

SAXION UNIVERSITY OF APPLIED SCIENCES



Sensational!



Looking into the Brazilian Market

A Product plan for the Zambia Tourism Agency

Graduation Thesis

RETAKE

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Deventer, August 2016

First examiner: Ms. Inge Gijssbers

Second examiner: Mr. Adriaan Kauffmann

Client: Ms. Doris Kofi

Company: Zambia Tourism Agency

RETAKE

This is a retake. All parts changed are marked with yellow. The main improvement points are stated as follow:

Introduction:

Zambia is better introduced as a tourism destination. Better explained why Brazil. Research and advice objectives better defined and linked to other parts from the thesis

Theoretical Framework:

New sources. Only academic sources used. Operationalization of tourism system is back. Order of core concepts updated. Better linked to other chapters of the thesis

Methodology:

Written in a more logical order. Data collection methods, sampling plan and analysis better explained. Chapter is organized and better to read.

Results:

New questions added answered by desk research about luxury tourism and product development. Chapter is reduced and many less relevant information was sent into appendix. Results are better linked to other parts of the thesis.

In the conclusion the SWOT was left out, questions better answered.

Discussion:

No significant changes

Advise:

The Advice was totally changed in order to match the research results and the thesis objectives. Now it is more clear that it is a product plan and UNWTO handbook on product development was used as reference to structure the advice. Time, people and money was used as criteria to create different scenarios. Financial part is more specific.

Afterword:

More specific on how does this assignment can add value to the industry

Foreword

Following the guidelines for a thesis project from the Tourism Management Course at Saxion University, this report will serve as a first step looking into Brazil as a potential source market for the Zambia Tourism Agency (ZTA).

As mentioned in the front page, this thesis was assessed by Ms Inge Gijsbers and Mr Adriaan Kauffmann as first and second examiners and by Ms Doris Kofi from the ZTA. During the whole process there was constant contact with the first examiner and Ms Kofi.

This project was only made possible thanks to all the support received from Saxion teachers, who showed Zambia as a destination in the course Destination Development and introduced me to the Zambia Tourism Agency. I also thank friends and relatives, who supported me all the way with positive motivation.

Robbert van Hattem
Deventer, Netherlands
August, 2016

Executive summary

Despite the current recession, Brazilian outbound travel continues strong. Long-haul travel beyond South America tripled between 2002 and 2012. When travels to Africa are taken into consideration, the preferred destination is South Africa. Between 2003 and 2008, 150,188 Brazilians travelled to South Africa, contributing with R1.5 billion (above US\$ 94 million) to the country's economy. Zambia is however not recognised yet as a popular tourist destination in Brazil. The few travellers from Brazil, who visited Zambia, did it in combination with other destinations, always including South Africa in their trips. Moreover, all flights to Zambia, departing from Brazil, have a stopover in South Africa. According to the South African Tourism board, only 2.8 percent of the arrivals in South Africa were of travellers who also visited Zambia.

With the depreciation of the Brazilian Real, there is a search for destinations who also have a depreciated currency. Inbound tourism grew in Brazil and, despite the decline of the outbound tourism, there is still great potential for this emerging country with plenty people who love travelling.

There is no direct flight departing from Brazil to Zambia. Flights to Africa are either departing from São Paulo (Brazil) or Buenos Aires (Argentina), with a stop in Johannesburg (South Africa). There are daily flights from São Paulo to Johannesburg with South African Airways.

The image of Africa in Brazil is directly connected to South Africa, as Brazilians barely know about other countries in the continent. There is a hidden potential in other countries as Zambia and, therefore, there is an image to be build. One reason for that could be the non-visa requirement for Brazilians travelling to South Africa. The fact that Zambia does require a visa for Brazilian travellers could be a threat to Zambia, reducing travellers' arrivals in the country. On the other hand, it could turn Zambia into a more exclusive destination.

The national travel and tourism office of the USA indicates that in Brazil 50% of the travellers book their trips through travel agencies. The USA is the preferred destination of the Brazilian market. Regarding trips to other destinations, booking through a travel agency is expected to be even higher in percentage, especially when considering new destinations. Brazilians like to feel safe when booking a trip and a travel agent gives the traveller an extra safety feeling. This makes travel agencies important distribution channels in Brazil. Social Media also play a very important role in Brazilians' lives. Travellers like to share their trips on sites like Facebook, Twitter or even in WhatsApp groups.

Brazil is still considered an emerging market. However, there is a trend for new destinations arising, in which South Africa is not everything one is looking for in Africa anymore and a trend in which there will be a constant search for new experiences and new destinations. Zambia should look into this market and give the first step, before its competitors.

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1. General introduction

Zambia is a developing country with a great potential for tourism. (The World Bank, 2011) Miriamimba states that "Zambia's tourism potential can best be described as a sleeping tourism giant, as evidenced by the vast land, waters, and wildlife, most of which is still in its pristine nature and, if tapped, could lead to the country becoming the tourism hub of Southern Africa." (Zimba M. , 2011). She works for the Ministry of Labour and Social Security in Zambia. Moreover, according to the report from The World Bank, "Zambia has the natural resources and other tourism assets needed to attract a significantly larger number of tourists." (The World Bank, 2011) It states that Zambia need to be further developed with tourism and can be well developed.

Since 2011, a new slogan for the tourism brand was created in Zambia. At that moment, it was acknowledged that tourism in Zambia is a key sector in the Government's objectives of increasing economic growth and reducing poverty in the country. With the slogan "Let's explore" the country expects to attract more tourists and to obtain a competitive position in the market.

1.1. About the Client

ZTA is the client for this thesis. "The Zambia Tourism Agency (ZTA), formerly Zambia Tourism Board (ZTB), is a vibrant and dynamic statutory body mandated to promote and market Zambia as a tourist destination of choice, both locally and abroad." (ZTA, 2016). ZTA is operating since 2015 and it works as a Destination Marketing Organization (DMO). The agency has the "responsibility of promoting Zambia as a top eco-tourism destination in Southern Africa. Its main activities include participation at select trade and consumer shows trade and media familiarisation tours and the provision of information about areas of tourism interest in Zambia as well as investment opportunities available." (Atta, 2015). In other words, the ZTA is the official organisation that promotes Zambia to become a more attractive and competitive tourist destination. Ms Kofi mentioned, "The Agency was established through an Act of Parliament in 2015 with the purpose to promote and market Zambia as a tourist destination within and outside Zambia and to regulate the tourism industry in Zambia." (Kofi, 2016). She is the contact person within this assignment.

Ms Kofi is Senior Marketing manager at ZTA since 2011 and she has nine years of experience as Tourism Promotion manager and Public Relations Officer at the Zambian National Tourist Board. Ms Kofi is responsible for supervising this thesis' project. She is the main contact person from whom information about Zambia was collected. Besides working in marketing and PR at the ZTA, Ms Kofi also worked four years as travel consultant at ADF Travel and Tours. She is Zambian and is a native English speaker. Ms Kofi stated in a meeting that ZTA has deep interest on attracting new markets in order to increase high-spenders' arrivals, which goes hand in hand with ZTA's vision and mission.

The ZTA Vision is "To be a dynamic and effective organisation in the promotion and marketing of Zambia's tourism." (ZTA, 2016). Moreover, the mission is to "Effectively and efficiently promote and market Zambia as a tourist destination of choice locally and internationally in partnership with industry players in order to contribute to sustainable economic growth" (ZTA, 2016).

1.2. Reasoning behind the Thesis

According to The World Bank report, "Zambia faces increased competition from its regional neighbours – and this is expected to intensify" (The World Bank, 2011, p. 2). The biggest competition is coming from South Africa in the SADC region. It took 44 percent of the arrivals. Other major competitors

in the developed community are Botswana, Tanzania and Namibia respectively. Moreover, the country that shares Victoria Falls with Zambia is also the one cannot be overlooked– Zimbabwe. It could offer similar products as Zambia like nature oriented, yet better developed and good priced. More than that, Zimbabwe has more skill-based infrastructure that it could benefit from. Not finding a new market or doing a better product development means Zambia's market share will be squeezed out by its competitors in the end. At this moment, luxury hotels are facing difficulties with low occupancy rates and Zambia has the structure to receive more travellers, being below its caring capacity. From those factors, ZTA feels the urge to expend its market towards new markets.

As mentioned before, the ZTA wants to increase the number of high spender tourists in Zambia. They could contribute better for the economic growth of the country. Zambia's government believes that tourism, if well planned, is sustainable, improving the economy of the country and maintaining the natural resources. Ms Kofi also stated that ZTA wants focus on high spender sections. They think mass tourism is not an option for Zambia. Therefore, a luxury, niche segment had gone into the target range.

After Skype meeting with Ms Kofi, clearer idea had been formed. Ms Kofi wants to focus on the countries that are world top spenders. The data is from the UNWTO (United Nations World Tourism Organization) (Appendix I). Those countries who made to this list are potential ZTA's targets. Based on that list, it was agreed with Ms. Kofi that this research should focus only on the Brazilian market. This, because either the ZTA has already information about the other countries on the list or the language barrier in those other countries (e.g. Russian in Russia) would make it difficult for the researcher to do a proper marketing research (Brazilian Portuguese is, after all, the mother tongue of the researcher). Moreover, given the time limitations, it is not possible to focus in more than one of the featured countries.

According to desk research, "more and more Brazilians are traveling abroad. With 8 million traveling abroad in 2012, outbound Brazilian tourism actually exceeds inbound tourism. It is amusing to think that years ago many countries were worried about illegal Brazilian immigrants, today they worry about attracting the Brazilian traveller." (TIES, 2014). Other findings are as followed:

- Brazilians have the cultural motivators. it has long been associated with the desire to learn about foreign countries like to try new destinations, Zambia is not familiar for them yet
- Brazilians have 43 days of leave entitlement that means they could have longer stay at Zambia. (Euromonitor, 2011, p. 207)
- Outgoing tourism expenditure from Brazil is growing dramatically every year (Euromonitor, 2011, p. 210)

Ms Kofi explains that Zambia wants to attract upper market travellers and would like to know more about the Brazilian luxury market. Right now, she knows almost nothing about the Brazilian market.

The visitors coming from Brazil are not even being recorded into Zambia tourism statistics. The only available numbers of arrivals originating from Brazil is counted are those who come together with those registered for the whole South America continent. ZTA does not have much information about the country. Yet Brazil could be golden playground for Zambia. Further research was needed in order to answer this question

Because the ZTA aims at attracting more high spenders to Zambia, therefore the thesis topic will be highly focused on Brazilian high spenders and matching products from Zambia. Research about Zambia and its products is also needed in order to identify a possible match between product and demand. The outcome that Ms Kofi wants from this project is an overview about the Brazilian luxury

market, with its needs and wants and what kind of products could Zambia offer to it. The ZTA would like to know whom to target in Brazil and what to offer to them. In other words: getting to know, to what extent there will be such a match, would be an excellent input for the ZTA to position Zambia in Brazil and to make possible the income growth from tourism market.

All in all, the management issue is:

"How can the ZTA best segment the Brazilian luxury travel market into different target groups in order to offer the right tourism products that matches the needs and wants of these groups?".

1.3. Research and Advice Objectives and Questions

Based on the above mentioned management issue, the objective of this research is:

"To find information about the Brazilian luxury travel market as well as the needs and wants from particular segments within this market. Moreover, an overview of the current tourism products' availability in Zambia should be presented."

After set up the objective of the researcher then its turn for the objective of the advice. It is:

"To elaborate on which tourism products should the ZTA use in their portfolio, matching needs and wants from Brazilian luxurious travellers from specific target groups. This will be done by presenting a product plan."

And the advice questions as below:

- In which target groups of the Brazilian luxury travel market should the ZTA focus on?
- Which tourism products should the ZTA offer to these Brazilian luxury target groups?

Research is needed before presenting any advices and giving answers to the management problem. In the next chapter, an overview of the research questions will be presented. Moreover, methods used in order to answer these questions are explained and elaborated.

2. Theoretical Framework

Based on the above-mentioned research and advice objectives, a few core concepts has been chosen: "luxury tourism", "The tourism system", "market research" and "marketing segmentation and targeting". Luxury tourism, to begin with, can help define what are the characteristics about that market, who are those people, etc. Then the basic tone "luxury" can be properly defined. Everything analysed later will have connection to the concept "luxury". "Tourism system" as a concept can help to analyse the tourism products and the elements needed to be analysed in the supply and demand sides, as in the end this thesis needs to provide a match between supply and demand. The next step refers to the market research and, more specifically, kind of research is more suitable for the objective of this research. Last but not least, market segmentation and targeting. By using well these concepts, this thesis will be able to present who is the right segment to target on for matching the tourism product according to the analysed elements from demand and supply sides." In this chapter, these concepts are defined and operationalised. The theoretical framework or "conceptual framework is a structure that seeks to identify and present, in a logical format, the key factors relating to the phenomena under investigation." (Brotherton, Researching Hospitality and Tourism, 2008, p. 78). Moreover, it "serves to establish a logical connection between the existing body of knowledge and the view knowledge your research is trying to generate." (Brotherton, Researching Hospitality and Tourism, 2008, p. 79). Even though sometimes the framework is not directly connected to any research question, these definitions and operationalisations provide all the necessary information relevant for the research.

2. 1. Luxury tourism

Klaus Heine (2011) defines luxury “as something desirable and more than a necessity.” The concept is “relative depending on the cultural, economic or regional contexts, which transform luxury into an ambiguous concept.” (Low, 2010) This concept thus depends on individuals and time. However, “luxury has been a sign of prosperity, power and social status since ancient times.” (Kapferer and Basten 2010) (cited in Gardetti & Torres, 2015, p. 2). A normal comfortable tourism product cannot be classified as luxurious if there is no unique selling point. According to Berghaus et al. (2014) within luxury “there are six facets: excellent quality, premium price, scarcity and uniqueness, aesthetics and poly-sensuality; ancestral heritage and personal history, and super-fluosity.” (p. 73)

Horwarth (2011) mentions that “luxury travel is partly socio-demographic and partly lifestyle in nature.” Moreover, “the luxury travel market is a segment of domestic and international tourism markets that seeks exclusivity and social distinction and this has a price dimension.” (cited in Morrison A. M., 2013, p. 447) However, there are limited academic resources about what is luxury tourism. Few precious statistics have ever been published on its characteristics (Morrison A. M., 2013, p. 447) a more detailed desk research about what is the meaning of Luxury Tourism will be conducted in the Method Chapter – Desk research.

Regarding the core concept definition from Morrison (2013), a number of variables appear. The price dimension, to start with. Luxury refers to extremes in terms of price:

- High price points help maintain exclusivity for affluent customers.
- While luxury travellers will pay a premium price for top quality, value is a key consideration.
- Social distinction remains important in the luxury sector.

(Morrison A. M., 2013, p. 447)

In other words, if one destination product has a high price, then accordingly some elements like exclusivity, top quality, or privacy should come along.

For this thesis, tourism products and targeted segments are related to the term luxury. Therefore, what is luxury needs to be better elaborated. In addition, every research is done taking into account the term luxury. Before defining who are the luxury travellers and what are their characteristics or what is the tourism product from Zambia, the focus will be on what luxury market is and what dimensions this market has. A more in-depth desk research will give the answers which readers will find in the Methodology section.

2. 2. The Tourism System

According to Baloglu (2011), tourism marketing has as main goal to link the supply and demand sides. It is essential for the destination marketing to understand traveller's characteristics, perception and images, positioning, tourist experiences and behaviours as well as trends on the demand side. (p. 14) According to Morrison (2013), the tourism product consists of physical products in the destination mix, plus people, packages and programs.” (p. 13) Those aspects of the destination product are related to the roles of product development. In the following paragraphs, the important elements from the demand and supply sides are presented.

Due to the objectives of the research and advice, analysing the demand and supply sides is important. Weaver & Lawton (2006), for example, argue that, “Broad categories commonly associated

with the tourism industry include accommodation, transportation, food and beverage, tour operations, travel agencies, commercial attractions and merchandising of souvenirs and other goods purchased mainly by tourists.” (p. 47). However, this term is still too broad – or not too focused – for this thesis. A more specific term is needed, in order to separate the demand side from the supply side. As mentioned above, “Tourism marketing’s main role is to systematically link supply and demand ... On the supply side, attractions, facilities, services, people (employees and residents), internal marketing and brand identity strategies and tactics all are marketing domain.” (Kozak & Baloglu, 2011, p. 14) Moreover “On demand side, understanding travellers’ characteristics, perception and images, positioning, tourist experiences and behaviour as well as market trends are central to strategic place or destination marketing.” (Kozak & Baloglu, 2011, p. 14). Murphy (2013) argues that “from the demand side, there are four travel motivators. They are physical, cultural, social and fantasy motivators.” (p. 10) Those motivations form correspondingly the elements from the supply side. There are “facilities, accessibility, infrastructure, attractions and hospitality.” (p. 10) Witt & Moutinho (1995) call the demand side of the tourism system “The generating system” and the supply side “The receiving system” (p. 14). “Basically a tourism destination is a geographic area that attracts visitors.” (Morrison A. M., 2013, p. 4). Morrison (2013) mentions six elements as the destination tourism product or destination mix: “attractions and events, facilities, transportation, infrastructure and hospitality resources.” (p. 7) Taking into consideration that this is not a marketing plan and that this research is about luxury market, not every definition above fits the research objective completely.

Based on the ideas above, a further research continued: “The tourism system includes accommodation facilities, tourist attraction sites, restaurants, entertainment, transportation and local inhabitants on the supply side and customers (visitors and travel agencies) on the demand side.” (Kozak & Baloglu, 2011, p. 52). The demand side is analysed according to the elements from the supply side, the destination tourism product. It is a match between the target segment and current luxury travel products from Zambia.

It is important to have this clear because these elements are going to be essential in the research. Desk research, interview guide and more were conducted considering those elements. Comparing the actual tourism products on the supply side with the needs and wants on the demand side is sufficient to understand whether the destination has the right products that the travellers are looking for. In other words, it shows to what extent there is a match between the supply and demand sides. A more informative picture can be seen on appendix 23. It gives a **visualisation** establishing the relationship between the demand and supply sides. With the tourism system, the elements are defined. Then a market research comes into the picture. The market research would mainly collect data from those defined elements from both sides, by different means, as will be seen in the next core concept.

2. 3. Market Research

It is known that “All markets are made of buyers who have different needs and wants, and different buying habits and buying frequencies.” (George, 2014, p. 167) Therefore, “it is imperative that marketers identify their target market carefully so that they understand who the right person is the target for their marketing activities.” In order to do a good job on the segmentation, a thorough market research is needed to profile market segment. (Hague, Hague, & Morgan, 2004) For this thesis, it took less demanding research – unstructured interviews, desk research and more.

In this thesis, analysing the Brazilian target market is crucial. Therefore, market research, market segmentation and targeting were chosen as core concepts.

The market research is “applied research, which is undertaken to answer a specific question.” (George, 2014, p. 118) It is different from the marketing research, which “consists of all of the research (including secondary research and competitor analysis), that helps the tourism marketer in making marketing decisions.” (George, 2014, p. 118) Market research is a small part of marketing research; however, it is sufficient for this thesis due to the fact that this is not a marketing plan but a product plan. Hague et al. (2004) argue that market research is “the systematic collection, analysis and interpretation of information relevant to marketing decisions.” Moreover, “market research can find new territories for products or services.” (p. 4)

In this thesis, the main purpose of market research is to find the characteristics about Brazilian target market and needs and wants from targeted segments, besides the destination tourism product from the supply side.

The elements that needed to be analysed related to the tourism product were defined, and, accordingly, the needs and wants from the demand side were also researched. By segmenting luxury market into more specific smaller groups, ZTA could decide to which group and what tourism product it could possibly provide.

2. 4. Market Segmentation and market targeting

Marketing segmentation is essential for this work. “Marketing segmentation is an important element of a marketing strategy.” (Witt & Moutinho, 1995) Hence, the definition: “Market segmentation, as stated, divides the total tourist population into smaller, relatively homogeneous subgroups that can be catered to or managed as separate market segments.” (Weaver & Lawton, 2006, p. 175) Brazilian customers from luxury market could react differently toward the tourism products that Zambia provide. Therefore, segmenting them into different groups would make the reaction more controllable and predictable. Moreover, the product towards one group could be the same as it differ if provided to different segments.

Knowing what the Zambian market mix (the supply side) is composed of, and what are the characteristics of the segment, is essential for writing this plan. The aim of this thesis is to indicate which products and services Zambia can provide (Zambia as a destination) to the demand side (Brazilian travellers). For that, the needs and wants of the Brazilian targeted customers should be known. In order to discover to what extent there is a match between the supply and demand sides, market segmentation plays an important role.

“Consumer purchase are strongly influenced by the people with whom consumers work, live and socialise.” (George, 2014, p. 168) For Zambia, it is better to target people who share the similar behaviour and attitude towards their particular offer. Therefore, Zambia should “divide a market into clearly defined groups of buyers who share similar needs, characteristics or behaviours patterns and might require separate products or marketing programs.” (George, 2014, p. 168) It is also considered “wasteful for a DMO to go after everyone in the market.” (Morrison A. M., 2013, p. 71) One of the research objectives is to find out the wants and needs from the target customers. By segmenting, the market can indeed “help define customer needs and wants.” (George, 2014, p. 169).

There are several ways to segment a market. A good segmentation should use different segmentation methods. “Sometimes, it may be appropriate to use one variable. At other times, it is better to use a combination of variables. Those combinations are called multi- variables.” (George, 2014, p. 169). Due to the complexity of the Brazilian market, the segmentation would be using different variables.

Doing well the market segmentation strategies can cover a wide range of consumer characteristics. It could easily define “the basic demographics like age, race, or gender, for example.” Other qualities, “like educational background or income can also be used, as can location. Some of the potentially most powerful variables by which to segment a market are behavioural ones, including social class, lifestyle, and interests.” (Tatum, 2016) These definitions highlight that market segmentation is supposed to divide customers into similar groups. “Dividing the market into groups based on where consumers come from” maybe is the most common way to segment. It is called geographic segmentation and it is one of the variables. “It divides the market according to different geographical factors or areas such as regions countries, provinces, cities, neighbourhoods or suburbs, city or metro size and climate.” (George, 2014, p. 170) However, only depending on geographic segment is not enough. For example, not all the people from the southern region of Brazil afford luxury travelling. The segment needs to be divided more in depth with the help with other variables. For instant, demographic segmentation, which “involves dividing a market into groups based on variables such as gender, age, family size, income and life cycle stage (family circumstances), occupation, education, religion, race, generation and nationality.” (George, 2014, p. 172) Only those two variables are also not enough. For example, people who in the same demographic group can have very different psychographic profile. Therefore, psychographic segmentation is needed. It involves “personality, life style and social class” and those cause the belief that “common values can be found among groups of consumers and that these values tend to determine their purchasing patterns.” (George, 2014, p. 175) George (2014) also points out that “Psychographic segmentation divides a market into different groups based on social class, personality or life style factors.” (p. 175)

For this thesis, three of the most common segmentation elements were chosen. Namely: geographic, demographic and psychographic segmentation. Kotler, Bowen and Makens (2009) mention that “The strategy of market segmentation seeks to achieve competitive advantage by focusing on a specific type of customer segment and designing the existing products and services according to their values or socio-economic and socio-demographic characteristic.” (As cited in Kozak & Baloglu, 2011, p. 139). The segmentation could then be done by analysing the geographic, demographic and psychographic characteristics of the Brazilian market. These characteristics would be specified and analysed as below:

Figure3: Market segmentation

Geographic :	Demographic:	Psychographic:
City	Age	Attitude
Climate	Income	Life style
	Life Cycle	Social Class
	Occupation	Interest

Source: Adapted from Kozak & Baloglu (2011)

Smith first identified the concept of market segmentation back in the 1950s. He was one of the first to recognize the importance of market segmentation, as shown in the following quote: “Market segmentation is based upon developments on the demand side of the market and represents a rational and more precise adjustment of product and marketing effort to consumer or user requirements.” (Smith W. R., 1956, p. 3) To make it easy to understand, the market segmentation is an important tool to enable marketers to better meet customer needs.

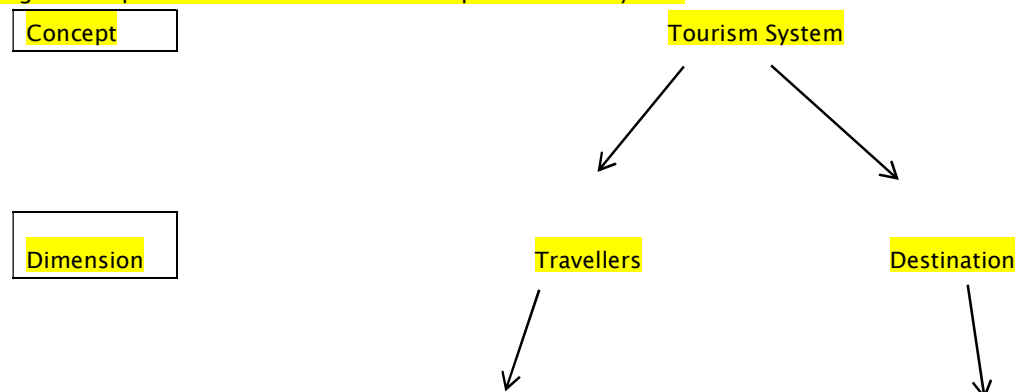
After market segmentation, the next concept is "market targeting". "It is the process of evaluating each segments attractiveness (its size and growth rate), select one or more of the market segments and designing different strategies to reach each segment selected." (George, 2014, p. 187) There are four different strategies to approach target segment: niche marketing, differentiated marketing, undifferentiated marketing, and customised marketing. Choosing the right strategy depends largely on the characteristics of the targeted segment. Therefore, market segmentation is always being conducted earlier than market targeting.

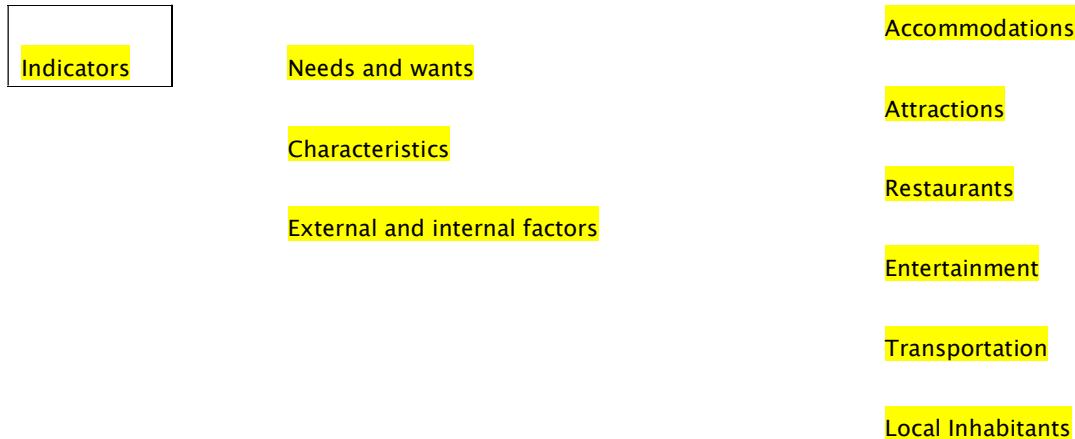
2. 5. Relationship among Core Concepts

The objective of this thesis is linked to the management issue, which is: "How can the ZTA best segment the Brazilian luxury travel market into different target groups in order to offer the right tourism products that matches the needs and wants of these groups?". There are two big blocks which are: how to best segment them and what would be the right product for them. The researcher set those two as constructs, and from the construct, the researcher developed the concept in order to make the connection. Because the fact the constructs and concepts are abstract inventions and combined with many elements, the researcher needed to convert them or translate them into more specific and concrete terms. This is known as 'operationalising' the concepts. These were presented above. Another element stated above are the variables, which are also used to accomplish the translation.

The conceptual framework is used to present a causal relation, cause-effect, link between factors. As the whole purpose of this thesis is related to segmenting and targeting the Brazilian luxury market and provide the suitable destination products, a few core concepts were discussed. Firstly, it was important to know which elements compose of luxury tourism. These elements should serve to set a base for the research. Everything that being searched are under the term luxury. Then the concept of tourism system came in. From that concept, a demand and supply relationship and research elements is set. The operationalization can be find below (Figure 2). Next, it comes to research, another concept market research was introduced. It set the idea on how and what to research for the tourism system under the term luxury. Finally yet importantly, the market segmentation and targeting as core concept. It set important and relevant researching elements. Market segmentation involves identify criteria for segmenting the market, develop segment profiles. And market targeting includes assess segment attractiveness, select the target market segments. Those core concepts all together being conducted could answer the objectives of the research.

Figure 2: Operationalization of core concept – Tourism System





3. Research Methodology

3.1. Research Questions

In order to answer to the management issue: “How can the ZTA best segment the Brazilian luxury travel market into different target groups in order to offer the right tourism products that matches the needs and wants of these groups?”, the following research question and sub questions were elaborated:

Central research question:

- To what extent do the needs and wants of the Brazilian luxury travel segment match with the current luxury tourism products of Zambia?

Sub-questions:

1. Which luxury tourism products does Zambia offer?
2. What are the characteristics of the Brazilian luxury travel market?
3. What are the needs and wants of the Brazilian luxury travel market?
4. What are the trends and developments of the Brazilian luxury travel market?

Other important questions:

- What is luxury tourism?
- How to use Product development as a management tool?

3.2. Justification:

The central research question has the purpose of linking the supply with the demand sides of the tourism system. As seen at the operationalization of core concepts, the supply side are the products that Zambia offers (accommodations, attractions, restaurants, entertainment, transportation and local inhabitants) and the demand side is composed by the travellers needs and wants, characteristics and market trends.

The first sub-question aims to create an overview of what are the tourism products in Zambia (the supply side). Only by knowing what are the products available at the moment, it is possible to define whether there is a match or not.

In order to find out which target will be the good match for the available products from Zambia, there is a need for more knowledge about different segments. Within the Brazilian luxury travel market, there are smaller groups that could be segmented demographically, psycho-graphically or

geographically according to the market segmentation concept above. Thereby, sub-question two is about the characteristics of the Brazilian luxury travel market.

The other three sub-questions are related to the demand side of the tourism system. By knowing what are the characteristics of the Brazilian luxury travellers, their needs and wants towards a destination and trends from the market, it is possible to find connections and define to what extent there is a match between the products Zambia offers and the needs and wants of the Brazilian luxury travellers (supply and the demand sides).

The other two questions are also important for this project. Firstly, there should be a clear understanding of what luxury tourism is or who luxury travellers are. The term luxury is quite ambiguous and under researched. Desk research helped on defining this concept. Moreover, Product development came in as a tool when thinking about improving Zambia's product portfolio. With knowledge about product development tools and the role of the DMO on product development, it was easier to produce a structured and tailored advice for the ZTA. A detailed statement about product development can be found in the result of research part.

In the following pages it will be explained which methods were used in order to answer to these research questions.

