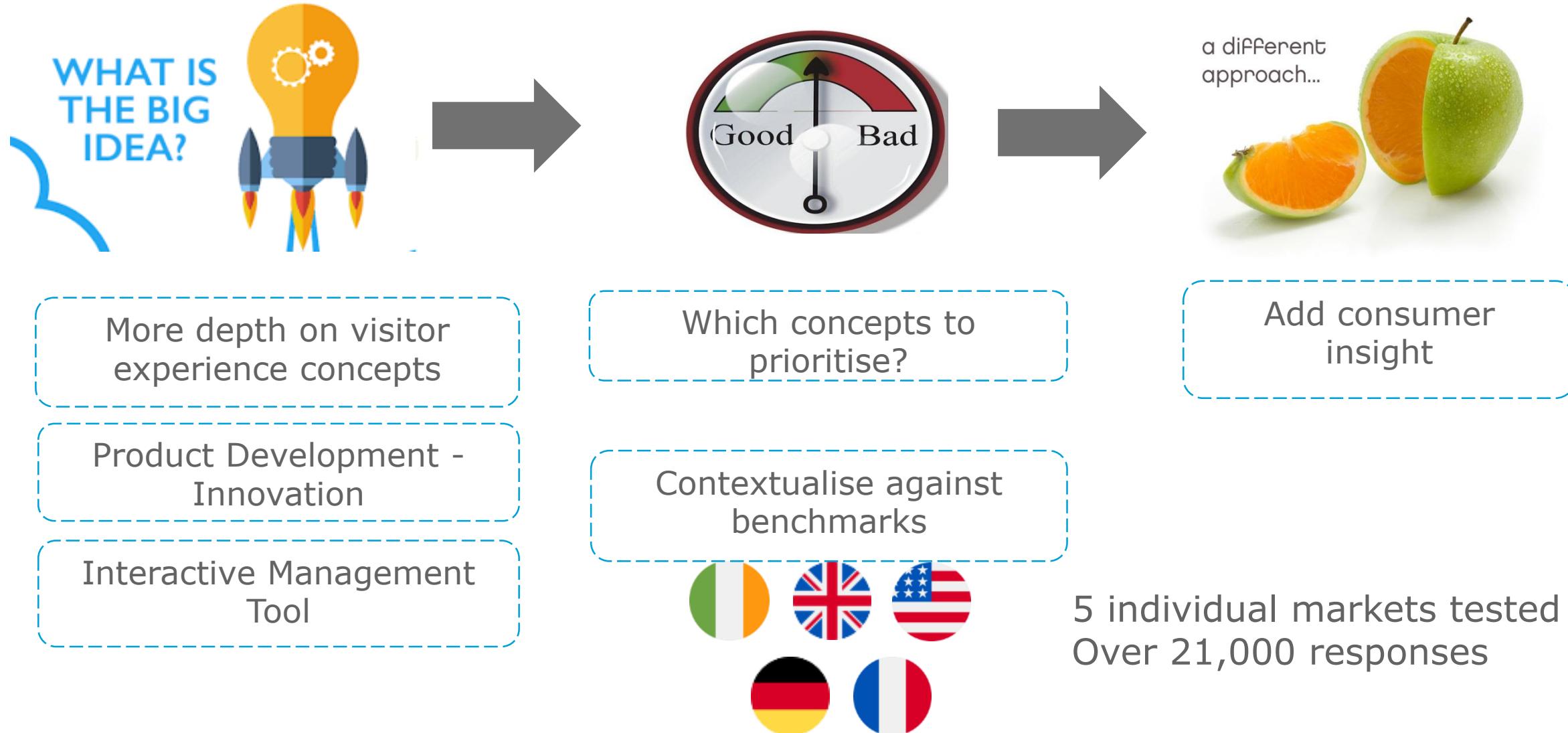


A Demand Side Perspective: Testing Tourism Concepts



CAEMAN WALL

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- Online **consumer testing** methodology - test consumer reaction before further development of idea/concept
- Respondents (**potential holidaymakers**) review a tourism concept and test it under a number of criteria
- **Consideration** as a holiday choice (in next 3 years) primary test - taking into account cultural and market norms
- **Developmental Tool**: Whole host of diagnostic tools that provide a understanding as to why an experience performed well, or indeed under performed
- **Inform decision making**: identifying whether this concept/experience will motivate travel



