



EUROPE

Factors influencing domestic tourism in the UK and abroad and the role of publicly funded domestic tourism marketing

A rapid evidence assessment

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Preface

This report has been produced for the UK Department of Digital, Culture, Media & Sport (DCMS). It presents findings of a rapid evidence assessment review of peer-reviewed papers, reports and other ‘grey’ literature on the factors that influence the decision to take domestic holidays, and the role of publicly funded domestic tourism marketing in that decision-making process. A secondary aim was to identify research gaps, where they exist. No additional empirical analysis has been undertaken for this work.

While the primary audience for the document is DCMS, it may be of wider interest to agencies who are interested in domestic tourism and the role of publicly funded domestic marketing campaigns.

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Executive Summary

Domestic tourism delivers economic benefits to the broader UK economy, as well as to stakeholders within a specific destination. To give an indication of the size of these benefits, in 2018 British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19.3bn, with an average trip length of three nights.¹ In the same year, overseas visitors made 37.9 million trips to the UK and spent £22.9bn.² The British Tourist Authority, trading as VisitBritain and VisitEngland, receives around £19.6m (VisitBritain) and £6.9m (VisitEngland) in grant-in-aid³ each year to cover both their core costs and their marketing activity. They also receive around £22m a year from the GREAT campaign for marketing activity, and between 2016 and 2019 received £40m from the Discover England Fund.⁴ At present, a small proportion of this funding is spent on promoting domestic tourism – the majority is spent on promoting the UK overseas to potential inbound visitors. Thus the Department for Digital, Culture, Media & Sport (DCMS) commissioned RAND Europe to conduct this study to provide evidence on factors that influence people’s decisions to take domestic holidays, with a special focus on the impact of publicly funded domestic tourism marketing.

A detailed and rigorous research approach was employed

A Rapid Evidence Assessment (REA) was undertaken to provide a comprehensive, systematic and critical assessment of the scope and quality of available evidence on factors influencing domestic tourism and the role of publicly funded domestic tourism marketing. A two-pronged approach was employed, in which systematic searches were undertaken across a number of databases, and known experts and agencies were contacted to help identify relevant literature. This approach meant that potential literature sources were comprehensively searched, giving us confidence that the most relevant literature – including grey literature – was identified and included in the literature review.⁵ A search protocol was developed that specified the search strategies and databases to be used in the systematic searches, as well as inclusion and exclusion criteria for identifying and selecting relevant literature.⁶ The systematic searches were implemented by a trained librarian and were supplemented by targeted online searches.

¹ VisitBritain, 2020.

² VisitBritain, 2018.

³ Grant-in-aid: a sum of money provided to an organisation, by government, to be applied in general support for the objectives of that organisation.

⁴ British Tourist Authority Annual Report and Accounts – year ending 31 March 2018.

⁵ Grey literature is broadly defined as unpublished or non-peer-reviewed studies.

⁶ The search protocol is contained in Annex A.

In total, over 2,700 publications containing evidence factors influencing domestic tourism and the potential impact of publicly funded domestic tourism campaigns were identified from databases, experts and direct searches. These were screened in a systematic way using specified inclusion criteria to produce a longlist of 45 potential studies for review. The longlist was screened a second time by senior project team members and subject experts to determine the list of final papers for inclusion in the review. This list was reviewed and approved by DCMS and VisitEngland. A final shortlist of 23 papers was reviewed, including 13 papers on factors influencing domestic tourism decisions and ten papers on the impact of publicly funded campaigns. Two papers were dropped at the review stage as they were not found to be relevant, once the full text had been reviewed. Evidence was collated in Excel extraction spreadsheets to ensure consistency in data collection across reviews. An internal workshop was held with team members and academic experts to discuss the evidence, synthesise key findings and identify evidence gaps.

Summary of the research findings on factors influencing domestic tourism

The REA has identified a wide range of the factors influencing domestic tourism:

- Economic factors (which include GDP, income, relative price and exchange rate) are the most prominently researched factors linked with domestic tourism. There is mixed evidence on the impact of economic factors on domestic tourism, which appears to be explained by whether international travel is accounted for in the analysis. High domestic prices are found to deter domestic tourism.
- Activities and specific destination-related attributes are found to have an important impact on both where people choose to travel, and the level of domestic tourism.
- Demographic characteristics have been shown to impact the propensity for undertaking domestic holidays. Lower education levels and the presence of children have been shown to be positively associated with domestic tourism. There is little evidence on other demographic factors such as marital status, age and employment status on domestic tourism levels.
- The evidence on environmental attitudes and domestic tourism is mixed. Some evidence shows that those with more environmentally friendly attitudes have a more positive attitude towards domestic holidays. However, evidence also suggests that demand for international holidays still remains high amongst this group.
- Weather, both in the country of origin and in destination countries, has been shown to influence the decision to have a domestic holiday or travel abroad.
- Lastly, better transport infrastructure (good transport connectivity) and improved accessibility are positively associated with domestic tourism.

The REA has also identified some possible gaps in the current research:

- The published evidence is rather dated and the quality of some evidence is limited by small sample sizes. Moreover, the influence of recent geopolitical trends like Brexit, security issues like pandemics, and new technology and services – such as the influence of the Internet, social media, Airbnb and TripAdvisor, etc. – have not been picked up in the academic literature.

- Much of the published literature is not based on evidence from the UK, which may create transferability issues. We focused on published research undertaken in OECD countries to minimise transferability issues, but issues still remain – for example whether factors influencing domestic tourism in a large country like Australia translate equally to the UK context.
- Most of the reviewed research contains limited market segmentation in terms of types of tourism and types of travellers.
- More research is required to quantify the relationship between domestic and international trips. This would also help clarify the impact of income on domestic tourism demand.
- Many other relevant factors – such as tourism events, transport access and demographics – are either neglected completely or touched upon in too little detail. Ultimately, a wider range of factors needs to be covered in more detail.

Summary of the research findings on the impact of publicly funded campaigns

We found very limited evidence concerning the role and impact of publicly funded domestic tourism campaigns on decision making. Below we summarise the key findings and evidence gaps:

- The evidence on the influence of publicly funded destination marketing on domestic tourism is very limited. This evidence gap is further accentuated when narrowing the scope of study to the UK context. Of the five studies that directly addressed domestic tourism marketing, only three were focused on the UK specifically.
- A significant problem facing research in this area is the challenge of measuring the impact of destination marketing activities. Traditional approaches for measurement, including visitor metrics and conversion studies, do not fully account for the impact of exogenous variables – like weather, family characteristics, etc. – on travel decisions.⁷ They also fail to account for the increasing role of the Internet and online social media on travel choices.
- There is very little existing evidence concerning the impact of destination marketing (domestic or otherwise) on moving trips to outside the peak season, moving holiday trips to different regions or encouraging people to extend the duration of trips.

In addition, the REA provides a number of insights that may inform the future strategies and approaches of publicly funded campaigns:

- Destination marketing activities can impact traveller destination choice. Conversion studies conducted in the past suggest that higher campaign investment and generic (rather than niche) marketing are positively correlated with return on investment. Destination marketing may have less impact on destination choices than on *other* decisions related to travel, for example decisions to visit featured attractions, restaurants and featured events. There is some evidence that

⁷ Conversion studies use surveys to quantify the number of people who request marketing materials about a destination and then who subsequently go on to visit that destination. In most instances, they produce a conversion rate.

advertisements influencing travellers to visit featured attractions, restaurants and hotels have the most significant positive impact on visitor spending.

- Travellers adopt flexible attitudes towards deals and promotions depending on the holiday context, the stage in the life cycle and the destination type. Positive attitudes towards deals are associated with international trips and domestic short breaks. Some travellers feel that deals for domestic trips offer limited value for money. ‘Brand salience’ represents a more significant factor than ‘brand attitude’ in influencing domestic travellers’ intention to visit a destination.⁸
- Many Destination Management Organisations (DMOs), including domestic and international organisations, are not using social media to effectively engage with potential customers.
- Visual content and moderate post-length have a positive impact on end-user engagement with DMO social media profiles. High post-frequency, and posts early in the day, have a negative impact.
- A number of key branding concepts (which include ‘brand identity’, including ‘brand personality’, ‘brand image’ and ‘brand positioning’) derived from the broader marketing literature may be applicable in the context of destination marketing, including in the context of domestic tourism. Studies find that UK DMOs do seek to create unique ‘destination brand personalities’; they have also highlighted gaps between these destination brand personalities and the image of destinations held by tourists.⁹
- ‘Sense of place’ toolkits can play an important role in effective destination marketing, including in the cultivation of cohesive destination brand personalities.¹⁰

⁸ The concepts of ‘brand salience’ and ‘brand attitude’ are drawn from the broader marketing literature. ‘Brand salience’ refers to the capacity of the brand to be retrieved and remembered by the consumer. ‘Brand attitude’, by contrast, refers to a consumer’s more specific attitudes and feelings towards the brand.

⁹ A subset of ‘brand identity’, ‘brand personality’ is conceived as a set of human characteristics associated with a brand. ‘Destination brand personality’ refers to the attempt to apply this concept to destination marketing.

¹⁰ Typically developed through workshops with local stakeholders in a destination, ‘sense of place’ toolkits aim to foster a common understanding of the key assets of the destination that constitute its unique appeal.

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Abbreviations

| | |
|-------|---|
| CBBE | Consumer based brand equity |
| DCMS | Department for Digital, Culture, Media & Sport (DCMS) |
| DMO | Destination Management Organisation |
| GB | Great Britain |
| GBTS | Great Britain Tourism Survey |
| LEP | Local Enterprise Partnership |
| NTOs | National Tourism Organisations |
| NUTS | European Nomenclature of Territorial Units for Statistics |
| RDA | Regional Development Agencies |
| REA | Rapid evidence assessment |
| RTB | Regional Tourist Boards |
| SAR | Spatial autoregressive |
| SEM | Structural equation modelling |
| TDE | Tourism Direct Employment |
| TDGVA | Tourism Direct Gross Value Added |
| TSA | Tourism Satellite Account |
| UK | United Kingdom |
| VFR | Visiting friends and relatives |

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1. Introduction

This section presents:

- The background to the research included in the report;
- The research objectives and methodologies;
- The structure of the rest of the report.

1.1. Background and context

In 2018, British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19.3bn, with an average trip length of three nights.¹¹ British residents also took 1,431 million day trips, with a total expenditure of £53bn.¹² According to the UK Tourism Satellite Account,¹³ domestic tourism expenditure by UK residents was £119.4bn in 2017, an increase of £2.8bn from 2016 that was partly driven by a £0.9bn rise in spending by same-day visitors. Inbound visitors spent £28.2bn, an increase of 8.9 per cent (£2.3 billion) from 2016 that was largely driven by foreign overnight tourists. In the same year, tourism direct employment (TDE) was 1.6 million, including 1.2 million full-time equivalent employees working in 233,080 tourism-related enterprises. Tourism direct gross value added (TDGVA) was £59.7bn. It is evident that domestic tourism can deliver economic benefits to the broader UK economy, as well as to stakeholders within a specific destination.

The British Tourist Authority, trading as VisitBritain and VisitEngland, receives around £19.6m (VisitBritain) and £6.9m (VisitEngland) in grant-in-aid¹⁴ each year to cover both core costs and marketing activity. The organisations also receive around £22m a year from the GREAT campaign for marketing activity, and between 2016 and 2019 received £40m from the Discover England Fund.¹⁵ At present, a small proportion of this funding is spent on domestic promotion – the majority is spent on promoting the UK overseas to potential inbound visitors.

In the UK, domestic tourism marketing is an activity undertaken for the most part by destination management organisations (DMOs). In most cases, DMOs are private-public-partnerships operated in conjunction with local government bodies, whose principal purpose is to promote their destinations through the coordination of marketing activities. In the UK and beyond, DMOs have a long history

¹¹ VisitBritain, 2020.

¹² VisitBritain, 2019a.

¹³ Office for National Statistics, 2019.

¹⁴ Grant-in-aid: a sum of money provided to an organisation, by government, to be applied in general support for the objectives of that organisation

¹⁵ British Tourist Authority Annual Report and Accounts – year ending 31 March 2018.

running back to at least the 19th century.¹⁶ A key period in the growth of DMOs was the period immediately following the Second World War, reflecting the rise of the package holiday, introduction of jet aircraft and the rise of the holiday brochure (Pike & Page, 2014).

In the UK, the structures surrounding DMOs have been through two major phases of transition in recent decades. The first phase, unfolding between the years 1997 and 2012, saw a shift towards regionalism in the development and implementation of tourism strategy. In 1999, reflecting a broader policy agenda of devolution under New Labour, the UK government created new Regional Development Agencies (RDAs) in England – centrally funded public bodies tasked with furthering local economic development and regeneration. Nine RDAs were established corresponding to England's nine Nomenclature of Territorial Units for Statistics (NUTS) level 1 regions.¹⁷ In those areas where tourism constituted a key potential driver of economic growth, RDAs soon came to play a key role in the planning and implementation of tourism strategies, gradually assuming many of the responsibilities held by the regional tourist boards (RTBs) connected to the English Tourist Board (now VisitEngland).

The increasing role of RDAs in tourism planning had a number of implications, one of which was to bring tourism under the purview of those government departments responsible for RDAs, including the Department for Business, Innovation and Skills and the Department for Culture, Media and Sport (DCMS). Another implication was to alter the operational environment of DMOs. In many parts of the UK, the aim of DMOs became to undertake tourist-related activities beyond the remit of the RDAs, including the promotion of local destination brands and the funding of visitor services, such as tourist information centres (Coles et al., 2014).

A new phase of tourism planning began in 2012, with the decision of the Conservative-led coalition government to disband RDAs. In their place, the Government now began to promote new Local Enterprise Partnerships (LEPs) comprising of representatives from businesses and local authorities. Unlike RDAs, LEPs receive no core central government funding, relying instead on local authority budgets and, where possible, private sector investment.¹⁸ To date, 38 LEPs have been established in England, several of which have overlapping geographical boundaries.¹⁹ The shift from RDAs to LEPs brought its own changes for tourism planning, most notably a significant reduction in the level of central government funding available for tourism-related activities. DMOs, for their part, are encouraged to partner with LEPs with a view to promoting the importance of tourism in local economic growth. LEPs, meanwhile, have been left to decide whether or not tourism constitutes an important part of local economic planning (Coles et al., 2014).

Within the UK and beyond, academics have debated the role of DMOs and the nomenclature used to refer to them. While some refer to 'destination management organisations', thereby implying a broad role for the organisation in a range of planning and management activities within the destination, others suggest that the limited capacity of DMOs to do anything other than market destinations warrants the adapted title

¹⁶ In 1879, for example, the Blackpool Municipal Corporation obtained government permission to levy a local property tax for funding advertising of the town's attractions. Cited in Pike & Page, 2014.

¹⁷ RDAs were created in England only. At the same time, however, similar regional bodies were also introduced by Devolved Administrations in Scotland, Wales and Northern Ireland).

¹⁸ Central government funding was not severed completely. Instead, LEPs have recourse to a Local Growth Fund, which is administered through a process of competitive bidding.

¹⁹ This overlapping is caused by the fact that some LEPs follow existing local government boundaries, while others are organised around more functional economic areas, thereby cutting across local government boundaries. For a map of the 38 LEPs see LEP Network (2020).

of ‘destination marketing organisations’ (Pike & Page, 2014; Rosslee & Chapman, 2015). In the UK context, the aforementioned shift from RDA to LEP-based tourism planning has curtailed both the resources available to DMOs and the status of tourism within policymaking and administration. The result has been that ‘marketing’, rather than broader ‘management’, has become the primary focus of most DMOs (Pike & Page, 2014).

1.2. Research objectives and methodologies

The Department for Digital, Culture, Media and Sport (DCMS) commissioned RAND Europe to conduct this study to provide evidence on factors that influence the decision to take domestic holidays and the role of publicly funded domestic tourism marketing in that decision-making process. More specifically, the study seeks to answer the following research questions:

- What are the factors that influence UK residents’ decisions to take domestic trips within the UK?
- Within that decision-making process, what is the role and impact of publicly funded domestic tourism marketing on:
 - Influencing the time of year that a trip is taken, particularly with regard to encouraging trips outside of the peak summer season?
 - Encouraging trips to specific geographic regions, particularly outside of London?
 - Determining whether to take a trip in the UK; to travel abroad; or not to take a trip at all?
 - Determining whether to make a trip to a specific geographic location, as opposed to the experience/product available at that location?

This report summarises the findings of a Rapid Evidence Assessment (REA). Following the structure of a systematic review, an REA provides a comprehensive, systematic and critical assessment of the scope and quality of available evidence in a given area of interest. REAs balance the benefits of a structured approach to literature review with the need for streamlined, targeted and rapid assessment of the available evidence. In this study, we used an REA to assess the existing evidence on the factors that influence domestic tourism and the role of publicly funded domestic tourism marketing on travellers’ decisions.

1.3. Structure of the report

The report is structured into four sections. In the section that follows this introduction, we set out the methodology, the approaches used to search for relevant literature and the processes through which the most relevant evidence was identified. The middle two sections report on the findings of the REA, focusing first on the factors influencing domestic tourism and second on the role of publicly funded domestic tourism marketing on travellers’ decision making. In both cases, we report on the existing evidence available in these areas and also on evidence gaps. In the final section, we synthesise the findings of the REA and consider their significance in relation to the research questions. In a second phase of the study, we will assess the feasibility of different approaches for addressing the most important gaps identified from the REA. Details of future research methods will be included in a separate note.

2. Methodology

This section presents the rapid evidence assessment (REA) research method used in this study, which includes:

- Systematic literature search approach;
- Identifying additional literature;
- Assembling the literature;
- Review of literature;
- Synthesis of results.

2.1. Introduction

An REA provides a comprehensive, systematic and critical assessment of the scope and quality of available evidence from the literature and allows researchers to confidently identify the volume of evidence on a specific topic and identify the research gaps.

