

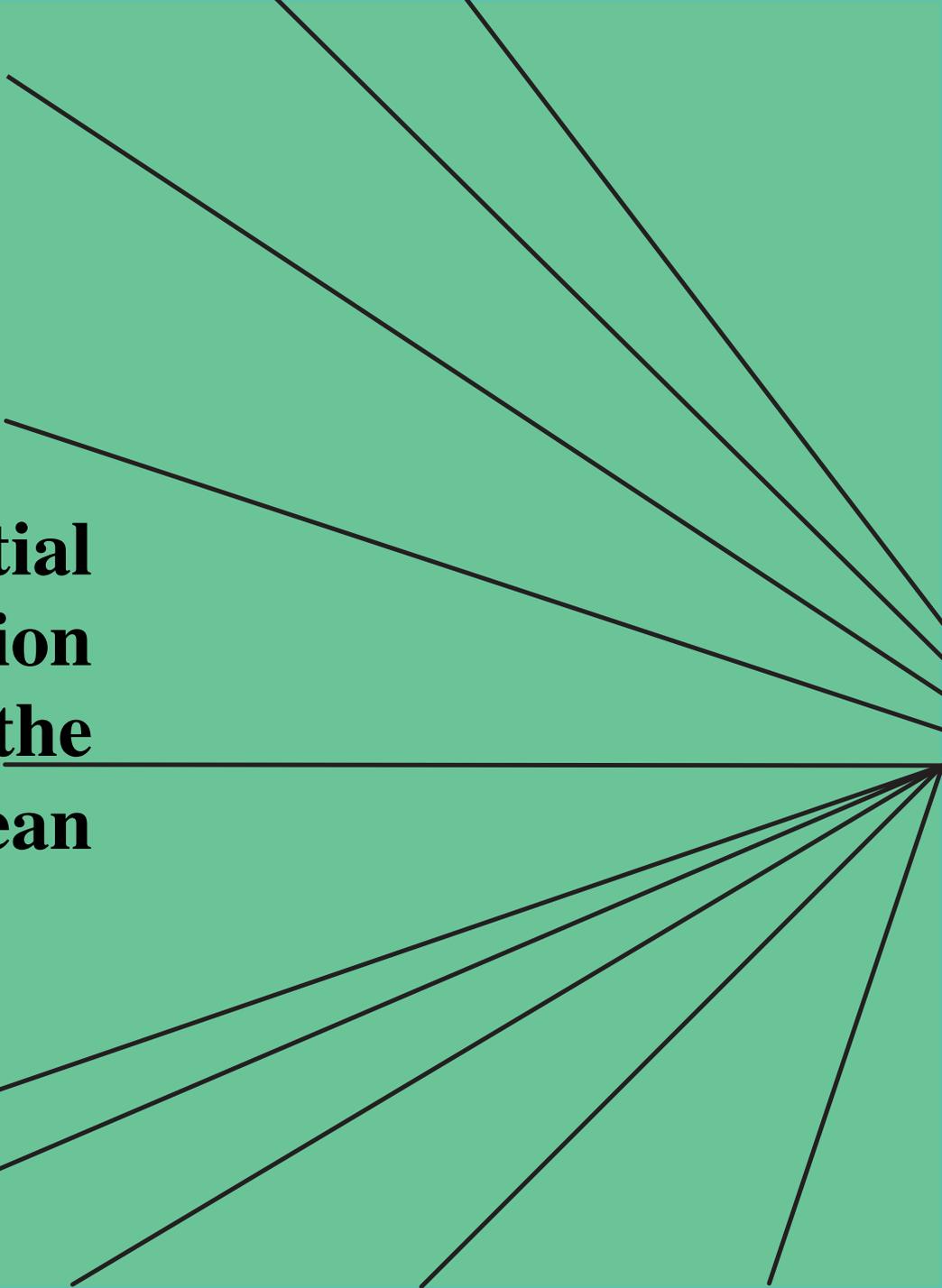
THE CARIBBEAN PROJECT

QUALITATIVE STUDY RESULTS

SAO PAULO, SEPTEMBER 26TH. 2013

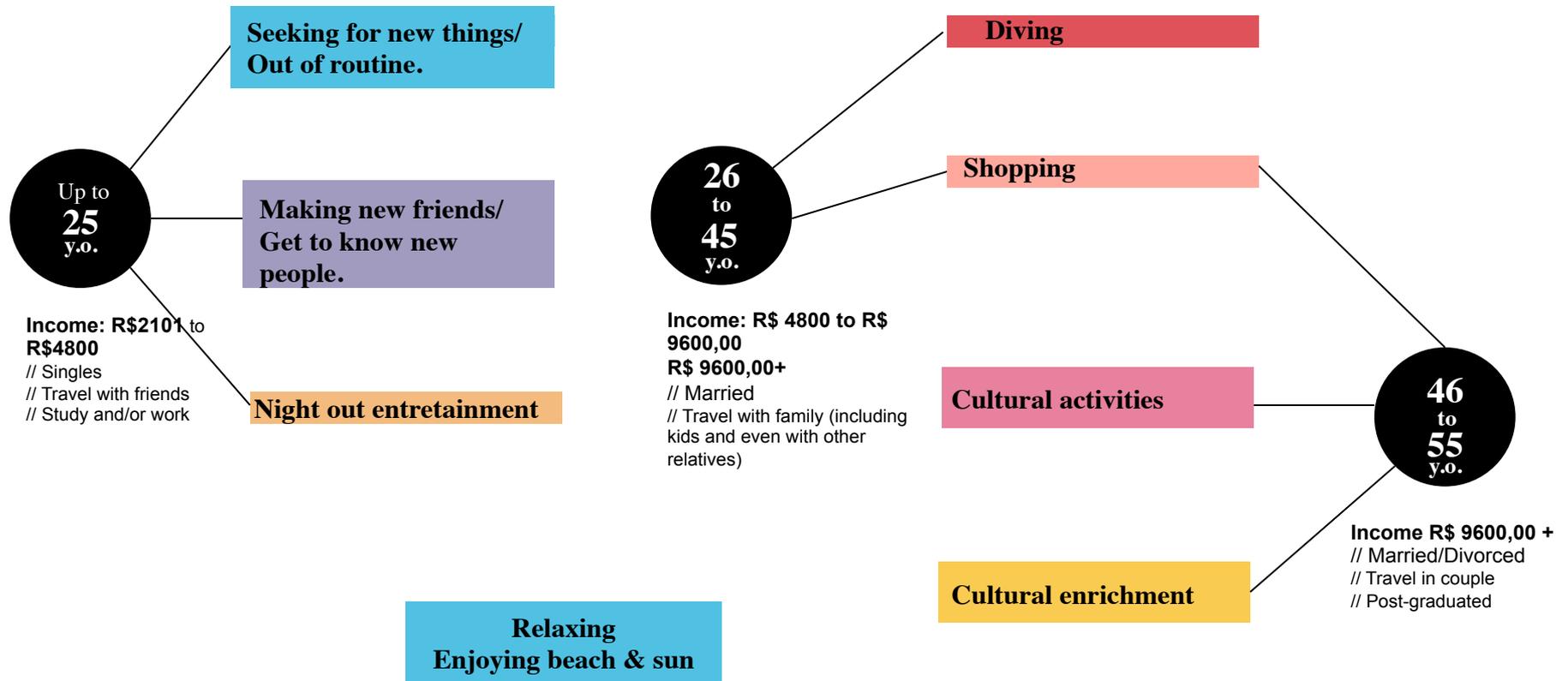


1. Towards a potential demand segmentation model for the Caribbean

