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Tourism Destination Positioning in the Global Tourism Market: Measuring and modelling holiday destination selection

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ABSTRACT
La competitività internazionale delle destinazioni turistiche è analizzata in questo lavoro modellando il processo decisionale di formazione della domanda turistica e svolgendo un'indagine statistica per valutare empiricamente le categorie del modello e misurare il posizionamento d'immagine e il posizionamento competitivo delle destinazioni. Tale impostazione ha consentito l'analisi dei fattori di competitività delle destinazioni turistiche derivante sia dalle caratteristiche oggettive dell'offerta (prezzi, struttura ricettiva, ambiente, storia, cultura, accessibilità fisica e telematica), sia dall'attività promozionale e dalla forza della "marca destinazione".
Il posizionamento delle destinazioni turistiche internazionali durante le diverse fasi del processo decisionale è stato valutato empiricamente mediante un'indagine telefonica su un campione rappresentativo della popolazione turistica italiana. Le destinazioni marine italiane perdono generalmente quota in questo processo in favore delle destinazioni marine spagnole il cui fattore di successo non è quindi tanto nella promozione il ranking delle destinazioni italiane nel brand positioning è buono) , quanto nelle caratteristiche dell'offerta e, in particolare, nel destination management che migliora il posizionamento competitivo di molte destinazioni estere (Costa Brava, coste croate e isole greche).

Keyword:
Competitiveness
Destination competitive position
Decision process
Italian tourism demand

Introduction

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The basic model of competitive analysis postulates that success in international competition in a given industry depends on the “factor conditions” or “drivers” of competitiveness which are based on a set of business related features and other factors such as human resources and infrastructures[1]; for the tourism industry the main factor conditions are landscape, historical heritage, hotel supply and leisure opportunities[2].
In this paper we outline a model of destination competitive positioning which widen previous results in two directions:

- specifying the role of product mix as prominent factor condition for tourism destinations
- focusing the role of destination organisation and of accessibility for winning the international competition.

Moreover, we run a statistical survey monitoring Italian tourists decisions in 2008 which allows the measurement of positioning and competitiveness of domestic and foreign destinations in the Italian tourism market.
Existing models of tourism destination competitiveness rest upon brand image and other attributes of the destination like climate, scenery, landscape and historical heritage (Enright M. J. and J. Newton, 2004; H. Jang, S. Lee, SW. Lee, S. Hong, 2007; Weelington W.J., Faria A.J., 2003). We extend previous research including supply side management choices at the firm and at the destination level. In our approach, product mix, organisation, infrastructures (transport services), accommodation and recreation services (museums, amusement parks, wellness centres) too, play a relevant role in determining positioning and competitiveness of tourist destination; this approach pinpoint a pattern suitable for quantitative analysis of the tourist decision process and allows the measurement of the actual competitive position of each destination in the global tourism market.

Modelling destination positioning

The growing relevance of tourism industry for modern advanced economies has increased the interest among researchers and policy makers for the analysis of holiday destination competitive position. Tourism literature has built up models of destination positioning focusing on factors endowment (climate, scenery and image position) and on the so called “drivers” of competitiveness (Weelington W.J., Faria A.J., 2003). Recently the recognised role of tourism activity for economic growth has promoted the construction of econometric models too (Enright M.J. and J. Newton, 2004) and has supported the estimation of destination competitiveness empirical indexes (Blanke J. and Chiesa T., 2009) which allow comparison of tourism destinations competitiveness at the macro level (countries and nations).
Our model focuses on the destination selection process at the micro level: from the demand schedule to the tourism consumption decision (choice of a specific destination for actual holidays).
The demand schedule is a function of:

- individual preferences
- brand image destination positioning
- destination competitiveness

[1] Porter M. E., *The competitive advantage of nations*, New York, Free Press, 1990; Peter and Olson, *Consumer Behaviour and Marketing Strategy*, Boston, Irwin, 1990; Bergen and Peterf, *Competitor identification and competitor analysis: a broad-based managerial approach*, John Wiley and Sons, 2002
[2] Ritchie J. R. Geoffrey I. Crouch, *The competitive destination*, CABI Publishing, Cambridge, 2003.

