

# Sustainable Tourism – Destinations and Communities



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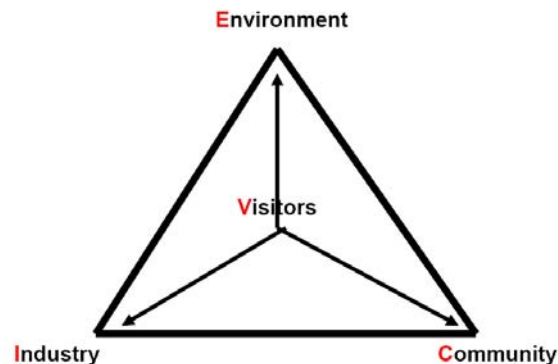
TABLE OF CONTENTS

- INTRODUCTION.....3**
  
- DESTINATION PLANNING.....4**
  - SITUATION ANALYSIS..... 5
  - PLANNING PROCESS ..... 18
  - ONGOING ENGAGEMENT ..... 29
  - IMPLEMENTATION ..... 30
  - DESTINATION DEVELOPMENT..... 31
  - DESTINATION MARKETING ..... 51
  - ONGOING MANAGEMENT ..... 57
  
- DESTINATION PERFORMANCE .....61**
  - PERFORMANCE MONITORING AND EVALUATION ..... 62
  - SUSTAINABILITY BENCHMARKING AND REPORTING ..... 63
  - VISITOR SATISFACTION ..... 64
  - RISK MANAGEMENT ..... 65
  - REVIEW OF THE PLANNING FRAMEWORK ..... 66
  - EDUCATION OF THE VALUE AND ROLE OF TOURISM ..... 67
  
- TOOLS AND CASE STUDIES.....67**
  - DESTINATION PLANNING RESOURCES ..... 68
  - IMPLEMENTATION RESOURCES ..... 69
  - DESTINATION PERFORMANCE RESOURCES ..... 69

## Introduction

Tourism is regarded as one of the top five employers world-wide and plays a significant role in the economic and social development of many destinations and communities around the world. Destinations seeking to find a balance between their economic, social and environmental aspirations are engaged in 'destination management'. The internationally recognised VICE model recognises that tourism in a destination is the interaction between:

- Visitors;
- the Industry that serves them;
- the Community that hosts them; and their collective impact on, and response to
- the Environment where it all takes place.



**Source: New Zealand Ministry of Tourism et al, 2006 'Tourism Planning Toolkit for Local Government', Ministry of Tourism, New Zealand**

The Sustainable Tourism Cooperative Research Centre (STCRC) has invested over \$260 million in research during the last 12 years to understand the factors that influence 'success' and the most effective way to achieve sustainable tourism development through destination management. Destination managers and tourism planners have recognised the need for a more holistic approach to destination planning, development and marketing. Over the last decade tourism stakeholders at the destination level have gradually shifted focus from the traditional marketing and promotional functions to the more coordinated strategic approach of destination management. The term 'destination management' and other tourism-specific terminology are often defined differently.

How to use Sustainable Tourism Online

Sustainable Tourism Online provides information and resources to assist the sector in taking a destination management approach to tourism. Drawing on the extensive research of the STCRC and other international partners, this section on Sustainable

Destinations and Communities is presented in three phases or modules of destination management, accompanied by practical tools and case studies. The three phases are:

- Destination Planning;
- Destination Implementation; and
- Destination Performance.

Within each section you will find a summary of the research to date, specific research and resources on subject areas relating to destination management and links to case studies, reports and tools. These resources are provided to assist:

Destination Management Organisations;

- Local Government and State Government departments responsible for tourism infrastructure and amenity;
- Tourism Professional Support providers;
- Tourism Businesses;
- Academics, Researchers and Students; and
- Media.

Please use to links and search functions to navigate through the Sustainable Destinations and Communities content and resources. You can also download a 'Site-Map' to view the structure of the topics and content in the Sustainable Destinations and Communities section, as well as a downloadable PDF version of the entire 'Sustainable Destinations and Communities Guide'.

## Destination Planning

Tourism can and will evolve with or without planning, however the sustainability of a destination depends on whether the type and scale of tourism is best suited to the destination. Effective destination management relies on an iterative and continual planning process that integrates tourism into a community's social, economic and environmental aspirations. Tourism destination planning is an area which has attracted significant research and analysis, summarised in the following sub-sections of Destination Planning:

- Situation Analysis
- Planning Process
- Ongoing Engagement

Effective destination management looks at the strategic direction for future development, marketing and management of tourism where decision making is based on an assessment of the best available knowledge. In short, effective destination planning should:

- Be collaborative process that ensures the engagement, participation and commitment of all relevant stakeholders;
- Be a coordinated approach that is managed based on clearly defined processes and frameworks;

- Be based on an understanding of existing internal and external operating environments of the destination;
- Be based on a sound understanding of tourism supply and demand forecasts for the destination;
- Consider all relevant information including market research, stakeholder values, the planning environment and available resources and assets;
- Develop a clear and agreed strategic direction for the destination including a tourism vision, goals, strategies and actions, brand and positioning, roles and responsibilities, ongoing management processes and performance measures;
- Result in the development of key planning and strategic documents including plans for destination management, ongoing research, strategic marketing, risk identification and management;
- Be used to inform all phases of destination management including 'Implementation' and 'Destination Performance';
- Be an ongoing or cyclical process, where plans and strategies are regularly reviewed to ensure relevance within the changing environment.

Elements of effective destination planning can be achieved through three steps - the situation analysis phase, the planning process and ongoing engagement. Further information on these steps is provided in the links below along with specific information, tools and resources to assist destination managers.

## Situation Analysis

You can't manage what you don't understand. The key to unlocking the potential of a destination is understanding how it performs against a set of agreed benchmarks (for example market share, yield, triple-bottom line sustainability). The situation analysis phase of destination management involves analysing and understanding the environment in which a tourism destination operates. The aim is to assist destination managers in identifying key factors that will influence how a destination is developed, marketed and managed over time. It is an essential part of 'Destination Planning' and should underpin the 'Implementation' phase where the strategic direction for a destination is committed to action.

Research has shown that a comprehensive situation analysis should include:

- An understanding of the destination community's aspirations and values;
- Identification and analysis of current visitor markets;
- Understanding consumer (visitor) characteristics, behaviours and preferences to identify preferred future target markets;
- Reviewing and analysing the operating environment of a destination, including internal and external factors that might influence the planning and development a destination;

### Destination Management Tip

Statistics can describe the past and attempt to predict the future, but the best indication of the future comes from engaging the tourism industry, community leaders and influencers.

- Undertaking an infrastructure, product and experiences analysis that is matched with a visitor demand analysis to identify key gaps in the destination's product offering and opportunities to value add to the visitor experience;
- Measurement of the value of tourism, including economic and non-economic contribution, to provide understanding and potentially increased recognition of the importance of tourism;
- Forecasts of future visitation in sufficient detail to support understanding of the likely demand and the future mix of visitors;
- An understanding of the existing and future resource impacts of tourism on a destination and identification of strategies to develop a sustainable approach to tourism development and growth. This includes an assessment of the impact on natural areas and protected areas within a destination;
- An indication of the vision for tourism is articulated and agreed by the governments, tourism industries and community stakeholders;
- A review of important issues, challenges and opportunities facing the destination across the short-term, medium-term and long-term;
- Recognition of the human and financial capital available to support tourism and destination management;
- An analysis of the statutory and planning environment and how these regulations will impact on tourism planning and development in a destination, including the impact of climate change regulations;
- Review and where possible alignment of region-level strategic planning with national and state policies and plans to assist the development of partnerships and leverage strategic opportunities.
- Review of lessons learned from other destinations on pitfalls, successes and future opportunities.

Please use the links below to find out more about the Situation Analysis phase of destination management.

### *Understanding the Host Community*

The support of the host community is important in achieving sustainable tourism. This is just one of the many reasons why successful destination planning begins with an understanding of the needs and aspirations of the host community. This understanding needs to go beyond descriptions of demographics and population trends to explore:

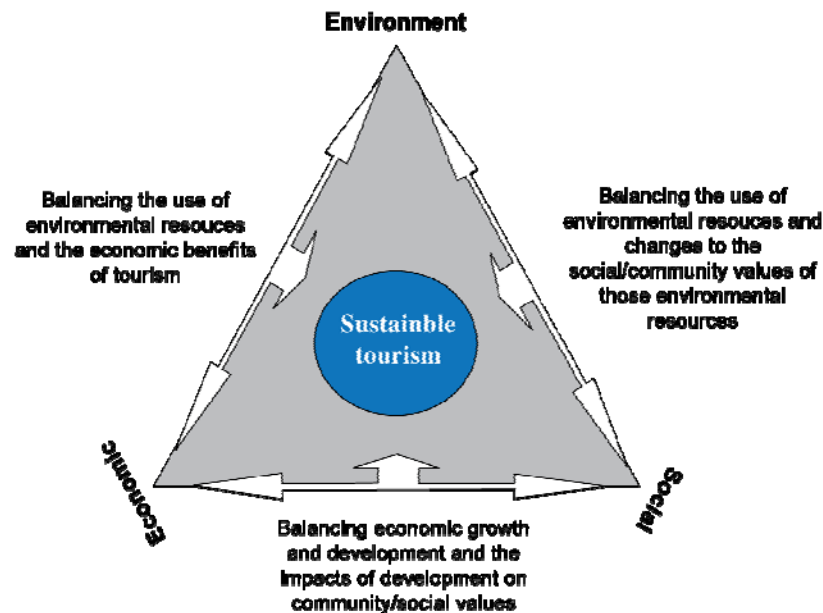
- The community's perceptions and attitudes towards tourism;
- Aspirations and challenges of the community for tourism
- The history of tourism development in the destination;
- Natural, built and socio-cultural features and icons that are valued by the community;
- The type and style of development the community desire or have fought against in the past; and
- The stories and experiences that bring the community together.

#### **Destination Management Tip**

Understanding the history of tourism in a destination and its impact on the host community provides a good indication of the community's needs and aspirations and the style of tourism that is desired.

As described in the Sustainable Regional Tourism Destinations Project' developed by the Sustainable Tourism Cooperative Research Centre, a sustainable tourism destination is reached when environmental, community and economic values are balanced. Incorporating social and community values is achieved through collaboration and compromise to reach a level and style of tourism that:

- Is consistent with community values and aspirations both now and over the long term, and contributes to community development and well-being;
- Increases the contribution of tourism to the economy of regional destinations and promotes
- long-term industry viability.



Source: Adapted from Dredge, D. 2008. Managing Local Tourism Master Class: Eastern Metropolitan Regional Council Workshop Materials, Southern Cross University, Tweed Heads, Australia.

### *Understanding Visitors*

Tourism destinations appeal to a wide variety of different types of visitors who are often categorised by:

- Lifestage eg. Young Families
- Demographics
- Attitudes and values eg. Experience Seekers
- Type of holiday eg. Beach Holiday

- Duration of trip eg. Short Break
- Purpose of travel eg. Visiting Friends and Relatives

It is therefore essential that a tourism destination clearly understands their current and desired visitor markets to influence how a destination is developed, managed and marketed. Identifying and understanding a destination's visitor markets involves consideration of the following points:

- It is important to understand not only who the current visitor markets are but the preferred future target market/s for that destination as highlighted in the Grampians region where market research identified the opportunity to reposition the destination in order to attract the preferred target market;
- The development of a strategic direction for a destination should take into consideration both the current and future visitor markets to ensure that both short-term and long-term sustainability goals are achievable;
- Market segmentation is important in identifying different characteristics and demands of visitor markets and to assist in the identification of a destination's preferred target market/s as demonstrated in the Tennant Creek and Barkly region where market research and segmentation identified the self-drive market as the 'ideal' visitor market for the region;
- Market segmentation can be undertaken based on visitor demographics, behaviours, preferences and interests. The aim of better understanding a destination's current and future visitors is to get the best match between the aspirations and expectations of visitors, the host community's aspirations and the potential of the destination. For this reason psychographic segmentation (attitudes and values) is becoming increasingly used to find the perfect match.
- Identification of the preferred target market of a destination should be based on an assessment of the market segments against the destination image, stakeholder vision and goals, product and experience offering;
- Understanding a destination target market's needs, behaviours, characteristics, preferences and decision-making processes is important in developing appropriate strategies for destination development and marketing.

### **Destination Management Tip**

Social trend analysis can be used to identify future visitor demands and potential new target markets for a destination.

The Sustainable Tourism Cooperative Research Centre has an extensive body of research into understanding consumer choice and behaviours and the impact on identifying appropriate visitor markets. Research into best practice of regional destinations in 'Sustainable Regional Tourism Destinations Project' showed that tourism destinations must understand the history and future direction of the consumer marketplace and the position of their destination in that marketplace. For further information on market research please see the 'Market Research and Insights' section. For further information on specific market segments please see the 'Destination Products and Experiences' section.

## *The Changing Environment*

The tourism industry operates in a constantly changing environment that is influenced by a wide range of global, national, regional and organisational trends. An understanding of the changing environment should guide destination planning and management. An analysis should involve consideration of the:

- Internal Environment – including an assessment of the strengths and weaknesses of the destination, access to human resources and funding, understanding of the stakeholder network, the destination life cycle, important issues and challenges, and the development potential and attractiveness of the destination;
- External Environment – including an assessment of the macro and micro environment trends (economic, political, social and environmental) at a global, national and regional level that may impact on the destination. This includes identifying future threats and opportunities, analysis of the competitive attributes of the destination and potential competitors.

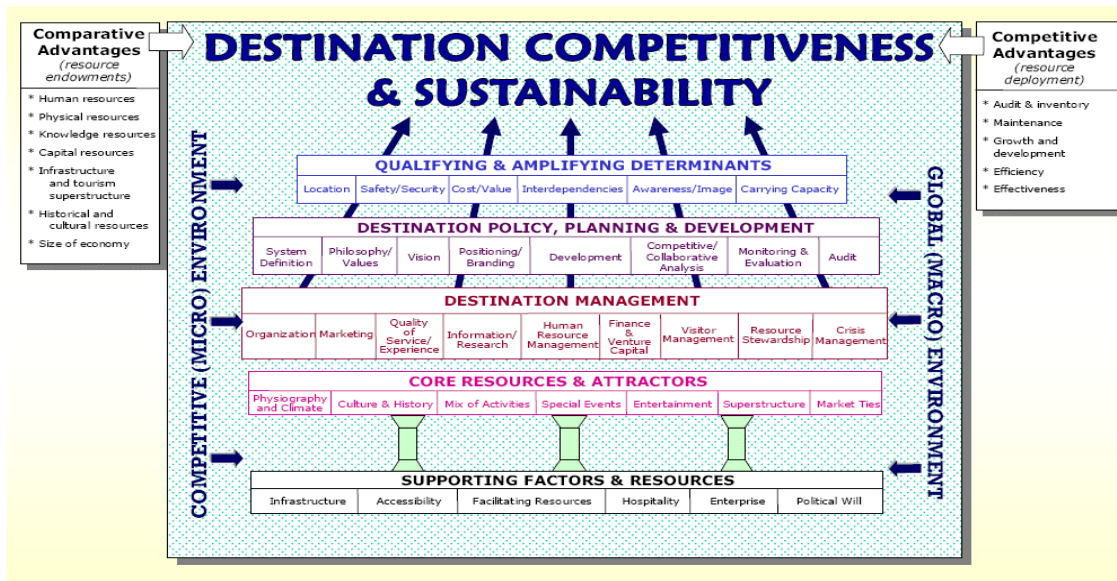
### **Destination Management Tip**

Social trends such as the use of technology and attitudes towards the environment are a major driver of tourism consumer preferences.

Three important research programs have been completed by the Sustainable Tourism Cooperative Research Centre to assist in better understanding a destination's operating environment:

- 'Modelling Destination Competitiveness'
- 'Megatrends underpinning tourism to 2020; Analysis of key drivers of change'
- 'Local Government Pathways to Sustainable Tourism'

The Destination Competitiveness and Sustainability model found in 'Modelling Destination Competitiveness' can be used to assess the external macro and micro environment and the internal competitive attributes of a destination. This assessment forms a key part of developing appropriate strategies for destination development, management and marketing.



Source: Ritchie, J.R.B. and G.I. Crouch (2003). *The Competitive Destination: A Sustainable Tourism Perspective*, CABI Publishing, Wallingford, UK.

The 'Megatrends underpinning tourism to 2020; Analysis of key drivers of change' report identifies key global and national factors and trends that are likely to impact on the competitiveness of tourism destinations. Proactive and innovative approaches are required to negate these potential challenges and remain competitive.

The STCRC's 'Local Government Pathways to Sustainable Tourism' workbook provides a framework for undertaking a Tourism Health Check to assessing a region's readiness to participate in tourism and destination management, taking into consideration the internal and external environment.

### *Destination Products and Experiences*

Visitors choose destinations from within their 'preference set' on a range of influencing factors, the range of products and experiences is one of the most important. For this reason it is important to ensure that product and experience development is matched with visitor demand. Without appropriate planning for tourism product development it may be difficult for a tourism destination to remain competitive for its target markets. Research into successful planning for tourism products development has shown that:

- Understanding supply and demand for products and experiences within a destination ensures that product development is appropriate, and is likely to be profitable and sustainable in the long-term;
- A tourism product and experience audit can assist with assessing the current supply of tourism-related assets within a destination, while market research on visitor demand and preferences will provide insights into current and future needs of visitor markets;

- A gap analysis can be used to identify gaps between supply and demand and develop key product development opportunities for a destination. Tourism Opportunity Plans developed in regions across Queensland use product audits, market research and stakeholder consultation to identify gaps between existing and future supply and demand for a destination;
- Mapping tourism product distribution across a destination can assist in identifying specific tourism precincts and areas for future development and visitor dispersal;
- Identification of themes in tourism products and experiences can assist in the development of tourism clusters or precincts to attract and retain visitors as demonstrated in the development of the Dig the Tropic trail, a cross-regional collaboration to link geotourism themed attractions and experiences;
- Tourism product and experience development should aim to provide the destination with a point of difference or competitive advantage and be aligned with the values and goals of the destination and its stakeholders;
- A tourism destination's products and experiences must constantly evolve and innovate to ensure that the demands and needs of visitor markets are consistently met;
- Opportunities for product development are commonly found in redeveloping or refreshing existing products or experiences, including festivals and events, rather than new development, as seen in the success of the Hunter Valley, where entrepreneurial operators are value adding to the visitor experience through packaging products and experiences.