It's a methodology utilised by FMCG companies for their New Product Development and modified for tourism

CONCEPT STIMULUS: TIERED APPROACH

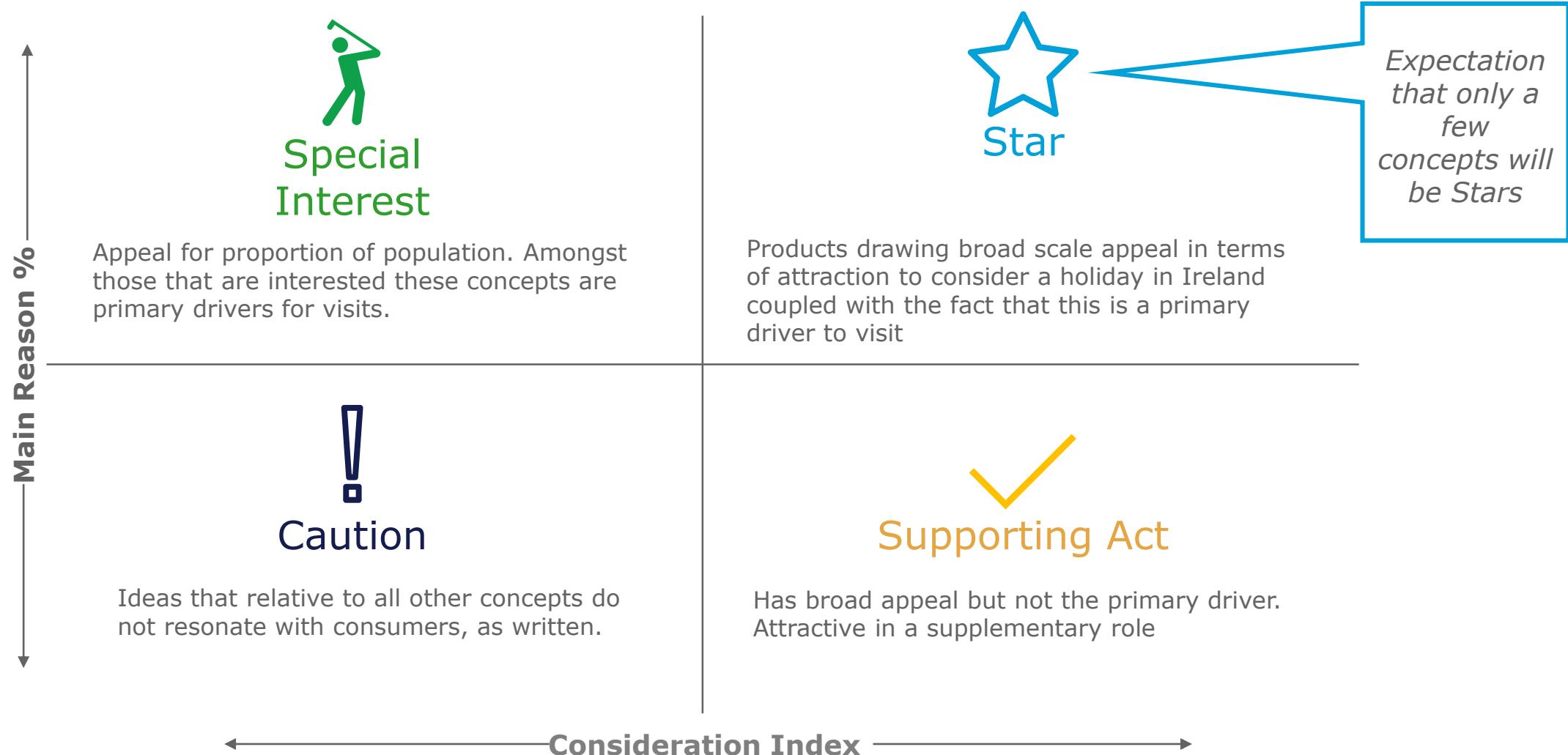


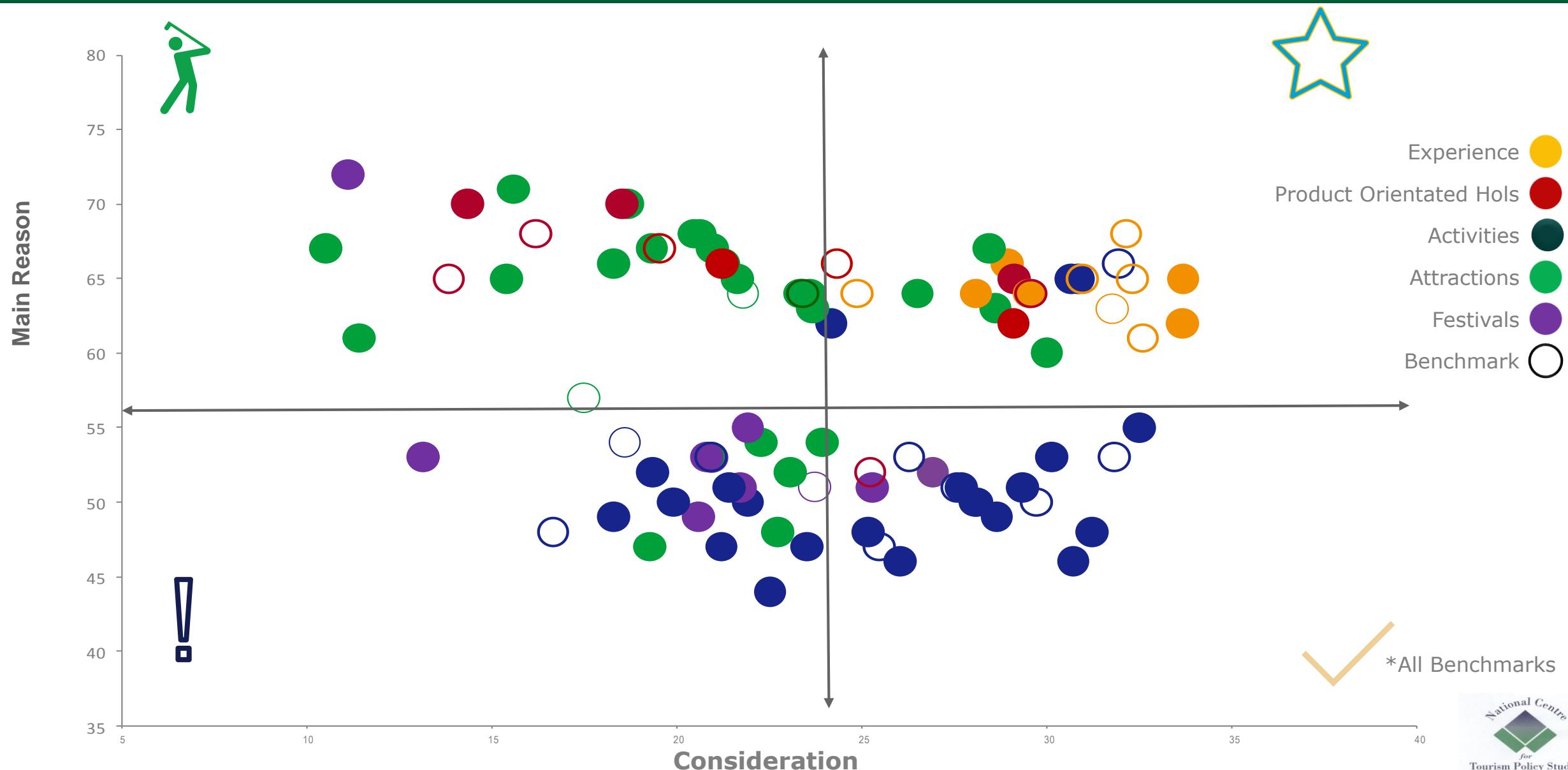
71 Concepts
28 Benchmarks [5 Irish, 23 Intl]

