

Competitiveness of **Tourism Destinations** and Opportunities for **Innovation** from the **Regional Competencies**

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Abstract | The experience economy brings an environment of opportunity for creating competitive advantages in tourism. In this context, the quest for innovation has become the main challenge for the industry and attracts interest for studies on the subject. Even in an exploratory phase, such studies allow a first fundamental differentiation between an approach that focuses on studies of innovation in business environments and a more recent approach that perceives innovation in tourism from a regional perspective. This paper is based on the regional perspective of innovation in tourism and proposes to contribute to the definition and theoretical characterization of what can be innovation in tourism destinations. The research uses a systematic literature search and documentation analysis for the comparison between concepts, characteristics and attributes of competitiveness for destinations that reflect the determinants of the experience economy, and the concepts, characteristics and attributes that identify and characterize countries and regions with innovative profile, or able to foster innovation. Comparison between results in a typology that can serve as a conceptual basis for guiding applied research on issues of innovation in tourism from the regional vision, and to contribute to the understanding of the factors determining the competitiveness of tourist destinations based on the imperatives of economy of the experiment.

Keywords | Tourism, Innovation, Destinations, Regional Competencies.

Resumo | A economia da experiência representa um ambiente de oportunidades para a criação de vantagens competitivas em turismo. Neste contexto, a busca pela inovação surge como o principal desafio para o setor e desperta interesse para estudos sobre o assunto. Mesmo em uma fase exploratória, tais estudos permitem uma primeira diferenciação fundamental entre uma abordagem que se centra nos estudos sobre inovação em ambientes empresariais, e uma abordagem mais recente que percebe a inovação em turismo desde uma perspectiva regional. Este artigo se fundamenta na perspectiva regional de inovação em turismo e propõe contribuir para a definição e caracterização teórica do que pode ser a inovação em destinos turísticos. O ensaio utiliza de pesquisa bibliográfica e documental sistemática para o cotejamento entre conceitos, características e atributos de competitividade para destinos turísticos que reflitam os determinantes da economia da experiência, e os conceitos, características e atributos que identificam e caracterizam países e regiões com perfil inovador, ou capaz de fomentar inovações. O cotejamento resulta em uma tipologia conceitual que pode servir como base para orientar investigação aplicada às questões de inovação em turismo a partir da visão regional, ao tempo que pretende contribuir para a compreensão dos fatores determinantes para a competitividade de destinos turísticos, baseada nos imperativos da economia da experiência.

Palavras-chave | Turismo, Inovação, Destinos, Competências Regionais.

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1. Competitive Context for Tourism

At the turn of the century, the competitive imperative for all productive sectors was summarized in a book by Trout (2000), which prophesied in its title: differentiate or die. Today, after more than a decade of transition and transformation in the competitive context, it seems that we can update the prophecy, or at least the first sentence to highlight the latest imperative dichotomy: innovate or die.

Search for innovation has been a major challenge for all economic sectors (Hall and Williams, 2008), among them, and surely one of the most important, is tourism with all its power and strength, especially with regard to changes in dynamics, territorial and local flows. Pine and Gilmore (1999) defined the unstable atmosphere characteristic of transformation as *the experience economy*, where products, services and other innovations tend to be adapted to demands of the heart and no longer to those of rational thought. According to the authors, any industry or enterprise that is part of the experience economy is committed to five principles: thematization, harmonization, satisfaction, materialization and realization (Pine and Gilmore, 1999).

A new world emerges with new people and new relationships. Improvement and enhancement of services are characteristic of a contemporary contradictory society, since it consumes en masse, while simultaneously valuing private identity, which remains connected with the universe, but wants to live unique experiences.

One of the central issues in the new global competitive context is redirecting the focus to symbolic systems, both in the aesthetic field and in its forms of manifestations, experimentations, a mixture of reality and fantasy that defines and characterizes a new consumption tendency that exerts a strong influence on the composition of products and services in this third millennium.

This new context is summarized in Kim and Mauborgne's blue ocean strategy (2005: 10), which uses strategic movement to study the basic causes of

high performance in sectors or organizations. These movements consist of a "set of managerial decisions and actions that result in important products or services capable of creating new markets" (Kim and Mauborgne, 2005: 10). Based on an ample and important study about the causes of high performance in companies and sectors, the authors concluded that neither companies nor business sectors are adequate analysis units to explain the creation of blue oceans and preservation of high value in the competitive context.