### **Destination Management Tip**

A Tourism Opportunity Plan is an excellent way to engage tourism community partners and agree on innovative new products and experiences and identify actions and responsibilities for implementation.

In-depth analysis and planning for tourism products and experiences is required prior to investment in development. For more information on the development of tourism products and experiences please see 'Destination Products and Experiences' in the Destination Development section.

## *Contribution of Tourism*

Tourism is a dynamic and pervasive industry that provides a range of benefits and value to organisations, communities and regions that participate in the industry. Tourism can provide value for a destination in a number of ways:

- Economic – increased and diversified economic activity; flow-on economic benefits through a community; stimulus for economic development and investment;
- Social / Cultural – enhanced quality of life, community development, employment and

### **Destination Management Tip**

Assessing and communicating both economic and non-economic impacts provides a more holistic view of the value of tourism and better informs sustainable tourism management decisions.

- income, conservation of cultural heritage, increased amenity, community pride;
- Environmental – awareness of environmental significance, conservation of natural and built environments, implementation of sustainable practices.

Many destinations have previously focused only on the economic value of tourism. However integrating both economic and non-economic impacts provides a more holistic view of tourism and better informs destination management decisions. Understanding and communicating the value of tourism within a community is important in order to:

- Engage stakeholders, including governments, investors, businesses and the community, in understanding and recognising the importance of tourism within the community;
- Ensure stakeholder commitment to tourism and destination management;
- Link economic and community development to sound and sustainable tourism practice;
- Engage social, political and cultural capital to enhance the value of tourism in a destination.

A number of tools have been developed to assist destinations to measure and communicate the economic, social and environmental value of tourism. What is clear from the research is that a consistent, transparent and robust method is needed and that tourism should be considered in the context of other industries in areas such as contribution to Gross Domestic Product, Quality of Life and environmental sustainability. More information is provided below about assessing the economic, social and environmental value of tourism to destinations, as well as lessons on communicating the value to the community and stakeholders.

### **Economic Contribution**

Methods of understanding the economic contribution of tourism occur in many forms, from robust economic modelling to estimates of visitor expenditure. While data availability, resolution and reliability will differ in each destination, below are some suggested methods to measure the economic contribution of tourism.

Measuring the contribution of 'tourism' as an industry within existing economic models of contribution to Gross Domestic Product (GDP) through the creation of Satellite Accounts where the tourism inputs are defined.

The Sustainable Tourism Cooperative Research Centre (STCRC), through its 'Prosper' research program found that these modelling approaches use either input / output or Computable General Equilibrium (CGE) modelling tools are less accurate in regional areas and can be supplemented by:

- Primary data collection on visitor expenditure and flow-on effects
- Cost-benefit analysis of individual tourism projects; and
- Dedicated multiplier analysis to measure flow-on impacts.

### **Destination Management Tip**

Finding the best methods to measure the economic contribution of tourism in your destination should be based on the availability and reliability of the data. Inaccurate data creates unreliable forecasts.

While less statistically reliable, many destinations use national estimates of expenditure and job creation and apply them to estimated local visitation.

A STCRC report, developed in conjunction with the Centre for Regional Tourism Research provides a summary and analysis of the key types of economic impact studies and their applicability and relevance for different tourism regions. The report, 'A Guide to Assessing the Economic Value of Tourism in Regions' identifies the recommended use of each model and the information requirements to undertake the study.

### **Social and Environmental Value**

Understanding the social and environmental impacts (positive and negative) of tourism remains a challenging for tourism stakeholders today. Tourism is often claimed to provide significant value in terms of community development, environmental benefits and other cultural / social benefits, however many of these are not measured and/or reported. Measurement is vital to be able to communicate the value of tourism, including economic, social and environmental value, and to gain community, government and industry support and commitment to tourism in a destination.

### **Destination Management Tip**

Communicating more than the economic value of tourism is central to gaining community support. The STCRC kit for 'Promoting Awareness of the Value of Tourism is an important tool for communicating with stakeholders.

The 'Prosper' model developed by the Sustainable Tourism Cooperative Research Centre (STCRC) uses an indicators approach to assessing economic, social and environmental value of tourism in a destination. The model developed a set of quantitative and qualitative indicators that was applied to a case study region in order to assess the value of tourism at a regional level and help raise community awareness of tourism. Aside from economic value, tourism can make contributions to a destination including:

- Industrial contribution – business investment;
- Social contribution – community participation, civic pride;
- Municipal contribution – infrastructure management, urban planning;
- Cultural contribution – maintenance of regional image, heritage and cultural resources;
- Capacity contribution – partnership establishment, data collection, cooperative ventures;
- Environmental contribution – preservation of natural environments;
- Tourist contribution – visitor numbers and satisfaction

Research undertaken by the STCRC in conjunction with the Centre for Regional Tourism Research, developed a Resource Kit for regional tourism destinations to actively promote and communicate the value of tourism to stakeholders. 'Promoting Awareness of the Value of Tourism; A Resource Kit', identifies key strategies for communicating the value of tourism:

- An active public relations plan can promote understanding and positive opinion about tourism and its role in the community;

- Publicity and media can be generated through industry and public events, newsletters, meetings, collateral, internet or email campaigns and media advertising;
- Having access to relevant, specific and accurate data to underpin any communication with stakeholders;
- Linking distinctive natural and appealing aspects of tourism in a destination and their value to the community is essential.

## *Resource Capacity*

Tourism growth, along with population growth, creates growing demand for the natural and cultural assets of a destination. Understanding the social and environmental 'carrying capacity' of a destination is part of sustainable destination management. Planning for sustainability has become an imperative for destinations, responsive to growing concern within industry, community and consumers regarding environmental degradation, resource constraints and more recently climate change.

Developing a sustainable approach to resource management in a destination should:

- Forecast visitor demand to predict the social and environmental demands and impacts of tourism developments and growth;
- Assess a destination's existing environmental footprint and identify the tourism impact on and use of scarce natural resources;
- Engage stakeholders to actively participate in a more sustainable and resource efficient approach to tourism development and management; as demonstrated in the Great Ocean Road Sustainability Framework program that engaged industry stakeholders in identifying and implementing sustainability strategies and practices;
- Assess the environmental legislation and policies that influence destination development and resource usage including carbon taxes and development controls;
- Engage with government on developing appropriate land-use planning and development policies to ensure appropriate and sustainable design and development of tourism precincts and facilities, as demonstrated in the Byron Shire Council's consideration of the destination's image and values when developing land-use planning and development controls;
- Identify strategies and actions for implementing sustainable practices in destination development, as demonstrated by Hong Kong in its development of an Environmentally Sustainable Development Strategy for Tourism focusing on environmental management, sustainability training, information development and land-use planning for tourism development;
- Implement a performance monitoring program based on a defined set of sustainability indicators to review and monitor environmental impacts, as demonstrated in Queensland's Sustainable Regions Program that assess four regions against a set of environmental indicators and the subsequent development of an environmental action plan;

### **Destination Management Tip**

Environmental certification programs such as EarthCheck provide destinations and communities with an opportunity to measure and manage their environmental footprint against a set of indicators.

- Undertake environmental performance improvement through benchmarking performance against best practice; and
- Reporting on environmental and sustainability performance to all stakeholders including consumers.

Leveraging approximately \$260 million in research and the knowledge of more than 250 scientists from 16 leading universities, the Sustainable Tourism Cooperative Research Centre developed the Earthcheck program, an environmental benchmarking and performance system based on the principles of Agenda 21. The Earthcheck program provides destinations and communities with an opportunity to measure and manage their environmental footprint against a comprehensive set of indicators, benchmark results against industry best practice, report and achieve certification for performance.

### **Destination Management Tip**

Making the most of protected areas means considering visitor needs and aligning these with the management and conservation values of the area.

## *Natural / Protected Area Assets*

As consumers become increasingly environmentally aware and the trend towards outdoor / nature activities grows, the importance of managing a destination's natural assets has come into greater focus. While natural areas can be some of the most popular visitor attractions in a destination they are also some of the most fragile, requiring extensive planning and management to maintain and preserve. Research into the development of tourism products and experiences in natural areas has shown that:

- Tourism and protected areas can co-exist with appropriate planning for tourism product development to preserve the ecological and cultural values of the site. The EarthCheck Design and Operating Standard developed by the Sustainable Tourism Cooperative Research Centre (STCRC) is used as a minimum requirement in many protected areas worldwide;
- A comprehensive impact assessment should be undertaken when identifying potential tourism development opportunities for natural areas, including the economic, social and ecological impacts and benefits. Continual assessment, such as that demonstrated by Kangaroo Island with its Leave Only Footprints environmental reporting program, is important for monitoring the impacts of tourism on the environment;
- Planning for tourism development in natural areas needs to take into consideration visitor interests and needs and matching visitor demands with the management and conservation goals of the site, accessibility, supporting facilities, interpretation and education;
- Strong partnerships with natural area managers, local government, industry operators and the community is essential for identifying tourism opportunities within natural areas and ensuring appropriate development and management. The partnership between the Department of Environment and Conservation, the Water Commission and industry in managing protected areas in the Tapestry Region in Western Australia is a best case example of a successful cooperative partnership.
- Protected area management in particular is a complex process, finding a balance between visitor experiences and enjoyment, maintaining the conservation values of the area and ensuring appropriate visitor management practices;

- Recognising the potential impacts of climate change on natural areas is important for long-term planning and strategic direction.

In-depth analysis and planning for the development of tourism in natural areas is required prior to investment in development. For more information on the tourism development in natural areas please see 'Protection of the Natural Environment' in the Destination Development section. The Sustainable Tourism Research Centre has an extensive body of research on development and management in protected areas which discussed in further detail in the dedicated 'Nature and Culture' section of the portal.

### *Statutory and Planning Environment*

Tourism involves a complex interaction between a variety of sectors including economic development, infrastructure development, transport, protected area management, community development, sport and recreation, heritage management and hospitality. For this reason, the industry is faced with a wide range of planning and environmental regulations and frameworks. Strong public / private sector partnerships are essential to providing the tourism industry with the opportunity to influence and inform tourism policy and planning and provide the certainty needed to encourage investment.

#### **Destination Management Tip**

There are over 175 Acts in Australia relating to tourism. Understanding the statutory and planning environment is essential for long term sustainability. The STCRC report [\*'The Legal Basis for State and Territory Tourism Planning'\*](#) provides a summary of relevant tourism legislation.

Partnerships between industry, the community and government can play an important role in:

- Ensuring that planning and development for tourism is aligned with the needs of all stakeholders including residents, visitors, industry and government;
- Attracting private investment to a destination requires a planning and regulatory environment that addresses issues such as regulatory barriers, taxation and multi-layered approval and decision making processes;
- The development of tourism master plans for a destination to provide the necessary zoning and development opportunities for investment in tourism facilities and precincts;
- The incorporation of tourism considerations into design guidelines for transport planning, land-use planning, precinct development and zoning. Noosa provides a best practice example of a region that was able to partner with government to inform the development of appropriate land-use planning and development controls to ensure the preservation of the destination's tourism character and appeal.

The Sustainable Tourism Cooperative Research Centre (STCRC) has examined both the ingredients of successful public / private partnerships for sustainable tourism and the legal basis for tourism planning. Further information on the public sector role in tourism development can be found in the 'Public Infrastructure' section while information on private sector investment is provided in the 'Private Infrastructure and Investment' section.

The STCRC have also explored adaptive and mitigation strategies for the tourism industry to respond to climate change policies and regulations, culminating in the

'Earthcheck' building and precinct planning, design and operating programs. Implications of climate change policies include mandatory restrictions, carbon taxes and emissions trading schemes. Further information on the STCRC's research into climate change and tourism in Australia can be found under 'Climate Change'.

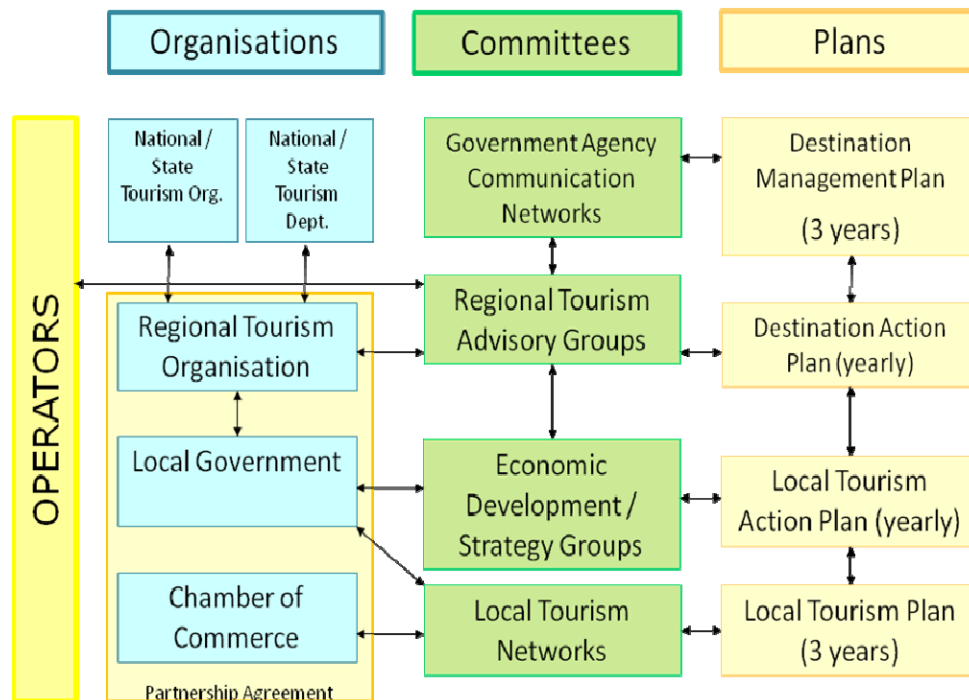
### National and State Policy and Plans

Tourism policy and planning at a National and State level provides a framework for tourism development and management at a destination or local / regional level. Strategic planning for tourism at a destination level must align and integrate with national and state policy and plans as well as local planning frameworks.

As identified in the 'Local Government Pathways to Sustainable Tourism' toolkit developed by the Sustainable Tourism Cooperative Research Centre, the development of a regional governance map can assist in understanding the tourism planning framework in which a destination operates. A governance map helps to identify linkages between stakeholders, decision-making and governance structures and the plans and policies at a National, State and Local level that will impact on the strategic planning for tourism in a destination. An example of a governance map is provided below.

**Destination Management Tip**

Governance mapping can be a valuable tool in linking National, State, Regional and Local planning and identifying key areas for action and partnership. The Local Government Pathways to Sustainable Tourism can help.



**Source: Local Government Pathways to Sustainable Tourism, Sustainable Tourism Cooperative Research Centre, 2009**

Planning for tourism in a destination must not only integrate with National and State tourism strategies and policies but also consider other relevant plans such as economic development, infrastructure, environment, sport and recreation and transport. For further information on the planning environment in which tourism operates please see the section on 'Statutory and Planning Environment'.

## Planning Process

The fundamental principle of the destination management process is that it involves bringing together stakeholders to clearly articulate the strategic direction and actions for the development, marketing and management of a destination for the future. The planning process should be informed by the findings of the 'Situation Analysis' phase of destination planning to ensure that all existing knowledge is considered and incorporated into the strategic direction of the destination. Lessons for an effective destination planning process include:

### Destination Management Tip

State and National Tourism Organisations provide a wide range of resources and information for developing a strategic plan at a destination level.

- Strong leadership is needed from destination managers and local tourism champions to ensure stakeholder participation and commitment;
- Development of a comprehensive stakeholder engagement process and clear definition of stakeholder roles and responsibilities in order to leverage skills and experience and provide focus for planning and management;
- Development of a shared stakeholder vision for tourism and destination management in the destination over time to agree a common direction and values for the destination;
- Development of strategic planning documents that provide a long-term direction for the destination's development, marketing and management as well as short, medium and long-term actions to achieve the destinations vision. Strategic planning documents include:
  - A long-term Strategic Plan identifying the strategic priorities and direction for the destination including prioritisation of actions and strategies;
  - A Research Plan that identifies the data and information required by destination managers to make informed planning and strategic decisions;
  - A Risk Management Plan that outlines a framework and processes for identifying and responding to tourism risks and crises that may impact on a destination;
  - A Strategic Marketing Plan that identifies the marketing strategies and activities to successfully attract target visitor markets and influence destination and product choice.
  - A Festivals and Events Plan that identifies opportunities to bring locals and visitors together to celebrate the unique and special features of a destination.

According to the 'Achieving Sustainable Local Tourism Management Phase 1 – Practitioners Guide' developed by the Sustainable Tourism Cooperative Research Centre, good planning processes are characterised by:

- Clear planning and management processes;
- Reliable information;
- Adaptive management approaches;
- Information management and accessibility;
- Encouraging collaboration;
- Sharing information and experiences;
- Good communication strategies.