Consumption choices depend not only on the demand schedule, but also on the information collected by tourist in the final phase of the holiday decision process; in this phase tourists look for booking availability and update their destination knowledge for comparative evaluation.
Updated comparative information concern accommodation arrangement, hotel rooms availability, other overnight stay availability, climate, and leisure opportunities for the set of eligible holiday destinations; this set of additional data collected by tourists determines tourism consumption choice which, in some cases, could be far from the ex ante demand schedule because of supply side rationing in the hospitality market during some time periods, or because of booking channels expediency, efficient pricing strategy, appreciate product mix (wellness, sport and cultural events) and other management strategies.
The actual content of each phase in the selection process has been evaluated empirically by means of a statistical survey over a sample of Italian tourists. The statistical survey of Italian holiday demand and consumption has been planned and realized with the purpose of identifying the actual content and the drivers of each phase in the decision process. The measurement of tourism demand for each destination and the identification of the factors which drive the transformation of the demand schedule in consumption choices is the final goal of the survey. The survey was carried out interviewing a stratified sample of 1.200 tourists representing Italian tourist population; strata were defined by age, educational level, preferred holiday's activity. Interviews were conducted by phone and asked holiday preferences and choices of Italian people. Data collected describes the tourism destination selection decision process of Italian population at the micro level[3] and allows the identification of the set of destinations that they consider eligible for holidays. The survey monitors holiday preferences and detects the destinations evaluated by tourist in the comparative decision process which ends with the selection of the actual holiday destination (tourism consumption).

Mapping the tourist decision process

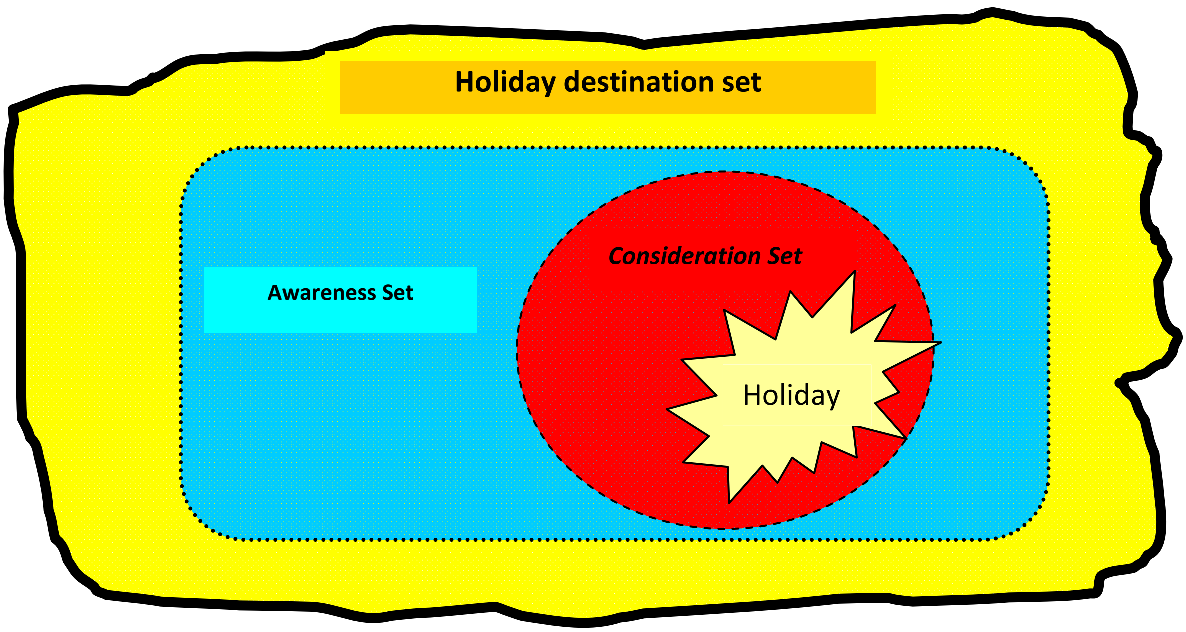
Theoretical analysis of the tourism decision structure at the micro level allows the definition of four different phases in the path going from holiday desires to the choice of a specific holiday resort.
The first phase in individual's demand configuration is a worldwide evaluation of holiday destination features by means of which potential tourist select a cluster of destinations which matches his/her consumer needs. In the following stages tourist takes on information concerning accessibility, booking, pricing, accommodation, connections facilities, marketing image, security and safety in the preferred tourism destinations. Destination evaluated may be chosen for effective holidays on the basis of information acquired during this process; other destinations are ruled out on the basis of the same set of destination hospitality data.
This process of holiday destinations selection can be presented schematically by a four phase process:

- Definition of the set including all destinations recognised by tourist as suppliers of tourism products (destination set).
- Identification of a subset of destinations whose general features (landscape, climate, and leisure opportunities) matches tourist needs (awareness set).