Interpreting the current context as an important strategic move for the development of tourist destinations promotes an environment of opportunity for unprecedented innovation and variety of tourism products. However, this same context imposes new constraints and demands performance profiles more adjusted to a new world order, with characteristics and attributes of direct impact on the structure and style of management, processes and actions, as well as on standards of competitive destinations (Ritchie and Crouch, 2003).

According to Pine and Gilmore (1999), intellectual precursors of this new competitiveness context, the historical and conceptual evolution that results in experience being the determining factor in deciding and evaluating competitive positioning can be defined in the progression of economic value in the experience economy. This is an evolutionary model whose determining variables are increased differentiation, relevance and value, starting from the traditional division of market activities into commodities, consumer goods and services, adding experience as a variable characterized by the ability to differentiate and the degree of relevance to the consumer.

With Kim and Mauborgne's approach (2005), two possibilities emerge in a particular competitive context. The option to sail in red oceans, which represents all existing sectors, is the well-known market space. The option to tame blue oceans means to explore potential, often non-existent sectors. This is the unknown market space. In their research, the authors show the direct relationship between historic

moments shaping strategic movements that create blue oceans and the emergence of new trajectories and ideas that lead to new products and markets. Their studies conclude that there is no company or sector that is competitive if it is not in harmony with its context.

Personalization is a strong tendency that can be observed in tourism (WTO, 2000). Tourist consumption is increasingly fragmented, pressured by the diversified supply of destinations, in which certain traditional products, even those of mass consumption such as the sun and beach, have been losing ground to other products or else demanding diversified complementary attractions that integrate the context of the experience.

Everything related to fun and dreams will be successful in the future and tourism is at the centre of this movement. It is essential that locally developed tourist services be offered, taking advantage of cultural aspects that could compliment other innovative products. Thus, for small businesses located in tourist areas that are strongly influenced by local activities, the competitive advantage may lie in strengthening culture identity and preserving and optimizing natural resources.

Innovation in tourism gains strength when competition and competitiveness problems are highlighted in the flows of globalization. These two factors underscore the opportunities of new technologies, and especially the advantage of unique offers and genuine experiences, even when based on traditional practices and destinations, from the reinvention and renewal of the attractions (Hall and Williams, 2008).

Horner and Swarbrooke (2002), following this train of thought, argue that knowledge of tourism experience, based on the recognition of perceptions and emotions experienced during a trip, emerges as a central element of tourism destination branding strategy, as well as the development and communication of tourism products.

The experience economy emerges in an environment of multiple opportunities to generate competi-

tive advantages in tourism, favouring the supply of products and services adapted to market changes and the development of innovative service/product models. These principles consider the unique nature and culture of localities as inspiring sources of consumption. In other words, a reference to the intangible, which provides unique and memorable experiences and feelings that touch the soul, a sense of dreams fulfilled. This is the context for tourism that must serve as a reference for managers and planners to guide strategic decisions regarding destinations.

2. Innovate or die, engage or surrender

But just what is innovation, and what does it mean from the perspective of tourism? If attempts to answer the question are supported by initial experiments on the subject, which become relevant as competitive pressures grow in the global economy and parts of the value chain or entire value chains are being shifted to economies with more attractive productivity conditions in terms of capital. Even the service sector, traditionally considered non-tradable, is adapting to transformations in the international economy and changes in globalized economic activities, aligning itself with a new order (OECD, 2006).

Innovation has been the subject of different studies and is currently favoured by extensive research and publications about its principles, processes and implications. Notably, the predominant approach of innovation studies is organizational or business, which is understood as the ultimate unit of effective innovation. In other words, when the idea takes shape in a product or service.

Schumpeter's definition remains the most referenced and used when attempting to understand the concept of innovation (Sarkar, 2010). According to the author, innovation involves two key elements: creativity and new ideas. However, he emphasizes the need to differentiate between invention and any other term that can refer to something new, since

the term innovation is closely linked to verbs implement, engage, enable and basically succeed. In other words, innovation is a viable, feasible and profitable invention.