### *Destination Leadership and Coordination*

With such a wide range of stakeholders with an interest or stake in tourism for any one region, it is essential to have strong stakeholder coordination across a destination. Coordination and communication require leadership. Having strong and committed leadership within a destination is vital to:

- Encourage stakeholder commitment and participation in tourism;
- Provide a focused strategic approach to tourism;
- Promote a shared tourism vision for the destination;
- Develop networks and partnerships with stakeholders;
- Attract investment through public / private partnerships;
- Identify roles and responsibilities for stakeholders;
- Coordinate stakeholders and focus resources;
- Develop an effective destination management structure;
- Develop clear governance and operational structures;
- Identify strategic opportunities for destination development and marketing.

Coordinated action between public and private organisations allows for more successful tourism planning, management, marketing, product development, training and education. Public / private partnerships allow for communication between all stakeholders and assist in identifying strategies and mechanisms to achieve sustainable tourism development. These partnerships must be developed for mutual benefit to be effective.

Further information on the development of an effective destination management structure and governance framework can be found in the 'Destination Management Structure' section. For further information on clearly defining the roles and responsibilities of stakeholders and destination leaders and the development of a shared tourism vision, please use the links below.

### **Destination Management Tip**

Successful destinations are supported by effective Regional Tourism Organisations and/or Local Tourism Organisations as well as having the support of their Local and State and National Government, industry and community.

### *Leadership & Roles*

Successful destinations have strong leaders. Local destination leaders or 'tourism champions' create a common sense of purpose and provide a strategic focus for a destination. Effective leadership also leads to clearly defined roles and responsibilities. Stakeholders in the tourism industry have a wide range of interests, skills, knowledge

and expertise, and clearly identifying their roles is important in leveraging the individual skills of each stakeholder.

A landmark report by the Sustainable Tourism Cooperative Research Centre identifies best practice strategies for regional tourism destinations in regard to stakeholder participation and roles. The 'Sustainable Regional Tourism Destinations Project' report highlights the key leadership roles of the following stakeholders in best practice regional destinations:

### **Destination Management Tip**

Clearly identifying the roles of stakeholders within the destination management framework is important in leveraging the individual skills of stakeholders and having a clear set of actions and responsibilities for each stakeholder.

#### **State or Territory Tourism Organisations**

- Provide strong leadership and strategic tourism expertise to support local / regional destinations;
- Facilitate strategic destination planning processes;
- Assist with support and advice on how to lobby for investment and prepare grant applications;
- Develop and implement strategic marketing campaigns;
- Facilitate cooperative network development.

#### **Regional and Local Tourism Organisations**

- Provide visionary leadership;
- Develop a clear vision and values;
- Foster cooperation between local and regional industry operators;
- Develop effective board structures and clear roles and responsibilities of members;
- Promote transparency and accountability in decision-making.

#### **Local Government**

- Work cooperatively with local and regional tourism organisations;
- Initiate a dedicated tourism committee within Council;
- Initiate a tourism strategy planning process that is linked with local government policy and plans;
- Provide financial support for visitor information centre development and infrastructure development;
- Develop policies to support sustainable tourism development.

There are a wide range of additional stakeholders that play important roles in successful destination planning, development, management and marketing. Please see the 'Stakeholder Representation and Engagement' section for more information.

#### **Visioning**

A tourism vision statement for a destination is essential for engaging stakeholders with a common direction for destination management. A tourism-specific vision will allow for an agreed focus for how tourism in a destination should be planned, developed, managed and marketed over time. A vision statement is an aspirational statement that

provides clear decision-making criteria for future development and management. An effective vision statement:

- Provides the basis for the strategic direction of the destination;
- Identifies the core values and principles of the destination in the long-term;
- Aligns with destination's values and culture;
- Aligns with stakeholder goals and ideals;
- Focuses on long-term aspiration and sustainability;
- Is clear and unambiguous;
- Provides a memorable and engaging focus;
- Is realistic in its aspirations and goals.

### **Destination Management Tip**

A visioning exercise can assist stakeholders in discussing and identifying a clear and agreed tourism vision for a destination.

The Gold Coast Tourism Visioning Project and the Sustainable Tourism Vision for North Stradbroke Island Project provide best practice examples of the development of a stakeholder agreed and relevant tourism vision for a destination. In the 'Local Government Pathways to Sustainable Tourism' resource, the Sustainable Tourism Cooperative Research Centre provides a framework for undertaking a tourism visioning exercise with stakeholders. A visioning exercise should include consideration of:

- The timeframe of the vision;
- Who the vision is for and who needs to be involved in the development of the vision statement;
- Development of short future tourism scenarios - a description of the preferred future tourism destination;
- Grouping of stakeholder future tourism scenarios to develop goals and values for the destination;
- Identification of things that are not aligned with the destination's goals and values;
- Developing of short phrases that can form a vision based on the future scenario themes, goals;
- Drafting of vision statements for review and discussion;
- Review of vision statement against goals and future scenario to ensure consistency.

A vision statement should form the basis for the strategic planning process of destination management. For more information on strategic planning please see the 'Strategic Plan' section.

## *Stakeholder Representation and Engagement*

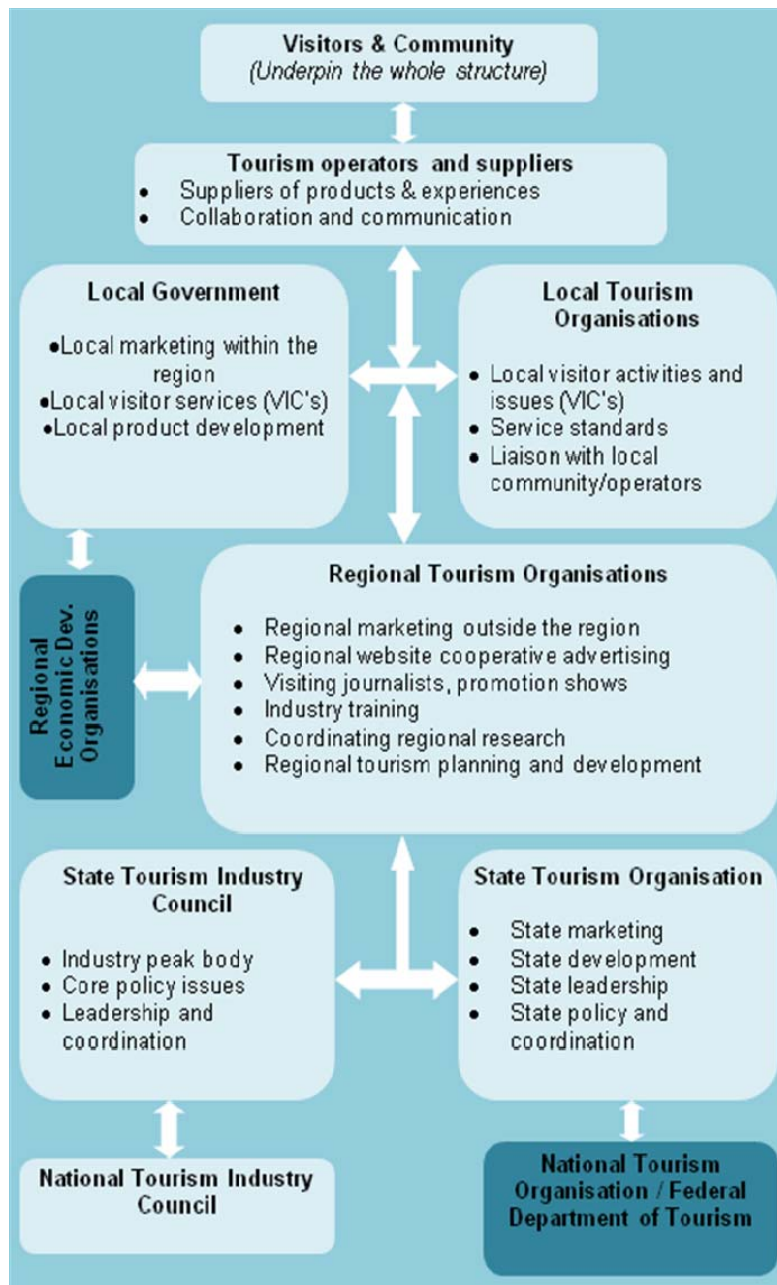
The tourism industry comprises a complex network of stakeholders and groups that have an interest in the development, management and marketing of tourism for a particular destination. The support, commitment and cooperation of these stakeholders to tourism in a destination is essential for the long-term sustainability of the industry. Identifying and understanding who the stakeholders in a destination are and what their interests are is important in developing an appropriate engagement process. Based on research, a stakeholder engagement process for a destination:

- Recognises the concerns and goals of all tourism stakeholders is important for planning, decision-making and developing mutually beneficial strategies and actions;
- Engages stakeholders based on their interest, skills and expertise to ensure a comprehensive basis of knowledge for planning;
- Understands and communicates the value of tourism, including economic, social and environmental, to stakeholders is important to gain support and participation in destination planning and management;
- Develops a shared understanding of tourism in a region, including the values and ideals of the destination is important for an agreed tourism focus;
- Develops an agreed vision that provides a focus for future planning, development and management of tourism in the destination;
- Identifies clear roles and responsibilities of all stakeholders. This could be an informal process or through the development of partnership agreements or MoUs;
- Identifies the governance structure for destination management as an important framework that clearly outlines communication, reporting and decision-making processes.

### **Destination Management Tip**

A stakeholder network diagram can assist in identifying who is who within a network and inform the stakeholder engagement process.

Tourism stakeholders groups include industry operators, government departments and associations, visitors, the community, investors / developers, land owners, industry associations, tourism-related organisations, community and environmental groups. The Sustainable Tourism Cooperative Research Centre's 'Local Government Pathways to Sustainable Tourism' workbook provides an example of the tourism stakeholder network in a region and the interactions between stakeholders (as below). This workbook also provides a best practice case study of North Queensland in their development of a tourism engagement strategy to improve coordination between stakeholders in managing the destination.

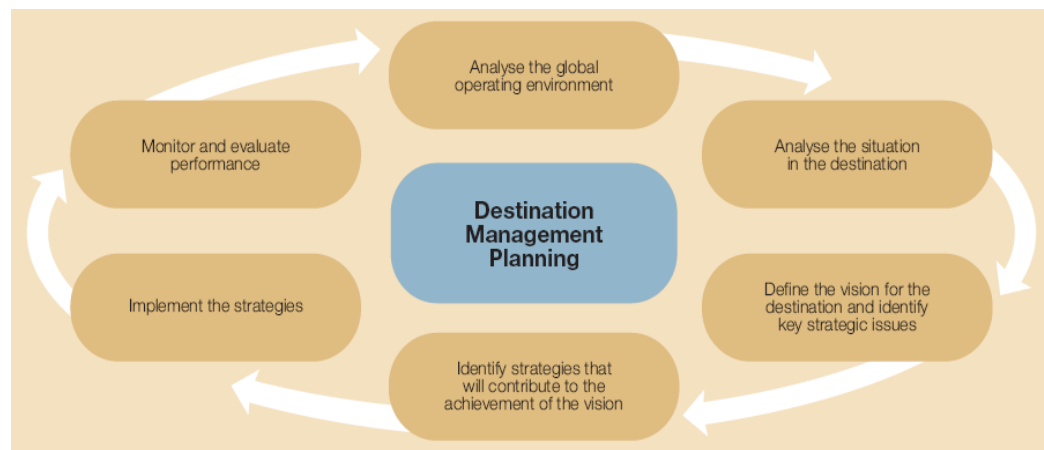


Source: Local Government Pathways to Sustainable Tourism, Sustainable Tourism Cooperative Research Centre, 2009

## Strategic Plan

The development of a strategic tourism plan for a destination is an articulation of the strategic priorities and direction that have been identified by stakeholders for the planning, development, management and marketing of a region. Strategic Plans for destinations have been called Destination Management Plans, Tourism Action Plans or Sustainable Tourism Plans in different regions across the world. A strategic plan for destination management is essential for the long-term success and sustainability of a destination. As highlighted in the case of the Leeds region in the United Kingdom, while having a strategic plan for tourism will not solve all of a destination's challenges, not having a strategic direction will certainly cause more issues in the future.

Developing a successful strategic plan for tourism requires taking a comprehensive destination management approach. A Destination Management Planning Model developed by Tourism Queensland provides a process for developing a strategic plan for a destination.



**Source: Queensland Tourism Strategy, Tourism Queensland 2006**

A successful strategic plan should:

- Be developed based on an assessment of the situation analysis phase of planning, including consideration of visitor markets, operating environment, resource capacity, existing products and experiences and statutory and planning environment. As a destination with relatively low market share, the Hunter Valley embraced best practice when they realigned their strategic focus following extensive research into potential new visitor growth markets and consumer needs;
- Be developed as a collaborative process, engaging a wide range of stakeholders who provide input into the developing the strategic direction for a destination;
- Ensure alignment with the vision of the destination, the destination's image and the values of stakeholders;

### Destination Management Tip

Strategic destination planning is a cyclical process that requires ongoing monitoring and review and the flexibility to adapt to changing conditions.

- Identify and prioritise key strategies and actions for future destination management, development and marketing; as demonstrated in the strategic approach of the Daylesford region, developing a suite of interrelated tourism plans including a Strategic Plan, Action Plan and Stakeholder Communication Plan;
- Identify clear stakeholder responsibilities and timelines for the implementation of strategies and actions;
- Establish clear goals and measures for achieving the vision of the destination;
- Establish a regular review and monitoring program to assess the implementation of the strategy;
- Be developed as a 'living' document that can be adapted and updated as the operating environment changes; as demonstrated in Byron Shire and its commitment to regular review of their Tourism Strategic Plan against external and internal changes.

Additional best practice case studies of regional tourism destinations can be found in the Sustainable Tourism Cooperative Research Centre's 'Sustainable Regional Tourism Destinations' report.

## *Research Plan*

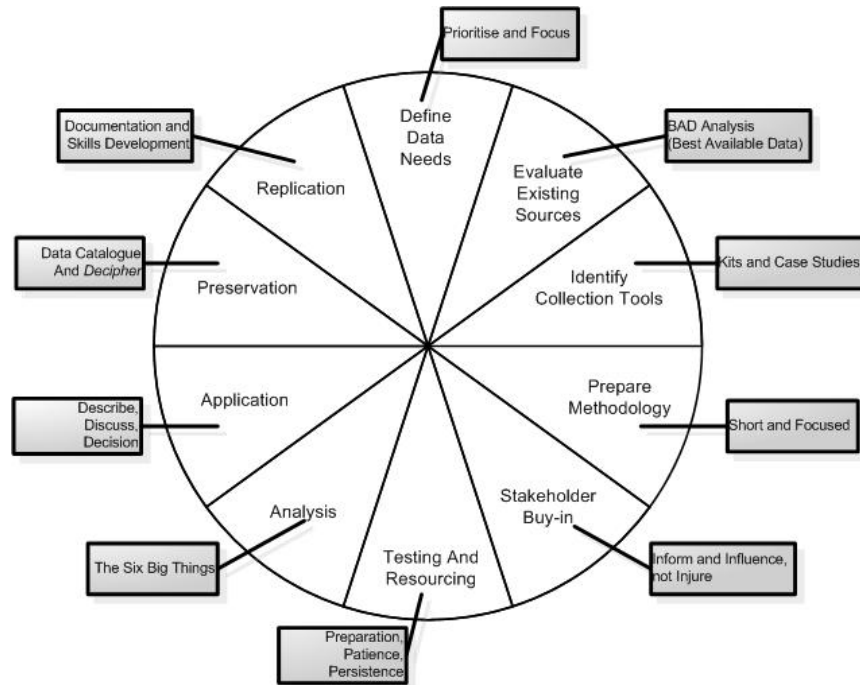
Effective destination management and strategic planning needs to be based on relevant and up-to-date data and information. Destination managers need access to data and information on visitor markets, environmental trends, product supply and availability, resources, opportunities and challenges and potential risks. Destinations that have established research and data collection systems to support decision-making are better able to plan effectively and adapt to changing market conditions. An effective research plan or program should identify:

- Data and information required to support destination management and decision-making;
- Existing data sources that are easily accessible by the destination as well as additional data collection that is required to fill any gaps in existing data sources. The Noosa Tourism Monitor provides an example of a research program that draws on existing available data from government, industry and sector bodies as well as their own local visitor survey data and accommodation information;
- Data collection tools and methods that can be used to collect and collate data and information;
- Processes for data use and analysis;
- Frequency of data collection and resourcing requirements;
- Data management processes including the use of information management systems;
- Communication methods to distribute relevant data and information to stakeholders such as the publishing of results from the Tourism Optimisation Management Model (TOMM) implemented by Kangaroo Island.

### **Destination Management Tip**

State and National Tourism Organisations provide a number of regular research publications at a regional and destination level that provide valuable information without requiring data collection.

Existing research and data sources are commonly focused at a State or National level rather than at a local or regional level however Tourism Research Australia does produce basis visitation data at a Local Government Area level periodically. The importance of local level data collection has become increasingly evident over the last decade as a more relevant data source for tourism management at a destination level. One of the landmark reports by the Sustainable Tourism Cooperative Research Centre, provides a guide to developing and implementing small area tourism data collection and analysis. The 'Know Your Patch' guide outlines the process in identifying local level data needs, developing sourcing methodologies and collection and analysis of data.