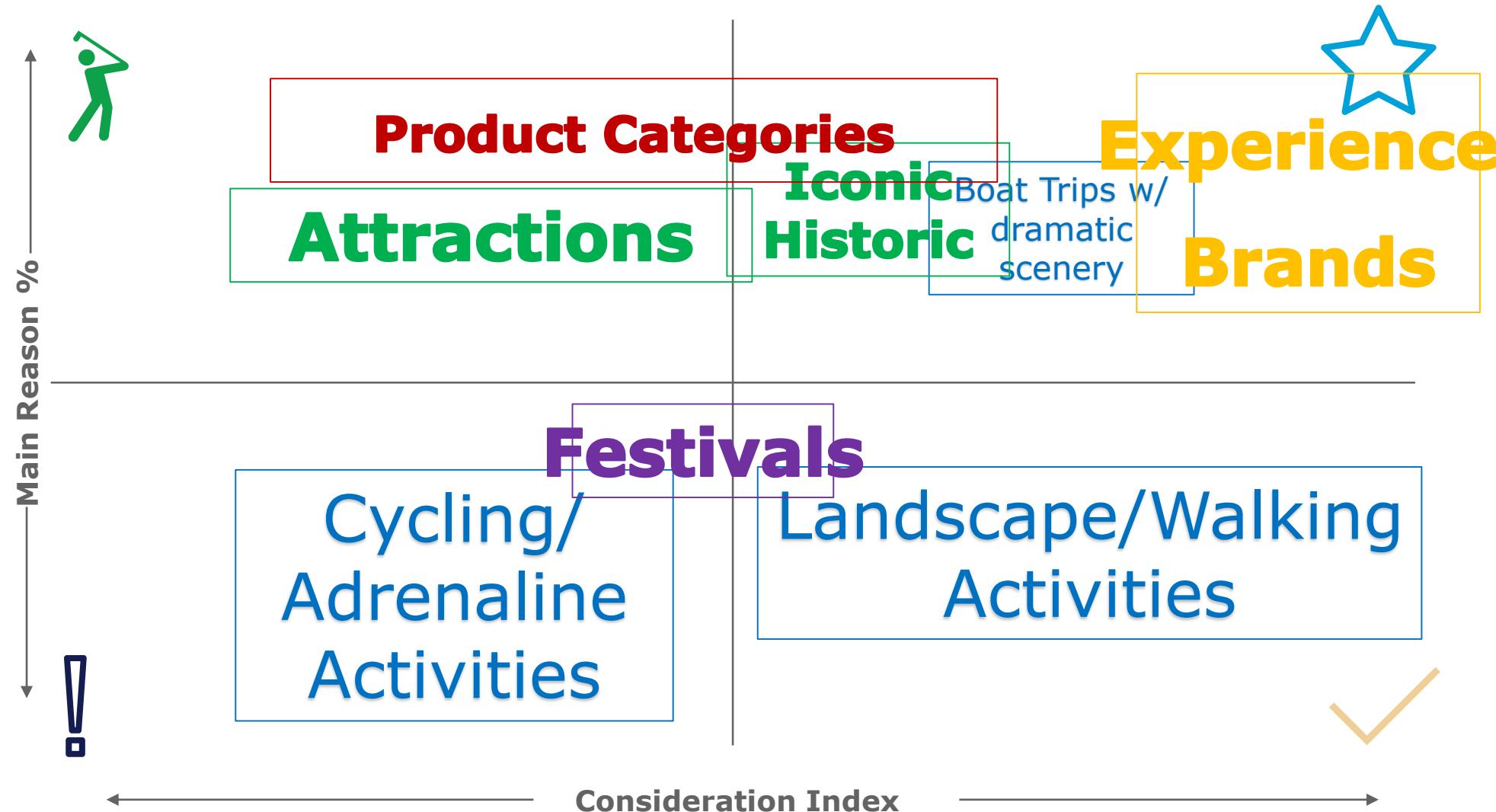
Overall Findings