Innovation research in the manufacturing sector enabled the foundation for the first trials on innovation in the service sector, while still in a stage of forming a referential field. Identification, classification and ownership of innovations and changes in the service sector are currently among the topics of most interest to scholars and strategists. Reflecting this transformation, the service sector has gradually become recognized for its considerable innovative potential (Hjalager, 2010).

The emerging service economy, driven largely by the development and expansion of software at the end of the last millennium, changed the concept of innovation, which now includes intangible attributes in its definition. Indeed, these attributes and elements are now seen as having greater transformation and impact potential than tangible components such as goods, products and services.

Innovation studies in tourism, classified as hospitality and travel-related services, are even more recent. In terms of the margin of advances in academic research, tourism has demonstrated a significant capacity for innovation and creativity (Hjalager, 2010), closely related concepts in current literature (Sarkar, 2010; Hall and Williams, 2008). Over the past two decades there has been a growing focus on innovation in the tourism sector, although studies reveal systematic limitations, partial treatment and scant empirical evidence of results, compared with the capacity for innovative activities and their impact and implications for destinations and national economies (Hjalager, 2010).

For Hjalager (2010), innovation in tourism is classified as:

- Innovation of products or services: refers to changes observed directly by the client, and considered as new, both in the sense of never before seen, or new to a particular company or destination.
- Process innovation: usually refers to backstage initiatives that aim at efficiency, productivity and flow. Investments in technology are the anchor of the innovative process, sometimes in combination with regenerated layouts for manual labour operations.
- Managerial innovation: new ways of organizing internal collaboration, guiding and empowering people, building careers and compensating work with pay and benefits, can also be designed to improve job satisfaction and promote internal knowledge and competence.
- Innovation in management: changes in the way the organization's overall communication with customers is carried out, and how the relationships between service provider and client are built and maintained.
- Institutional innovation: formation of new or a combination of skills already established within and between organizations/companies for interagency collaboration, implemented by means of bilateral agreements for the formation of alliances and networks.

New initiatives and proposals have been formulated in an attempt to understand innovation for the tourism and hospitality sector, a sector consisting primarily of services and distinctive and unique characteristics (Sipe and Testa, 2009). However, due to insufficient dedication of innovation studies in this segment, theoretical knowledge and inconsistency on the subject does not allow inferences about what innovation is and how it can be implemented. The authors propose a typology of innovation in tourism from the perspective of results or effectiveness (innovation output), as seen in Table 1.

A range of concepts and categories can be observed; however, it is important to note that one does not exclude the other, that is, they can be complementary (OCDE, 2006). The common axis lies in the understanding that innovation creates a gap in the market that can be exploited as a competitive advantage. The degree of innovation exclusivity and

Table 1 | Typology of innovation in tourism and hospitality

Type of Innovation	Service	Management and Process	Product
Degree of innovation Implementation Unit Examples	Not yet on the market Segment Space Tourism	Suitability for competitive imperatives Sector Cooperation networks; Eco-efficiency	Unique offer within a sector Organization Ice Hotel

Source: adapted from Sipe and Testa, 2009.

advantage that can be sustained will determine the size of the gap.

This logic applied in the context of experience has important implications for tourism planning, since positioning is crucial to guiding the composition of a destination offer. Equally important is the attention given to the motivation factor for defining demand segments. Innovative and specialized tourist destinations can attract intentional demand and distinguish their products.

3. Tourism Innovation Approach for Regions and Destinations

From a network perspective and considering the particularity of tourism and the importance of its supply chain composition, focus is placed here on a macro approach to innovation. If organizational innovation is generally related to new products, improving existing products, technology and management processes at the macroeconomic level, then innovation is closely linked with economic growth and individual well being (Sarkar, 2010).

Thus, this approach deals with the importance of innovation for economic competitiveness, in this case with particular interest in tourism. The combination of arguments that propose innovation analysis in tourism from a regional perspective relies on intrinsic factors that distinguish it from other productive sectors, such as the diversity of sub-sectors that form its supply chain and the mosaic of experiences that must come together for a unique experience.

Reinforcing the importance of innovation as a key challenge for today’s competitive countries and regions, the EU has developed a methodology called Union Innovation Scoreboard 2011 (IUS), which serves as a method of monitoring the competitive performance in terms of innovation in the countries and tool evaluation of the implementation of Europe 2020 innovation Union, European development plan focused on innovation.