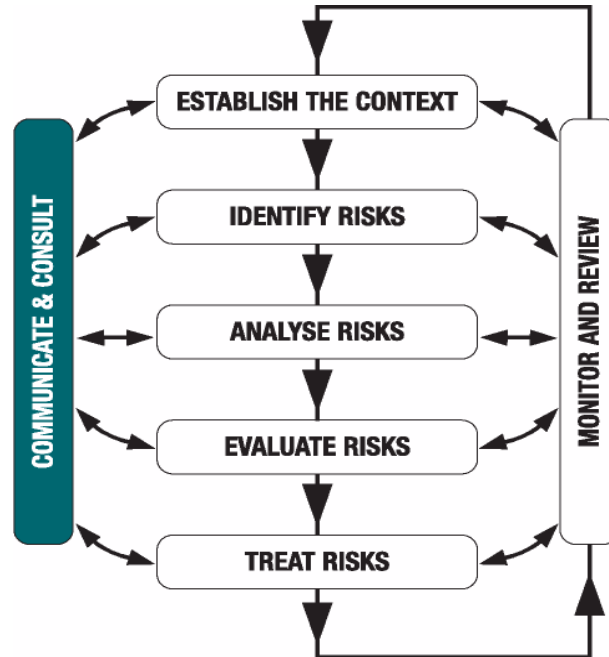


**Source: Know Your Patch; A guide to small area tourism data collections in Regional Australia, Sustainable Tourism Cooperative Research Centre, 2004**

### *Risk Management Plan*

The tourism industry operates in a rapidly changing environment that is made up of many interrelated sectors. For this reason, unforeseen risks and crises can significantly impact on a destination's short and long term sustainability. While each destination is unique and will face different challenges and issues, there are common areas of risk management which must be addressed by all destinations. One of the landmark reports by the APEC International Centre for Sustainable Tourism in collaboration with the

Sustainable Tourism Cooperative Research Centre (STCRC), produced a comprehensive risk management guide for managing crises in tourism. The 'Tourism Risk Management Guide' provides a framework for destinations undertaking a tourism risk management process and developing a risk management plan:



**Source: Emergency Management Australia, 2004 in Tourism Risk Management; An Authoritative Guide to Managing Crises in Tourism, APEC International Centre for Sustainable Tourism, 2006**

An effective risk management strategy should include the development of strategies for preventing / mitigating identified risks, having processes and plans in place for potential risk occurrences, identifying processes for responding to crises when they occur and identifying actions for recovery following a crises. The Tourism Tropical North Queensland Tourism Crises Management Plan provides a best practice example of a successful risk management plan. The success of the plan can be attributed to the extensive planning process and stakeholder engagement undertaken in developing and implementing the plan.

#### **Destination Management Tip**

Destinations that are able to respond and recover quickly from a crisis are those that have clearly defined risk management plans and allocated roles and communications structures.

One of the biggest risks facing the tourism industry today is climate change. Climate change will directly impact on Australian tourism and on the economic benefits that tourism generates through the loss or degradation of tourist attractions, the costs of adaptation, and replacement costs for capital infrastructure. Destinations must recognise climate change as a significant risk to tourism in their destination and develop strategies to adapt and mitigate negative impacts. A major report developed by the STCRC, 'The Impacts of Climate Change on Australian Tourism Destinations; Developing Adaptation and Response Strategies', provides case studies of several

Australian tourism destinations, describing the potential impacts of climate change on the destination and highlighting actions to reduce these impacts over time.

## *Strategic Marketing Plan*

Successful marketing can influence a potential visitor's destination choice, itinerary planning process and choices, and also encourage word-of-mouth referrals. A Marketing Plan sets the framework and direction for all marketing activities for a destination including market research, brand development and management, advertising and promotion, sales, distribution and cooperative marketing opportunities. The development of a successful strategic marketing plan should:

- Determine the existing and forecast market characteristics for the destination including visitor markets and operating environment;
- Identify Trends and influences that may impact on the target markets of a destination, in their travel preferences and choices;
- Understand the visitor markets' information-searching and decision-making process and factors that influence destination choice and product selection;
- Engage stakeholders in a collaborative planning process to develop an agreed strategic direction and vision for marketing in the region; as demonstrated by Noosa's award winning approach to the development of industry partnerships to guide strategic tourism marketing in the region;
- Identify marketing strategies and techniques that are aligned with the destination's target market segments, vision and values; as highlighted in the marketing strategy of the 'Australia's Hunter Valley' which divided the region into precincts based on the type of tourism experiences available to target different consumer segments;
- Recognise the increasing trend toward e-marketing and use of ICT technologies for promotion and sales and the impact of this trend on a destination's target market and marketing techniques;
- Develop clear timelines and responsibilities for actions identified in the plan;
- Develop key performance indicators to monitor and review the implementation of the plan;
- Link the destination marketing plan to other regional and state plans;
- Identify funding opportunities including cooperative marketing programs, industry participation and alignment with State marketing programs.

### **Destination Management Tip**

A marketing plan should be underpinned by a clear definition of the destination's brand and positioning. All marketing efforts should be loyal to this brand to ensure consistency and create brand awareness.

### **Destination Management Tip**

State and National Tourism organisations provide a wide range of resources and support for the development of events and festivals at a destination level.

For further information on the development and implementation of marketing activities, including undertaking market research, developing a destination brand and implementing strategies please see the 'Destination Marketing' section.

## *Festivals and Events Plan*

Successful festivals and events bring locals and visitors together to celebrate the unique and special features of a community. Festivals and events create new bonds and strengthen the fabric of the community and can deliver measurable economic, social and even environmental benefits. If festivals and events grow in an unmanaged way they can be seen to 'take-over' a community and issues such as parking, noise, crowding, dislocation of locals, and rising prices can dominate the communities view of an event.

A Festivals and Events Plan aims to ensure the positive impacts are maximised and the negative impacts (such as crowding and noise) are mitigated through an inclusive process of exploration and partnership building with the community and local industry. A successful Festival and Events Plan should include:

- An audit of existing events (number, patronage, timing, theme, mix of locals and visitors, economic return, etc)
- Community and industry perceptions of existing events
- Opportunities to grow existing events or attract new events
- Strategies to maximise the benefits and reduce the impacts
- Forecast patronage levels and the impact on local infrastructure
- Input to future planning which aims to mitigate negative impacts
- Evaluate local and state government regulations and policy in relation to staging events

Most State, Territory and National tourism bodies provide information on successful festivals and events that can be downloaded from their websites. For further information on the successful management and monitoring of events and festivals please see the section on 'Events / Festivals' in the Implementation phase of destination management.

## **Ongoing Engagement**

Successful tourism at a destination level relies on a partnership between a wide-range of stakeholders. Many destinations succeed in gaining input and having stakeholders participate in 'Destination Planning', however, few manage to keep those stakeholders engaged throughout the 'Implementation' and 'Destination Performance' stages.

Australia's Long-Term Tourism Strategy recognised this challenge and has formed multi-sectoral working groups each with a responsibility for implementation of different strategies to ensure stakeholders remain engaged.

Lessons for successful ongoing engagement of stakeholders include:

### **Destination Management Tip**

Stakeholders need to be engaged throughout the entire destination management process, not just in the planning phase.

- Be specific: having specific projects or strategies to address will keep stakeholders engaged. The Mackay Whitsundays RTIIP Implementation Group focused on a number of catalyst projects to focus stakeholders.
- Allocate funding: for implementation, including a Project Manager if possible, this will ensure progress continues and projects progress.
- Measure success and celebrate the wins: the Far North Queensland Economic Development Strategy from the late 1990's set the benchmark for ongoing engagement through an online reporting program showing progress on each initiative through a percentage completed progress bar until a project was completed with regular reporting both internally and externally on progress.
- Having strong leadership to continue to inspire progress at an operational level. The Lake Eyre Basin Ministerial Forum is an excellent example of leadership and ongoing engagement.
- Partnership Agreements: can help to formalise ongoing engagement, moving beyond simply having a responsibility allocated in a project plan.

## Implementation

'Destination Planning' is an iterative process, while developing, marketing and managing a destination happens concurrently and in an evolutionary way. Destinations don't noticeably move from one phase to another but rather move fluidly between planning and implementation. Implementing sustainable tourism outcomes is a delicate balance of developing without overdeveloping, marketing without over-promoting and managing without stifling the natural and dynamic social and cultural attributes of unique and vibrant destinations.

Memorable destinations get the right balance of natural, cultural and man-made features and make the most of their landscape and climate without threatening their sustainable future and work with the community to deliver economic, social and environmental benefits.

As a major employer worldwide, tourism can sustain viable communities and promote living cultures. As an industry that is primarily about bringing the customer to the product and experience (with the exception of virtual tourism), it faces a number of unique challenges including: community engagement and support, access, and public infrastructure investment. Consumer perceptions and expectations may also be influenced by factors outside the industry's control. In addition, destination management involves challenges in engaging diverse stakeholders involved tourism.

Over the past decade, over \$260 million has been invested by the Sustainable Tourism Cooperative Research Centre in understanding what factors influence sustainable implementation of destination planning, leading to vibrant, sustainable and memorable tourism destinations.

The three core elements in the implementation phase of destination management – Destination Development, Destination Marketing and Ongoing Management - are described further in the links below. Navigating down through these links also provides additional topic-specific information, tools and resources.

## Destination Development

A destination cannot promote products and experiences it doesn't have. Destination development is a continuous process of coordination and development of amenities, facilities, products and services that support host communities to deliver quality experiences for visitors and enhance residents well-being. Managing destination development is fundamental to successful 'Implementation' of tourism management; where destination managers and stakeholders put into action the priority strategies and plans developed during the 'Destination Planning' process. The destination development process should be informed by the 'Situation Analysis' and 'Planning Process' phases and monitored against clear KPIs throughout the 'Destination Performance' process.

The successful implementation of the destination development phase of destination management involves:

- Development is shaped by the planning scheme and approvals process of a destination which is a reflection of community aspirations for 'places'. Getting the right planning scheme is a giant leap towards encouraging sustainable tourism development;
- Development of an effective and collaborative destination management structure to facilitate stakeholder engagement and communication and guide development and management;
- Facilitation of a process to engage public and private sectors for investment in required tourism infrastructure and product, including:
- Identification of public infrastructure services and facilities demands, including consideration of host community and visitor needs;
- Planning for the development of appropriate public and private infrastructure and facilities to transport and distribute visitors to, and effectively throughout the destination;
- Development of tourism-related products and experiences that are aligned with core brand values and the needs of the visitor market segments of the destination;
- Development of tourism experiences within natural and protected areas, ensuring conservation values are maintained;
- Provision of visitor information services to encourage increased expenditure and satisfaction;
- Providing a forum to engage stakeholders in a proactive way to address key sector challenges for the destination, including:
- Ensuring high standards for tourism products and facilities to enhance the visitor experience;
- Developing a high quality labour market to deliver on visitor expectations and needs;
- Developing a strategic approach to the management of risk, visitor health, safety and security.

### Destination Management Tip

The Planning Scheme ultimately dictates the type and nature of tourism development and should be developed with tourism aspirations in mind.

Please use the links to find out more about the phases of destination development.

## Effective Destination Management Structures

The tourism sector is complex, incorporating a network of interrelated stakeholders and organisations, both public and private sector, working together. The success of a destination relies on a coordinated approach to the planning, development, management and marketing of a destination. A clearly defined destination management structure can provide destination managers and stakeholders with a place to negotiate sustainable destination development, ongoing management and effective destination marketing outcomes.

Lessons from around the world suggest that an effective destination management structure:

- Is a collaborative structure that combines the interests, skills and knowledge of 'stakeholders' across government, industry and the community, as highlighted in the Barossa Valley with the establishment of the Barossa Wine and Tourism Association bringing together a range of stakeholders to guide tourism planning, development and marketing;
- Develops a clear stakeholder agreed strategic direction for the development, management and marketing of tourism in a destination;
- Establishes an agreed 'vision' and image for a destination based on the values of the destination and its stakeholders;
- Establishes clear roles and responsibilities for all stakeholders across all elements of destination management and decision-making;
- Address the complexities of decision-making and approval processes by developing strategies and partnerships to minimise the levels of decision-making;
- Recognises that public-private partnerships are an efficient way to manage and promote destinations;
- Establishes cooperative arrangements with partners to ensure effective communication and collaboration. Partnership agreements or MoUs between stakeholders can be used to articulate the governance framework for managing a destination, as highlighted in Victoria's Geelong Otway Tourism's bottom up approach to destination management, establishing MOUs with Local Governments and Local Tourism Organisations and encouraging industry membership;
- Allows local tourism leaders to become destination champions, as in the case of Leeds in the United Kingdom where tourism champions encourage stakeholder participation, foster innovation and assist in the development of a committed and shared approach to tourism management.

### Destination Management Tip

An effective destination management structure has proactive input from government, tourism organisations, the tourism industry and the host community rather than managed by crises or ad hoc.

Additional case studies of best practice regions can be found in the Sustainable Tourism Cooperative Research Centre's (STCRC) 'Sustainable Regional Tourism Destinations Projects' report. Another of the landmark reports produced by the STCRC analysed the structure of the tourism sector in several regions across Australia. The report, 'The Network Structure of Tourism Operators in Three Regions of Australia', provides methodologies for assessing the relationships between tourism organisations

in a destination and how these relationships influence destination structure, information exchange and collaborative management.

## *Public Infrastructure*

### Meeting Visitor Needs

The development of appropriate public infrastructure is central to meeting visitor needs. Visitors use a wide range of public infrastructure during a trip including:

- Transport;
- Health facilities;
- Water, waste and energy;
- Recreational sites; and
- Public amenities and services.

The ease of access and use of these facilities can have a significant impact on a visitor's perceptions of a destination, their length of stay, overall trip satisfaction and ultimately their likelihood of repeat visitation or word-of-mouth referral. For further information on assessing customer expectations and satisfaction please see the 'Visitor Satisfaction' section.

### **Destination Management Tip**

A Tourism Opportunity Plan can assist destinations in identifying public infrastructure requirements for tourism and engaging the public sector.

### Assessing Supply and Demand (Resident and Visitor)

Visitors can put significant pressure on a host destination's public infrastructure, particularly in smaller regional communities where the proportion of residents to visitors at peak times is small. Forecasting community and visitor demands for public infrastructure and services is an important part of long-term planning and prioritisation. Most National and State tourism bodies have tourism forecast data and can provide guidance on future trends. Industry and government must work together to get a clear understanding of future demand, as highlighted in the case of Queensland's Agnes Water, where key infrastructure constraints for the region's growth were identified through partnerships between industry and the Local and State Governments. Public / private partnerships can also play a critical role in developing appropriate infrastructure for both visitor and community use and can encourage additional private investment. Please see the section on 'Private Infrastructure and Investment' for further information.

### Linking Economic Development and Tourism

While tourism growth in a destination does place pressure on resources and facilities, it can also provide the stimulus for economic development and the impetus for infrastructure development. In many cases, the role of tourism as a catalyst for economic development has gone unrecognised. This has been due, in part, to a lack of cohesion between government agencies responsible for critical infrastructure planning and those departments responsible for tourism. The introduction of a destination management approach and the development of collaborative partnerships allows for better tourism consideration in the planning for public infrastructure, as demonstrated in Logan City which has been able to incorporate tourism into their Local Government Economic Development Strategy, through a greater understanding of the importance of tourism, by both Council and the community. Tourism Opportunity Plans and Regional Tourism Action Plans, which have been developed in many regions across Australia,

can also provide a linkage between tourism demand and public sector planning, identifying key public infrastructure and investment opportunities at a destination level. Ideally, these tourism plans are integrated into the broader infrastructure 'Planning Environment' for regions and destinations.

Public infrastructure development is also critically important in the area of transport infrastructure and facilities for visitor access. Please see the section on 'Destination Access' for further information.

### *Private Infrastructure and Investment*

Private investment is an essential component of a destination's tourism infrastructure, products and services. Destinations require a dynamic investment environment including new developments, redevelopment and refreshment of tourism products, services and facilities to ensure the destination can maintain and enhance market appeal and provide exceptional tourism experiences. Private investment in tourism can be generated either from investment from existing business owners into expanding / developing their operations or from new investors within or external to the destination.

Whether it is investment by existing businesses or new investors, investment decisions need a strong business case to ensure investor confidence. Investment research has shown that:

- A planning scheme that is supportive and specific on appropriate tourism development is vital;
- Destinations need to provide visitor market research, projected market growth and supply / demand comparisons to assist investors to project their return on investment;
- An investment prospectus can be an important tool for a destination wishing to promote the specific new investment opportunities within the region. Some regions across Australia have developed tourism opportunity plans or regional / destination tourism action plans which highlight infrastructure and product development opportunities that will support tourism growth in the future;
- Strong stakeholder support for potential investment opportunities should be sought before promoting these ideas to the investment community, as highlighted by Positively Wellington Tourism which developed a cooperative marketing program with stakeholders to attract investment;
- Investors may choose a particular destination based on a positive destination image and branding, stakeholder support for tourism, planning and regulatory environment and supporting infrastructure within and close to the destination when developing a project concept. For more information on assessing the feasibility of a tourism project, please visit the section on 'Products and Experiences'.
- The 'public sector' also plays a critical role in attracting private investment to a destination through its 'planning and regulatory environment'. The development of tourism master plans and precinct plans for a destination can provide the

#### **Destination Management Tip**

Establishing a group to guide and support new tourism development through the approvals process can make destinations more attractive for private investment.

necessary zoning and development opportunities for investment in tourism facilities. The Ottawa Partnership in Canada provides a case study example of a public / private partnership designed to provide strategic advice on infrastructure development and education needs.

As one of the key actions arising from the 'National Long-Term Tourism Strategy' in Australia, the Investment and Regulatory Reform Working Group are currently undertaking a review of tourism investment attraction processes and strategies in Australia.

## *Destination Access*

One of the major foundations of tourism is the travel or transport component. A destination is in many respects defined by its ability to provide appropriate visitor access into a destination and dispersal throughout the destination. The dispersal of visitors throughout a region can provide economic and social benefits including improved services to the host community. Development of appropriate access for visitors to and within a destination includes consideration of a number of key factors.