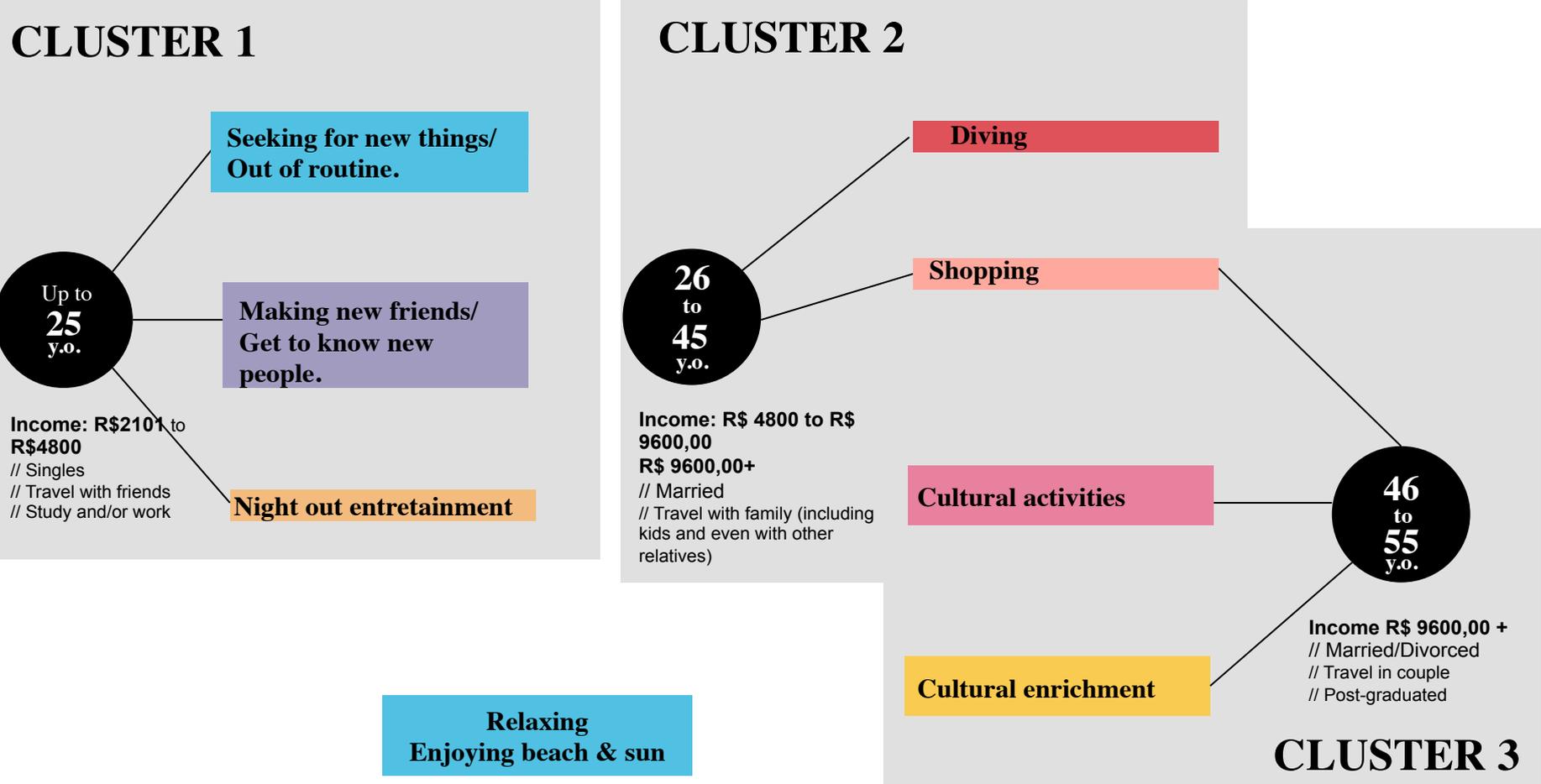


Towards a segmentation of Potential Customers for the Caribbean project

What we learnt from the quantitative study that motivations are the key segmentation criteria for both actual & potential visitors to Caribbean



We enter into Quantitative research to better understand the needs, expectation and desires of the potential clusters for the Caribbean