[3] Individual choices have been analysed by Jang, Lee and. Hong in the narrow context of honeymoon destination selection (see: H. Jang, S. Lee, SW. Lee, S. Hong *Expanding the individual choice-sets model to couples' honeymoon destination selection process*, Tourism Management n. 28, 2007).

- Research of preliminary information concerning towns and cities included in the previous set and identification of the destinations which satisfy consumer time and budget constraint (consideration set) and therefore, are eligible for effective holiday choice.
- Comparative evaluation of destinations competitiveness among those included in the previous set and selection of the actual holiday destination.

Graph 1. Mapping tourism decision process



The statistical survey makes clear the actual content of each phase of the holiday destination selection process and allows a complete mapping of Italian tourist decisions: from the formation of the demand schedule to the holiday consumption decision. This approach analyses simultaneously (in lock step) consumer choices of tourism destinations worldwide and the demand schedule underlying those choices.
Destinations in the global tourism market can be considered like firms which supply a large set of produced and non produced goods (multiproduct firms); each destination set of products can be identified by attributes concerning motivation and duration of the trip. The inclusion or the exclusion of a destination in each subset of the graph defines its position in the global tourism market; factors influencing the competitive position of destinations have been classified in three main clusters:

- natural and historical features of the destination;
- tourism services supply and pricing for accommodation, recreation, sport and culture (product mix);
- promotion strategies and commercial channels.

Brand image positioning is contingent primarily on marketing investment and advertising messages, while actual competitive positioning is a function of tourism infrastructures, pricing, events, landscape and heritage of each destination, beyond brand image. Positioning reflect mainly marketing strategy, while factor endowment and holiday product mix affect

destination competitiveness. Commercial channels and pricing are additional factors which influence this process. the distribution of tourism activity over time and the stability of tourism destination production levels.
Tourists decide The inclusion of destinations into each subset of the graph examining their product mix, prices, accessibility, security, safety and organisation of selected destinations. Promotion and marketing strategy affect mainly brand image positioning and ex ante demand, while destination management and supply structure affect carrying capacity, firm efficiency and the consistency of all elements in the destination product mix.
The comparison of data resulting from destination set and holiday set content with data concerning the number of trips and the amount of overnights stay released by the official Italian statistical agency (ISTAT) allows robustness check of our sample data.
The analysis of the actual content of each subset allows the evaluation of ex ante tourism demand for destinations and products (art city, wellness, sport, mountain, sea, sun and sand holidays) as well as the measurement of ex post actual holiday choices.

Questionnaire design and sampling scheme

The construct that describes the process driving the holiday destination choices has been defined translating the mapping of tourist decision process and the taxonomy of multiproduct tourism destinations into a questionnaire design which describes holiday decisions of individuals and families over the set of all tourism destination around the world; the questionnaire was filled by a sample of Italian tourists and gave rise to a data base reflecting the actual content of this decision process.
The survey questionnaire consisted of four major sections:

- Section 1: questions designed to gather holiday habits, preferences, actual holidays choice and overnight stay of Italian population in each tourist destination
- Section 2: questions designed to gather tourist demographic information
- Section 3: questions designed to identify the set of destination where Italian tourists would like to spend holidays (demand schedule)
- Section 4: questions designed to gather Italian tourism effective holiday destination choices (tourism consumption) during year 2008.

