Research Paper

Destination Innovation Matrix: A framework for new tourism experience and market development

Sarah Gardiner*, Noel Scott

Griffith Institute for Tourism, Department of Tourism, Sport and Hotel Management, Griffith Business School, Griffith University, Gold Coast Campus, QLD 4222, Australia

ABSTRACT

Destination managers must consider whether to continue to consolidate their experiences and markets or innovate by developing new experiences and targeting new markets when planning their tourism destination development. Although these approaches are not mutually exclusive, adopting a strategic approach to identifying which experiences will be iconic visitor drawcards featured in the destination's brand image and marketing, and which markets to focus their marketing efforts on, is important to destination competitiveness. Most destination managers adopt a consolidation strategy because this is often the most efficient, safest and least controversial approach. The alternative is to innovate through developing new experiences and attracting new visitor markets to expand the destination's appeal. This paper studies this destination development challenge in a popular, yet mature tourism destination, the Gold Coast, Australia. Four experience development strategy options are proposed and organised into a Destination Innovation Matrix. These options are then tested using an online survey (N = 1759), followed by four focus group interviews. This matrix provides a new framework to assist managers to prioritise innovation opportunities for a destination.

1. Introduction

Creating perceived newness through innovation in the destination experience offering is at the forefront of destination marketing and management theory and practice (e.g. Carlisle, Kunc, Jones, & Tiffin, 2013; Hjalager, 2010; Hjalager & Nordin, 2011; Rodríguez, Williams, & Hall, 2014; Souto, 2015). Innovation in destinations has traditionally been organic, market-led and incremental (Weaver, 2012). However, some governments are now playing a more proactive role in shaping the experience mix of their destination, using policies, laws, regulations and, in some cases, co-investment in tourism experiences to influence outcomes. Weaver (2012) considered that this convergence of organic, incremental innovation and government-led development can lead to sustainable mass tourism.

In order to influence and create a shared vision for tourism development, some destinations have prepared destination tourism management plans (DTMPs). These plans have a destination management rather than destination marketing focus, thus, destination experience development and innovation are central. Such a plan is usually government-led and developed in consultation with tourism operators and other stakeholders in the destination. The plan typically aims to articulate the tourism development objectives and priorities of the destination, aligned with the tourism vision for the destination. This planned approach is seen as a way to influence market-led development and improve the management of tourism in destinations to achieve economic, social and environmental imperatives of the tourism stakeholders and host community (Moscardo, 2008; Scott & Cooper, 2010). Innovation is often a central part of these plans. This more sophisticated approach to destination management focuses on innovation as a means to enhance, improve, and in some cases diversify the destination experience offering.

The quest for new tourism experience offerings is particularly important for destinations that are suffering from stagnant or declining visitation because it is a way to renew interest among consumers in visiting. Ways to create destination newness through experience development range from small step incremental innovations or enhancements that may improve the experience for existing visitor markets to new major tourism attractions that simulate visitation to a destination. These major tourism attractions are here termed 'tourism experience drawcards' (Benur & Bramwell, 2015). These drawcards are central to consumers' perception of the destination brand image, that is, how a destination is perceived in the minds of consumers. If developed strategically, tourism experience drawcards will complement the desired destination brand image to build the Destination Marketing Organisation's (DMO's) preferred image in the minds of consumers. Tourism experience drawcards are typically high volume experiences that create

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* Corresponding author.
E-mail addresses: s.gardiner@griffith.edu.au (S. Gardiner), noel.scott@griffith.edu.au (N. Scott).

Table 1
Key terms and definitions.

Term	Definition in this study	Informed by:
Destination experience improvement	Cultivating and developing *existing experiences* to make the destination more competitive than its current offering.	Johnston and Kong (2011)
Destination experience diversification	Expansion to develop *new experiences* to create more diverse and varied experiences in the destination experience offering.	Benur and Bramwell (2015); Peters & Pikkemaat (2006)
Experience-market innovation	Creating newness in existing experiences, developing new experiences and/or attracting new markets to the destination.	Hughes et al. (2010)
Tourism experience drawcards	Major tourism attractions that simulate visitation to a destination.	Benur and Bramwell (2015).
Destination image	Mental picture, perceptions and representations associated with the destination in the minds of consumers.	Pike (2016).
Incremental destination innovation	Small step changes to the destination experience offering, created by improvements to or enhancements of an existing experience and/or consumer market.	Souto (2015); Wei et al. (2014).
Radical destination innovation	Big leap changes in the destination experience offering through introducing a new experience and/or attracting a new consumer market to the destination.	Souto (2015); Wei et al. (2014).

visitor demand for the destination. Destinations can have existing tourism experience drawcards, such as the Eiffel Tower in Paris or Disneyland in California. They can also create new tourism experience drawcards, particularly to leverage natural, cultural or man-made environments. Examples include the Langkawi Sky Bridge in Malaysia and the Museum of Old and New Art (MONA) located in a winery in Australia. They can also be more niche experiences, such as small group activities and cultural experiences that add to the destination experience mix and generate interest and novelty (Benur & Bramwell, 2015). Examples include special-interest sporting activities and events, and food-and-cooking experiences. Identifying and developing new tourism experience drawcards as part of an innovation process is a central part of a more planned, strategic approach to destination development.

The discussion above uses the term 'experience development' rather than 'product development' the strategic marketing and innovation literature innovation relating to targeting new markets the concept of product-market innovation (e.g. Hughes, Martin, Morgan, & Robson, 2010; Wei, Yi, & Guo, 2014). Given the experiential, co-creative nature of tourism (Prebensen, Vittersø, & Dahl, 2013), this paper refers to experience innovation, although it acknowledges that both of these terms are referred to interchangeably in the tourism literature. This paper therefore employs these concepts to refer to experience-market innovation.