Qualitative Research Design

	Young Connectors	Happy Families	Experienced Travellers
	18/25 A/B Class Students without children	30/40 A/B Class All with children	45+ A Class All travelled abroad at least twice over the past 3 years
Current Traveller: travelled over the past 12 months to the Caribbean (Cancun, Punta Cana, all islands, etc....)	1 FG 50% men 50% women	1 FG 50% men 50% women	1 FG 50% men 50% women
Potential Traveller: plan to travel abroad and are considering the Caribbean as an alternative.	1 FG 50% men 50% women	1 FG 50% men 50% women	1 FG 50% men 50% women

All groups were conducted in Sao Paulo

Motivations - Conclusions

There is a wide range of motivations that impact on the choice of the Caribbean destination:

- **Relaxing / Enjoy beach & sun:** is a default still a differential Caribbean property vs. other destinations (ie. USA & Europe).
- **Shopping** is a complement that become a must among families & experienced travellers, but is never a reason in itself.
- **Making new friend/Get to know new people:** is a key drivers for the young target choice and is secondary for the others.
- **Seeking for new things/ Out of routine.**
might be explore differently depending on the target: it means adventure (youngers), entertainment (families) and unique/genuine experiences to enrich life (experience travellers).
- **Cultural enrichment/Cultural activities:** becomes relevant for the Caribbean in 3 possible perspectives: music (youngers) natural sights (families) and local gastronomy (experience travellers).
- **Diving:** is a narrow motivation. The Caribbean offers in Brazilian potential demand perception a full horizon of opportunities in “reconnecting with nature”, undersea discoveries, social imaginary of surf as well as other “natural sports” such as hiking and birth watching.

TO BE SUCESSFUL IN PROMOTING BRAZIL TOURISM TO THE CARIBBEAN IT IS ABSOLUTELY KEY TO SEGMENTATE THE DEMAND ACCORDING TO MOTIVATIONS

3 CLUSTERS ARE TARGET FOR THE CORICOM TOURISM PROMOTION IN BRAZIL

Cluster 1

Young Connectors



Men and women aged 18 -25, single, most of them are students or newly graduated, from A/B class. With their own little income (prevenient from internships or first jobs) together with the family's support.

They usually travel with friends.

They want to enjoy the vacations, have fun, meet new people; they prefer destination that are able to enhance the nightlife and the experience exchange.

Cluster 2

Happy families



Men and women aged 30-40, married, who usually travel as family with children and sometimes also with other relatives or friends.

They are highly educated, from A/B class, with own income that varies from BRL 4,801 to BRL 9,600 & BRL 9,600+.

They seek rest, shopping, leisure, entertainment for the whole family, comfort and service. The resorts or all-inclusive packages are the favorite ones.