3.3. Research Methodology:

As shown in literature, there are two kinds of research: Primary and secondary (field research and desk research). As "most research is likely to involve secondary and primary data, both theoretical and empirical considerations and to contain descriptive and explanatory elements." (Brotherton, 2008, p. 16). In addition, "DMO's are well advised to use a mixture of secondary and primary research" (Morrison A. M., 2013, p. 120). Therefore, both, primary and secondary data were used in this research. Hence, "there is so much secondary research information now available for destination management research that it is difficult to identify and describe every source. (Morrison A. M., 2013, p. 120). Another reason to include secondary source to this report is that "It can save time and money to look at secondary information since someone may have previously completed similar research to that which the DMO is planning." (Morrison A. M., 2013, p. 117).

Zambia cannot get reliable and unbiased marketing information about the Brazilian luxury travellers. Therefore, there is a need for knowledge about Brazilian luxury market segment and to what extent they match with the products that Zambia offers. Zambia as a tourist destination is the supply side and the luxury travellers in Brazil are the demand side of this question. In order to get to conclusions about which would be the right target group(s) and what products to offer them, a comparison between the demand and supply sides is needed.

3.3.1. Secondary Research / Desk research:

Firstly, secondary research took place, since "Secondary research data and information must be carefully analysed before primary research is started." (Morrison A. M., 2013, p. 119). And the secondary research can be subdivided into internal and external research.

According to Morrison (2013) internal research could be website log files, social media page text, enquiries and more. (p. 120) In this thesis, internal research was used mainly to answer the first sub-question: "Which luxury tourism products does Zambia offer?" By analysing the ZTA's Website, the

main idea about Zambia as a destination was established. A more in-depth answer about this question was answered through external secondary sources and primary research.

External research was used to answer important questions, like “what is Luxury tourism?” This question could not be answered only with literature; desk research was therefore the best way to elaborate on this core concept. Also with desk research it was possible to learn more about product development and how this tool is used by a DMO. The source for this information was found at the UNWTO handbook on tourism product development. All other sub-questions were researched first by desk research before getting more in-depth information with primary data research. Consequently, there was an overview of the Brazilian market, with its main characteristics, needs and wants and trends from the market, as well as an overview of Zambia as a tourism destination.

Desk research was also used after collecting primary data. It helped to understand even better the market and implement triangulation. Triangulation “consists of strengthening qualitative findings by showing that several independent sources converge on them, or at least, do not oppose them” (Decrop, 1999). In other words, primary data about the characteristics and needs of the market was gathered and later on, this information was confirmed by desk research. In this thesis, that means that primary data was confirmed by desk research. By using primary and secondary data, it is possible to compare results using triangulation. Triangulation increases the reliability of the research. The website of the Brazilian research centre – IBGE –, was used, for example, to confirm statistics mentioned in the primary data. Other sources like reports about the Brazilian market were also used with this purpose. At chapter 5 it will be further discussed how the validity of the data was ensured.

3.3.2. Primary Research / Field Research:

There are two types of primary research: Qualitative and quantitative. For this subject the best approach is the qualitative because it “allows a researcher to see and understand the context within which decisions and actions take place” (Myers, 2013, p. 5). Moreover, “Qualitative research is best if you want to study a particular subject in depth” (Myers, 2013, p. 9). With a qualitative research, new options can appear and the research becomes richer in data. Qualitative research was used, giving a broad image of how the Brazilian luxury travel segment looks like, making it easier to find connections between the destination Zambia and the new target groups. The reasoning behind it is the need for in-depth knowledge about the Brazilian luxury market. “Qualitative information is rather harder to define but the emphasis is on understanding rather than simple measurement” (Hague, Hague, & Morgan, 2004, p. 9). Much of the qualitative research is stressing on the consumers and building the connection on consumers with the products, brands and other marketing objects – besides the motivation. It can help understanding the underlying reasons, opinions, and motivations. It provides insights about segmentation or helps to develop ideas for best suitable destination products. Qualitative Research could also uncover the trends in Brazilian market. Qualitative data will allow the researcher to get more in depth on the subject. “Unlike quantitative research, qualitative research can offer insights into the question of “why” people engage in particular actions or behaviours.” (Rosenthal, 2016, p. 509). By using qualitative research, it is possible to understand the characteristics, needs and wants, and trends from the Brazilian market. Next step, the suitable destination product from Zambia could be suggested.

3.4. Data Collection Methods

The method chosen to collect the qualitative primary data for this research were interviews with travel agencies or other experts on luxury tourism in Brazil and with the ZTA in Zambia. The data collection method for the secondary data was desk research through official websites, books, blogs and more.

3.4.1. Desk Research:

As mentioned before, there are two types of Secondary research: Internal and external. Internal research was used mainly to get an overview about the products that Zambia has to offer. This information can be found on the ZTA's website. External sources were used to answer to the remaining questions.

For all the sub questions it is possible to find many answers by analysing previous researches. The definition of desk research is "the study of secondary source of data-information that is already available either in the public domain or within the private confines of an organization itself." The Australian Tourism Board, for example, has already a document with the outcome of a research about the Brazilian market profile. Some of the questions could be answered by using this kind of previous research. Another example is the Consumer and Trade Research in Brazil, document made by the Canadian Tourism Commission (CTC). Desk research is the way to gain as much data as possible about the market segment. More specific questions that cannot be found on secondary data need to be answered on interview basis. The advantage of desk research is that it can be required whenever it is and wherever it is. This will result in advanced time planning which can reduce the time pressure for the project.

Regarding book references, the data was gathered from the suggested literature and other possibly relevant sources, like other tourism marketing related books available at Saxion's Library. Desk research can also be used to gather information such as the income, age and physiological characteristics of the segmented group. The VISA beneficial policy for Brazilians can be collected through tour operators or tourism related websites as well as official governmental websites as, for example, the IBGE (*Instituto Brasileiro de Geografia e Estatísticas*). IBGE is the Brazilian research centre, "the main provider of data and information about the Country. Such information meets the demands of several types of segments of civil society, as well as the bodies at the federal, state and municipal level." (IBGE, 2016).

3.4.2. Interviews:

Interviews were conducted in order to create primary data about the Brazilian luxury travellers and Zambia luxury products. These interviews answered questions that cannot be answered by using desk research. Therefore, a qualitative approach was needed and was held with field experts; in other words, experts from the luxury tourism market in Brazil who know and understand the long-haul luxury travellers from this market. Moreover, in the supply side, Ms Kofi was the main contact in order to give out information about the products that Zambia offers. The field experts gave an overview about the market, answering questions that cannot be answered with desk research alone. According to literature, "one of the advantages of interviewing when compared with other more structured and deterministic methods of data collection is sometimes seen to be the degree of flexibility that exist while the process of collecting the data is taking place" (Brotherton, Researching Hospitality and Tourism, 2008). These experts understand better about luxury travellers and what are their needs and wants. It is also a way to

confirm the findings of the desk research. The experts chosen to answer the interview about the demand side are professionals directly connected to the luxury tourism industry in Brazil.

Personal interviews were made, giving the researcher a good understanding of the Brazilian luxury segment. As mentioned before, this thesis employed an in-depth, qualitative research with field experts. This was done in a face-to-face method using open questions in order to get as much information as possible about the target group. During the interviews, an interview guide was used. This can be found in appendix 6. In other words, the interviews can be considered as semi-structured interviews. With a qualitative research, it is possible to get a more in-depth knowledge about the actual market situation. Information about trends and developments or a more general information about the Brazilian luxury segment can be easily identified after the use of qualitative research.

"Standardized open-ended interviews are likely the most popular form of interviewing utilized in research studies because of the nature of the open-ended questions, allowing the participants to fully express their viewpoints and experiences." (Turner, 2010) That highly decrease the bias of translation. However, the difficult part is coding the data. With the coding finished by the researcher, he finds the repetitive answers from same area questions. Therefore, the validity of the answers was increased.

In order to have a good interview, questions should be prepared in advance. The interview guide was designed largely according to the tourism system from the theoretical framework chapter. The interviews covered aspects from the demand and supply sides. During the interviews, the interviewer needed to be a good listener and tried to get interviewees to describe their experiences, understandings in their own terms. The results could be imposed obligations on both sides. (Rubin, 1995) In order to reduce the bias, the researcher would follow up with more questions for clarification or understanding. The researchers interviewed people who are from the luxurious travel field and who also are the experts. To ensure this flexibility, getting the best out of each interview, the researcher used face-to-face approach. Due to the geographic location of several respondents, all the interviews were made via Skype meetings. All the interviews were recorded, which gave the possibility to review and better analyse the data gathered.

The researcher could call this kind of interview as interviewing of elites. "An interview with an "elite" person is a specialised case of interviewing that focuses on a particular type of interviewee. Elite individuals are considered to be influential, prominent, and/or well-informed in an organisation or community; they are selected for interviews on the basis of their expertise in areas relevant to the research." This kind of interviewee could help the researcher in obtaining valuable information to unbiasedly answer the questions and analyse the whole situation (Hertz, Studying elites using qualitative methods., 1995). As for the research on the demand side, at least eight travel agencies that are representative of the Brazilian tourism sector or other experts with experience on outbound luxurious travellers were selected to answer the same questions about the Brazilian luxurious travellers.

The ZTA wanted to understand the Brazilian market in order to increase the number of arrivals and improve its products or, at least, offer the right products to the right market segments. Understanding the Brazilian luxury market is one of the main aims of this research. The data was collected through interviews. "Interviewing is generally regarded as a useful approach where qualitative data are required and more in-depth exploration is necessary." (Brotherton, 2008, p. 151). Face-to-face interview gives the possibility to interact with the respondent "as there is a real-time contact between the two parties, the opportunity will arise for interaction and, therefore, deviations from a standard script to take place as a consequence of the responses given." (Brotherton, 2008, p. 152).

The information about available tourism products in Zambia would be obtained through the meetings with Ms Kofi and, as mentioned in the beginning of this chapter, using desk research on official websites (internal and external secondary data).

3.5. Sampling Plan

Sampling the population is of extreme importance for the research, for sampling is "a smaller version of the whole it is obtained from that reflects the same characteristics as those of the whole" (Brotherton, 2008, p. 164). Due to time limitation, it was not possible to collect and analyse data from more than eight interviews in the given situation. Uwe Flick (2015) mentions that the time limitation given to bachelor students makes it unrealistic to organise, do, transcript and analyse more than eight interviews (p.27). The researcher chooses for this reason to focus more on the quality of the data rather than the quantity of respondents, increasing the validity of the research. With no high number of respondents, there was a focus on better validity of those contents rather than focusing on the reliability. The interviewees chosen are key positioned people in the Brazilian tourism market. As for the qualitative interview with field experts, purposive sampling was used, which "can be used to select sample subjects on the basis of some important characteristics they possess." (Brotherton, 2008, p. 172). In these interviews, people who have key positions in the tourism market were approached as, for example, a representative from a travel agency in São Paulo that sells trips to Zambia, and representatives from different travel agencies in other parts of Brazilian who also have knowledge about the Brazilian luxury market profile.

During a tourism fair in Brazil (FESTURIS), the researcher made a few contacts who are active in the Brazilian travel market. The Brazilian luxury travel market is a quite specific topic and getting to the right people can be challenging. The method used in order to get enough respondents was the "snow ball effect". After every interview, the researcher asked for another reference, when the respondent could introduce the researcher to another potential interviewee. This is essentially a referral mechanism. Those "sample subjects are asked to recommend others who could provide the information required." Or "experts are asked to recommend potential subjects who have desired characteristics." (Brotherton, Researching Hospitality and Tourism, 2008, p. 172) However, after a couple interviews, the researcher faced some difficulties to find new respondents. At this point, a call was placed on Facebook at a well visited Facebook page, asking for the help of possible respondents who work on the tourism industry and with knowledge about outbound tourism in the luxury segment. After one day, replies started to come in. With the high number of replies, the researcher could choose the respondents with the best profiles to interview.

3.6. Data Analysis Methods

The data gathered with the interviews encompassed the information about the Brazilian luxury travellers and trends of the market. This qualitative data was produced in audio. Transcripts had to be done and, whenever necessary, translated into English. Once these data was in a text format and in English, the data was organised, because "the first problem is to address how these raw data can be organised to reduce their scale and complexity" (Brotherton, 2008, p. 210). The method used to "organise" these data is called coding. "Coding in general is a matter of attaching operational and/or

conceptual identities to the data in order for these to be organised and categorised, then to be broken down and reassembled in a more meaningful form." (Brotherton, 2008, p. 211).

4. Results of the Research

In the following pages are the results of the desk research, as well as the results of the field research about the Brazilian luxury travellers and the products from Zambia. Furthermore, the answers to the research questions will be presented.

First of all, this chapter will represent a summary of all the interviews with field experts from Brazil. Those interviews were all guided by the interview guide, which can be found in appendix 6. The interview guide was made according to the core concept "The Tourism System". The transcripts in English are in appendix 2 and the coded content is in appendix 3. The data gathered from the interviews is about the characteristics, the needs and wants and trends of the Brazilian luxury tourism market.

Secondly, the research questions is answered based on the results of the interviews and additional desk research. The questions list started inquiring the characteristics of the Brazilian luxury market, then moved on to questions towards the needs and wants of the Brazilian market. In sequence, the question about trends and developments of the tourism market in Brazil was made and finally, an overview of the luxury tourism products in Zambia would be given.

4.1. Desk Research about Luxury Tourism

When luxury is combined with travel, another more specific concept came about. YouGov's Travel & Leisure Director, Scott Booth stated that "today luxury travel is an amorphous concept. Those with the means, pursue exclusive, differentiated itineraries that cater to their desires." There are many definitions of what luxury tourism is instead of a single, universal definition. An online survey was conducted with 1,084 luxury travellers to find out how they define luxury travel. The result is that 51% said the best words to describe luxury travel were: 'exclusivity', followed by 'differential', 41%. The next instinctive responses amongst the interviewees were 'uniqueness' 30%, 'experience' 28% and 'discovery' 24%. (Parker, 2014) The term 'luxury tourism' is thus a very personal concept rather than a universal one. However, expensive, uniqueness, exclusivity seem to be key to assess it when it comes to grade luxury.

The other desk research about the meaning of this term, luxury tourism was done. In an article about the evolution of the luxury market it read: "It could be people seeking for luxurious attractions want to be noticed; or that, on the contrary, want to be left alone." (Fox, 2011). Privacy plays an important role for luxury travelers as well as comfort factors and high standards of accommodation and dining will always feature on the luxury traveller's wish list. George Morgan-Grenville, Chief Executive Officer of Red Savannah says "today's luxury traveller seeks more depth of understanding and immersion into local culture than ever before. People do not just want to see – they want to participate." (Johnson, 2013) Comfort, interaction are being appreciated by luxury travellers. Becx Whitefield, Owner of TripAfrica states that "The ultimate luxury for any wildlife enthusiast or safari-goer? Exclusivity." (Johnson, 2013) Luxury tourism involves comfort, high ending material elements, and emotion experience. Expensiveness, exclusivity, uniqueness, are the crucial standard analysis elements that resulted from the research.

4.2. Desk Research about Product Development

"Tourism Product Development is a process whereby the assets of a particular destination are moulded to meet the needs of national and international customers." (UNWTO and ETC, 2011, p. 4). The

range and calibre of the tourism product Zambia offers is what attracts tourists there. "Product development in tourism is one of the cornerstones of the marketing framework. This section outlines where product development fits within the marketing framework and provides additional context from other industries." (Canadian Tourism Commission, 2003, p. 9).

This thesis, in the end, could provide important information for the ZTA to make a more detailed marketing plan. "Product development for tourism is a long-term community and/or region-wide commitment to understanding and engaging community participation." (Avery, 2012). What Zambia could offer must match, in some extent, to what the Brazilian segment wants while the products developed should reflect the market's tastes and trends. A good product development will "increase and speed up the sector's economic contribution; shape development in a form that ensures it is both sustainable and responsible, providing good experiences for the tourist but also bringing substantial benefits to the local community and safeguarding the natural environment." (UNWTO and ETC, 2011). Those results are fairly matched with what Ms Kofi would like to achieve in the end and corresponding to ZTA's mission and vision.

Based on the steps of the product development shown on appendix 24, the first step taken during the process could not be other but to perform a market research. By understanding the market profile, characteristics, tasks, trends and segments the researcher is able to find matches between the product and the demand sides." (UNWTO and ETC, 2011). With the research part done, it is possible to advice the ZTA about what areas should be developed. After that, there are other steps that should be taken into consideration, namely: stakeholder consultation and collaboration, flagships and hubs, clusters, circuits, events, product portfolio and investment plan, human resource development and finally marketing and promotion. However, due to the time constraints, the researcher was not able to cover the whole process, specially HR development. Which steps would be taken is highly dependent on the evaluation of the alternatives presented in the chapter 6.3.

4.3. What are the Needs and Wants of the Brazilian Luxury Traveller?

Mazza & Stul (2012) gives an idea about what will be luxury customers demands when it comes to luxurious travel product: *exclusivity*. Brazilians from the luxury segment want to feel exclusive. In general, Brazilians are quite dependent on a travel agent when booking their trips, especially when it comes to new destinations. The trip has to be organised beforehand with all the services like transfers, meals and accommodations included. The exclusivity can be a hotel that not many travellers have access to, avoiding lines, ensuring a good location of the hotel, extra services included in the travel and more.

Another need is the need for sharing. As social media is broadly used in the country and the number of users is still increasing (see Appendix 16). Brazilians like to post in their social media about the trip they made. They share in social media things like the restaurant they have been to, the places they visited and how luxurious the hotel room is. Social media also plays an important role on the choice of a destination.

Brazilians are very demanding when it comes to accommodation. They want something near the main touristic attractions, if possible inside it. In reviews at TripAdvisor (2014) some opinions of Brazilians can be seen. In appendix 8 some reviews for the Royal Chundu, written by Brazilians, can be seen. The only complaint found is about the location of the lodge, but this is compensated by its relaxing and exclusivity characteristics. The hotel should offer breakfast and international meals with flexible service time. Brazilians will choose for a known brand because the image is important, and coming back

to the word *exclusivity*, they would pay extra for special services that make them feel exclusive, like a private tour with a Portuguese speaking guide.

When it comes to Attractions, Brazilians will choose for mainstream tourist attractions, also taking exclusivity into consideration. They like to make use of VIP areas, private tours, translation services and to have access to restricted areas, for instance. The attractions should not be too distant from the accommodation, since transportation is considered waste of time.

Restaurants is something very important for Brazilians. A bad gastronomy can cause a very bad experience. First of all, Brazilian food is quite international, and the traditional food is beans with rice. Brazilians appreciate very much when they can find their own food abroad. They are in general meat lovers, however, the search for special meals like vegan or dairy free is increasing every year. Brazilians like to try local food; however, while also being concern with health safety. Brazilians takes hygiene seriously: "Brazilians are super-clean people, especially when it comes to their food." (Lee, 2011).

When talking about entertainment it depends on what the place has to offer. Brazilians love to shop, which makes their favourite destination the USA. However, for destination Zambia, people are more likely to go for a different experience or a relaxing trip. In addition, the main point of the trip will surely not be shopping oriented. Older travellers would like to have all comfort and the entertainment should not be too intensive. When it comes to younger generations, they like to try more and dare. Brazilians are concerned with safety and are not inclined to take unnecessary risks. Coming from an emerging market, Brazilians will like to try entertainment options that are completely new for them, like walking with wild animals, or riding elephants.

Most travellers have driver's license. The more adventurous ones would certainly like to have some freedom and rent a car. Older ones are more focused on comfort seeking. They prefer to have all the transportation included in their package. They would not like to handle this in the destination. It is important for them that the service is well arranged. A Portuguese speaking guide will help Brazilians to eliminate language barriers. When travelling by plane, they will choose for business or first class with as less stopovers as possible.

From more desk research, it is possible to back up the points mentioned. For example, "Brazilian do pay extra attention to the quality of service, the convenience access that they could get, or a taste for a global or local cruising." (Mazza, 2014) A summarising table can be seen at Appendix 30.

4.4. What are the characteristics of the Brazilian luxury traveller?

McKinsey identifies three main categories of luxury consumers in Brazil: High Net Worths, AAAs, and Aspirationals. In the high net worth group are the 13.777 households (0.1%) with an income of at least R\$ 46,555 per month (25,200 USD), mainly new and self-made money. The AAA group includes the 182,500 households with an earning between R\$ 20,925 and R\$ 46,555 per month (11,346–25,200 USD), characterized by a high level of education and sophistication. Thirdly, the Aspirational group comprises 662,600 households with earnings of more than R\$ 11,630 (6,303 USD) (Hoffmann & Coste-Maniere, 2013, p. 38) Those luxury consumers have something in common: they like to spend and show off. Besides this, they love credit, and even those who can afford to pay up front prefer to pay through instalment plans. Brazilian luxury consumers think that service is fundamental. Throughout their history, Brazilian elites have been able to afford full time maids and servants. This has created high expectations regarding service at luxury industry and the need to feel truly distinctive as luxury customers. (Hoffmann & Coste-Maniere, 2013, p. 39)

According to the European Travel Commission (2015), wealthy people were a traditional class in the past. Nowadays however, they are youngsters below 30 years of age who became rich.

Other concepts of luxury in Brazil are that the traveller "looks for experiences totally exclusive, limited to the lucky few. A safari in the desert, could be an example. Not just a normal safari: we are talking about a very luxury camping, for just a family or a group of friends. Just a few have access to this kind of luxury." (Borges, 2014)

There are traditional travellers, who know already destinations as South Africa, have been to Europe and several times to the USA, whom are normally 50 years old or more. There is a group who never travelled and has emerging market characteristics, a group of Brazilians between 35 and 45 years old. Most of Brazilians travel in couples, rarely alone and sometimes in groups. Considering the average Brazilian as the one with emerging market characteristics, they are looking for renowned brands that have some tradition and with an image already built. They are more focused on the material than on the cultural aspects, giving more value for something with a good image then on something new.

Table could be seen at Appendix 30.

4.5. Results from Interviews

After the interviews had been conducted, the outcome is summarised as follows:

Information about interviewees:

All interviewees are from the hospitality industry in Brazil and have deep knowledge about the Brazilian luxury travellers. They are mainly travel agency owners, including one interviewee who owns a DMC specialist company and another who works in the sales department of a known luxury hotel chain.

Demographic characteristics:

Luxury is more connected with income in Brazil. To be considered part of the higher social class a Brazilian should make more than US\$ 45,000.00 per year, "It is shown that in Brazil there are more or less 3 or 4 million people in this class." (Salvador, 2015). According to Mr Gagliardi (2015), most of this population is above 50 years old and travels with the family. Moreover, several interviewees mentioned that a younger population is travelling more often at the moment, and they travel mainly in couples. Women will rarely travel alone, maybe in groups, while men sometimes travel alone. Teenager and kids may travel together with their parents. According to the interviews, Africa (South Africa) is often targeted as a honeymoon destination, sometimes as family vacation destination but rarely a destination for individual travellers.

Psychographic characteristics:

Two distinct groups are clear. There are the traditional travellers, who have the high income for longer time; and there is another group from emerging markets, who are new in the travel industry.

The traditional travellers are in smaller quantity. They already travelled a lot and look for new destinations. Within this group, there are the older ones (above 60-year-old) who look for comfort, and there are the younger ones, who are adventurer. The first – and older – group of travellers will generally research about the destination beforehand and will look for something more than just good hotels: they will look for experiences. This group would repeat a destination, trying to have an even better experience next time.

The emerging group is much bigger in quantity. The travellers from this group like to go to mainstream destinations and stay in the best hotels. They also like to show off to their friends where they have been and share pictures taken in expensive restaurants. This segment is new in the travel industry and it gives more value to the tangible material than the cultural. Those are people with a high income but with a low cultural level. The main purpose to visit a country will be connected to the country's image. They will choose for traditional destinations, as the ones from the G7 (New York, Paris, London...). Most of the information gathered here is about this kind of travellers, since they are the ones who are traveling most now.

In general, luxury travellers from Brazil make extensive use of the internet. Social media is very popular in the country. Some look up for destination information online, others want the service from a travel agency, especially when traveling to new destinations. They do not want to have trouble during the trip and like to have everything well organised (preferably by the travel agent or tour operator) before leaving. They are looking for tailored packages, and they want to feel exclusive. They want to be in the popular places but in the best location and best hotel with comfort. Brazilians appreciate a good service very much, and will pay more for the exclusivity. In the end they want everything well organised for them, including transfers, tours, and other services.

Geographic characteristics:

The largest amount of rich people in Brazil is in São Paulo. There is where the most of Brazilian luxury travellers come from. There are also wealthy people in Fortaleza (Northeast of the Country), but the main concentration of wealth is in the Southeast and South of the country, mainly in the state of São Paulo.

Needs and wants regarding Services, accommodations, attractions and more:

Needs and Wants	Type of travellers	Characteristics
Service	New travellers	Exclusivity; Differentiation; Portuguese speaking reception
	Traditional travellers: comfort	Small groups; Excursions; Preferably with a Portuguese speaking tour guide; Whole trip with tours arranged in Brazil already
Accommodations	New travellers	Tradition accommodations; Traditional brands; Stays in big cities; More material, less sensorial; Expensive is always better; Show off; Differentiation; Exclusive feeling
	Traditional travellers: comfort	Comfortable hotel; Good facilities in the hotel; Good location; International food in the hotel; Good service; No necessity for famous brand; Good experience
	Traditional travellers: Explorers	Flexibility; Multiple hotel options; Tours with smaller groups
Attractions	New travellers	Mass attractions; Visit only famous spots; Only the "best" out of the destination; Instant consumers; Superficial attractions; Mainstream activities
	Traditional travellers: comfort	Famous attractions; Other attractions are a plus; no extreme activities

	Traditional travellers: Explorers	Knows about attractions beforehand; Interest different attractions (not usual); Unique experience
Restaurants	New travellers	International food is a must
	Luxurious travellers: Comfort	International food is a must; Local food is interesting; Food safety is really important (hygiene); Many don't dare to try local food; Diversity of food is important
Entertainment	New travellers	Mass entertainment; Trendy famous brands; Something they can show-off
	Traditional travellers	Privacy; Educational meaning
	Traditional travellers: comfort	Rest; Light entertainment
	Traditional travellers: Explorers	Diverse entertainment options; New experiences
Transportation	New travellers	Private transportation; Business class flight
	Traditional travellers: comfort	Executive class flight; Least stopovers as possible; Access to VIP areas in airport; Combine not more than two destinations in one trip; Guided trip with reception at the airport; Could use public transportation in short trips if there is guidance; Least transportation as possible within the destination
	Traditional travellers: Explorers	Often rents car; Make use of public transportation; Travel within the destination
Interaction with locals	New travellers	Follows a program; Not much interaction with locals; Has language barriers
	Traditional travellers: comfort	Hospitality is really important; They are used to the Brazilian hospitality; They would appreciate a nice story about the locals; Interaction with locals only during excursions; Privacy from the traveller is important; Not much interaction with locals
	Traditional travellers: Explorers	Interest about local population; Interest in the culture; They like to interact with the locals

After a deeper analysis of the data, it was possible to identify the main differences between three different target groups; they are the new travellers, traditional travellers seeking for comfort and the traditional travellers who are explorers:

New travellers:

These, as the name suggests, are new to the market. They have high expectations when travelling, are looking for a superior feeling. Always looking for popular destinations, they want safety, they have a low cultural level and are quite superficial. More information can be found on appendix 3.4.

Traditional travellers seeking comfort:

This group also wants to feel exclusivity and wants the least trouble possible. They are at the destination to relax and have more comfort than at home. There is some interest on the local environment; however, they would not feel comfortable to get out of the planned program. More information can be found on appendix 3.5.

Traditional traveller's explorers:

These travellers are looking for a deeper interaction. They would like to have more options, rather than just one package. They are also seeking exclusivity but have more interest on the local environment.

About the image of Zambia:

Zambia is not well known in Brazil. In the South of the country not even the travel agents knew much about Zambia. There are people in Brazil who sell Zambia as a tourist destination but combined with other destinations like Botswana, for example. Zambia has no image by itself in Brazilians mind but is sometimes in a mix with South Africa. For most Brazilians, talking about Africa or South Africa is the same thing. Lack of the sense of considering Zambia as an individual destination is the fatal signal towards Zambia. In São Paulo the awareness about Zambia is slightly bigger than in the rest of the country. However, a bigger marketing input is needed from ZTA towards Brazil.

Trends about kind of trips that Brazilians are making:

Cruise ships market is currently a trend in Brazil. Traditional travellers are getting interested in new destinations (always with a travel agency organising the trip). Demand for domestic destinations is increasing due to the devaluation of the real and the high price of the dollar.

Economic trends:

All respondents mentioned about the increase in the dollar value at this moment. The economy in Brazil is currently in recession. From 2000 until 2010 there was a big shift in the economy: many people changed their social class. Besides, Brazil is considered as an emerging country – therefore, there is a great potential for market growth. However, at this very moment people are afraid of spending too much, as the dollar raised in price so fast in the course of the last year. Travel agencies that work with outbound tourism suffered a lot last year (2015) and until the end of this year (2016) will still suffer. The economic situation in Brazil is expected to improve only after 2017. Therefore, in the short term, people are unwilling to spend too much abroad. But in the long term it has always been like this: people from Brazil like to spend money abroad instead of spending domestically.

Destinations visited trends:

Most tourist destinations visited by Brazilians are in the USA and Europe. There is a trend for new destinations like Thailand, Vietnam, Cambodia and Asian Countries in general. Younger travellers prefer the USA and Europe. There is a new class who is more adventurous, between 30 and 40 years old, who is looking for African destinations, for instance. Destinations inside Brazil are being more visited by the upper class now. The middle class wants to travel abroad for the lowest price. Some travellers are looking for destinations that also suffered with the raise of the dollar, like Argentina for example.

Other trends:

As mentioned before, Brazil is an emerging country. People start to have the option and they will do the luxury trips for themselves. Therefore, the Brazilian luxury market will only grow.

Tips for the ZTA:

Work with travel agencies. Market Zambia as a Luxurious destination towards the target market, improving the image and bringing awareness towards the target. Follow the example of South Africa selling the product in Brazil. The Brazilian market is only growing and travellers have the craving for new destinations. Parents with kids could be a market segment for Zambia. For instance, when the kids are too old for Disneyland, African destinations are suitable for targets in all age ranges. All Brazilian passengers who travel to Africa have to travel via Johannesburg. Therefore, working together with South Africa might be a good idea. The Brazilian market is very complex; hence, segmentation is needed. To participate in events in Brazil, like WTM, ABAV and Festuris is recommended to improve the knowledge about the destination in Brazil, especially because people are afraid of what they do not know because most never heard of Zambia as a destination.

After a more in-depth analysis using axial and selective coding, the researcher came up with more detailed, clear and structured results. Appendices 3.4, 3.5 and 3.6, show the main characteristics per different target group.