The measurement of actual world tourism destination positioning by means of survey data requires the accurate description of the decision process concerning motivation of the holiday destinations selection, duration of stay and services required in the holiday destination.
A stratified sample was projected for this population with *strata* defined by demographic features of target population: place of residence, age, education, occupation and gender. Confidence interval approach was used to determine the sample size at the 95% confidence level[4]. The target population is Italian tourists interested in marine holidays.
A pilot test was conducted to judge the internal consistency of the questionnaire items. The first draft of the questionnaire was distributed to 100 Italian tourists, randomly selected from the telephone directory, belonging to four macro Italian geographic areas (Northeast regions; Northwest regions, Central regions, South regions and Isles). A total of 68 completed surveys were returned and reliability analysis showed the robustness of the items with little

[4] Estimation of population variability is based on ISTAT Italian population holidays data.

exception that allowed the development of the final survey questionnaire (available on request by the author).
The survey questionnaire has been submitted (telephone interview) to a stratified sample of Italian tourists randomly selected from the telephone directory. A total of 1.200 surveys interview were fulfilled during January 2009. Robustness check has been carried out comparing holiday set data in our sample with the number of trips and the amount of overnights stay released by the official Italian statistical agency (ISTAT).
The data base generated by this survey allows the analysis of tourist's preferences and the identification of tourism demand schedules by attributes (gender, education, age) and of the actual holiday choices. Moreover, the data base shed light on the decision process by which Italian tourists choose effective holiday destinations inside the set of destinations which define their demand schedule: consumer review the set of destinations which meet their needs (consideration set), look for additional information and select the effective destination for their holidays.
Data were analyzed in three stages. First, descriptive-statistics analysis was applied to explore the overall profile of Italian travellers; this classification of tourists into homogeneous consumer groups provides interested segmentation of Italian tourism demand. In the second stage a grid of tourism products were labelled and data analysed within that grid. Finally, the theoretical structure defined above has been tested measuring the consideration set and the holiday set for Italian tourists. Comparing these two sets we enlighten the role of factor endowment, product mix, destination management and firm efficiency for the positioning of destinations in the global tourist market.

The segmentation of Italian tourism demand

Descriptive statistics show the segmentation of Italian tourism demand which is a useful tool for promotion and marketing strategies.
The segmentation by socio demographic characteristics shows interesting connections of these attributes with holiday behaviour.
The relationship between gender and tourism demand of Italian tourists are presented in the following Tables for long holidays (more than four overnights stay) and for short breaks (less than four overnights stay).
Tourism demand is greater for men than for women because of two reasons:

- a larger share of men takes holidays;
- frequently men takes more than one holiday per year

Moreover, men frequently have more than one holiday per year (repeated holydays).

Participation rate is larger for men than for women both for long and short holidays, but above all for long holidays.

Long holidays (*) participation rate by gender

	Women	Men
Yes	72.3%	76.8%
No	27.7%	23.2%

(*) more than four overnights stay

Short Holidays (*) participation rate by gender

	Women	Men
Yes	74.2%	77.2%
No	25.8%	22.8%

(*) less than four overnights stay

Holidays demand of Italian tourists by gender

Long holidays				Short holidays		
	Women	Men			Women	Men
Non repeated (only 1 holiday per year)	69.6%	65.5%		Non repeated (only 1 holiday per year)	32.3%	24.6%
Repeated (more than 1 holiday per year)	30.4%	34.5%		Repeated (more than 1 holiday per year)	67.7%	75.4%

The segmentation by education level shows some more interesting results: connections between education and participation rates are strong both for short and long holidays. The correlation index among years of school and number of holiday per year is 0.74 for long holidays and 0.65 for short holidays.

Holiday participation rate by education levels

	Long holidays				**Short holidays**		
	Secondary school	Academic degree	Primary school		Secondary school	Academic degree	Primary school
Yes	69.0%	62.3%	85.1%		72.7%	65.8%	82.6%
No	31.0%	37.7%	14.9%		27.3%	34.2%	17.4%

Holidays (*) participation rate by age

	Short holidays				**Long holidays**		
Age	***0-24***	***25-44***	***45+***		***0-24***	***25-44***	***45+***
Yes	69.2%	69.8%	79.8%		61.5%	67.7%	79.9%
No	30.8%	30.2%	20.2%		38.5%	32.3%	20.1%

Age too is positively correlated with the holiday participation rate both for short and long holidays.