In this study, a two-pronged approach was used to identify potentially relevant literature, ensuring that a broad searching process was undertaken to increase the chances of identifying relevant literature for inclusion in the evidence review. We first conducted a systematic search of databases for literature published in peer-reviewed journals, conference papers and work undertaken by universities and other institutions. While this search methodology can also pick up grey literature (broadly defined as unpublished or non-peer-reviewed studies), particularly reports published by large agencies, it was judged that some evidence might be reported in studies by smaller agencies – including DMOs – and in non-peer-reviewed works. The systematic search was therefore complemented by contacting key individuals in academia and other agencies to identify additional relevant literature, and by searching for grey literature directly.

2.2. Systematic literature search

The methodology of an REA was used for the literature search. As outlined in the Government Social Research Network Guidance,²⁰ REAs follow a similar structure to systematic literature reviews, in that they aim to be replicable and transparent, yet they have the advantage of being less resource intensive. This is

²⁰ The National Archives, 2020.

achieved by formally constraining the types of research to be reviewed, for example, in terms of geographical location, language and publication date.

In the context of this study, an REA was appropriate as it allowed the literature search to focus on the UK, while capturing the most relevant data from other developed countries; a restriction on publication date also helped ensure that the evidence base was sufficiently broad but recent enough to reflect current tourism behaviours and trends.

A search protocol was developed containing search terms that could be used to identify relevant literature and inclusion/exclusion criteria (see Annex A for the detailed search protocol).

The main criteria used for inclusion of published evidence were:

- Language of publication (e.g. English), and geography (EU/OECD countries) to minimise issues of transferability;
- Relevant period of publication (in or after 2005).

Given the different focus of the two research questions (presented in Section 1.2 and reproduced in Box 1), separate search strategies were developed to target potential literature evidence of relevance to each of the questions. The search terms were developed through discussions with the project subject academic experts, DCMS and VisitEngland and in consultation with a trained RAND librarian with expertise in implementing targeted searches in appropriate databases.

Box 1 Research questions for literature review

- 1) What are the factors that influence UK residents' decisions to take domestic trips within the UK?
- 2) Within that decision-making process, what is the role and impact of publicly funded domestic tourism marketing on:
 - Influencing the time of year that a trip is taken, particularly with regard to encouraging trips outside of the peak summer season?
 - Encouraging trips to specific geographic regions, particularly outside of London?
 - Determining whether to take a trip in the UK; to travel abroad; or not to take a trip at all?
 - Determining whether to make a trip to a specific geographic location, as opposed to the experience/product available at that location?

Search strategy 1: Factors that influence domestic tourism decision making

Two sets of search terms were developed to identify literature on factors influencing domestic tourism. The first set of search terms aimed to identify any potential factors using terms such as factor, trend and influence. The second set used more targeted search terms for specific factors that were expected to influence domestic tourism, or where there was an interest in understanding their potential role. These specific factors included:

- Economic factors: including macro-economic factors as well as holiday/travel costs.

- Climate: including both environmental attitudes (to climate change) as a motive for destination choice, and the weather or climate as a key destination attraction.
- Quality of service: such as accommodation and travel, including convenience and travel time.
- Destination attributes: covering location, amenities and type of activities.
- Social and demographic effects: for example age, type of traveller, visit purpose.
- Technology.

In both cases searches were limited to domestic tourism.

Search strategy 2: Role and impact of publicly funded marketing on domestic tourism decision making

The objective of this search strategy was to identify literature that addressed both the way in which publicly funded marketing could influence domestic tourism and how its impact is measured and evaluated. A number of potentially overlapping searches were developed for this purpose in order to generate as many relevant results as possible. The searches were not limited to domestic tourism in this case, and non-relevant studies were excluded at the screening stage.

In addition to the overall role and impact of publicly funded marketing, evidence was also sought on the sub-questions shown in Box 1. Specific search terms were not developed for these. Rather, evidence was recorded in the extraction template (see Section 2.5) at the review stage from the broader evidence base on publicly funded marketing.

The searches were implemented in databases that covered the topic areas of interest and included relevant journals. These were Academic Search Complete, Business Source Complete, Econlit, Scopus and TRID.²¹ Pilot searches were used to ensure that the search strategies identified relevant literature known to the study team.

Full details of the search strategies are presented in Annex A.

2.3. Additional literature from online search and contacts

To supplement the academic database searches, searches were also implemented in Google and Google Scholar to identify literature on publicly funded marketing.²² Seven external academic experts and agencies were also contacted, as well as European National Tourism Organisations (NTOs), to provide recommendations or relevant research conducted by their agencies. Websites for organisations such as the OECD and VisitScotland were also searched for relevant publications. It should be noted that any

²¹ Academic Search Complete and Business Source Complete offer access to a broad range of full-text journals covering social sciences, humanities and business as well as STEM research. Econlit is the American Economic Association's database on worldwide economic literature, including peer-reviewed journal articles, working papers from leading universities, PhD dissertations, books and conference proceedings. Scopus is a large abstract and citation based database of peer-reviewed literature with over 53 million records in the fields of science, technology, medicine, social sciences, arts and humanities. The TRID database integrates the content of two major databases: the Organisation for Economic Co-operation and Development's (OECD's) Joint Transport Research Centre's International Transport Research Documentation (ITRD) Database and the US Transportation Research Board's (TRB's) Transportation Research Information Services (TRIS) Database.

²² These searches are also included in Annex A.

additional literature included in the review is in the public domain and there may be relevant studies that are not publicly available. Further, some literature provided to the project team by the client and contacts was used as background material only and not formally reviewed.

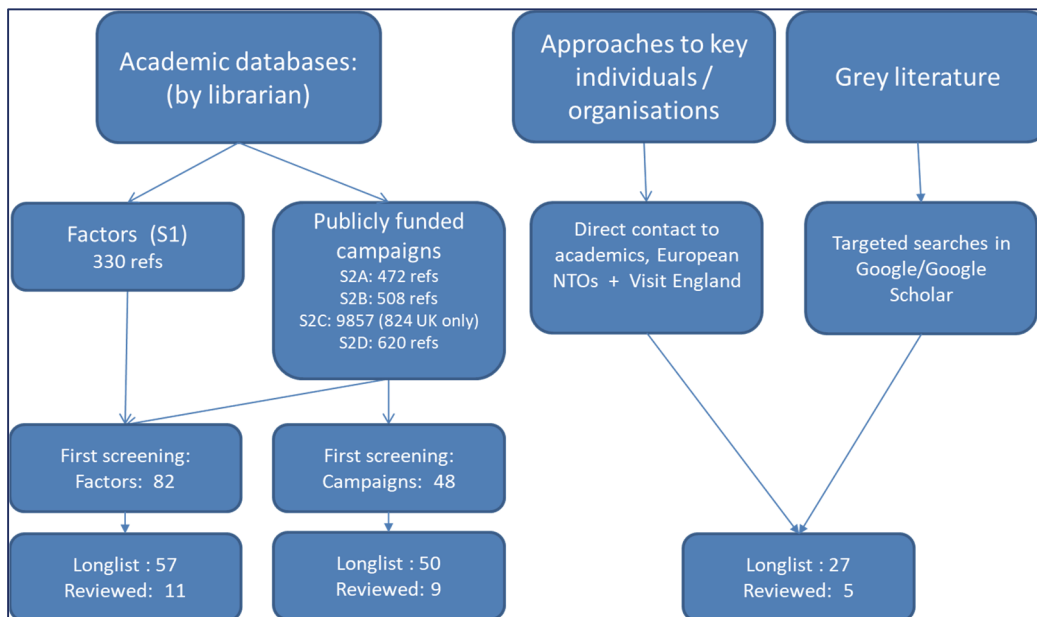
2.4. Assembling the literature

The results of the systematic searches were screened using titles and abstracts of studies identified from the literature search. The first screening phase was conducted within Endnote – specialist reference management software – and was based on the inclusion criteria outlined in Section 2.2 and in Annex A. The screening was undertaken by researchers with subject and literature review expertise to develop a longlist of papers. A similar approach was used to screen additional literature obtained from other sources. In total over 2,700 publications from databases, experts and direct searches were screened.

The resulting longlist of 45 studies was then screened a second time – in conjunction with senior project team members and subject experts – to determine the list of final papers for inclusion in the review, subject to approval by DCMS and VisitEngland.

The shortlist of papers for review consisted of 25 papers. Among these, 13 papers examined the general factors that influence the domestic tourism decision (including the papers identified from the systematic search of academic databases, grey literature and papers identified from approaches to key individuals and organisations), and ten papers examined the impact of publicly funded campaigns (including the papers identified from the systematic search of academic databases, grey literature and papers identified from approaches to key individuals and organisations). Two papers were dropped at the review stage as they were not found to be relevant once the full text had been reviewed. The process of assembling literature is shown in Figure 1.

Figure 1 Summary of results from academic and grey literature searches and contacts



2.5. Review of literature

An Excel extraction spreadsheet was developed for each of the two research questions to systematically collate information from the selected studies. The information recorded from each study reviewed consisted of:

- Study identification information – number, authors, publication date;
- Publication type (journal, report, conference proceedings);
- Study location/country;
- Methodological information (including sample size, statistical measures etc.);
- Key findings;
- Conclusions and any limitations on the quality or reliability of evidence.

Assessment of research quality was mainly based on the methodology used, the quality and type of publication and the age of the evidence.

Abridged versions of the extraction sheets for the factors influencing domestic tourism and the role and impact of publicly funded marketing are included in Appendices B and C respectively.

2.6. Synthesis of results

An internal workshop was held with key team members and academic experts to review the evidence on key factors – including the impact of publicly funded advertising – and cognitive heuristics, such as brand salience and framing, that may influence domestic holiday taking. The workshop considered the methods used in the reviewed studies and discussed their strengths and weaknesses. Transferability of studies conducted outside the UK to the UK context was also considered. The most important evidence gaps were identified and primary research options were discussed to address these gaps.

3. Evidence on key factors influencing domestic tourism

This section presents the evidence on key factors influencing domestic tourism, including:

- Overview of the evidence;
- Evidence on key factors: economic factors, destination, demographics, environmental factors, the weather, and transport and accessibility;
- Conclusion and research gaps identified from the REA.

3.1. Overview of the evidence on key factors influencing domestic tourism

In this chapter, we present and discuss the evidence on the key factors that have been shown to influence domestic tourism. We first present an overview of the papers selected for review, then discuss the evidence on the key factors that have been identified as influencing domestic tourism. The evidence is organised into six groups that summarise the majority of the factors contained in the literature: (i) economic factors; (ii) destination attributes; (iii) demographics; (iv) environmental factors; (v) the weather; and (vi) transport and accessibility.²³ A final section covers the main research gaps that were identified from the REA and as part of an internal workshop.

3.1.1. Overview of papers selected for review

Thirteen papers were reviewed in order to identify evidence on key factors influencing domestic tourism. These included papers from peer-reviewed journals, published reports and working papers. The main characteristics of the papers reviewed are summarised in Table 1 below. Table 2 Summary information from papers reviewed provides more detailed summary information for each of the reviewed papers.

All the reviewed papers covered economic factors, and nearly half of them covered destination attributes and demographic factors. Fewer covered environmental attitudes, weather and transport and accessibility. The papers covered a range of outcome measures, including trips/visits, overnight stays, intentions and attitudes towards making a trip, tourism expenditure and the decision of choosing where to holiday. A range of qualitative and quantitative methodological approaches was used to understand and quantify the impacts of factors on domestic tourism. Finally, the literature covered research in the United Kingdom, Europe, Israel and Australia. The largest proportion of reviewed papers came from the UK.

²³ For the purposes of this analysis, income is included in the economic as opposed to demographic grouping.

Table 1 Summary of main characteristics of the paper reviewed

| Dimension | Number of papers |
|---|------------------|
| Factors covered* | |
| Economics | 13 |
| Destination attributes | 6 |
| Demographics | 6 |
| Environmental attitudes | 4 |
| Weather | 4 |
| Transport and accessibility | 5 |
| Outcome measures | |
| Trips/visits | 5 |
| Overnight stays | 2 |
| Behavioural intentions | 2 |
| Tourism expenditure | 1 |
| Choosing where to holiday | 1 |
| Research methodology | |
| Interviews | 5 |
| Cluster analysis | 3 |
| Regression/logistic regressions (including probit, multinomial) | 5 |
| Structural equation modelling | 2 |
| First differences | 1 |
| Spatial autoregressive model | 1 |
| Extended gravity model | 1 |
| Geography | |
| UK/Isle of Man | 4 |
| Spain | 2 |
| Australia | 2 |
| Norway | 1 |
| Italy | 1 |
| Denmark | 1 |
| Netherlands | 1 |
| Israel | 1 |

* Note that many papers covered more than one type of factor

3.1.2. Outcome measures

The reviewed literature studies use a range of dependent variables as measures of domestic tourism, depending on the specific analytical methods used and the nature of the data available. The most common outcome variable is the number of trips or visits made to a particular destination, which features in six of the thirteen papers. Other quantitative dependent outcome variables used are overnight stays (Yap & Allen 2011, Taylor & Ortiz 2009) and tourism expenditure (Taylor & Ortiz 2009). For three studies – Prebensen & Tkaczynski (2012), Caletrio (2012) and Canavan (2013) – there is no outcome variable as such. Instead, insights are drawn from other aspects of the analysis such as qualitative insights from interviews, or market segmentation based on cluster analysis. Stylidis et al. (2017) and Hyllemose (2012) do not use actual trips as the outcome of interest, instead opting to use attitudes or behavioural intentions towards making a trip in the future. Limitations of this method are that it is potentially hypothetical and may not accurately represent what people then do.

3.1.3. Research methodology

A range of approaches has been used in the literature for understanding the impact of factors on domestic tourism, including both qualitative and quantitative research methods. All 13 studies use data to complement their research, with 11 of the studies conducting statistical analysis on the data.²⁴

- The majority of the findings in Caletrío (2012) and Canavan (2013) come from qualitative insights derived from interviews. Particular trends and themes are picked up and commented on from a more qualitative perspective.
- Bronner and de Hoog (2013) use descriptive statistics to analyse their dataset, which covers the holiday behaviour of Dutch holidaymakers.
- Álvarez-Díaz et al. (2017) estimate both a spatial autoregressive (SAR) model and a gravity model²⁵ to analyse the determinants of tourism flows from one region in Spain to another, using survey data from the Spanish National Statistics Institute. The analysis from the SAR model is the focus of the study since the gravity model was found to suffer from various robustness issues – such as autocorrelation – and failed to incorporate spatial effects.
- Similarly, Massidda and Etzo (2012) use an extended gravity model to estimate tourism flows, incorporating both economic and non-economic explanatory variables.
- Taylor and Ortiz (2009) run two models: a static linear model, and a dynamic model using the Arellano–Bond panel data estimator.²⁶ The dynamic model enables the inclusion of lagged levels of the dependent variable, as well as the differences of the independent variables. Using Met Office UK weather data over multiple time periods, the authors are able to estimate how weather patterns can impact on domestic holiday trips, expenditure and overnight stays in the UK.
- Davison and Ryley (2016) use a logistic regression model to analyse the influence of holiday preferences upon a domestic or international destination choice. The authors also perform frequency analysis on the main determinants of holidays, enabling more detailed analysis.
- Pang (2014) uses a probit model to calculate the additional expected probability of certain factors contributing towards the probability of making a domestic trip. Explanatory variables are then included in the model and the impact on the probability of taking a domestic trip is estimated.

²⁴ A previous report for DCMS on the drivers of tourism demand in the UK (DeHaan et al. 2007) provided evidence on the impact of price, income and climate on domestic tourism. The studies reviewed in the REA provide an updated evidence base on these and other drivers.

²⁵ Autoregressive models are specifications whereby the dependent variable is regressed onto lagged dependent variables. SAR models incorporate spatial interaction effects among regions into autoregressive models. Gravity models are popular model specifications for estimating the regional flow of economic phenomena such as trade, money or in this case, people.

²⁶ In dynamic panel data models, lags of the dependent variable are included as explanatory variables. This violates strict exogeneity conditions, since these terms will be correlated with the error term. The Arellano–Bond method uses the first differences of the exogenous explanatory variables as well as deeper lags to control for this.

- Stylidis et al. (2017) build an integrated path model using structural equation modelling (SEM) in order to understand the relationships between destination image, perceived quality, satisfaction and behavioural intentions amongst domestic tourists. The researchers surveyed visitors to Eilat specifically for the study, asking them about their experience and intention to revisit. SEM is a method that is also utilised by Hyllemose (2012) in order to test the interrelationships amongst various factors influencing domestic holiday preferences. Hyllemose (2012) also uses cluster analysis to segment respondents into three market groups, based on their attitude and intentions towards domestic holidaying.
- Cluster analysis is also the main methodology employed by Prebensen & Tkaczynski (2012), who cluster nature-based tourists in Norway depending on various activity and demographic preferences. Molinillo & Japutra (2017) use cluster analysis to cluster people according to which type of tourist attraction they most like to visit.
- Lastly, Yap & Allen (2011) use 3-stage least squares estimation, which allows the authors to control for heteroscedasticity and contemporaneous residual correlation.²⁷

3.1.4. Geography

The literature covers the United Kingdom, Europe, Israel and Australia.

The three papers for the United Kingdom are representative of the literature identified from the search of published literature, paper recommendations from experts and direct searches for grey literature. There are two papers from Spain: Álvarez-Díaz et al. (2017) examine trips made across the entire population to all regions, whereas Molinillo & Japutra (2017) look specifically at trips made by residents of Andalusia in southern Spain, that the most popular domestic tourism destination in the country. Massidda & Etzo (2012) study domestic tourism in Italy, covering trips made to and from all 20 regions of the country. Bronner & de Hoog (2013) examine behaviour by Dutch tourists. Similarly, Yap & Allen (2011) and Pang (2014) look at domestic travel behaviour from a sample covering all regions of Australia. Prebensen & Tkaczynski (2012) and Hyllemose (2012) look at Norway and Denmark respectively, with the former looking at tourists who engage in some form of nature-based activities, such as skiing, watching the Aurora and hiking. This is only partially transferable to the UK, since the scope of activities is not the same (the chance to ski and seeing the Aurora are far more limited in the UK). Hence, Prebensen & Tkaczynski's study is specific to the climate and topography of Norway so has some limitations in terms of transferability to the UK context. Stylidis et al. (2017) study visitors to the coastal resort of Eilat, the southernmost city in Israel and one of the most well-known tourist destinations in the Middle East. Finally, Canavan (2013) examines residents of the Isle of Man who make domestic trips within the island, a form of tourism known as 'microdomestic tourism'.