The first target group analysed in depth was the 'New Travellers'. This group, as shown on appendix 3.4, has high expectations when they travel, and low cultural level. More specifically, as is also shown on appendix 21, this group has the characteristics of an emerging market and value more the material rather than sensorial experiences. Further explanation will be given on the evaluation of variables, point 6.1 of this report.

The second target group analysed was the traditional market. This, as seen on appendices 3.5 and 3.6, could be subdivided in 'comfort' and 'explorers'. The comfort ones, as the name already indicates, is more focused on having a comfortable experience. They would like to have as little effort as possible and as many facilities available. The 'explorers' are generally younger and are even more interested in cultural aspects. Moreover, the 'explorers' are looking for a deeper interaction with the destination. This is shown on appendix 3.6 and is further analysed on the advisory part of this report.

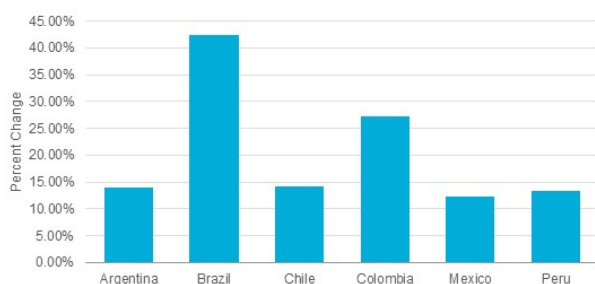
From the following article, desk research result is showed about needs and wants, characteristics of luxury travellers and trends and developments from Brazilian travel market. It can further enhance the triangulation. Different methods used and leading towards the same results.

4.6. Trends and Developments of the Brazilian Luxury Travel Market?

"The Brazilian luxury market is progressing at double-digit rates and was evaluated to be worth US 7.59 billion in 2010, McKinsey has estimated that 3 million Brazilians can afford luxury goods. The market has really taken off in the last five years. [Sao Paulo is where everything happens, because] "it

concentrates more than half of Brazilians GDP and is home to most Brazilian high net-worth individuals” (Hoffmann & Coste-Maniere, 2013, p. 37)

One of the most mentioned trends in the field research is the valuation of the dollar. The table below shows that Brazil had above 40% of change in its currency value:



Source: (Bourlier, 2016) Figure 7: LOCAL CURRENCY PER US\$1, PERCENT CHANGE (JANUARY 2015)

The US is the leading destination for Brazilian outbound tourists, as shown in Appendix 17. Another trend is promoting holidays through the internet. “The growing penetration of mobile technology and the unquestioned popularity of social media and review sites globally are converging to speed up the response time between businesses and clients.” (Euromonitor, 2016) Furthermore, “the sustainable tourism awareness is coming up as well as multi-destination tourism. Travellers want to use the same time but to pay a visit to more places.” (Euromonitor, 2016)

At the moment, there is a recession in the Brazilian economy, influenced by the crisis in China, other external factors and some internal factors. The dollar raise affected the outbound travel from Brazil and people are afraid of spending too much since the Dollar values can change at any moment. “A slow recovery should begin by 2017, driven initially by exports.” (Euromonitor, 2016). Between 2000 and 2010 there was a huge shift on the social class in Brazil and that is one of the reasons why Brazil is considered an emerging market. Travellers with more experience are now looking for new destinations, while the ones from this social class shift are new in the market and look for mainstream destinations. Inbound travel is stronger this year because of the raise on the dollar value. However, in the long term outbound travel is expected to increase. Brazilians visit in mass the USA, they go often to Europe, and are traveling more to Asian destinations. The cruise ship industry receives many Brazilian luxury travellers as well. Destinations in Africa are not well known, except for South Africa, who build already an image in Brazil. Travel agencies have a big influence due to traveller inexperience and their language barriers. UNWTO (2013) mentions that “Travel agents continue to exert great influence over people’s travel decisions. This is partly due to most people’s inexperience in international travel. As well as perceived language and culture barriers.” Right now, those agencies are heavily promoting cities from EU and States. (P. 22)

4.7. What are the luxury tourism products in Zambia?

As mentioned before, the points considered to analyse the tourist destination will be the same mentioned by Kozak & Baloglu (2008): they are accommodation facilities, tourist attraction sites, restaurants, entertainment, transportation and local inhabitants (p. 52). Before entering in details in each one of these points, one should introduce Zambia as a destination.

In the introduction of this report, the Victoria Falls are mentioned. These falls are considered one of the world nature wonders and are the main flagship within the Zambian destination. Moreover, the Victoria Falls are located in Livingstone, one of the main hubs in Zambia. Other hub is Lusaka, where the Kenneth Kaunda International Airport is located.

The focus of the ZTA is on promoting the natural resources of the country. Since 2011, Zambia has its new logo with the slogan “Let’s explore”, in order to “market one of nature’s best kept Secrets – Zambia’s tourism potential.” (Zimba M., 2011). In addition to the Victoria Falls, the country is rich in water resources, being one of the most water-rich countries in Africa. There are other 17 waterfalls besides Victoria Falls, vast lakes and rich rivers like the Kafue River and the famous Zambezi River (4th largest river in Africa).

Other main attractions in Zambia are the national parks. “About 30% of Zambia’s 752,614 square kilometres is reserved for wild life” (ZTB, 2016). The largest national park is the Kafue; it has 22,400 km² of area. The Kafue is located about 2 hours by car from Livingstone. There are options of luxury accommodation (lodges) inside the park.

Accommodation facilities:

Trip Advisor (2016) indicates that Zambia has a wide range of accommodations with prices that vary from about US\$ 20 for a backpacker up till US\$ 1000 per night in a lodge. For the luxury segment, there are lodges, 5 star hotels and stylish tented safari camps or rustic and remote bush camps.

The following list contains the touristic attractions with an accommodation structure for luxury tourism:

Figure 8: Where to stay in Zambia

National parks	Waterfalls	Lakes	Towns & Cities
Kafue	Victoria Falls	Lake Bangweulu	Livingstone
Kasanka		Lake Kariba	Lusaka
Lochinvar		Lake Tanganyika	Other towns
Lower Zambezi			
Luambe			
Mosi-oa-tunya			
North Luangwa			
Nsumbu			
Nyika			
Sioma Ngwezi			
South Luangwa			
West Lunga			

Source: (ZTA, 2016)

The types of accommodations available in the country are: Hotels, Bed and Breakfast, Lodges, Backpackers (Hostels), Camps, Chalets, Guest Houses and Camping sites. “Literally, the luxury places to visit would be the Victoria Falls and national parks where luxury in terms of utmost comfort and exclusivity is guaranteed. Some of our most renowned luxury facilities include Royal Livingstone, David Livingstone Safari Lodge, Sussi and Chuma, Chinzombo Safari Tented Camp, Chichele Presidential Lodge,

Royal Zambezi Lodge just to mention a few.” (Kofi, 2016). For more information about these accommodations, please refer to appendix 22.

Tourist attraction sites:

As mentioned before, the main attraction in Zambia and its flagship is the Victoria Falls, located at the Zambezi River in Livingstone, at the borders between Zambia and Zimbabwe. The table below shows the main attractions available in the country:

Figure 9: What to see in Zambia

National Parks	Waterfalls	Vast Lakes	Cities & Towns	Historic
Kafue	Victoria Falls	Lake Bangweulu	Chingola	Monuments
Kasanka	Kalambo Falls	Lake Kariba	Kitwe	Museums
Lochinvar	Kundalila Falls	Lake Mweru	Livingstone	Shiwa Ngandu
Lower Zambezi	Lumangwe Falls	Lake Tanganyika	Lusaka	
Liuwa Plains	Ngonye Falls	Rich Rivers	Ndola	
Luambe	Other Waterfalls	Kafue River	Siavonga	
Mosi oa Tunya		Luangwa River	The Copperbelt	
North Luangwa		Zambezi River		
Nsumbu				
Sioma Ngwezi				
South Luangwa				
Other Parks				

Source: (ZTA, 2016)

As mentioned on the ZTAs website, “Zambia is commonly regarded as one of the most beautiful, friendly, diverse and unspoilt countries on the entire African continent. Aside from the majestic Victoria Falls, Zambia has more natural water resources than any other southern African country, including a myriad of other falls dotted across the country, not to mention the famous Zambezi River. The many National Parks offer great opportunities for observing Africa’s plains game and their attendant predators, whilst bustling urban areas offer a taste of eclectic Zambian culture.” (ZTA, 2016) Considering that the Brazilian market is mainly interested on mainstream attractions, the Victoria Falls would be a must-see for this market. “The Victoria Falls is considered the world’s largest curtain of falling water measuring 1,701 metres wide and 111 metres deep. The mist and noise produced by the drop inspired the Kololo people living in the area to name the waterfall Mosi-oa-Tunya (“smoke that thunders”). The waterfall, with its nearby game park is a major attraction for visitors to Zambia.” (ZAS, 2004) The Victoria Falls is located in Livingstone.

According to ZTA’s website (2015) other attraction in Zambia includes national Parks, Zambia’s game reserves that provide pristine sanctuary to a wide variety of wildlife, and boast some of the best game viewing opportunities in the world. From the North and South Parks on the hippo and croc-infested Luangwa River, to the wide expanse of the Lower Zambezi, The Kafue is known national park in Zambia with a diversity of animal species of wide over 200 mammals that include the Big Five (lion, giraffe, leopard, rhino and elephant).

Restaurants:

Luxury lodges and restaurants are well prepared for international tourists in terms of restaurants. “Zambia has several themed international restaurants serving both local and international cuisine such as Oriental, Western, Indian, Mexican dishes just to mention a few. Most foreign cuisine is served through A la carte.” (Kofi, 2016) After analysing reviews from Brazilians who stayed in Zambia already, the restaurants available in the lodges and hotels meet the expectations of the Brazilian luxury traveller. These reviews can be found as appendices 8, 12 and 13.

Entertainment:

“There are several entertainment facilities in major cities which have modern equipment and have international standards. Live performances are becoming a part of most accommodation facilities.” (Kofi, 2016)

Within the attractions above mentioned, the activities below are available:

Figure 10: What to do in Zambia

Adventure Activities	Safaris & Tours	Leisure Holidays
Abseiling	Birding Safaris	Fishing Trips
Bungee Jumping	Canoeing Safaris	House Boating
Elephant Trails	Guided Safaris	Culture festivals
Flights over Victoria Falls	Mobile Safaris	Other Activities
Gorge Swing	Photographic Safaris	
Horse Trails		
Hydro speeding		
Kayaking		
Lion Walks		
River Boarding		
Swimming Below Victoria Falls		
Victoria Falls Devils Pool		
Walk with Cheetahs		
White Water Rafting		

Source: (ZTA, 2016)

Transportation:

There are daily international flights arriving in Lusaka and Livingstone. However, there are no direct flights coming from Brazil. All travellers coming from Brazil have to make a stopover in Johannesburg. “Transport is available through public transport operated by the private sector – scheduled departures for bus coaches to major towns and cities, car hire services for both small cars and 4x4s, scheduled air services, air charters and a railway service which is undergoing a major upgrade.” (Kofi, 2016)

Public transportation in general is underdeveloped. “Problems with transport and communications help keep Zambia poor. Whether by rail or road, transport is expensive and unreliable.” (SARPN, 2008) However, the luxurious travel industrial in Zambia, hotels are normally providing transportation for travellers. Travel agencies prefer to outsource the transportation service to local business. (Livingstone Tourism Association, 2016)

Local Inhabitants:

Zambia comprises 72 ethnic groups which makes the country one of the most vibrant mix of cultures, languages and traditions. However, the official language is English. The ZTA (2015) states that Zambia is also widely-considered to be one of the friendliest and most welcoming nations in the world. An example is given by Wikitravel (2016): if the travellers are lost in the village or near the attractions, they could ask for locals for help. Zambians are more than willing to help solving travellers' problems. Generally speaking, Zambians are friendly people.

To sum up, luxury travellers will be more than welcome in Zambia. Local people are friendly and helpful. Being accompanied by a local guide is a good idea for traveller. Zambia could have Portuguese speaking tour guides to assist travellers.

4.8. Conclusion of the research: To what extent is there a match?

As mentioned before, after reviewing the data collected, two main groups of Brazilian luxury travellers were identified. The researcher decided to call them the "new travellers" and the "traditional travellers". As seen on appendix 21, the new travellers are in general younger, they spend more impulsively and have many characteristics of an emerging market. Their preferred destinations are the United States and Europe. They like to show-off and visit as many destinations as possible; they give more value for the material than the sensorial; in other words, they value more products and facilities than the experience itself. For this group, brand and image of a destination are extremely important.

On the other hand, the 'traditional' travellers are mostly older than 50 years old, also mainly couples but these ones travel often with the family. They have a good educational background and give more attention to the quality and to the experiences during the trip. They would choose for a first class flight. They will research the destination before the trip and still are inclined to choose for mainstream destinations. The image of the destination is important. Despite representing a much smaller percentage of the population, this group would repeat a destination and stay longer. They could also be subdivided in two smaller groups; the ones who seek comfort (normally older than 60 years old) and the ones who prefer to explore (mainly women, often in groups).

In addition to that, there are many characteristics that both groups have, which can be seen at appendix 21 and will be further analysed in the advisory part of this report. In the following pages, the answer to the main research question is given.

- To what extent is there a match between the current luxury tourism products in Zambia and needs and wants from the Brazilian luxury travel segment?

Firstly, Brazil is a huge country and the luxury travellers can be segmented in diverse different groups. There are though two main groups that become more clear in the end of the research. The first, a small portion of the total, is the group of traditional luxury travellers. This group has a higher level of culture, travelled more already and is willing to explore more and discover new destinations. Further, this group is interesting because they like to spend more time in each destination. The second group, much bigger, is typically found in emerging markets. To this group, luxury is mainly connected to "expensive", with lower value given to culture. A common characteristic of this kind of traveller is that they want to visit mainstream destinations and stay at the most famous hotel.

In general, a Brazilian from the luxury market has a high income. In most of the cases, luxury is not connected with culture. The biggest part of this market is in São Paulo and Rio de Janeiro, where most of the country's wealth is produced.

Below is a table summarising what the Brazilian luxury travellers want, what is offered by Zambia and to what extent there is a match between the supply and demand sides. More in-depth on these conclusions can be found on the advisory part of this report. The points range from 1–10, where 10 is the best match and 1 is the least. The grade was given by the researcher, based on all facts discovered during the interviews. A caveat: this score grading system is subjective, according to what information is available for the researcher. This system is inspired by an article 'How to Identify Strategy with a SWOT Analysis' (wikihow.com, 2015)

Table below shows the consideration of the three proposed alternatives based on the mentioned criteria. For each criterion, a value between 1 and 100 is given where 1 is totally not important and 100 is very important. These values are given to weight the criteria based on relevance and importance. Then for every segment, a value is given between 1 till 10, where 1 means the most demand and 10 means the least demand. The weight and value are multiplied and result in a total score. The best segment would be the one with the highest score.

A value of 60 is given to the criteria 'Time'. The reason is that if now Zambia not try to enter the Brazilian market, later its competitors for example, South Africa would. And Building a destination image is a lot of work for ZTA, that takes time also. However, competition is not so intensive at the Brazilian market. The criterion 'money' gets a value of 90, because the available amount is restricted. The importance of 'money' is obvious. A segment that demands lots of money will not be targeted as there is simply no more money available. The last criterion 'people/resources'. It has a value of 70. It is important that the current people can execute the advice to keep costs as low as possible. And all the resources are being well prepared for the targeted segment. However, ZTA has not many staff, due to the budget reason. They cannot hire more staff. Therefore well using 'resources' is important.

Figure 11: Match between supply and demand sides

	Demand from the Brazilian luxury travellers	Match	Available luxury products in Zambia	Points
A c c o m m o d a t i o	<ul style="list-style-type: none"> – Good location – Comfortable environment – Package features from hotel – Good reputation – Exclusivity 	<p>Luxurious hotels with strategic location, e.g. Royal Livingstone</p> <p>Specialty Lodges near the Victoria Falls, (examples can be found on appendix 8, 12 and 13) The focus of the marketing should be given on these kind of accommodations. Work with travel agents and</p>	<ul style="list-style-type: none"> – Lodges – Hotels – Guest house <p>Examples: Royal Livingstone, David Livingstone Safari Lodge, Sussi and Chuma, Chinzombo Safari Tented Camp, Chichele Presidential Lodge, Royal Zambezi Lodge</p>	8 (not all the luxurious hotels are at good locations)

n s		tour operators and offer tailored/ personalized services		
A t t r a c t i o n s	<ul style="list-style-type: none"> – Popular attraction – Easy to access – Good reputation – Privileged access – Mainstream attraction 	<ul style="list-style-type: none"> – The Victoria Falls – Safaris – Certain National parks <p>Focus on mainstream attractions for the new travellers. Include more special services in the attractions. Marketing out the Natural concept</p>	<ul style="list-style-type: none"> – National parks – Water falls – Lakes – Cities and towns – Historic (monuments, museums) 	9
R e s t a u r a n t s	<ul style="list-style-type: none"> – International food range – Hygiene/Cleanness – Easy to access – Great layout 	<p>Meals served in the luxury accommodations</p> <p>International cuisine in renowned restaurants with transfer service from the accommodation.</p> <p>The more options the better.</p> <p>Pay good attention to food hygiene.</p>	<p>A la carte and buffet</p> <p>International and local cuisine with easy access</p>	8
E n t e r t a i n m e n t	<ul style="list-style-type: none"> – Educational – Easy to access – Good reputation – Shopping experience – Innovative 	<ul style="list-style-type: none"> – Safaris and tours – Wellness tourism <p>Younger people from this target would like adventure tourism</p> <p>With the varieties of activities that available in Zambia, the traditional group and emerging group can both find their interests.</p>	<ul style="list-style-type: none"> – Adventure activities – Safaris and Tours – Cultural activities 	8
T r a n s	<ul style="list-style-type: none"> – First-class – Comfort – Exclusivity – Arranged route 	<p>The road situation is bad in general due to the natural aspect.</p> <p>However, most Brazilian from luxurious</p>	<ul style="list-style-type: none"> – Daily international flights – Car rental – Public transportation (Bus, train) 	6

p o r t a t i o n		segment can get well-arranged transportation service already. Just need to let them in advance that the public transportation could be troublesome if they want to travel without the arranged service		
L o c a l s	<ul style="list-style-type: none"> - Hospitality - Interaction with privacy 	Hospitality Locals with some language barriers. And therefore, Brazilian can feel the local's kindness without being disturbed too often	<ul style="list-style-type: none"> - Friendly people - English speaking - Multi cultural 	10

Total: $(8+9+8+8+6+10)/6=8.2$

This is a quite high match number, but because the awareness of Zambia as a luxurious destination had not been well established, there is a huge potential for Zambia as a destination yet to be explored. More marketing effort is needed for ZTA. In addition to this table, the researcher also analysed the match per different type of traveller, which can be found on appendix 27, in the end of this report.

	<u>New traveller s</u>	<u>Comfor t</u>	<u>Explorers</u>	<u>New traveller s</u>	<u>Comfor t</u>	<u>Explorers</u>
<u>Accommodation s</u>	++	++	++			
<u>Attractions</u>	--	±	±			
<u>Restaurants</u>	±	±	++			
<u>Entertainment</u>	±	±	++			
<u>Transportation</u>	=	=	±			
<u>Local inhabitants</u>	±	0	++			
<u>TOTAL</u>	++	++++	+++++			
			±			
<u>Accommodations</u>	++	++	++			
<u>Attractions</u>	--	±	±			
<u>Restaurants</u>	±	±	++			
<u>Entertainment</u>	±	±	++			
<u>Transportation</u>	=	=	±			
<u>Local inhabitants</u>	±	0	++			
<u>TOTAL</u>	++	++++	+++++			
			±			

	<u>New traveller s</u>	<u>Comfor t</u>	<u>Explorers</u>
<u>Accommodations</u>	<u>++</u>	<u>++</u>	<u>++</u>
<u>Attractions</u>	<u>--</u>	<u>±</u>	<u>±</u>
<u>Restaurants</u>	<u>±</u>	<u>±</u>	<u>++</u>
<u>Entertainment</u>	<u>±</u>	<u>±</u>	<u>++</u>
<u>Transportation</u>	<u>=</u>	<u>=</u>	<u>±</u>
<u>Local inhabitants</u>	<u>±</u>	<u>0</u>	<u>++</u>
<u>TOTAL</u>	<u>++</u>	<u>++++</u>	<u>++++++ ±</u>

5. Discussion

According to Brotherton (2008):

"How internally valid the results are raises the issues of authenticity and credibility – That is, how true they are and whether or not they can be believed. How externally valid qualitative data analysis results are, depends on how transferable they are to other contextual conditions. How reliable such results are, depends on their dependability over time or space."

5.1. Internal Validity of the Research

As explained before, in the methodology part of this report, to make sure that the information gathered from the respondents was accurate, there was also a desk research. All information obtained from the interviewees was researched using desk research. This multi method of research can be called "data triangulation". This was done by researching on secondary data, confirming the interviews findings. "Triangulation validates your data and research by cross verifying the same information" (write.com, 2016). In that way, the information obtained with the interviews has been confirmed with the usage of new information obtained on websites with desk research. In other words, the fact that this research uses different points of views from travel agents around the country, and from desk research is a fact that increase the validity. Moreover, the respondents chosen were selected based on their experience and knowledge about the market, avoiding invalid data source.

5.2. External Validity of the Research:

The external validity shows that the sample used, is in fact, a good representation of the population, leading the results to the same conclusion even if the research was done in a different situation. In Brazil, the sample was composed of travel agents. There was a selection criteria taking into considerations that the respondents had experience on the luxury tourism market, selling overseas destinations to the Brazilian luxury market. Moreover, these travel agents were selected from different geographic areas in Brazil, most of them from São Paulo, where most of the wealth of the country is situated. These respondents are not part of the population studied, but a good representation of it, since the travel agents have direct contact with the travellers and these travel agents in special were chosen

based on their broad knowledge about the market. Interviewing a sample of the Brazilians from the luxurious travel segment itself would represent even better. However, the amount of interviews necessary in order to give minimal reliability to the research would make it impossible to finish the research in the given time. Another option thought in order to have this data gathered was design a quantitative research with structured questionnaires for the luxurious travellers in Brazil. However, the researcher would not have enough time to analyse two kinds of field researches in the given time and decided to focus only on the qualitative research interviewing experts, filling gaps and triangulating with desk research.

5.3. Construct Validity of the Research

According to Brotherton (2008) construct validity "depends on the quality of the operational definition used in the research design – that is, how adequate (in terms of coverage) and appropriate (in terms of value) it is." (p.101). In order to make sure that was the case, the research methodology was built based on a literature review, where core concepts were explained and operationalised. It is possible to say that this research has a high level of construct validity, considering the diverse literature used to define the meaning of marketing research and the usage of suggested literature like Kozak & Baloglu to define luxury tourism. However, it was difficult for the researcher to find reliable sources for all the concepts analysed, leading to the usage of some less credible sources in parts of the research.

5.4. Reliability of the Research:

To ensure the reliability of the research, all the interviews were recorded and can be accessed at any time after the analysis. There is a record of the sample used with the contacts details. "To establish the stability aspect of a measure's reliability requires that the measure be repeated over time" (Brotherton, Researching Hospitality and Tourism, 2008, p. 102). With this action, it is possible to prove the reliability of the research at any time. Further, the respondents agreed to answering additional questions if needed. The size of the sample is relatively small, if taken the whole population of Brazilian luxury travellers into consideration. However, choosing interviewing the travel agents instead, was a smart move, taking into consideration that the huge majority of Brazilians Travellers make usage of this services. Furthermore, due to time limitations, only about 8 travel agents were interviewed. In order to increase the reliability of the sample, only travel agents who work directly with luxury intercontinental travellers were selected to answer to the interviews. Moreover, the interviewees were selected from different regions of the country.

The theoretical framework was based on scientific literature, clearly describing and justifying the usage of core concepts. For all the interviews the same interview guide was used, this can be found on appendix 6. The interviews were all recorded, after which transcripts and translations were made. All the points were summarised and stated as findings. Also, the same interviewer interviewed all the respondents.

6. The Advice

Based on the results of the research, the purpose of the advisory part is to give an answer to the management issue: "To elaborate on which tourism products should the ZTA use in their portfolio,

matching needs and wants from Brazilian luxurious travellers from specific target groups. This will be done by presenting a product plan.” Moreover, answer to the advice questions:

- In which target groups of the Brazilian luxury travel market should the ZTA focus on?
- Which tourism products should the ZTA offer to these Brazilian luxury target groups?

Firstly, alternatives are given and analysed. Following, a plan is drawn with the chosen solution, answering to the first question “Who?” Finally, a product development plan, following UNWTO product development handbook guidelines. It answers the advice question as well as gives the suggestion about what should ZTA act on. Components like market research, product matching, cooperation and more from product development are stated in the theoretical framework as well as research part. The costs involved on the implementation of the advice are discussed and finally, a conclusion that answers to the management issue is presented.

6.1. Evaluation of Variables

Based on the results of the research, different segments were being presented and Brazilian Market trends and development were being discussed. In chapter 6, firstly, the different market segments within the Brazilian luxury travellers were shown as different options, and then criteria had been set. After different scenarios towards the targeted segment, the best suitable steps are chosen.

Segmenting the Brazilian market looks like a huge challenge because of the size of the country and cultural differences from North to South, East to West. That cause the problem for ZTA, ZTA does not have much information about Brazilian market. However, with the suggestion that researcher reviewed from Mrs Kofi, the main segment has been defined as Luxury segment. As stated before, within this Luxury segment, the researcher divides three main targets from this segment. The new travellers, the traditional ones seeking comfort and the traditional ones who are more explorers.

6.1.1. The New Travellers

Brazil is one of the BRIC countries, the Brazilian consumer possess many characteristics also present in other emerging countries. The majority of the Brazilian luxury travellers are newcomers in this market. The new travellers are going in mass to destinations such as the USA and Europe. Normally, these travellers do not know any destination in Africa, except for South Africa. They like to show off on the social media where they have been, what comfortable, luxurious experience they had.

For this target, the pitfall of destination product from Zambia is the destination image. Zambia is not a mass destination for Brazil and the reputation is not there yet. It is crucial to attract this target if the reputation and destination image are not there.

6.1.2. Traditional Travellers seeking Comfort

The traditional travellers are more experienced and are already looking for new destinations. The traditional ones are composed of people that grew up in a wealthier family. They have seen the world during their life and now, at an age of about 50 years or older, they are looking for new experiences. They would travel often as couples and many times will take their kids to the trips. They will also rarely travel alone, but sometimes in groups. For this segment, safety is highly valued.

For this target, pitfalls from Zambia as a destination are its infrastructure and some of its adventure activities. Poor infrastructure like road situation means that safety cannot be 100% guaranteed. Only this point can already be a real turn down for comfort seekers. Secondly, due to the natural gift

from Zambia, many activities are out of comfort seekers comfort zone. Namely, rafting, bungee jumping near the famous falls, walking safari and more.

6.1.3. Traditional Travellers Explorers

Explorers have many similarities with comfort seekers, however the biggest difference between them is that explorers pay more attention to interactions. They like exciting activities, they like to enjoy thrills. Both, comfort seekers and explorers are interested in comfort and excellent service.

For this segment, it shows the best potential for Zambia. However, it is a luxury segment, therefore, this segment still pay quite attention to safety, to the comfort level and more.

6.1.4. The right target

From the result from research and the comparison above, the final target has been chosen: the traditional traveller explorers. They match best due to the following:

- The unestablished destination image is not a big problem for them (whereas it is a problem for new travellers)
- They like to explore and take part in different types of activities (whereas some activities are not suitable for comfort seekers)
- They will rent a car to explore by themselves or even take public transportation when they know its safe (whereas new travellers and comfort seekers prefer the arranged transportation)
- They like to interact with locals and know more about their culture (whereas new travellers pay little interest on culture and interaction)

With those marketing points, however, there is still room for the ZTA to improve its destination product to match better and serve better this segment.

6.2. Criteria

Once this target is chosen, criteria have to be established. They are money, time and people/resources.

The client mentioned that ZTA has limited budget for marketing in a total new market. Moreover, the developing funding is also not that easy to get from government. The budget figures remain unknown. Besides that, the result from the research shows that other Africa countries are also aiming at Brazilian market. For example, South Africa seems to start gain reputation in the Brazilian market. Therefore, if Zambia wants to target this market and get a proper market share then it should start to make a better business plan and deploy it in a short period of time. Building a destination image takes time – therefore, time is another important criteria. Last but not least, people and resources criteria. ZTA is responsible for marketing. ZTA already attended few tourism fairs with brochures ready.

For those reasons, it is important that the advice fits within the period, the current number of people working at the ZTA and its available resources. The budget is highly limited so the advice cannot exceed a certain low value.

6.3. Evaluation of alternative solutions

After choosing the right target, three criteria have been set. They are finance, time and human resources. Three important elements are largely interdependent. If ZTA needs to finish a project development towards explorers in a shorter time, then ZTA can throw more people at this development, which in turn will raise the cost of the project, unless by doing this development quicker, ZTA reduces

costs elsewhere in the project by an equal amount. In the following sections, different scenarios are foreseen.

6.3.1. Alternative 1: If time ...

The time constraint refers to the amount of time available to complete a project.

Time is an important element when ZTA develops its product portfolio according to explorer segment. When one of the steps of the plan is being delayed, then the whole development plan could be delayed as well. If staff is not well trained before contact with target customers, namely travel agency staffs, then the target might evaluate that Zambia is not an attractive destination. Consequently, Zambia can lose its tourists.

The best way to cope with this problem is to add more human resources, internally or externally. However, the ZTA needs to keep an eye on the budget. Hiring extra staff could cost highly. Most importantly: if time is a big constrain then ZTA should not conduct product development at its full scale.

6.3.2. Alternative 2: If cost....

The cost constraint refers to the budgeted amount available for the plan. Zambia does not have resourceful budget. No budget means Zambia could encounter many limitations when it tries to development the product. However, if human resources or time could be well used, then budget could be smartly reduced.

6.3.3. Alternative 3: If people/resource...

It is frustrating that ZTA has a limited amount of skilled resources when doing a development plan. However, there are few things that ZTA could do.

1, ZTA should have a solid plan to identify the required people by job function.

2, ZTA should set the necessary resources when the plan is about to start and make a formal request if it is necessary. Those resources could be well prepared and trained for their future functions.

3, ZTA should make good use of potential resources; for example, graduates or post graduates majoring in tourism.

Skilled resources could be tight everywhere; therefore ZTA, should plan better in order to prevent lack of staff situation.

6.3.4. Conclusion

If marketing budget for doing marketing activities is a problem, this would be a huge problem for the new traveller segment but not entirely for the traditional segment since the latter pays less attention for mass tourism destination. If time is not long enough, then it is difficult to build an ideal destination image. It consequently would prevent the ZTA to target new traveller segment well. To target this segment, the people resource needs to be well arranged in order to successfully operate market activities. However, for the traditional market, ZTA needs to pay more attention towards cooperation with travel agencies.