Much of the tourism research on experience-market orientation concentrates on business-level innovation strategies, relating to hotels (de la Peña, Núñez-Serrano, Turrión, & Velázquez, 2016; Nieves & Segarra-Ciprés, 2015; Thomas & Wood, 2014), restaurants (Lee, Hallak, & Sardeshmukh, 2016) and technology (Aldebert, Dang, & Longhi, 2011). Yet, there are some conceptualisations of experience-market innovation at the destination-level. For example, Aarstad, Kvitastein, and Jakobsen (2015) discusses specialisation and diversification of experiences in destination development, discussing the concept of knowledge sharing within the industry and with other industries to leverage related and unrelated variety. Similarly, Carlisle et al. (2013) studied multi-stakeholder participation in destination innovation strategy-making. Of particular relevance to destination innovation and experience-market growth, Benur and Bramwell's (2015) conceptual model considers opportunities to concentrate or diversify the destination's experience offering, suggesting that there should be fluidity between the demand (end-user) and supply (experience) in the destination's experience/product development strategy formulation and assembly. Benur and Bramwell (2015) propose a matrix-based model to assess the experience development options for destinations such as concentrated or diversified niche or mass tourism development depending on the intensity and diversity of experiences. Shaw and Williams (2009) propose that incremental innovation – that is, small shifts in the experience-market orientation – may only require additive knowledge, however more radical changes in the experience-market orientation require substantial knowledge acquisition.

Despite some advances in the conceptualisation of destination innovation and an emergent body of research in tourism on the stakeholder and knowledge structures that promote it, empirical studies that inform destination innovation theory and practice are lagging interest in this topic, particularly for a consumer-led perspective. Indeed, several tourism researchers have called for further academic research to advance understanding on innovation in tourism and, specifically, relating to destinations. Benur and Bramwell (2015) stress that, "There is a need for more research with a consistent focus on understanding the features and relationships associated with primary tourism products in destinations" (p. 222). This intent is also echoed by Hjalager and Nordin (2011) who, based on their review of innovation methodologies, conclude that there is a need for more end-user demand-driven innovation research in tourism to advance understanding, and warns, "There is still only limited systematic and comparable empirical evidence of the level of innovative activities and their impacts and wider implications for destinations and national economies" (p. 1). Narduzzo and Volo (2018) suggest that, "Conceptual and prescriptive studies on tourism innovation are often rooted on models originated in the manufacturing and industrial literature, showing little evidence of empirical applications in tourism" (p. 745). Thus, empirically grounded theory building that advances understanding of the process of experience-market innovation in tourism destinations from the end-user demand perspective is important to further understanding.

This study intends to address these gaps through studying consumer demand for new and existing experiences in a mature tourism destination. In doing so, the study aims to further understanding of tourism experience innovation at a destination-level. To achieve this aim, the paper will first present a theoretical strategic planning model underpin by the literature. This model seeks to enable destination marketers and mangers to evaluate the current and potential experience-market orientation of the destination in order to strategically identify potential destination experience drawcards targeted at specific markets. The model will then be applied in a destination to demonstrate its relevance and practicality within a specific site. Table 1 summarises key terms used in this study. The following section explains the theoretical framework for this study.

2. Theoretical framework: Destination Innovation Matrix

Boosting business performance through diversification (e.g. Benito-Osorio, Ángel Guerras-Martín, & Ángel Zuñiga-Vicente, 2012; Su & Tsang, 2015) and entering new product markets (Kim, Min, & Chaiy, 2015; Skilton & Bernardes, 2015) are established fields of study in the business management literature. Ansoff's (1957) seminal paper on strategies for diversification conceptualised four product-market quadrants to grow business through market penetration, product and market growth and diversification. Derivatives of this matrix were later popularised by organisations such as the Boston Consulting Group with
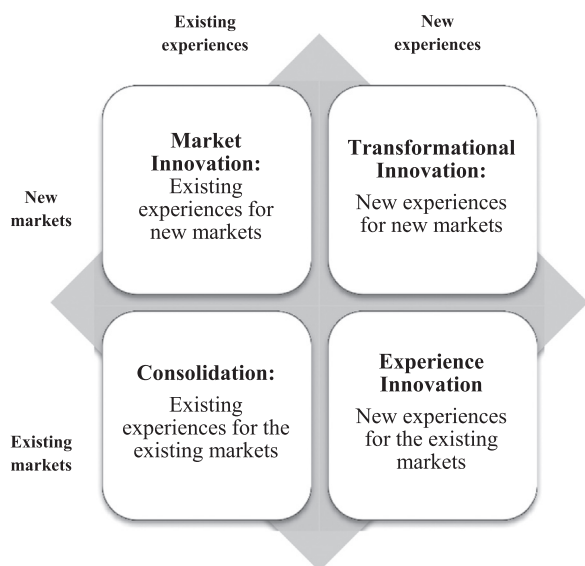
Existing experiences   New experiences

New markets

Market Innovation:
Existing experiences for new markets

Transformational Innovation:
New experiences for new markets

Existing markets

Consolidation:
Existing experiences for the existing markets

Experience Innovation
New experiences for the existing markets

Fig. 1. Destination Innovation Matrix.

its business unit growth-market matrix. These types of matrices are now part of mainstream business practices, used to analyse product-market potential. They also allow businesses to explore their current product position in existing markets, that is, markets the business currently services, as well as, new markets, that is, markets the business is not currently attracting. Opportunities to develop and diversify their products for new markets can also be assessed. This paper draws upon these product-market growth models to present a new framework to develop destination tourism management strategy for experience-market innovation. Fig. 1 presents this framework, titled the Destination Innovation Matrix. This is a four-quadrant matrix that presents options for destinations to consolidate their experience-market offering or change that offering through marketing innovation, experience innovation or transformational innovation. This model was informed by the literature and then refined as a result of this study.

The Destination Innovation Matrix proposes four primary considerations when assessing the innovation potential of a destination and its experience-market orientation. The left side of the matrix presents the two incremental innovation options: consolidation and market innovation. Incremental innovation involves minor changes through improvements to existing experiences or shifts in the target visitor market (Ritala & Hurmelinna-Laukkanen, 2013; Souto, 2015). Incremental innovation results in less novelty and expansion of the destination experience offering. However, it is lower risk and cost than more radical innovation, but tends to result in less impact (Souto, 2015). The lower risk and cost of incremental innovation and not disrupting the status quo means many destinations choose to adopt a *consolidation strategy*. Resources are concentrated on consolidating the destinations existing position in the marketplace and attracting more of the visitors from the markets in which they current service, in particular, return visitors from established markets. When adopting this strategy, stakeholders focus on incremental innovation that improves experience design and delivery and makes the brand proposition more attractive to markets that currently find the destination experience offer appealing.