### Understanding Visitor Demand

Determining the need for investment in transport and access facilities should be based on an assessment of the size and growth of both resident and visitor markets, including demand for transport types of these segments. Forecasting both visitor numbers and preferences are available from national and State tourism bodies. The transport preferences of visitors vary by visitor market and this needs to be taken into consideration when planning for transport development. A destination focussed on attracting a combination of visitor markets, such as fly-drive, drive only and cruise will need to plan a variety of transport options.

#### **Destination Management Tip**

Ensuring connectivity between transport nodes and primary visitor attractions needs to be a key part of government transport planning.

### Consideration of the Planning Environment

Planning for the long-term transport and access infrastructure for a destination needs to take into consideration a destination's geographical location, community needs and values, planning and legal restrictions and investment potential as well as the potential ecological, economic and social impacts of development. These factors can influence significantly the type and scale of transport development that can occur in a destination. A destination that is situated close to an existing major airport/transport hub may focus more on the development of linkages between the airport/transport hub and the destination rather than investing in the development of their own hub facilities. Excellent examples of forward thinking destinations who have invested in transport infrastructure include the Darwin Cruise Terminal; Newcastle Airport; Grand Pacific Drive and the Darwin to Adelaide railway.

### Ensuring Transport Connectivity

Visitors can use a wide range of different transport types during their trip including flying, driving, catching a bus / train, walking, cycling or cruising. Ensuring linkages and connectivity between transport options is important in providing a destination that is

easy to reach but also easy to travel within. Connectivity between visitor attractions in terms of access routes and transport options can also influence a visitor's initial destination choice, length of stay and overall satisfaction. Integrated transport plans have been developed in Queensland regions to ensure transport linkages and services are provided based on demand from residents and visitors.

Please use the links below to read more about the development of the three key types of destination access – air, land and sea. For more information on the public sector role in transport infrastructure development, please see the section on 'Public Infrastructure'.

### **Aviation**

Air access can have a significant impact on visitation to a destination. Not only important for international visitation, aviation is increasingly a key driver of tourism growth for many domestic destinations and more remote regions. The aviation industry is likely to face numerous challenges in the future relating to the economic, environmental and social sustainability of the industry. The development of aviation facilities and services in destinations needs to take into consideration factors such as:

- Assessment of existing and future demand for aviation by the community and visitors is essential in determining the potential for aviation facility or route development in a destination;
- A clear business case for route development is needed to attract investment. That means looking at the route economics (revenue per passenger kilometre) from an airlines perspective;
- Changing consumer behaviours and global trends have significantly influenced the airline industry and its development;
- The trend towards international travel and the introduction of numerous low-cost carriers world-wide have impacted on the profitability of full service airlines, domestic travel, services to regional and rural areas and other transport types;
- Planning for aviation facility and service development must recognise these trends and realistically assess the feasibility of development in a destination;
- The planning and regulatory environment for aviation has also changed significantly over the last twenty years with the deregulation of the airline industry and the increasing environmental compliance and reporting requirements.
- Recognition of the significant impact of the airline industry on the carbon footprint of tourism and trade globally will have a continued impact on the future development of visitor transport options. Planners must consider the impact of greenhouse gas emissions regulations and policies such as emissions trading, carbon taxes and the introduction of new technologies to lower emissions;
- Attracting airlines relies on a partnership between airports, government and promotional bodies to provide the infrastructure, incentive and promotion needed to make the route viable.

#### **Destination Management Tip**

Environmental reporting is increasingly important for the aviation industry, not only to meet regulatory requirements but to meet consumer, shareholder, employee and supplier demands.

Examples of sound regional aviation development include Newcastle and the Sunshine Coast, where tourism industry input into the development of Airport Master Plans has

guided effective planning for aviation services in the region. Adelaide Airport provides a best practice example of an airport that has developed a comprehensive approach to sustainability through its environmental policies and commitment to reduce its environmental footprint.

### Land Transport

Land-based transport incorporates a wide range of access options that are used by visitors when travelling to and within a destination including self-drive (car, caravan or RV), coach, bikeways, walkways, and public transport on rail and bus networks. The planning and development of an efficient land-based transport network involves consideration of:

- The current and future transport demands of both visitors and the resident community to identify infrastructure and service development priorities;
- An understanding of visitor flow and movement through a destination to inform the planning and designing of efficient transport networks and encourage regional dispersal;
- Connectivity between the different modes of transport, including linkages between train and bus services and transport to and from the airport as demonstrated in the Noosa Integrated Transport Strategy. This includes the provision of appropriate signage and way-finding tools and maps to allow for easy navigation through a region;
- Connectivity between transport and visitor attractions to ensure ease of access and encourage increased length of stay and expenditure;
- Changes in consumer travel behaviour and preferences including the trend towards less frequent and shorter holidays and the demand for experiential tourism;
- The impact of economic and social trends such as fuel prices and climate change awareness on the demand and use of transport types;
- The increasing use of the internet for trip planning and the impact on the types of promotional activities used and the way in which destination information can be communicated;
- Touring routes, itineraries and interpretative trails are just some of the techniques employed to alter the land travel paths of visitors.

#### Destination Management Tip

Encouraging regional dispersal through an efficient transport network provides numerous benefits to a destination including extended length of stay and increased expenditure.

For many regions, particularly those destinations that have limited public transport or air access, self-drive tourism is the major mode of visitor access. Planning and development of required road infrastructure for drive tourism needs to be matched with appropriate product development and an understanding of visitor characteristics and preferences. Drive visitors are not a homogenous group of travellers, they differ in demographics, motivations, trip length and style, information gathering and route planning preferences. Understanding the different types of drive tourists assists in assessing demand for further development of infrastructure and products in a region relative to this market.

The Sustainable Tourism Cooperative Research Centre has undertaken extensive research on the development and management of the self-drive market, summarised in 'Drive Tourism; Up the Wall and Around the Bend', which provides case study examples of successful planning, development and promotion of self-drive tourism in regions across Australia.

### **Water Transport**

Water-based transport is one of the most traditional and memorable ways for visitors to travel to and from a destination. It is not only a way to travel but a tourism experience in of itself. Cruise tourism has been a growing market sector around the world, not only as a means to travel to a destination but as an experience. The development of a destination as a cruise port requires in-depth economic, environmental and social assessment. Destinations also need to consider the capacity of existing tourism product, marine infrastructure, land-based transport services and tour operations to meet the needs of this market. Successful cruise destinations must provide a unique experience for visitors, have well organised transport systems and public amenities, clustered tourism products and attractions and a variety of excursion and shopping options. Alaska has been a highly successful region for cruise tourism, with its ability to retain a competitive edge through continual innovation in new shore excursions and activities.

There are a number of considerations in developing appropriate and effective water-based transport facilities and services in a destination including:

- Understanding visitor and resident demand for water-based infrastructure and facilities and assessing this demand against existing supply;
- Assessment of the ecological, economic, social and cultural impacts of water-based transport as demonstrated in the Kimberley Coastal Waterways assessment of the impacts of expedition cruising;
- Consideration of the planning and safety regulations and environmental restrictions for the development of water-based transport facilities;
- Development of a comprehensive management and monitoring plan for the transport operation to ensure sustainability of the business and conservation of the natural environment;
- Incorporation of all stakeholders interests and values to ensure support and commitment for development and ongoing management;
- Development of public / private partnerships to gain public support for infrastructure development and private involvement in tourism operations.

#### **Destination Management Tip**

The costs associated with marine tourism infrastructure mean that it needs a strong business case and a multi-destination or 'journey' approach to make it viable.

### **Accessible Tourism**

According to recent research as many as 20 percent of the population experiences some form of disability. Recognising the need to provide access for disabled and ageing visitors is a growing challenge for the tourism industry. However, the provision of 'accessible' tourism facilities and services is not only becoming increasingly regulated, it also provides an opportunity to expand services into this segment of the

market for operators and destinations. The development of accessible tourism to better accommodate visitor needs involves extensive planning for:

- Development of appropriate infrastructure for visitor accessibility including the design of transport facilities and access to accommodation, attractions and other tourism-related venues and facilities;
- Development of access precincts that incorporate destination experiences as well as accessible touring routes. Understanding the way that visitors move through a destination is important for the appropriate planning and design of infrastructure and facilities;
- Accreditation of tourism facilities in order to provide visitors reassurance that facilities meet appropriate standards for accessibility;
- Marketing and the provision of tourism access information in order to influence destination choice of visitors with a disability, as demonstrated by the 'Sydney for all' website. Without appropriate information on a destination's accessibility, visitors with a disability are unlikely to travel;
- Provision of destination and attraction information in a usable format during a visitor's trip. Consideration of the different types of disability/impairment and access requirements is important when developing promotional material and information sources;
- Engagement of tourism industry stakeholders, community and the public sector in recognising the need to provide accessible tourism infrastructure, amenity and services in a destination;
- Specific training on disability awareness and education for stakeholders on providing accessible tourism experiences.
- Raising industry awareness of the benefits of accessible tourism, which has been recognised as an impediment for the uptake of accessible tourism product development within destinations and businesses.

### **Destination Management Tip**

Many State Tourism Organisations provide advice and assistance on developing accessible tourism options and facilities within a destination.

The Sustainable Tourism Cooperative Research Centre has undertaken a large body of research into the development of accessible tourism. This research, summarised in the 'Accessible Tourism; Challenges and Opportunities Snapshot', has recognised the opportunities for destinations in accessible tourism and the need for the tourism industry to develop universal design principles for the development of infrastructure and products that are accessible for all.

## *Protection of the Natural Environment*

For many destinations, the natural environment is one of the primary attractions for leisure visitors. A wide range of recreational, activity based, educational, cultural activities and experiences, can be accessed by visitors in natural and protected areas. The development of natural and/or protected areas for tourism requires a careful balance between providing adequate visitor experiences and services, protecting the ecological and cultural values of the area and ensuring the long-term sustainability of the site. Key considerations for the development of natural or protected areas include:

- Effective public / private partnerships are the key to delivering memorable experiences in nature, as displayed in the Cradle Mountain, Esperance and Tapestry regions and their partnerships with relevant parks and environmental government departments;
- Understanding the political, social, cultural demographic and ecological environment surrounding the natural area when identifying potential tourism opportunities;
- Understanding the different categories of protected areas for the identification of restrictions on activity and development within a site and consideration of park management objectives and goals;
- Development of a park management plan or model to manage the environmental, social and economic impacts and issues in natural areas;
- Development of visitor education and interpretative information to provide an enhanced visitor experience and encourage conservation education;
- Establishing clear development and operational guidelines to ensure investments include sustainable practices;
- Development of performance indicators to measure and monitor the success of visitor management in natural areas to ensure that the natural assets are being adequately protected.
- Providing effective environmental management practices for tourism developments in protected areas.
- Integration of planning for the preservation of natural resources in relevant local, regional, state plans and strategies.

### **Destination Management Tip**

Visiting protected areas are at the top of most visitors itineraries so providing access and memorable experiences is vital to be a competitive destination globally.

The Sustainable Tourism Cooperative Research Centre has undertaken extensive research in the development and management of tourism in natural and protected areas. Further information on the development and management of natural / protected area assets as well as the social and cultural environments can be found in the 'Parks and Culture' section.

## *Destination Products and Experiences*

A destination's products, attractions and experiences drive a visitor's destination choice. Developing appropriate and innovative tourism product is essential for the long term sustainability of a tourism destination. Tourism product development should be based on:

### Visitor Needs and Demands

Simply developing a tourism product does not necessarily mean that visitors will come. Successful products and experiences meet and exceed visitor expectations and fit with the destination's brand. The 'Visitor Attractions Satisfaction Benchmarking

### **Destination Management Tip**

State and National Tourism Organisations provide information and assistance for destinations looking to attract tourism investment for their region.

Project' by the Sustainable Tourism Cooperative Research Centre developed the Importance-Performance Analysis Grid for assessing visitor satisfaction through analysing the importance of selected product attributes with overall performance or satisfaction.

#### Creating a Competitive Advantage

A new product should also be based on whether it will create a competitive advantage or add value to the existing tourism assets of a destination. A 4-Way Test (as below) can be used to help assess the value and sustainability of a tourism project or proposal. The test assesses the tourism development opportunity based on factors such as competitive advantage, responsibility and stakeholders, resource commitment necessary and action required. An analysis of existing competition within a destination and with other destinations is also important in assessing the long-term viability of a project.

<p><b>Competitive Advantage</b>          Is the product / experience unique?          Does it meet the needs of target markets?          Is the need for the product demand driven?</p>	<p><b>Who is Responsible?</b>          Is there evidence of market failure?          Is this a public or private project or is it a public/private partnership?</p>
<p><b>Resource Commitment</b>          Do we have the capacity / skills / resources to undertake the project?          Do we have the funds to undertake the project or what resources are available?          Is this project consistent with existing strategies and planning schemes?          Is there the required support product and infrastructure?</p>	<p><b>Taking Action</b>          What skills sets are required to take this project forward?          Who is responsible for approval of the project?          What are the risks?          Who are the potential partners?</p>

**Source: Local Government Pathways to Sustainable Tourism, Sustainable Tourism Cooperative Research Centre, 2009**

#### Investment Attraction

Local, State and National planning schemes define what is 'allowable', along with factors such as the land availability and zoning; infrastructure and resource capacity required and available and impacts on the environment and this will dictate the success of a development application. Once established, businesses should allow for a major refurbishment or reinvestment every 5-7 years to keep a product fresh and 'top of mind'. Investment into tourism products and experiences will be generated either through the private sector, public sector or through a public/private partnership. Please visit the sections on 'Public Infrastructure' and 'Private Infrastructure and Investment' for more information. Further information on product development by individual businesses can be found in the 'Business Operations' section.

Please use the links below to read more about tourism product development opportunities in specific market sectors including accommodation, events and festivals, food and wine, cultural and heritage and other niche markets.

### **Accommodation**

The availability of quality, value for money accommodation is a key component in destination choice and a top three consideration in short-break travel. Investment in accommodation development is primarily through private investment, however destination managers can assist in attracting investment for a destination. Key learnings for tourist accommodation development in a destination include:

- Attracting 'private investment' in accommodation in a destination requires a strong business case and in some cases requires incentives such as reduced time and cost to gain development approval to provide greater certainty;
- Developing an investment prospectus can provide a useful tool for highlighting development potential in a region and identifying key priorities for investment identified by the host community;
- An investment prospectus should be based on extensive market demand research, pre-feasibility studies of potential development opportunities, assessment of expected return on investment and input from a wide range of public and private sector stakeholders;
- Understanding a destination's 'visitor market', their preferences and motivations, is important not only for planning and developing accommodation but also for developing marketing and promotion strategies;
- Visitors preferences for accommodation are often influenced by age, gender, family structure, income and reasons for travelling;
- Accommodation development should be aligned with the overall 'brand' and image of a destination to ensure it is aligned with both consumer and host community values;
- Provide clear design guidelines in local government control plans for tourism development.

#### **Destination Management Tip**

Accommodation should be refurbished approximately every 5-7 years to meet changing visitor expectations and to ensure visitor satisfaction.

While destinations seek to attract investment in new tourism development, much of the investment in accommodation is likely to be in the refurbishment and refreshment of existing accommodation development to meet changing visitor expectations. Different types of accommodation have also been pursued in various destinations, with different ownership models and impacts. The growth in strata titled tourism accommodation complexes in Australia over the last decade, for example, has raised multi-stakeholder issues particularly in regard to the need for rejuvenation and refurbishment of these complexes, and their subsequent impact on destination lifecycles.

The Sustainable Tourism Cooperative Research Centre research on accommodation has largely focused on the field of strata-titled tourism accommodation. The research has found that of the three basic types of strata titled tourism accommodation – independent operators, branded strata title hotels and emerging strata title

organisations. The research further suggested that branded strata titled tourism accommodation is the most commercially viable, providing a more clearly defined and professional management structure, lowering potential conflict between owners and managers.

## Events and Festivals

### Understanding the Event Market

Events and festivals provide numerous benefits for a community and tourism region including increased visitation and expenditure, reduced seasonality, repeat visitation, heightened regional awareness and word of mouth recommendation. They can also provide the stimulus for additional infrastructure development in the local area and building community pride. Understanding the motivations of event attendees and event exhibitors is important in developing an appropriate event or festival that aligns with community values. Potential event attendees and exhibitors may be influenced by a wide range of factors including content and theme, location and access, event reputation, perceived quality and value for money, safety and security and support facilities. It is also important to understand and manage the impacts (economic, social, cultural, environmental) of events for local communities.

### Event Planning and Management

Developing a successful event, whether it is a local event, special event, business event or major event, requires extensive planning and commitment from a wide range of stakeholders. The development of an event should consider:

- Establishment of an event management committee to develop an Events Strategy for a destination and plan specific events;
- Developing an event concept or theme that is aligned with the destination's values, as seen in the Hunter Valley's program of events around the core theme of food and wine;
- Consideration of event requirements including funding, sponsorship, promotion, facilities and equipment, access, legal obligations and risk management;
- Developing an event that provides substantial benefit to a region involves increasing the economic value of an event to a region through increased length of stay before/after an event, increased expenditure from visitors and minimising environmental and social impacts;
- Building community pride and contributing to the sense of community through organised events.

#### Destination Management Tip

Events managers can monitor progress through the 'Encore' Evaluation Kit in order to assist with retaining sponsor support and improve over time.