²⁷ Heteroscedasticity is a statistical concept whereby the variance of a variable changes as the value of the variable changes. Contemporaneous correlation is when there is correlation between some of the independent variables in a regression and the error term.

Table 2 Summary information from papers reviewed

| Paper | Main factors | Geography | Methods | Data source | Sample size | Outcome | Quality |
|-------------------------------------|---|-------------|---|--|--|---|---|
| Álvarez-Díaz et al. (2017) | Economic, Destination attributes, Transport and accessibility | Spain | Spatial autoregressive model | FAMILITUR household survey | 182 million | Trips | Multiple models estimated before selecting one with best fit. Rich dataset. Incorporates spatial effects. |
| Massidda & Etzo (2012) | Economic, Destination attributes, Environmental attitudes, Transport and accessibility | Italy | Extended gravity model | Italian National Institute of Statistics | 1,520 | Trips | Sophisticated method used and published in a high-quality journal. Rich dataset. |
| Taylor & Ortiz (2009) | Economic, Weather | UK | Linear static model and a dynamic model | Met Office, UK Tourism Survey | 828 (linear static model), 690 (dynamic model) | Trips, Bed nights, Expenditure | Two models estimated. However, the data used is from 1998–2004. |
| Bronner & de Hoog (2013) | Economic | Netherlands | Descriptive statistics | Dutch Continuous Vacation Panel | 3,195 | Information source used to economise on holiday | This paper is largely out of scope as only a small portion of the paper is relevant for domestic tourism. |
| Caletrío (2012) | Economic, Environmental attitudes | UK | Qualitative analysis of survey and interview data | Primary interview and questionnaire data | 580 | Opinions about environmental impact of travel | High-quality journal. Interview data offers rich insight. |
| Davison & Ryley (2016) | Economic, Destination attributes, Demographics, Environmental attitudes, Weather, Transport and accessibility | UK | Logistic regression analysis and descriptive statistics | Primary interview and questionnaire data | 485 | Trips, Destination choice | Wide range of factors tested. Data represents just one region of the UK, so may not be generalisable. |

| | | | | | | | |
|--|---|-------------|---|---|---------|--|--|
| Pang (2014) | Economic, Demographics | Australia | Impact analysis using a probit model | Australian National Visitor Survey, Australian Automotive Fuel Price Index, Australian Real Best Discount Domestic Airfare Index. | 179,791 | Trips | New method mitigates disadvantages of the conventional impact analysis approach. |
| Stylidis et al. (2017) | Destination attributes | Israel | Integrated path model using structural equation modelling | Primary questionnaire data | | | journal. However, focuses on just one city in Israel, so presents issues of external validity. |
| Molinillo & Japutra (2017) | Economic, Destination attributes, Demographics | Spain | Cluster analysis and multinomial logistic regression analysis | Primary survey data | 4,223 | Trips (Visits to attractions) | Focuses on one region in Spain, so many not be generalisable. Looks at cultural attractions only. |
| Prebensen & Tkaczynski (2012) | Economic, Destination attributes, Demographics | Norway | Cluster analysis | Innovation Norway | 1,201 | Market segmentation | Cross-sectional data from 2009, so is outdated. Looks at nature-based tourism only. |
| Yap & Allen (2011) | Economic | Australia | 3 stage least squares | Australian Bureau of Statistics, the Reserve Bank of Australia, Tourism Research Australia. | 36 | Visitor nights | Data covers the period 1999–2007, so is outdated. |
| Canavan (2013) | Economic, Demographics, Weather, Transport and accessibility | Isle of Man | Interviews | Primary data collection | 21 | Qualitative insights from interviews about microdomestic tourism | Small sample size. Lack of quantitative analysis. Solely looks at Isle of Man, so holds generalisability problems. |
| Hyllemose (2012) | Economic, Demographics, Environmental attitudes, Weather, Transport and accessibility | Denmark | Structural equation modelling and cluster analysis | Primary data collection using survey | 283 | Attitudes and behavioural intentions towards domestic holidays | Small sample size and sample is not representative of Danish population. |

A range of different geographies is covered in this REA. Some studies look at domestic tourism across the entire country whilst some look at specific regions within a country, and also offering contrasting perspectives. However, a clear disadvantage of the range of geographies covered by this REA is the external validity issue of comparison to the UK context, since many of the reported geographies are very different to that of the United Kingdom. For example, decisions about domestic tourism in Australia may be quite different to the UK because the geographical distances between places both domestically within Australia, and for travel to international destinations, are far greater than for travel in the UK.

3.2. Evidence synthesis

Below we summarise the evidence across the key areas: economic factors, destination attributes, demographics, environmental attitudes, weather and transport and accessibility.

3.2.1. Economic factors

Economic factors are the most prominently researched group of factors covered in this review, with all 13 papers examining the role of economic factors in choosing whether to make a domestic trip. Broadly, economic factors include measures of gross domestic product, income levels, relative prices and exchange rates.

Álvarez-Díaz et al. (2017) use a spatial autoregressive model to analyse the determinants of tourism flows from one region in Spain to another. They find that GDP per capita, at both the origin and destination region, has a positive and significant impact on tourism flows. The coefficient for the origin region GDP is 1.2, meaning that should a resident's income increase by 1 per cent, the number of trips they make (to other regions) will increase by 1.2 per cent, showing evidence of domestic holidays being a luxury good.²⁸ They also find a relationship between GDP and intra-regional domestic tourist trips, with an even higher magnitude. Similarly, the data shows that higher GDP at the destination region attracts more visitors. Álvarez-Díaz et al. (2017) argue that GDP per capita at destination acts as a proxy for the quality of public services and social institutions, which is attractive to domestic visitors. Likewise, Massidda & Etzo (2012) conclude that people from regions with high GDP per capita are more likely to make domestic trips because in wealthier regions, people have more money to spend on domestic holidays. They find an elasticity of 1.43, which is higher than values found in previous literature, providing further evidence of domestic holidays being a luxury good. Evidence of GDP positively impacting domestic tourism is also found in Pang (2014) and Yap & Allen (2011).

However, the positive impact of GDP on domestic tourism is not a unanimous finding across all the reviewed literature. Taylor & Ortiz (2009) run two models – a static linear model and a dynamic model using the Arellano–Bond panel data estimator – and find mixed results. In the first model, they find a positive relationship between income and tourism expenditure and number of trips, but no significant relationship between income and the number of overnight stays. In the dynamic model, they find the opposite: income is shown to be negatively related to tourism expenditure, bed nights and number of trips.

²⁸ A positive elasticity is observed for normal goods, i.e. demand increases for them as incomes rise. A value of >1 is associated with luxury goods, where demand rises more than proportionally with income.

Further, Molinillo and Japutra (2017) find that individuals on higher incomes are less likely to make trips to popular attractions such as museums and zoos and classical attractions such as the theatre and the opera. The authors note that you might expect the opposite to be true, since classical attractions have traditionally been more attended by those in higher social classes, and attractions are more affordable to those on higher incomes. However, the authors speculate their finding may be because those on lower incomes have more free time, and that these attractions are more accessible and less expensive than they used to be. Hyllemose (2012) uses cluster analysis to segregate people into three groups based on their survey answers regarding domestic holidaying. The author finds a correlation between having a positive attitude towards holidaying domestically and being in the lowest income band of the three groups, with those who much prefer to holiday abroad being more likely to be in the highest income band. Though this relationship is a correlation, not causation, it indicates a relationship between lower incomes and more domestic holidays. Likewise, some studies argue that the financial crisis of 2008, which saw a fall in GDP and incomes, led to an increase in domestic holidays (Bronner & de Hoog, 2013; Caletrío, 2012). Davison & Ryley (2016) find the financial crisis was a statistically significant reason for choosing to holiday in the UK as opposed to abroad, and that domestic locations were the main destination for those on lower incomes.

Further, there is evidence that the relationship between income and domestic holidays is not a linear one. Massidda & Etzo (2012) find that making more international trips is associated with taking fewer domestic trips. This presents evidence that international holidays and domestic holidays may be substitutes for one another.²⁹ Massidda & Etzo (2012) also compare people from the richer North of Italy and the relatively poorer South and find that Southern Italian tourists are four times more income sensitive than Northern Italians. For those on relatively low incomes, domestic tourism demand increases with income, until a certain point when people can afford to holiday abroad instead. Thus, income elasticity switches to having a negative effect on domestic travel, after a certain income threshold has been reached, because people may demand more international holidays instead. Davison & Ryley (2016) find evidence that people on low incomes (survey respondents earning below £20,000) are the most likely to holiday in the UK. They also find that high-income earners also holiday in the UK a lot, but that they also undertake more international holidays compared to their counterparts on lower incomes. In the wider literature, Athanasopoulos & Hyndman (2008) find that income elasticity of holidaying domestically is positive for low-GDP countries, but falls as income grows, eventually becoming negative. The researchers apply this hypothesis to Australia, finding that as economic activity rises, Australians prefer foreign to home destinations for their holidays, hence having a negative relationship.

The conflicting findings on the relationship between income and domestic holidaying may be explained by the omission of variables capturing international holiday demand. It is possible that for those on low incomes, domestic holiday demand is high and international holiday demand is low because the two holiday types are substitutes. Domestic holiday demand may also be high for those on high incomes, but this is possibly because international holidays become complementary goods, as opposed to substitute goods, for those on higher incomes. Another point that is largely neglected by the reviewed literature is that the majority of working people are constrained by the amount of leave that they can take, so are forced to

²⁹ A substitute is a type of good that can be used in place of another good.

carefully allocate their leave to particular destinations. This may be more of a consideration for international travel, because many domestic trips in the UK could feasibly be taken at a weekend when leave may not be required. Leave from work is not as much of an issue for retired people, who have far more flexibility in this regard.

A subset of the papers also examines the role of relative price levels on the decision of whether to take a domestic trip or not. The reviewed literature reaches a fairly strong consensus that more expensive prices at a destination, in terms of the overall cost of a trip, have a negative effect on domestic trips to that destination (Álvarez-Díaz et al., 2017; Massidda & Etzo, 2012; Taylor & Ortiz, 2009; Yap & Allen, 2011).

3.2.2. Destination attributes

The reviewed literature contains evidence that activities and specific destination-related attributes have an influence on domestic tourism, with six papers looking directly at this. Álvarez-Díaz et al. (2017) find that destinations with a higher number of museums, theme parks, natural parks and high-quality beaches receive more domestic tourism. Similarly, Massidda & Etzo (2012) include variables reflecting public expenditure on culture and the number of tourist activities in a location, finding that both have a positive impact on tourism. Davison & Ryley (2016) use a mixed methods approach in their study, calculating correlation statistics and logistic regressions on survey and interview data on a sample of residents from the East Midlands. For the regression analysis, they ask people to state their holiday preferences according to a variety of different statements, and then estimate the impact that these preferences have on the decision of whether to holiday domestically or abroad. They also ask people what the main reason was for choosing their holiday destination, and group the respondents according to whether their holiday had been in the UK or abroad. People who stated that their main reason for choosing a location was for the activities on offer were found to have no statistically significant relationship with preferring a UK rather than an international destination. Similarly, no relationship was found with respondents who selected 'beauty/scenery', 'art/culture and history' or 'beach and/or seaside' as their main reason for selecting a holiday. However, people who selected 'sightseeing' as their main reason for choosing a holiday destination were found to be more likely to take a trip abroad as opposed to domestically. Styliadis et al. (2017) find that destination attributes play an important part in forming the overall image of a destination (in this case, Eilat, Israel), which in turn has an impact on the intention to revisit. Two other papers cluster people into different groups partially based on the type of activities they prefer to do, but do not evaluate the role that activities play on choosing whether to holiday domestically or not (Molinillo & Japutra, 2017; Prebensen & Tkaczynski, 2012).

3.2.3. Demographics

Six papers look at the demographic characteristics of individuals who holiday domestically. There is evidence amongst the reviewed papers that people with children are more likely to holiday domestically (Canavan, 2013; Davison & Ryley, 2016; Hyllemose, 2012) although Pang (2014) finds the factor to be insignificant. Having children can make holidays more expensive, present logistical challenges and create added stress, which may convince many people to choose a domestic holiday instead (Canavan, 2013; Davison & Ryley, 2016). A few papers also include information on gender in their analysis, however the findings are mixed. Pang (2014) finds females are more likely to choose a domestic trip, whereas Molinillo & Japutra (2017) and Hyllemose (2012) find evidence that males are more highly associated with domestic

trips. Two papers find lower education levels are positively associated with more domestic trips to attractions (Hyllemose, 2012; Molinillo & Japutra, 2017), and education level is used to cluster people into different market segments in Prebensen & Tkaczynski (2012). However, it is possible that education levels are correlated with income levels, which would then be subject to earlier caveats on income and domestic holiday demand.

Some studies include other demographic factors – such as marital status, age and employment status – however, much of the evidence is insignificant or inconclusive.

3.2.4. Environmental attitudes

Four papers explore the impact of environmental attitudes on domestic tourism. Caletrío (2012) finds qualitative evidence from interviews that people are prepared to holiday internationally, even though they understand the negative effect on the environment. Many respondents stated that they were not prepared to give up international holidays, even though less than 1 per cent of the sample identified as being climate change sceptics. There was much agreement that the government should pursue an environmentally friendly agenda, but that holidays abroad (mainly by air travel) should be one of the least targeted things. People justified these views on the basis of having a predominantly low-carbon lifestyle or believing the effects of climate change had been over exaggerated. Interviewees also commented that they viewed a holiday as a basic right, i.e. that all people should be allowed the opportunity of international or domestic travel. Further, a government agenda against international holidays would unfairly target the less wealthy, as those on higher incomes would still be able to afford them, creating issues of inequality and social injustice.

That being said, 25 per cent of respondents expressed a willingness to spend their holidays closer to home in order to reduce carbon emissions (Caletrío, 2012). Moreover, Massidda & Etzo (2012) estimate that destinations with higher carbon intensity attract fewer domestic tourists, suggesting some tourists consider the environmental impact of a destination when selecting their location. Similarly, according to research from Davison & Ryley (2016), respondents who report flying less for environmental reasons are more likely to take a domestic holiday over an international one. Hyllemose (2012) finds survey respondents who possess more environmentally friendly attitudes have a more positive attitude towards domestic holidays and a greater intention to holiday domestically.

3.2.5. Weather

Four papers look at how weather contributes towards choosing a holiday destination domestically or abroad (Canavan, 2013; Davison & Ryley, 2016; Hyllemose, 2012; Taylor & Ortiz, 2009). Taylor & Ortiz (2009) use panel data techniques to analyse the influence of temperature and sunshine hours, amongst other things, on UK domestic tourism trips, expenditure and overnight stays using weather data from the Met office and outcome data from the UK Tourism Survey.³⁰ They find that periods of time with higher sunshine levels generate more tourism expenditure, trips and overnight stays. Warmer weather also shows positive effects, although across the two estimated models only half the coefficients are statistically significant. Not only does the attractiveness of the country of origin's climate influence domestic tourism, the climate – or rather

³⁰ Before 2011, the GBTS survey was known as the UK Tourism survey; see VisitBritain, 2019b.

the relative attractiveness of the climate – is also a factor in influencing whether to have a domestic holiday or travel abroad. Davison & Ryley (2016) find that respondents who selected ‘climate’ as their main reason for picking a holiday destination were significantly more likely to holiday abroad rather than in the UK. Further, in the regression analysis, ‘Poor UK weather’ was a variable that significantly influenced people to holiday abroad as opposed to within the UK, revealing that some holidaymakers consider the weather as an influential factor when deciding where to go on holiday. On the other hand, Canavan (2013) finds that residents of the Isle of Man are less likely to let bad weather deter them from making a domestic trip, meaning some domestic tourists may be quite resilient to the effects of bad weather. Hyllemose (2012) also finds that tourists who holiday domestically have similar preferences regarding the weather as those who holiday abroad, suggesting that other factors are perhaps more influential in the decision-making process. However, Jeuring (2017) highlights that preferences may change depending on the time of year, with the weather possibly becoming more of a differentiating factor in winter when international destinations can offer much warmer alternatives.

3.2.6. Transport and accessibility

Transport is an integral complement to the tourism industry, providing opportunities for tourism growth (although poor or expensive transport can also inhibit tourism). Álvarez-Díaz et al. (2017) estimate that an increased number of airports leads to increased domestic tourism. However, this may be less applicable to the UK, where just 2 per cent of domestic overnight trips and 1 per cent of day trips are made via air transport (VisitBritain, 2014). However, it is possible that more airports would increase international travel. Massidda & Etzo (2012) find that regions with more kilometres of road receive more tourists. However, here causation could be in both directions, i.e. more infrastructure and transport connections may be required in areas with higher levels of domestic tourism. Davison & Ryley (2016) find that those who value accessibility the most are more likely to holiday in the UK. Likewise, Hyllemose (2012) finds that individuals who rate the convenience of domestic transport more highly are more likely to holiday domestically. Convenience factored in elements such as shorter transport times, flexibility of being able to use a car or a train and the benefits of not having to switch transportation modes as much.

We judge that the evidence linked to transport infrastructure and domestic tourism is largely inconclusive, on the basis that some of the results, e.g. regarding airports, may not be transferable to the UK context and others fail to account for potential reverse causality. On the other hand, there is evidence that improved accessibility and more convenient travel is positively associated with increases in domestic travel.