Cluster 3

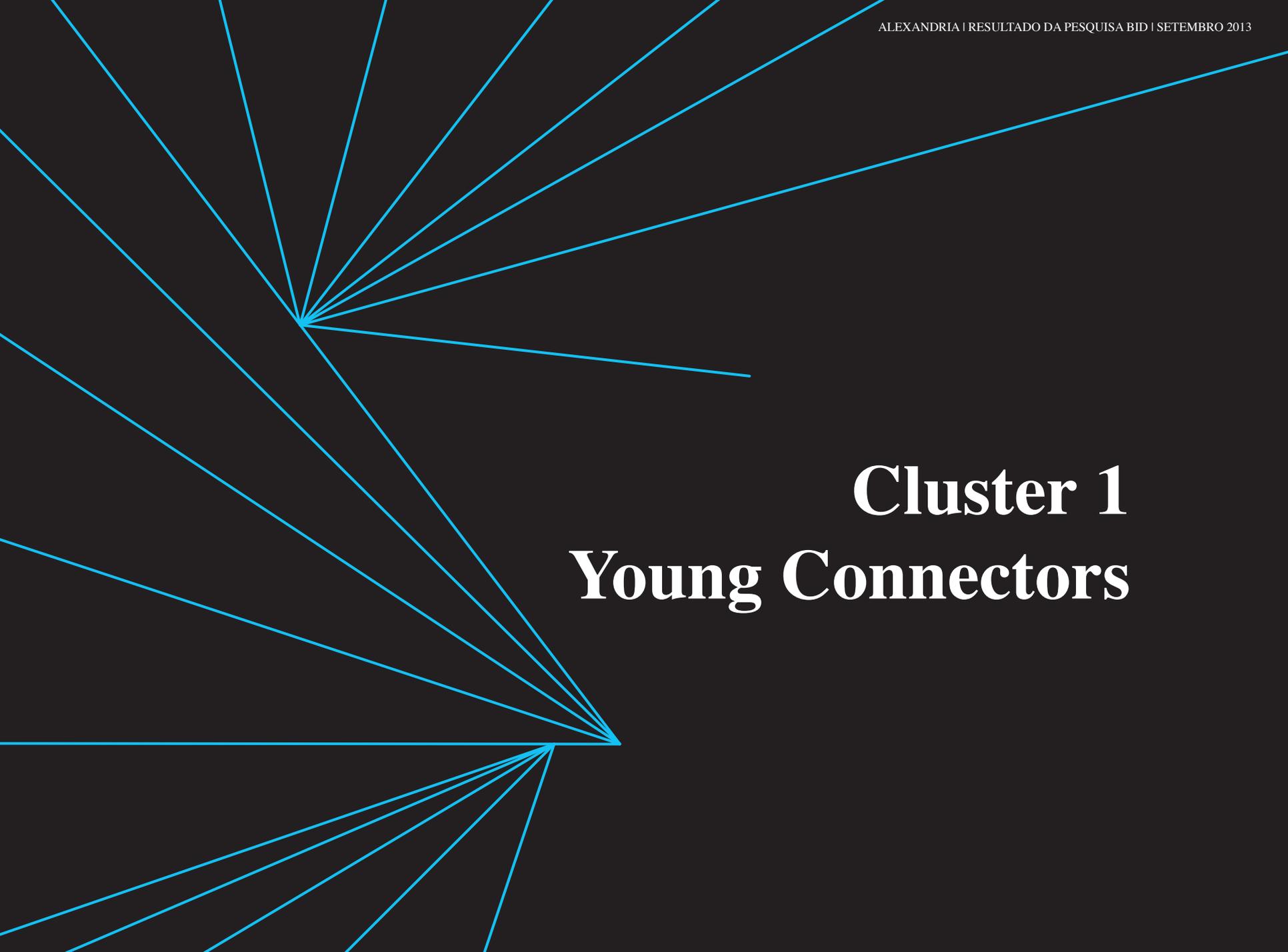
Experienced Travellers



Men and woman aged 45+, married or divorced with older children, who usually travel alone or with a companion.

They are highly educated, with income of BRL 9,600+.

They already travelled a lot, have passports filled with stamps, are passionate about travelling and look for exploring different activities able to bring unique and enlightening experiences.



