

Marketing the Unseen: Ignoring Same-Day Visitors Damages Destination Strategy

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Marketing the Unseen:

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Abstract:

This study examines how regional tourism measurement systems shape destination marketing, visitor experience management and strategic planning. Using the canton of Fribourg as a qualitative case, it reveals that despite abundant data, key segments, especially same-day visitors, remain statistically invisible. These blind spots distort market segmentation, weakens branding and communication strategies, and limits the capacity to anticipate flows or improve satisfaction across the full tourist journey. Interviews with regional tourism operators highlight fragmentation, inconsistent definitions and limited analytical capacity, which undermine data-driven marketing. We argue that measurement systems determine which segments become strategically “visible” and which are ignored. The study calls for multi-source, territorially grounded monitoring capable of capturing same-day mobility to strengthen customer insight, sustainability and the overall coherence of destination strategies.

Keywords: Tourism Measurement Innovation, Data Gaps, Same-day visitors

Track: Tourism Marketing

1. Introduction

Tourism marketing increasingly requires destinations to understand and manage the full customer journey, from pre-trip search and transportation choices to on-site experiences and post-visit engagement. Achieving this requires robust, granular and context-sensitive data that allows tourism bodies and businesses to design relevant value propositions, anticipate demand, optimise mobility flows and enhance the satisfaction of diverse visitor segments. Yet, in many regions, marketing strategies continue to rely on measurement systems developed for national-level comparability rather than for operational decision making. In a context marked by post-pandemic behavioural shifts, greater emphasis on sustainability and increasing volatility in mobility patterns, robust and context-sensitive measurement has become more critical than ever (Figini et al., 2022; OECD, 2024; UN Tourism, 2023).

Traditional macroeconomic tools, most notably the Tourism Satellite Account (TSA), Input–Output (I-O) models, Social Accounting Matrices (SAM) and Computable General Equilibrium (CGE) models, provide a structured and coherent way to quantify tourism's contribution at national scale. TSA offers a harmonised framework for integrating tourism into national accounts; I-O models trace intersectoral linkages; SAM extends these linkages to income flows; and CGE models simulate economy-wide responses to shocks or specific situations changes. While powerful, these tools remain insufficiently sensitive to territorial specificities (Frechtling, 2011; Miller & Blair, 2009; UNWTO et al., 2008). Designed for national aggregates, these tools rely on standardised administrative data that seldom reflect the granularity, heterogeneity and seasonal dynamics of regional tourism systems (Candela & Figini, 2012). Recent European assessments highlight persistent fragmentation and gaps in regional-level evidence, even in countries with well-developed statistical infrastructures (Figini et al., 2022; OECD, 2024).

These constraints raise fundamental questions about how tourism knowledge is produced and which segments of activity become statistically visible or remain structurally overlooked. Among these blind spots, same-day visitors represent a strategic omission. Despite playing a central role in mobility patterns, they leave few administrative traces and are largely absent from statistics. Their invisibility not only underestimates the economic footprint of tourism but also weakens the capacity of destination management organisations (DMOs) to design targeted communication, adapt infrastructure, manage congestion and deliver satisfying experiences across the full tourist journey. In a context marked by

sustainability imperatives, rapid digitalisation and changing visitor expectations, overlooking such a segment limits the effectiveness and credibility of tourism marketing strategies.

The canton of Fribourg offers a relevant setting to examine how measurement practices shape capabilities and strategic choices. Its mix of urban and rural areas, diverse settings with various offerings and strong sustainability ambitions reveal tensions between macro-level statistical tools and the operational needs of local stakeholders. By examining how data are produced, interpreted and used across the region, the research investigates how measurement systems constructs partial visions of the visitor economy and how these partial representations affect marketing strategies and the management of visitor experiences. The study positions these dynamics within broader debates on the territorialisation of tourism measurement and the governance of data in destination management (Candela & Figini, 2012; Dwyer et al., 2004; Figini et al., 2022; OECD, 2024).

Building on these considerations, the paper addresses the following research questions: Which dimensions of tourism's economic effects are captured, under-represented or missing in current regional measurement practices? What types of information do stakeholders consider essential to support tourism marketing and strategic decision making ? How can improved governance and data infrastructures strengthen the ability of destinations to manage and market the full tourism product ?

2. Methodology

This study adopts a qualitative, exploratory research design to understand how tourism measurement practices, data infrastructures and stakeholder expectations shape the representation of tourism at the regional level. A qualitative approach enables the capture of situated knowledge, informal practices and blind spots that standardised quantitative tools fail to capture (Patton, 2002; Kvale & Brinkmann, 2009). The research focuses on the canton of Fribourg, a territorially diverse region involving tourism organisations, public authorities, destination organisations, cultural actors and mobility providers.