The second option is *market innovation*. This form of innovation seeks to incrementally shift the visitor profile through making the destination attractive to new visitor markets based upon the destination's existing product, resulting in incremental change to the destination's visitor profile. Experiences that are promoted as part of this strategy are new to the visitor target market, but are not new experiences in the destination. Therefore, this strategy aims to shift consumer brand associations through adding additional brand attributes (perceived new experiences) to the destination brand. This reconfiguration

of the experiences that changes the destination experience associations for consumers can produce innovation (Paget, Dimanche, & Mounet, 2010).

On the right side of the matrix are the radical innovation options: experience innovation and transformational innovation. These options aim to promote radical shifts in the destination experience offering – and, in turn, the brand – through the introduction of new experiences that currently do not exist in the destination. Radical innovation is described as a process of creative destruction resulting in revolutionary change, thus, it can result in a high degree of novelty, more opportunity and can be more impactful than incremental innovation, but presents significant challenges and risk given its disruptive effects (Souto, 2015). The advent of online sharing economy platforms is an example of disruptive effects of innovation in tourism (Dolnicar, 2017). One of the most prominent is Airbnb. This global sharing economy platform allows consumers to book directly with a 'local host' accommodation provider who may have a room or a whole house or apartment to loan. Private rentals have long been a part of the tourism industry, however, this global online platform reduces barriers to entry and affords the opportunity for accommodation providers to easily communicate with the global marketplace. This innovation circumvents the traditional tourism distribution system of travel retailers and wholesalers, resulting in disruption to tourism distribution systems and radical change in the way some tourism experiences are consumed.

Innovation in the experience offering of the destination is therefore considered radical innovation, because it has the potential to change the experiential attributes associated with the destination among consumers. It also results in new experiences introduced to the destination that departs from the existing experience offering, therefore has the potential to shake-up the destination experience mix and may impact on the existing experiences. For this reason, existing tourism stakeholders within a destination may be reluctant to pursue this innovation strategy as it could be seen as disrupting the status quo and a threat to their individual business interests. When embarking on *experience innovation* strategy destination stakeholders seek to create new and different experiences that will appeal to the destination's existing visitor markets. These experiences are typically new and different to the existing experiences on offer in the destination or can be extensions of the existing experience offer.

Another radical innovation strategy is *transformational innovation* where destination stakeholders depart from the present destination product offering and create new experiences that are different to the established product offering in the destination. This radical innovation disrupts the status quo (Brooker & Joppe, 2013) and results in radical transformation of the destination experience-market offering, creating new experiences. These new experiences are designed to appeal to and, ultimately, intended to attract new markets to the destination. The focus on new market development through new experiences creation, therefore, makes transformational innovation different from experience innovation. Given the disruption transformational innovation might cause, it may require organisational structural and operational change and the development of new skills and techniques. It may also require the building of new soft and hard infrastructure, services and facilities to support this change. However, this innovation has the potential to have far-reaching effects on the destination's competitiveness.

It is proposed that each experience drawcard within a destination should be considered in relation to the Destination Innovation Matrix. It is therefore likely that destinations will embrace a multi-pronged approach. That is, may embark on a strategy that comprises of consolidating existing experiences and markets and, at the same time, seek innovation of existing and new experiences and markets. Thus, consolidation and innovation are not mutually exclusive approaches, but should instead be considered simultaneously. Financial, human and physically resources and political goodwill should be considered when deciding of the strategic approach to destination innovation. Gaining additional resources, through government grants and funding and

private investment, should be investigated as part of the strategy. Reconfiguring existing resources should also be considered to allow to innovation. This research adopts a consumer-perspective, however acknowledges that other factors, such as government, stakeholder and investor viewpoints, should contribute to the approach a destination takes to experience and market innovation.

3. Case study: Australia's Gold Coast

A case study approach is employed to examine this model in a destination-context. Destinations are typically defined based on administrative and/or geographic boundaries. This research studies a regional tourism destination – the Gold Coast – a popular, yet mature tourist destination in Australia. This destination is defined by local government boundaries and is marketed by a single regional tourism organisation. Several local tourism organisations operate within this destination. State and national tourism organisations are also involved in its marketing and management. Thus, the Gold Coast works within a standard hierarchical destination marketing and management structure, as described by Pike (2016).

The Gold Coast is located on the east coast of Australia and is famous for its surf beaches and theme park attractions. During the early 1900s, the Gold Coast was a popular seaside escape for residents from the neighbouring city of Brisbane (Potts, Gardiner, & Scott, 2016). Fuelled by increased domestic aviation and car ownership and a post-World War II holiday boom in Australia, Gold Coast tourism flourished from the 1950s through to 1980s, attracting inter-state visitors mostly from the southern Australian cities of Sydney and Melbourne. The development of major theme park attractions and integrated golf resorts also peaked Australians' interest in visiting this beach resort city (Scott, Gardiner, & Dedekorkut-Howes, 2016). However, in the 1990s, domestic visitation numbers began to plateau and development of new major tourism drawcards stalled. As a result, in 1998 the destination launched the Gold Coast Visioning Project to revitalise the city's brand image in the mind of consumers (Moore, 2002). At this time, it was mostly considered a marketing problem and a re-branding exercise commenced (Potts et al., 2016). However, after several somewhat ineffective re-branding attempts, city planners realised the plateauing visitor numbers was more than just a branding problem, and the product (experience) element of the marketing mix was central to revitalising consumer demand for the destination. Hence, the city embarked on the DTMP process described in this case study. At the time of this research, the Gold Coast attracted 4.2 million overnight visitors per annum, of which approximately 80% were domestic visitors. Yet, the five-year average growth rate for domestic overnight visitors was zero (McLennan, Bec, Wardle, & Becken, 2015). The Gold Coast is considered an appropriate site to investigate because it is a mature destination with established domestic and international visitor markets. Mature destinations may undertake rejuvenation through a number of strategies (Pechlaner, Herntrei, & Kofink, 2009) including introduction of new attractions (Butler, 1980). This study has selected Gold Coast as it is a mature destination and has attempted to introduce innovations to increase visitor arrivals. This is a significant issue for many destinations around the world at or facing maturity.