6.4. Product Development Plan

In this paragraph, the implementation of the advice would be described in a product development plan. Using the tool product development successfully is demanding a series of operation. They are:

- 1, understand market tastes and trends– market research
- 2, Market: product matching
- 3, designating tourism development areas/zones
- 4, understand extensive stakeholder consultation – including with the local communities in the areas of development – in an open manner and in a spirit of co–operation.
- 5, pursuing flagships development opportunities
- 6, identifying opportunities for clusters, circuits and events
- 7, preparing a full product portfolio and investment plan
- 8, ensuring that personnel with the appropriate tourism technical skills are in place at national, regional and local levels to carry the process of Tourism Product forwards
- 9, drawing up a marketing and promotion strategy to support the tourism product development, and implement a programme of marketing communications.

6.4.1. Market Research

This thesis is a market research. It helps to understand the segments wants and needs towards the destination product. The destination product opportunities had been analysed and developed and a specific segment to target on was defined: the traditional explorers segment is the best fit for Zambia.

Market research is a good way to understand the tastes and trends from the demand side and it is the most fundamental requirement for successful destination tourism product development. Hence from this report, many informations about what are the segments wants and trends from Brazilian luxury market had been introduced. The conclusion is that the product from Zambia could fulfil the desire of the explorers segment. This segment could only grow with the time.

6.4.2 Product matching

ZTA has limited budget, people and time. Therefore, stakeholder consultation and collaboration is the wise choice. In the product matching step, the marketer gathers all the information regarding the expectations of the target market, and a country like Zambia could use such information to develop appropriate products. Zambia has the wealth of natural and cultural resources with potential to meet the needs and expectations of its segments. It is necessary for this development to be market orientated if it is not for the final product, then it is no customers. In the product matching step, the marketer gathers all the information regarding the expectations of the target market, and a country like Zambia could use such information to develop appropriate products. Zambia has the wealth of natural and cultural resources with potential to meet the needs and expectations of its segments. It is necessary for this developments to be market orientated.

6.4.3 Tourism and product development Areas

Strategy and expanded tourism product could be developed through TDAs/PDAs based on separate and distinctive character zones. For ZTA, there is the system to follow. It is 'Open for certain types of development limited by type and scale'. ZTA did not want mass tourism; instead, it desires more high-spenders coming to Zambia. Each of the TDAs would have a key gateway or hub with a network of tourism clusters and circuits, in each case underpinned by a flagship project. This tourism development has to be based on areas where there is good infrastructure access and tourist appeal to act as "gateways" or "hubs" for a wider region. Plus, more individual sites and attractions near the 'gateway/hub' that are showed to the target as 'cluster' and visit as the form of a circuit.

6.4.4 Flagship and hub Development

Flagship can differentiate the tourism attraction. Normally flagship tourism product are the ones which already have a reputation and a strong market appeal. Namely: Victoria Fall, Kafue National Park. More and more demand will be replaced towards accommodation as visitors normally have an overnight stay.

There are three types of flagships:

1, major development like the bridge over the Victoria falls

2, Cluster of individual products

A tourism flagship could include complementary tourist attractions which could contribute to the same marketing strategy. It needs to have a minimum number of attractions. Its role is acting like a hub or gateway, its ability to host adequate commercial venues in the area, and it needs to have a minimum total investment. In practice, it is also possible to have single major attraction as the flagship and several mid-to-small attractions and activities comprising cluster forming the major flagship. Keynote event, arts and culture can serve to establish a destination's reputation as an important tourism destination.

6.4.5 Cluster development

1, a grouping of attractions and activities in a geographic area that is on a readily accessible route

2, a group of attractions and activities that are linked through a common theme or interest – eg hiking trails, traditional rural lifestyle, product portfolio, investment plan and funding, product investment plan.

Zambia government pays attention to the economic contribution that tourism could bring to it. To present a clear strategy from ZTA, an investment plan could be expected from the government. To attract investment in tourism from foreign or local sources in the latter instance either from large investors or SMEs, the ZTA should pay attention to organisation, framework, regulations, sources of finance and conditions of accessing finance. Product portfolio should be prepared in order to show the potential of tourism to the investors.

The level of investment within the destination needs to be detailed, the sequencing to be pursued, When cooperating with investors whether they are foreign or local, they like to express their point of views about market in terms of tourism product development

Potential Target Group	Traditional travellers explorers
Main benefits of Zambia products	Relaxing, exclusivity, comforting, life time memory, new destination, cultural motive, adventure
Solutions	Help the traditional travellers explorers to enjoy their vacation even more and make a whole new experience for them while fill up the empty hotel rooms in Zambia Fulfil an eco-friendly sense emerging in Brazil while the same time increasing the high spenders numbers in Zambia

Competitor which compete at innovative level	South Africa
The potential of Zambia	Pure land with much more to dos, unfamiliar with Brazilian arrivals. Whole new experience for traditional explorers segment.

ZTA should work hand in hand with travel agents in Brazil and tour operators, since traditional ones mainly book their trips with a travel agent. Moreover, the travel agent with the tour operator offers all the services that the Brazilian travellers demand. This includes transfers, Portuguese speaking guides or even babysitters.

Brazilians are afraid of going to a new destination because they don't really know if the place is safe. However, this safety can be granted by a travel agent. The travel agent needs to know well the destination, in order to sell it. The ZTA should work hand-in-hand with the travel agents and tour operators, they are the ones who have direct contact with the customer and will sell the destination.

6.5. The Financial Implications of the Advice

In order to approach the Brazilian luxury market, the ZTA will have to shift some of its marketing budget into communicate with Brazilian travel agents and tour operators.

It is safe to say, that businesses should be spending at least between 1 percent and 10 percent of sales revenue on marketing, in order to execute an effective marketing plan. However, "it costs more to market new products than it costs to market existing products. Therefore, if a business is launching a new product or product line, the percentage of annual sales revenue they will need to budget towards marketing will be closer to 20 %." (Bransom, The Recommended Percentage of Sales for a Marketing Budget, 2016) But the researcher did not know how much ZTA is willing to put into marketing. "We do not have a budget for Brazil. Our budget for the international markets this year is just about US\$1m. Our forex rate has short up against the Dollar, the current we mostly use to pay for marketing services undertaken abroad. As the exchange rate keeps rising, our budget is losing its value resulting further losses." (Kofi, 2016) Therefore, the financial numbers as below are being kindly estimated:

Following is a rough calculation:

Figure 16: Financial implications

Phrase – Period of time	Tasks	Budget	More detailed costs
Middle of Oct 2016	Plan to get contact with tour	No extra costs	
Middle of Oct 2016	Plan to go to theme events	No extra costs	
Middle of Oct 2016	Get in touch with contacts from researcher	No extra costs	
	Go to Theme events to get more Contacts	No extra costs	
Middle of Oct – 2016	Make an appointment (Contacts from the	No extra costs	

	researcher and from theme events)		
2016	Meet them (Skype or E-mails)	No extra costs	
Nov 2016	Personally Visits to multiple tour operators and agencies in Brazil and visiting the ABAV in São Paulo	Flight: US\$ 1.000,- pp x 2pax Accommodation: US\$ 1.000, - Registration at ABAV: US\$ 1.700, - Other costs: US\$1.000, -	<ul style="list-style-type: none"> • return flight ticket • accommodation • transportation • feed expenses • clients gift budget • client's expenses

Above cost is the first stepping cost to get Zambia out towards directly to its target segment through intermedia's. These costs are based on the research demonstrated on appendix 28. These prices are for two representatives from the Zambia tourism Agency. The 'other costs' includes transportation in São Paulo, and extra meals for two persons. Total to be initially invested = US\$ 5.000, -

With this amount of money, ZTA will more or less have a taste of pilot phrase at that segment. If this way of communication works, then in return will be profitable. Within a year:

- One Agent bring one family per month*12 month=12 family

Due to the fact, ZTA would be targeting traditional ones, therefore the staying days would be highly possible longer than 9 days. According the desk research, it says stay for 9 nights (with other conditions), the cost per person will be US\$11,870 (Safari Cost Comparison, 2016)

- 12 family *4person per household=48person
- In the end, the estimated income that they would pay would be 48* US\$11,870=569.760 US\$

And this value is just from one tour operator who sell package to one family per month for a year. With another cooperation, selling revenue will be even higher. The profit would go certain% to travel agents, but the ending goal to achieve filling empty hotels can be surely fulfilled gradually.

6.6. Conclusion

The conclusion of this report is divided into two parts. Each part answering to one of the advice questions.

6.6.1. In which target groups of the Brazilian luxury travel market should the ZTA focus on?

After analysing all the findings and making an implementation plan, the management issue can be answered:

How can the ZTA best segment the Brazilian luxury travel market into different target groups in order to offer the right tourism products that matches the needs and wants of these groups?

At this moment, the only suitable market segment for Zambia after deep analysis is the one composed by experienced travellers. The new travellers of the Brazilian market are not the kind of travellers Zambia is looking for, since they look for mainstream destination, look for quick consume.

Traditional travellers stay longer than new travellers. Focusing only on the traditional explorers travellers is a better strategy because these are the ones who are looking for new destinations.

Based on the above mentioned facts, the ZTA should not start right away by promoting the Zambian destination in Brazil. Firstly, the budget available is not enough in order to create an image that attracts the Brazilian general public. Secondly, the Brazilian public, in its majority has interest exclusively in mass tourism destinations. And finally, the Brazilian market is really complex and can be segmented with much more details than it has been done in this report. Rather, the ZTA should start by further segmenting the Brazilian luxury travel market, focusing on the traditional (or experienced) travellers. Following the steps of product development, the ZTA could find more specific matches and focus on the right target groups with the right products.

By focusing only on the traditional travellers and further researching about this target, the ZTB will spare resources and energy. Cooperating with stakeholders or private investors is a smart move for ZTA.

Checking the conclusions of the research and further appendix 27 (match per type of traveller), it is clear that the traditional explorers travellers have a better match towards the Zambian destination. These travellers are seeking a unique experience with more sensorial elements, rather than just good facilities. A good Portuguese-speaking guide will make their journey more enjoyable. For these Zambia could offer not only the mainstream attractions, but also show all the rich diversity in the destination. Another interesting fact about the traditional travellers is that "They travel with family" (Gagliardi, 2015). The ZTA could then offer to this group a destination with broad options of activities that involves the whole family. Combining comfortable facilities with options from soft activities to the most radical ones. And this is something that Zambia has already.

6.6.2. Which tourism products should the ZTA offer to these Brazilian luxury target groups?

For explorers, Zambia has a good match. Zambia has what explorers desired for.

Destination Products

- **Accommodation:**

luxurious lodge and hotels, exclusivity and extreme comfort.

They provide really private vacation time for those guests. There are friendly local servers and qualitative meals. However, there are some luxurious resorts with not that good location. Car service is a must to provide to this segment. And a Portuguese speaking guide will be a big plus.

- **Tourist attraction sites:**

Zambia has a great potential to be treated as a new destination for Brazilian luxury segment. The Victoria Falls, the national parks all hold new excitement towards the segments. Zambia has the natural resources, the water resources and wild animal resources open for its target.

- **Restaurants:**

The luxury hotels and lodges in Livingstone are well prepared their cuisine. Convenience walking distance, food safety, international food range and comfortable environment are the strong points from hotel restaurant.

- **Entertainment:**

Thrilling adventure activities namely bungee jumping, elephant trails to leisure holidays like fishing trip or culture festivals to fulfil their once in a lifetime experience.

Hence, important points like exclusivity and uniqueness could all be fulfilled in this African land.

Afterword

Planning and organisation of the thesis

It is pleasing to reach the end of the process of writing this thesis, especially given the long time and the efforts necessary to get to this point. Considering a rather personal reflection, there was some delay in the process due to personal reasons, and this has also influenced the motivation of the researcher because some of the deadlines he himself imposed could sometimes not be kept. This frustration also resulted in further delays, generating a snowball effect. Luckily, support and understanding from the teachers never lacked. Moreover, Saxion offered return sections and constant consultations to help students during the thesis process. Despite the fact that the organisation, planning and time management of the research were at times not well applied by the student, these skills have significantly been improved during the past months. Also writing skills have been improved in the last months.

Regarding the hardships encountered along the way, in some cases the contact with the first examiner was not on a regular basis. Notwithstanding, the researcher tried to contact the first examiner at least once a week. The contact with the client was unfortunately not as frequent as expected. As the client is a Zambian resident, face-to-face meetings were not possible. That meant that the contact with the client was mainly via e-mail and through Skype meetings. Sometimes it took a couple of days until emails were answered and bad internet connections during Skype meetings were also factors that discouraged a more frequent contact with the client.

There were several points that would be improved in the planning and organisation of this thesis, were the researcher to start it anew again. These improvements will however now serve as lessons learned for the researcher and as an example to be avoided by other students. For instance: to make a better time management and improve the research proposal, to begin with.

Overall, this thesis was a great opportunity for the researcher to put into practice what he has learnt during the length of the International Tourism and Management course at Saxion. Besides researching and writing with a strong theoretical framework, the case study allowed to apply this framework in practice, offering a real consultancy to the client. Finally, making use of the researcher background both as a Brazilian national and, thus, a Portuguese native speaker, was unique in the sense that the topic chosen for this thesis could only be fully explored by overcoming the language barrier.

Value of the thesis for the industry

Understanding a new market is important not only to Zambia: it is important to all other destinations that may be planning on attracting this market or other unexplored markets. The knowledge obtained with this thesis opens doors for further research about the Brazilian luxurious market – other countries that are not traditional destination for Brazilians may find great value in this advice. Will the answers given here also hold true for other destinations? Only further research, considering other countries, will be able to properly answer this question. There are, however, other researches that focused on the Brazilian market. Examples are reports produced by the Canadian, Australian, American and South African tourism boards. They also researched Brazil as a potential target market. Each one of these reports contains different data, because of the year they were produced in or because of the approach that the researcher took. Further research could compare these different reports in order to set research standards and perhaps suggest a uniform research methodology considering the best

outcomes from the previous reports in order to improve the reliability and validity of future researches. On the other hand, the African continent should be further explored by the academy: besides the South, what is the touristic potential of other regions and countries in Africa? Besides Zambia and its ZTA, are there other African countries and organisations looking for new markets and audiences to target on?

Finally, it is also worth mentioning that each one of these reports gave more information about the Brazilian market, still at large extent unexplored, especially in the English literature. As a result, this would both add value to the Brazilian tourism industry – which the researcher welcomes as a Brazilian national and enthusiast – as well as raising the awareness of other countries about Brazilian's luxury traveller's great potential.

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Appendix

1. UNWTO: International Tourism Expenditure

Rank		International Tourism Expenditure (US\$ billion)		Local currencies change (%)		Market share (%)	Population (million)	Expenditure per capita (US\$)
		2012	2013*	12/11	13*/12	2013*	2013	2013*
1	China	102.0	128.6	37.3	23.8	11.1	1,361	94
2	United States	83.5	86.2	6.7	3.3	7.4	316	273
3	Germany	81.3	85.9	2.5	2.3	7.4	81	1,063
4	Russian Federation	42.8	53.5	36.5	28.9	4.6	143	374
5	United Kingdom	51.3	52.6	2.1	3.5	4.5	64	821
6	France	39.1	42.4	-5.8	4.9	3.7	64	665
7	Canada	35.0	35.2	6.2	3.2	3.0	35	1,002
8	Australia	28.0	28.4	2.1	8.8	2.4	23	1,223
9	Italy	26.4	27.0	-0.3	-1.0	2.3	60	452
10	Brazil	22.2	25.1	4.6	12.9	2.2	198	127

Source: World Tourism Organization (UNWTO) ©

(Data as collected by UNWTO May 2014)

2. Interview transcripts

Interview 1:

Organisation: Kiai viagens e turismo LTDA

Contact: Janice Brochtein

Address: Felipe Camarão 690/304

Postal code and Place: 90035-140 Porto Alegre

Phone number: 00555130299102

Email: kiatur@kiatur.com.br

Robbert van Hattem:

Thank you very much for your availability for the interview, for your time. I am Robbert van Hattem, am finishing my graduation course in International Tourism by Saxion University in Deventer, the Netherlands. This interview is part of my graduation work about the Brazilian Luxurious market as potential target market for the ZTA (Zambia Tourism Agency). During the interview, that should not take

more than an hour, I will ask some questions about the Brazilian luxurious travel market. Travel behaviour, expectations and what are the trends in general of the tourism market in Brazil.

Do you have any question about the interview?

Janice Brochtein:

No, no, no, you may go on, I thank you for the invitation.

Robbert van Hattem:

The pleasure is mine. So, in first place, in general, how would you describe the Brazilian luxurious travel market?

Janice Brochtein:

In Brazil or outside?

Robbert van Hattem:

In Brazil. What would you identify as luxurious tourism in Brazil?

Janice Brochtein:

The luxurious tourism... I don't work with co-op, have 10 years of business, and I work normally with middle/high class. The people who buys from me, know how to provide from the whole world. But in Brazil they use a lot internet. We are in Porto Alegre, if they want to go to Fortaleza, they will look for it during the weekend for a promotion or maybe buy it with miles, and then they look for me to book a resort, or something else more specific. Hotel industry in Brazil, for the public I work with, this they find by them self. What they are looking for now more often, is for cruise ships. This is something more difficult to be found on internet and then they come to the travel agency.

Robbert van Hattem:

Can you specify the luxurious market by age or any other way?

Janice Brochtein:

My market... What I see is on the age of 50 years old, people who are already financially stable. Younger people goes abroad for studies or they go with their parents, in a marriage, or something like that. I would classify it mainly on age.

Robbert van Hattem:

And geographically? More from bigger cities? Or from smaller cities?

Janice Brochtein:

I can't say much because I sell a lot in big city, I sell a lot to the people from Porto Alegre. I know that people in the country side has high income, but I don't know that market. I know from colleagues from travel agencies that sell well but I can't tell you, this is not my market.

Robbert van Hattem:

How do you think a Brazilian traveller that would like to go abroad, would behave himself abroad? Or starting by, where would they like to go abroad?

Janice Brochtein:

Let me tell you something, my market is a market that knows Europe already, I've been noticing that mostly doesn't want much packages... They want more "forfeit" than closed packages. The closed packages they like that there is someone from here, I have a group that is going to Israel... For my market, we sell many packages or many times they look for promotions of flight tickets and then I sell the hotel, travel insurance for example and in some destinations I sell car. Things can vary, because we are in a serious recession (here we don't talk about recession, here is everything ok).

Robbert van Hattem:

Then the preferred destination is not Europe...

Janice Brochtein:

No, actually... Sorry, I didn't say Europe. Actually people are looking like this: A lot USA, they look a lot for the United States, and a lot for new things like Thailand, (my passengers, I'm talking about my passengers), Thailand... They look for Amsterdam, that neighbourhood... London... Europe... Once we have a flight from TAP, it is really easy for people to go, so to that part from the Iberian Peninsula, people are doing alone, they don't need travel agency, mine not. Today, for example, there was a couple here that was celebrating her 50 years and they are going for a cruise in Greece, they are boarding on the 2nd. Another sir boarding on the 1st, is going to Portugal, but he is 80 years old, so he has to go with a group, he can't go alone. So each thing... But most are looking for packages like that, differentiated, something new.

Robbert van Hattem:

So in this case, a tourism destination as Zambia, if they would like to go there, would they look for a travel agency....

Janice Brochtein:

Certainly they would!

Robbert van Hattem:

They wouldn't go to this kind of destination by themselves?

Janice Brochtein:

I don't think so. Like this: It is not a known destination, it doesn't give confidence to the people, Europe gives more confidence, Zambia... So there should be something to be offered and we would have all the support from you.

Robbert van Hattem:

What about the wishes of this target group... the luxurious market? When they go to a different destination, in our case, Zambia, a destination that they don't know that well...

Janice Brochtein:

They want beautiful places, they say they don't want luxury, but if the hotel is not good they will say bad things about it when they are back and good service. That is what they want.

Robbert van Hattem:

Some kind of touristic attraction in special that they would be interested to see?

Janice Brochtein:

Yes, but it depends, for example like this...I am putting hotels for a couple in Thailand for example, so it is completely different, for example from the sir who is going to... Let's say it like this: For the couple that is going to Thailand it is normal in a honeymoon that they want beach, they want to enjoy each other in the hotel, so it is like this, if there are other attractions, it would be fine. Of course, as much we can offer, and that the destination is on a good price, to attract more public. I can see Zambia here – Shows in the map – How do you get there?

Robbert van Hattem:

What I see being sold are packages that includes other destinations as well, because the flight that departs from here, at least goes first to South Africa.

Janice Brochtein:

Which one is in South Africa, which company? South African?

Robbert van Hattem:

I guess so. Yes, South African.

Janice Brochtein:

I've participate on an event that South Africa does, that showed South Africa till the Cape of Good Hope, really interesting. Because what happens... a tip: for us to propagate a new destination the tour operators would invite us for a breakfast, a dinner... and show the destination, the world is enormous... so for us to know and choose, it is like this, we need to know a little bit. South Africa has showed the Cape of Good Hope, for us is something unusual. So from Zambia, I think it is just the animal part, the animal kingdom, I have this information, don't know anything else.

Robbert van Hattem:

Another interesting question would be what is the image that there is about Zambia. So it is only about animal kingdom?

Janice Brochtein:

The animal kingdom, like in the "Globo Reporter", that show also a bit of the local population... because we mix it up with Africa in general.

Robbert van Hattem:

I think that I realized researching about Zambia in Portuguese, that more is found about the animal kingdom. They have the Victoria Falls, that is sold as tourist attraction, the tribes, and there is also a lot of poverty, I don't know if Brazil would be a market for compound tourism, to see poverty in Africa...

Janice Brochtein:

I don't think so... I don't know, I don't know... Because making a trip like this to see poverty... And come back sad... Because I sell ... happiness. I want you to go there, have fun and come back really happy. Of course there is poverty in the whole world, there is outrage, and other things... it can happen. But I think that the part of the country, the natural beauty, they are really well seen.

Robbert van Hattem:

And... I think it was mentioned already something about the transportation within a tourist destination, it was mentioned that cars are often rented....

Janice Brochtein:

No, but it is like this: It depends where. For example, in the United States, people use a lot car... going to Miami, you take a car. You go to Canada, you may take a car or not, it depends... Amsterdam or Paris it is not possible... there is no need... So it depends on the country, there is need or not.

Robbert van Hattem:

And is there any expectation, the person who travels, of how would this person be received by the local population?

Janice Brochtein:

Like this, my passengers, they prepare for a trip and it is a great event, they want to be received well in the transfer, they want the hotel to treat them well, and they want the locals to receive them well, because the Brazilian people receive well the travellers. I will give you an example in Paris. My husband speaks French, we were well treated, next to us there was someone who could only speak Italian... The waiter didn't even cared about her and didn't treat her well, there is mean less.... Just because she couldn't speak their language. But Zambian people must treat well.

Robbert van Hattem:

Yes... Going to the part of trends of the Brazilian market in general, in tourism. In the following years what can you see? Many people leaving Brazil to visit other destinations? What are the expectations now?

Janice Brochtein:

Well, my expectations are: Even with the dollar price going up, my passengers travel, they spare. If they use to do 2 trips per year they will do only one, if they use to one trip per year, they will do one each two years, but they will travel. Tourism in Brazil is too expensive, if you go from south to north east you will pay more than going to Miami, finding a promotion. I think that, my passengers, the trend are new destinations, sincerely, I haven't thought about Zambia. New destinations as... not really new... Russia... Indonesia... India... you know... because they are looking for something else, if there is something... like... I Africa, I know it is not there, but there is the problem of ... that disease ... Ebola

Robbert van Hattem:

This is also interesting to know, if that affect anything, if often they generalize and see as one thing from whole Africa? Because we know that is only happening in that isolated region and it was really difficult to contaminate Zambia because of the distance...

Janice Brochtein:

Generalize. People here doesn't have this knowledge. I will tell you, who sells trips to Africa, you should get in touch with people from Curitiba... Schultz, I will give you the... Schultz. They are really good, and maybe you would find something there. I will give you their phone. Later I give it to you. Then you can work there.

Robbert van Hattem:

Who knows, If I come back to Brazil later.

Janice Brochtein:

And you speak to the owner to Schultz. You say there, I'll give you... you can keep the business card, I'll indicate you.

Robbert van Hattem:

Ok, Thank you. And... Main events here in Brazil in the tourism. Is there anything that stands up here?

Janice Brochtein:

What stands up is the "shitty" dollar that is rising... From Thursday till today... I'll give you an example, I am trying to make a group, in a package, to go to Israel, every year I do it, today a sir, that has no finance problems, used that as excuse to postpone his trip. So it is obvious that this influence people buying power, so that is the main thing, it is not insecurity, it is not... nothing. I guess is basically, what is influencing is the dollar thing, that it is getting going up.

Robbert van Hattem:

And can you see any opportunity, anything that grows a lot in Brazil? That could be used as an opportunity? Like for example, that Brazilians are travelling to specifically one place or using one product in special?

Janice Brochtein:

The opportunity that I am trying to get is to make packages to this new destinations, that people would like and won't go alone. For example, let's say I make it with Zambia... They don't know how to go alone. So, I would make a package to offer them. Because... Then they go to Canada... to Patagonia

Robbert van Hattem:

Another question I see when talking about Zambia... Is whether the Brazilian traveller would go only to Zambia or would he prefer to go to other countries at the same trip? How would you sell it?

Janice Brochtein:

To other countries. They would go to South Africa for sure. For us, South Africa is very strong, because of the positioning of America and South Africa is more known. I think they would go to other countries in addition to there.

Robbert van Hattem:

And South Africa can be seen as a competitor or would you rather make a package with

Janice Brochtein:

As Zambia competitor?

Robbert van Hattem:

Right.

Janice Brochtein:

No, Zambia has low demand. It is like this, In Africa, people think about South Africa, not Zambia. They think about South Africa, maybe Algeria... something like this, not Zambia. So, if there is a package, South Africa, with extension till Zambia, people will go there and will come back saying that it is beautiful.

Robbert van Hattem:

So an image has to be built about Zambia, this image doesn't exist.

Janice Brochtein:

I think so...

Robbert van Hattem:

So, I guess we mentioned all the topics I wanted to talk about. Is there anything you would like to add?

Janice Brochtein:

No, i would like truly, if you have something to send me about Zambia, you can send it to my e-mail, because it is a new destination and someday it shows up... let's spread! If you have it... I really don't know a think about Zambia. I came to meet you, you said "Zambia", but I don't really realize.

Robbert van Hattem:

Ok. I'll analyse the data...

Janice Brochtein:

Anything you need, you may call me, if you forget anything.

Robbert van Hattem:

If everything goes right I will graduate in November, so till there my thesis should be done, and I can tell you about the result.

Janice Brochtein:

Thank you!

Robbert van Hattem:

If I have still any question, can I still contact you? send an email?

Janice Brochtein:

You can, no problem.

Robbert van Hattem:

I should have a meeting with my teacher this week and I can see what does he thinks about it.

Janice Brochtein:

Does he speak Portuguese?

Robbert van Hattem:

English

Janice Brochtein:

So, we could have spoken in English. We could have spoken in English.

Robbert van Hattem:

Actually it would be a bit easier in the end but I didn't think about that.

Janice Brochtein:

Then you need a translator.

Robbert van Hattem:

Yes, sure.

Janice Brochtein:

I hope you have a good grade and that Zambia will be our next destiny

Robbert van Hattem:

Thank you very much

Janice Brochtein:

You are welcome

Interview 2:

Organisation: Intercity Hotéis

Contact: Paulo Salvador

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Phone number: +55 011 3577-7700

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Robbert van Hattem:

(introduction)

Paulo Salvador:

I not really an expert on luxurious tourism. However, I can introduce to you my friend who teaches Luxurious hospitality. I will send you the contact. I don't know how detailed the information you need.... But let's go! What is luxurious market? According to you what is considered the income of a luxurious market? Here, according to IBGE, we consider a client from "A Class", that is the most affluent class in the market, as a client that makes above U\$45000, – per year. In the pyramid of the social structure in Brazil, there are clients from A class, the ones who earns more than U\$45000, – and this clients, according to the IBGE (the Brazilian demographic research centre in Brazil), is shown that in Brazil there are more or less 3 or 4 million people in this class. So I would like to know from you what is your angle on that. When you talk about luxurious tourism what kind of... what is luxurious tourism when we talk about income.

Robbert van Hattem:

I am asking actually my res...

Paulo Salvador:

So, I think this is really important to your research, when you talk about luxurious tourists, what are their income in the year. This number I don't have for you; I don't have specialization in this luxurious segment. I work with multi process. But this could be the first question you could make to Gabriela Otto. What do you call luxurious tourism considering the income of a household? She will then extract from this 4 million, approximately about I don't know.... maybe 500.000 people or 1 million.... people who earn let's say U\$300.000, – a year and then, yes, considered luxurious tourists to be targeted. So this is the first point you should research on the affluent on the IBGE, who earn above U\$45.000, – who are really hyper affluent and the top of the top of the pyramid. Or in your desk research

Robbert van Hattem:

I will have to research on

Paulo Salvador:

How do I describe tourist's psycho graphically and geographically? Well, I think that psycho graphically, the Brazilian luxurious tourist is really like the emerging market tourist that has a really limited general culture talking about reading of what is comes to be the experience of the luxury that goes beyond the material and goes to the sensorial so, in a general manner, the luxurious tourist in Brazil looks really like a tourist from an emerging market. More about material then sensorial. And this we can apply to all the luxurious segment. For example, the art, the contemporary or abstract art is less accepted by a luxurious consumer that are just now starting to discover on its acts the taste for art. So the figurative art is much more likely to be consumed by this costumer then the abstract art. There are the luxurious products from more traditional brands, easier the reading by this clients, this consumer. They can appreciate much more a watch from Rolex as luxurious product then other brands that are being appreciated by more mature markets. They prefer to have a contact with more demonstration. And going to the part of consumption of a luxurious product, they prefer an accommodation in a destiny more traditional like the ones from G7, destinations as New York, Paris, London, Miami... They would go to this destination and consume the products developed for this emerging market, Visible brands, traditional brands, hotel brands rather to try and experiment something sensorial in his experience. To summarize: today the Brazilian luxurious tourist is more material then sensorial in his experience. In other hand. There is an important component in the emerging countries and in Brazil it happened on an extraordinary way in the last 10 years, that is the social mobility question. If you talk about the luxurious traveller in Brazil, you are talking about people who didn't had access to this luxurious articles 10 years ago. So what happened in the last 10 years is that occurred a really intense process of social mobility in Brazil. IBGE also indicates that. I will also send you a link about this phenomenon (https://www.bcgperspectives.com/content/articles/center_consumer_customer_insight_globalization_redefining_brazils_emerging_middle_class/?chapter=5#chapter5) It says that there were in 10 years, between 2000 and 2010, 10 million new consumers that change from one class to another. It is a lot said about the shifting to the C class, but there was a really strong shift on the A and B classes. For example, according to IBGE this 4 million of consumers considered affluent from 2010, 10 years before they were just half of it. So we had people from C class that went to B class people from B class that went into A class and people from A class that got even more affluent. So, connecting to what I said before saying that the luxurious traveller is more material then sensorial... They don't have culture; they are consumers that didn't have the chance yet to get in-depth on this culture experience in order to increase the sensibility beyond what they now can realize when they see a watch or a hotel or determinate tourist destination. So the social shift phenomena are directly related to this material necessity for the consumer, to have a product that makes it sure for him to have a social recognition as a luxurious consumer who pays high etc. As much you work with stabilized markets that already known to this material consume more you will find other consumers that don't want the common brands, mass destinations then you will find many other consumers who would be much more interested on the niche destinations, boutique destinations then this traditional destination like Paris, London, etc. Then we talk about other destinations, like Africa for example, safaris, Zambia, emerging destinations... Destinations that fit to this new luxurious consumer that will look for something completely different than their parents, who were the emerging ones.