Consideration set: holiday preferences of Italian tourists

The data base obtained from the survey allows the identification of the ensemble of destination where Italian tourists wish to spend holidays (consideration set) and of the effective destination chosen for actual holiday (holiday set). In fact, the survey questionnaire has detected the destination evaluated by Italian tourists for their (latest) holiday because their landscape, product mix and historical heritage fit their needs.
Tourist destination competitive position which comes out of all management strategies (brand, product, price, and organisation and distribution channel) can be classified within four broad classes of competition:

1. Brand Competitors[5]: products which share the same consumer target (for price and quality)
2. Product Competitors: destinations which differ by price and quality
3. Generic Competitors: tourism services which satisfy the same needs
4. Total budget competitors: products very different which compete only for budget constrains

The four classes are characterized by increasing differences among product mix: starting from the brand competitors, which are similar and distinguished only by brand (Rimini and Viareggio beach), to budget competitors which are quite different (wellness resort and amusement parks) and share only the budget constraint.
In the next paragraphs we measure the share of each destination inside Italian demand for holidays analysing the destinations included in the consideration set and the statistical distribution of destination preferences stated by Italian tourists (survey interview) within the holiday set. Moreover, aggregating destinations by kind of holiday (wellness, sport, mountain, cruise, tour, sea, sun and sand) we are able to analyse the composition of Italian tourism demand by product: seaside or mountain resort, wellness and sport holidays, cruises and tours.

6.1. Consideration set: holiday destination preferences

The top five destinations in Italian Tourism demand are the coasts of Sardinia, Sicily, Rimini, Apulia and Catalonia (Costa Brava, Spain).

Top destinations in Italian tourism demand

	Destinations	
		share
1	Sardinian coast	9.42%
2	Sicilian coast	9.36%
3	Rimini Riviera	6.85%
4	Apulia Riviera	6.00%
5	Costa Brava	5.48%
6	Greek islands	5.38%
7	Veneto coasts	4.36%
8	Croatia coasts	4.30%
9	Carribean islands	3.70%
10	Amalfi Coast	2.57%
11	Red sea coast (Sharm el sheik. etc.)	2.15%
12	Cap Vert coast	1.85%

[5] Weelington W.J., Faria A.J. “Business manager identification of competitors”. Development in business simulation and experiential learning, v. 30, 2003.

Grouping holiday destinations by country we find that a large number of Italian tourists still choose domestic destinations (43.8%), but the majority of Italian travellers (56.2%) look on destinations abroad for their holidays (go abroad for holidays) and Spain has the largest market share of Italian tourism demand among foreign destinations.

Italian tourism demand at the global level (Consideration set***)***

Country/Nations	*Share*	*Country/Nations*	*Share*
Italy	43.80%	Tunisia	1.90%
Spain	15.05%	Maldives	1.83%
Greece	5.23%	Slovenia	1.44%
France	3.47%	Czech Republic	1.31%
Egypt	3.27%	India	1.18%
Croatia	3.07%	Mexico	1.11%
United Kingdom	2.62%	Cap Vert	1.05%
Austria	2.62%	Russia	0.98%
Holland	2.42%	Thailand	0.85%
United States of America	2.29%	Brazil	0.79%
Germany	1.96%	Iran	0.65%
		Others	1.11%

6.2 Consideration set: product competition (Italian's tourism demand by type of destination)

Grouping destinations by kind of holiday we are able to clear holiday products preferences of Italian tourist and to analyse product competition among tourist destinations in the Italian tourism market.

Product competition analysis has been carried out ordering holidays in seven classes: marine (sea, sun and sand), mountain, culture, religion, cruise, wellness, sport and tour.

Survey data show that marine destinations are still the most preferred by Italian tourists with a share higher than 60%. Mountain and art cities destinations follow with shares of 16.03% and 14.75% respectively. Other types of holiday destinations have smaller and quite negligible shares.

Holiday typology preferences of Italian tourists in world destinations

Destination typology	***Share***
Sea, sun and sand	62.13%
Culture and art cities	14.75%
Mountain	16.03%
Tour	3.97%
Cruise	0.71%
Wellness	0.99%
Other (religion, country and sport)	1.42%

6.2. Disaggregating preferences by demographic attributes

The results obtained segmenting tourism demand level at the aggregate level has shown that tourism demand levels are closely related to tourist socio demographic attributes. We can now go into more depth segmenting single product tourism demand by education level, age and gender.
Gender differences are relevant for mountain destinations which are strongly preferred by men (20.9% of share against 13.45% for women) and for art cities destinations which are preferred by women (16.5% against 12.54% for male). Marine destinations (sea sun and sand holidays) have the largest share both for men and women, without relevant gender differences. In general gender attributes are (slightly) statistically significant to explain the differences in holiday preferences ($\chi2=20.256$; p-value =0.041).