The result of ranking enables benchmarking innovation performance of Member States of the EU27 and the strengths and weaknesses of their systems for research and innovation. The overall index is composed of 25 indicators that capture the performance of research systems and national innovation, considered in its totality (UNU-MERIT, 2011). Essentially, the indicators reflect the conditions that foster basic and fundamental that countries are more or less innovative, such as those related to education, investment in research, the dynamics of business, entrepreneurship and regulatory factors. These indicators work for a reference to diagnose the same conditions for innovation in tourism, however, from the adaptation to scale regional.

Tourism plays an important role in the development of regional innovation systems (RISs). According to Hall and William (2008), from a perspective of regional innovation, tourism development in the context of this strategy is a facilitator of human mobility with RIS support networks being an important contributor, as part of a series of interrelated sectors. In most places, tourism can contribute more effectively to regional innovation and long-term development by associating with other sectors. In fact, as

Doel and Hubbard (2002: 353) argue, policymakers need to “replace their local focus, and concentrate on connectivity, performance and flow”.

To this end, Hall and William (2008) systematize what they consider a typology of RIS from intrinsic determinants of the ability to generate innovations in specific geographical areas. Types of RIS can be established from an assessment of technological trajectories for regions and their productive diversity and ability to innovate:

- Genuine Innovators: These are regions where new combinations actually take place and best practices occur. All stages of innovation cycles may exist within them, and its main actors are able to explore the innovations developed, as well as new ones. These regions also maintain competitive and collaborative relationships with other RIS leaders.
- Adapters: These regions are involved in incremental innovations, which potentially lead to higher quality. An RIS on these sites are able to adopt innovations from external sources at the beginning of the cycle and improve them.
- Adopters: These are RISs in which innovations spread relatively slowly. Learning is accomplished through imitation strategies that produce products developed without substantial improvements in original innovation, but that still have a market, as they are part of a routine production system. For services such as tourism, a reproductive approach may be innovative in regional markets, but cannot sustain competitive advantage on a larger geographical scale.

According to the authors, the notion that territorial agglomeration provides the ideal context for an innovation-based economy, promoting local learning and endogenous regional economic development, has become well established in the literature dealing with aspects of innovation. From this perspective, innovation is an inherently territorial and localized phenomenon, highly dependent on resources that are tied to specific localities and whose reproduction is impossible elsewhere (Longhi, 2005).

Little attention has been devoted to development strategies as differentiators from one place to another, standardizing “checklists” to become “creative cities” or “competitive”, transferring standards from one city to another, based therefore, on imitation (Lopez, 2000).

Hall and William (2008) extended the original typology, identifying possible strategies for each RIS category. Genuine innovator regions adhere to high-road strategies, mainly based on learning, connectivity and communication with high levels of convenience for visitors and residents, and on diversity appreciation. On the other hand, follower regions (adopters) are based on low-road strategies, focusing on “traditional” location factors, such as land, labour, capital, infrastructure and local advantages in relation to markets or key production elements, as well as direct subsidies from the state to maintain businesses. Intangibles such as intellectual capital and institutional capacity are secondary.

Low-road strategies are generally considered tied to a property-growth vision concerned with local product “packaging” and generating events to ensure media attention. Such strategies may lead to duplication of various local characteristics that cause market homogeneity, such as shopping malls and museums. This process was described by Harvey (*apud* Hall and Williams, 2008: 165) as part of an “urban entrepreneurialism” in which “many of the innovations and investments intended to make certain locations more attractive as shopping and cultural centres were quickly imitated in other places thus making competitive advantage within a system of cities short-lived”. Furthermore, they reflect choices of those responsible for making decisions and their advisers, who use so-called “off-the-shelf” (without their own practices) or “best practice” (best practices provided by others) as a cluster of innovation.

General characteristics that shape and differentiate one region from another are important in this classification, enhancing intangible components related to social capital and development paradigm

as main inducers and supporters of a situation more favourable to innovative initiatives and the creation of inimitable competitive advantages. Thus, regional and local levels are important areas for innovation and this is particularly relevant for tourism, since it is based on regional attributes and strategies that enhance originality as a factor capable of sustaining a competitive differential.