An end-user (consumer) perspective is adopted to investigate this model given the importance of consumer user generated content in shaping the experience-based destination image and, ultimately, determining the success or failure of experiences and destinations. This study concentrated on the views of domestic visitors towards this destination as these visitors are the mainstay of Gold Coast's tourism visitation, representing approximately 80% of all visitors to the destination (Tourism & Events Queensland, 2017). The research adopts a post-positivist paradigm. This paradigm attempts to identify the imperfections in theories (Goodson & Phillimore, 2004). Thus, adopts a critical realism in the approach to the research (Henderson, 2011; Riley & Love, 2000). The study inductively derives findings from first understanding

the context of the research, then quantitatively testing the variables and, finally, qualitatively exploring the variables. Thus, a three-phase triangulated research process was adopted (Creswell, 1994; Decrop, 1999) to uncover the multiple truths or perspectives that inform this research. In doing so, this approach enriches the explanatory power of the research, not possible with a singular approach (Beeton, 2005).

The first phase of the study involved reviewing existing tourism research and strategic planning documents to define the current status of the destination and the forward looking strategic intent of destination stakeholders. Over 20 documents from governments and DMOs from the national, state and local levels relating to consumer demand for experiences informed this research process. This phase was particularly important to identifying the experiences to be tested in the second phase and to contextualise the findings. The experiences selection primarily based on those identified in the Gold Coast DTMP, however the researchers also meet on several occasions will local stakeholders to ensure their interpretation of this documents and other supporting documents was consistent with their planning intent.

The second phase of research was a consumer survey. Questions about holiday experience preferences were firstly asked without reference to the Gold Coast, and then destination specific perceptions and preferences were obtained. The Gold Coast specific questions examined the respondent's likelihood of participating in new and existing experiences. Single items were used to measure each experience. The experiences (items) were measured on a seven-point Likert scale (appeal when holidaying in Australia: 1 – unappealing to 7 – extremely appealing; likelihood of participating in the activity when visiting the Gold Coast: 1 – very unlikely to 7 – very likely). The current perception of the Gold Coast destination experience attributes was measured on a five-point Likert scale. The survey was pilot-tested with 19 tourism industry professionals and then administered by a market research company to an online Australian survey panel. Age and gender quotas were imposed on the sample to promote a sample representative of the Australian population over 18 years in the three main source markets of Sydney, Melbourne and Brisbane. SPSS was used to generate descriptive statistics from this data. There were 2579 responses: however 820 responses were excluded because they were incomplete or were from Gold Coast residents. Accordingly, the survey results are based on 1759 fully complete questionnaires.

Most (84%) of survey respondents have visited the Gold Coast before. Sixty percent of the sample had visited the Gold Coast in the past five years. Of those respondents who had visited the Gold Coast, over half of survey respondents reported going to the beach (52%) and shopping (55%) on their last Gold Coast holiday. Visiting a theme or wildlife park was also a popular activity (47%) on their last Gold Coast holiday. Over half of the sample was from Sydney and Melbourne (26% respectively) and 14% were from Brisbane. The age profile of respondents included: 13% were 17–29 years, 20% were 30–39 years, 18% were 40–49 years, 20% were 50–59 years and 29% were over 50 years. There was a slight gender bias to the sample were 57% females and 43% male respondents. The survey data was analysed to inform the development of the protocol for the subsequent qualitative phase.

The final phase of the research involved four focus group sessions in Melbourne, a main source tourism market for the Gold Coast. Two focus groups were undertaken with singles and couples without children living at home and two focus groups with families (singles and couples with children living at home). There was a mix of ages and gender each group. Participants were recruited by a professional focus group panel provider company. There were between five and eight participants in each session and the total sample was 32. The aim of this phase of data collection was to unpack the findings from the survey phase, particularly to understand the attitude towards the experiences and their likelihood of participation as part of a Gold Coast holiday, if the experiences were available. A semi-structured interview protocol was adopted to ensure the key experiences were discussed, as well as, there was opportunity for more organic exploration of participants' views and
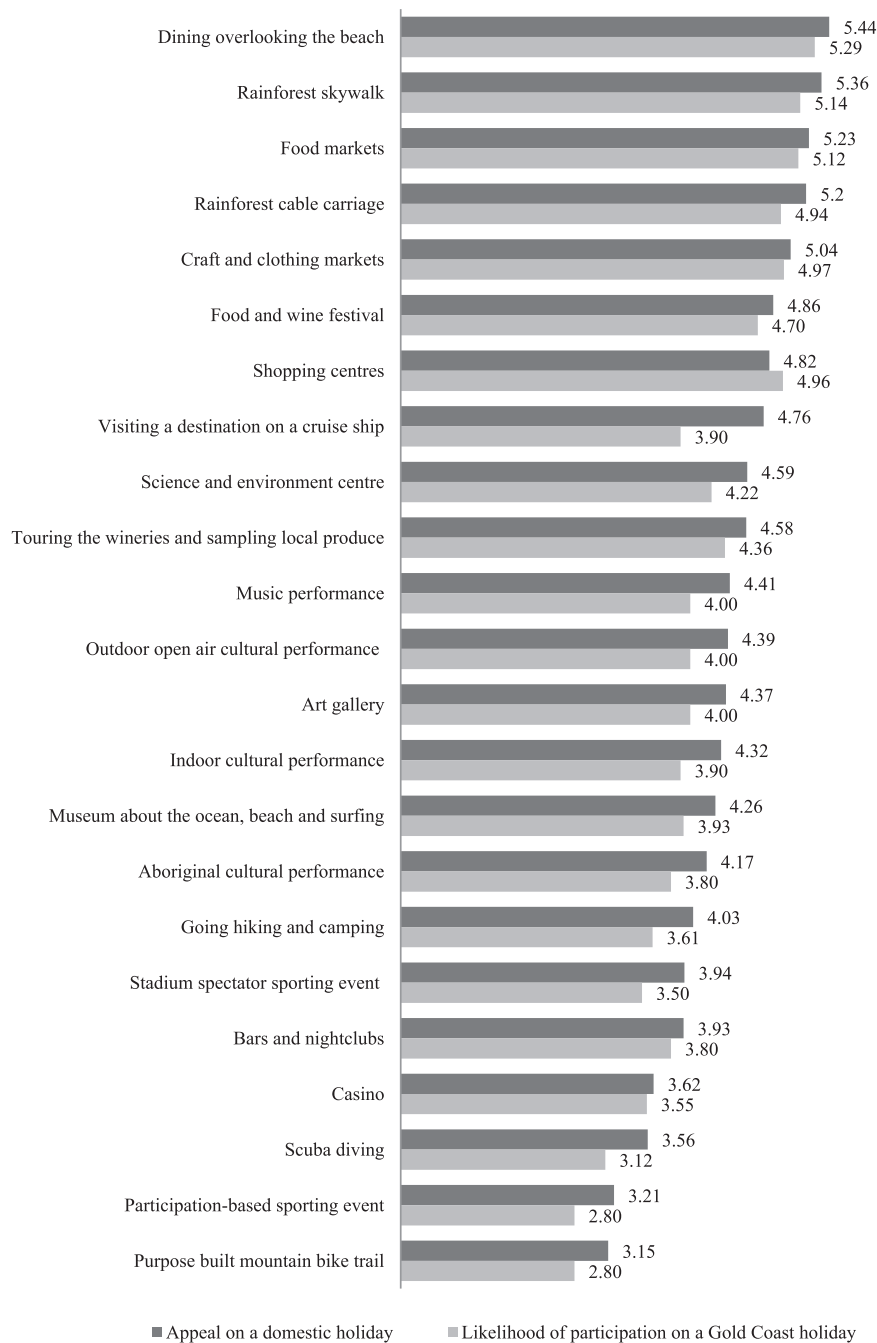
Experience	Appeal on a domestic holiday	Likelihood of participation on a Gold Coast holiday
Dining overlooking the beach	5.44	5.29
Rainforest skywalk	5.36	5.14
Food markets	5.23	5.12
Rainforest cable carriage	5.2	4.94
Craft and clothing markets	5.04	4.97
Food and wine festival	4.86	4.70
Shopping centres	4.82	4.96
Visiting a destination on a cruise ship	4.76	3.90
Science and environment centre	4.59	4.22
Touring the wineries and sampling local produce	4.58	4.36
Music performance	4.41	4.00
Outdoor open air cultural performance	4.39	4.00
Art gallery	4.37	4.00
Indoor cultural performance	4.32	3.90
Museum about the ocean, beach and surfing	4.26	3.93
Aboriginal cultural performance	4.17	3.80
Going hiking and camping	4.03	3.61
Stadium spectator sporting event	3.94	3.50
Bars and nightclubs	3.93	3.80
Casino	3.62	3.55
Scuba diving	3.56	3.12
Participation-based sporting event	3.21	2.80
Purpose built mountain bike trail	3.15	2.80