Holiday preferences by gender

	PREFERRED HOLIDAYS	
	Women	Man
Sea, sun and sand	62.17%	62.06%
Culture and art cities	16.50%	12.54%
Mountain	13.45%	20.90%
Tour	5.08%	2.57%
Cruise	1.02%	0.32%
Wellness	1.02%	0.96%
Other (religion, country and sport)	0.76%	0.64%

Analyzing holiday preferences by education we find relevant differences among tourists with different schooling levels: graduates have the smallest preference for sea holiday and the highest preference for culture and art cities holidays while marine destinations are preferred mainly by primary school level tourists. In general the differences in holiday preferences classified by school levels are statistically significant; education levels affect holiday preferences strongly: the null hypothesis is rejected with high probability level ($\chi2$= 150, 31; p-value[6] = 0, 00000).

Holiday choices by schooling levels (world destinations)

	primary school	**secondary school**	**university degree**
Sea, sun and sand	64.79%	61.59%	59.82%
Culture and art cities	12.75%	11.26%	20.72%
Mountain	16.15%	20.33%	11.23%
Tour	3.25%	3.40%	5.38%
Cruise	0.40%	0.59%	1.17%
Wellness	1.42%	1.04%	0.48%
Other (religion, country and sport)	1.24%	1.80%	1.20%

National demand and effective demand for tourism destinations

In previous paragraphs we have sketched out the structure of Italian tourism demand and depict the competitive position of holiday destinations worldwide; that data do not measure

[6] χ^2 *p-value* equals $2{,}9*e^{-20}$.

actual production levels of destinations because of some factors and frictions which avoid a direct transformation of demand in consumption. The first factor is time inconsistency between tourism demand and supply in some periods and seasons; tourism services cannot be stored hence during high season some destinations may be full and ought to refuse further booking demand (excess demand). In this case tourists may choose alternative destinations creating a gap between preferences and actual choices. Other factors could be nested in commercial channels, pricing strategies and accessibility.
The survey data base evidences that actual holidays choices do not follow preferences in a straight manner. The gap between preferences and actual choices is positive for sea and mountain destinations, while for art cities, tour, cultural and wellness holidays the gap is negative (actual holidays share of these clusters exceed the share of "a priori" demand).
The differences are significant at the 99% probability level for art cities, tour, sea sun and sand holiday. The most relevant gap between demand schedule and actual holiday consumption choices concerns marine destinations which lose 10.21 percentage points of their potential demand in the decision process going from demand schedule to holiday consumption; art cities, wellness destinations and cruise have an opposite gap: for these types of holidays Italian tourists buy more trips than desired (+5.38% and +3.54% respectively).

Market shares in the consideration set and in the holiday set by tourism products

Destinations	Notional demand[7]	Effective demand [8]	Gap
Sea, sun and sand	62.13%	51.92%	-10.21%
Culture and art cities	14.75%	20.13%	5.38%
Mountains	16.03%	14.54%	-1.49%
Tour	3.97%	7.51%	3.54%
Cruise	0.71%	2.56%	1.85%
Wellness	0.99%	2.08%	1.09%
Other (religion, country and sport)	1.42%	1.28%	-0.14%

The differences between preferences and choices may derive not only from demand supply time inconsistency, but also from the interaction fulfilled by tourists during the booking process. Inside this process tourists could gain new information about pricing, quality and accessibility of the selected destinations which could shift their decision.
The aggregated table shows only the net balance and hides the real dimension of flows among the different types of holiday in the final phase (booking) of the holiday decision process (from preferences to choices). In order to analyse the whole extent of disequilibrium in holiday products we need not only the measure of net disequilibrium (balance), but also the measure of the gross flows from one type of destination to a different holiday destination.
Analysing micro data in more detail we can define a full matrix describing the flows from the different type of holidays that happens when tourist decide the actual holiday destination (transition matrix).
The main diagonal of the matrix shows the percentage of tourist who choose a destination coherent with their preferences, while the off diagonal elements identify tourists who changed their choice during the booking phase. The most relevant flows concern mountain destinations which loose a large part of their potential customers (only 38.1% of people