### Event Evaluation and Improvement

The evaluation of a festival or event is important to assess the extent of benefit to the host community as a result of hosting the event. An economic evaluation of an event is the most common evaluation, however there is a growing requirement to consider the environmental and social impacts (positive and negative) from events. There are a number of methodologies that have been presented in research by the Sustainable

Tourism Cooperative Research Centre (STCRC). The evaluation of an event can also provide a way to collect demographic, marketing and visitor satisfaction data to assist in ongoing monitoring and improvement. Edinburgh is an example of a region that has been able to consistently improve and maintain the competitive position of their festivals and events through effective event evaluation and innovation.

'Encore' is a Festival and Event Evaluation Kit developed by the STCRC that is designed for event organisers and sponsors to assess the economic, environmental and social performance of an event, allowing event managers, funding agencies and host communities to monitor and improve their activities over time.

### Food and Wine

With the growing trend towards experiential tourism, the food and wine tourism sector has grown in importance as a product development opportunity in destinations that complements other destination experiences. The development of successful food and wine tourism products and experiences requires consideration of a number of factors, including:

- Developing an authentic food and wine experience that provides high quality products and experiences that are value for money;
- Providing variety of food and wine attractions, dining facilities and related events or experiences which are supported by the necessary accommodation and other visitor attractions and facilities;
- The setting of a food and wine region or individual attraction is important in a visitor's decision making process. Maintaining the tranquillity and uniqueness of the surrounding environments is essential for visitor satisfaction.
- Clustering of food and wine products and experiences to provide a variety of options for the visitor and enhance their overall experience;
- The use of trail maps and guides for visitors to navigate between local food and wine attractions has proven a successful method for assisting the visitor in their planning process and encouraging increased length of stay as displayed in the Barossa Valley's Butcher Baker Winemaker Trail;
- Effective dissemination of information to visitors in selecting a destination, product or experience. Research has shown the three major sources of information commonly used by food and wine tourists were print media, visitor information centres and 'word-of-mouth'. More recently, the growth in online information and social networking for pre-trip planning has shown a significant increase.
- Commitment and vision of the local tourism leaders and businesses and the delivery of high quality service by all staff, as highlighted by the success of the Hunter Valley as a food and wine region.

### Destination Management Tip

High quality food and wine experiences in a destination are one of the best ways to create positive PR and word of mouth. The STCRC Food and Wine Tourism Snapshot can show you how to achieve this.

The Sustainable Tourism Cooperative Research Centre has an extensive research library on the planning and development of food and wine tourism. The body of research, summarised in the 'Food and Wine Tourism in Australia Snapshot', highlights the growing importance of food and wine tourism, particularly in regional areas, and identifies significant trends and opportunities for the development of the industry.

## Culture and Heritage

Cultural tourism is one of the world's fastest growing experiences as visitors are increasingly interested in experiencing unique cultures and traditions. Managers of cultural and heritage places are also increasingly expected to use tourism as a source of revenue to maintain heritage properties. The successful development of cultural and heritage tourism in a destination requires:

- Providing visitors with access to authentic and tangible evidence of past and existing cultures;
- Identification of the unique point of difference of cultural attractions in order to provide value for the visitor;
- Research has shown that the use of a thematic framework approach can help to identify linkages between cultural heritage assets in a region around common themes such as the development of the Golden Way Heritage Trail in Victoria, linking historic goldfields and attractions. This can assist in building a critical mass of heritage tourism attractions in order to attract and retain visitors within a community;
- Development of strong partnerships between tourism operators, heritage managers and the local and indigenous communities as highlighted in the success of indigenous tourism in the Northern Territory's Tenant Creek and Barkly region and Katherine;
- Development of clear objectives which are agreed upon by all stakeholders for the development of heritage tourism products and experiences;
- Involvement of the local community in the development of cultural heritage attractions to ensure that the stories and traditions of past and existing cultures can be effectively communicated;
- The development of cultural and heritage attractions must balance both conservation and protection of the cultural assets as well as business needs;
- Clear visitor management guidelines must be established to ensure that the cultural and heritage assets are maintained;
- Interpretation of cultural heritage, through brochures, guided tours, interactive displays or interpretive information boards is an important part of providing a positive visitor experience as well as an education tool for the conservation of heritage.

### Destination Management Tip

Interpretation is the key to bringing culture and heritage 'to life' for the visitor.

The Sustainable Tourism Cooperative Research Centre has a large body of research into the development of cultural and heritage tourism, summarised in the 'Culture and Heritage Tourism; Understanding the Issues and Success Factors Snapshot', as well as specific information in the 'Parks and Culture' section of the portal. A landmark report in this sector, developed in conjunction with the Australian Heritage Council, provides a guide to the development of successful cultural and heritage tourism facilities and attractions, identifying the key considerations for planning, developing, managing and marketing these tourism products - 'Successful Tourism at Heritage Places'.

## Growing Niche Markets

There are a variety of other niche tourism markets that may be developed by a destination depending on its existing infrastructure, tourism products and facilities. Niche markets might include Farm and Country Tourism, Ecotourism, Bird-Watching, Cycle Tourism, Indigenous Tourism, Adventure, Spa and Wellness, Backpacking, Gay and Lesbian or Educational Tourism. The development of products and experiences to meet the needs of these markets should be based on an understanding of the markets characteristics, behaviours and preferences. Product development opportunities should be assessed for their feasibility and investment potential.

Research produced by the Sustainable Tourism Cooperative Research Centre (STCRC) has focused on the niche markets of:

- Farm and Country Tourism - Developing a tourism business on a property can provide a good source of additional income for landowners. The success of rural tourism ventures is dependent on the nature of the locality, property characteristics, human resources, market characteristics, marketing and accessibility.
- Backpacking Tourism – The importance of providing suitable work opportunities, appropriate accommodation facilities and opportunities for socialising for the backpacking market have been highlighted as the key factors for developing backpacker tourism in a destination.
- Educational Tourism – Research has shown that pricing, accommodation availability and ease of access are key influencers in a study tourism visitor's destination choice. Increasing expenditure from educational tourism can be achieved through targeted promotion and packaging of a destination's attractions and experiences to students.
- Bird-Watching – Research has shown that the core elements of a bird-watching tour or walk are the opportunities to identify birds, observe behaviour and have social interaction. In particular the opportunity to see rare, threatened and endemic bird species are important in holiday choice for a bird-watching tourists.
- Cycle Tourism – Increasing interest in cycle tourism from both a visitor and government perspective has been identified in research, in particular with the growth of the touring market. This research has also shown that domestic cycle tourists are very active travellers with a strong destination familiarity.
- Indigenous Tourism – Indigenous and aboriginal tourism is a growing tourism niche market for many destinations around the world. Indigenous involvement in tourism can provide significant economic development and social benefits for regional and remote communities and provide the opportunity for visitors to experience unique and tangible culture.

### Destination Management Tip

National and State tourism organisation regularly conduct research into niche products which can be accessed via their websites.

## Visitor Information and Interpretation

Effective pre-trip and en-route visitor information and interpretation can have a significant impact on destination choice, length of stay and expenditure. Today, online information and promotion are the primary means for visitors seeking trip planning information. Traditional information dissemination techniques such as brochures, trade shows and TV / radio advertising are also used as sources of information for pre-trip planning. Please refer to the section on 'Destination Marketing' for further information.

Research in Australia has shown that effective visitor information centres (VICs) can have a direct influence on visitor planning and decision-making, with survey research showing that 33 percent of respondents were influenced to participate in more activities after visiting a VIC. Visitor information centres are important in providing visitors with the information and trip planning services they require pre-trip, while they are en-route, or during their visit. Research into the effective planning and development of visitor information services provided by VICs has shown that:

- Visitor satisfaction and information provision by visitor information centres can have a significant influence on a visitor's length of stay, expenditure and repeat visitation;
- For the effective provision of information, visitor information centres must be able to handle peaks of visitors and communicate information effectively;
- Information provided in VICs should be targeted and specific but presented in a usable way, as displayed by Hunter Valley Wine Country Tourism which provides targeted publications for Conferences, Weddings and International Travel Planning;
- Visitor information centre staff need to be trained in customer service skills as well as strategies for communicating and promoting a region's products and services;
- Some visitor information centres have been late adopters of ICT technologies for the dissemination of visitor information however the increased use of these technologies can provide a more efficient means of disseminating information to a visitor, such as the Launceston and the Tamar Valley website which provides visitor information and online-booking capabilities;
- Some visitor information centres have become an attraction in their own right with the displays and interpretive facilities they provide, thus attracting and retaining more visitors in the region, as demonstrated by South Australia's Wadlata Outback Centre's development as a world class VIC and interpretive centre;
- Interpretation of tourism products and experiences, through brochures, guided tours, interactive displays or interpretive information boards is an important part of providing a positive visitor experience as well as an education tool.

### Destination Management Tip

Establishing effective management and operational models for Visitor Information Centres is important in ensuring the delivery of appropriate visitor information in a destination. The STCRC VICKit can assist.

The Sustainable Tourism Cooperative Research Centre has a number of research reports into the effective design and development of visitor information centres, the dissemination of information and the design of interpretation. STCRC has also developed an online 'VICKit' to support destinations to assess and improve visitor information centre performance as well as an 'Interpretation Evaluation Tool Kit'.

## Product Quality and Standards

Meeting and exceeding visitor expectations leads to positive word of mouth and potentially repeat visitation. Poor quality products and standards below visitor expectations can undermine the long-term sustainability of a destination. Product quality and standards influence visitor satisfaction, their length of stay and expenditure, and their likelihood to visit again or refer the destination to a friend or relative; and these are the fundamentals of sustainable visitation.

### Influencing Perceptions of Product Quality

Perceptions of product quality in the visitor's mind can be influenced by a number of factors. Pre-trip, the perception of product quality can be influenced by product branding, price, promotion and advertising techniques, location, affiliations, accreditations and the corporate social responsibility of the organisation. During a visitor's trip, the perception of a product can be influenced by physical appearance and upkeep, customer service, value added features, uniqueness, interest and enjoyment. Business owners and destination managers need to keep these factors in mind when developing or marketing a tourism product or destination for a particular target market.

### Accreditation and Certification Programs

Accreditation programs provide business owners and destinations with the opportunity to have their products or communities assessed and then recognised as providing a certain standard of practice. There are a range of different accreditation or certification programs available within the tourism industry, from national and international product quality accreditation to environmental certification and sustainability programs and specific quality standards for tourism industry sectors. The New Zealand destination of Kaikoura provides an excellent example of a regional approach to sustainability, with the community undertaking the Green Globe Asia Pacific benchmarking and certification program to enhance the region's image and environmental credentials. Promoting visitor awareness of these accreditation programs is important in influencing consumer purchasing behaviour and perceptions of a product, business or destination. Accreditation programs also provide a businesses or destination managers with a framework for identifying areas for improvement or development.

#### Destination Management Tip

Initiatives aimed at improving product quality are required to ensure that a destination's image is maintained over time. The STCRC EarthCheck program is a leading international certification program for sustainable tourism.

### Assessing Visitor Satisfaction

Visitor satisfaction surveys can be used to evaluate visitor perceptions of product or destination quality. In Australia, assessing visitor satisfaction at a destination level can be undertaken through Visitor Profile and Satisfaction Surveys developed by Tourism Australia. These surveys can then be benchmarked against other destinations nationwide. For further information on assessing customer expectations and satisfaction please see the 'Visitor Satisfaction' section.

Further information on product quality for individual businesses can be found in the 'Business Operations' section.

## *Industry Skills and Development*

People are the lifeblood of a tourism destination. Attracting and retaining adequate staff into the industry remains a global challenge. The right staff help to deliver the right experience. The delivery of a high quality customer service experience is essential to the sustainability and profitability of any tourism business, community or destination. A visitor's experience in a destination can be greatly influenced by the quality of the services and the personal interactions with host community industry employees throughout their stay. The tourism industry faces a number of challenges related to the labour market and meeting visitor expectations including the recruitment of staff, training and development, ensuring customer service quality standards and staff retention. Destination managers can assist the industry in meeting these labour market challenges through:

- Labour Market Access
- The development of both online and face-to-face networking forums providing opportunities for employers to source and recruit tourism employees has allowed for greater access to the tourism labour market. The development of these types of forums at a local level can also help to recruit and retain staff at a destination level. Further, international skilled migration programs can provide a valuable additional avenue for staff recruitment. Partnering with education providers is often the best way to access skilled staff.
- Training and Development
- Training and development programs for tourism industry staff need to be developed with a clear understanding of the customer's expectations and needs. Destination Managers should work closely with their industry businesses and education and training providers to ensure education and training programs are relative to the needs of host community's delivery of tourism experiences and products. The Sunshine Coast's Tourism Skills Alliance Program is a proactive example of this collaborative process at the destination level. Customer service training programs, such as the Service Excellence program implemented in the Daylesford region, and the Australia-wide AussieHost program provide nationally recognised standard training that can assist staff to up-skill. Training programs and accreditation also provide employers with confidence when recruiting new staff. 'Training Needs for the Hospitality Industry', developed by the Sustainable Tourism Cooperative Research Centre recognised the need for industry input into training and education programs for tourism and hospitality.

### **Destination Management Tip**

Tourism industry organisations and associations provide specific training and labour market development opportunities and advice for destinations and individual operators.

## Health, Safety and Security

Visitor safety remains an important topic worldwide. Perceived or real threats to visitor safety have immediate impacts on a destination's reputation and can dramatically affect visitation. If visitor health and safety is not well managed, adverse incidents can significantly impact on the profitability and sustainability of an individual business, community or destination. If a visitor feels threatened or unsafe during a trip this may impact on length of stay and expenditure in a destination and decrease the likelihood of repeat visitation and word-of-mouth referrals. If a destination develops a negative image for visitor safety this will likely result in a declining visitor market for the region.

Preparing and annually maintaining a Risk Management and Crisis Communication Plan ensures that your destination is well planned, prepared and ready to respond and recover. The Victorian Government have developed a comprehensive risk management program for the tourism industry. Managing visitor safety in a destination involves a 'whole of community' approach to the development of strategies to:

- Raise visitor awareness - Visitor health and safety campaigns such as the Tropical North Queensland Safe Travel website, and visitor information brochures can help to raise awareness of potential risks and safety concerns for visitors to a destination;
- Implement measures to reduce incidents - Undertaking a risk assessment can help to identify potential risks for visitors and implement preventative measures to reduce their likelihood;
- Effectively cope with incidents - The development of a 'Risk Management Plan', in collaboration with relevant agencies and organisations (e.g. police, community health and fire service) will allow for the identification of a process and strategies to respond and cope with adverse incidents. Understanding public liability responsibilities is also an important part in developing a plan to manage risk;
- Manage media coverage after an incident – A 'Risk Management Plan' can assist in identifying strategies and processes to manage media coverage and the impact on the destination's image after an adverse incident, such as the promotional activities implemented by Grampians Marketing Inc following the 2006 bushfires.
- Monitor the occurrence of incidents – A monitoring program will allow for the continued evaluation of risks and management strategies for adverse incidents. Visitor satisfaction surveys can be used to measure and monitor any changes in visitor perceptions of safety and security within a destination.

For further information on risk management and the development of a Risk Management Plan for a destination please visit the section on 'Risk Management Plan'.

### Destination Management Tip

The development of a Risk Management Plan will allow for the identification of a process and strategies to respond and cope with adverse incidents.

### Destination Management Tip

State and National Tourism Organisations provide a range of information and advice on sourcing funding and grants for tourism development.

## Funding and Grants

Securing funding is often key to building a destination, ahead of private sector investment and implementing the strategic direction for tourism. Destinations have traditionally relied on local, state and national government funding support for catalyst tourism infrastructure development, management and marketing initiatives. There are a number of State and National funding and grant initiatives that are offered for individual tourism businesses, tourism destinations and destination management organisations. As part of the actions arising from the 'National Long-Term Tourism Strategy' in Australia, the Investment and Regulatory Reform Working Group have documented the funding and investment assistance programs available in Australia for tourism development.

One of the common local level funding models implemented by local and regional tourism organisations is a tourism business levy model. The funds raised from a tourism business levy, such as that introduced in Noosa, are used to directly support tourism management systems, development of infrastructure and facilities, destination marketing initiatives, conservation of natural and heritage environments, research and education and to contribute to relevant community initiatives.

According to the 'Sustainable Regional Tourism Destinations' project undertaken by the Sustainable Tourism Cooperative Research Centre, to establish methods to improve funding for tourism best practice regional tourism destinations:

- Consider and introduce a tourism business levy scheme;
- Apply for National and State government grant opportunities
- Collect membership fees for the local and regional tourism associations; and
- Establish commercial booking services as part of Visitor Information Centre operations.

## Destination Marketing

Destination marketing is the process of communicating with potential visitors to influence their destination preference, intention to travel and ultimately their final destination and product choices. Destination marketing is a major part of the 'Implementation' process; it is the articulation and communication of the values, vision and competitive attributes of the destination. The actions implemented in the destination marketing phase should be underpinned by the findings of the 'Destination Planning', process and the subsequent 'Destination Development' activities.

Successful destination marketing involves:

- Understanding the motivations and preferences of visitors in their decision-making and travel planning process and how these behaviours change over time;
- Identifying appropriate visitor markets that 'fit' the destination attractions and experiences and align with community values;

### Destination Management Tip

State and National Tourism Organisations commonly provide a range of marketing resources and tools for destinations to leverage as part of their own marketing campaigns.

- Developing a 'Strategic Marketing Plan' to provide direction for destination marketing activities;
- Developing a stakeholder agreed, strong and recognised destination brand and image that is underpinned by the values and unique point of difference of the destination;
- Facilitation of a process to engage stakeholders to implement key marketing activities including:
  - Relevant promotional and advertising actions to influence visitor perceptions, awareness and destination choice;
  - Effective sales and distribution channels to enable conversion of intention to visit into actual visitation;
- Development of cooperative marketing programs with tourism organisations and businesses to provide resource synergies and increased visitation potential for a destination.
- Gaining 'cut-through' of your message either through innovative marketing ideas, for example Tourism Queensland's 'Best Job in the World' campaign or by allocating significant budget to marketing to gain a greater 'share of voice'.
- Effectively building a destination brand that is in harmony with the community's aspirations.