■ Appeal on a domestic holiday   ■ Likelihood of participation on a Gold Coast holiday

Fig. 2. Appeal of experiences for Australians on a domestic holiday and likelihood of participation during a Gold Coast holiday.

attitudes. Accordingly, each session began with some general discussion about Australian holidays, followed by questions relating to the perception of the Gold Coast and its holiday experience offering. The interview questions in the first part of the session begun by exploring their attitude towards holidaying in Australia more generally. Participants were asked to identify their favourite Australian holiday destination. Probing questions were then asked to find out what they liked most about this destination, what they did there and where did they stay, and what makes it special and memorable. The role of holidays more generally in their lifestyle and their views on Australia beach holiday destinations, in particular, were then explored. Questioning then focused specifically on the Gold Coast as a holiday destination. Participants were questioned regarding their perceptions of the overall brand image of the Gold Coast and asked to describe experiences and

places they associate with the Gold Coast. The second part of the session concentrated on asking participants about their views of particular experiences. Photos of 12 new and existing experiences on the Gold Coast were then distributed to focus group participants along with a word chart naming these experiences. Participants were asked to discuss their preferences (likes and dislikes) in terms of these experiences. Each focus group session was approximately 45 min in duration and was voice recorded. There were two interviewers in each session. The first interviewer asked most of the questions and facilitated the session. The second interviewer monitored the group to ensure no person was dominating the discussion and that all participants contributed to the discussion. Both interviewers asked probing questions. The transcripts were transcribed verbatim and analysed according the experience themes.

4. Findings

The findings are organised based on experience themes. The fit of the experience themes into the quadrants of the matrix are discussed in each section.

4.1. Beach and theme park experiences

Both the survey and focus group analysis reveal that the Gold Coast has strongly embedded images among Australians of its experience offering. The Gold Coast is primarily perceived by Australians as a theme park and beach destination. Having theme parks and attractions to visit ($M = 4.34$) and beach activities and experiences ($M = 4.18$) scored highest in the destination experience attributes tested in the survey on a five-point Likert scale. Theme park and beach experiences dominated destination brand perceptions of focus group participants. Most participants felt the Gold Coast has a limited depth beyond these experiences. For example, one participant commented that the Gold Coast is, "mainly the theme parks and Cavill Ave [a main tourism shopping street in Surfers Paradise on the Gold Coast] and that's really it". Another participant stated, "In the media and all that, it's always the same, it's always promoting the beaches and the theme parks. So I don't know what else Gold Coast has to offer besides that". At the time of data collection, the destination brand was 'Famous for Fun' which focused on promoting the existing product offering – that is, beach, theme park and shopping – to their existing visitor market, being working class Australian families and young couples/singles. This approach leveraged the destination's strengths in these experience themes. These themes also reflected the businesses offered by the existing DMO membership and that governed the DMO board. These findings suggest that, prior to the introduction of the DTMP and at the time of data collection for this study, the Gold Coast adopted a consolidation strategy. However, the government sought to change the experience-based destination marketing of the Gold Coast through the introduction of a DTMP in 2014. These plans were developed for each of the major tourism regions in Queensland, competing destinations, such as Cairns and the Sunshine Coast, therefore also had these plans. However, none of the other regions conducted consumer research akin to that presented in this paper.