[7] Holiday's product shares in the consideration set.
[8] Market shares in the holiday set.

wishing a mountain holiday choose a mountain destination); 22.9% of tourist who are fond of mountain choose culture and art cities destinations for their holidays and 32% of them choose marine destinations; there are also opposite flows from art city customer to mountain resort (2.69%) and to marine destinations (2.1%). Culture and art cities benefit also from the infidelity of cruise customers: 20.2% of tourist aiming a cruise holiday allow themselves an art cities tour. The coherence between preferences and choice is greatest among cruise tourists (79.8%) and only art city destinations benefit from their disaffections. Off diagonal data show at last the relevant flow of tourists who choose a tour and art cities holiday in spite of their preference for sea sun and sand destinations: 18.6% of tourist preferring marine destinations choose a tour with art cities. Only 75.3% of notional demand for marine holidays turns into effective demand (holiday consumption).

Effective choice destinations distribution for each preference class

	Notional tourism demand (ex ante preferences)					
	Cruise	Wellness	Culture...	Mountain	See, sun and sand	Other
Tourism consumption						
Cruise	79.8	0	3.13	4.2	2.1	9.3
Wellness		72.4	0.54	1.4	1.0	
Culture, art cities tour	20.2	0.00	61.52	22.9	18.6	25.1
Mountain	0	9.2	2.69	38.1	2.1	0
See, Sun and sand		0	31.98	32.0	75.3	25.4
Other (religion, country and sport)		18.4	0.15	1.4	1.0	40.2
Total	100	100	100	100	100	100

The transition from different destinations/types of holidays may be due not only to time inconsistency between demand and supply, but could also reflect new information. These news regard prices, security, safety, commercial channels, accessibility (airport and route connections) and the organisation of destination hospitality. The price factor may be relevant not only for its level, but also for the pricing strategy of firms and destinations (all inclusive packages[9] versus splitting services purchases[10]).

Destination management and hospitality room vacancy in the required periods gained by tourists during the booking process are the two macro phenomena which affect shifting preferences (data outside the main diagonal) and determine the differences between notional and effective demand.

Tourism choices and destination activity (effective destination demand)

In the previous paragraph we analysed the shift in tourism product preferences and the factors influencing tourism consumption choices; we turn now to the analysis of its relevance for destination market shares and tourism activity at the resort level.

[9] Integrated packages for accommodation, restoration, leisure, auxiliary services for sand, beach and mountain (beach umbrella, deckchair, ski lift) frequently promote positive close of booking while splitting services may put potential customer in trouble, avoid booking and change his/her choice.

[10] Pricing model does not depend directly from the productive structure: a system of small firms specialized in accommodation, restoration, leisure, and auxiliary services, may be linked at the commercial level and could therefore be able to propose package holidays structurally competitive with those of the vertical integrated firms.

Sardinian, Sicilian, and Apulia coasts loose market shares, while Veneto and Costa Brava coasts win the market competition for actual holidays destination selection (see table). Greek islands coasts too increase their market share in the final phase of the holiday destination decision process. Among the top ten destinations there are also many Tuscany cities with shares larger than those emerging from the consideration set. In reverse, Rimini Riviera is the destination with the largest loss: its market share falls by 29.6% in the final stage of holiday decisions (from 6.85% in the consideration set to 4.82% in the holiday set).

Market shares in the consideration set and in the holiday set by resort

	Notional tourism demand	Effective tourism travels
Sardinian coast	9.42%	7.80%
Sicilian coast	9.36%	6.20%
Rimini Riviera	6.85%	4.82%
Apulia Riviera	6.00%	5.60%
Costa Brava	5.48%	7.85%
Greek islands	5.38%	6.22%
Veneto coasts	4.36%	6.45%
Croatia coasts	4.30%	3.20%
Carribean islands	3.70%	2.21%
Amalfi coast	2.57%	2.60%
Red Sea coast (Sharm el Sheik, etc.)	2.15%	1.40%
Cap Vert coast	1.85%	0.54%

Comparing the demand schedule (consideration set) with actual choices we point out the considerable decline in market share of Italian marine destinations (with the only exception of Veneto Coasts) and the increase of Costa Brava and Greek islands market share.
Improvement in market share could be due to efficiency in:

- pricing strategies,
- destination management,
- marketing and promotion,
- commercial and booking channels.