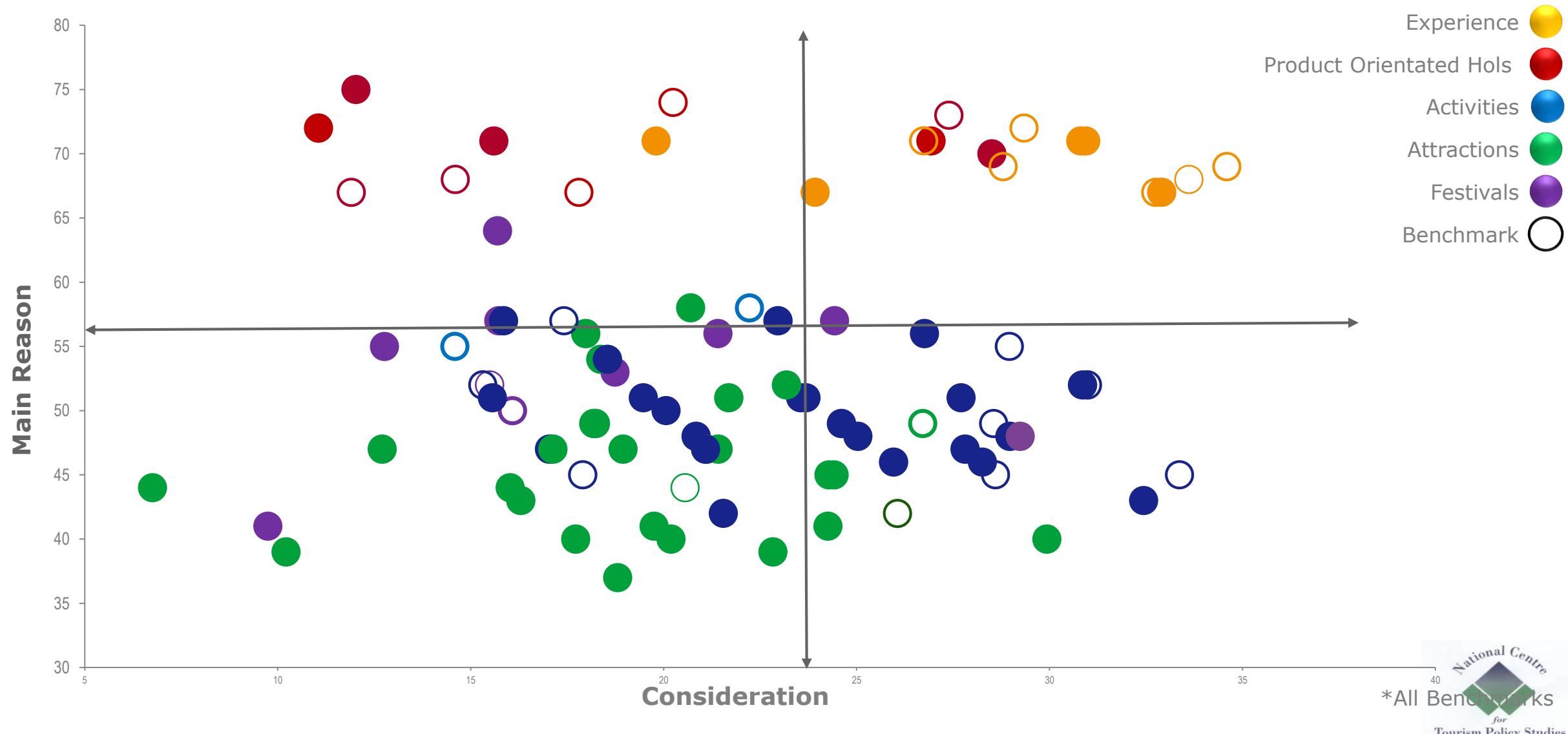


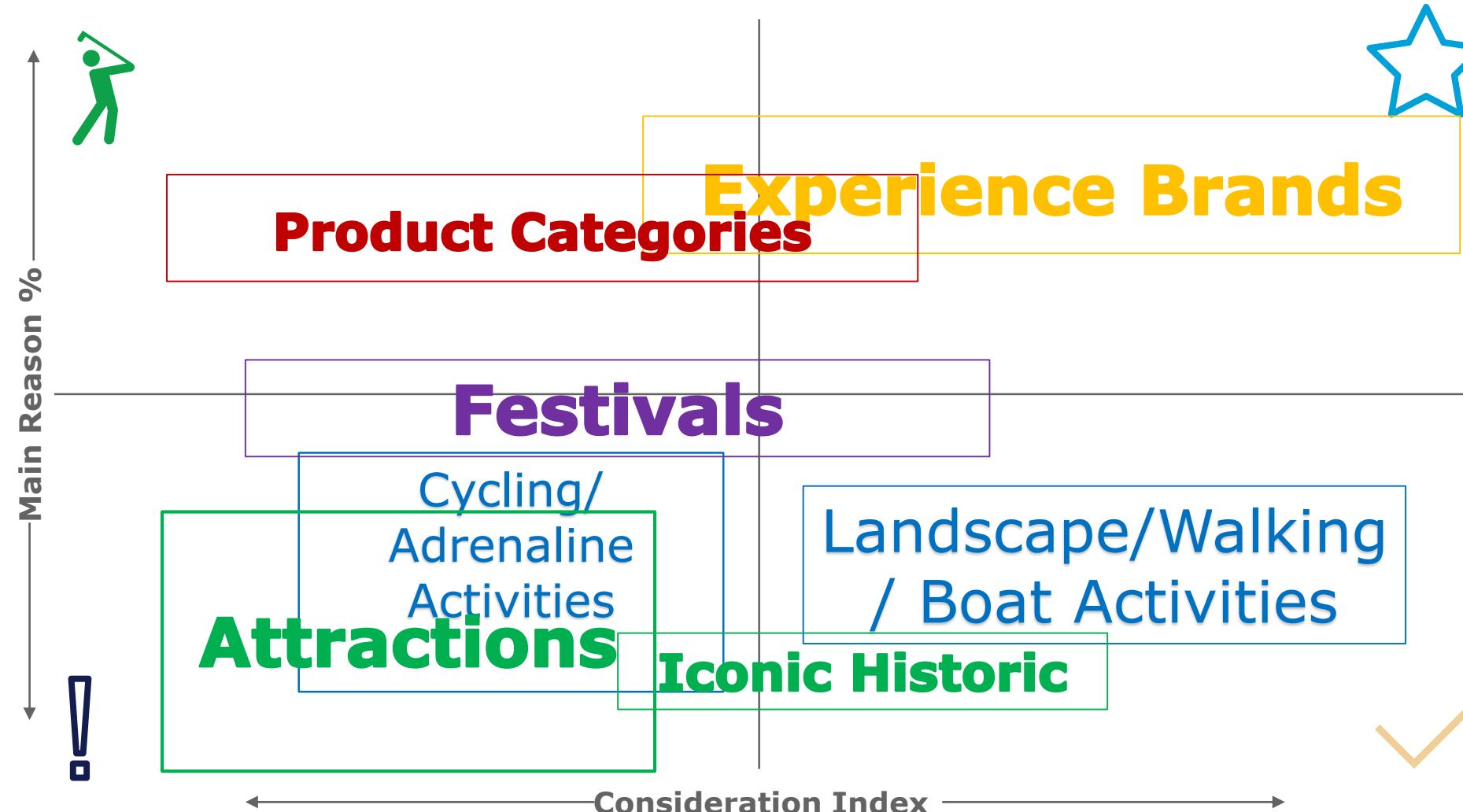
GRIDPLOT: - Consideration index vs. main reason to visit