3.3. Limitations and research gaps

On balance, the reviewed articles cover a wide range of factors, generating a fairly comprehensive overview of the key areas and factors that influence domestic tourism. However, there are some limitations of the reviewed evidence, presenting some potential caveats to the main findings of this review. These are discussed below.

Much of the evidence is dated: Of the reviewed literature, the median publication date of the article is 2013, often using data that was collected prior to this. This potentially means the literature is not capturing

current preferences and behaviours of holidaymakers and that it may omit current and important trends. An example of this is regarding the impact of technology on tourist destination decision making. Not one of the reviewed papers directly analyses the effect of the Internet on holiday choice. The wider, non-reviewed literature suggests that the Internet has given consumers more information and more choice, ultimately facilitating a shift in power from businesses to consumers (Standing et al., 2014). For example, some studies have shown Airbnb to offer tourists more choice, access to places that may have not previously been accessible, and cheaper prices, enabling people to engage in more travel, both domestically and overseas (Hedlund, 2013; Li & Tabarl, 2019). Similarly, it is possible that other recent trends, such as the rise of the gig economy and flexible working patterns, may also have an impact on people's ability to take holidays and their holiday choices (Yeoman, 2008). Similarly, attitudes towards the environment are constantly evolving, with the UK public reportedly being more concerned about the environment than ever before (Smith, 2019). It is also possible that unpredictable shocks, such as recent terrorist attacks, Brexit and pandemics have the potential to affect domestic holiday demand.

Geographical coverage: Just three of the reviewed articles present evidence about the UK (with one further article talking about the Isle of Man), which raises questions about the transferability of the majority of the evidence to the UK context. For example, decisions about domestic tourism in Australia may be quite different to the UK because the geographical distance between places both domestically within Australia and to travel to international destinations is far greater than in the UK.

Lack of market segmentation analysis: There was little analysis of how different factors influence different holiday types. For example, people wanting a relaxing beach holiday are likely to be influenced by different factors compared to those seeking a city break or an outdoor activities holiday (Hedlund, 2013; Qiu et al. 2018). The reviewed literature does touch upon this; Hyllemose (2012), Prebensen & Tkaczynski (2012) and Molinillo & Japutra (2017) cluster people into certain market segments and Davison & Ryley (2016) ask about the main reason for choosing a holiday destination. Some of the evidence does segment people according to characteristics such as income, which does influence holiday destination decisions. However, income is one of the few factors that is looked at in detail, meaning that the majority of the evidence does not go as far as it could towards determining how underlying market segments are influenced by different factors.

Lack of evidence on the relationship between international trips and domestic trips: Most papers in the review simply focus on the role that certain factors play on domestic travel, without also looking at the impact of international travel. Of the literature reviewed, Davison & Ryley (2016) is the only paper to include international travel as a measured outcome alongside domestic travel, allowing there to be a comparison between how factors influence domestic travel relative to international travel. Massidda & Etzo (2012) is the only paper to include international travel as an explanatory variable and Hyllemose (2012) is the only paper that clusters people based on it. This is problematic, because international travel may be a substitute for domestic travel – and excluding the influence of international travel may impact the study findings. A good example is the role of income, where some papers find that domestic tourism rises as incomes rise, whereas others find the opposite. A key explanatory factor here may be international travel. Increasing income is shown to increase demand for international travel and reduce domestic holiday

demand in Massidda & Etzo (2012), however evidence also suggests that demand for international travel may simply rise as income does, with domestic holiday demand not decreasing substantially (Davison & Ryley, 2016). It is likely that there is a non-linear relationship. Further, looking at other research – such as that by Eugenio-Martin & Campos-Soria (2011) – may enable a better understanding of the relationship and how confounding factors such as age and available leisure time affect holiday behaviour.

Lastly, certain factors, such as the role of events, transport access and some demographic factors, are included in too small a subset of the literature for many strong conclusions to be drawn.

In summary, the key drivers influencing domestic tourism derived from the literature are a valuable resource. However, there are a few research gaps identified through the REA that require further up-to-date research on understanding the main drivers that influence domestic tourism decision making.

4. The influence of publicly funded marketing

This section presents the evidence on the influence of publicly funded marketing, including:

- Overview of the evidence;
- Evidence on publicly funded marketing: the impact of domestic tourism marketing, deals, brand salience, social media and destination branding;
- Conclusion and research gaps identified from the REA.

4.1. Overview of the evidence on the influence of publicly funded marketing

4.1.1. Lack of existing evidence

A key insight emerging from the REA is the lack of existing evidence concerning the role and impact of publicly funded domestic tourism marketing. Of the ten papers reviewed in this part of the assessment, only five address publicly funded marketing focused explicitly on domestic tourism (Jarratt et al., 2019; Pratt et al., 2010; Rosslee & Chapman, 2015; Steinmetz et al., 2016; Trembath et al., 2011). Four of the papers deal with destination marketing that could include domestic tourism, but is not necessarily limited to it (Heeley, 2016; Mariani et al., 2016; McCabe & Branco Illodo, 2019; Pike & Page, 2014). One paper addresses destination marketing targeted at international tourists (Hays et al., 2013).

It is clear from our initial screening of the REA search results that there exists a considerable literature on the role and impact of destination marketing more broadly, including by public bodies. The limited number of directly relevant papers identified by our assessment, however, demonstrates a shortage of studies focusing specifically on the role and impact of destination marketing for domestic tourism specifically, an observation confirmed by discussion with experts during the internal workshop. The evidence gap is accentuated further when it comes to studies addressing domestic tourism marketing *within the UK*. Of the five studies that directly addressed domestic tourism marketing, only three of these focused on the UK context specifically (Jarratt et al., 2019; Pratt et al., 2010; Rosslee & Chapman, 2015).

4.2. Introduction

This section reviews the evidence concerning the role and impact of publicly funded domestic tourism marketing on decision making. It begins by discussing the lack of existing evidence in this area. While there is a considerable literature on destination marketing and its impacts, little of this addresses the impact of

marketing campaigns targeted specifically at domestic tourists. There are also systemic problems concerning the methods available for measuring the impact of destination marketing. From this point, the section moves to consider what evidence *can* be drawn from the literature, notwithstanding these limitations. Specifically, it reports on the evidence available in the following areas:

- (i) the impact of destination marketing on travel decisions, specifically destination choice;
- (ii) the impact of marketing on other decisions relating to travel;
- (iii) the impact of deals on travel decisions;
- (iv) the impact of 'brand salience' on travel decisions;
- (v) the use of social media as a destination marketing tool;
- (vi) branding strategies as applied to destinations.

Some of this evidence is taken from studies of domestic tourism marketing by public bodies. Owing to the aforementioned limitations, however, some of it is drawn from studies of destination marketing in other contexts.

Table 3 Summary information from papers reviewed

| Paper | Geography | Focused on domestic tourism? | Methods | Sample size | Key findings on effective destination marketing |
|---|---------------|---|---|--|--|
| Pike & Page (2014) | International | No (domestic and international tourism) | Literature review | N/A | Destination brand identity (including brand personality). Destination brand image, and destination brand positioning are important factors in destination marketing. |
| Pratt, McCabe, Cortes-Jimenez, & Blake (2010) | UK | Yes | Conversion studies | Approximately 6,000 survey responses | Destination marketing does have some impact on tourist decision making and produces return on investment for many DMOs. Higher campaign cost and generic marketing are positively correlated with return on investment. |
| Steinmetz, Park, & Fesenmaier (2016) | US | Yes | Survey, frequency analysis, multivariate regression analysis) | 2,885 survey responses | <p>Destination marketing has more impact on other travel decisions, rather than destination choice.</p> <p>Advertisements focusing on attractions, restaurants and hotels have the most impact on travel expenditure.</p> <p>Traveller expenditure increases with the following trip and traveller characteristics: weekend getaways; larger party size; travellers visiting a destination for the first time; and travellers obtaining information through means other than destination websites.</p> |
| McCabe & Branco Illodo (2019) | UK | No (domestic and international tourism) | Focus groups | 5 focus groups (36 total participants) | <p>Travellers adopt flexible attitudes towards deals and promotions depending on a number of characteristics including the holiday context, stage in the life cycle and trip type.</p> <p>Positive attitudes towards deals are associated with international trips and domestic short breaks.</p> |
| Trembath, Romaniuk, & Lockshin (2011) | Australia | Yes | Interviews, survey, logistic regression | 20 interviews; 229 responses | 'Brand salience' is a more significant factor than 'brand attitude' in influencing domestic travellers' intention to visit a destination. |

| | | | | | |
|--------------------------------------|--|---|--|---|--|
| Rosslee & Chapman (2015) | UK | Yes | Interviews, document review, survey, statistical analysis | 3 interviewees; 125 survey responses | Some destination management organisations seek to create distinct destination personalities. Travellers seek congruence between self-concept and the perceived destination brand personality of the places they visit. |
| Hays, Page, & Buhalis (2013) | Mexico, Malaysia, Germany, UK, Turkey, France, Spain | No (international tourism) | Interviews, content analysis | Facebook and Twitter data from 7 tourism boards' official accounts, totalling 661 posts or tweets; 7 interviews | DMOs are not using social media to effectively engage with potential customers. Effective social-media-based destination marketing should be: active, interesting, humble, informal and honest. |
| Mariani, Di Felice, & Mura (2016) | Italy | No (domestic and international tourism) | Interviews, social media data analysis, engagement metrics, regression | Facebook data from 19 Italian DMOs, totalling 33,597 posts; 17 interviews | Visual content and moderate post-length have a positive impact on end-user engagement with DMO social media profiles. High post-frequency and posts early in the day have a negative impact. Italian DMOs still deploy social media in a 'traditional top-down manner', rather than making use of interactive user-driven approaches to engage with users and consumers. |
| Heeley (2016) | EU | No (domestic and international tourism) | Literature review, desk research, interviews | Online investigation of urban destination-marketing in 62 European towns and cities; 20 interviews | EU urban DMOs are not making effective use of 'competitive advantage' in their marketing. |
| Jarratt, Phelan, Wain, & Dale (2019) | UK | Yes | Interviews, participant observation, document review | 2 interviews; 'series of workshops' | 'Sense of place' toolkits can play a role in promoting coherence in destination branding, including the creation of destination brand personality. |

4.2.1. Challenges of measuring the influence of destination marketing

A second key finding from the REA concerns the challenges involved in measuring the impacts of publicly funded destination marketing activities. This, it seems, is a point relevant not just to domestic tourism, but to all forms of publicly funded destination marketing. In other contexts (e.g. product marketing), the impact of marketing can be tracked through statistics such as sales. In the context of publicly funded destination marketing, however, wherein the aim is to promote a region or resort in its entirety, fewer straightforward mechanisms exist with which to measure the impact that marketing has had (Pratt et al., 2010). The problem is exacerbated by needing to separate the impacts of domestic and international tourism.

In their review of the destination marketing literature, Pike & Page (2014) outline a number of approaches that have been used to try and measure the impact of destination marketing. The first is the use of visitor metrics, for example hotel occupancy rates, involving the measurement of 'a ratio of DMO marketing spend and spending by visitors from those markets' (Pike & Page, 2014). Visitor metrics can help to provide 'a degree of accountability' in terms of return on investment. However, they offer little insight on the relationship between cause and effect (Pike & Page, 2014). They also reflect both domestic and international tourists.

A second approach to measuring the impact of destination marketing is that of conversion studies. Here, the aim is to analyse the number of people requesting marketing materials who subsequently go on to visit (and/or book to visit) the destination in question. In most cases, conversion studies gather this information through surveys using a sample of those who requested travel information from a destination marketer. The result is a 'conversion ratio' comprising the percentage of travellers who visit or book to visit after requesting travel information (Pike & Page, 2014). Like visitor metrics, conversion studies suffer from a number of shortcomings on the question of causality. Most significantly, they do not account for the range of extraneous variables (besides marketing) that may play a role in the individual's decision to visit a destination (Pike & Page, 2014; Pratt et al., 2010; Steinmetz et al., 2016). Further, as people move to the use of Internet sources and social media for gathering information for holidays, it is less likely that those requesting information from a destination marketer will be representative of the holiday market.

Pratt et al. (2010) propose an alternative to the traditional conversion method. Rather than relying on 'gross conversion rates' (the overall number of respondents who visited after receiving marketing materials), the authors use 'net conversion rates' to more accurately reflect the number of people whose destination choices had actually been influenced by a marketing campaign. The researchers assign 'weights' to each respondent based on their responses to the survey questions. The weighting helps to exclude those who had already booked a trip at the time of receiving marketing materials or who felt that marketing had not played a significant role in their decision (Pratt et al., 2010). The approach goes some way to addressing the causality problems associated with conversion analysis. At the same time, it also relies (in certain places at least) on respondents' own perceptions of the factors that influenced their decision. It also does not address the issue of the use of online marketing materials and social media for obtaining holiday information.

4.2.2. De-seasonalisation, dispersion and extension

Finally, we find little or no evidence on the impact of publicly funded campaigns on moving trips outside of the peak (de-seasonalisation), moving holiday trips to different regions (dispersion) or extending the

duration of trips. Indeed, on de-seasonalisation, one paper singled this out as ‘the most neglected area of DMO performance’ (Pike & Page, 2014).

4.3. Evidence synthesis

The shortage of literature on publicly funded domestic tourism marketing, combined with the broader problem of measuring destination marketing effectiveness, has important implications for our assessment. Most significantly, it means that there is limited evidence available to actually address the core research question (and sub-questions) assigned to this part of the study. Nevertheless, the papers reviewed by our REA do provide numerous insights concerning the impact of publicly funded destination marketing on the decisions made by domestic tourists. Some of this evidence is taken from studies of domestic tourism marketing by publicly funded bodies. In some cases, however, the evidence is drawn from studies of destination marketing in other contexts.

We have categorised the evidence into the following areas: (i) the impact of destination marketing on domestic tourists’ travel decisions, specifically destination choice; (ii) the impact of marketing on other decisions relating to travel; (iii) the impact of deals on travel decisions; (iv) the impact of ‘brand salience’ on travel decisions; (v) the use of social media as a destination marketing tool; and (vi) branding strategies as applied to destinations. Each of these is discussed in more detail below.

4.3.1. Impact of domestic tourism marketing on travel decisions

Pratt et al. (2010) measure the effectiveness of destination marketing using an adapted version of the conversion studies approach incorporating ‘net conversion’ (see above). They apply this method to the study of 18 UK domestic tourism marketing campaigns, all of which took place within the East Midlands region. The study combines measures of gross and net conversion with analysis of: (i) ‘incremental expenditure’ – the additional revenue generated by those who are converted to the destination as a direct result of the campaign (visitors) and those who extended their stay in the destination as a direct result of campaign (extenders); and (ii) ‘return on investment’ – the incremental expenditure generated by the campaign divided by the costs incurred.

With respect to conversion rates, the study finds an average net conversion rate of 18 per cent across the campaigns. The average gross conversion rate was 43 per cent, with an average discrepancy between gross and net conversion rates of 24 per cent. With respect to incremental expenditure, the study finds ‘considerable variability’ across the campaigns, ranging from £22,584 to £12,116,573. Significantly, the split between expenditure generated by visitors and expenditure generated by extenders is approximately 6:1 (85 per cent to 15 per cent on average across the campaigns), suggesting that destination marketing is more effective in generating new trips than encouraging the extension of already booked ones. Return on investment averaged 10:1 across the campaigns. On this point, however, there existed a significant degree of variation. Six of the campaigns produced more than 15:1 return on investment. Six others generated less than 2:1 return (Pratt et al., 2010).

Pratt et al. (2010) make two further observations concerning the relationship between marketing, conversion, expenditure and return on investment. First, they find a positive correlation between the cost of the campaign and its return on investment (more expensive campaigns produce greater return on

investment). Second, they find that 'generic' marketing campaigns perform better than 'niche' marketing campaigns across a number of measurements, including total expenditure, revenue per inquiry and return on investment. Niche campaigns were those that targeted special-interest groups and used specialised marketing tools, such as online campaigns. Generic campaigns were less targeted and relied on more traditional marketing strategies (Pratt et al., 2010).

Steinmetz et al. (2016) used an adapted version of the conversion method to study the impact of domestic tourism marketing on both destination choice and *other* trip-related decisions, such as choice of accommodation, restaurants and visits to attractions. The focus of the study is on American travellers who had requested travel-related information from five different US states and regional tourism offices between April 2010 and April 2011. The study finds that only 14.7 per cent of respondents who travelled to a destination after requesting information were influenced to visit the destination by the advertising campaign. By comparison, the number of travellers whose other travel-related decisions were influenced by destination marketing was consistently higher. 58.4 per cent of the travellers were influenced by destination advertising to visit a featured attraction. 48.4 per cent were influenced to visit advertised restaurants. 37.8 per cent were influenced to attend a featured event (Steinmetz et al., 2016). The study also finds that advertisements that influenced travellers to visit featured attractions, restaurants and hotels had a significant positive impact on visitor spending. Advertisements that influenced destination choice, trips to special events, shopping trips and trips to visitor centres were not statistically linked to increases in visitor expenditure (Steinmetz et al., 2016).

4.3.2. Impact of deals on traveller decisions

Alongside more general marketing activities, deals represent one potential means through which to promote domestic tourism. McCabe & Branco Illodo (2019) examine the influence of 'deals' (including discounts and promotional offers) on tourist decision. To do so, the researchers conducted five focus groups comprised of UK tourists selected to cover a range of demographics. Based on the focus group discussions, the study identifies four categories of attitudes towards deals: (i) 'deals as a way of life'; (ii) 'deals as a bonus'; (iii) 'deals as a problem'; and (iv) 'deals as toxic'. 'Deals as a way of life' signifies both a susceptibility to deal offers and an active willingness to search for deals. At the other end of the spectrum, 'deals as toxic' signifies an aversion towards deals for fear that they might compromise holiday experience. 'Deals as a bonus' signifies a willingness to avail of deals, but only in certain circumstances. 'Deals as a problem' signifies an inclination towards deals, but an inability to do so due to restrictions beyond the consumer's control, for example limited availability or the constraints imposed by travelling with young children (McCabe & Branco Illodo, 2019).