4. Framework for analysis of innovation in the experience context

An organized offer in tourism presupposes the existence of a product or tourist attraction that, in a given territory, encourages a dynamic integration between the various activities that comprise the sector. That is, the product or attraction works as a generator of a network of services supported by the development of local and regional infrastructure, whose dynamics can promote the growth of information, production and consumption flows, which, if properly managed, allow tourism to act as an economic vector and, when negotiated and agreed upon, kept within parameters of sustainability (Mazaro, 2010).

In this sense, the composition of networks and their interrelationships are central to this approach. A network system is seen as being composed of actors and interrelated activities in a succession of management decisions and production, processing, marketing and consumption operations in a given environment. The network approach allows identification, within a specific process or production activities, of gaps and points of added value in the final offer, in this case a tourist destination. In addition, it distinguishes critical factors that hinder product competitiveness, as well as those that streamline, to promote and establish consensus strategies among key actors.

In a prospective view, the WTO (2000) suggests that the focus of networks or supply chain is relevant

in the globalized world economy, in which issues such as competitiveness, technological innovation and production systems are discussed in a systematic way in all spheres of the economy, from productive activities until the service sector, which includes tourism. A dynamic and complex economic activity such as tourism finds in the systematic network approach an important networking tool for the analysis and formulation of competitive strategies.

In addition to the operation of each activity involved in the performance dynamics of tourism, the formation of networks should be guided by a definition of global supply, which involves keeping a balanced distribution of products and activities throughout the consumption process, or living the experience, so that all needs are met. This supply principle is crucial in forming networks, which must be driven by the convergence and association of products and services based on high-level cooperation among their peers.

Tourism actors now seem to understand that cooperation and innovation are key determinants for survival and a competitive and dynamic environment. Different political mechanisms whose goal is to encourage all involved to participate in regional and local governance in a cooperative and proactive format are identified. This means that a policy of innovation in tourism should promote coherence and synergy.

The OECD (2003), taking a position on innovation and growth in the tourism sector, highlighted that the challenge for the industry is to offer new products and services that improve overall profitability and develop further attractiveness and competitiveness of destinations and organizations, especially in respect to better responses to changes in tourism demand:

"[...] a successful and promising instrument for innovation in tourism can be achieved through cooperation, alliances and/or networks in areas such as technology, marketing, distribution and sharing of human resources. [...] Networks/clusters can play an important role in terms of conditions for innovation of

operators (i.e. lower costs of experimentation, greater visibility and better responses to demand changes).” (OECD, 2003: 4).

Recent studies deal with innovation from networks of tourism organizations. This suggests that attributes such as interdependence and complementarity turn out to be fundamental, perhaps crucial to tourism innovations. Cooperation is seen as a practical relevance in improving tourism competitiveness due to the immateriality of tourist services and the chain of interrelationships that make a tourist product, which go beyond the action limits of its agents alone (WTO, 2000).

The destination, when viewed from the network perspective, represents by itself a repository of knowledge and expertise, and parts of this knowledge are unique and inimitable and crucial to the development of products and services (Weidenfeld *et al.*, 2010). The basic assumption of these tests is that the ability to change and adapt is greater at the poles and sector-based clusters than in fragmented or scattered structures, which may serve to better analyze the tourist potential of communities and localities. Other studies also show that destinations contain decisive transverse knowledge that is of great importance to innovation.

Innovations that have a segment or sector as a whole as an implementation unit is those that best match the network or clusters perspective in tourism, since they obey the collective and cooperative

logic and stress the need for complementarity in the composition of tourism destinations from a supra-organizational view that goes far beyond the simple summation of products.

Thus, the proposal of this paper is to offer an interpretation of what may represent a combination of competitive imperatives indicated in the experience context with the structuring of the regional supply chain and that form a complete tourist destination offer. To this end, it proposes a structure that serves to analyze this combination: on one hand, the dimensions of the complete tourist destination offer and, on the other the principles of complementarity, integration, differentiation and originality, which are presented as indicators of competitiveness in the context of experience.

Table 2 summarizes this combination and allows the interpretation of regional competencies in the face of these imperatives. To further the aims of this research it provides an analysis and identification of innovation opportunities in tourism from the viewpoint of regional development and entrepreneurship.