Please use the links below to find out more about the individual stages of the destination marketing phase. More information regarding the development of a marketing plan for a destination as part of the planning phase can be found in the 'Strategic Marketing Plan' section.

### *Market Research and Insights*

Market research is essential to track and respond to changing market needs and support sustainable development and marketing of tourism. Understanding your 'visitor market' and what influences their holiday planning decisions and behaviours includes:

- Understanding Destination Choice
- When planning a holiday and choosing a destination, a visitor's decision-making process can be influenced by a wide range of factors. A visitor's preference for a destination may be influenced by:
  - Marketing variables – product, price, promotion and place;
  - Traveller variables – previous experience, demographics, lifestyle and values;
  - Travel purpose and motivations;
  - Destination awareness, image and brand.
- Destination managers, marketers and planners need to understand the relative importance of destination and product characteristics to a visitor's holiday decision-

#### **Destination Management Tip**

Monitoring social trends can provide insights into future consumer trends and give your business or destination a competitive advantage.

making and destination choice. Understanding what a visitor seeks in terms of destination products and experiences allows for targeted marketing and promotional programs and the development of relevant products, infrastructure and facilities. 'Positively Wellington Tourism's' research program actively monitors visitor satisfaction and visitation behaviours to assess visitor preferences. While visitor surveys can provide an insight into the visitor's destination choices, the application of a consumer choice modelling process can provide a detailed analysis of a visitor's preference for one destination over another. There are a number of reports produced by the Sustainable Tourism Cooperative Research Centre relating to visitor choice modelling for destinations and tourism products.

- Understanding changing consumer behaviours
- Changing consumer behaviours have a significant effect on how a destination is managed and developed over time. Research has shown a number of key trends and changes in consumer behaviour and preferences over the last decade including increasing usage of the internet and online purchasing of travel products, increasing preference for overseas travel with the introduction of low-cost airlines, increasing demand for experiential holidays and the trend towards shorter holidays.

Changes in consumer behaviour may be influenced by demographics, economic trends or social and environmental factors. Understanding how these changes in behaviour might affect the destination is important to ensure that a destination can respond to these changes effectively. Trend forecasting undertaken at a national or global level and visitor surveys at a destination level can provide an insight into changes and trends in consumer behaviour. Regional data collection programs such as those developed by the Discovery Coast and Noosa regions have assisted in decision-making and evaluation processes.

## *Brand Development and Management*

### Establishing a Destination Brand

Developing a strong, recognised and consistent brand and image is important for promoting a destination. The development of a brand proposition for a destination should be based on the values of the destination and build upon the point of difference or unique selling point of the region. One overarching brand proposition that is agreed on by a wide range of stakeholders is important in developing a coordinated and consistent approach to position and promote a destination. A successful brand is emotionally appealing, targeted to visitor preferences and values and efficient in the delivery of that message as highlighted in the long-term success and consistency of Noosa's brand, values and image.

#### **Destination Management Tip**

A destination's brand and positioning should guide all marketing activities, campaigns and strategies to ensure consistency and create destination awareness and recognition.

## Brand Recognition and Salience

Brand salience, the propensity of a brand to be noticed or be considered, has been increasingly considered as a determinant of consumer behaviour. Understanding a consumer's goals when developing a brand and identifying effective communication strategies can help to increase brand recognition with potential visitors. A brand that is developed based on the experiences and places of a destination is likely to be more salient than a brand that presents a set of generic destination images. Visitor surveys and market research can be used to assess a destination's brand strength through an analysis of destination awareness and image. Victoria provides a best practice example through its regular Regional Awareness Perceptions Study that assess regional brand health and awareness to inform strategic planning and marketing.

## Brand as a Motivator for Destination Choice

A destination's brand or image can be a significant motivator for a visitor's decision making process when choosing a destination. The consumer decision process will vary based on the type of holiday or experiences being sought. Therefore, understanding visitor motivations and travel preferences is important for developing a destination brand. This is also supported by research indicating that a visitor's destination choice can be influenced by a link between the destination's image and the visitor's self-image.

The Sustainable Tourism Cooperative Research Centre's body of research in brand development and management has focussed on the concept of brand salience and brand alignment with the values of a destination.

## *Promotion and Advertising*

Promotion and advertising is designed to provide consumers with the necessary information to differentiate between destinations and influence their destination and product choices. Advertising can not only influence a potential visitor's initial choices but also influence perception and length of stay. Research into the development of promotional and advertising techniques for a destination has shown that:

- The choice of promotional and advertising techniques should be based on sound market research regarding visitor markets' information seeking behaviours, planning and decision-making processes.
- Advertising should be targeted based on a segmentation of 'visitor markets' and provide realistic messages to ensure delivery on the marketing promise.
- Segmentation can be based on visitor demographics, interests, behaviours or values. The targeting of spa and wellness experience seekers in Daylesford marketing campaigns has been successful in raising brand awareness and encouraging regional dispersal.
- Understanding the destination's key point of difference or competitive advantage is an important aspect in developing a marketing or advertising campaign.

### **Destination Management Tip**

Leveraging low-cost marketing techniques such as PR and media and cooperative marketing as well as dedicated marketing campaigns is important in achieving greater return on investment.

- Assessing a destination's performance in key market segments against its competitors can help to identify the areas in which the destination has an advantage and this can form the basis for targeted marketing campaigns.
- The selection of appropriate marketing techniques will be influenced by consumer trends and changes in consumer behaviours over time as highlighted by the Grampians region repositioning as a place where visitors can reconnect with nature away from commercialism;
- The increasing use of internet for visitors seeking destination information has significantly changed the tourism industry's approach to destination promotion and advertising. The use of online technology for promotion and advertising including websites, e-marketing and networking sites are now seen as an essential part of effective marketing campaigns.
- The development of creative promotional and advertising images that are consistent across all media and on-line collateral;
- Leverage PR opportunities that are linked to tactical advertising campaigns and encouraging the support of leading tourism operators within the destination that act as ambassadors to showcase the destination;
- The growing trend towards environmental sustainability means that destinations today must now be able to convey their environmental credentials and commitment through their advertising, as demonstrated by the Great Ocean Road through their introduction of their Sustainability Framework program. The challenge for destinations is being able to avoid the marketing 'greenwash' that has become prevalent within the industry.

The Sustainable Tourism Cooperative Research Centre has undertaken a number of research projects in modelling and assessing destination competitiveness to identify key destination strengths and opportunities and develop appropriate marketing messages for consumers.

## *Sales and Distribution*

Successfully reaching a destination's visitor market with the necessary information and booking channels is essential in converting intention to visit into actual visitation. The sales and distribution channels used by destination managers have been influenced significantly over the last decade with the rise in internet usage. While traditional methods of sales and distribution such as travel shows, tour wholesalers and travel agents still play a real part in converting potential visitors, the trend toward online conversion has been the focus of much attention in the future of sales and distribution techniques in the tourism industry.

### **Destination Management Tip**

Use of the internet has changed the distribution network but you will still need to work with major partners to avoid being lost in the crowd.

Research into the development of online sales and distribution channels has shown that:

- An increasing number of visitors are using the internet for all of their travel planning needs, including information seeking, holiday / route planning and booking transport, accommodation and tourism-related products;

- The use of 'new media' such as Customer Relationship Management systems, email marketing, IT systems and real-time web reservation services are becoming an increasingly important aspect of marketing and sales;
- Search engine optimisation and paid online marketing campaigns, website linkages and distribution providers can all help in increasing the exposure of a website;
- Online booking and reservations systems such as the Discover Tasmania online reservation system, can increase overall bookings if a website is user friendly, regularly updated and search engine optimised;
- There is an increasing trend towards websites that have user-generated content, allowing consumers to submit their own travel-related content and reviews of travel products and destinations.
- Websites with user-generated content such as blogs, reviews and social networking can provide potential visitors with information that can influence their decision-making process and destination choice;
- Evaluating the success of online sales and distribution techniques is important in developing future marketing strategies.

The Sustainable Tourism Cooperative Research Centre has undertaken research into the opportunities for consumer-generated web-based content including an analysis of the appropriate development and design of such content pages.

### *Cooperative Marketing and Partnerships*

Marketing an individual product or attraction can be an expensive and time intensive process for an industry operator. Marketing at a destination level through a collaboration effort between industry stakeholders can help to gain time and cost efficiencies and identify new market potential. Destination marketing can also lead to extended length of stay and increased expenditure within a region. Research into the development of cooperative marketing partnerships in a destination has shown that:

- Establishing a dedicated and experienced marketing committee as part of the overarching 'Destination Management Structure' to guide and inform decision making for destination marketing;
- Cooperative marketing partnerships should involve a range of industry stakeholders and be based on shared values and goals, as highlighted in the establishment of the Grampians Marketing Inc to bring together local industry and the State Tourism Organisation;
- Cooperative marketing should promote a consistent and shared 'brand' or destination image in the promotional and advertising techniques selected;
- The identification of promotional techniques should also be based on an assessment of the target market and competitiveness attributes of a destination;
- Cooperative marketing should be targeted and specific to a particular target market segment of a destination, as highlighted in the cooperative marketing alliance formed between the Great Ocean Road, Grampians and Goldfields to promote the Great Southern Touring Route;

#### **Destination Management Tip**

Cooperative marketing can be a more cost-effective means of raising the destination's profile in the marketplace and showcasing a destinations products and experiences.

- Clear roles and responsibilities should be developed for all stakeholders involved in a marketing partnership;
- A partnership agreement or MoU between stakeholders can assist in establishing a framework for the management of cooperative marketing initiatives;
- The development of public / private partnerships can be a very effective type of marketing partnership;
- Evaluating the success of collaborative marketing efforts is important in identifying future opportunities and strategies.

The Sustainable Tourism Cooperative Research Centre has research focussed on the development of public / private partnerships for tourism and the engagement of stakeholders in destination management. Please see the section on 'Stakeholder Representation and Engagement' for further information on developing collaborative partnerships between industry, community and government stakeholders.

## Ongoing Management

Destination management is not a static framework but rather a cyclical and continuous process that requires ongoing management, monitoring and improvement. The tourism sector is complex and dynamic. It is likely to become increasingly competitive over the next decade as changes and trends in the global and national operating environment impact on consumer preference and needs, government policy and investment attraction. Aside from these trends, a destination's approach to managing tourism may also be influenced by regional changes to the operating environment or changes to organisational structures, resourcing or governance of stakeholders involved in destination management.

### Destination Management Tip

You can't manage what you don't measure. Track your performance and that to plan your future.

Destination managers must be proactive in this ever changing environment and be able to develop flexible and effective strategies and plans to manage good destination outcomes. To be successful, a destination must commit adequate resources and time for the ongoing management of tourism including the continuous review of the planning, development and marketing activities and processes of the destination. Developing a framework for ongoing management of a destination for tourism involves:

- Undertaking regular performance monitoring and evaluation against destination goals to assess performance, identify strengths and weaknesses, future opportunities and areas for improvement;
- Identifying and implementing best practice principles and strategies for sustainable destination management;
- Pursuing innovation in destination planning, development and marketing;
- Understanding and identifying strategies to leverage key enablers for future growth and development including investment, research and labour;
- Undertaking forecasting and trend analysis to identify future strategic direction and priorities for tourism planning, development and marketing activities.

Performance monitoring is a significant part of the destination management process and further information on monitoring and evaluating a destination's performance can

be found in the section on 'Destination Performance'. For further information on tourism best practice, innovation in tourism and forecasting and trend analysis please use the links below.

### Tourism Success Factors

The success of a tourism destination in its approach to destination management can be influenced by a wide range of factors. As a dynamic and complex industry, destination managers need to be continually monitoring, reviewing and evaluating tourism performance and management strategies to ensure the long-term sustainability of tourism in the destination. The strategic planning and ongoing management for a destination will contribute to the continuous improvement and success of a tourism destination. A wide range of research has been undertaken into the best practice of tourism organisations and destinations around the world.

**Destination Management Tip**

Learning from the previous successes and failures of a destination and other destinations provides valuable information for future planning and development.

One of the key reports produced by the Sustainable Tourism Cooperative Research Centre, investigates best practice and success factors of sustainable regional tourism destinations. The report, 'Sustainable Regional Tourism Destinations Project', uses the following destination framework to identify best practice principles and strategies for the sustainable management, development and marketing of regional tourism destinations in Australia:



**Source: Wray et al, 2010, 'Sustainable Regional Tourism Destinations Project', Sustainable Tourism Cooperative Research Centre**

Research findings showed that regional destinations that have a strong level of support from their State or territory governments, well-established regional and/or local tourism organisations, supportive local governments, and local leaders that foster and implement a shared vision for sustainable tourism are well-placed to innovate, compete and implement sustainable tourism best practice in the future. For each best practice principle identified in the research, best practice snapshots are presented based on leading destination case studies in Australia.

Innovation in tourism and destination management is a significant part of a destination's long-term sustainability and success. For further information, please see the section on 'Innovation in Tourism'.

### *Innovation in Tourism*

The long-term success and sustainability of tourism in a destination can be linked to the ability of the destination and its stakeholders to foster innovation in their approach to destination management. A landmark research report produced by the Sustainable Tourism Cooperative Research Centre (STCRC) developed a range of case studies focusing on the structures and processes used by regional destinations to foster innovation. The 'Regional Tourism Cases' report highlights the need for destinations to consider three core frameworks of destination management:

- History Matters – For regional destinations to embrace change and be innovative they must first understand their own development history and management choices and their current stage of development;
- The System Matters – Understanding the tourism as a interrelated network or system can help explain the complexities of the sector, interactions between stakeholders and identify challenges and opportunities for innovation;
- Knowledge Matters – Understanding innovation and the regional tourism system can help in building capacity for regional destinations to capitalise on the economic, social and environmental benefits of tourism.

#### **Destination Management Tip**

Case studies of innovative and best practice destinations are widely published and available both within Australia and internationally. The STCRC's regional tourism case studies are a great starting point.

In related research undertaken by the STCRC, the 'Prosper; An Evaluation of Tourism's Contribution to Regional Economies' report identifies nine key factors that influence innovation in a destination:

- The economic competence of a destination and its stakeholders;
- Clustering of resources including tourism products, skills and amenities;
- Understanding the tourism network and the relationships between stakeholders;
- The existence of development blocks based on a fundamental attribute of a region;
- The entrepreneurial capacity of destination leaders;
- Developing a critical mass of tourism product in a region;

- The engagement of Local Government in the innovation process;
- The effective production and distribution of knowledge throughout the tourism network;
- The strength of the social, political and cultural environments.

## *Forecasting and Trend Analysis*

### Tourism Trend Analysis

In an ever-changing, dynamic and volatile sector, tourism destination managers need to be continually adapting to the changing environment in their approach to destination management and strategies for destination development and marketing. Understanding current and forecast trends including economic, social, environmental trends and changing consumer behaviours is important in responding with an appropriate strategic approach. Identifying and assessing industry trends can be undertaken through visitor surveys, visitor profile and statistical research and global and national trend analysis.

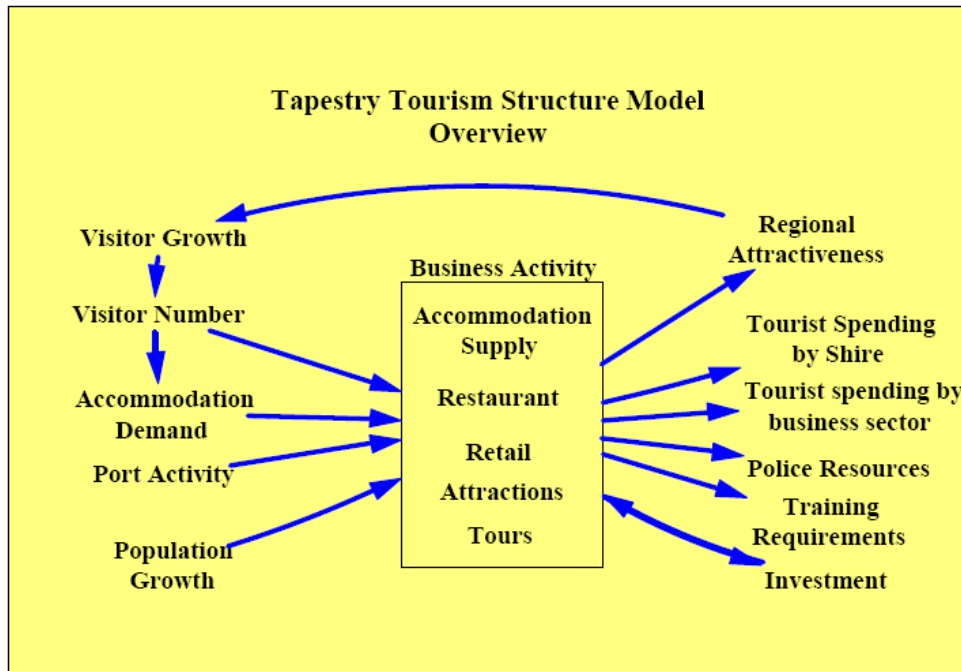
### Tourism Forecasting

Tourism forecasting and modelling are important in identifying possible future trends that may affect the industry at a national or destination level. National level forecasts can provide high level insights into expected visitor numbers and growth, source markets and other potential market changes that may affect future planning for a destination or region. At a destination level, predictive modelling for tourism can help managers to identify potential issues, challenges and opportunities for the future development and management of tourism in a region. Predictive modelling can assist in testing possible tourism scenarios and their potential impact on the destination and its future planning and management.