The study finds that individuals do not remain fixed within one of these attitude categories, but instead move flexibly between them according to a range of factors. One factor is the holiday context, including the question of *whether the holiday was domestic or international*. While participants consider deals a bonus when travelling internationally, some see deals a problem when travelling within England, since obtaining value for money is difficult. Another factor is the stage in the life cycle, with some people moving from deals as a way of life to deals as a bonus after they had families. Destination type is another factor associated with varying value perception, with positive attitudes towards deals more likely in the

case of short-break domestic holidays, as opposed to longer holidays (McCabe & Branco Illodo, 2019). Linking factors one (holiday context) and three (destination type) together, a significant finding from this study is that while participants generally hold positive attitudes towards deals for short domestic breaks, some also feel that deals are a ‘problem’ when travelling in England, primarily because deals for domestic trips offer limited value for money (McCabe & Branco Illodo, 2019).

4.3.3. Impact of brand salience on traveller decisions

Trembath et al. (2011) study the impact of ‘destination salience’ on Australian domestic tourists’ destination choices. The concept of destination salience is drawn from the broader marketing concept of ‘brand salience’. In contrast to a consumer’s attitude towards a brand (‘brand attitude’), brand salience refers instead to the capacity of the brand to be ‘retrieved’ and recalled by the consumer. Drawing on a body of marketing literature that has suggested the seminal role of brand salience on consumer behaviour, the authors analyse the impact of salience on travel intentions using a survey of travellers known to be interested in domestic travel. For each participant, salience of seven Australian cities was measured using salience stimulus cues, with salience then tested against the participant’s prior visitation to and their future intent to visit the destination. Destination attitude measures were also taken using a five-point scale (Trembath et al., 2011).

Using multivariate logistic regressions, the researchers find that destination salience is significantly related to intention to visit – even after taking into account previous visitation – a finding that is consistent across all seven capital cities. By contrast, destination attitude does not contribute significantly to intention to visit. According to the authors, the findings suggest the need for a marketing approach that increases the likelihood of recall in purchase situations, rather than one that seeks to shape how consumers think about a destination (Trembath et al., 2011).

4.3.4. Use of social media as a destination marketing tool

Two of the papers considered in the REA examine the use of social media by DMOs. Hays et al. (2013) analyse the Twitter accounts of DMOs in the top ten most visited countries by international tourists, combining content analysis with interviews and industry reports. A key finding is that many DMOs demonstrate little understanding of how social media could be used as an effective marketing tool. Highlighting lessons derived from a broader literature on effective social media marketing – including five key principles set out by Kaplan & Haenlein (2010) for managing a social media presence (be active, be interesting, be humble, be informal, be honest) – the authors find that in many cases DMOs are ‘not currently utilising social media to their full effectiveness when it comes to the ability to interact and engage with consumers’ (Hays et al., 2013).

Mariani et al. (2016) studied the Facebook marketing activities of 19 Italian regional DMOs over the course of one year (2013). In this case, the authors conduct a quantitative content analysis including both descriptive statistics and multivariate regression analyses. The results analyse end-user engagement with DMO Facebook profiles, including a number of engagement metrics applied both generally and as a function of post type. The most significant findings of the study concern the impact of post type on end-user engagement. Visual content and moderately long posts are shown to have a statistically significant

positive impact on engagement metrics. Higher post frequency and early daily posting, by contrast, have a negative impact on engagement (Mariani et al., 2016). According to the authors, many Italian DMOs still deploy social media in a 'traditional top-down manner', rather than making use of interactive user-driven approaches to engage with users and consumers (Mariani et al., 2016).

Significantly, while both Hays et al. (2013) and Mariani et al. (2016) provide insights into the ways in which DMOs could use social media more effectively to engage audiences and end-users, neither paper addresses the relationship between end-user engagement and actual travel decisions.

4.3.5. Destination branding

As noted above, some reports have pointed to the importance of 'brand salience' on travellers' intention to visit a destination. Other studies have, however, highlighted the role of other factors that make for effective destination branding. In their review of destination marketing literature, Pike & Page (2014) identify three core concepts reported in studies of destination branding: destination brand identity; destination brand image; and destination brand positioning. Destination brand identity comprises the 'vision for how the destination should be perceived in the marketplace, with the aim of achieving differentiation' (Pike & Page, 2014). A cohesive brand identity will include components such as values, key competitors, positioning statement, key attributes and benefits, and target audience. A subset of destination brand identity is the concept of destination brand personality, conceived as a set of human characteristics associated with a destination. Whilst destinations are inanimate, research has suggested that their tangible and intangible assets enable them to be attributed with personality characteristics (Pike & Page, 2014).

Distinct from destination brand identity, destination brand image is the actual image of the destination held by consumers. Destination brand positioning, meanwhile, constitutes the attempt to achieve congruence between destination brand identity and destination brand image. A key element of destination brand positioning is the process of distinguishing the brand identity from other competitors in the market place. Here, strategies that effectively reinforce the brand identity, including memorable slogans, are deemed to be of particular importance (Pike & Page, 2014).

The three concepts of brand identity, brand image and brand positioning are all drawn from beyond the tourism field. In recent decades, however, there has been a growing number of attempts to apply these concepts to destinations. Pike & Page (2014) observe a number of key challenges inherent in applying these concepts to destination marketing, one of which is the fact that destinations, unlike other types of brand, are complex formations made up of various component parts. In a destination context, the creation of a coherent brand identity requires the engagement of all stakeholders within the host community. It also requires the cooperation of those stakeholders in consistently communicating and positioning the brand identity (Pike & Page, 2014).

Other papers provide insights on the ways in which destinations, including UK domestic tourist destinations, have sought to apply these branding concepts within their marketing. Rosslee & Chapman (2015) study destination personality in three English Riviera resorts – Brixham, Paignton and Torquay. The authors find evidence that each resort had attempted to create 'unique, individual and differentiated destination personalities'. Through interviews with visitors in each of the three resorts, however, it also finds significant differences between these destination personalities and visitor brand image. In the case of

Paignton, for example, efforts to promote destination personality traits of ‘nostalgic’ and ‘traditional’ sit in contrast with visitor perceptions of the resort as being ‘up-to-date’ (Rosslee & Chapman, 2015). A second aspect of this study considers the extent to which there exists congruence between visitors’ own self-conceptualisation and their perceptions of destination personality. Here, the researchers draw upon a finding from a wider body of research that had suggested ‘consumers choose brands that are an extension of themselves’ (Rosslee & Chapman, 2015). In the context of the English Riviera resorts, the paper finds some congruence between self-concept and perceived destination personality across all three destinations, with significant levels in the case of Torquay. At the same time, it also finds mixed evidence that such congruence influenced intention to either recommend or to return (Rosslee & Chapman, 2015).

While Rosslee & Chapman (2015) find evidence that DMOs do seek to create distinct brand identities (and more specifically, brand personalities), a study by Heeley (2016) argues that many European urban DMOs fail to develop branding strategies that effectively distinguish the destination’s unique features and its ‘competitive advantage’ over others. The study used literature reviews, online research and interviews to analyse the marketing campaigns of urban DMOs. Even in those situations where destinations possessed genuine competitive advantage, it finds that DMOs invariably failed to market this difference, resorting instead to a ‘marketing of everything’ strategy that failed to cultivate a distinct brand identity or brand position (Heeley, 2016).

Jarratt et al. (2019) study the development of a ‘sense of place’ toolkit in the UK domestic tourist destination of Morecambe Bay, Lancashire, finding that this process had positive implications for the development of coherent destination identity and personality. Typically developed through workshops with destinations stakeholders, ‘sense of place’ toolkits aim to foster a common understanding of the key assets – physical, social and cultural – that characterise the destination and constitute its unique appeal. The resulting toolkit comprises a document containing information such as unique (local) selling points, branding guidelines and recommendations for improving the visitor experience. In the case of Morecambe Bay, the authors find that a ‘sense of place’ toolkit helped to strengthen destination identity and to ‘clarify unique selling points and develop a more distinctive offering within an increasingly competitive visitor economy’ (Jarratt et al., 2019). They also report on the development of similar toolkits in other destinations, including the Lake District National Park, the Forest of Bowland AONB and Wales (Jarratt et al., 2019).

4.4. Summary of main findings

Regarding the influence of destination marketing, the **following evidence** can be drawn from the REA:

- As measured by conversion studies, destination marketing activities can have an impact on traveller destination choice.
- Travellers seem to have variable attitudes towards deals and promotions depending on the holiday context, the stage in the life cycle and the destination type.
- Many DMOs, both domestic and international, are not using social media to effectively engage with potential customers. However, it should be noted that this finding is based on studies

published in 2013 and 2016. Research shows visual content and moderate post-length have a positive impact on end-user engagement with DMO social media profiles.

- A number of key branding concepts derived from the broader marketing literature may have applicability in the context of destination marketing, including in the context of domestic tourism. ‘Sense of place’ toolkits can play an important role in effective destination marketing, including in the cultivation of cohesive destination brand personalities.
- The robustness of these findings is limited by the shortage of literature on publicly funded domestic tourism marketing. Several of the above findings of this chapter are drawn from studies undertaken in other contexts, including international destination marketing or domestic tourism marketing in other countries.
- The robustness of findings is also limited by the broader problem of measuring destination marketing effectiveness.

5. Summary, findings and evidence gaps

This report collates and summarises published literature on the drivers and factors influencing domestic tourism, with a special focus on the impact of publicly funded domestic tourism marketing. This concluding section summarises findings from the literature review and identifies evidence gaps.

5.1. Summary of the research findings on the factors influencing domestic tourism and research gaps

The REA has identified a wide range of the factors and drivers influencing domestic tourism. The main findings are outlined below, followed by a discussion of the limitations of the evidence on which they are based and the research gaps that have been identified.

- Economic factors (which include GDP, income, relative price and exchange rate) are found to be the most prominently researched factors linked with domestic tourism. A number of studies find positive and high GDP or income elasticities for domestic tourism, but others find negative effects, i.e. that those with higher incomes are less likely to undertake domestic tourism. A key distinguishing factor between some of these studies is whether they explicitly take account of international travel, which could be a substitute for domestic travel, particularly for those with higher incomes.
- Activities and specific destination-related attributes have an important impact on where people choose to travel and the level of domestic tourism.
- Demographic characteristics, particularly the presence of children, has been shown to impact the propensity for undertaking domestic holidays. There is some evidence linking lower education levels and domestic tourism. There is little evidence on other demographic factors – such as marital status, age and employment status – on domestic tourism levels.
- The evidence on environmental attitudes and domestic tourism is mixed. There is some evidence that those with more environmentally friendly attitudes have a more positive attitude towards domestic holidays and a greater intention to holiday domestically. However, there is also evidence that many people view taking a holiday – either internationally or domestically – as a basic right, and consider that government interventions against international holidays would unfairly target the less wealthy.
- Weather – both in the country of origin and in destination countries – has been shown to influence the decision to take a domestic holiday or travel abroad.

- Lastly, the impacts on transport infrastructure on domestic tourism are inconclusive, whereas improved accessibility is positively associated with domestic tourism.

The limitations of the existing evidence base have led to a number of research gaps being identified:

- The published evidence is dated and some evidence is limited by small sample sizes. Moreover, the influence of recent geopolitical trends like Brexit, security issues like pandemics, and new technology and services – such as the influence of the Internet, social media, Airbnb and TripAdvisor, etc. – do not seem to be picked up in the academic literature
- There is a dearth of evidence on the analysis of substitutes (for instance international vs national travel; geographical regions within a country, etc.), which affects the resulting importance of other factors, particularly income elasticities. For instance, the REA found conflicting findings on the relationship between income and domestic tourism, which may be partly explained by the omission of variables capturing international holiday demand. It is possible that at low incomes, domestic holiday demand is high and international holiday demand is low due to the two holiday types being substitutes. Domestic holiday demand may also be high for those on high incomes, but this is possibly because international holidays become complementary goods, as opposed to substitute goods, for those on higher incomes.
- Most research – and especially the reviewed research that was based in the UK – contains limited segmentation in terms of types of tourism, types of travellers, etc. Income is one of the few factors that is looked at in detail, meaning the majority of the evidence does not go far enough in determining how underlying market segments value certain factors differently. Furthermore, most research is focused on a limited number of factors, so only addresses a subset of those factors of interest.

5.2. Summary of the research findings on the impact of publicly funded campaigns, and research gaps

Overall, we found very limited evidence concerning the role and impact of publicly funded domestic tourism on decision making. There is some literature on destination marketing, however little research has addressed the impact of publicly funded campaigns on marketing, particularly concerning methods used to measure the impact of publicly funded campaigns. Below we summarise the key findings and evidence gaps.

- **There are several challenges in measuring the impact of publicly funded campaigns/domestic marketing:**
 - Visitor metrics, for instance hotel occupancy rates, can be used to support estimation of returns on marketing investments, particularly in terms of estimating the spend by visitors. However, such metrics offer little insight on the relationship between cause and effect. They also reflect both domestic and international tourists.
 - Conversion studies aim to quantify how many people who request marketing materials actually go on to visit the destination in question. These studies have limitations, specifically, in terms of controlling for the effect of other extraneous variables (factors that

may also influence the domestic tourism destination choice). Further, this method is becoming less appropriate due to multi-channel distribution of marketing materials (e.g. through social media, etc).

- **There is a dearth of evidence on the impact of publicly funded campaigns** on moving trips outside of the peak (de-seasonalisation), moving trips to different regions (dispersion) or extending the duration of trips.

In addition, the REA provides a number of insights concerning the impact of publicly funded campaign and destination marketing on domestic tourism decisions, which may inform the future strategies and approaches of publicly funded campaign:

- Evidence shows that **deals, discounts and promotions** have impacts on tourists' destination decision making. The impact of these may vary for different types of tourist.
- Evidence suggests that '**destination salience**' has a significant impact on domestic tourism, particularly the destination choice.
- **Social media** has been shown to be an effective marketing tool. However, evidence suggests that many DMOs 'are not currently utilising social media to their full effectiveness when it comes to the ability to interact and engage with consumers'. It should be noted that this finding is based on studies published in 2013 and 2016.
- Lastly, broader marketing approaches such as branding strategy have been found to be applied to destinations. For instance, **destination branding** – which includes destination brand identity, destination brand image and destination brand positioning – are currently applied to tourism destination marketing. Challenges are experienced in the application, partly due to the very complex destination brand formations. The evidence is mainly focused on regional or individual resorts.
- The robustness of these findings is limited by the shortage of literature on publicly funded domestic tourism marketing. This includes the fact that some of these findings are drawn from studies focused on other contexts, such as international destination marketing and destination marketing in other countries.

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Annex A. Search protocol

A.1. Introduction

The literature review aims to provide a comprehensive, systematic and critical assessment of the scope and quality of available evidence from published literature to better understand factors influencing the domestic tourism market, with a specific focus on the impact of publicly funded marketing, specifically:

- What are the factors that influence UK residents' decisions to take domestic trips within the UK?
- What is the role and impact of publicly funded domestic tourism marketing in that decision-making process, including on:
 - (i) the time of year when the trip is taken (e.g. to encourage trips out of the peak seasons);
 - (ii) encouraging trips to specific geographic regions, particularly outside London;
 - (iii) determining whether to take a trip in the UK, to travel abroad or not to take a trip at all;
 - (iv) determining whether to make a trip to a specific geographic location, as opposed to the experience/product available at that location;
 - (v) extending trips (e.g. extending a day trip to a longer stay)?

This annex summarises the proposed search terms, inclusion criteria and databases used in the literature review. Pilot tests have been undertaken to examine the search terms and strategies.

A.2. Systematic literature search

Databases

The database selection is made based on experience and the types of journals that are expected to be relevant, given the relevant topic areas and literature already known to the study team. Some example journals are listed below:

- a. Tourism (*Journal of Travel Research, International Journal of Tourism Research, Journal of Travel & Tourism Marketing*)
- b. Marketing (*Journal of Destination Marketing and Management, International Journal of Consumer Studies*)
- c. Transport and location (*Journal of Urban Economics, Regional Studies, Journal of Rural Studies, Transportation Research Part D: Transport and Environment*)

d. Activities (*Journal of Leisure Research*)

In conjunction with the RAND librarian, the following databases have been selected:

- Academic Search Complete
- Business Source Complete
- Econlit
- Scopus
- TRID

Adapted versions of the searches developed here were also applied in Google and Google Scholar to capture organisational reports and other grey literature. Other organisational websites were directly searched.

Inclusion criteria

We developed inclusion criteria for use at the screening stage to identify the longlist of potential documents for review. These inclusion criteria are presented in Table A.4 below. Publication dates were considered further when identifying a manageable number of results to screen. The geographical criterion limits the review to studies that can be considered similar to the UK and may allow for transferability of key messages and results. While it is possible to control for these directly in some databases, the geographical range is generally most easily controlled for in EndNote by the librarian.

Table A.4 Inclusion Criteria

| |
|---|
| General |
| Published in or after 2005 |
| English language, UK focus, comparison study with UK or study of OECD/EU countries ³¹ |
| Type of publication/study |
| Conference abstract/paper |
| Journal article – systematic reviews, REAs, quantitative, high-quality observational and qualitative studies |
| High-quality agency reports (e.g. OECD, MHCLG, EU, WTTC) |
| PhD theses |
| Scope |
| Studies that provide evidence as to what influences UK residents’ decisions to take domestic trips within the UK (quantitative/qualitative) |

³¹ UK, Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Australia, Canada, Israel, Japan, Korea, New Zealand, Norway, United States. Additionally European Union, EU and OECD.

Studies that provide evidence on role and impact of publicly funded domestic tourism marketing in that decision-making process (quantitative/qualitative)

Search strategies

We undertook two types of searches: the first focusing on what may be considered more ‘traditional’ factors influencing domestic trip choices; and the second focusing on the role of marketing in the process. The way the search terms are implemented in the databases may differ slightly as they have different structures and nomenclature. In general, terms in titles, abstracts and key words are searched. There may be overlap between the results from the searches and we used relevant information from both.