Robbert van Hattem:

Zo Zambia does not have an image of mass tourism...

Paulo Salvador:

No, Zambia does not have an image of mass tourism destination and that is why it does not mean nothing to this new emerging traveller. I'll give you an example: A friend of mine who is from this group that shift from B class to A. He was telling me a month ago, that wanted to make his dream true, that is to make a safari in Africa as marriage celebration. So I told him that in a safari in Africa he should go to Botswana, Namibia, you need to visit central Africa because there are interesting products and equipment... But she said "No! I want to do Safari in South Africa" ... I want to go to safari there because there is the safari from the Kruger National Park, etc.... So, they have the money to go to central Africa, but for them it will be much more recognized if they say that they went to South Africa and stayed in that resorts "of mass" then if they go to a more sensorial experience in Namibia for example but for them it is still quite early consume it. They would rather stay in the palace from South Africa then going to a safari in the central of Africa that would be much more original. But this is a natural process, as soon as they are tired of this common places, this industrial destinations, then they will start looking for other destinations and then it comes the opportunity to get to know Zambia and do some different tourism

Robbert van Hattem:

What about the origin of this markets?

Paulo Salvador:

IBGE indicates that we have a big concentration of the population in a few states. São Paulo has 32% of the Brazilian economy, Rio de Janeiro 11%, Minas Gerais 9% and if you sum up Rio Grande do Sul, you have already 59% of the Brazilian economy. And then I can give you my opinion, if you want to be sure you should do some desk research, I think that with 60% of the income concentrated in this 4 states, I would say that about 80% of the A class will be in this states. So I would say that probably about 80% of the Brazilian luxurious market is concentrated in this four states.

Robbert van Hattem:

Talking now about the needs and wants of this market, what do they look for when it comes to accommodation?

Paulo Salvador:

They mainly stay in traditional accommodations, this big hotels and big Palaces... So for this Brazilian tourists the brand is really important. So there are traditional brands like Ritz Carlton, Waldorf Astoria in New York, in Paris the Prince de Galles is the Brazilians favourite. So you have the big Palaces in the big cities, that attract the Brazilian market, because it is a material market and not sensorial. So for them, showing that they spend their vacations in the Prince de Galles is so important as using a Rolex. They want the mass destinations, however, they also want to have a differentiated service to feel exclusive. So the exclusivity and the differentiation is something important. So when they visit a Louis Vuitton in Paris for example, they don't just want to visit the shop, but they want to be recognized for being the first ones to enter the shop. When they go to Disney then want to be the first ones to get access to the parks and they will pay for it. In terms of entertainment, they are much more interested in this mass entertainment like for example Cirque du Soleil, this great spectacle from east London, this one that are visited by all the tourists, so they are interested in mass entertainment. So they want this mass attractions and are willing to pay more for that, but they don't have the curiosity to meet more than a Broadway, more than an East London or more than the Cirque du Soleil. Alternative programs on a more sensorial manner, does not make part of the agenda of this tourists. About transportation, what do you mean? It will be a transportation that matches this kind of group. It will be private transportation, it works a lot with the local receptive that speaks Portuguese, emerging Brazilian luxurious travellers can't speak

English, they have difficulty with the language, so they try to work with local receptive that speaks Portuguese. And I don't know what do you mean with the local population.

Robbert van Hattem:

In the transportation I also thought about the fight.

Paulo Salvador:

Brazilian like to travel, they will like to have the business class. Brazilians loves to share, to show, to take pictures in the business class to show their friends they are travelling in this class. That is something that is important for the tourist, of sharing, especially now with the social media.

Robbert van Hattem:

And about the local population, they want to get to know about the local population?

Paulo Salvador:

I think they are much more about following the program then interacting with locals. Also because of the language, it makes it not easy.

Robbert van Hattem:

In general, in the Brazilian tourism, what do you see as a trends?

Paulo Salvador:

With the Brazilian crisis there is a retraction in the consumption of luxurious tourism. But if you talk about trends, once this crisis is gone, and we believe that in 2017 or 2018 it will start improving. The tendency is to look for new destinations, there will be a search for new destinations. That is natural, once they had consumed this mass tourist destination they will try to find something new. Brazilians really like to travel and once they discovered everything in the traditional destinations they will look for something new, and then we are talking about emerging destinations, hotels design, independent hotels. The next step for this luxurious market is to look for new destinations. As soon they get more mature as consumer they discover than more than the material there is also the sensorial and this small boutique destination can offer this sensorial. It is really interesting this way of you to try to find the match with a destination that is so distant from the Brazilians like Zambia but that can still become the favourite destination of this more matured consumers

Robbert van Hattem:

Is there anything else you would like to add?

Paulo Salvador:

I can still introduce you to Gabrielle Otto and I sent that link about this emerging Class.

Robbert van Hattem:

(Thank word)

Interview 3:

Organisation: Top Travelling Viagens e Turismo

Contact: Rebeca Zagonel

Address: Rua 17 de Dezembro, 438 – Sala 06

Postal code and Place: Lageado

Phone number: 00 55 (51) 3011.1646

Email: rebecazagonel@gmail.com

Robbert van Hattem:

I want to thank you for taking the time to meet me today

My name is Robbert van Hattem. I am a final year student at Saxion University in Deventer doing my graduation thesis about the Brazilian Luxurious market as potential target for the Zambia Tourism Agency. As agreed previously by email, this interview is being recorded and will be used as input for the research. During the interview, that takes at least 30 minutes, I'll make some questions about the Brazilian luxurious traveller's characteristics and desires, as well as trends and developments within the Brazilian Luxurious travel market.

All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Are there any questions left before I start with the questions?

Rebeca Zagonel:

You may send me the questions, Everything all right!!! Brazilian luxurious tourism is my subject ;)

Robbert van Hattem:

I would like first to ask about you, can you give me a short introduction about your job experience, study, and what are you working with right now?

Rebeca Zagonel:

Graduated in Hotel management 3 years ago, I ended up in the travel agency branch with specialization in domestic and international leisure travels and cooperative service. My department is in the national and international groups, incentive trips and luxurious trips with personalized service.

Robbert van Hattem:

Yes.... How would you describe the Brazilian luxurious tourism market? Talking about the Travellers...

Rebeca Zagonel:

When I think about the costumers I have, they are demanding people, where luxury is with hotel, services and gastronomy

They want the best that there is, the price comes in the end.

Normally they already know what they want... We show the options until it fits best what they had in mind.

They will not make a luxurious travel and stay in a standard room, they will choose for the best.

Really demanding and detailed until the end of the trip.

Dazzle and as much glamour as possible and luxury is offered, helps to call attention to a destination.

I forgot to mentioned, all services like transfers, trips, everything has to be included (and everything personalized)

Robbert van Hattem:

So you would define the tourist by its attitudes?

Rebeca Zagonel:

Yes, by the attitude. Today the luxurious clients are between 30 and 55 years old, normally couple that has a name (they come from known families)

I can feel the difference when I see a luxurious costumer, by the car they have, by the clothes, purse.... the way they pay... Not sure if this makes sense...

Robbert van Hattem:

yes

Rebeca Zagonel:

It is a client that don't ask for a discount, and many times would not even opt for instalment.

Robbert van Hattem:

What about geographically, in general this tourist is from a determinate region?

Rebeca Zagonel:

I think that the ones from the countryside are increasing. If you compare it with Porto Alegre and Lageado, I think the ones from the countryside has a higher income. There are many that had money from the family and is now investing it on luxurious travel.

Robbert van Hattem:

I guess the countryside is potential, but in the big cities more trips are sold?

Rebeca Zagonel:

I will compare:

The one from the big city has more experience, more friends to who they could compare their experiences, he would also ask for benefits or discounts, and will be more demanding.

The one from the countryside is just starting with the experience, he will impress his friends (who also don't have that much knowledge) he has didn't start to compare values. He just wants the service and will pay for it.

I think the one from the countryside is a good potential.

In the countryside people knows quick that somebody went for a trip and they want it as well.

Robbert van Hattem:

(Summarize) Ok. I will now ask about the needs and wants. When a Brazilian luxurious tourist goes overseas, what do they want?

Rebeca Zagonel:

Normally they want the flight in an executive class, if the option is not available then an option with a comfortable seat and they have Infinity or Amex cards that give them access to the VIP lounge at the airport.

Hotels on a good location, infrastructure, concepts, normally form a brand known by a good restaurant quality.

Service: Private, exclusive and many times unusual tours

If there is a car rental, they want the best category

About the wants on the pre-sales and after-sales: all the support, personalized route, 24h telephone availability for emergency case, after-sale a return treat.

Robbert van Hattem:

Any entertainment that can't be lacked? In Africa for example.

Rebeca Zagonel:

In an example, I had a couple who went to the Maldives at Conrad, they stayed at the best bungalow because there was a private swimming pool with access to the sea, exclusive dinner at the island, privet only for the couple, dinner at the aquarium where it has to be reserved with at least 3 months beforehand, private diving with instructor and certificate....

Robbert van Hattem:

What about restaurants? Does Brazilians prefer international food? What has to be served?

Rebeca Zagonel:

The traveller will like to try the local food, but international food is a must... They really ask for it.

We also always ask our costumer whether they have any restrictions towards any food. Than we can already let the hotel know about it avoiding problems. They prefer A la carte service; buffet is not really

well seen. They will normally eat at the hotel. When we make a personalized trip, we also offer options outside the hotel, however, it has to be a really good restaurant, otherwise we don't even offer. Normally they have the package all inclusive. For example, next week there is a marriage in Punta del Este. My client will stay in the Fasano, the whole family with the babysitter for the kid. I need to make the appointment for them on the hair dresser... everything arranged. They will always choose the shortest possible flight with as little as possible connections. When we combine destinations we combine up to two different destinations in one travel.

Robbert van Hattem:

(Summarise) To close this topic, what does Brazilians are expecting from the local population?

Rebeca Zagonel:

Well. They want a friendly reception. Normally luxurious hotels have already well trained staff that all extra services needed.

Robbert van Hattem:

Ok. I would now like to know about the tendencies of the Brazilian tourism. What about the next years, any expectations?

Rebeca Zagonel:

I believe the Market will only grow. At this time with the raise on the Dollar value the main focus is on selling domestic destinations with a higher standard. Specially now with the Olympics coming up, I see all this groups who will work in the tourism. I believe the potential is huge, however we are in a recession right now.

Robbert van Hattem:

How is the raise of the dollar influencing the outbound tourism? People are not travelling abroad because of that?

Rebeca Zagonel:

It depends... If you are talking about middle class travellers, they want to still travel but for the lowest price they can get. It doesn't matter the class in the flights, flight company etc... The higher class is staying often in Brazil.

Robbert van Hattem:

And how is the economy going?

Rebeca Zagonel:

The economy is really slow... unfortunately!

Robbert van Hattem:

And is there any perspective to improve?

Rebeca Zagonel:

I believe that it should improve only after the second half of 2016! People will "Get used" to the situation. They will then start to travel and entertain themselves. Right now they are afraid of getting in debt.

Robbert van Hattem:

(summarize) (Thank word) Would you like to add anything to this interview?

Rebeca Zagonel:

I don't know....

I just remembered that last Friday I sold Ponta dos Ganchos, 2 nights. R\$16.000 (about U\$ 4.000, -) Only breakfast included... It is not anyone who would pay for that. The payment was upfront. Who understands that? The market is weak, but still there!

Robbert van Hattem:

(thank you word)

Interview 4:

Organisation: Silversea Cruises

Contact: Lígia Secco

Address: São Paulo Area

Postal code and Place:

Phone number: 00 55 11 99469-7022

Email: ligias@silversea.com

Robbert van Hattem:

Dear Ligia This is Robbert van Hattem, and I am doing my graduation thesis in terms of Luxurious Tourism in the Netherlands about Brazil. I find you through LinkedIn and your profile match my interview potential. Therefore, I would like to kindly ask you for a quick interview. Two main questions would be there: – What are the desires of the Brazilian luxurious travellers? (what do you think their needs and wants are) – In general what are the trends and developments of the Brazilian travel market? We could do this through Skype or even with email if you prefer. I really wish the chance could be granted. And last point I like to mention is I would send you my result if you are interested. Looking forward your reply.

Best Regards

Robbert van Hattem

Lígia Secco:

You Hello Robbert, sorry it took me so long to get back to you. It will be a pleasure to help you on your thesis and thank you for this opportunity to talk about Luxury Tourism in Brazil. My answers are below and we can also schedule a skype call to clear any doubts you may have: – Brazilians always look for service when travelling, I would say they like to be pampered and spoiled. It could be as simple as having a photograph of their family members when arriving at a hotel, what is important is that the clients feels appreciated and not another one in the crowd. But this is in general terms because Brazil is a big country and we have some mature markets and developing ones. In more mature markets we see a trend toward experience travel, as this clientele has travelled for a longer period in their lives and experienced the most know places, reason why they are looking for the unbeaten path. When we talk about developing markets, the old feel of luxury is still important. – Travel trends in Brazil are not only related to destinations per se but also to economic aspects, such as currency fluctuation. In 2015 we saw the dollar going from 2.7 to 3.9 in just a few months and this variation was reflected on tourism: more Latin America and national travels. On the pure wish to travel I would say experience trips are getting bigger such as bike tours, expedition cruises, river cruises and cultural destinations. Looking forward to hear from you. Regards, Lígia Secco

Robbert van Hattem:

Hi Lígia, Thank you very much for your answers. It is already a great input for my research. I believe I can still get some more valuable information talking to you. Are you too busy this week before Christmas? I will be available, working on my project this Monday the whole day, Tuesday morning and Wednesday

morning (December 21st, 22nd, 23rd). Would you be able to meet me on Skype on any of these dates? My Skype name is robbert.van.hattem Looking forward to hearing from you. Best regards, Robbert van Hattem

Interview 5:

Organisation: Meliá Hotel International

Contact: Fernando Gagliardi

Address: São Paulo

Phone number:

Email:

Robbert van Hattem:

According to your experience, what is your understanding about luxurious travel? And Could you tell me about your background?

Fernando Gagliardi

I started my career from working for my dad who owns a travel agency. My function was a tour operator. Later years I started my own company, my company main function is representing local high ending hotel, and my focus is the up class customers. promoting and marketing are crucial. And our main business region locates at South America or EU. However, my clients range wildly.

Robbert van Hattem:

And what would you describe as luxurious travellers?

Fernando Gagliardi

What I see now is there are two main groups of high ending travellers.

First one, I call it traditional one. They are rich the whole life. They belong to the rich people social pyramid; they really pay attention to the quality. They only like to consume good quality goods. For travelling, they must take the first class flight, they would seek for better provider because it means they have good quality.

The second type I call it recent group; this group of people they get rich at recent decades. They find any chance to consume, they are instant consumers. If they have a trip, they would like to not only make the trip enjoyable but also make the trip recognisable. By recognisable, I mean, they like to spend lots of money on brandy stuff, to show another people that they are enjoying a superb vacation.

Robbert van Hattem:

where do you think rich people mainly coming from in Brazil, I heard São Paulo is one, what do you think about others?

Fernando Gagliardi

Well, indeed, São Paulo holds the rich people's population. Partially because São Paulo has 20% of the whole Brazilian population there. Besides São Paulo, rich people also coming from south part of Brazil. People there have higher score of willingness to pay.

Robbert van Hattem:

What do you think those people's desire? what is their needs and wants when they travelling?

Fernando Gagliardi

well, from my point of view I think first the traditional group, they seek more privacy, seek more pleasure and maybe a trip with more educational meaning.

Second, for the recent group, they are definitely looking for recently-famous brands, because those brands are highly recognizable and have a good reputation. Then it is easier for them to show off by using those brands reputation. It is very important for this group to be recognizable.

Normally if those who travel are younger couple, they would like to enjoy new experience and try different things. But for old couple, they would mainly enjoy more about good qualified food or have a good rest.

Robbert van Hattem:

You mention about that you divide rich people mainly into two groups. What do you think will be their main differences?

Fernando Gagliardi

Traditional group are most likely being older than 50 years old. They travel with family. They have good education background. And if they travel, they want to learn about destination's culture, they like to interact with local people.

The recent group are younger than traditional group. They mostly travel as couple. they could easily spend more money without thinking too much. They want to have the best thing that place could offer and they are willing to pay. They consume instantly and they are more attracted by the most super facial attraction. Also they are more easily attracted by main/ mainstream activities. Moreover, when they go

to the best restaurant in town, they like to take lots of pictures and show off later on Social media. This group can be easily recognizing and they want to be recognize as well.

Both group travel a lot, and the percentage rate would be 50% –50% of traditional group and recent group.

Robbert van Hattem:

What do people in Brazil think about travel trend in Zambia?

Fernando Gagliardi

About Zambia, not many Brazilian know, let alone about real travel trends there. Zambia now is not recognizable, only few number of people know about Zambia. I do think Zambia should start to build destination awareness, start to do the marketing.

Interview 6:

Organisation: Kalymã Viagens Especiais e Turismo Ltda.

Contact: Maria Regina Monte

Address: Rua João de Sousa Dias, 155 – Brooklin

Postal code and Place: São Paulo – SP, 04618-000

Phone number: +55 (11) 5078-9888

Email: kalyma@kalymaturismo.com.br

Robbert van Hattem:

(Introduction to the Interview) How do you describe the luxurious traveller in Brazil?

Maria Regina Monte:

I divide it in two categories:

The experience travellers: They know what they want and research the destination before travelling in order to take the best out of it. This group can be sub-divided in two other groups, the ones who wants comfort: Normally above 60 years old, spend more time in the destination, like to understand the place. And there are the ones who travel alone and like to explore. This are mainly women, 5 women to 1 man.

The second group is the “Passport stampers”: This one’s don’t even knows where they are going but they know how many countries they are going to visit, and won’t even remember where have they been. They love to go, for example, to Antarctica because there they can get many stamps, I won’t talk much about this group.

Robbert van Hattem:

What can you say about the needs and wants of this different travellers?

Maria Regina Monte:

The ones who seek comfort would usually choose for excursions in small groups, normally with a guide accompanying from Brazil, they will stay in good hotels and with the tours already settled.

They like local guides who knows about the destination and who can tell a nice story about it, showing the deferent architecture from different ages. Many of those, don't dare to try the local food with concern of having food poison and just interact with people from the excursions. The independent one's research well the destination in order to choose where to go and generally they are not happy to go to usual places where others go just for the passport stamp, they want something different, unique. They rent a car, go by train and make their own discoveries. Try local food, and they want to know the local population. This one's will normally book the hotel just for the first 2 days of the trip and probably for the last 2 days. They like freedom to change the rout according to the way the trip is going. In new destinations they would like to go in small groups.

Robbert van Hattem:

What are the trends of the market right now?

Maria Regina Monte:

During all the time I have been working in the tourism industry (30 years) the luxurious tourist never have been down. But today even this market is suffering with the crises. It is a lack of political perspective as well as economic this market is reducing. The ones who can, are moving to the USA, Canada, or even Europe to run away of the crisis. This market is stagnated as soon as the situation improve the luxurious tourism will be back to normal again. Today people who were planning to go to Dubai, for example, are going to Porto de Galinhas, afraid of the unstopped raise of the dollar. We have to change the president, before that it will not change. She could fall this year, or next year... Today is stagnated. I think it is not the right moment to invest on the Brazilian Market, maybe after the half of 2016. South Africa is well known here, they come every year and show their destination to the travel agencies and the travellers, they do a really good job here. It is a good idea to start showing the destination, mainly to the travel agencies, because they are the ones who sells this kind of destinations. A good way of starting is presenting Zambia here as a destination, not now but at least after the second half of 2016. And focus in something different that Zambia has. For safari people go to South Africa.

Robbert van Hattem:

So, do you think the Brazilians would be attracted to Zambia by the Victoria Falls?

Maria Regina Monte:

The Brazilian luxurious traveller have the tendency to choose for mainstream destinations. Often they are attracted to a new destination because of its image. Sometimes it is not even about the destination, but a specific hotel in the destination. There is the example of The Palace in South Africa. People would like to go to South Africa and want to stay at the palace to show off to their friends. My advice is to focus on one pull factor within the destination, like the Palace in South Africa. I don't know Zambia, I never sold Zambia. In Brazil we have the Foz do Iguaçu waterfalls, in the past people would go to Foz do Iguaçu not for the waterfalls, but to shop across the borders, now they want to go there and stay at the Bourbon resort. So I would not sell the waterfalls, but the attractions in the park, the hotels ... Brazilians also loves to buy. Because most of the travellers are older they would not like to have extreme activities. They would rather have something like a drive safari. Moreover, they would not go to Zambia for safari if they could also do it in South Africa. Zambia should find an USP to sell to the Brazilians. Could be something like "this is the place where the Nile is born", I don't know.

Robbert van Hattem:

What about the origin of this travellers?

Maria Regina Monte:

São Paulo, mainly the state of São Paulo. This is the main traveller's exporter in Brazil. São Paulo, Ribeirão Preto (countryside), Fortaleza.

Robbert van Hattem:

I heard a lot about South Africa, do you consider them Zambia's Competitors? How do you see that?

Maria Regina Monte:

Well, I will put it like this: I had a passenger who said he wanted to go to South Africa, "what do you have in South Africa?" Then I explained "And in North Africa?" ... When talking about Africa, the first think that comes up in mind is South Africa. I try to suggest other places in Africa to my costumers, but they don't even know other places. It is complicated, there is knowledge about the rest. The best option is to sell South Africa with other destination, like Zambia. The problem is that there is no huge demand on it and the tour operators would charge too much for something like this. The best idea is to follow the example of South Africa. They are doing a really nice job. They take influential people in Brazil and take them to get to know the destination.

Robbert van Hattem:

(Thank you word)

Interview 7:

Organisation: Corps Lazer Agencia de Turismo

Contact: Silvana Sena Pilão

Address: Rua Alexandre Dumas, 1268 / Cj 65 / Chácara Santo Antônio

Postal code and Place: São Paulo, CEP: 04717-003

Phone number: Tel.: (11) 2609-8155 / (11) 5181-1367

Email: corpslazer@corpslazer.com.br

Robbert van Hattem:

(Introduction to the Interview) I would like to start asking you, what is your experience in this market?

Silvana Sena Pilão:

I have a travel agency and work already longer than 35 years with tourism. I always worked with tourism. My agency has 15 years. We work with luxurious products as well as others. We worked before with cooperative tourism but now we focus only on the leisure tourism.

Robbert van Hattem:

I would like to start asking about your opinion about the Brazilian luxurious traveller. What are their main characteristics?

Silvana Sena Pilão:

They are a lot of money. Older people. I see people looking for different things. Want to be well served, a good product with a differentiation. They want exclusivity, when in a destination they want to do something that others would not be able to do. Mainly couples, rarely men travel alone, and women sometimes in groups.

Robbert van Hattem:

What about the age?

Silvana Sena Pilão:

From 45 above up till 75... 80 years old. They don't like to leave home and spend to have less comfort.

Robbert van Hattem:

What about the origin of this travellers?

Silvana Sena Pilão:

São Paulo is the place where the money is. In the countryside of São Paulo there is a lot of wealth. There are some really rich people in the north east of Brazil. But the main point is São Paulo, the state.

Robbert van Hattem:

Talking about needs and wants, what can you say about the Brazilian luxurious traveller?

Silvana Sena Pilão:

There are costumers who says that there need to be a gym, others covered swimming pool.... big rooms.... sometimes they ask for Jacuzzi... executive class on the flight. So they want a good restaurant a good location a good hotel, breakfast has to be in the hotel. International food is a must, they like to try local food, but it has to be a good chef, with the chef, has to be safe.

Robbert van Hattem:

What about in Africa then?

Silvana Sena Pilão:

Well they want something comfortable in an exotic place. They like to experience new adventures but with the comfort. Even knowing about nice places to be discovered they still want to go to see the fauna, the animals... Like Kruger, Mala Mala, they want as much as possible luxury in an exotic place. For example, a group who went to Botswana, they ride elephants, this thing is amazing for them. Well there are the younger, the older.... going on a balloon.... Always with safety of course. So the balloon that goes from the safari or sleep in a tent... this exotic thing is appreciated.

Robbert van Hattem:

What about the local population in the destination?

Silvana Sena Pilão:

They have to receive the traveller well. Brazilians complain a lot about the French for example that they are too direct, also the Italians... Brazilian like to feel well received, they are a warm culture, just not too much in order to keep the traveller's privacy.

Robbert van Hattem:

And what about the tendencies of the market?

Silvana Sena Pilão:

People are trying different places. New destinations like Vietnam, Cambodia, Asia in general, Bali. They are trying this different places. We still sell Australia, New Zealand. But what is growing a lot are these places in Asia. Africa has been better. Africa is a destination a bit more economic, even in the luxurious segment and today it is expensive.

Robbert van Hattem:

So what about the economy?

Silvana Sena Pilão:

The tendency for 2016 is not good. It is everything too expensive now because of the dollar. Brazilians really like to travel and they are adapting themselves to the situation. They reduce the number of days in a trip, travel less times, but they don't stop travelling. In general, it is really heavy now. There are still people with the trip booked, so we are still busy, but they are quite worried with the tendencies. And then there is the Chinese crisis to make it worse...

Robbert van Hattem:

This is what I would like to ask. Would you like to add something to this interview?

Silvana Sena Pilão:

We knew products. In order to take people for your product you need to sell it. Of course you need to have some differential. There are also younger people who travel with this market, and Africa is a nice destination for younger people. However, there is no hotel in Africa that receives, it is difficult to find a hotel that sells a room for a couple with two kids for example.

Robbert van Hattem:

What do you think about Africa as honeymoon destination?

Silvana Sena Pilão:

When Brazilians think about honeymoon they think about Tahiti, the Maldives. For a destination like Africa... When I talk about kids I mean teenagers. This luxurious traveller sometimes wants to take the kids with them for a nice trip. The kids are too old to go to Disney, so Africa could be an option. Especially

if you can combine a radical activity with something softer. We look a lot for destination that we can sell for older people with young together.

When we sell Africa we always sell Johannesburg. In order to get to Cape Town from Brazil you have to go through Johannesburg. They prefer to have direct flight, but if there is no other option, they will use the connection. They would not mind by using train in the trip as soon as all the way there is someone to guide and the trip is not too long.

Robbert van Hattem:

(thank you word)

Interview 8:

Organisation: Avant Garde The DMC Experts

Contact: Sidney Alonso

Address: R. André Ampère, 153. Cj. 142

Postal code and Place: CEP: 04562-080 São Paulo, SP

Phone number: +55 11 3569-0857

Email: salonso@agbrands.com.br

Robbert van Hattem:

(introduction) I would like to start asking about your experience on this topic

Sidney Alonso:

I own a DMC specialists company. A DMC is private company who receives the tourists in the destination and organizes all the services. We represent 18 international DMC in 40 countries. We work mainly with Asia, Middle East and Africa, also the Mediterranean region. I represent a DMC from Africa based in Johannesburg. They have offices in Kenya, Zambia, Uganda and if I'm not mistaken also in Mozambique. So I need to connect them with the Brazilian operators. So I have a huge knowledge in the Brazilian market. I have about 27 years of experience in this market.

Robbert van Hattem:

So, how would you describe the Brazilian luxurious market?

Sidney Alonso:

Is a public who has money but lack in culture. They are more interested on the products and facilities the real experience. There is a small percentage of the market who is more experienced. But in general they link luxurious to high prices. They have difficulty to express culture outside Brazil. They have money but don't give much value to culture. They want a good hotel with good structure and all the comfort but don't really give value to the cultural aspects.

Robbert van Hattem:

What about the origin of this market?

Sidney Alonso:

São Paulo is the main spot. Then there are people from the South, Rio de Janeiro, Belo Horizonte, that are the other regions. From metropolis, but also some from the countryside from São Paulo.

Robbert van Hattem:

What about the age?

Sidney Alonso:

The younger are mainly focused on USA and Europe. The most experienced ones like more exotic destinations. And there is a new class of younger people who are explorers. This one's likes to go to Africa... This one are in the age of 30, 35... 40 years old. They are exploring alternative trips and with comfort.

Robbert van Hattem:

About needs and wants, what does this market looks for?

Sidney Alonso:

Many of those are looking for a lot of comfort. Flexible time for services as breakfast, restaurant. And they look for experiences that the hotel or the destination can offer. They want to feel that the place they are is ready to serve them and give them a good experience.

Robbert van Hattem:

What about the transportation? Think, for example, about the flight to Zambia, where there is a stop in Johannesburg.

Sidney Alonso:

Well, I don't see Zambia as a standalone destination. This should be really clear to the ZTA. No one would go to Africa only to go to Zambia. Zambia would be a substitute for the East of Africa, that is the Safari part, but most of the people will reserve many days of the trip to do something in Cape town, Garden Route or other South Africa places. So Zambia cannot be seen as a standalone destination. Zambia would be a substitute for a Krueger park or a Sabi Sabi. A nature exploration alternative. This because they don't have the attributes of a metropolis or a gastronomy centre or a cultural centre, at least there is a really specific tourism like for example a migration of a species crossing the Zambezi or something like this, but this is really specific.

Robbert van Hattem:

Ok, about Brazil now. Do you see any opportunity at the moment? What are the tendencies in the market?

Sidney Alonso:

Well, one of the most important tendencies is to sell the product with an experience connected with the main aspect of the trip. It is really important that the traveller stays near what everything happens. The traveller wants to be near; they don't want to waste time on transportation. They like to feel exclusive, to feel they have something that not many people could have. The service is really important.

Robbert van Hattem:

What about the economy in Brazil?

Sidney Alonso:

Well, the situation is not easy right now. For long term investments it could be hard in the beginning, but it could be good. If you are thinking about short time investment, now is not the time.

Robbert van Hattem:

(Summarize) About sex. males travel more, or females?

Sidney Alonso:

Mainly couples. In Africa, especially South Africa a lot of honeymoon. Is a strong tendency. Family... Not many individual travellers.

Robbert van Hattem:

And age?

Sidney Alonso:

Africa is reaches several groups. Young couples, older people. It is a destination good for all ages.

Robbert van Hattem:

Any specific kind of hotel they would prefer?

Sidney Alonso:

Good service, quality of the room. Localization, attractions...International food. Brazilian can be difficult with food; they need a western kind of food available.

Robbert van Hattem:

Any interest on the local population?