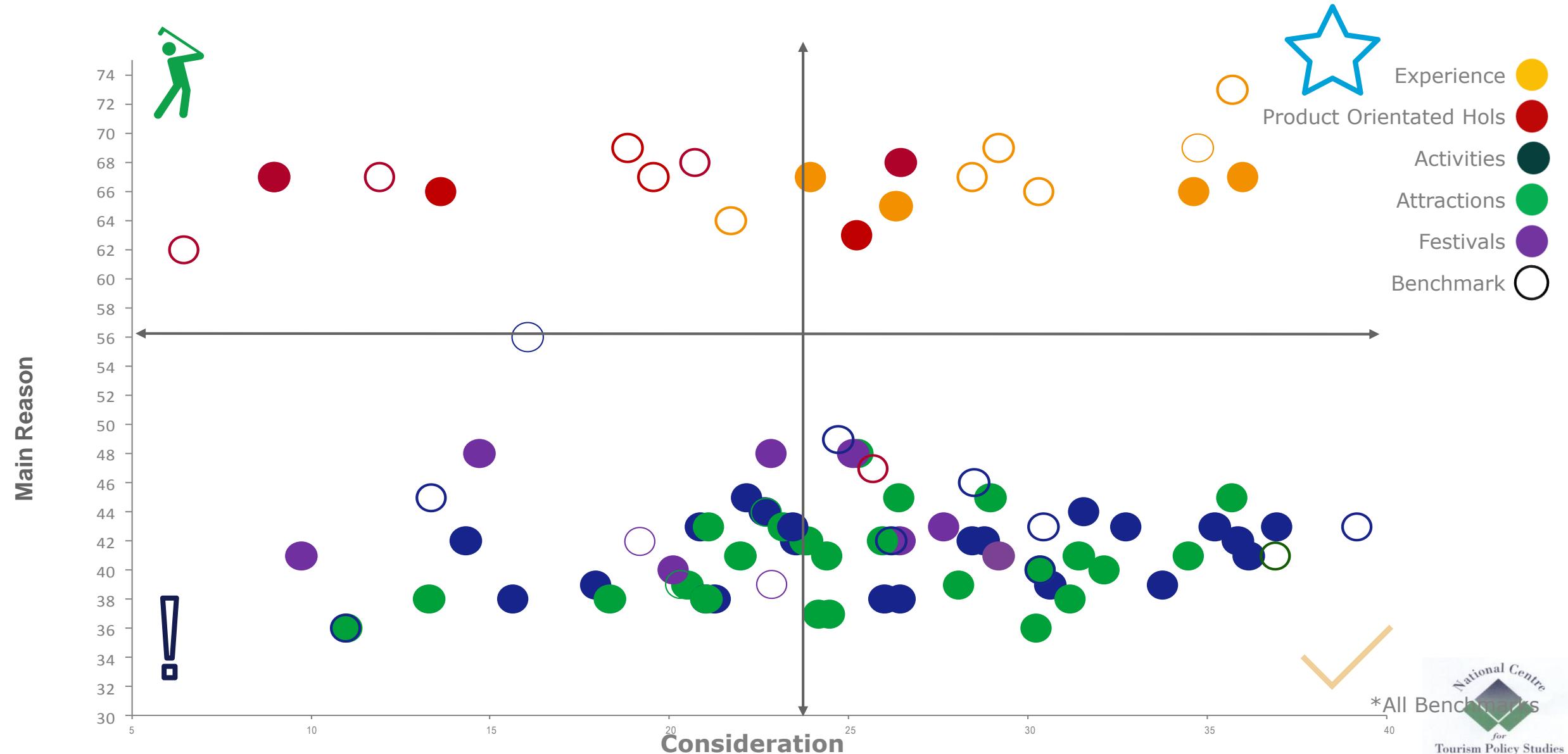


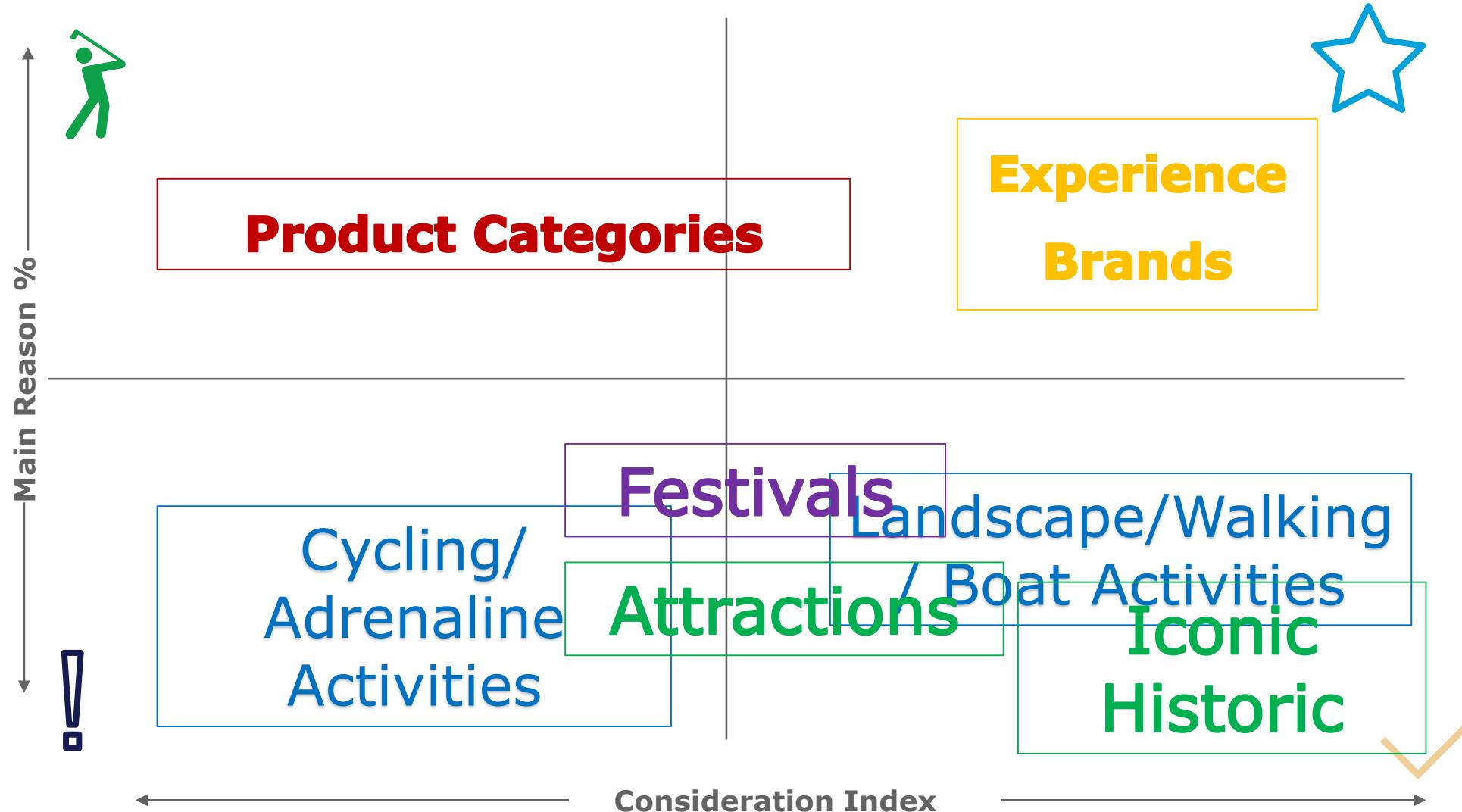












Category Review

- ❖ Brand Architecture holds true – Experience Brands are most important in driving holiday consideration and motivating travel
- ❖ Iconic historic and coastal boat trips with dramatic scenery drive travel
- ❖ Attractions generally perform well in motivating travel – especially iconic historic, others have more niche appeal
- ❖ Activities hold a strong supporting role - mass market appeal for consideration
 - Activities are a means to engage with landscape
 - Cycling has niche appeal & watersports and 'adrenaline' are for the select few

General Overview

- ❖ Close proximity and presence of a similar product domestically reduces the level of consideration to a concept
- ❖ The top performing concepts overall centre overwhelmingly on landscape: consumers have an emotional and romantic attachment to engaging in Ireland's natural beauty
[*Maritime coastal experiences have a consistently strong appeal*]
- ❖ Iconic Historic experiences set Ireland apart
- ❖ Experiences in Nature and those that involve walking as means of experience the landscape are top performing of all activities