Search strategy 1: Identifying literature related to the role of ‘traditional’ factors on domestic tourism

For this search, a set of terms relating to domestic tourism is combined with factor-related terms, shown in Table A.5.

The search terms from the different columns are combined as follows:

- a. Trip AND economic factors
- b. Trip AND climate factors
- c. Etc

Table A.5 Search terms for search strategy 1

| Trip | Specific Factors |
|--------------------|---|
| staycation | <u>Economic</u> |
| or | Cost or value for money or economy* or financial or return on investment |
| (Domestic) trip* | <u>Climate</u> |
| or | Environment or climate or weather |
| (Domestic) holiday | <u>Quality of service</u> |
| or | (Comfort or quality or convenience/ease) AND (transport or accommodation) or travel time |
| (Domestic) break | <u>Destination attributes</u> |
| or | Leisure or activities or familiar or experience |
| Domestic touris* | <u>Population and social change</u> |
| or | Age or children or elderly or disabled or family or VFR or ‘visiting friends and relatives’ or consumer behaviour |
| Domestic travel | Technology |
| Local holiday/trip | |
| or | |
| Weekend break/trip | |
| or | |
| Domestic vacation | |

| | |
|---|--|
| or (Domestic) Short/city break/trip or Near-home tourism.... | |
|---|--|

Notes: *indicates a wildcard so that, for example, touris* covers tourism, tourist, tourists, etc.
Local holiday/trip =local holiday or local trip

Search strategy 2: Identifying literature on the influence of publicly funded marketing campaigns on domestic tourism

Several approaches will be implemented for this search strategy:

- 1) Search strategy 2a – ‘Destination marketing’ as a single search term.
- 2) Search strategy 2b – Terms relating to marketing, tourism and behavioural drivers from Table A.6. Searches based on combinations of terms in the columns:

Marketing terms AND activity terms AND Mechanism terms
(e.g. marketing AND travel AND context-based).

Table A.6 Search terms for search strategy 2b

| Marketing | Activity | Mechanism |
|--|--|--|
| Marketing Campaign Advertising Targeting | Travel Destination Leisure Touris* Holiday | Context-based Personal* Behavioural Nudg* |

- 3) Search strategy 2c – The search aims to directly find publicly funded marketing literature using terms from Table A.7. Terms from columns combined in the same way as previous search strategies.
- 4) Search strategy 2d – ‘Evaluation of marketing’. This search will potentially be used if insufficient evaluation literature is recovered from the other approaches, as it is likely to generate a large number of hits.

Table A.7 Search terms for search strategy 2c

| Marketing | Activity | Public body |
|------------------|-------------------|--------------------------------------|
| Marketing | | state |
| Campaign | Travel | public (sector) |
| Advertising | Destination | government |
| Targeting | (Leisure) | national |
| Branding | Touris*/(holiday) | DMO |
| Policy | | 'Destination marketing organisation' |
| | | Local |

Note: DMO = Destination marketing organisation, but the abbreviation is quite widely used.

Pilot tests

Pilot tests are used to check that the search terms are likely to pick up a sufficient number of relevant results, balancing the need to cast the net broadly against the need for a manageable number of results to screen – given that a range of terminology may be used in titles, keywords and abstracts.

The following searches were tested by the librarian using the Scopus database only:

- 1) A general search, subject to the inclusion criteria, to determine the breadth of the available literature. For this search we combined search terms from the first column of Table 2 with some general factors:

Trip terms AND general factors

I.e. (Staycation or trip or holiday or break or touris*, etc.) AND (Influence or driver or factor)

This search returned 34,000 hits and is too broad to consider further.

- 2) Domestic or local prefixes were then added to the trip terms and the search repeated.

The revised search generated 260 hits only before screening.

- 3) Trip terms AND Specific factors.

This search generated 311 hits before screening. After screening and comparison with search 2, search 3 was found to generate a larger number of potentially relevant results, also encompassing those from search 2. This search was retained for the main implementation.

- 4) Destination marketing (limited to UK only). This search returned 33 hits.
- 5) Search strategy 2b (limited to UK). This search returned 149 hits.
- 6) Search strategy 2c (limited to UK). This search returned 117 hits.

Example potential papers/articles from proposal:

‘The German Rail campaign Facebook’s Sheryl Sandberg called “the future of advertising”’, available at: <https://www.contagious.com/news-and-views/german-rail-campaign-facebook-sheryl-sandberg-called-the-future-of-advertising>

Pike, S., & Page, S.J. (2014). ‘Destination Marketing Organizations and destination marketing: A narrative analysis of the literature.’ *Tourism Management*, Volume 41, 202–227, available at: <https://doi.org/10.1016/j.tourman.2013.09.009>

Pratt, S., McCabe, S., Cortes-Jimenez, I., & Blake, A. (2010). ‘Measuring the Effectiveness of Destination Marketing Campaigns: Comparative Analysis of Conversion Studies.’ *Journal of Travel Research*, 49(2), 179–190. Destination Management/Marketing Plans for DMOs/LEPs, available at: <https://doi.org/10.1177/0047287509336471>

Hamilton, J. & R.S.J. Tol. (2007) ‘The impact of climate change on tourism in Germany, the UK and Ireland: A simulation study.’ *Regional Environmental Change*, Volume 7, Issue 3, 161–172.

Taylor & Ortiz. (2009). ‘Impact of climate change on domestic tourism in the UK: a panel data estimation.’ *Tourism Economics*, Vol 15, Issue 4.

Salmon, A., L. Arnesson, A. Sörensson & G. Shukur. (2010) ‘Estimating International Tourism Demand for Selected Regions in Sweden and Norway with Iterative Seemingly Unrelated Regressions (ISUR).’ *Scandinavian Journal of Hospitality and Tourism* 10:4, 395–410.

Gozgor, G. & Ongan, S. (2017). ‘Economic policy uncertainty and tourism demand: Empirical evidence from the USA.’ *International Journal of Tourism Research*, 19(1), 99–106. doi:10.1002/jtr.2089

Southall, C. (2012) ‘UK Family Tourism: Past, Present and Future Challenges.’ In *Family Tourism, Multidisciplinary Perspectives* by Heike Schanzel, Ian Yeoman & Elisa Backer, Aspects of Tourism, Channel View Publications.

Additional relevant articles from Pike & Page (2014) were reviewed to check that the search criteria would capture most of these.

A.3. Additional online searches

Google Scholar

The following search terms were used in the advanced search interface.

| | |
|---------------------------------|---|
| With all of the words: | Marketing |
| site:.xx | separate search for each: .uk, .de, .ch, .nl, .es, .dk |
| With at least one of the words: | ‘domestic travel’, ‘domestic destination’, ‘domestic leisure’, ‘domestic tourism’, ‘domestic tourist’ |
| Words occur: | anywhere in the article |
| Return articles dated between: | 2015–2020 |

Google searches

Additional searches were also implemented directly in Google, limited to articles published in or after 2010:

- Domestic tourism evaluation;
- Tourism campaign evaluation;
- Social media destination marketing;
- Domestic tourism marketing;
- Local tourism campaign.

The main organizational websites visited directly are shown below.

| | |
|----------------------------------|---|
| OECD | http://www.oecd.org/general/searchresults?q=domestic%20tourism&cx=012432601748511391518:xzeadub0b0a&cof=FORID:11&ie=UTF-8 |
| VisitEngland | https://www.visitengland.com/ |
| VisitScotland | https://www.visitscotland.com/ |
| Wales Tourism Alliance | https://www.wta.org.uk/ |
| European Travel Commission | https://etc-corporate.org/publications/ |
| European Tourism Association | https://www.etoa.org/ |
| National Coastal Tourism Academy | https://coastaltourismacademy.co.uk/resource-hub/resource/coastal-tourism-2015 |

Further to this, we contacted the following organisations directly:

| | |
|--|---|
| Visit Denmark | https://www.visitdenmark.com/ |
| NBTC Holland Marketing | https://www.nbtc.nl/en/homepage.htm |
| Innovation Norway | https://www.visitnorway.com/ |
| Turespaña - Instituto De Turismo (Spain) | https://www.spain.info/ |
| Switzerland Tourism | http://www.myswitzerland.com/ |
| German National Tourist Board | https://www.germany.travel/en/index.html |
| Visit Sweden | https://visitsweden.com/ |
| Dansk Kyst & Natut Turisme (Denmark) | https://www.kystognaturturisme.dk/forside/ |
| Visit Stockholm | https://www.visitstockholm.com/ |
| Swedish Tourist Association | https://www.swedishtouristassociation.com/discover/ |

Annex B. Summary of outputs from search on factors

Table B.8 Extraction table for evidence on factors influencing domestic tourism

| Authors /date | Location | Study period | Method | Factor |
|----------------------------|----------|--------------|--|---|
| Álvarez-Díaz et al. (2017) | Spain | 2016 | An origin-destination matrix is constructed, using data from the FAMILITUR household panel survey. Pairwise coefficients are calculated to show the relative level of tourist attraction of each region. A spatial autoregressive (SAR) and a gravity model are developed to analyse the determinants of domestic tourism flows. | <p>Economic</p> <ul style="list-style-type: none"> • High destination prices are negatively associated with inter-regional tourism flows. The magnitude of -4.343 indicates high price elasticity. • GDP per capita positively influences trips. A coefficient of 1.20 implies that, should income increase by 1%, individuals would make 1.2% more inter-regional trips. Destination GDP per capita acts as a proxy for quality of public services and social institutions, demonstrating the importance of economic development in attracting domestic tourists. <p>Destination attributes</p> <ul style="list-style-type: none"> • Each additional km separating two regions reduces the number of trips by 0.003%. • More museums, theme parks and natural parks attract more domestic tourists. • Higher quality of beaches also attracts more domestic tourists. <p>Other</p> <ul style="list-style-type: none"> • More airports at both origin and destination is associated with increased domestic tourism. • Residents of islands off the mainland of Spain are more likely to make trips within their own region compared to people living on the mainland. • Island destinations, independent of other effects, are associated with more inbound domestic tourism. The opposite is found for the two autonomous cities in Spain – Ceuta and Melilla. |

Factors influencing domestic tourism and the role of publicly funded marketing

| Authors /date | Location | Study period | Method | Factor |
|------------------------|----------|--------------|--|--|
| Massidda & Etzo (2012) | Italy | 2004 to 2007 | The study uses a panel dataset of 380 individuals, recording their trips between the 20 main Italian regions. An extended gravity model was estimated. The analysis is conducted at both an aggregate level, as well as looking at the North–South geographical divide within the country. | <p>Economic</p> <ul style="list-style-type: none"> Individuals from regions with high GDP per capita take more domestic trips, with demand elasticity of 1.4274. Authors note this is higher than what much of the literature finds, and suggests tourism behaves as a luxury good. High relative prices negatively impact domestic tourism. At -8.9784, it has the largest magnitude of any other factor suggesting a high degree of price sensitivity. Southern tourists are found to be four times more income sensitive than Northern ones. Income elasticity for domestic tourism demand may decline when income increases because people demand holidays abroad. <p>Destination attributes</p> <ul style="list-style-type: none"> If a destination has a higher proportion of public expenditure on cultural initiatives, then this attracts more domestic tourists (0.1190). The variable ‘places’ used as a proxy for the number of tourist attractions in an area has a very weak effect on domestic tourism flows, perhaps surprisingly. This surprising result may be because ‘places’ is a poor proxy. Higher crime levels deter domestic tourism. A densely populated area attracts more domestic tourism. Higher distance between two locations is associated with less trips being made. This incorporates both the monetary cost (further away generally means more expensive cost of travel) and the non-monetary costs (e.g. time taken to travel there). The magnitude of -0.0762 is smaller than what the international tourism literature finds. <p>Other</p> <ul style="list-style-type: none"> A variable representing high CO₂ emissions at destination has a coefficient of -0.9452, suggesting that domestic tourists dislike making trips to areas that are more CO₂-intensive. The kilometres of road infrastructure act as a pull factor for domestic tourism, though at 0.0450, it is a fairly small impact. Tourists from highly population-dense areas take more domestic trips (0.7116). The lagged dependent variable (indicating whether someone has made a trip to that destination before) has an elasticity of 0.7976, meaning many Italian tourists like to return to the same region as they did the year before for a domestic trip. The authors find this to be of high magnitude, but of the right sign compared to the literature. The authors find a negative relationship between international trips and domestic trips, suggesting they are substitutes. |
| Taylor & Ortiz (2009) | UK | 1998 to 2004 | Using data from the Met Office and the UK Tourism Survey, a linear static model and a | <p>Environment</p> <p><u>Linear static model results:</u></p> |

| Authors /date | Location | Study period | Method | Factor |
|--|--------------------|--------------|--|---|
| | | | <p>dynamic model (incorporating time effects) are estimated. The dynamic model enables the inclusion of lagged levels of the dependent variable as well as time period differences in the independent variables.</p> | <ul style="list-style-type: none"> Temperature and sunshine hours are shown to be significant determinants of number of trips. However, the coefficients are very small (0.0146 and 0.0010, respectively). ‘A 1°C increase in average monthly temperature is associated with an increase of 14,600 trips in that month, while one extra sunny hour leads to 1,500 extra trips.’ For bed nights, the coefficients are also positive. The effect of temperature on expenditure is only significant at the 10% level, but sunshine hours has an effect of 0.1895 on expenditure. The dummy variable for Summer is also significant and has a much larger magnitude at 0.1467 for trips, 0.4517 for bed nights and 26.330 for expenditures. <p><u>Dynamic model results:</u></p> <ul style="list-style-type: none"> Similar results. The specific variable for the summer heatwave in 2003 is positive for trips, bed nights and expenditure, all at 1% level. Conclusion: ‘The implications of this study are that there is likely to be increased domestic tourism as a result of climate change, as the results of climate models suggest hotter summers for the UK.’ <p>Economic</p> <ul style="list-style-type: none"> Linear static model results: Real income is significant for trips and expenditure. It is insignificant for bed nights. The exchange rate (used as a proxy for prices abroad) is significant at 1% level and is 1.0365 for trips, 2.7704 for bed nights and 180.71 for expenditure. Dynamic model results: Similar results, except that income is now found to have a negative impact on trips, expenditure (only 5% significant) and bed nights. This is not expected, though the addition of a lagged dependent variable may cause this. <p>Other</p> <ul style="list-style-type: none"> The authors speculate the impact of good weather on domestic holiday demand may be magnified by the ‘expansion of Internet companies offering last minute deals’. |
| <p>Bronner & de Hoog (2013)</p> | <p>Netherlands</p> | <p>2009</p> | <p>Survey of Dutch holidaymakers who economised on their holiday after the financial crisis. Sample is weighted to ensure it is representative of the Dutch population. Descriptive statistics</p> | <p>Economic</p> <ul style="list-style-type: none"> Out of the ten methods of economising on a holiday that were surveyed, changing destination is the most popular. <p>Other</p> <ul style="list-style-type: none"> Changing destination was the economising method that involved the highest number of information source formats being considered (0.45). |

| Authors /date | Location | Study period | Method | Factor |
|-----------------------------------|----------|--------------|--|--|
| | | | performed on the survey responses. | <ul style="list-style-type: none"> Electronic word of mouth (consumer travel content) and travel guides were the information sources most used when people decided to change their destination. Marketer-generated websites and advertising were the least used information sources when it came to people deciding to change their destination. |
| Caletrio (2012) | UK | 2008 to 2010 | Data was 'gathered through 70 in-depth interviews and 510 questionnaires during the months of July and August in 2008, 2009 and 2010.' Qualitative assessments of interview content is the main method used. | <p>Environment</p> <ul style="list-style-type: none"> 'A key finding is that a quarter of the respondents expressed their willingness to spend their holidays closer to home in order to reduce carbon emissions.' However, it must be noted that many of the respondents added conditions onto this. Less than 1% of respondents were climate-change deniers, but there was a great deal of uncertainty of its severity and how much was due to human activity. Many respondents felt there is no immediate concern from the effects of climate change, so no urgent reason to adapt travelling behaviour. 'What is then, they argued, the need for such strict measures or less exotic tourism when considered against the huge personal and cultural benefits of travel?' Other respondents said action is required, but that it should have happened a long time ago and that 'travel for holidays should figure as one of the last and least negotiable issues.' 'Interviewees often described themselves as minute ants in a vast and turbulent world, a grain of sand in an ever-growing desert. A feeling that global warming would still happen no matter how much they reduced their consumption pervaded their accounts. This again was another way of questioning the need for simpler, low-carbon holidays.' <p>Other</p> <ul style="list-style-type: none"> Some people were not prepared to give up holidays abroad because their normal everyday lives in the UK were low-carbon, so felt a small holiday abroad was justified. Some respondents referred to holidays abroad as a 'non-negotiable element of their lifestyles'. Respondents eagerly defended holidays/travel as a 'basic citizenship right with unequivocal educational and civilisational effects'. Strategies to reduce emissions should focus on the home and work, but not include leisure travel. Indiscriminately promoting low-carbon holiday creates issues of inequality and social justice since it would 'penalise the less wealthy while the rich and super-rich would always find ways to bypass restrictions.' 'Interviewees' responses reflect the high symbolic and personal value holidays have in contemporary societies in the rich North.' |
| Davison & Ryley (2016) | UK | 2009 to 2010 | Mixed methods approach employed. Data collected via a household survey and interviews with family groups of holiday- | Destination attributes |

| Authors /date | Location | Study period | Method | Factor |
|---------------|----------|--------------|--|---|
| | | | <p>makers in the East Midlands. ‘A combination of stratified-random and clustered sampling was used to attain a response from a range of different areas and sub areas.’ Regression models performed to analyse the influence of holiday preferences on destination choice (sub-categorised into UK, rest of Europe or outside of Europe) for their main holiday. Respondents were also asked to give their main reason for holiday destination by destination category.</p> | <ul style="list-style-type: none"> • The factor with the second biggest magnitude of selecting a European destination for a holiday as opposed to a UK destination is getting to visit a new destination rather than returning to one that they’ve been to before (-0.77, $p < .01$). For choosing a holiday outside of Europe, this factor had the biggest coefficient (-1.2, $p < 0.01$). • The UK was a popular destination choice amongst those who selected ‘Returning to somewhere enjoyable’ as a main reason for destination choice. The UK ‘allows holidaymakers to return to destinations they had enjoyed previously, emphasising how nostalgia influences choices, particularly when taking a domestic holiday.’ Interviews with couples with children revealed a ‘desire to return to holiday destinations they visited as children, perpetuating an idea of a childhood holiday.’ • Amongst those who selected ‘visiting a new location’ or ‘beauty or cultural heritage’ or ‘Activities available at destination’ as a main reason for destination choice, there was no significant difference amongst the destination selected, ‘which highlights a level of tradability between destinations in fulfilling holiday demands.’ <p>Socio-demographics</p> <ul style="list-style-type: none"> • ‘Households with children are most likely to holiday in the United Kingdom, whereas respondents living with friends are proportionately more likely to holiday outside of Europe.’ ‘Having children is often a precursor for substituting international holidays for domestic ones.’ • Respondents looking after their home and family tend to take more holidays in the UK whereas those in education tend to travel abroad, ‘suggesting a life stage effect upon destination choice.’ • Those aged 18–34 ‘are most likely to travel outside of Europe whilst those aged between 35 and 44 are only exceeded by respondents aged over 75 as consumers of domestic tourism.’ • Income was found to have a non-linear effect. ‘Respondents earning under £20,000 are most likely to take their main holiday in the United Kingdom, but conversely a domestic main holiday is also a popular choice for [a] sub-segment of respondents in the highest income band.’ But respondents in higher income brackets take considerably more holidays abroad compared to those on lower incomes. <p>Other</p> <ul style="list-style-type: none"> • Another reason people holiday abroad rather than in the UK is to visit friends and family (for Europe, -0.26, $p < 0.05$; for outside Europe, -0.58, $p < 0.01$). • An interesting statement posed to respondents was ‘My lifestyle makes it difficult for me to stop flying.’ People who answered yes were significantly ($p < 0.01$) more likely to holiday in Europe as opposed to the UK. But this was not significant when choosing to holiday outside of Europe. |