4.2. Ranking of experiences

To be more innovative and strategic in its approach to destination management, the Gold Coast developed a DTMP that identified eight catalyst projects for the Gold Coast. This research concentrated on five specific projects that stakeholder viewed were potential tourism experience drawcards for the destination. These were the construction of a new arts and cultural precinct, cruise ship terminal, man-made ocean dive attraction, forest mountain bike trail and surf museum. Four existing experience themes were also identified in the DTMP: beaches and waterways, rainforest, theme parks and entertainment (e.g. shopping, events, and nightlife). To determine the types of experiences the Gold Coast should develop to improve its attractiveness as an Australian holiday destination, the appeal of 23 experiences available on Australian holiday and the likelihood of participating in these experiences if they were available on the Gold Coast were tested with responses given on a seven-point Likert scale. Fig. 2 shows the results.

4.3. Food experiences

Food tourism experiences are particularly appealing with dining overlooking the beach ($M = 5.44$), food markets ($M = 5.23$) and a food and wine festival ($M = 4.86$) among the 'top five' of all products tested. However, further investigation of food tourism experiences in the focus group interviews revealed that participants were interested in travelling to well-known food and wine regions in Australia, but felt Queensland and Gold Coast did not have a strong food tourism reputation and,

therefore, this experience was not attractive enough to be a drawcard. One focus group participant commented, "I'm sure there's probably heaps of restaurants up there, [but] you don't see it as [that], you know, like South Australia's a food destination and like Melbourne is quite a food destination". Similarly, another participant stated, "When you think of the main places in Australia for good food and wine, you don't generally think Queensland". Instead participants thought the Queensland and Gold Coast food experience offer was only part of the overall destination experience. One participant suggested "It's a whole experience rather than just travelling for food and wine". Likewise, another participant commented "If I chanced upon a market I would go, but I wouldn't necessarily plan a trip around going to a market or a food festival". Thus, food tourism is a potential demand generator for the Gold Coast. At present, however, food tourism is not currently associated with the Gold Coast experience offering and not a primary motivator to book a trip to the Gold Coast. Instead it is perceived as contributing to the overall appeal of the destination. These findings suggest that improving awareness of existing food tourism experiences may attract new markets to the Gold Coast. This approach would be considered a market innovation, because it involves promoting existing experiences to attract new markets.

4.4. Rainforest and nature-based experiences

Another experience type that would attract new markets using existing experiences is nature-based tourism and, specifically, experiences in the rainforest. However, the association between the Gold Coast and this type of experience offering is poor. This study found that nature-based and rainforest experiences did not feature vividly in Australians' perception of the Gold Coast experience. Only 12% of survey respondent reporting visiting the rainforest on their last trip to the Gold Coast and respondents were neutral about the association between Gold Coast and rainforest and nature-based experiences ($M = 3.10$). The focus group research reinforced these findings. For example, one participant stated, "It seems like the place that would [have rainforests], but I wouldn't know". However, rainforest experiences were popular among domestic consumers when considering Australian holiday destinations.

Two specific rainforest experiences were tested because they were identified in the Gold Coast DTMP as potential mass tourism drawcards for the destination. These experiences – walking on a skywalk in the rainforest with spectacular views ($M = 5.36$) and riding a cable carriage through the trees in the rainforest ($M = 5.20$) – were seen as appealing when holidaying in Australia by survey respondents. Importantly, respondents also felt they were likely to participate in these products, if they were available on the Gold Coast ($M = 5.14$ and 4.94, respectively). A high level of interest in rainforest experiences was also evident in the focus group interviews. Participants thought that you would expect to find rainforests in Queensland but did not know if the Gold Coast had rainforests close by. One participant comments, "I might be a bit naïve, I wasn't actually aware that it was there, so that seem quite interesting to me. And it's something completely different to what I've had in my mind of the Gold Coast". The novelty of the proposed skywalk and cable carriage rainforest experience products generated interest among focus group participants, with one participant stating, "Yeah, I do like the sky walk in the rainforest, just because I feel when you think of Queensland you don't initially think of that, so it's a nice other option". In reference to the skywalk, another participant suggests, "I think it would be a more fun way to see the rainforest than just walking flat". Having seen a skywalk in another Australian tourism destination, one participant comments, "I did the sky walk in Tassie [Tasmania]…which was awesome, I loved it. So, yeah if they could do that sort of thing in Queensland, fantastic". This research therefore suggests that developing rainforest-based experiences, particularly experiences with a novelty factor, such as a skywalk or cable carriage, would be appealing to Australian consumers and generate demand for

the destination. They therefore have the potential for transformational innovation in the destination experience offering.

4.5. Underwater attraction and mountain biking experiences

Another two potential catalyst projects identified in the Gold Coast DTMP that were less popular among the overall sample were scuba diving and mountain-bike riding on purpose-built infrastructure. Scuba diving was not appealing, in general (M = 3.56), when holidaying in Australia, and respondents reported that they would be somewhat unlikely to participate in it if it was available on the Gold Coast. The focus group research suggests that visitors had limited time on holidays therefore did not want to invest that time in learning to dive for the one experience and the high price of this product was also viewed as prohibitive for some people.

The Gold Coast has developed mountain-bike trails as part of its hosting the 2018 Commonwealth Games and the Gold Coast DTMP indicated that these trails could be redesign to attract leisure visitors following that event. Thus, going mountain-bike riding on purpose-built trails was tested in this research. However, the research found that this activity was even less appealing than scuba diving on an Australian holiday (M = 3.15) among the overall sample and most respondents were unlikely to participate in mountain- bike trail riding if it was available on the Gold Coast (M = 2.80). These results suggest that a man-made scuba diving attraction and mountain-bike riding attraction would be new to the Gold Coast and appeal to new niche markets, thus is considered transformational innovation. However the impact of these development on average visitation to the destination would be marginal given the size of the overall visitor numbers to the Gold Coast and thus, would not be significant mass tourism drawcards.

Based on the survey result, a modified underwater product was also considered in the focus groups – an underwater sculpture trail in the Gold Coast harbor area that people could access for the beach. Focus group participants thought this experience was easy (no prior experience or skills required), accessible to all family members (both adults and children could participate) and thought it was a new experience and something different for the Gold Coast destination experience mix, thus, viewed this potential new experience favorably. An underwater sculpture trail is therefore consider a potential product innovation for the Gold Coast because it would be a new experience that would appeal to the existing visitor markets to this destination, giving them another reason to visit and potentially prompt past visitors to return to the destination.