There are a range of predictive modelling tools such as input-output analysis, computable general equilibrium models, tourism systems models and Geographical Information Systems that have been developed. The Tapestry Tourism Futures Model, developed by the Sustainable Tourism Cooperative Research Centre in the 'Regional Tourism Modelling' report, is a tourism systems model approach to forecasting and scenario analysis. The Tapestry Model framework (as below), applied to the Tapestry region as a case study, assesses the impact that a growth in visitor numbers or population will have on expenditure, business activity and demand for infrastructure development and investment in the region. A similar model was also used in the Ningaloo Destination Modelling project undertaken by the STCRC.

#### **Destination Management Tip**

State and National Tourism Organisations provide regular forecasting and trend analysis research publications that can be used by destinations in understanding future market changes and opportunities.



Source: Walker et al, 2005 'Regional Tourism Modelling; The South West Tapestry', Sustainable Tourism Cooperative Research Centre

## Destination Performance

'You can't manage what you don't measure'

The sustainability of a destination is significantly influenced by its ability to adapt to changing market conditions, use resources efficiently and deliver innovative planning and development strategies. That requires an objective review of past performance as part of an ongoing and cyclical process to monitor and evaluate a destination's progress in achieving its goals and vision. Measuring and monitoring destination performance is important in identifying future opportunities and challenges for tourism in the destination and strategies to improve on performance over time.

Academic and industry research from around the world has shown that effective destination performance monitoring should:

- Be based on key performance indicators or achievement levels that are developed and agreed in the planning and implementation phases of destination management;
- Be based on a performance monitoring framework that guide activities, timing and methods and identifies key roles and responsibilities;
- Identify relevant performance monitoring tools, methods or certification options to assist in measuring and reporting on performance;

- Include an assessment of the organisational performance of destination management organisations as well as destination-wide performance data including visitor satisfaction;
- Sustainability indicators should be used to measure the economic, social and environmental impact of tourism on the destination;
- Regularly monitor potential risks to ensure that appropriate prevention, preparedness, response and recovery strategies are developed;
- Measure destination performance over time against agreed industry benchmarks for best practice;
- Identify strategies for continual improvement and innovation to achieve best practice and destination goals;
- Communicate and report on destination performance achievements with stakeholders, including visitors;
- Identify strategies to leverage performance achievements with funding agencies, suppliers and statutory bodies.

A number of core topics relating to destination performance are described in further detail in the links below including results for topic-relevant research, tools and resources.

## Performance Monitoring and Evaluation

In an ever-changing and competitive industry, tourism destinations must be able to adapt and respond to changing conditions and capitalise on strengths and opportunities. Monitoring and assessing a destination's performance allows for an evaluation of the destination's success in achieving strategic priorities, providing the basis for future decision-making and performance improvement. Developing a performance monitoring program at a destination level includes consideration of:

- Performance monitoring at a destination level may include reviews of:
- Organisational performance of individual destination management organisations including an assessment of governance practices, employment, marketing, product development, funding, membership, investment, industry development and partnerships;
- Destination-wide performance in tourism including an assessment of visitor numbers, growth, expenditure, satisfaction, destination preference and conversion and length of stay. Measuring tourism yield can also be an important indicator of performance of a destination including economic, environmental and social value of tourism to a destination;
- Key performance indicators should be used as a point of comparison when assessing destination performance. KPIs should be developed as part of the strategic planning process and must be specific, timely, quantifiable and be directly linked to the destination's strategic goals;
- A clearly defined performance monitoring program or plan should be developed that clearly articulates KPIs, timing of the reviews, data collection methods,

### Destination Management Tip

Key performance indicators should be used as a point of comparison when assessing destination performance. KPIs should be specific, measurable, achievable, reportable and timely (SMART).

responsibilities and the process for analysing results and implementing actions following a review;

- Information and reporting systems including online tools provide an effective resource for performance monitoring and evaluation.

The Sustainable Tourism Cooperative Research Centre developed the 'Industry Performance Analyser for Tourism (IPAT)' tool for the collection and analysis of statistical and benchmarking data at a regional level. IPAT provides a flexible online data entry tool for collecting operator data and aggregating it to provide destination-wide performance data. The 'ASPIRE' program, implemented by Queensland Regional Tourism Organisations, is based on the IPAT platform and provides an organisational performance and benchmarking tool for assessing the operational performance of destination management organisations.

A destination's performance monitoring framework should be clearly outlined in the strategic documents guiding destination management including the 'Research Plan' and 'Strategic Plan'.

## Sustainability Benchmarking and Reporting

Evaluating a destination's performance is not only concerned with visitor statistics and economic value. Achieving sustainable tourism development in a destination requires consideration of the triple bottom line, the economic, social and environmental impacts generated by tourism. Measuring a destination's economic, environmental and social footprint and monitoring its impacts over time allows for the development of a decision-making framework to achieve sustainable development in a destination.

### Sustainability Indicators

A performance monitoring program based on a defined set of sustainability indicators provides a framework to review and monitor economic, social and environmental impacts. An agreed set of performance indicators provides for measurement and monitoring over time, allowing for comparison on past performance and against other destinations and reporting on achievements. Based on extensive research and scientific expertise, the Sustainable Tourism Cooperative Research Centre (STCRC) developed the Earthcheck sustainability indicators for a wide range of tourism industry sectors and communities.

### Destination Management Tip

Using an environmental certification program that allows for benchmarking and third party auditing provides a strong basis on which a destination or business can promote their sustainability achievements.

### Benchmarking and Reporting

Using indicators to benchmark performance against best practice provides the basis for identifying strategies to improve performance and enhance competitiveness. The suite of Earthcheck indicators produced by the STCRC were developed with baseline and best practice standards for each indicator based on extensive global research. These standards allow for tracking a destination's performance over time and comparing results with desired performance levels. Reporting on sustainability performance to all

stakeholders is also important in promoting a destination's sustainability achievements and credentials.

### Accreditation Programs

Environmental and sustainability certification programs provide destinations with an opportunity to make a long-term commitment to sustainable tourism development. There are a wide range of accreditation and certification programs available at a business operations level, however there are currently few available at a regional or destination level. The 'Earthcheck Benchmarking and Certification Program' (previously known as Green Globe Asia Pacific), based on the Earthcheck indicators, provides destinations and communities with an opportunity to measure and manage their sustainability footprint. Destinations can benchmark results against industry best practice, produce benchmarking reports and achieve certification for performance. The community of Kaikoura in New Zealand is a best practice case study of a destination that has taken a proactive approach to sustainability performance improvement through their commitment to the Green Globe Asia Pacific Community Standard.

## Visitor Satisfaction

As a service-orientated industry, tourism operators and destinations must continually strive to meet the demands and expectations of visitors for quality tourism products, experiences and services. Visitor satisfaction is determined by a combination of perceived value and quality, consumer expectations and actual experience. A visitor's overall satisfaction will influence the likelihood of repeat visitation, extended length of stay, increased expenditure, enhanced yield and word-of-mouth referrals. Measuring visitor satisfaction is a key indicator of the performance of a destination and can assist in:

- Providing a basis for future strategic planning for tourism development, recognising the need to align visitor perceptions and expectations with the development and delivery of appropriate products and experiences;
- Identifying key gaps or areas for improvement in the tourism product / experience in the destination;
- Aligning industry operator perceptions of consumer value and the consumer's actual expectations in the delivery of tourism services;
- Understanding differences in visitor expectations between different visitor markets or segments, including international and domestic visitors or individual niche market segments;
- Identifying opportunities for value creation in the tourism offering and increasing yield in the destination;
- Identifying key trends in visitor market expectations and demands;
- Providing a basis for comparison of the destination to its competitors;
- Identifying opportunities for leveraging key points of advantage through marketing and promotion;
- Providing a quantifiable measure of a destination's performance against its goals or Key Performance Indicators (KPIs);
- Providing a quantifiable measure of a destination's performance for funding and reporting requirements.

### Destination Management Tip

State and National Tourism Organisations often use visitor satisfaction surveying to provide essential insights for destination managers.

Visitor satisfaction surveys, such as the Regional Visitor Monitor developed by Wellington Tourism and Tourism Research Australia's methodology for benchmarking destination performance, are commonly used as a method to track and analyse visitor demands and expectations in a destination. The 'Visitor Attractions Satisfaction Benchmarking Project' developed by the Sustainable Tourism Cooperative Research Centre developed the Importance-Performance Analysis Grid (as below) for assessing visitor satisfaction. The application of the model aims to bridge the gap between consumer expectations and experience delivery through understanding the importance of selected product / experience attributes with overall performance or satisfaction.

### Importance-Performance Grid Example

<i>Importance rating</i>	Concentrate here (Quadrant A)	Keep up the good work (Quadrant B)
	Low Priority (Quadrant C)	Possible overkill (Quadrant D)
	<i>Performance (satisfaction) rating</i>	

**Source: Modified after Matilla and James (1977), in Ritchie B et al, 2008 'Visitor Attractions Satisfaction Benchmarking Project', Sustainable Tourism Cooperative Research Centre**

## Risk Management

The ability of a destination to effectively respond to crises and risk occurrences can be a key determinant of the short and long-term sustainability of tourism in the destination. Monitoring and reviewing the performance of a destination in managing risks is essential to ensure the relevance of the risk management process. A successful risk management performance review process should:

- Be based on a comprehensive Risk Management Plan, developed as part of the strategic planning for the destination. This plan should incorporate strategies for preventing / mitigating identified risks, having processes and plans in place for potential risk occurrences, identifying processes for responding to crises when they occur and identifying actions for recovery following a crises. Please see the 'Risk Management Plan' section for further information;
- Monitor existing risks and identifying new risks as they arise in order to evaluate risk mitigation and treatment options;

### Destination Management Tip

Destinations that plan, prepare and manage risk can recover up to twice as quickly as those that do not.

- Regularly test the risk management plan processes including crisis management exercises with key personnel;
- Evaluate the success of the risk management plan and processes following the occurrence of an adverse incident or crises; as demonstrated by the Grampians Regional Tourism Recovery Group which considered the crisis management processes implemented in the 2003 bushfires in preparing its crises plan that was successfully implemented during the 2006 bushfires;
- Develop key performance indicators or targets as part of the risk management plan as a basis on which to evaluate the success of a destination's management of a crises;
- Include a crisis debriefing after an adverse incident to evaluate the management and outcomes of a crises in order to improve future plans and processes;
- Incorporate risk management monitoring into part of the organisation / destination's ongoing performance review framework;
- Establish clear processes for monitoring, reviewing and evaluating the risk management process, including key responsibilities and timing.

The 'Tourism Risk Management Guide' produced by the APEC International Centre for Sustainable Tourism and the Sustainable Tourism Cooperative Research Centre provides a framework for destinations undertaking a tourism risk management process and developing a risk management plan.

## Review of the Planning Framework

Destinations should undertake a review of their tourism infrastructure and investment attraction at least every three years. This review should include an infrastructure audit and identification of new investments made in tourism including public and private investment, refurbishment and 'green-field' development. This process is valuable in identifying potential barriers to investment including those in the planning and approvals processes of Local, State, Territory or National Governments.

As a minimum this process should include:

- Quantitative analysis of supply and demand including historic and forecast figures;
- Qualitative assessment of the approvals process through interviews / questionnaires of investors;
- Discussions with planners regarding successful and unsuccessful planning applications;
- A review of a similar destination's investment and infrastructure growth over the same time; and
- Analysis of visitor satisfaction research.

### Destination Management Tip

Planning and development legislation and processes change regularly. Monitoring and review of these changes is important in ensuring future development plans are consistent and feasible.

## Education of the Value and Role of Tourism

Tourism is one of the world's largest employers and yet many communities are unsure of the benefits of tourism. The economic benefits are often the easiest to measure and the most effective, however the social and environmental benefits of tourism including protection of natural and cultural assets, supporting local events and cultural practices and provision of services and public facilities should not be overlooked. For this reason effective destination managers should regularly engage in education and advocacy of the benefits of tourism with local influencers and key community stakeholders. This includes elected representatives, leaders of business and industry, community and environment groups, and residents.

Examples of successful education and awareness raising campaigns include:

- Workshops and presentations with elected representatives through the 'Local Government Pathways Program';
- Hosting 'Tourism Week' celebrations in the Mackay Whitsundays regions;
- Promotional campaigns where local businesses highlight that "tourism is everybody's business" (Tourism Australia);
- Economic modelling of the benefits of tourism;
- Signage / promotion of the businesses that benefit from tourism expenditure through signage, stamps on cheques, or notices to suppliers; and
- Publications that promote the benefits of tourism such as those developed by State Tourism Organisations and the Tourism Industry Council.

### Destination Management Tip

State and National Tourism Organisations provide valuable statistics, research and resources that can be used to communicate the value of tourism over time.

For further information on the education of the value and role of tourism see the section on 'Contribution of Tourism' as part of the Destination Planning phase of destination management.

## Tools and Case Studies

Tourism is a global industry that has played a significant role in the development of many destinations and communities. With the introduction of the concept of destination management, many destinations have had to adapt their approach to tourism planning and development in order to ensure the long-term sustainability of the industry in their destination. There are a wide range of tools and best practice case studies that are available to assist destination managers and tourism stakeholders in identifying and implementing innovative and relevant planning, development and marketing processes for managing tourism in a destination.

The Sustainable Tourism Cooperative Research Centre (STCRC) has leveraged the knowledge and skills of a wide range of industry experts and researchers in order to investigate and develop a suite of tools and case studies to aid in effective destination

management. The range of resources provided in this portal, drawn from the STCRC and other industry sources around the world, include online tools and applications, strategic planning guides and templates and best practice case studies. These tools and case studies have been divided by the relevant phase of destination management:

- Destination Planning – tools and case studies to assist destination managers and stakeholders to understand the tourism destination and the environment in which it operates and to identify and develop innovative strategies and actions to implement sustainable tourism development;
- Implementation – tools and case studies to assist destination managers in implementing the strategies and actions identified by stakeholders to achieve the strategic direction and vision of the destination and to ensure the long term sustainability and growth of the industry;
- Destination Performance – tools and case studies to assist destination managers to quantitatively and qualitatively monitor and evaluate their performance as a tourism destination and to identify strategies to improve performance and achieve sustainability over time.

Please use the links below for more information on a range of destination management tools and case studies that are available.

## Destination Planning Resources

Effective destination management needs to be underpinned by an extensive and ongoing planning process that considers the tourism environment and stakeholder interests and develops an appropriate strategic direction for the development of the destination. The Sustainable Tourism Cooperative Research Centre has developed a number of destination planning tools and case studies that can assist in strategic planning for a destination, including:

- General planning frameworks and guides;
- Risk management planning;
- Data collection program development;
- Evaluating and communicating the contribution of tourism;
- Local government planning;
- Strategic planning case studies at a destination level; and
- Climate change impact case studies

Please see below for a range of tools and case studies that can be used to assist in the destination planning phase of destination management.

We are committed to providing a wide range of resources to support destination managers and tourism planners in strategic planning for tourism destinations. Please visit the 'Contact Us' page if you would like to recommend any additional destination planning tools or case studies that could be included on the portal.

## Implementation Resources

Developing and marketing a destination should be based on the strategies and actions identified in the planning phase of destination management. A number of tools and case studies have been developed to assist destination managers in implementing the strategic direction for tourism in a destination including a range of resources developed by the Sustainable Tourism Cooperative Research Centre for:

- Tourism destination branding;
- Interpretation evaluation;
- Service quality enhancement;
- Visitor information service provision;
- Marketing and communication;
- Motel makeover and renovation;
- Local government involvement in tourism development;
- Best practice regional destination development; and
- Innovation in destination development.

Please see below for a range of tools and guides that can be used to assist in the implementation phase of destination management.

We are committed to providing a wide range of resources to support destination managers and tourism planners in tourism development. Please visit the 'Contact Us' page if you would like to recommend any additional destination implementation tools or case studies that could be included on the portal.

## Destination Performance Resources

Ongoing measuring and monitoring of destination performance is essential for continuous improvement and development of a sustainable approach to tourism in a destination. There are a wide range of tools and programs available to assist destination managers in monitoring and evaluating performance including measuring organisational, destination-wide, environmental, social and economic performance. Destination performance tools and case studies developed by the Sustainable Tourism Cooperative Research Centre include resources for:

- Tracking organisational performance;
- Tracking destination-wide performance;
- Sustainability benchmarking and certification;
- Evaluating event performance;
- Risk management and evaluation;
- Data collection programs;
- Local government performance in destination management; and
- Sustainable tourism best practice case studies.

Please see below for a range of tools and guides that can be used to assist in the destination performance phase of destination management.

We are committed to providing a wide range of resources to support destination managers and tourism planners in monitoring and managing destination performance over time. Please visit the 'Contact Us' page if you would like to recommend any additional destination performance tools or case studies that could be included on the portal.

# Sustainable Tourism – Destinations and Communities



## What is Sustainable Tourism Online?

Sustainable Tourism Online is a comprehensive online information resource to support sustainable policy, planning and practice.

## What Information is available?

Sustainable Tourism Online provides credible national and international research, knowledge and tools captured within three main sustainability theme—Destinations and Communities, Business Operations and Parks and Culture. It also delivers relevant information on broader sustainable themes and global best practice.

## Additional features

Sustainable Tourism Online includes an interactive, real-time communication platform for sector professionals to engage in discussions on sustainable tourism issues, challenges and opportunities.

## Check it out

### [www.sustainabletourisonline.com](http://www.sustainabletourisonline.com)

Sustainable Tourism Online has been developed by Sustainable Tourism Cooperative Research Centre (1997–2010) as a resource to facilitate ongoing discussion and distribution of knowledge and tools to support sustainable tourism.

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