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| | | | | <ul style="list-style-type: none"> • Fear of flying, hassle of flying and the need to fly frequently for business purposes were all cited as reasons for preferring to holiday domestically. • The largest magnitude coefficient for choosing to holiday in Europe as opposed to the UK is the weather (-0.8, $p < 0.01$). It is not the largest in terms of magnitude for choosing to holiday outside Europe vs the UK, but it is still significant (-0.59, $p < 0.01$). • However, a significant reason ($p < 0.01$) for choosing the UK instead of anywhere else was 'trying to fly less for environmental reasons.' • 'Respondents are motivated to holiday in the rest of Europe and outside Europe because of the climate.' Out of a total of 68 people who selected 'climate' as the main reason for choosing a holiday destination, only 1 of those holidayed in the UK, the other 67 holidayed abroad. • Though it was significant, overall, 'Environmental concerns have a limited impact upon destination choice, although tourists do consider the 'environment' at the destination, with climate and 'the weather' being of particular importance to international holiday makers.' • Being able to find better value holidays abroad as opposed to the UK was also a significant reason ($p < 0.01$) people chose to holiday abroad rather than in the UK. • However, the current economic situation was found to be a significant reason for choosing to holiday in the UK rather than abroad ($p < 0.01$). • 'Economic factors do play a part in determining the United Kingdom as the main tourism destination for households with lower incomes, but domestic holidays are also popular with households at the other end of the income spectrum. Those on the highest incomes tend to take more holidays, many of which are to domestic locations.' |
| Pang (2014) | Australia | 2011 to 2012 | 'In this study, the dependent variable is whether the respondent took a domestic overnight trip. A total of 179,791 respondents were interviewed between January 2011 and June 2012.' The main data analysed is from the Australian National Visitor Survey. | <p>Socio-demographics The following are ordered in terms of maximum impact:</p> <ul style="list-style-type: none"> • 'Household income is the most important category in terms of maximum impact for the decision to take domestic overnight travel.' The higher the income, the more likely a respondent is to have taken a domestic overnight trip. A respondent in the income bracket > AUD 200,000 was found to have a 190% higher probability of taking a domestic trip compared to < AUD 9,999. • Country of birth is also found to be important. Those born in Australia have a higher probability of opting for an overnight domestic trip compared to those born in either South Africa, Asia or the Middle East. The coefficients for those born in New Zealand, America and Europe were found to be insignificant. |

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| | | | A new method of impact analysis is developed, restricting the probability of taking an overnight trip to be between 0 and 1, improving on the limitations of the traditionally used linear probability model. Using expected probabilities, the model estimates the additional expected probability each explanatory variable has on a respondent's decision to take an overnight domestic trip or not. | <ul style="list-style-type: none"> Life cycle stage is also important. Many levels were found to be insignificant, but of those found to be significant, 'young single people living at home have the lowest probability (a value of 0.176) while older nonworking married residents show the highest probability (0.286), 62.5% higher than the young single people living at home. The analysis also shows that older life-cycle stage groups, whether married or single, always having a higher probability than those in other life-cycle stage groups.' 'Employment is also significant in the model, but its maximum impact is 0.06, which is small compared to the above categories...such as household income, country of birth or life-cycle stage.' 'Residents who are retired, unemployed or mainly occupied with home responsibilities always show lower probability than residents who are working or studying.' The variables for the age cohorts are all insignificant except for 55–69 and >70. 55–69 have a probability of opting for domestic overnight travel of 0.26, but for >70 years it drops to 0.213. <p>Economic</p> <ul style="list-style-type: none"> 'A negative linear relationship exists between change in the automotive fuel price and the probability of tourists opting for domestic overnight travel.' However, the maximum impact value of 0.04 is quite small compared to other variables. 'Our analysis demonstrates that its influence on the domestic overnight trip decision is not as great as might be expected.' Which agrees with much of the literature. Domestic airfare has an even smaller impact of just 0.01. 'A negative linear relationship is observed between a change in the domestic airfare and the probability of tourists opting for domestic overnight travel.' |
| Stylidis et al. (2017) | Israel | 2010 | Questionnaire designed to investigate the cognitive, affective and overall image of Eilat, Israel as a tourist destination; tourists' perceived quality and satisfaction; and their behavioural intentions. A final sample of 240 usable questionnaires was analysed. A confirmatory factor analysis 'of the measurement model using the maximum likelihood estimation method was | <p>Destination attributes</p> <ul style="list-style-type: none"> The paper includes a literature review on how destination image influences destination choices, however, very little relates to domestic tourism. Domestic tourists held a favourable (mean score >5) image of Eilat's beaches, restaurants, hotel quality, shopping and friendliness of people. They were neutral about Eilat having interesting festivals. The researchers found the overall destination image to exert a positive influence on perceived quality and satisfaction. Perceived quality was found to influence satisfaction of visit, creating evidence of the following relationship: destination image → perceived quality → satisfaction. The literature is not unanimous on how these variables interact with one another. |

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| | | | performed first' and testing of the structural relationships in the models were then used to analyse the data using an integrated path model with structural equation modelling. | <ul style="list-style-type: none"> • 'Lastly, overall destination image, perceived quality and satisfaction, as hypothesized, all had a positive effect on behavioural intentions.' This is in line with previous findings in the literature. The study includes recommending to others, and intention to return as components of behavioural intentions. • The destination image's role 'in domestic tourism is not limited to the destination selection process, but it appears to also influence domestic tourists' on-site experience as well as their future behaviour in relation to the destination.' • 'Results revealed that a positive destination image leads to higher perceived quality and satisfaction. Therefore, a strong and distinctive overall image is directly related to the success of a tourist destination.' 'Apart from improving tangible aspects of the destination, such as infrastructure and attractions, it was revealed that in the case of domestic tourists, the affective evaluation is more important in shaping their overall image of the destination.' 'The affective component of image should thus be more actively used for positioning Eilat in the domestic tourism market. In particular, marketing of Eilat to domestic tourists in Israel should emphasize Eilat's relaxing, pleasant and lively atmosphere.' • The attitudes of local residents can be very important in influencing perceptions of a place and visitors' intention to return (destination loyalty). Having locals that are friendly and informative can make a big difference. |
| Molinillo & Japutra (2017) | Spain | 2013 | A survey of 4,223 residents of Andalusia, Spain. Participants were asked if they had visited a cultural attraction (ballets, book fairs, concerts, historic sites, museums, music festivals, natural parks, operas, theatres and zoos) outside their hometown in the past year. Cluster analysis and multinomial logistic regression was performed to analyse results. Three clusters were formed. Cluster 1: popular attractions (Visitors to historic sites, popular attractions, natural parks, book fairs, museums & zoos); Cluster 2: musical attractions (music festivals and concerts); and | <p>Socio-demographics <u>Popular attractions (cluster 1):</u></p> <ul style="list-style-type: none"> • Men found to be 1.2 more times likely to attend compared to women. • 'People who are single, married, cohabiting, or divorced were 0.6 times more likely to attend cultural attractions in Cluster 1 than widows and widowers.' Married people the most likely (0.647). This may be because these attractions tend to be visited by families with children. • Age insignificant. • The lower the education level, the more likely people were to have attended a popular attraction, with the highest level (university degree) being the least likely. • 'The results show that people who earned €900/month or less were 2.3 times more likely to attend attractions in this cluster than people earning €3,001/month or more' The other two income brackets were found to be insignificant. • 'People living in smaller cities were more likely to attend cultural attractions in Cluster 1 than people living in bigger cities. The results show that residents of cities with populations of 10,000 or less, 10,001 to 20,000 and 20,001 to 50,000 were respectively 1.8, 1.7 and 1.6 times more likely to attend attractions in Cluster 1 than residents of cities with populations of 100,001 or more.' This was highly significant (p<0.001). |

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| | | | Cluster 3: classical attractions (ballet, opera and theatre). | <p><u>Musical attractions:</u></p> <ul style="list-style-type: none"> Income, population size and gender all insignificant. Younger people (under 55) more likely to attend. Marital status: 'single people were 0.2 times and people who were cohabiting or are divorced were each 0.3 times more likely to attend attractions in Cluster 2 than widows and widowers.' The lower the education level, the more likely people were to have attended a musical attraction. <p><u>Classical attractions:</u></p> <ul style="list-style-type: none"> Males 1.7 times more likely to attend compared to females Younger people more likely to attend. <35 are 4.9 times more likely to attend than >54. This is not usually the case, however the authors offer possible explanations in that younger people are more educated than previous generations. The lower the education level, the more likely people were to have attended a classical attraction. This goes against much of the 'classical sociology literature.' However, the authors note that a very high proportion of the region have only completed secondary education. The lower the income level, the more likely to have attended a classical attraction. A strange finding, considering that according to the literature, classical attractions have traditionally been associated with high culture. People living in smaller cities more likely to have attended. <p><u>Conclusion:</u></p> <ul style="list-style-type: none"> 'Generally speaking, it can be said that men, younger people, people with lower cultural and income levels, people who support government funding of cultural attractions, and residents of cities with populations of less than 50,000 are more likely to attend cultural attractions.' Males more likely to attend popular and classical attractions than women. 'This stands in contrast to previous studies that emphasized women's attendance at classical attractions'. However, some other research supports this finding. Widowhood has a strong negative impact on participation in cultural activities. Lower income residents being more likely to attend cultural attractions goes against much of the literature. Explanations include having more free time (lower income likely means more unemployment) and that attractions are more financially accessible than they used to be. Specific characteristics of the region/sample may explain these anomalies. Local effects due to population demographics, GDP, etc. could explain some of the findings. |

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| Prebensen & Tkaczynski (2012) | Norway | 2009 | '1,201 Norwegian residents who exhibit an interest in nature-based vacations in Norway participated in an online questionnaire and were segmented using two-step cluster analysis.' Respondents were clustered into four groups based on the type of activity they most prefer and their characteristics. | <p>Socio-demographics</p> <p><u>Cluster 1 – Active youngsters</u></p> <ul style="list-style-type: none"> • 'Young age, current employment status as students and their focus on highly active sports.' • 'The majority of cluster one is aged under 25 (85.2%).' • Most 'list secondary school (54.8%) as their highest level of completed education.' • 75% are students. • Over a third (most popular answer) 'would spend less than 5,000 NOK on a trip in Norway.' • Most live with their parents. • 'The group size and household size are approximately three and four, respectively, and length of stay is about a week for this first cluster.' <p><u>Cluster 2 – Single nature explorers</u></p> <ul style="list-style-type: none"> • 'This segment is distinguished by its lower household income and single marital status.' • Middle aged (40–59). • 33% have an undergrad degree. • 66% are employed full-time. • Most common trip expenditure is 5,000–9,999 NOK. • This group has the smallest household income (average=mode) of 200,000–399,999 NOK. • 'The group and household size is roughly one and a half and their length of stay would be 9.5 days.' <p><u>Cluster 3 – High scaled active couples</u></p> <ul style="list-style-type: none"> • 'The key distinguishing features of this cluster is their preference for outdoor activities, are employed full-time, and have higher than average household income.' They are also most likely to be married and are slightly younger than cluster 4. • 'Predominantly aged between 25 and 59 (99.4%).' • 'Are highly educated with a university degree (71.4%).' • 'Are employed full-time (80.4%).' • 'Would travel throughout Norway by car (80.3%).' • 'Over half of this cluster's respondents (51.3%) earn over 800,000 NOKs annually.' • 'Would spend between 5,000 and 14,999 NOK on a Norwegian vacation.' • 'Their group and household size are approximately three and their proposed length of stay is almost 8 days.' |

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| | | | | <p><u>Cluster 4 – Retired nature and culture seekers</u></p> <ul style="list-style-type: none"> • ‘This group is distinguished based on their elderly age, nonworking status, and preference for cultural-based activities.’ • ‘Cluster four respondents are elderly (95.5%).’ • ‘Post-secondary school educated (64.3%).’ • ‘Largely retired or not working (62.1%).’ • ‘Travel by car (70.5%).’ • ‘Predominantly married (97.8%).’ • 20% earn 400,000–599,999 NOK. • ‘Roughly a half would spend between 5,000 and 14,999 NOK on a domestic nature-based vacation.’ • ‘The group and household size is roughly two and the segment would stay for 1.5 weeks.’ <p>Destination attributes</p> <p><u>Cluster 1 - Active youngsters</u></p> <ul style="list-style-type: none"> • Like to ‘Experience the mountains and the wilderness’ the most. • Followed (in order) by ‘Walking long trips in nature’, experiencing the fjords, experiencing the northern lights, experiencing the midnight sun, skiing and snowboarding, and extreme sports. • ‘These Norwegians prefer physically challenging options such as “alpine skiing or snowboarding” and “winter activities without ski” much more highly than the other three segments.’ <p><u>Cluster 2 - Single nature explorers</u></p> <ul style="list-style-type: none"> • Also like active outdoors things, like the first cluster. • ‘Appreciates cultural activities, the coast and coastal experiences, in addition to nature-based phenomena such as the midnight sun and the northern lights, somewhat more than the third cluster.’ <p><u>Cluster 4 - Retired nature and culture seekers</u></p> <ul style="list-style-type: none"> • More frequently go on cruises, visit cultural/historical places and taste local food and drink more than other groups. |
| <p>Yap & Allen (2011)</p> | <p>Australia</p> | <p>1999 to 2007</p> | <p>A three-stage least squares (3SLS) regression model is estimated using panel data covering quarter one of 1999 to quarter four of 2007, a total of 36 observations.</p> | <p>Economic</p> <ul style="list-style-type: none"> • CSI (Consumer Sentiment Index) – a measure of consumer expectations about the economy – is found to be significant for VFR but not for holidaymakers. The equivalent BCI (business confidence index) is not significant for business stays. • Household debt has an elasticity of 2.39 on holidays and 2.9 on VFR, implying that rising debt levels do not reduce demand for trips. In fact, the authors propose the explanation that more debt may be used to finance domestic trips. |

Factors influencing domestic tourism and the role of publicly funded marketing

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| | | | | <p>'Household debt has no significant effect on business visitors. The result seems reasonable because most of the business trips are funded by companies and hence, household debt may not have strong influence on business visitors' decisions to travel.'</p> <ul style="list-style-type: none"> Working hours are insignificant for business travel and VFR, but significant for holidays. However, the sign is positive, indicating that longer hours are associated with more domestic holidays, going against the authors' hypothesis. A possible explanation is that technological improvements may allow people to work whilst on holiday (laptops, mobile phones, etc.). As domestic tourism prices increase, the demand for domestic travel – both holidays and VFR – falls. Higher GDP is associated with increased domestic business trips. As disposable income increases, demand for domestic VFR holidays decreases. Again, this goes against the hypothesis. The authors suggest it may be because in this case 'Australians would tend to forego domestic trips and choose to travel overseas.' |
| Canavan (2013) | Isle of Man | 2010 to 2011 | 21 'In-depth interviews are conducted with Isle of Man residents, in order to explore the extent, type, and motivations for local domestic tourism.' | <p>Other</p> <ul style="list-style-type: none"> Reasons for engaging in domestic tourism include: Communality, social experiences, romance, 'Escapism from habit and routine', entertainment and relaxation, desire to explore and to 'experience the wildlife and inaccessible landscapes of the island.' Flexibility of being able to postpone or spontaneously go at a moment's notice was also cited. 'Because of living locally, residents may decide to postpone a planned trip when the weather is poor, or on the spur of the moment decide to go out if it is sunny.' Similarly, people want to make domestic trips due to the destination being 'a place of novelty, interaction, and learning rather than a function through which needs, such as escapism, can be satisfied.' 'Interviewees described a need to entertain others as well as themselves, such as children or overseas guests.' 'Social opportunities motivated many to stay overnight.' Wanting to explore, as well as relax and escapism were all mentioned as well. |
| Hyllemose (2012) | Denmark | 2015 | Survey issued in person at a tourism fair, and via author's personal network. Generated 283 usable responses. Cluster analysis used to identify groups of people who have similar criteria for selecting a holiday destination: | <p>Socio-demographics <u>The domestic vacationers</u></p> <ul style="list-style-type: none"> The average age is 43.3. 63% male (high considering only 41% of entire sample is male). 62% have children who always or sometimes go on holiday with them. Most likely to be families. |