Data were collected through thirteen semi-structured interviews using purposive sampling (Palinkas et al., 2015) to include informants directly involved in producing or using tourism data. Interviews, conducted by two researchers, lasted 45 to 75 minutes and followed a flexible guide addressing data practices, information gaps, governance conditions and expectations regarding regional indicators. All interviews were recorded, transcribed and anonymised. Data analysis followed a thematic approach (Braun & Clarke, 2006). Initial open

coding was refined into thematic categories aligned with the study's objectives, supported by NVivo for systematic organisation. Reliability was strengthened through investigator triangulation (Denzin, 1978) with at least two researchers independently coding the material and resolving discrepancies through discussion. All procedures respected ethical guidelines. Participants provided informed consent, and all materials were stored securely and anonymised throughout the research process.

Table 1. Anonymized profile of the interviewees

Interview Code	Type of Organization
INT-01	Cantonal tourism organization
INT-02	Multipurpose center
INT-03	Agri-food company with a tourism focus
INT-04	Hotel industry association
INT-05	Collective hospitality association
INT-06	Regional tourism organization
INT-07	Cultural association
INT-08	Restaurant association
INT-09	Camping association
INT-10	Tourist transport company (mountain area)
INT-11	Tourist transport company (mountain area)
INT-12	Multipurpose center
INT-13	Transport company

3. Results

This section presents the empirical findings from the qualitative analysis of stakeholder interviews in the canton of Fribourg. Five overarching themes capture how actors describe the functioning, limitations and expectations of the current regional tourism information system: (1) current measurement practices, (2) structural blind spots, (3) resource constraints and (4) data sensitivity and governance.

3.1. Current measurement practices: data availability, quality and comparability

Across interviews, respondents describe a context where substantial tourism-related data are collected, yet only partially exploited. Several stakeholders characterise the system as ‘data-rich but insight-poor’, pointing to abundant statistics yet limited analytical capacity. Actors “*have statistics coming from everywhere*” but lack “*the time to analyse them*” (Interviewee). Public authorities, tourism organisations and operators generate figures on

overnight stays, visitor counts, ticketing and transport, often for multiple recipients, creating a fragmented information environment that is difficult to reconcile. As one participant summarised, “*we all measure something, but rarely the same thing*” (interviewee), highlighting how fragmentation undermines comparability and joint action.

Three limitations emerge: (1) precision and granularity: indicators are often too aggregated, and the dominance of overnight statistics means that “*tourism in Fribourg today is mostly assessed through overnight statistics*” (interviewee). (2) definitional inconsistency: what counts as a visitor, a stay or a type of accommodation varies across actors, leading one participant to ask “*What do we even include under ‘type of accommodation’?*” (interviewee). (3) timeliness: delays between data collection and publication reduce the usefulness of indicators for managing seasonal fluctuations.

To compensate, stakeholders rely heavily on informal exchanges and tacit knowledge. This parallel knowledge system partly offsets statistical gaps yet reinforces dependence on informal coordination. As one interviewee puts it, “*When we talk among providers, informal data becomes information. It has enormous value*” (interviewee) highlighting both its benefits and the limits of the current framework.

3.2. Structural blind spots in the regional tourism information system

Beyond issues of quality and comparability, stakeholders identify deeper blind spots: segments, activities and mobility patterns that remain weakly measured or entirely invisible.

3.2.1 Grey zones and missing segments

Non-hotel and para-hotel accommodation (second homes, holiday apartments, farm stays, small guesthouses) are repeatedly cited as poorly captured because many operate outside formal standard reporting channels. One interviewee notes that a small guesthouse “*may be full one day and completely empty the next, because their activity depends on a wedding downstairs rather than on tourism as such*” (interviewee), illustrating both volatility and classification challenges. Dispersed cultural and recreational activities, festivals, small events, guided tours, leave minimal statistical traces. For several respondents, “*the information that really matters is not in the statistics but in the everyday signals*” (interviewee) reinforcing the perception that key components of the visitor economy remain invisible.

3.2.2 Same-day visitors as a major blind spot

Same-day visitors emerge as the most critical blind spot. Interviewees report a near-total absence of information on their volume, origin or behaviour: *“We simply do not know how many excursionists come to Fribourg, nor when or where they go”* (interviewee). This strategic invisibility limits the ability to forecast flows, adjust mobility services and design targeted communication, leading to reactive rather than anticipatory management. During major events, media and policymakers request attendance figures, yet *“every year, we cannot provide a solid answer”* (interviewee).

This invisibility has strategic consequences. Same-day visitors generate strong pressures on infrastructure, transport and natural areas, yet without monitoring, these impacts remain difficult to anticipate. Economically, stakeholders stress that *“day visitors spend money, but since they don’t stay overnight, they disappear from the system”* (interviewee). Same-day visitors therefore represent both a statistical and a strategic blind spot.

3.3. Resource constraints and production costs of information

Resource constraints affect both the production and use of tourism data. Respondents describe the burden of supplying figures to multiple institutions: *“We are constantly asked for numbers, but gathering and preparing them takes time that smaller organisations simply do not have”* (interviewee). Repeated requests in different formats create fatigue, particularly when contributors receive little feedback: *“We rarely receive anything in return, no analysis, no benchmark, no synthesis. It feels like numbers disappear into a void”* (interviewee).

On the analytical side, many organisations lack the expertise and time required to convert raw data into actionable insights. As an interviewee noted, *“We have spreadsheets, but turning them into something useful requires expertise we simply do not have”* (interviewee). These constraints foster ambivalence towards enhanced monitoring: actors value better information but insist that new systems must avoid additional burdens.