Sidney Alonso:

They would not really interact with the locals. Maybe some younger people will but it is not really important.

Robbert van Hattem:

(summarizing) Anything to add?

Sidney Alonso:

It is really important to make a good segmentation of the market.

Robbert van Hattem:

(Thank you)

Interview 9:

Organisation: Original Way

Contact: Jaiana de Bertoli

Address: Av. Dr. Nilo Peçanha, 1851.

Postal code and Place: Porto Alegre, Rio Grande Do Sul

Phone number: +55 (51) 3072 – 6316

Email: jaiana.bortoli@originalway.com.br

Robbert van Hattem:

(Small talk + Introduction) Well I would like to start asking about your experience in the market.

Jaiana de Bertoli

The agency, Original Way, will be 7 years old in August. Before that I worked in a tour operator. So I have about 9 years of experience in this market. With the luxurious market we started working about 3 years ago. This market is a bit difficult to get into, experience and contacts is important for that.

Robbert van Hattem:

I would like to ask you how would you describe the Brazilian Luxurious market?

Jaiana de Bertoli

Is a client with a high income? High middle class, normally business people or wealthy farmers... Demographically... I work more with the Porto Alegre public. We work mainly with people who travels abroad.

Robbert van Hattem:

Could you describe them psychologically?

Jaiana de Bertoli

There are two kinds, the ones who already travels a lot, and would even repeat a travel getting a better experience. And there are the ones who just became rich and would choose for mainstream destinations. However, I would consider "Luxury" the experienced ones. Because luxury goes beyond only good hotels and services. And there are also some really new travellers who just started travelling in the middle class.

Robbert van Hattem:

What about the needs and wants of the traveller? Needs towards accommodations....

Jaiana de Bertoli

They are looking for good experiences. Normally they learn about it from friends. They will look for a comfortable hotel, don't necessarily need to be from a famous brand, could be a boutique hotel, for example. They want a good experience.

Robbert van Hattem:

What about the restaurant?

Jaiana de Bertoli

International food is a must. It is really good to have some local food as an option. The interesting thing is to have the things the customer is used to and give them some options. Food is something really important in the trip. The travellers often share their experiences about the gastronomy.

Robbert van Hattem:

Do you have any opinion about the interaction of the traveller with the locals?

Jaiana de Bertoli

It depends on the traveller. In our agency we encourage this. In some destinations the locals are really hospitable and this is really nice, it makes the good experience. But it depends on the traveller.

Robbert van Hattem:

Any trends in the country?

Jaiana de Bertoli

There are all kinds of public. The Brazilians are not really happy right now with the raise of the dollar. It is good to sell destinations where also suffered with the raise of the dollar, like South Africa, Canada... We sell it in dollar, but in the destination it will not be that expensive. Some travellers are staying shorter in a destination...

Robbert van Hattem:

Would you have any tip for the ZTA in this sense?

Jaiana de Bertoli

Brazilians are really curious and they like to share their experiences. They should participate on operator events and launch the product. It is important to know about the flights between Brazil and Zambia, how many times a week? Second, they should get in touch with the operators, they can sell the product. It is important to increase the knowledge about the destination to give more trust to who is selling it here. It is really important to present the destination. It is not really known destination for us. We need to know what kind of food do you have there, if there are good hospitals there.... I need that, I need to know if the destination is safe. There is a great potential, Brazil is huge. Brazilians are really curious and they like to learn about different cultures. But what Zambia needs is to work on the image of the country. There are several events where they could participate in order to present their product. They can work with the operators and also with the government in events like WTM, ABAV, Festuris.... If there are good conditions, good hospitality infrastructure, good flights.... we can sell it, there is a market for it.

Robbert van Hattem:

(Summarizing) Do you have anything to add?

Jaiana de Bertoli

There are big travel agencies in Brazil who works with luxurious tourism, like Teresa Perez, Queensberry... And others who just went bankrupt not long time ago, last year was a terrible year, but it will become better.

Robbert van Hattem:

(Closing and thank you word)

3. Coded content

3.1. First coding

Content retrieved from interview one can be found in yellow

Content retrieved from interview two can be found in bright green

Content retrieved from interview three can be found in turquoise

Content retrieved from interview four can be found in pink

Content retrieved from interview five can be found in blue

Content retrieved from interview six can be found in red

Content retrieved from interview seven can be found in dark blue

Content retrieved from interview eight can be found in teal

Content retrieved from interview nine can be found in green

Information about respondent:

I don't work with co-op, have 10 years of business, and I work normally with middle/high class.

I not really an expert on luxurious tourism.

I don't know how detailed the information you need.... But let's go!

I don't have specialization in this luxurious segment. I work with multi process.

Graduated in Hotel management 3 years ago, I ended up in the travel agency branch with specialization in domestic and international leisure travels and cooperative service. My department is in the national and international groups, incentive trips and luxurious trips with personalized service.

I started my career from working for my dad who owns a travel agency. My function was a tour operator. Later years I started my own company, my company main function is representing local high ending hotel, and my focus is the up class customers. promoting and marketing are crucial. And our main business region locates at South America or EU. However, my clients range wildly.

I have a travel agency and work already longer than 35 years with tourism. I always worked with tourism. My agency has 15 years. We work with luxurious products as well as others. We worked before with cooperative tourism but now we focus only on the leisure tourism.

I own a DMC specialists company. A DMC is private company who receives the tourists in the destination and organizes all the services. We represent 18 international DMC in 40 countries. We work mainly with Asia, Middle East and Africa, also the Mediterranean region. I represent a DMC from Africa based in Johannesburg. They have offices in Kenya, Zambia, Uganda and if I'm not mistaken also in Mozambique. So I need to connect them with the Brazilian operators. So I have a huge knowledge in the Brazilian market. I have about 27 years of experience in this market.

The agency, Original Way, will be 7 years old in August. Before that I worked in a tour operator. So I have about 9 years of experience in this market. With the luxurious market we started working about 3 years ago. This market is a bit difficult to get into, experience and contacts is important for that.

I work more with the Porto Alegre public. We work mainly with people who travels abroad.

Characteristics of Brazilian luxurious travelers:

Demographic characteristics:

normally with middle/high class

of 50 years old, people who are already financially stable. Younger people goes abroad for studies or they go with their parents, in a marriage, or something like that. I would classify it mainly on age.

Here, according to IBGE, we consider a client from "A Class", that is the most affluent class in the market, as a client that makes above US\$45000, – per year. In the pyramid of the social structure in Brazil, there are clients from A class, the ones who earns more than US\$45000, – and this clients, according to the IBGE (the Brazilian demographic research centre in Brazil), is shown that in Brazil there are more or less 3 or 4 million people in this class. So I would like to know from you what is your angle on that.

So, I think this is really important to your research, when you talk about luxurious tourists, what are their income in the year. This number I don't have for you; I don't have specialization in this luxurious segment. I work with multi process. But this could be the first question you could make to Gabriela Otto. What do you call luxurious tourism considering the income of a household? She will then extract from this 4 million, approximately about I don't know.... maybe 500.000 people or 1 million.... people who earn let's say US\$300.000, – a year and then, yes, considered luxurious tourists to be targeted. So this

is the first point you should research on the affluent on the IBGE, who earn above US\$45.000, – who are really hyper affluent and the top of the top of the pyramid. Or in your desk research

Today the luxurious clients are between 30 and 55 years old, normally couple that has a name (they come from known families)

Traditional group are most likely being older than 50 years old. They travel with family. They have good education background.

The recent group are younger than traditional group. They mostly travel as couple. they could easily spend more money without thinking too much.

Both groups travel a lot, and the percentage rate would be 50% –50% of traditional group and recent group.

They have a lot of money. Older people.

Mainly couples, rarely men travel alone, and women sometimes in groups.

From 45 above up till 75... 80 years old.

Mainly couples. In Africa, especially South Africa a lot of honeymoon. Is a strong tendency. Family... Not many individual travellers.

Africa is reaches several groups. Young couples, older people. It is a destination good for all ages.

Is a client with a high income? High middle class, normally business people or wealthy farmers...

Psychographic characteristics:

, know how to provide from the whole world

use a lot internet

they will look for it during the weekend for a promotion or maybe buy it with miles, and then they look for me to book a resort, or something else more specific. Hotel industry in Brazil, for the public I work with, this they find by them self.

a market that knows Europe already, I've been noticing that mostly doesn't want much packages

They want more "forfeit" than closed packages.

Well, I think that psycho graphically, the Brazilian luxurious tourist is really like the emerging market tourist that has a really limited general culture talking about reading of what is comes to be the experience of the luxury that goes beyond the material and goes to the sensorial so, in a general manner, the luxurious tourist in Brazil looks really like a tourist from an emerging market. More about material then sensorial. And this we can apply to all the luxurious segment. For example, the art, the contemporary or abstract art is less accepted by a luxurious consumer that are just now starting to discover on its acts the taste for art. So the figurative art is much more likely to be consumed by this costumer then the abstract art. There are the luxurious products from more traditional brands, easier the reading by this clients, this consumer. They can appreciate much more a watch from Rolex as luxurious product then other brands that are being appreciated by more mature markets. They prefer to have a contact with more demonstration. And going to the part of consumption of a luxurious product, they prefer an accommodation in a destiny more traditional like the ones from G7, destinations as New York, Paris, London, Miami... They would go to this destination and consume the products developed for this emerging market, Visible brands, traditional brands hotel brands rather to try and experiment something sensorial in his experience. To summarize: today the Brazilian luxurious tourist is more material then sensorial in his experience. In other hand. There is an important component in the emerging countries and in Brazil it happened on an extraordinary way in the last 10 years, that is the social mobility question. If you talk about the luxurious traveller in Brazil, you are talking about people who didn't had access to this luxurious articles 10 years ago.

When I think about the costumers I have, they are demanding people, where luxury is with hotel, services and gastronomy.

They want the best that there is, the price comes in the end.

Normally they already know what they want... We show the options until it fits best what they had in mind.

They will not make a luxurious travel and stay in a standard room, they will choose for the best.

Really demanding and detailed until the end of the trip.

Dazzle and as much glamour as possible and luxury is offered, helps to call attention to a destination.

I forgot to mentioned, all services like transfers, trips, everything has to be included (and everything personalized)

I can feel the difference when I see a luxurious costumer, by the car they have, by the clothes, purse.... the way they pay...

It is a client that don't ask for a discount, and many times would not even opt for instalment.

Brazilians always look for service when travelling, I would say they like to be pampered and spoiled. It could be as simple as having a photograph of their family members when arriving at a hotel, what is important is that the clients feels appreciated and not another one in the crowd. But this is in general terms because Brazil is a big country and we have some mature markets and developing ones

When we talk about developing markets, the old feel of luxury is still important.

That is something that is important for the tourist, of sharing, especially now with the social media.

What I see now is there are two main groups of high ending travellers.

First one, I call it traditional one. They are rich the whole life. They belong to the rich people social pyramid; they really pay attention to the quality. They only like to consume good quality goods. For travelling, they must take the first class flight, they would seek for better provider because it means they have good quality.

The second type I call it recent group; this group of people they get rich at recent decades. They find any chance to consume, they are instant consumers. If they have a trip, they would like to not only make the trip enjoyable but also make the trip recognisable. By recognisable, I mean, they like to spend lots of money on brandy stuff, to show another people that they are enjoying a superb vacation.

Moreover, when they go to the best restaurants in town, they like to take lots of pictures and show off later on Social media. This group can be easily recognizing and they want to be recognize as well. (New market)

I divide it in two categories:

The experience travellers: They know what they want and research the destination before travelling in order to take the best out of it. This group can be sub-divided in two other groups, the ones who wants comfort: Normally above 60 years old, spend more time in the destination, like to understand the place. And there are the ones who travel alone and like to explore. This are mainly women, 5 women to 1 man.

The second group is the "Passport stampers": This one's don't even knows where they are going but they know how many countries they are going to visit, and won't even remember where have they been. They love to go, for example, to Antarctica because there they can get many stamps, I won't talk much about this group.

The Brazilian luxurious traveller have the tendency to choose for mainstream destinations. Often they are attracted to a new destination because of its image. Sometimes it is not even about the destination, but a specific hotel in the destination. There is the example of The Palace in South Africa. People would like to go to South Africa and want to stay at the palace to show off to their friends. My advice is to focus on one pull factor within the destination, like the Palace in South Africa. I don't know Zambia, I never sold Zambia. In Brazil we have the Foz do Iguaçu waterfalls, in the past people would go to Foz do Iguaçu not for the waterfalls, but to shop across the borders, now they want to go there and stay at the Bourbon resort. So I would not sell the waterfalls, but the attractions in the park, the hotels ...

Brazilians also loves to buy.

I see people looking for different things. Want to be well served, a good product with a differentiation. They want exclusivity, when in a destination they want to do something that others would not be able to do.

Is a public who has money but lack in culture. They are more interested on the products and facilities the real experience. There is a small percentage of the market who is more experienced. But in general they link luxurious to high prices. They have difficulty to express culture outside Brazil. They have money but don't give much value to culture.

There are two kinds, the ones who already travels a lot, and would even repeat a travel getting a better experience. And there are the ones who just became rich and would choose for mainstream destinations. However, I would consider "Luxury "the experienced ones. Because luxury goes beyond only good hotels and services. And there are also some really new travellers who just started travelling in the middle class. Brazilians are really curious and they like to share their experiences.

Geographic characteristics:

I can't say much because I sell a lot in big city, I sell a lot to the people from Porto Alegre. I know that people in the country side has high income, but I don't know that market. I know from colleagues from travel agencies that sell well but I can't tell you, this is not my market.

I think that the ones from the countryside are increasing. If you compare it with Porto Alegre and Lageado, I think the ones from the countryside has a higher income. There are many that had money from the family and is now investing it on luxurious travel.

The one from the big city has more experience, more friends to who they could compare their experiences, he would also ask for benefits or discounts, and will be more demanding.

The one from the countryside is just starting with the experience, he will impress his friends (who also don't have that much knowledge) he has didn't start to compare values. He just wants the service and will pay for it.

I think the one from the countryside is a good potential.

In the countryside people knows quick that somebody went for a trip and they want it as well.

IBGE indicates that we have a big concentration of the population in a few states. São Paulo has 32% of the Brazilian economy, Rio de Janeiro 11%, Minas Gerais 9% and if you sum up Rio Grande do Sul, you have already 59% of the Brazilian economy. And then I can give you my opinion, if you want to be sure you should do some desk research, I think that with 60% of the income concentrated in this 4 states, I

would say that about 80% of the A class will be in this states. So I would say that probably about 80% of the Brazilian luxurious market is concentrated in this four states.

Well, indeed, Sao Paulo holds the rich people's population. Partially because São Paulo has 20% of the whole Brazilian population there. Besides São Paulo, rich people also coming from south part of Brazil. People there have higher score of willingness to pay.

São Paulo, mainly the state of São Paulo. This is the main traveller's exporter in Brazil. São Paulo, Ribeirão Preto (countryside), Fortaleza. (Where does the Luxurious tourist comes from)

São Paulo is the place where the money is. In the countryside of São Paulo there is a lot of wealth. There are some really rich people in the north east of Brazil. But the main point is São Paulo, the state.

São Paulo is the main spot. Then there are people from the South, Rio de Janeiro, Belo Horizonte, that are the other regions. From metropolis, but also some from the countryside form São Paulo.

Needs and Wants of the Brazilian luxurious travelers:

Services:

Service: Private, exclusive and many times unusual tours

About the wants on the pre-sales and after-sales: all the support, personalized route, 24h telephone availability for emergency case, after-sale a return treat.

In an example, I had a couple who went to the Maldives at Conrad, they stayed at the best bungalow because there was a private swimming pool with access to the sea, exclusive dinner at the island, privet only for the couple, dinner at the aquarium where it has to be reserved with at least 3 months beforehand, private diving with instructor and certificate....

Normally they have the package all inclusive. For example, next week there is a marriage in Punta del Este. My client will stay in the Fasano, the whole family with the babysitter for the kid. I need to make the appointment for them on the hair dresser... everything arranged.

So the exclusivity and the differentiation is something important. So when they visit a Louis Vuitton in Paris for example, they don't just want to visit the shop, but they want to be recognized for being the first ones to enter the shop. When they go to Disney then want to be the first ones to get access to the parks and they will pay for it.

it works a lot with the local receptive that speaks Portuguese, emerging Brazilian luxurious travellers can't speak English, they have difficulty with the language, so they try to work with local receptive that speaks Portuguese.

The ones who seek comfort would usually choose for excursions in small groups, normally with a guide accompanying from Brazil, with the tours already settled

They are looking for good experiences. Normally they learn about it from friends.

Accommodations needs and wants:

They want beautiful places, they say they don't want luxury, but if the hotel is not good they will say bad things about it when they are back and good service. That is what they want.

Hotels on a good location, infrastructure, concepts, normally form a brand known by a good restaurant quality.

They mainly stay in traditional accommodations, this big hotels and big Palaces... So for this Brazilian tourists the brand is really important. So there are traditional brands like Ritz Carlton, Waldorf Astoria in New York, in Paris the Prince de Galles is the Brazilians favourite. So you have the big Palaces in the big cities, that attract the Brazilian market, because it is a material market and not sensorial. So for them, showing that they spend their vacations in the Prince de Galles is so important as using a Rolex. They want the mass destinations, however, they also want to have a differentiated service to feel exclusive. , they will stay in good hotels (Experienced travellers, comfort)

This one's will normally book the hotel just for the first 2 days of the trip and probably for the last 2 days. They like freedom to change the rout according to the way the trip is going. In new destinations they would like to go in small groups. (Independent experienced travellers)

They don't like to leave home and spend to have less comfort.

There are costumers who says that there need to be a gym, others covered swimming pool.... big rooms.... sometimes they ask for Jacuzzi...

a good hotel, breakfast has to be in the hotel.

Well they want something comfortable in an exotic place. They like to experience new adventures but with the comfort.

They want a good hotel with good structure and all the comfort but don't really give value to the cultural aspects.

Many of those are looking for a lot of comfort. Flexible time for services as breakfast, restaurant. And they look for experiences that the hotel or the destination can offer. They want to feel that the place they are is ready to serve them and give them a good experience.

Good service, quality of the room. Localization, attractions...International food.

They will look for a comfortable hotel, don't necessarily needs to be from a famous brand, could be a boutique hotel, for example. They want a good experience.

Attractions needs and wants:

Let's say it like this: For the couple that is going to Thailand it is normal in a honeymoon that they want beach, they want to enjoy each other in the hotel, so it is like this, if there are other attractions, it would be fine. Of course, as much we can offer, and that the destination is on a good price, to attract more public.

So they want this mass attractions and are willing to pay more for that, but they don't have the curiosity to meet more than a Broadway, more than an East London or more than the Cirque du Soleil. Alternative programs on a more sensorial manner, does not make part of the agenda of this tourists.

They want to have the best thing that place could offer and they are willing to pay. They consume instantly and they are more attracted by the most super facial attraction. Also they are more easily attracted by main/ mainstream activities (New market)

The independent one's research well the destination in order to choose where to go and generally they are not happy to go to usual places where others go just for the passport stamp, they want something different, unique.

Because most of the travellers are older they would not like to have extreme activities. They would rather have something like a drive safari.

Even knowing about other nice places to be discovered they still want to go to see the fauna, the animals... Like Kruger, Mala Mala, they want as much as possible luxury in an exotic place. For example, a group who went to Botswana, they ride elephants, this thing is amazing for them. Well there are the younger, the older.... going on a balloon.... Always with safety of course. So the balloon that goes from the safari or sleep in a tent... this exotic thing is appreciated.

Restaurants needs and wants:

The traveller will like to try the local food, but international food is a must... They really ask for it. We also always ask our customer whether they have any restrictions towards any food. Then we can already let the hotel know about it avoiding problems. They prefer A la carte service; buffet is not really well seen. They will normally eat at the hotel. When we make a personalized trip, we also offer options outside the hotel, however, it has to be a really good restaurant, otherwise we don't even offer.

Many of those, don't dare to try the local food with concern of having food poison (Experienced travellers, comfort)

they want a good restaurant in a good location

International food is a must, they like to try local food, but it has to be a good chef, with the chef, has to be safe.

Brazilian can be difficult with food; they need a western kind of food available.

International food is a must. It is really good to have some local food as an option. The interesting thing is to have the things the customer is used to and give them some options. Food is something really important in the trip. The travellers often share their experiences about the gastronomy.

Entertainment needs and wants:

. In terms of entertainment, they are much more interested in this mass entertainment like for example Cirque du Soleil, this great spectacle from east London, this one that are visited by all the tourists, so they are interested in mass entertainment.

well, from my point of view I think first the traditional group, they seek more privacy, seek more pleasure and maybe a trip with more educational meaning. Second, for the recent group, they are definitely looking for recently-famous brands, because those brands are highly recognizable and have a good reputation. Then it is easier for them to show off by using those brands reputation. It is very important for this group to be recognizable. Normally if those who travel are younger couple, they would like to enjoy new experience and try different things. But for old couple, they would mainly enjoy more about good qualified food or have a good rest.

Transportation:

It depends where. For example, in the United States, people use a lot car... going to Miami, you take a car. You go to Canada, you may take a car or not, it depends... Amsterdam or Paris it is not possible... there is no need... So it depends on the country, there is need or not.

Normally they want the flight in an executive class, if the option is not available then an option with a comfortable seat and they have Infinity or Amex cards that give them access to the VIP lounge at the airport.

If there is a car rental, they want the best category

They will always choose the shortest possible flight with as little as possible connections. When we combine destinations we combine up to two different destinations in one travel.

It will be a transportation that matches this kind of group. It will be private transportation

Brazilian like to travel, they will like to have the business class. Brazilians loves to share, to show, to take pictures in the business class to show their friends they are travelling in this class.

They rent a car, go by train and make their own discoveries. (Independent experienced travellers)
executive class on the flight.

They prefer to have direct flight, but if there is no other option, they will use the connection. They would not mind by using train in the trip as soon as all the way there is someone to guide and the trip is not too long.

Well, one of the most important tendencies is to sell the product with an experience connected with the main aspect of the trip. It is really important that the traveller stays near what everything happens. The traveller wants to be near; they don't want to waste time on transportation. They like to feel exclusive, to feel they have something that not many people could have. The service is really important.

Interaction with locals needs and wants:

they want to be received well in the transfer, they want the hotel to treat them well, and they want the locals to receive them well, because the Brazilian people receive well the travelers. I will give you an example in Paris. My husband speaks French, we were well treated, next to us there was someone who could only speak Italian... The waiter didn't even cared about her and didn't treat her well, there is mean less.... Just because she couldn't speak their language. But Zambian people must treat well.

Well. They want a friendly reception. Normally luxurious hotels have already well trained staff that all extra services needed.

I think they are much more about following the program then interacting with locals. Also because of the language, it makes it not easy.

And if they travel, they want to learn about destination's culture, they like to interact with local people.

(traditional group)

They like local guides who knows about the destination and who can tell a nice story about it, showing the deferent architecture from different ages. And just interact with people from the excursions.

(Experienced travellers, comfort)

Try local food, and they want to know the local population. (Independent experienced travellers)

They have to receive the traveller well. Brazilians complain a lot about the French for example that they are to direct, also the Italians... Brazilian like to feel well received, they are a warm culture, just not too much in order to keep the traveller's privacy.

They would not really interact with the locals. Maybe some younger people will but it is not really important.

It depends on the traveller. In our agency we encourage this. In some destinations the locals are really hospitable and this is really nice, it makes the good experience. But it depends on the traveller.

Image of Zambia:

(Zambia) It is not a known destination, it doesn't give confidence to the people, Europe gives more confidence, Zambia... So there should be something to be offered and we would have all the support from you.

I've participate on an event that South Africa does, that showed South Africa till the Cape of Good Hope, really interesting. Because what happens... a tip: for us to propagate a new destination the tour operators would invite us for a breakfast, a dinner... and show the destination, the world is enormous... so for us to know and choose, it is like this, we need to know a little bit. South Africa has showed the Cape of Good Hope, for us is something unusual. So from Zambia, I think it is just the animal part, the animal kingdom, I have this information, don't know anything else.

The animal kingdom, like in the "Globo Reporter", that show also a bit of the local population... because we mix it up with Africa in general.

I think that the part of the country, the natural beauty, they are really well seen.

Africa, I know it is not there, but there is the problem of ... that disease ... Ebola

No, Zambia has low demand. It is like this, In Africa, people think about South Africa, not Zambia. They think about South Africa, maybe Algeria... something like this, not Zambia. So, if there is a package, South Africa, with extension till Zambia, people will go there and will come back saying that it is beautiful.

Zambia does not have an image of mass tourism destination and that is why it does not mean nothing to this new emerging traveller. I'll give you an example: A friend of mine who is from this group that shift from B class to A. He was telling me a month ago, that wanted to make his dream true, that is to make a safari in Africa as marriage celebration. So I told him that in a safari in Africa he should go to Botswana, Namibia, you need to visit central Africa because there are interesting products and equipment... But she said "No! I want to do Safari in South Africa" ... I want to go to safari there because there is the safari from the Kruger National Park, etc.... So, they have the money to go to central Africa, but for them it will be much more recognized if they say that they went to South Africa and stayed in that resorts "of mass" then if they go to a more sensorial experience in Namibia for example but for them it is still quite early consume it. They would rather stay in the palace from South Africa then going to a safari in the central of Africa that would be much more original. But this is a natural process, as soon as they are tired of this common places, this industrial destinations, then they will start looking for other destinations and then it comes the opportunity to get to know Zambia and do some different tourism

About Zambia, not many Brazilian know, let alone about real travel trends there. Zambia now is not recognizable, only few number of people know about Zambia. I do think Zambia should start to build destination awareness, start to do the marketing.

South Africa is well known here, they come every year and show their destination to the travel agencies and the travellers, they do a really good job here. Moreover, they would not go to Zambia for safari if they could also do it in South Africa. Zambia should find an USP to sell to the Brazilians. Could be something like "this is the place where the Nile is born", I don't know.

Well, I will put it like this: I had a passenger who said he wanted to go to South Africa, "what do you have in South Africa?" Then I explained "And in North Africa?" ... When talking about Africa, the first think that comes up in mind is South Africa. I try to suggest other places in Africa to my costumers, but they don't even know other places.

Africa is a destination a bit more economic, even in the luxurious segment and today it is expensive.

Well, I don't see Zambia as a standalone destination. This should be really clear to the ZTA. No one would go to Africa only to go to Zambia. Zambia would be a substitute for the East of Africa, that is the Safari part, but most of the people will reserve many days of the trip to do something in Cape town, Garden Route or other South Africa places. So Zambia cannot be seen as a standalone destination. Zambia would be a substitute for a Krueger park or a Sabi Sabi. A nature exploration alternative. This because they don't have the attributes of a metropolis or a gastronomy centre or a cultural centre, at least there is a really specific tourism like for example a migration of a species crossing the Zambezi or something like this, but this is really specific.

Trends:

Kind of trips:

What they are looking for now more often, is for cruise ships. This is something more difficult to be found on internet and then they come to the travel agency.

The opportunity that I am trying to get is to make packages to this new destinations, that people would like and won't go alone. For example, let's say I make it with Zambia... They don't know how to go alone.

So, I would make a package to offer them. Because... Then they go to Canada... to Patagonia

In more mature markets we see a trend toward experience travel, as this clientele has travelled for a longer period in their lives and experienced the most know places, reason why they are looking for the unbeaten path.

On the pure wish to travel I would say experience trips are getting bigger such as bike tours, expedition cruises, river cruises and cultural destinations.

I just remembered that last Friday I sold Ponta dos Ganchos, 2 nights. R\$16.000 (about U\$ 4.000, -) Only breakfast included... It is not anyone who would pay for that. The payment was upfront. Who understands that? The market is weak, but still there!

Economy:

Things can vary, because we are in a serious recession (here we don't talk about recession, here is everything ok).

Even with the dollar price going up, my passengers travel, they spare. If they use to do 2 trips per year they will do only one, if they use to one trip per year, they will do one each two years, but they will travel.

What stands up is the "shitty" dollar that is rising... From Thursday till today... I'll give you an example, I am trying to make a group, in a package, to go to Israel, every year I do it, today a sir, that has no finance problems, used that as excuse to postpone his trip. So it is obvious that this influence people buying power, so that is the main thing, it is not insecurity, it is not... nothing. I guess is basically, what is influencing is the dollar thing, that it is getting going up.

So what happened in the last 10 years is that occurred a really intense process of social mobility in Brazil. IBGE also indicates that. I will also send you a link about this phenomenon (https://www.bcgperspectives.com/content/articles/center_consumer_customer_insight_globalization_

redefining_brazils_emerging_middle_class/?chapter=5#chapter5) It says that there were in 10 years, between 2000 and 2010, 10 million new consumers that change from one class to another. It is a lot said about the shifting to the C class, but there was a really strong shift on the A and B classes. For example, according to IBGE this 4 million of consumers considered affluent from 2010, 10 years before they were just half of it. So we had people from C class that went to B class people from B class that went into A class and people from A class that got even more affluent. So, connecting to what I said before saying that the luxurious traveller is more material then sensorial... They don't have culture; they are consumers that didn't have the chance yet to get in-depth on this culture experience in order to increase the sensibility beyond what they now can realize when they see a watch or a hotel or determinate tourist destination. So the social shift phenomena are directly related to this material necessity for the consumer, to have a product that makes it sure for him to have a social recognition as a luxurious consumer who pays high etc. As much you work with stabilized markets that already known to this material consume more you will find other consumers that don't want the common brands, mass destinations then you will find many other consumers who would be much more interested on the niche destinations, boutique destinations then this traditional destination like Paris, London, etc. Then we talk about other destinations, like Africa for example, safaris, Zambia, emerging destinations... Destinations that fit to this new luxurious consumer that will look for something completely different than their parents, who were the emerging ones.

Travel trends in Brazil are not only related to destinations per se but also to economic aspects, such as currency fluctuation. In 2015 we saw the dollar going from 2.7 to 3.9 in just a few months and this variation was reflected on tourism: more Latin America and national travels.

I believe the potential is huge, however we are in a recession right now.

The economy is really slow... unfortunately!

I believe that it should improve only after the second half of 2016! People will "Get used" to the situation. They will then start to travel and entertain themselves. Right now they are afraid of getting in debt.

With the Brazilian crisis there is a retraction in the consumption of luxurious tourism. But if you talk about trends, once this crisis is gone, and we believe that in 2017 or 2018 it will start improving.

During all the time I have been working in the tourism industry (30 years) the luxurious tourist never have been down. But today even this market is suffering with the crises. It is a lack of political perspective as well as economic this market is reducing. The ones who can, are moving to the USA, Canada, or even Europe to run away of the crisis. This market is stagnated as soon as the situation improve the luxurious tourism will be back to normal again.

We have to change the president, before that it will not change. She could fall this year, or next year... Today is stagnated. I think it is not the right moment to invest on the Brazilian Market, maybe after the half of 2016.