4.6. Cultural experiences

In relation to the proposed cultural precinct development, there was some interest in outdoor cultural festivals (M = 4.57), outdoor open air cultural performance (M = 4.39), an art gallery (M = 4.37) and indoor cultural performance (M = 4.32). However, respondents indicated that they were neutral or unlikely to participate in these products on the Gold Coast (M = 4.34, 4.05, 4.00 and 3.89, respectively). Similarly, a proposed surf museum project did not perform well, with low appeal (M = 4.26) and likelihood of participation (M = 3.93). However, the focus group findings suggested rethinking the design of these cultural attractions to account for the warm climate and mostly sunny weather on the Gold Coast could generate demand for these attractions. For example, one participant commented, "I have no desire to go to such a beautiful, sunny place and then stay inside and look at pictures". Reflecting this viewpoint, focus group participants generally indicated a preference of outdoor exhibition and performance spaces. An outdoor open-air cultural performance ranked higher than an indoor cultural performance in the survey. Similarly, although respondents were neutral in the appeal of a surf museum as part of an Australian holiday, focus group participants express some interest in this cultural attraction when discussed in relation to visiting the Gold Coast given the strong connection between the Gold Coast and surf culture. Hence, they indicated that the themes explored in the museum should be closely linked to the destination because when, "I'm going to a specific place, I want to learn about a specific place". However, more generally, focus group participants felt that Queensland and the Gold Coast's reputation for delivering good cultural tourism experiences is poor. For example, one participant states, "I don't know why, but for some reason there is some cultural missing about Queensland, whereas almost all places in Australia have something that makes them cultural". Another participant suggests that its part of the overall destination experience, but not a reason to travel, commenting:

> See we're a bit spoilt down here in Melbourne because there's a musical, cultural festival even on every second week … but if it was something like that up there, and it would just be another reason, another tick a box thing to justify going up there, but it wouldn't be a sole reason for going.

The lack of brand association between the destination (Gold Coast, Queensland) and cultural tourism experiences is problematic for the development of cultural tourism product. Furthermore, there was a lack of general interest among Australian consumer for art galleries and live performance as part of an Australian holiday. Opportunities to learn about the place and its environment in creative spaces were more popular, for instance the science and environment center and surf museum concepts showed some potential in terms of interest in these attractions and likelihood of participation on the Gold Coast, if they were available.

4.7. Summary of findings

Fig. 3 summarises the findings from this research. Food, culture and nature-based experiences are key drivers of domestic consumer tourism demand identified in this research. These experiences are particularly appealing to affluent families and couples and, thus, could attract a new potentially higher yielding market to the Gold Coast. Given that the Gold Coast has existing product in these areas, a market innovation strategy could be employed to incrementally introduce new dimensions to the Gold Coast experiential brand to attract new markets that are interested in these experiences. For example, promotion of rainforest tours, dining overlooking the ocean or waterways and food and craft and clothing markets that currently exist on the Gold Coast may attract these new affluent markets to the destination and change the visitor
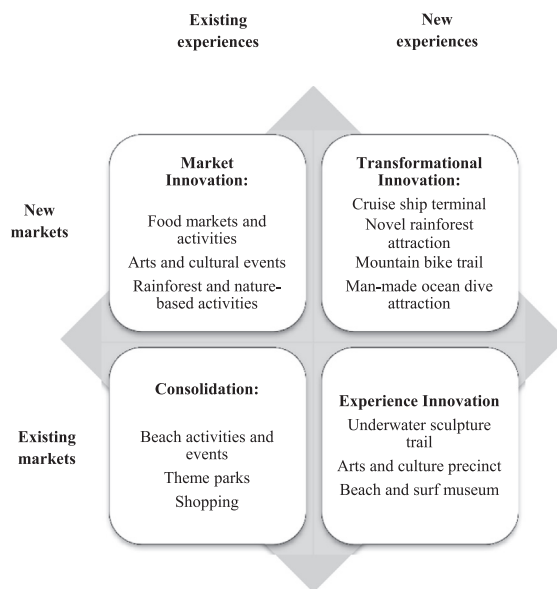

Fig. 3. The case study's Destination Innovation Matrix.

profile.

This research also suggests that the development of new attractions, mostly notably the underwater sculpture trail and surf museum, would be attractive to the existing market profile of the Gold Coast and offer new reasons to visit or return. Extensions to existing experiences, such as offering food experiences in the theme parks and markets as part of the shopping experience, would also be attractive to Gold Coast's existing visitor markets and could be part of the experience innovation strategy. This research suggests that transformational innovation would be facilitated through the construction of a new iconic rainforest attraction, a cruise ship terminal and a cultural precinct. These new experiences could potentially be mass tourism drawcards. More niche tourism drawcards, such as the development of a mountain bike trail and man-made ocean-dive attraction, would also attract new markets, but only from special interest markets.

5. Conclusion

This paper presents a Destination Innovation Matrix that may be used to analyse experience-market innovations in tourism destinations. This theoretical framework, and case study research that supports it, advances understanding of destination innovation in three principle ways. Firstly, the matrix applies notions of product-market innovation presented in the innovation literature (e.g. Hughes et al., 2010; Verhees & Meulenberg, 2004; Zhang, Wu, & Cui, 2015) in the context of destination marketing and management. In doing so, four strategic innovation options for destination as presented – consolidation, market innovation, product innovation and transformation – that identify different types of innovation strategy. There is an emerging interest in the tourism literature on experience diversification (e.g. Aarstad et al., 2015; Benur & Bramwell, 2015) and innovation (e.g. Aldebert et al., 2011; Brooker & Joppe, 2013; Hjalager, 2010). Given the infancy of this area of research, many of these studies are exploratory and present a typology or conceptual framework to begin to understand innovation in a tourism context. Yet, there has been little consumer-driven innovation research in tourism. This study therefore advances the tourism literature through adopting a consumer-led approach and presenting a new matrix that can be applied from a whole-of-destination perspective.