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| | | | <p>The domestic vacationers, the international vacationers and the doubters.</p> | <ul style="list-style-type: none"> This cluster has the lowest annual income. ‘34% earn between 150,000–250,000 DKK, a much larger percentage than both the international vacationers (12%) and the doubters (14%).’ Only 10% ‘have an annual household income of >700,000 DKK, for the international vacationers this number is 27% and the doubters 22%.’ The least educated. <p><u>International vacationers</u></p> <ul style="list-style-type: none"> Oldest group (46 years). 69% female. 78% do not have children who go on holiday with them. <p><u>Doubters</u></p> <ul style="list-style-type: none"> 42.5, the youngest. 58% have children who always or sometimes go on holiday with them. The highest educated. <p>Destination Attributes</p> <ul style="list-style-type: none"> ‘When asked about their preferred vacation types, 28% of the respondents stated that one of their preferences is to go on a summerhouse vacation in Denmark. For a vacation in a hotel, inn, etc. in Denmark that number is 24%.’ So there is evidence of holidaying in Denmark being viewed positively, but there were three options involving travel abroad that were more popular (Charter holiday, 36%; longer trips outside Europe, 49% and big city holiday, 55%). ‘22% of the respondents agree or strongly agree with the statement ‘only a vacation outside Denmark is a real vacation for me.’ ‘In spite of this overall positivity towards going on vacation in Denmark, 57% would prefer to travel outside Denmark when they go on vacation, and 65% prefer to go somewhere they know the weather will be good’. <p>Other</p> <ul style="list-style-type: none"> The most significant influence in the model is attitude towards going on holiday in Denmark, with a standardised regression weight of 0.667. A positive attitude towards Denmark and domestic holidaying is positively associated with intention to do so. Subjective norms are shown in the model to have an interesting role. The direct impact on intention to holiday in Denmark was found to be insignificant. But, it is shown to minimise the negative effect of ‘constraining’ factors of vacationing in Denmark (bad weather; preferring to holiday outside Denmark for vacations; a real vacation means going abroad). |

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| | | | | <ul style="list-style-type: none"> • Social norms include: listening to recommendations from friends and family; being inspired to choose vacation destinations by social media posts from friends and family; and it being important that friends and family like the vacation destination you choose. It indirectly affects intention to go on holiday in Denmark, by reducing the impact of significant constraining factors. This is a relatively new finding. • Other constraining factors that have a negative influence on attitudes towards holidaying in Denmark include people who prefer to travel outside Denmark when they holiday and those who believe a vacation is only a proper vacation if it is somewhere abroad. • ‘One approach to branding Denmark as an attractive vacation destination for the Danes, however, could be to focus on exploiting the positive view of or attitude towards going on vacation in Denmark, which many Danes already have.’ |

Annex C. Summary of outputs from search on publicly funded marketing

Table C.9 Extraction table for evidence on influence of publicly funded campaigns

| Authors /date | Location | Study period | Study aims | Method | Key findings |
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| Pike & Page (2014) | N/A | N/A | To review the existing literature on destination marketing and destination marketing research. | A comprehensive narrative review is undertaken. | <p>Approaches to measuring destination marketing impact:</p> <ul style="list-style-type: none"> • Research into destination marketing has typically taken the form of either visitor metrics or conversion studies. • Both visitor metrics and conversion studies offer a degree of accountability for return on investment. At the same time, however, both approaches are restricted in their ability to account for the role of extraneous variables (factors other than marketing) in the destination choice. • A third approach to measuring the impact of destination marketing has been branding performance, including the broader marketing research concept of consumer-based brand equity (CBBE). CBBE uses consumer perceptions of a brand as a means to measure marketing performance. In doing so, it draws upon a hierarchy of effects model of advertising effectiveness comprising constructs such as ‘brand salience’ (the strength of the brand’s presence in the mind of the target), ‘brand associations’ (the attitudes and perceptions towards the brand) and ‘brand loyalty’ (the intent to purchase the brand and make word of mouth referrals). • The use of CBBE to measure the influence of destination marketing is also beset by challenges. For one, ‘the extent to which consumers use an overall or |

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| | | | | | <p>composite image’ of destinations ‘is not yet understood.’ While individual components of a destination’s image may fluctuate greatly over time, their effect on overall brand image of the destination may not be influential.</p> <p>Destination branding</p> <ul style="list-style-type: none"> • Destination marketing research has identified three key elements in the branding process: brand identity (the image aspired to in the marketplace for the brand); brand image (the actual image of the brand held by consumers); and brand positioning (marketing communication attempts to achieve congruence between the brand identity and brand image). • Applying concepts such as brand identity to the large and complex entity of destinations is not a simple process. Challenges include: engaging the host community in the brand identity development; agreeing on a focused direction with a diverse and eclectic range of active stakeholders; and harnessing cooperation in supporting the brand positioning efforts required to communicate brand identity. |
| Pratt, McCabe, Cortes-Jimenez, & Blake (2010) | UK | 2004 to 2010 | To measure the impact of 18 domestic tourist-focused destination marketing campaigns across five DMOs in the East Midlands region. | The conversion method is used. The sampling frame for the conversion study consists of contacts who previously requested information from DMOs. For each of the 18 campaigns, a random sample of contacts is surveyed. The results of the survey are used to calculate gross and net conversion rates, incremental expenditure and return on investment. A correlation analysis is performed using the Pearson correlation coefficient. | <p>Conversion rates</p> <ul style="list-style-type: none"> • Across 18 domestic tourism marketing campaigns, the average gross and net conversion rates were 43% and 18% respectively. The average discrepancy between gross and net conversion rates was 24%. <p>Incremental expenditure</p> <ul style="list-style-type: none"> • Incremental expenditure (calculated as the additional revenue generated by (i) those who are converted to the destination as a direct result of the campaign (visitors); and (ii) those who extended their stay in the destination as a direct result of campaign (extenders)) varied considerably across the campaigns, from £22,584 to £12,116,573. • The split between expenditure generated by visitors and expenditure generated by extenders was 85% to 15% on average. <p>Return on investment</p> <ul style="list-style-type: none"> • Return on investment (calculated as the incremental expenditure generated by the campaign divided by the campaign costs) averaged 10:1. Here again, however, there was considerable variation across campaigns. Six campaigns returned more than 15:1 return, while six others returned less than 2:1. <p>Cost effectiveness</p> |

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| | | | | | <ul style="list-style-type: none"> Across the 18 campaigns, the average cost per visitor (calculated as the gross conversation rate applied to the total number of contacts) was £81.80. The average cost per converted visitor was £209.40. The median cost per visitor (deemed more appropriate due to the skewing of averages by one large campaign) was £25.70. The median cost per converted visitor was £55.50. <p>Campaign type</p> <ul style="list-style-type: none"> Generic marketing campaigns performed significantly better than the niche marketing campaigns across a range of measurements, including total expenditure, revenue per inquiry, and return on investment. The cost of the campaign was also positively correlated with return on investment. |
| Steinmetz, Park, & Fesenmaier (2016) | US | 2010 to 2011 | To explore the merits of a ‘facets-based’ approach to destination marketing, which considers the impact of marketing on a range of different decisions relating to the trip. | <p>An online survey is used to gather information on traveller responses to destination marketing. The sampling frame consisted of American travellers who had requested travel-related information from five different state administrations and regional tourism offices.</p> <p>Frequency analysis is conducted to analyse the key variables by the tourism advertising campaign. Multivariable regression analysis is then used to analyse the relationship between visitor expenditure and decisions to visit, attend or purchase ‘products’ included in the marketing literature.</p> | <p>The impact of tourism marketing on travel decisions</p> <ul style="list-style-type: none"> 14.7% of respondents were influenced to visit the destination by marketing. By comparison, 58.4% of the respondents were influenced to visit a featured attraction by destination marketing. 48.4% were influenced to visit advertised restaurants. 37.8% of respondents were influenced to attend a featured event. <p>Traveller expenditure</p> <ul style="list-style-type: none"> Advertisements that influenced travellers to visit featured attractions, restaurants and hotels had a significant positive impact on visitor spending. Advertisements that influenced destination choice, trips to special events, shopping trips and trips to visitor centres were not statistically linked to increases in visitor expenditure. <p>The impact of trip and traveller characteristics on visitor expenditure</p> <ul style="list-style-type: none"> Trip type had a ‘significant impact on total visitor expenditure.’ Day trips, trips of only one night, and visits to family and friends had a negative impact on traveller expenditure. ‘Weekend getaways’ were linked to increased visitor spending. Traveller characteristics also significantly impacted visitor expenditure. Travellers visiting a destination for the first or second time spent more on average. Visitor spending also increased with the size of the travel party. Travellers using destination websites typically spent significantly less than the average visitor. |
| McCabe & Branco | UK | 2015 | To explore the ways in which UK tourists | Five focus groups comprising a total of 36 people are used. | Deal proneness and value consciousness |

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| <p>Illodo (2019)</p> | | | <p>respond to deals and promotions. To explore the relationship between 'deal-proneness' and 'value consciousness'.</p> | <p>Participants are selected to cover a range of demographic groups, including 'young pre-family urbanites'; 'middle-class families with children'; 'working-class struggling households'; 'lower middle-class families'; and 'older empty nesters'. The gender mix of the groups is intentionally 'skewed towards women' due to their role as 'primary decision makers in family travel'. Participants are recruited through a survey advertised to the public through various channels.</p> | <ul style="list-style-type: none"> • A 'new dynamic framework comprising four categories of attitudes towards deals' is proposed: 1) 'deals as a way of life'; 2) 'deals as a bonus'; 3) 'deals as a problem'; and 4) 'deals as toxic'. • Individuals flexibly adopt attitudes towards either 'value consciousness' or 'deal proneness', depending on factors such as the holiday context, stage in the life cycle and trip type. <p>Deals and holiday context</p> <ul style="list-style-type: none"> • When travelling abroad, many participants considered deals 'as a bonus'. When travelling in England, however, deals were perceived 'a problem', since obtaining value for money was difficult. <p>Deals and stage in the life cycle</p> <ul style="list-style-type: none"> • As people have families, their attitudes towards deals changes. Generally, workshop participants moved 'deals as a way of life' to 'deals as a bonus' as their family situation changed. <p>Deals and trip type</p> <ul style="list-style-type: none"> • Positive attitudes towards deals were more likely in the context of short-break domestic holidays as opposed to 'main', longer holidays. |
| <p>Trembath, Romaniuk, & Lockshin (2011)</p> | <p>Australia</p> | <p>2008</p> | <p>To study the impact of 'destination salience', as compared to 'destination attitude', on travellers' intention to visit or recommend a destination.</p> | <p>A mixed methods approach is used involving preliminary qualitative interviews followed by an online quantitative survey. Interviews, conducted with 20 randomly selected Australian residents, are used to identify key themes for the survey, including destinations for salience measurement. The online survey sample is drawn from a brochure fulfilment database maintained by the South Australian Tourism Commission. The survey includes 'situational and motivational cues' designed to measure the salience and attitude of Australian domestic tourists towards seven destinations. Logistic</p> | <p>Destination salience and destination attitude</p> <ul style="list-style-type: none"> • Destination salience was significantly related to intention to visit, even after taking into account previous visitation, a finding consistent for all seven destinations. • By contrast, attitude scores did not contribute significantly to intention to visit in any of the analyses. • The results 'provide support for the application of a brand salience model of consumer behavior.' |

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| | | | | regression is used to examine the relationships between brand salience and brand attitude (independent variables) and intention to visit (dependent variable). | |
| Rosslee & Chapman (2015) | UK | Not specified | To analyse the extent to which three UK domestic tourist destinations (Torquay, Paignton and Brixham) seek to create unique 'destination brand personalities' and to explore whether congruence exists between these destination personalities and tourists' own perceptions of these destinations. The study also explores the extent to which congruence exists between perceived destination personalities and tourists' self-concepts. | A mixed methods approach is used. In-depth interviews are undertaken with branding professionals in the three destinations. A self-completion survey is distributed to tourists via online email social media sites. Qualitative data is analysed via thematic analysis. Quantitative data is analysed statistically. | <p>Destination brand personality</p> <ul style="list-style-type: none"> UK domestic tourist destinations did attempt to create unique 'destination brand personalities' that differentiated them from other similar destinations. There were significant differences between the destination brand personalities cultivated by DMOs and perceptions of destination brand personality held by travellers. <p>Destination personality and traveller self-image</p> <ul style="list-style-type: none"> Across all three destinations, congruence is found between tourists' self-concept and perceived destination personality of the destinations they visited. Torquay in particular was shown to have significantly congruent relationships (57.7%). In one case (Brixham), the study finds 'a statistically significant relationship' between congruence and intention to recommend and return, thereby supporting the hypothesis that destination-self congruence 'has a positive effect on tourist behaviour.' In two cases (Torquay and Paignton), destination-self congruence did not influence intention to return or recommend. |
| Hays, Page, & Buhalis (2013) | International | 2011 | To analyse the use of social media platforms by leading international DMOs. | A mixed methods approach is used. The content of seven national tourism boards' official Facebook pages and Twitter accounts is analysed. The boards chosen are all among the top ten international tourism destinations as indicated by the United Nations World Tourism Organization (UNWTO) Tourism Highlights 2010 Edition | <p>Use of social media in destination marketing</p> <ul style="list-style-type: none"> DMOs' understanding of social media is typically 'vague and varied.' Most DMOs use social media platforms 'as they would any other marketing tool, neglecting the full potential of its ability to engage and invoke informal conversation.' DMOs need to learn to apply the following key actions when managing a social media presence: be active, be interesting, be humble, be informal and be honest. |

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| | | | | (Malaysia, UK, Spain, Mexico, Germany, France and Turkey). The study also conducts semi-structured interviews with DMO personnel and consults secondary sources (e.g. market intelligence and industry reports) to help benchmark performance of DMO social media marketing. Basic quantitative analysis is used to classify, measure and analyse how DMOs utilise social media. | <ul style="list-style-type: none"> • Social media is still not widely recognised and/or respected as a key tool in marketing strategies. It is frequently underfunded and/or neglected. |
| Mariani, Di Felice, & Mura (2016) | Italy | 2013 | To analyse the use of social media by 19 Italian regional DMOs and to explore the factors that make for effective online engagement with social media profiles. | A mixed methods approach is used. Preliminary interviews with social media managers of three major DMOs are conducted. Data is then collected from the Facebook pages of Italian regional DMOs. Data includes the number and types of post as well as the user responses elicited by posts. Collected data is analysed using descriptive statistics, and multivariate regression analyses. A second round of semi-structured interviews with DMO personnel investigates issues emerging from the data analysis. | <p>Forms of social media destination marketing that produce effective engagement</p> <ul style="list-style-type: none"> • Visual content (for example photos) and moderately long posts have a statistically significant positive impact on social media engagement metrics. • Higher post frequency and early post timing (in the morning) have a negative impact on engagement. • Strategies such as interactive opinion polls, games, quizzes and contests involving visual content (e.g. to select the cover picture of the Facebook page) seem to produce a particularly strong ‘call to action’ for end users. <p>Use of social media in destination marketing</p> <ul style="list-style-type: none"> • Italian DMOs still deploy social media in a ‘traditional top-down manner’, failing to make use of interactive user-driven approaches to engage with users and consumers. • The approaches used by DMOs to measure the success and effectiveness of their social media activity remain unclear. • Where metrics are used to measure the performance of social media activities, such measures rarely inform strategic marketing decisions. |
| Heeley (2016) | EU | Not specified | To trace the emergence of the concept of ‘competitive advantage’ as applied to destination marketing and to explore the extent to which this is applied by European | A mixed methods approach is used. A review of the academic literature on urban destination marketing is undertaken, together with online research on urban destination marketing of European urban DMOs. Interviews with senior | <p>Urban destination marketing and competitive advantage</p> <ul style="list-style-type: none"> • A broad body of literature highlights the importance of marketing strategies that focus on the distinct features and ‘competitive advantage’ of the destination. • Most European urban DMOs adopt a ‘toothless’ strategy that fails to underscore the competitive advantage of the destination. |

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| | | | urban DMOs. To understand the influence of destination marketing on destination choice. | DMO executives are also performed. | <ul style="list-style-type: none"> • Even where destinations have a genuine competitive advantage, many DMOs fail to ‘market the difference’, instead adopting an all-embracing approach of ‘marketing everything’. <p>Destination marketing and destination choice</p> <ul style="list-style-type: none"> • DMO marketing influences are at best peripheral to the various stages of the ‘visitor journey’, including destination choice. • The traditional information, sales and reservations functions of the DMO are increasingly being usurped by online intermediaries. |
| Jarratt, Phelan, Wain, & Dale (2019) | UK | 2013 to 2014 | To analyse the impact of ‘sense of place’ toolkit development on destinations and destination marketing. | The development of a ‘sense of place’ toolkit for Morecambe Bay, Lancashire is used as a case study. Participant observation toolkit development workshops is combined with document analysis and semi-structured interviews with workshop participants. | <p>Sense of place toolkits and destination marketing</p> <ul style="list-style-type: none"> • The development of a sense of place toolkit can help to foster a coherent and consistent sense of place within a destination (including unique selling points (USPs) and place branding strategies), with positive implications for destination branding. • Sense of place toolkit development can also aid the development of relationships and trust between local businesses and other stakeholders. • The development of sense of place toolkits should follow a number of key principles, among which include: the consideration of how destination USPs can be translated into digestible brand messages and images; and the involvement of as many destination stakeholders as possible. |