The tendency for 2016 is not good. It is everything too expensive now because of the dollar. Brazilians really like to travel and they are adapting themselves to the situation. They reduce the number of days in a trip, travel less times, but they don't stop travelling. In general, it is really heavy now. There are still people with the trip booked, so we are still busy, but they are quite worried with the tendencies. And then there is the Chinese crisis to make it worse...

Well, the situation is not easy right now. For long term investments it could be hard in the beginning, but it could be good. If you are thinking about short time investment, now is not the time.

There are all kinds of public. The Brazilians are not really happy right now with the raise of the dollar. It is good to sell destinations where also suffered with the raise of the dollar, like South Africa, Canada... We sell it in dollar, but in the destination it will not be that expensive. Some travellers are staying shorter in a destination...

There are big travel agencies in Brazil who works with luxurious tourism, like Teresa Perez, Queensberry... And others who just went bankrupt not long time ago, last year was a terrible year, but it will become better

Destinations:

Actually people are looking like this: A lot USA, they look a lot for the United States, and a lot for new things like Thailand, (my passengers, I'm talking about my passengers), Thailand... They look for Amsterdam, that neighborhood... London... Europe... Once we have a flight from TAP, it is really easy for people to go, so to that part from the Iberian Peninsula, people are doing alone, they don't need travel agency, mine not. Today, for example, there was a couple here that was celebrating her 50 years and they are going for a cruise in Greece, they are boarding on the 2nd. Another sir boarding on the 1st, is going to Portugal, but he is 80 years old, so he has to go with a group, he can't go alone. So each thing... But most are looking for packages like that, differentiated, something new.

At this time with the raise on the Dollar value the main focus is on selling domestic destinations with a higher standard. Specially now with the Olympics coming up, I see all this groups who will work in the tourism.

It depends... If you are talking about middle class travellers, they want to still travel but for the lowest price they can get. It doesn't matter the class in the flights, flight company etc... The higher class is staying often in Brazil.

The tendency is to look for new destinations, there will be a search for new destinations. That is natural, once they had consumed this mass tourist destination they will try to find something new. Brazilians really like to travel and once they discovered everything in the traditional destinations they will look for something new, and then we are talking about emerging destinations, hotels design, independent hotels. The next step for this luxurious market is to look for new destinations. As soon they get more mature as consumer they discover than more than the material there is also the sensorial and this small boutique destination can offer this sensorial. It is really interesting this way of you to try to find the match with a destination that is so distant from the Brazilians like Zambia but that can still become the favourite destination of this more matured consumers

Today people who were planning to go to Dubai, for example, are going to Porto de Galinhas, afraid of the unstopped raise of the dollar.

People are trying different places. New destinations like Vietnam, Cambodia, Asia in general, Bali. They are trying this different places. We still sell Australia, New Zealand. But what is growing a lot are this places in Asia. Africa has been better.

The younger are mainly focused on USA and Europe. The most experienced ones like more exotic destinations. And there is a new class of younger people who are explorers. This one's likes to go to Africa... This one are in the age of 30, 35... 40 years old. They are exploring alternative trips and with comfort.

Other trends:

Tourism in Brazil is too expensive, if you go from south to north east you will pay more than going to Miami, finding a promotion. I think that, my passengers, the trend are new destinations, sincerely, I haven't thought about Zambia. New destinations as... not really new... Russia... Indonesia... India... you know... because they are looking for something else

I believe the Market will only grow.

Tips for the ZTA:

It is a good idea to start showing the destination, mainly to the travel agencies, because they are the ones who sells this kind of destinations. A good way of starting is presenting Zambia here as a destination, not now but at least after the second half of 2016. And focus in something different that Zambia has. For safari people go to South Africa.

It is complicated, there is no knowledge about the rest of Africa. The best option is to sell South Africa with other destination, like Zambia. The problem is that there is no huge demand on it and the tour operators would charge too much for something like this. The best idea is to follow the example of South Africa. They are doing a really nice job. They take influential people in Brazil and take them to get to know the destination

We need new products. In order to take people for your product you need to sell it. Of course you need to have some differential. There are also younger people who travel with this market, and Africa is a nice destination for younger people. However, there is no hotel in Africa that receives, it is difficult to find a hotel that sells a room for a couple with two kids for example.

When Brazilians think about honeymoon they think about Tahiti, the Maldives. For a destination like Africa... When I talk about kids I mean teenagers. This luxurious traveller sometimes wants to take the kids with them for a nice trip. The kids are too old to go to Disney, so Africa could be an option. Especially if you can combine a radical activity with something softer. We look a lot for destination that we can sell for older people with young together.

When we sell Africa we always sell Johannesburg. In order to get to Cape Town from Brazil you have to go through Johannesburg.

It is really important to make a good segmentation of the market.

They should participate on operator events and launch the product. It is important to know about the flights between Brazil and Zambia, how many times a week? Second, they should get in touch with the operators, they can sell the product. It is important to increase the knowledge about the destination to give more trust to who is selling it here. It is really important to present the destination. It is not really known destination for us. We need to know what kind of food do you have there, if there are good hospitals there.... I need that, I need to know if the destination is safe. There is a great potential, Brazil is huge. Brazilians are really curious and they like to learn about different cultures. But what Zambia needs is to work on the image of the country. There are several events where they could participate in order to present their product. They can work with the operators and also with the government in events like WTM, ABAV, Festuris.... If there are good conditions, good hospitality infrastructure, good flights.... we can sell it, there is a market for it.

3.2. Second coding

Main questions	Sub-questions	Open codes
Brazilian luxurious travellers characteristics	Demographic characteristics	middle/high class
		Financially stable
		Younger with parents
		Students
		Couples
		Mostly around the 50's
		between 30 and 55 years old
		older than 50 years old
		travel with family
		Good educational background
		Couples
		Impulsive spending
		wealthy people
		Couples
		more women than men

		age between 45 and 75
		couples
		honeymoon
		family
		rarely individual travellers
		Africa destination for all ages
		middle/high class
		business people
		wealthy farmers
	Psychographic characteristics	Knows about destinations
		use internet frequently
		look for promotions
		use air miles
		research before travelling
		goes for resorts
		knows Europe
		forfeit packages
		Emerging travellers
		limited culture
		material Vs Sensorial
		not much interest in abstract art
		Traditional brands interest
		traditional accommodation
		likes visible brands
		material Vs Sensorial
		Emerging travellers
		demanding people
		price is not important
		forfeit packages
		demanding people
		all inclusive
		personalized packages
		show-off
		price is not important
		Service is important
		exclusivity
		mature Vs developing travellers
		developing = old feel of luxury
		use of social media
		Traditional Vs New travellers
		traditional = quality
		tradition = 1st class flight
		New travellers = impulsive spending

		New travellers = show off
		use of social media
		Experience travellers Vs passport stampers
		Experience travellers = knows about destination
		Experience travellers = comfort Vs Explorers
		Comfort = 60 +
		Comfort = spend more time in a destination
		Comfort = knows about the destination
		Explorers = individual travellers
		Explorers = mainly women
		Passport stampers = not luxury travellers
		mainstream destinations
		Value image
		show-off
		shopping culture
		Service is important
		differentiation
		exclusivity
		wealthy people
		limited culture
		material Vs Sensorial
		experienced = small percentage
		luxury = high price
		culture is not important
		Traditional Vs New travellers
		traditional = repeat destination (quality)
		New travellers = mainstream destination
		Traditional = Luxury
		Traditional = more than just good service
		use of social media
	Geographic characteristics	Countryside and big cities
		increase on countryside
		wealth from previous generation in the countryside
		big city knows more about prices and will compare
		big city more demanding
		people from countryside starting to travel
		people from countryside will spend more
		good potential in the countryside
		month to month marketing efficient in countryside
		wealth concentrated in Sao Paulo (32%)
		Wealth concentrated in Rio (11%)
		Wealth concentrated in Minas Gerais (9%)
		Wealth concentrated in Rio Grande do Sul (7%)

		A class mainly concentrated on (SP, RJ, MG, RS)
		Mainly in Sao Paulo
		Sao Paulo has 20% of Brazilian population
		People from the south spends relatively more
		Sao Paulo
		Sao Paulo, Ribeirao preto, Fortaleza
		Sao Paulo
		Some really wealthy people in the north east
		Mainly in Sao Paulo
		Mainly in Sao Paulo
		South region
		Rio, Belo horizonte
		Sao Paulo city and countryside
Needs and wants of the Brazilian Luxury segment	Services	Private
		exclusivity
		unusual
		pre-sales
		after-sales
		support during trip
		personalized routes
		24hours telephone contact
		Emergency assistance
		after-sales
		exclusivity
		known hotel brand
		The best option available
		Privet access
		package with all inclusive
		exclusivity
		differentiation
		visit famous brands
		easy access
		Emerging market = no English
		comfort = excursions in small groups
		comfort = would like Brazilian guide
		Good experiences
	Accommodations	Appearance Is important
		comfortable
		critical people
		good location
		infrastructure
		nice concept
		known hotel brand

		good restaurant in the hotel
		traditional accommodation
		big hotels
		big palaces
		Brand is important
		material Vs Sensorial
		show-off
		differentiation
		exclusivity
		experienced comfort = good hotel
		Experienced independent = flexibility
		comfort
		gym
		swimming pool
		big room
		sometimes even hot tub
		Breakfast included
		comfortable and exotic
		comfortable and adventure
		god structure
		comfort
		culture is not important
		Service is important
		Breakfast included
		restaurant in the hotel
		experiences offered in the hotel
		good service
		quality of the room
		location
		international food
		comfort
		brand is not important
		boutique hotel could be an option
		Good experiences
	Attractions	variety
		good price attracts bigger public
		mass attractions
		price is not important
		The best option available
		no interest on non-famous spots
		New travellers = mainstream activities
		independents = uniqueness
		no extreme activities for the majority (old)

	Restaurants	Diving safari (old)
		local food is interesting
		international food is a must
		possibility to choose for special food
		Ala carte is the favourite
		Self-service in not well seen
		eat in the hotel
		outside the hotel only in outstanding restaurants
		Comfort = normally don't dare to try local food
		good restaurant
		good location
		international food is a must
		local food is interesting if the chef is good (safety)
		international food is a must
		international food is a must
		local food is interesting
		options
		food is important
		share food experiences
	Entertainment	mainstream entertainment
		traditional = privacy
		traditional = educational meaning
		new travellers = famous brands
		new travellers = good reputation
		new travellers = recognition
		younger couples = adventure
		older couples = more comfort
	Transportation	Car rental could be an option
		first class flight
		make use of VIP lounge (airport)
		best category on car rental
		shortest possible flight
		As little connections as possible
		combining destinations is possible
		privet transportation
		business class flight
		show-off
		independent = Car rental could be an option
		independent = train is an option
		executive class flight
		direct flight preferably
		connections are acceptable (if there is no other opt.)
		Train is fine if guided and not too long trip

		least transportation as possible (location is important)
		transportation is waste of time
	Interaction with locals	Hospitable people
		Africa has an image of being hospitable
		friendly reception
		prepared staff in hotel (hospitable)
		no much interaction
		language barrier
		Traditional = wants interaction
		experienced = likes a nice story from locals
		experienced = interest in local culture
		independent = interest in local culture
		good reception
		French is seen as no hospitable
		hospitability of locals gives good experience
		depends on the traveller
Image of Zambia	Image in Rio Grande do Sul	not known destination
		needs contact with travel agents
		South Africa is known
		South Africa is doing good job in Brazil
		Zambia has some image for its wild life (not more)
		image of Zambia mixed with Africa image
		Beautiful natural resources
		Ebola is related to Africa
		not stand alone destination
		Safari
		Zambia could be combined with south Africa
		nature based destination
	Image in Sao Paulo	migration of species
		no mass tourism image
		not destination for new travellers
		not really known in Brazil
		South Africa is well known
		no Zambia USP is known
		Africa is the same as south Africa in Brazil
		African destinations where cheaper in the past
Trends in Brazil	Kids of trips Brazilians make	often cruise ships
		travelling with travel agents to new destinations
		Canada
		Patagonia
		mature travellers = experience travel (river cruises, bike...)
		domestic tourism

	Economic	Recession
		high dollar price
		least trips per year
		some people postpone the trip
		social shift phenomena
		many new consumers
		interest in European destinations
		high dollar price
		huge potential
		slow economy
		better economy only after second half of 2016
		people now afraid of getting into debt
		crisis should be gone by 2017, 2018
		economy worst in the last 30 years
		political crisis
		investments in Brazil should start after second half 2016
		Bad expectations for 2016
		high dollar price
		less trips per year
		influence of Chinese economy in Brazil
		Bad economic situation
		high dollar price
		destinations who also suffers with high of dollar
		big travel agents are also suffering
	Main destinations visited	USA
		new destinations like Thailand
		Europe in general
		High standards in domestic trips
		Tendency for new destinations
		Brazilians likes to travel
		new destinations like Vietnam, Cambodia, Bali
		Australia
		New Zealand
		increase on sales in Asia and Africa
	Other trends	Africa was more searched in the pass
		youngers = USA and Europa
		experienced travellers = exotic destinations
		younger explorers = Africa
		younger exploders = 30 to 40 years old
		younger explorers = alternative trips with comfort
	Other trends	inbound tourism is not cheap
		new destinations (Russia, Indonesia, India...)
		the tendency is to grow the market

Specific for Zambia	Tips for the ZTA	make the destination visible
		present the destination to travel agents
		preferable after second half from 2016 better
		focus on USP from Zambia
		South Africa has safari already
		Build image
		Sell Zambia with South Africa
		create a demand
		follow example from south Africa
		Show the destination
		Brazil needs new products
		Sell Zambia as a destination in Brazil
		present a differential
		younger people would be a good target
		it is difficult to find hotel in Africa that accept well kids
		honeymoon is more for destinations like Tahiti, Maldives
		Africa is destination for kids, teenagers...
		couples with kids would be a good target
		combine radical activities with something softer
		Brazilians will always travel through Johannesburg
		make a good market segmentation
		Participate in events to launch the product
		learn about flights going from Brazil to Zambia
		close contact with tour operators and travel agents
		present destination well
		Brazilians are curious
		safety is important
		events to participate (WTM, ABAV, Festuris....)
		presented a product with good infrastructure there is market

3.3. Open coding

3.4. New Travellers needs and wants codes

New Travellers Needs and Wants		
Open coding	Axial coding	Selective code
Exclusivity	Superior feeling	High expectations
Differentiation		
Differentiation		
Exclusive feeling		
Show off		
Trendy famous brands		
Tradition accommodations	Preference for the most popular	
Traditional brands		
Stays in big cities		
Mass attractions		
Visit only famous spots		

Only the "best" out of the destination		
International food is a must	Safety	
Private transportation		
Portuguese speaking reception	Low cultural level	Low culture
Follows a program		
Not much interaction with locals		
Has language barriers		
Expensive is always better	Superficial	
Instant consumers		
Superficial attractions		

3.5. Traditional Travellers Comfort needs and wants codes

Traditional Travellers: Comfort Needs and Wants		
Open coding	Axial coding	Selective code
Small groups	Exclusivity	Comfortable environment
Executive class flight		
Access to VIP areas in airport		
Guided trip with reception at the airport		
Preferably with a Portuguese speaking tour guide	Least trouble	
Whole trip with tours arranged in Brazil already		
Good location		
International food in the hotel		
Good service		
International food is a must		
Diversity of food is important		

Least stopovers as possible		
Combine not more than two destinations in one trip		
Could use public transportation in short trips if there is guidance		
Least transportation as possible within the destination		
Not much interaction with locals		
Interaction with locals only during excursions		
Privacy from the traveller is important		
Comfortable hotel		
Good facilities in the hotel		
Good experience		
Food safety is really important (hygiene)		
Many don't dare to try local food		
Rest		
Light entertainment		
no extreme activities		
They are used to the Brazilian hospitality		
Famous attractions		
Other attractions are a plus		
Local food is interesting		
No necessity for famous brand		
They would appreciate a nice story about the locals		

3.6. Traditional Travellers Explorers needs and wants codes

Traditional Travellers: Explorers Needs and Wants		
Open coding	Axial coding	Selective code
Flexibility		
Multiple hotel options		
Interest different attractions (not usual)		
Diverse entertainment options		
New experiences		
Make use of public transportation		
Travel within the destination		
Often rents car		
Tours with smaller groups		
Unique experience		
Knows about attractions beforehand		
Interest about local population		

Interest in the culture		
They like to interact with the locals		

4. Email from Ms Kofi about Zambia products



Doris Kofi <doris.kofi@zambia.travel>

19
jan.

aan mij

Hi Robert,
Kindly see my answers in red below.

Let me know if you need further information. As I am in meetings/workshop whole day every day this week, please WhatsApp for instant replies.

Best regards,
Doris

From: Robbert van Hattem [mailto:robberthattem@gmail.com]
Sent: 18 January 2016 21:12
To: Doris Kofi <doris.kofi@zambia.travel>
Subject: Questions about Zambia Luxurious products

Dear Ms Kofi,

As I mentioned in our Skype meeting. I researched about the Brazilian luxurious market in order to compare it with the products in Zambia. I asked my respondents first, what defines a luxurious traveller for them. So my first question to you is:

–What do you consider as a luxurious traveller?

For me Luxury travel is no longer having 5, 6 or 7 star facilities BUT being able to get what you want delivered to you just the way you want it, that is a luxury! It is an opportunity to luxuriate oneself in a place being visited. Below is an excerpt from a travel expert which I think I agree with more: -

The definition of luxury travel to me is to undertake a new experience and immerse oneself in a new destination whilst indulging in the very best levels of personal and attentive service, lavish and sumptuous accommodation, exquisite and unrivalled levels of gastronomy and informative and educational guides. It is travel without stress, pressure of time or daily routine, where your every need is pre-empted and your every expectation is met and exceeded.” – Gareth Harding, Sales Director at [The Cruise Line Ltd.](#)

I would like to know, what kind of traveller do you expect to come to Zambia. Could you describe the main characteristics of this traveller?

A traveller to Zambia is looking for off-the-beaten-track, paths others have not yet been to, less known but fabulous and amazing in the areas of wildlife safaris, adventures and natural heritage. A traveller who is ready to mingle with his or her hosts because they are friendly. A traveller who is looking a peaceful country where safety and security is habitual.

Further, I asked my respondents to tell about the needs and wants of the Brazilian travellers. This question, was subdivided in six aspects:

- accommodation facilities,
- tourist attraction sites
- restaurants
- entertainment
- transportation
- local inhabitants

I would like to know, what kind of products does Zambia has and would provide for the luxurious market. This information I will mainly collect by desk research. However, it will help me if you could summarize what are the main luxurious products in Zambia, taking into consideration the aspects above mentioned.

Literally, the luxurious places to visit would be the Victoria Falls and national parks where luxury in terms of utmost comfort and exclusivity is guaranteed. Some of our most renowned luxury facilities include

Royal Livingstone, David Livingstone Safari Lodge, Sussi and Chuma, Chinzombo Safari Tented Camp, Chichele Presidential Lodge, Royal Zambezi Lodge just to mention a few.

Restaurants

Zambia has several themed international restaurants serving both local and international cuisine such as Oriental, Western, Indian, Mexican dishes just to mention a few. Most foreign cuisine is served through A la carte.

Tourist attraction sites

As most tourist attractions are natural, they are minimally disturbed to preserve the natural state.

Entertainment

There are several entertainment facilities in major cities which have modern equipment and have international standards. Live performances are becoming a part of most accommodation facilities.

Transportation

Transport is available through public transport operated by the private sector – scheduled departures for bus coaches to major towns and cities, car hire services for both small cars and 4x4s, scheduled air services, air charters and a railway service which is undergoing a major upgrade.

Finally, I asked my respondents about trends of the market, some tips they may have for a tourism board who would like to invest on attracting Brazilians and I also got some information about the image of Zambia.

With all this information, I will be able to find matches between products existing in Zambia and the needs and wants of the Brazilian travellers. In addition, I will also be able to show the needs and wants of the Brazilian traveller and their main characteristics.

Hope to hear from you soon.

Best regards,
Robbert van Hattem

5. AAOCC

AAOCC—Four Criteria for Evaluating Web Pages

Criteria for Evaluating a Web Documents	Ask Yourself...
1. Accuracy and Authority of Web Documents <ul style="list-style-type: none"> You check for accuracy when you find an author or publisher to take responsibility for the information. If the author provides contact information such as email, address and/or phone number, he/she takes responsibility. If research is being used, the author should provide a bibliography that supports what he/she is saying; this also helps the reader determine accuracy. If there is no author given, determine if the page is associated with or published by a group or organization that is taking responsibility. The domain name may give clues to this. Once you know who is responsible, check to see his/her credentials give the person authority to publish the information. What are the qualifications that this person or organization possess and are they prominent enough to be trusted? The purpose of the document should be clear. Why was it produced? The information needs to make sense and should be something that can be verified. Text should be free of errors and feel reliable. 	<ul style="list-style-type: none"> Who is the author? Is there an address, phone number or email given? (Some way to contact author) Who publishes the website? A publisher? An organization? A group with a biased viewpoint? What is the URL and what does this tell you about the publisher of the site? .gov? .org? .net? .edu? What qualifications does the author have? Or what qualifies the group to publish such information? Is the information verifiable? Is the text free of errors, well written and cited properly?
2. Objectivity of Web Documents <ul style="list-style-type: none"> The goals and objectives of the document should be made clear. The page should be objective or unbiased about the subject covered. Bias should be stated as such. If the author's opinions are stated, they should be well substantiated and should not be presented as fact. The motives of the piece should be transparent. View each webpage as if it were an infomercial on television—be skeptical. 	<ul style="list-style-type: none"> Is the page a mask for advertising; if so, how might the information be biased? Why was the page written (motives)? Who is the intended audience? Are opinions backed by accurate facts and information?
3. Currency of Web Documents <ul style="list-style-type: none"> The information should be up to date and there should be an indication that someone is taking care of the site. For example, if a number of the links no longer work, this is one way to tell. 	<ul style="list-style-type: none"> When was it produced? Last updated? How many dead links are there? Is the information outdated?
4. Coverage of Web Documents <ul style="list-style-type: none"> There is breadth and/or depth to the topics covered. You should have not problem viewing the information properly—not limited to fees, browser technology, or software requirement. 	<ul style="list-style-type: none"> Is there breadth and/or depth to the topics covered? Is the information free or is there a fee to obtain information? Are you able to view the page or is software missing? Is that software free?

Sources: Kapoun, Jim. "Teaching undergrads WEB evaluation: A guide for library instruction." *C&RL News* (July/August 1998): 522-523.

6. Interview guide

Interview guide:

- **Turn on Recorder**
- **Ask preferred language**

Introduction:

I want to thank you for taking the time to meet me today

My name is Robbert van Hattem. I am a final year student at Saxion University in Deventer doing my graduation thesis about the Brazilian Luxurious market as potential target for the Zambia Tourism Agency. As agreed previously by email, this interview is being recorded and will be used as input for the research. During the interview, that takes at least 30 minutes, I'll make some questions about the Brazilian luxurious traveller's characteristics and desires, as well as trends and developments within the Brazilian Luxurious travel market.

All responses will be kept confidential. This means that your interview responses will only be shared with research team members and we will ensure that any information we include in our report does not identify you as the respondent. Remember, you don't have to talk about anything you don't want to and you may end the interview at any time. Are there any questions left before I start with the questions?

Questions for the interview:

➤ **How would you describe the Brazilian luxurious travellers?**

- Demographic (gender, age, income and education level)
- Psychographic (attitudes, life Style, values)
- Geographic (Origin)

○ **Summarize characteristics:**

➤ **What are the desires of the Brazilian luxurious travellers when travelling overseas?**

- Accomodation
- Attractions
- Entretainment
- Transportation
- Local population

- **Summarize needs and wants:**

➤ **In general, what are the trends and developments of the Brazilian Luxurious Travel market?**

- What can we expect from this market in the following years?
- What kind of businesses are taking place in this segment?
- Who are the main players?
- How is the economy going?

- **Summarize Trends and developments:**

Is there anything else you would like to add?

➤ **Thank you for your time**

I'll be analysing the information you and others gave me and submitting a draft report to the organization in one month. I'll be happy to send you a copy to review at that time, if you are interested. Thank you for your time.

7. Brazil Country fact file

Areas

8,511,965 km²

Population

205,230,000

Demographic and economic indicators

	2012	2013	2014	2015	2016
Real GDP Growth (% growth)	1.9	3.0	0.1	-3.7	-2.7
Inflation (% growth)	5.4	6.2	6.3	9.0	7.1
Population Aged 65+: January 1st ('000)	14,528.5	15,087.7	15,680.1	16,303.7	16,993.0
Population Density (persons per sq. km)	23.8	24.0	24.2	24.4	24.6
GDP Measured at Purchasing Power Parity (international dollar million)	3,082,017.0	3,218,198.0	3,275,799.0	3,183,826.8	3,119,630.4
Consumer Expenditure (USD million)	1,469,081.7	1,476,960.7	1,465,395.7	1,095,799.3	1,080,065.1
Annual Gross Income (USD million)	2,023,732.2	2,036,417.0	2,018,379.1	1,508,484.6	1,486,352.2
Annual Disposable Income (USD million)	1,615,568.2	1,633,015.3	1,622,297.9	1,214,519.6	1,197,704.1

Related

Lifestyle indicators

	2012	2013	2014	2015	2016
Internet Users ('000)	89,420.3	94,839.3	107,903.6	113,942.6	119,586.8
New Registrations of Passenger Cars ('000)	3,115.2	3,040.8	2,794.7	2,331.8	0.0
Consumer Expenditure on Food (USD million)	211,428.3	211,613.1	209,029.6	155,561.1	152,467.3

Related

Market sizes

	2012	2013	2014	2015	2016
Tourism Receipts (USD million)	6,942.1	7,541.3	0.0	0.0	0.0

Related

(Euromonitor, 2016)

8. Royal Chundu reviews on Tripadvisor

" Beautiful River View "

The hotel is well away from the attractions of Livingstone, Victoria Falls so, but it is a quiet and relaxing place well, with very helpful staff. The rooms are well sized, and the view of the river is beautiful. At the end of the day hippos we came under the balcony of the rooms.

- **Stayed July 2014**

Cris P. from São Paulo, SP

" Place to relax and be pampered "

Excellent hotel for those seeking comfort and relaxation. Beautiful location, good structure, treating scored top marks. Ideal for those who enjoy nature. Subject to River Lodge and we had an upgrade to the Island Lodge. The staff concerned with the comfort and well-being of guests. The Sungani chef would talk to us to see how the food was. He makes a crème brûlée to take his hat. Great food. The manager Hessah passes the information calmly. Bungalows and separated, which provides great privacy, 2 showers, bathtub on the balcony where prepare a hot bubble bath. Before breakfast take something to the room at the time you asked to be awake, and is placed in a compartment for your privacy (do not even open the door to get coffee). The entire staff is very good. I cannot remember the name of everyone, but everyone, without exception, were very friendly and attentive.

Every afternoon leaves a boat trip on the Zambezi River, from where you can see the animals that are in the reserve across the river (since Zimbabwe).

After dinner, an employee with us with a flashlight up to our room, as there is little lighting in the path, just to keep the mood of nature.

the only drawback are insects, which are expected because it is a hotel on the waterfront. But it is precisely its location that is the biggest asset of the hotel. And very worthwhile. Sit in the room watching the river run is very relaxing. Would undoubtedly there.

Room Tip: **The room # 1 Island Lodge is closer to the common area.**

Stayed February 2014, travelled as a couple

Livia Cortat from Rio de Janeiro, RJ

" Luxury on the banks of the Zambezi river "

In addition to the tranquillity of the place, you are considered unique in this lodge! They care about all details! smiling face, luxury, for the most beautiful sunset I have ever saw in Africa! All bungalows separated with total privacy and facing the river: large apartments with balcony, shower with 2 showers, beds with curtains, telephone, closet. If you ask "wake up call" (awakening) this will be accompanied by a black coffee + cookies on a silver platter! Breakfast is served in the hotel's deck facing the river: delicious! The hotel offers various tours like sunset on the boat, kayaking alongside hippos, picnic on an island. Safari Chobe River is 10 minutes away! I loved this lodge! If your doubt is to stay near the Victoria falls I still would not trade this lodge! I have stayed at the hotel on the edge of victory falls!

Room Tip: **All bungalows are equal and with the same view of the river!**

Stayed November 2012, travelled with friends

Bia Bianco from Santana de Pernaíba, SP

9. Search Methods Used

A theoretical framework is paramount in a thesis, as "one of the main reasons for conducting it is to demonstrate that you are aware of and have examined the current state of the knowledge relating to the topic you have chosen for your research project." (Brotherton, *Researching Hospitality and Tourism*, 2008, p. 60). Another reason to have a theoretical framework clearly set is that "it helps us to design our research study" (Brotherton, *Researching Hospitality and Tourism*, 2008, p. 61).

Before discussing the research, itself, there are important theories that should be mentioned, hence the importance of a literature review. There are a number of advantages by having a literature review, once "writing a literature review is a powerful learning device"; and, besides, "the literature review is the first place in your own study where you can show your scholarly competence and your grasp of important issues in your field" and, finally, "the literature review serves as the basis of your own study." (Murray & Beglar, 2009, p. 158) To briefly introduce the search methods: the researcher will start with literature about the subject of study in order to have a proper literature review. Furthermore, the researcher will use different online databases and search engines. With this variety of research methods, the researcher Robbert van Hattem can build an objective review and an in-depth analysis.

The terms defined as research terms are the following: market research, marketing research definition, how to write a market research plan, the importance of a market research, luxury tourism, luxury destination, luxury tourism definition, tourism system and luxury market definition. Different search terms were combined with an "AND" or with quotation marks in order to get more specific results.

- Evaluating criteria:

To increase the reliability of the project, it is essential to base it on the recommended literature. Information retrieved from a webpage has been evaluated and analysed with the AAOCC criteria (Appendix 5), meaning that the accuracy of the data will be analysed and the authority of the source was checked. Other aspects analysed are whether there is objectivity on the data, whether the subject is applicable on the current situation and whether it covers the topic researched. By doing this, an increase on the validity of each source is expected.

- Search engines used:

sciencedirect.com.saxion.idm.oclc.org
scholar.google.com
google.com
literature (Brotherton / Baloglu)
Saxion Library

10. Structure of Advice to the ZTA

The researcher aims at advising the ZTA who are the most potential targets in the Brazilian luxury market and what could be improved in Zambia as a destination according to the gap between the supply and demand sides.

After the research section, a study will be made addressing what Zambia could offer and what are the desires of the Brazilian segment in order to draw a clear picture for the reader of the potential. Gaps are expected to appear between the supply and demand sides, being Zambia, as a tourist destination, in the supply side and the Brazilian luxury travel market in the demand side. Those gaps would be the opportunity for Zambia to improve. The researcher will find out what are the current Brazilian travel trends. According to these trends, the advisory part will scrutinize what could be further improved. Based on information about the trends of the market, it is also possible to decide whether it is, at the present moment, the right time to market Zambia in Brazil.

More in-depth information about how this is going to happen will be demonstrated at the research part of this proposal.