The dimensions represent different segments of the supply chain that makes up the complete set of tourism products and should have proposed experience as the common axis, represented by the attributes of competitiveness suggested by the prevailing strategic movement. The intersection between dimensions and attributes allows a critical analysis of the tourism product potential and gaps,

Table 2 | Framework for supply chain analysis of local tourism in the experience context

Dimension	Attributes			
	Integration	Complementarity	Differentiation	Originality
Attractions	Main motivation	Secondary motivations	Positioning	Experience
Accommodation	Spatial distribution	Distribution categories	Translation of concept	Styling
Gastronomy	Spatial capability	Gastronomic diversity	Influences and traditions	Combination of styles
Entertainment	Consistency with main motivation	A variety of comparable options	Embodiment of the positioning	Thematization
Mobility	Access to attractions	Diversity of the means of mobility	Combination of alternative means	Unique or typical means

Source: own construction.

as well as mapping of tourism opportunities to be explored in each business segment.

The dimensions assume a logical sequence of tourism analysis in the destination or region, beginning with attractions as benchmarks for the design of other categories of analysis, because this attribute is seen as the starting point for goals to be set for the development of tourism at the destination and that will guide all other strategic decisions and specific deployment actions.

From sizing the attractions and their competitive importance, it is possible to qualitatively evaluate accommodation and meal dimensions, which although considered sub-sectors of tourism, may represent important sources of differentiation and originality when guided by principles of experience. The entertainment industry, although currently accounting for the smallest share of spending on tourism, represents the largest area of innovation and differentiation of tourist destinations in the context of experience and perhaps the most important indicator to increase competitive sustainability at the level of spending and length of stay in tourist destinations.

As for the qualification attributes of the product, the sector-based approach advocated here is committed in its essence to the principle of complementarity and integration. Reinforcing this view, tourism policies provide orientation guidelines for regional integration, whereas regional roadmaps suggest a greater diversity of attractions and therefore greater competitive advantage over isolated destinations. Factors related to differentiation and originality are spaces for unlimited opportunity. They are unexplored blue oceans through which original and exclusive products can be offered that effectively sustain innovation-based competitive advantages.

5. Final Considerations

The ability to integrate service providers among typical tourism activities and develop activities is de-

terminant and fundamental factors for the composition of competitive and sustainable tourism products. However, the composition of networks driven by the notion of a unique attraction in the eyes of tourists is conditioned primarily by the strategic thinking of managers and decision makers in understanding and accepting this premise as a competitive imperative, as well as by the ability of perception, interpretation and conversion of signals in environment decisions for implementation in accordance with such determinants.

Therefore, competitive patterns that determine the future scenario of destinations may lie in the ability of managers to interpret the macro-environment and extract from it decision-making guidelines. This means that the ability to create innovative experiences in a sector-based approach is conditioned by collective competence, much more than individual effort, to propose productive arrangements that are also innovative.

At the same time, this ability is conditioned by the development of a reference model for the regions, since, in a context of experience, it can only be successful when it is indeed the central factor for tourism planning. Still, it will be inevitably pending on local and regional conditions of development that are beyond the scope of tourism.

Although they are considered part of the development of innovative strategies, the infrastructures of learning, knowledge and interaction that sustain a high position in RIS language are difficult to plan, manage and measure. This, therefore, raises political problems for decision makers, where growth is often driven to demonstrate competitive success in relation to electoral cycles or governments.

One can say that only a very small number of regions can attain the precision levels needed to take advantage of competitive advantages offered by the experience economy. A large number of elements, especially those that are not omnipresent, cannot be imposed, even with the best possible plan. Usually they are reflections of strategic movements outside the region or community and new attitudes and values may take a long time to be incorporated.

The application of the framework to conduct research in tourism destinations is expected to serve academic interests in the generation of knowledge about the topic, as well as to generate end results through fieldwork. These will show opportunities of innovation for the sector, guide investments and subsidize information for the development of products and services that correspond to the determinants of competitiveness in tourism, grounded in the imperatives of the experience economy.

As a final thought, it can be highlighted that the studies on innovation in tourism and, especially, the use of innovative approaches and methodologies need to move as fast as the developments and changes to the macro-environment. These will impact on all sectors, offering pertinent answers to the issues that arise from this new competitive context to tourism destinations. Therefore, the efforts undertaken in this paper to the formation of a typology of opportunities of innovation from the perspective of the supply chain, on its own, already represent a contribution to its understanding. It identifies and systematizes the elements and factors that can characterize different competitive contexts and guide specific applications in the realities of tourism destinations.

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