If these factors match consumer preferences destinations market share will increase and, in the opposite case, it will decrease. Italian see, sun and sand destinations worsen their market position while Spanish and Greek destinations increase their market share in the final phase of the holiday decision process (in the transition from the consideration to the destination set).
Supply shortage could explain the loss for Italian marine destinations during the summer season in which there is a strong concentration of tourism demand; the time distribution of tourism activity in the competitor destinations (Costa Brava and Greece) are more uniform (less unstable). The overnight stay monthly distribution has a lower variance in Costa Brava and Greece than in Italian marine destinations.
Which process can explain the transition from the destinations included in the consideration set (desired resort) to the destinations really chosen for holiday? And which factors determine the selection of effective holiday? The variance of tourism activity level increases the probability of disequilibrium situations and damages destination competitive position reducing its market share. Rimini Riviera is a symbolic case: monthly overnight variance is higher than in Costa Brava and the two destinations achieve opposite results: Rimini Riviera looses 29.8% while Costa Brava gains 43.2% of their market shares in the consideration set during the final step of the holiday decision process (inquiring about prices, accessibility and booking). Time inconsistency is not the unique factor in this process; the final set of information may evidence accessibility troubles, pricing inadequacy, booking channels

deficiency for hotel or for ancillary services (beach services, day trip feasibility, cultural events, etc), safety risks and other destination troubles (destination management).

Conclusions

The four phases in the holiday decision process defined at the micro level in the theoretical framework turn out to be a suitable model for empirical analysis. The identification of the consideration set and of the holiday set for Italian population enables evaluation of the notional and effective tourism demand for destinations and for products.
Worldwide evaluation of holiday chance based on general knowledge of destination features (brand image positioning) lead to the definition of a demand schedule for holiday products and resort; consideration set is the empirical counterpart of the demand schedule.
The statistical survey evidenced the actual content of each phase in the process driving holiday destination choices of Italian tourists, allows the identification of the consideration set and the measurement of world tourism resort positioning inside the Italian tourism demand.
The sample survey detected also actual holiday choices of Italian population giving empirical content to the economic notion of effective tourism demand for tourism destinations and products. Actual holiday choices data have been collected in the “holiday set”; this set of data measures actual tourism demand for destinations and for products.
The two sets of data (consideration set and holiday set) let the measurement of ex ante (potential) and ex post (effective) destinations market share; the differences between tourism demand and tourism consumption for each item (destination or product) often have considerable extent evidencing market disequilibrium. Demand supply time inconsistency and destination management are the main determinants of market disequilibrium. Marketing strategies affect brand positioning and notional tourism destination demand, but actual destination tourism demand and production rest with supply management: pricing strategies, booking channels, accessibility policy, security and safety at the destination level. These factors influence market share prominently and cause relevant changes in destination competitiveness.
Italian marine destinations are generally penalized in this process, while Spanish destinations benefit from destination management and increase the market share defined by their brand image market position during the information process which bring consumers from the ex ante evaluation (consideration set) to the final consumption holiday choice (holiday set).
The policy implications of these results are relevant: marketing and communication strategies should be supported by supply side policies and sound destination management strategies. Wrong destination management makes brand image investments useless because the probability of being selected for actual holiday is not proportional to the share of inclusion in the consideration set; the selection process among the eligible destination is not random, but is driven by real efficiency of tourism firm, good pricing policies at the destination level, easy, affordable and fast destination accessibility.
The differences between the consideration set and the holiday set reflects the structural relationship among preferences, image positioning, product and destination management (competitiveness); some flows may also be explained by the stochastic process described by the transition matrix, but the significance of the differences between market shares in the two sets prove the existence of structural effects. The relevant distances between the *ex ante* demand schedule (pointed out by the consideration set) and the *ex post* data concerning effective holidays noticed for many tourist destinations proves the existence of supply side effect at the firm level (pricing strategies, services packaging, marketing, promotion, commercial and booking channels) and at the destination organisation level (landscape, historical heritage, competition policy, accessibility, security and safety).

The model and its empirical counterpart show the quantitative relevance of brand image and supply side policy for tourism destination performances.

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