3.4. Data sensitivity, sharing and governance

Concerns about data sensitivity and governance strongly influence actors’ willingness to share information. Three conditions emerge as central: (1) anonymisation: *“No one wants their numbers exposed in a way that could identify their business”* (interviewee). (2) clarity of purpose: *“We need to know who will use the data and for what reason. Otherwise, we won’t share anything”* (interviewee). (3) professional management and security: *“Data must be handled professionally, people worry about misuse or leaks”* (interviewee).

Trust thus appears as a prerequisite for collaboration: *“If there is no trust in how the data will be used, there will be no data at all”* (interviewee). Many stakeholders ask for an intermediary to be a legitimate coordinator of data collection and harmonisation, provided that entity has clear mandates, sufficient resources and the capacity to enforce shared standards.

4. Discussion

This discussion synthesises the empirical results through the lens of the theoretical framework, highlighting how macro-oriented tourism measurement systems misalign with regional realities and systematically obscure key components of visitor activity.

4.1. Reinterpreting tourism measurement through a territorial lens

National accounting tools such as TSA, I–O, SAM and CGE models remain essential for macroeconomic comparability but lack the granularity needed for regional decision-making (Dwyer et al., 2004; Frechtling, 2011). Interviews confirm that actors face an overload of general data yet lack operationally useful information. This misalignment illustrates how measurement systems act as classificatory regimes that determine which forms of mobility and leisure activities are recognised as tourism in statistics. The dominance of overnight statistics, favoured because they are easy to collect, reinforces selective visibility and fails to reflect the fluidity and heterogeneity of regional tourism flows.

4.2. From measurement gaps to structural blind spots

Data gaps are part of a broader pattern of structural invisibility. Para-hotel units, dispersed activities and informal participation often fall outside formal reporting systems. Stakeholders frequently compensate with tacit knowledge, revealing a disconnect between institutional indicators and lived realities. This dynamic echoes work on how measurement systems construct what counts as tourism, making some activities legible while others remain obscured (Baggio, 2019).

4.3. Same-day visitors as the central blind spot

Same-day visitors represent the most significant omission. Their invisibility is both empirical and conceptual: definitional instability across national systems undermines comparability, policy relevance and ecological interpretation. Despite recognition in international standards (UNWTO, 2008), national systems apply divergent definitions (Banca d’Italia, 2024; Statistical Office of the Republic of Slovenia, 2025; Welsh Government, 2024; Swiss Federal Statistical Office, 2024), limiting analytical comparability. In Fribourg,

excursionists leave few administrative traces and remain statistically absent. Their invisibility weakens communication, planning and mobility management and leads to systematic underestimation of tourism's economic contribution, as shown in other European contexts..

4.4. Governance, trust and analytical capacity

Measurement challenges are also relational and organisational. Trust, confidentiality concerns and unclear mandates inhibit data sharing (Bichler & Lösch, 2019). Limited analytical capacity further restricts actors' ability to transform raw data into strategic insights. While dedicated organisations could coordinate data flows, they require clear mandates, adequate resources and transparent governance structures.

5. Conclusion

This study showed that tourism measurement practices, data infrastructures and governance dynamics determine what becomes visible, or remains invisible, in Fribourg's regional tourism system. Despite abundant data, structural blind spots persist, with the invisibility of same-day visitors standing out as the most salient. Recognising excursionists is not a technical refinement but a conceptual necessity: without their integration, regional tourism assessments remain biased and strategically incomplete. Their absence distorts economic estimates, weakens planning and limits the capacity to understand visitor behaviour across the full tourist journey. Divergent national definitions further destabilise the category, limiting comparability and obscuring ecological impacts. Same-day mobility can redistribute visitor pressure. Yet without monitoring, it may intensify stress in sensitive areas, reinforcing the need for clearer conceptual boundaries.

From a marketing perspective, making same-day visitors visible is essential for strengthening customer insight, enhancing branding credibility and improving the management of visitor flows. More broadly, the fragmentation of data sources and the limited analytical capacity observed across regional actors underscore the need for interoperable standards, integrated dashboards and stronger analytical skills to transform raw information into actionable marketing intelligence. Improved measurement of same-day mobility would also support dynamic flow management and more credible sustainability narratives. Accurately capturing same-day visitors is essential, not a technical refinement but a prerequisite for reliable economic, operational and environmental assessments.

Overall, the findings highlight that more complete visibility of regional tourism is a prerequisite for coherent destination strategies. Improving monitoring systems requires multisource data, finer granularity and coordinated governance capable of reconciling local relevance with broader comparability. Theoretically, the study shows that measurement systems construct selective regimes of visibility that privilege overnight stays and overlook fluid, short-duration mobility. Practically, it identifies priorities for policymakers and destination managers seeking to enhance marketing effectiveness and visitor satisfaction. Future research should broaden the actor base, integrate digital mobility data and develop hybrid monitoring systems that support data-driven, sustainable and strategically aligned tourism development. Only by expanding what becomes measurable can destinations expand what becomes governable.

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