As stated before, the advice will be given aiming to help the ZTA to decide whether they want to put more budget into marketing Zambia as a luxury destination towards Brazil, and invest more money to improve the things they already have.

A rough estimated budget plan will be delineated in the advisory part of this report, in order for the ZTA to have a clearer picture of roughly how much the Bureau will need to spend.

11. Images and tables

Figure 1: What Luxury Means?

Figure 2: Dimensions of tourism

Figure 3: Market segmentation

Figure 4: Social class in Brazil

Figure 5: Characteristics of Brazilian luxury travellers

Figure 6: Brazilian luxury travellers needs and wants

Figure 7: LOCAL CURRENCY PER US\$1 , PERCENT CHANGE (JANUARY 2015)

Figure 8: Where to stay in Zambia

Figure 9: What to see in Zambia

Figure 10: What to do in Zambia

Figure 11: Match between supply and demand sides

Figure 12: Swot analysis

Figure 13: Segmentation for the traditional travellers from the Brazilian luxury market

Figure 14: Potential target group

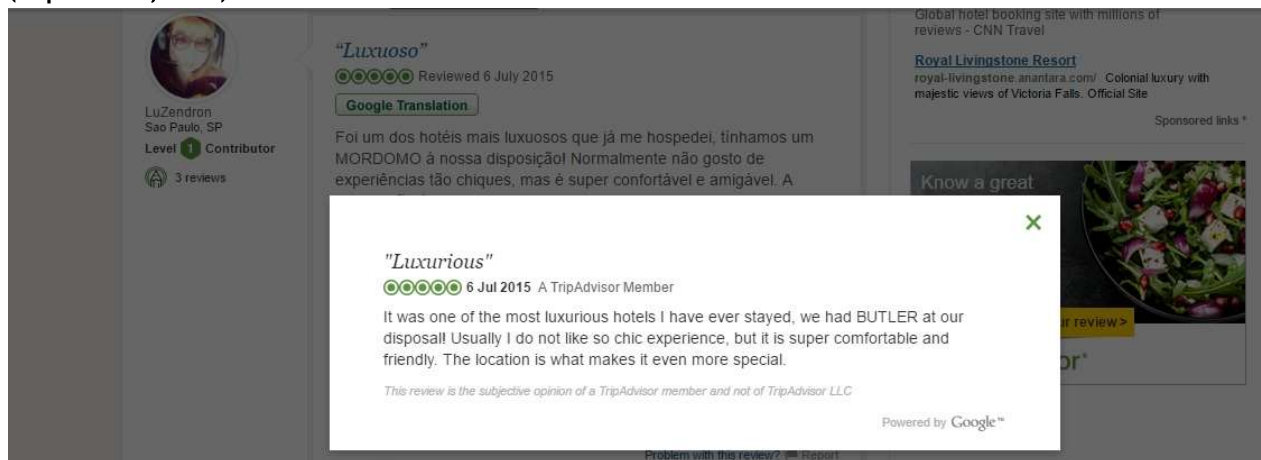
Figure 15: PDCA

Figure 16: Financial implications

12. Royal Livingstone reviews

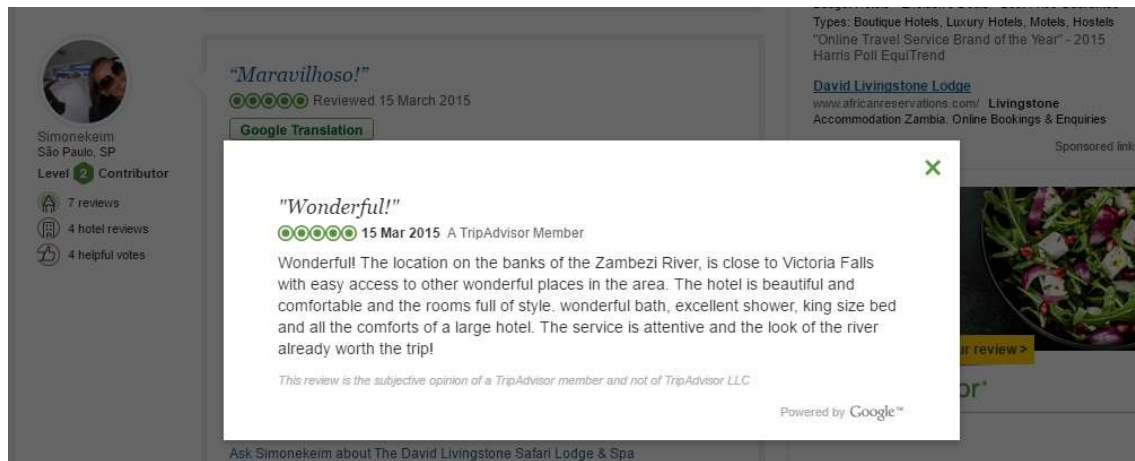


(Trip Advisor, 2016)



(Trip Advisor, 2016)

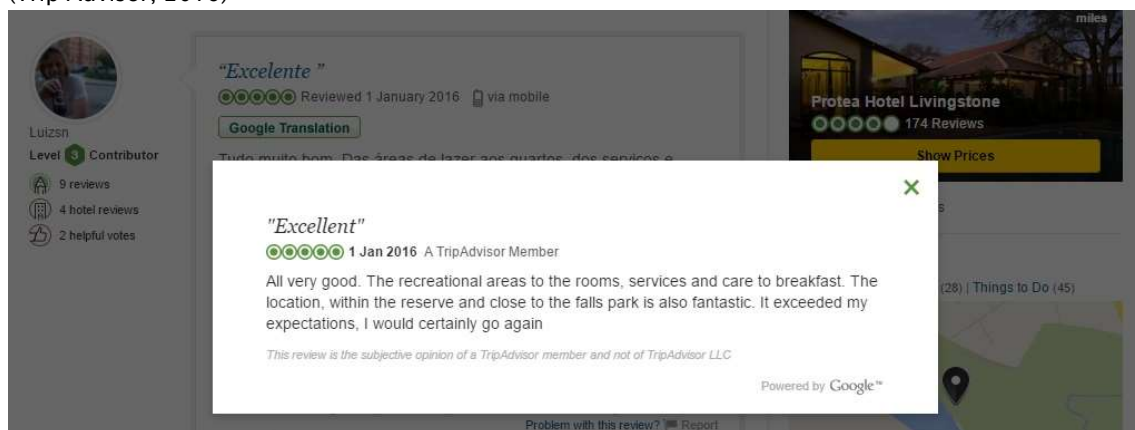
13. The David Livingstone Safari Lodge & Spa reviews



(Trip Advisor, 2016)

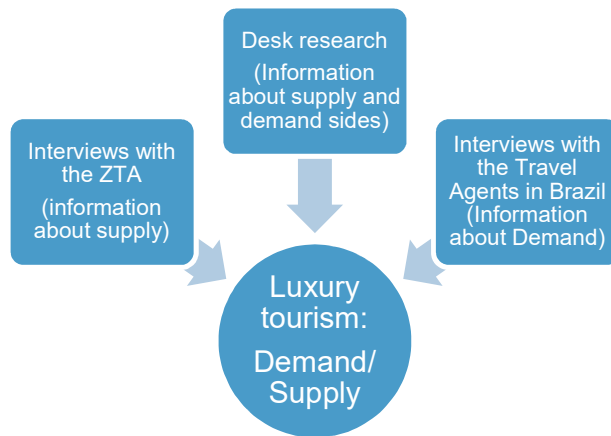


(Trip Advisor, 2016)



(Trip Advisor, 2016)

15. Research Methods used



❑ Desk Research

Firstly, for all the sub questions it is possible to find many answers by analysing previous researches. The definition of desk research is “Gathering and analysing information, already available in printed or published on the internet” (BusinessDictionary.com, 2015). The Australian Tourism Board, for example, has already a document with the outcome of a research about the Brazilian market profile. Some of the questions could be answered by using this kind of previous research. Another example, that was also mentioned on the theoretical framework, is the Consumer and Trade Research in Brazil, document made by the Canadian Tourism Commission (CTC). Desk research is the way to gain as much data as possible about the market segment. Answers for questions as what are the trends and developments from the market or which distribution system is used can be found with desk research. More specific questions that cannot be found on secondary data need to be answered on interview basis. The advantage of desk research is that the researcher is able to search information whenever he requires it and wherever he needs it. This will result in advanced time planning which can reduce the time pressure for the researcher. Furthermore, databases where the researcher will gather the precise information from are mainly previous researches made about the Brazilian market – or, more specifically, the Brazilian luxury market.

Regarding book references, the data is gathered from the suggested literature and other possible relevant source, like for example, other tourism marketing related books available in the Saxion Library. Desk research can also be used to gather information such as the income, age and physiological characteristics of the segmented group. The VISA beneficial policy for Brazilians can be collected through tour operators or tourism related websites as well as official governmental websites as, for example, the IBGE (*Instituto Brasileiro de Geografia e Estatísticas*). IBGE is the Brazilian research centre, “the main provider of data and information about the Country. Such information meets the demands of several types of segments of civil society, as well as the bodies at the federal, state and municipal level.” (IBGE, 2016).

The present research has a very specific topic – the Brazilian luxury market – about which not enough information can be found making use of desk research. To overcome this insufficiency, primary data will be needed.

❑ Interviews

Figure 10: Interviews

Brazilian market research	Respondents	8 – 10 Field experts (preferably travel agents)
	Methods	In-depth interview Face-to-face / Skype meetings
Zambia Product analysis	Respondents	Ms Kofi
	Methods	In-depth interview Skype meetings/ Emails

Interviews will be conducted in order to create primary data about the Brazilian luxury travellers and Zambia luxury products. These interviews are going to answer questions that cannot be answered using desk research. Therefore, a qualitative approach is needed and will be held with field experts; in other words, field experts are people that are familiar to or experts about the luxury tourism segment in Brazil whom know and understand the long-haul luxury travellers in Brazil. And in the supply side, Ms Kofi will be the main contact in order to give out information about the products that Zambia offers. The field experts, can give an overview about the market, answering questions that cannot be answered with desk research only. With a qualitative research, new options can appear and the research becomes richer in data. According to literature, "one of the advantages of interviewing when compared with other more structured and deterministic methods of data collection is sometimes seen to be the degree of flexibility that exist while the process of collecting the data is taking place" (Brotherton, Researching Hospitality and Tourism, 2008). These experts understand better about customers and what are their needs and wants. It is also a way to confirm the findings of the desk research. The experts chosen to answer the interview about the demand side, are professionals directly connected to the tourism industry in Brazil.

Personal interviews will be made, giving the researcher a full understanding of the Brazilian luxury segment. As mentioned before, the research with field experts will be an in-depth, qualitative research. In order to give some reliability to the research, at least 8 experts from the field in Brazil will be interviewed, due to time limitation, it will not be possible to interview more much more than 8 experts in Brazil. This will be done in a face-to-face method using open questions in order to get as much information as possible about the target group. During the interviews an interview guide was used. This can be found as appendix 6. In other words, the interview can be considered semi-structured. With a

qualitative research it is possible to get a more in-depth knowledge about the actual situation. Information about trends and developments or a more general information about the Brazilian luxury segment can be easily identified using qualitative research.

16. The increasing number of internet users in Brazil

Lifestyle indicators

	2012	2013	2014	2015	2016
Internet Users ('000)	90,935.7	96,554.4	110,025.9	116,371.0	122,329.0

17. Top three outbound Countries for Brazil

**BRIC's Top Three Outbound
Destinations 2012**



18. Research questions and sub-questions

Figure 7: Research questions

Central Research Question				
To what extent is there a match between the current Luxury tourism products in Zambia and the needs and wants from the Brazilian luxury travellers?				
	Sub-questions	Sub-sub questions	Process of collecting data	Outcome
1	What kind of luxury tourism products does Zambia already have?	<ul style="list-style-type: none"> • Accommodation • Attraction • Restaurants • Entertainment • Transportation • Local Inhabitants 	Desk research; Questions to the ZTA.	To find out which luxury tourism products the ZTA intends to sell.
2	What are the needs and wants of the Brazilian luxury segment?	<ul style="list-style-type: none"> • Accommodation • Attraction • Restaurants • Entertainment • Transportation • Local Inhabitants 	Desk research and Interviews with field experts in Brazil.	To identify key characteristics of that Brazilian luxury segment.
3	What are the trends and developments in the Brazilian travel market?	<ul style="list-style-type: none"> • General trends and developments within the Brazilian luxury market. 	Desk research; Interviews with field experts.	To get insight on trends and developments in the Brazilian luxury segment in order to spot opportunities for the ZTA
4	What are the main characteristics of the Brazilian luxury travel market?	<ul style="list-style-type: none"> • Geographic characteristics • Demographic characteristics • Psychographic characteristics 	Desk research; Interview with field experts.	To gain information about how to best segment the Brazilian luxury travel market

19. Data source and collection methods

Figure 8: Data source and collection method per sub question

Sub questions answered	Data source	Data collection method
1;2;3;4	Websites; literature; Reports; articles ...	Desk research
1;2	ZTA; Tour operators in Zambia	Interview
2;3;4	Brazilian experts in the tourism industry	Interview

21. Segmentation

Type of travellers	Characteristics
New travellers	Normally younger than 50 years old
	normally couples
	Spend more without thinking
	It is an emerging travellers
	Has limited cultural level
	Value more the material rather sensorial experiences
	Consume traditional Brands
	Goes to mainstream destinations (e.g.G7 destinations)
	In the market for less than 10 years
	"Instant consumers"
	Show off is more important than enjoying
	Brand is important
	They share experiences on social media
	Also called "passport stampers"
	Has money but lack in culture
	Products and facilities more important than experiences
	Visit mainstream destinations
Traditional travellers	Normally older than 50 years old
	Also travels with the family
	Good education background
	have been rich the whole life
	Gives more attention to quality
	Use first class flight
	Research about destination beforehand
	older than 60 seeks for comfort and stay longer in destination
	The ones who like to explore are mainly women
	there is a tendency for mainstream destinations

	Image of destination attracts this target
	Sometimes a particular product in the destination attracts
	They also like to show off
	they are a small percentage of the total
	tendency to repeat a destination
	They seek for something more than just a good hotel/service
Brazilians from the luxury travellers in general	Between 30 and 55 years old
	Normally around 50 years old
	Mostly couples
	Financially stable
	younger travellers goes with parents
	Mainly travellers are from the "new travellers"
	Mostly older people
	They travel mostly in groups
	More women than men
	Age between 45 and 80 years old
	Mainly couples
	Africa is considered a honeymoon destination
	Travelling with the family is a tendency
	They use a lot of internet
	They look for promotions and use miles programs
	Specific products like special resorts are booked with agents
	Hotels in Brazil are booked without travel agents
	They know Europe
	There is a trend for "forfeit" packages
	Demanding people
	Not price sensitive
	Research all options beforehand
	Glamour
	everything has to be included
	Use branded outfit
	Don't ask for discounts
	need to feel "special"
	attention for details
	Good service required
	differentiated product
	Exclusivity
	Unlikeness
	They are mainly coming from Sao Paulo

New travellers		
Demographic characteristics	Psychographic characteristics	

		Geographic characteristics
Normally younger than 50 years old Normally couples	Spend more impulsively Emerging travellers characteristics Limited cultural level more material then sensorial Consume traditional brands New in the market Show off characteristics Share trips on social media Tagged as "Passport stampers" Has money, lack in culture Facilities are more important than experience	Mainly from São Paulo
Traditional market		
Demographic characteristics	Psychographic characteristics	Geographic characteristics
Normally older than 50 years old Often travels with family Good education level Have always been wealthy Smaller percentage of the population	Attention for quality choose for first class fight Research about destination beforehand Tendency for mainstream destinations Image of destination is important Like to show off Tendency to repeat destination The ones above 60 years old seek for comfort Mainly women Younger ones are more adventures	Mainly from São Paulo

Needs and wants by segmented group:

Needs and Wants	Type of travellers	Characteristics
Service	New travellers	Exclusivity
		Differentiation
		Portuguese speaking reception
	Traditional travellers: comfort	Small groups
		Excursions
		Preferably with a Portuguese speaking tour guide
		Whole trip with tours arranged in Brazil already
Accommodations	New travellers	Tradition accommodations
		Traditional brands

		Stays in big cities
		More material, less sensorial
		Expensive is always better
		Show off
		Differentiation
		Exclusive feeling
	Traditional travellers: comfort	Comfortable hotel
		Good facilities in the hotel
		Good location
		International food in the hotel
		Good service
		No necessity for famous brand
		Good experience
	Traditional travellers: Explorers	Flexibility
		Multiple hotel options
		Tours with smaller groups
Attractions	New travellers	Mass attractions
		Visit only famous spots
		Only the "best" out of the destination
		Instant consumers
		Superficial attractions
		Mainstream activities
	Traditional travellers: comfort	Famous attractions
		Other attractions are a plus
		no extreme activities
	Traditional travellers: Explorers	Knows about attractions beforehand
		Interest different attractions (not usual)
		Unique experience
Restaurants	New travellers	International food is a must
	Luxurious travellers: Comfort	International food is a must
		Local food is interesting
		Food safety is really important (hygiene)
		Many don't dare to try local food
		Diversity of food is important
Entertainment	New travellers	Mass entertainment
		Trendy famous brands
		Something they can show-off
	Traditional travellers	Privacy
		Educational meaning
	Traditional travellers: comfort	Rest
		Light entertainment
		Diverse entertainment options

	Traditional travellers: Explorers	New experiences
Transportation	New travellers	Private transportation
		Business class flight
	Traditional travellers: comfort	Executive class flight
		Least stopovers as possible
		Access to VIP areas in airport
		Combine not more than two destinations in one trip
		Guided trip with reception at the airport
		Could use public transportation in short trips if there is guidance
		Least transportation as possible within the destination
	Traditional travellers: Explorers	Often rents car
		Make use of public transportation
		Travel within the destination
Interaction with locals	New travellers	Follows a program
		Not much interaction with locals
		Has language barriers
	Traditional travellers: comfort	Hospitality is really important
		They are used to the Brazilian hospitality
		They would appreciate a nice story about the locals
		Interaction with locals only during excursions
		Privacy from the traveller is important
		Not much interaction with locals
	Traditional travellers: Explorers	Interest about local population
		Interest in the culture
		They like to interact with the locals

22. Some examples of luxury accommodations in Zambia

Royal Livingstone (173 rooms):

It is a luxurious hotel located in the Mosi-Oa-Tunya National Park, with private access to the Victoria Falls. Some of the main characteristics are:

- Good location, with free and unlimited access to the Victoria Falls (Private access)
- Dinner experience with sunset
- Activities desk
- Internet access
- Free private parking
- Casino
- Massage with view to the Zambezi River

Analysing reviews on Trip Advisor it was noted reviews from Brazilians who stayed in this hotel this year. Their reviews are really positive and can be found on appendix 12. Moreover, the hotel has an average score of 8.6 on Booking.com.

David Livingstone Safari Lodge (77 rooms)

This is a luxurious lodge located 10 minutes driving from the Victoria Falls. Main characteristics includes:

- Ten minutes driving away from the Victoria falls
- Spa and wellness centre
- Private river-cruise
- Private bathroom
- Suites with hot tub and lounge area
- Private balcony
- Fine cuisine in relaxing setting
- Activities offered by the lodge includes game drives, bird watching and fishing.

There are many good reviews on Trip Advisor about the friendliness of the staff. There are inclusive good reviews from Brazilians who visited this accommodation, this can be seen as appendix 12. Moreover, the hotel has an average score of 8.8 on Booking.com.

Sussi and Chuma (14 rooms)

It is a Lodge and Spa accommodation, located inside of the Mosi-oa-Tunya National Park 12km away from the Victoria Falls. Main characteristics includes:

- View across the Zambezi River
- Luxury chalet accommodation
- Plunge pool
- Private Chef
- Special diet menus
- Spa centre and massage treatments
- Free airport shuttle

This property does not have parking place. Moreover, there are no reviews available on Trip Advisor.

Chinzombo Safari Tented Camp (6 villas)

Located at the South Luangwa National park, this bush camp is considered widely luxurious. Main characteristics are:

- 6 villas, one of which is designed for families
- Opens March 1st 2013
- Open all year
- Only 1 hour from Mfuwe Airport
- Private access by boat to the South Luangwa National Park
- Situated in 60 acres of private pristine Luangwa river frontage
- Wi-Fi in each villa
- Cooled sleeping areas
- Cutting edge green power and waste technology
- Only sustainably sourced or recycled and recyclable construction materials

There are really good reviews on Trip Advisor mentioning excellence on services and the quality of the safari.

Chichele Presidential Lodge (10 rooms)

Located in the South Luangwa National park, this Lodge has as main characteristics:

- Elegantly furnished
- Large French windows opening into private terrace
- Luxurious bathroom
- All meals included
- View to the valley

- Activities offered includes game drives and walking safaris
- Free airport transfer
- 2 hours' drive from Mfuwe airport

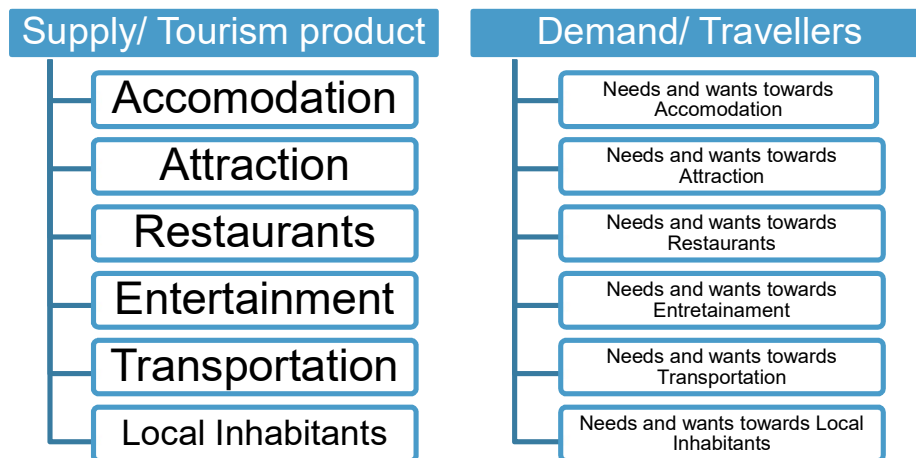
Royal Zambezi Lodge

Considered the best speciality lodge in Lower Zambezi National park by Trip Advisor, the Royal Zambezi Lodge has as main characteristics:

- African themed accommodation
- Outdoor pool and spa and wellness centre
- Private patio
- View to the river from the room
- Meeting facilities
- Attractions in the surroundings include boat cruises, walking safaris or game drives.

23. Components of the Tourism System

Figure 1: components of the tourism system



Source: Based on Kozak & Baloglu

24. Steps from the Product development

Activity	Purpose
Market research	Understand profile, characteristics, tasks and trends of markets and segments
Market: product matching	Identify products and services to be developed in line with market requirements
Tourism/product development areas	Identify areas within the overall destination appropriate for specific types of product development
Stakeholder consultation and collaboration	Ensure the opinions and aspirations of all relevant stakeholders – local, national, international – are canvassed and taken due account of in the Tourism Product Development plans prepared
Flagships/hubs	Identify outstanding features within one or more tourism/product development areas where major products can be developed to constitute 'hubs' to attract tourists
Clusters, circuits and events	Create the 'spokes' fed through the 'hubs' by bundling together a range of attractions and activities, creating tourism routes, and organising festivals and events
Product portfolio and investment plan	Formulate the various Tourism Product Development opportunities into a cohesive and integrated development plan, and prepare and disseminate a product investment portfolio for prospective investors
Human resource development	Create vocational training and managerial educational programmes that produce the level and calibre of personnel needed by the planned tourism product developments
Marketing and promotion	Feature the tourism product developments in the positioning of individual tourism development areas as part of the overall destination branding.

(UNWTO and ETC, 2011)

26. Tourism destination operationalisation

Concept	Dimension	Indicators	
Tourism destination (Luxury destination)	Accommodations	Luxury accommodations indicators	
	Attractions	Luxury attractions indicators	
	Restaurants	Luxury restaurants indicators	
	Entertainment	Luxury entertainment indicators	
	Transportation	Luxury transportation indicators	
	Local inhabitants	Indicators about interaction with locals	

27. Match per type of traveller

Needs and Wants	Type of travellers	Characteristics	Available products in Zambia	Match grade
Accommodations	New market	Tradition accommodations	<ul style="list-style-type: none"> - Lodges - Hotels - Guest house 	6
		Traditional brands		
		Stays in big cities		
		More material, less sensorial		
		Expensive is always better		
		Show off		
		Differentiation		
		Exclusive feeling		
	Traditional market: comfort	Comfortable hotel		9
		Good facilities in the hotel		
		Good location		
		International food in the hotel		
		Good service		
		No necessity for famous brand		
		Good experience		
	Traditional market: Explorers	Flexibility		8
		Multiple hotel options		
		Tours with smaller groups		
Attractions	New market	Mass attractions	- National parks	8
		Visit only famous spots	- Water falls	
		Only the "best" out of the destination	- Lakes	
		Instant consumers	- Cities and towns	

		Superficial attractions	– Historic (monuments, museums)	
		Mainstream activities	– The Victoria Falls	
	Traditional market: comfort	Famous attractions	– The Kafue	9
		Other attractions are a plus	– Certain National parks	
		no extreme activities		
	Traditional market: Explorers	Knows about attractions beforehand		9
		Interest different attractions (not usual)		
		Unique experience		
Restaurants	New market	International food is a must	A la carte and buffet	8
	Traditional market: Comfort	International food is a must	International and local cuisine with easy access	8
		Local food is interesting	Meals served in the luxury accommodations	
		Food safety is really important (hygiene)	International cuisine in renowned restaurants with transfer service from the accommodation.	
		Many don't dare to try local food	The more options the better.	
		Diversity of food is important	Pay good attention to food hygiene.	
Entertainment	New market	Mass entertainment	– Adventure activities	8
		Trendy famous brands	– Safaris and Tours	
		Something they can show-off	– Cultural activities	
		Privacy	– Safaris and tours	–

	Traditional market	Educational meaning	– Wellness tourism	
	Traditional market: comfort	Rest	Younger people from this target would like adventure tourism	7
		Light entertainment	With the varieties of activities that available in Zambia, the traditional group and emerging group can both find their interests.	
	Traditional market: Explorers	Diverse entertainment options		10
		New experiences		
Transportation	New market	Private transportation	– Daily international flights	5
		Business class flight	– Car rental	
	Traditional market: comfort	Executive class flight	– Public transportation (Bus, train)	5
		Least stopovers as possible	The road situation is bad in general due to the natural aspect.	
		Access to VIP areas in airport		
		Combine not more than two destinations in one trip		
		Guided trip with reception at the airport		
		Could use public transportation in short trips if there is guidance		
		Least transportation as possible within the destination		

Interaction with locals	Traditional market: Explorers	Often rents car		9
		Make use of public transportation		
		Travel within the destination		
	New market	Follows a program	<ul style="list-style-type: none"> – Friendly people – English speaking – Multi cultural 	10
		Not much interaction with locals		
		Has language barriers		
	Traditional market: comfort	Hospitality is really important	Hospitality	9
		They are used to the Brazilian hospitality		
		They would appreciate a nice story about the locals		
		Interaction with locals only during excursions		
		Privacy from the traveller is important		
		Not much interaction with locals		
	Traditional market: Explorers	Interest about local population		10
		Interest in the culture		
		They like to interact with the locals		

Type of traveller	Average grade
New	6.4
Comfort	7.8
Explorer	9.2

28. Costs in Brazil

Ticket price

Lusaka (LUN) ► São Paulo (GRU)
1 volwassene | Economy

08-09-16 30-09-16

Toon de hele maand Er kunnen extra bagagekosten in rekening worden gebracht

Stel prijsalarmen

258 resultaten Sorteren op Prijs per volwassene

Tussenstops

Directe
Geen

1 tussenstop € 1.046

2+ tussenstops € 953

Vertrektijden

16:05 LUN 29u 30 16:35 (+1) GRU
2 tussenstops JNB, AUH
Gedeeltelijk uitgevoerd door South African Airways, Jet Airways

22:05 GRU 44u 23:05 (+2) LUN
2 tussenstops AUH, NBO
Gedeeltelijk uitgevoerd door Jet Airways, Kenya Airways

9 aanbiedingen vanaf € 953
Ga naar site

Details

Hotel price

Destination/hotel name:
Guarulhos

Work Leisure

Check-in date
Thursday 8 September 2016

Check-out date
Thursday 29 September 2016

21-night stay

Rooms 1
Adults 2
Children 0

Search

Reorder by: Our top picks first Lowest price first Stars Distance from city centre Guest review score

Your results include some shared accommodations, such as dormitory beds. [Show private rooms only](#)

Sables Hotel Guarulhos ★★★★★
Guarulhos
1 person is looking at this moment
Booked 5 times today

Good 7.7
330 reviews

Price for 21 nights
€ 971
Breakfast included
FREE cancellation - no prepayment needed

In high demand!

Choose your room

Selling out fast in Guarulhos: 1 hotel like Sables Hotel Guarulhos is already sold out!

29. Summarising:

Figure 6: Brazilian luxury travellers needs and wants

Services needs and wants	<ul style="list-style-type: none"> Exclusivity Uniqueness Superior feeling Comfort Package
Accommodation needs and wants	<ul style="list-style-type: none"> Good location Comfortable environment Package features from hotel Good reputation Exclusivity
Attractions needs and wants	<ul style="list-style-type: none"> Popular attraction Easy to access Good reputation

	<ul style="list-style-type: none"> • Privileged access • Mainstream attraction
Restaurants needs and wants	<ul style="list-style-type: none"> • International food range • Hygiene/Cleanness • Easy to access • Great layout/ display
Entertainment needs and wants	<ul style="list-style-type: none"> • Educational • Easy to access • Good reputation • Shopping experience • Innovative/ new for them
Transportation needs and wants	<ul style="list-style-type: none"> • First-class • Comfort • Exclusivity • Arranged route
Local Inhabitants	<ul style="list-style-type: none"> • Hospitality • Interaction but with boundaries

Source: Interviews and desk research

30. Summarising:

Figure 5: Characteristics of Brazilian luxury travellers

Demographic characteristics	Mainly couples; Traditional traveller has higher education and cultural level and they also have good occupations; Brazilians rarely travels alone, sometimes in groups, mainly in couples or with the family; "A" class has household income above U\$\$ 44,000.00, they are more than 2 million families in Brazil (about 3,8% of the population); age can vary, being traditional travellers mainly older than 50 years old and the new "A" class emerging group can be composed also by younger people.
Psychographic characteristics	Traditional travellers have a higher cultural level and travel more; The emerging population has a lower cultural level and often visits a destination mainly because of its image; Brazilians are mainly interested in known brands; They like sharing experiences on social media; even traditional travellers often do not speak English.
Geographic characteristics	São Paulo is the biggest emissary market from Brazil (the state of São Paulo in general); other strong regions are South East, South, and there is some wealth concentrated in Fortaleza.

Source: Interviews and desk research