Secondly, the matrix clearly defines the different roles of destination marketers and destination planners in tourism innovation strategy. Although there is a significant body of knowledge on these roles as change agents and facilitators of destination competitiveness (e.g. Garrod & Fyall, 2017; Pike, 2016), there is an absence of strategy-based research (Pike & Page, 2014). Thus, understanding of their role specific to experience-market innovation is often neglected. This paper therefore provides some initial insights into improving the definition of these roles in innovation by proposing that destination marketers are principally responsible for marketing existing products to existing markets, as well as finding new markets for existing products. The focus on consolidating growth with existing markets or seeking new markets depends upon the innovation strategy of the destination: opting for consolidation or market innovation. We propose that a membership-based funding model of DMOs favours a consolidation strategy and, thus, impedes innovation, as DMOs need to look after their members (existing experiences) first. Increasing government subsidies of DMOs may help to rectify this issue, however often the board members of DMOs are owners and investors in existing tourism businesses, therefore decisions to introduce new experiences may be seen as a threat to their profitability. For similar reasons, destination planners also should be mindful of only consulting the existing industry as sources for ideas on new experience-market innovation: as was evident in the development of the Gold Coast DTMP. Broader consultation with investors and developers outside of the destination is therefore advisable to reduce local owner bias and resistance to proposals for more radical innovation.

Thirdly, the paper provides a case study of the mature tourism

destination that has sought to undertake revitalisation of their destination through tourism experience innovation. The research results presented based on this case study are conceptualised as a matrix to evaluate and assess destination innovation opportunities. Prior tourism research on innovation has mostly concentrated on business innovation (e.g. Pikkemaat & Zehrer, 2016; Weidenfeld, Williams, & Butler, 2010), therefore, expanding the concept of innovation to the destination-level contributes to the literature on innovation and destination competitiveness. This matrix could also be used to extend to develop innovation vector scores, similar to that proposed by Volo (2005) in her enterprise innovation matrix. Although Volo's approach adopts an economic modelling based approach to innovation matrices, integration of these approaches could be explored to deliver a more comprehensive understanding of experiences and their role in destination and economic development.

Another area of research warranting further research is investigating public-private partnerships in driving the delivery of new products in destination, of particular interest in the role of government and DMOs in this process. Destination marketers and planners do not often own or manage the products they market and manage. They can introduce voluntarily (e.g. accreditation) and involuntarily (e.g. laws and regulations) mechanisms to attempt to manage the visitor experience, but, ultimately, have limited control over the operation, marketing activities and investment in new experiences as this is controlled by business owners and investors. There are some examples of national-level tourism innovation programs (Mei, Arcodia, & Ruhanen, 2013), but these are in the minority. Destination marketers and planners therefore rely on cooperation and collaboration among the businesses that make up the destination brand and deliver on the brand promise in the visitor experience they produce. Narduzzo and Volo (2018) suggest that, given the complexity of tourism destinations, understanding the "web of interdependencies" (p. 739) within the tourism system that fosters innovation is important. In particular, research on the patterns, rules and evolution of these interdependencies is vital to grasping the potential to drive innovation creation.

Similarly, the innovation literature suggests that studying vertical and horizontal cross-ties and social networks in the context of destinations requires further investigation. Aalbers, Dolfsma, and Leenders (2016) study of cross-hierarchy and cross-unit ties in corporate project teams found that having a large number of these ties were important to promote innovation. It is therefore possible that, if managed effectively, the diversity of stakeholders in destinations could facilitate rather than hinder innovation in destinations. The staging of the innovation process in mature destinations also requires consideration. Can destinations be innovative and at the same time consolidate or should they focus on one approach at a time? The focus on one innovation approach at a time is described in the innovation literature as a monodextrous approach. In contrast, an ambidexterous approach involving multiple simultaneous innovations (as described in this paper) (March, 1991). Such innovation strategy decisions have been studied in a large company context, (e.g. Chang & Hughes, 2012; O'Reilly & Tushman, 2013; Wei et al., 2014), but there has been limited study in the context of tourism destinations. This research has found that innovation competes to scarce organisational resources, principally financial and human resources. Therefore, to be successful, destination entities need to re-organise their resources and/or obtain additional resources to innovate. Resource availability often drives the decision on what type of innovation strategy is adopted. There has been limited investigation of learning ambidexterity theory in tourism. The authors were only able to find four studies using this theory (Mihalache & Mihalache, 2016; Séraphin, Smith, Scott, & Stokes, 2018; Tang, 2014; Úbeda-García, Claver-Cortés, Marco-Lajara, & Zaragoza-Sáez, 2016). Yet, none of these studies investigated sequential or simultaneous innovation except Séraphin et al. (2018) which is the only study to explore these concepts at a destination level. This study provides a historical description of adopting a more ambidexterous approach in the context of Haiti, discussing current and

potential exploitative and explorative innovation opportunities, yet does not provide empirical consumer-based data to support the such approach. Thus, this suggests that this is an avenue for future research that should be explored in a tourism-specific context.

To develop a holistic perspective of this case study and to address the research objectives, this study adopted a sequential mixed methods approach. However, like all research, this study is not without its limitations. The authors acknowledge that, while all efforts were taken to be comprehensive, some tourism research and strategic planning documents may not have been included in the analysis. The researchers are embedded within the case study context and their personal background and viewpoints may have affected their interpretation of documents. This is consistent with the post-positivist approach adopted for this research. Furthermore, quotas were imposed on the survey and focus-group samples so as to concentrate on particular geographic localities, ages and life stages. Conducting the survey online and the focus group in only one location may have influenced the representativeness of the sample. Furthermore, a drawback of case study research is that it is often context-specific and therefore future research to replicate this methodology and the application of this matrix to other destination contexts is warranted. Future research should aim to further test and refine this model. Given consolidation strategy appears the norm for the global tourism industry, case research on destinations undertaking experience innovation and transformational change is imperative. From a practical perspective, such cases could act as catalyst to encourage other destinations to adopt more proactive innovative experience-market orientation in the future. The case studies would also stimulate more discussion among tourism academics about the application of innovation theory with tourism. Given that tourism is a global industry that is competing with other products and services for consumers, destination and business innovation should be an imperative for destination marketers and planners. Academics can play a vital role in informing this discussion, providing the theories, concepts and empirical research to drive advancement in tourism innovation.

Acknowledgments

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