. The Department develops and delivers policies to increase Australia's international competitiveness, consistent with the principles of environmental responsibility and sustainable development.
RTO – Regional Tourism Organisation	Regional Tourism Organisations are fully independent organisations with their own skills-based Boards and staff. They are responsible for tourism marketing, leadership and development and the coordination of industry, local government and community destination marketing.
Semantic web	The Semantic Web is driving the evolution of the current Web by enabling users to find, share, and combine information more easily. The semantic web is a vision of information that can be readily interpreted by machines, so machines can perform more of the tedious work involved in finding, combining, and acting upon information on the web.
STO – State Tourism Organisation	Each state and territory within Australia has its own government tourism agency to work with the industry within its borders. These agencies also work in partnership with the Federal Government to promote Australia as a tourism destination internationally. Within each state and territory there are a number of other organisations which address issues of tourism and the needs of tourists.
Straw man	The straw man is the culmination of six months of strategic workshops undertaken by the National Online Strategy Committee in the development of the draft National Online Strategy for Tourism document. This work involved Tourism Australia and all the State Tourism Organisations in Australia
TA – Tourism Australia	Tourism Australia is the Australian Government agency responsible for international and domestic tourism marketing as well as the delivery of research and forecasts for the sector. Its' main objectives are to influence people to travel to Australia, visit more places, encourage Australians to see their own country, and help build a more sustainable and profitable industry.
TMC - Tourism Ministers' Council	The Tourism Ministers' Council was established in 1959. It provides a forum for consultation and policy coordination on tourism matters of mutual interest to the Commonwealth, state and territory and New Zealand Governments.

Tourism e-kit	The Tourism e-kit is a series of simple tutorials designed to assist tourism operators to make the most of opportunities the internet provides and provide them with the skills and knowledge to make informed decisions on this important area of business.
TXA - Tourism Exchange Australia	TXA is an inclusive booking exchange that incorporates inventory and pricing from multiple booking systems and then distributes it widely to various websites. TXA offers distributors and operators the opportunity to increase their sales and provides consumers with the ability to source high quality tourism content and book it securely online.
VIC – Visitor Information Centre	A visitor information centre is a physical location providing tourist information to visitors who tour the place or local area.