Cluster 1 Young Connectors



Young Connectors

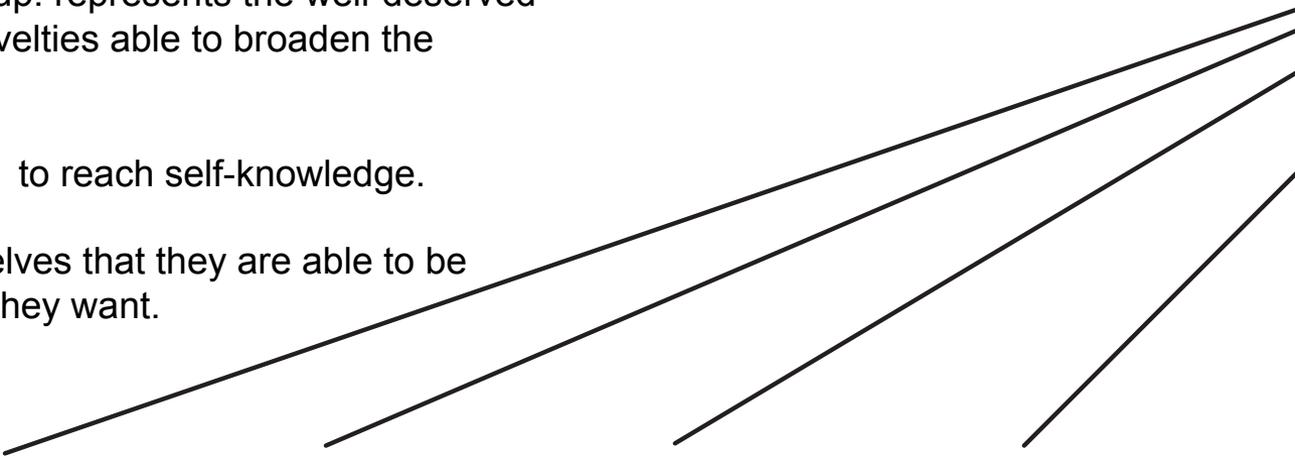
LIFE STAGE:

They are **young** and feel they have the right to have fun. During the year, they need to follow a busy agenda that involves attending a graduation course and often also working.

Most still live with their parents and dream of becoming independent in three aspects:

- Financial: having their own money to support themselves
- Physical: owning a home
- Emotional : being responsible and knowing to look after themselves, and having relationships outside the family unit.

THE MEANING OF TRAVELLING

- The travel, in particular the graduation one, has a ritual meaning in the life of this group: represents the well-deserved independence. They seek novelties able to broaden the universe of knowledge.
 - They test their limits as a tool to reach self-knowledge.
 - They want to prove to themselves that they are able to be organized and achieve what they want.
- 

Young Connectors



Influencing factors:

1. They use digital media to get information and plan the trips.
2. In case of graduation trips, the convenience and security offered by travel agencies prevail.
3. Ticket prices: they choose the cheaper ones, therefore flight with stops are not a problem for them. They usually pay in full (they save before buying the ticket).
4. Accommodation prices: they choose simple and inexpensive hotels; and give up comfort.
5. Most of the budget is spent in the nightlife: bars, clubs, opportunity to drink as much as they want

Destinations considered for the next trip

3 types of destinations are in the mind of this group when they need to make a decision:

1. Local destinations with beaches and lively spirit

// Morro de São Paulo, Bahia

// São Paulo State Coast

// Beaches in the Northeast region

2. Internation destinations to be visited with the parents

// Europe (Barcelona, Venice)

// United States (Miami, New York)

// Buenos Aires

3. The Caribbean

// Cancun

// Punta Cana

Young Connectors



What do they think of the Caribbean?

Most don't know much about the Caribbean apart from **CANCUN, PUNTA CANA** and partially ARUBA and CURAÇAO.

Among those who have been there:

A) CANCUN: travelled to celebrate the graduation or with organized groups.

They highlight the diverse, cosmopolitan, lively and affordable nightlife.

Admiration for the infrastructure dedicated to the night entertainment, being specially charmed by the:

- themed nights
- diversity of music, styles and shows
- creativity and abundance in the drinks
- exciting gatherings with other young people from all over the world.

B) PUNTA CANA is a quieter destination, ideal to travel with friends or boyfriend/girlfriend. Most had travelled in smaller groups. The success comes from the combination of amazing beach, with affordable prices, comprehensive hotel and night infrastructure that fit all budgets, and young and free vibe.

Young Connectors

What do they know about the Caribbean?



To this target, none of the four countries (Jamaica, Bahamas, Barbados and Trinidad Tobago) is Top of Mind.

When asked, two countries are listed as more interesting, with a clearer imagery:

JAMAICA:

To the young, Jamaica has a strong identity not associated with the common places in the Caribbean.

It stands out in a positive way for the Reggae music, Bob Marley, Rastafarian lifestyle, young, relaxed, free and friendly vibe.

But has also negative associations with marijuana, social inequality and partially the violence.

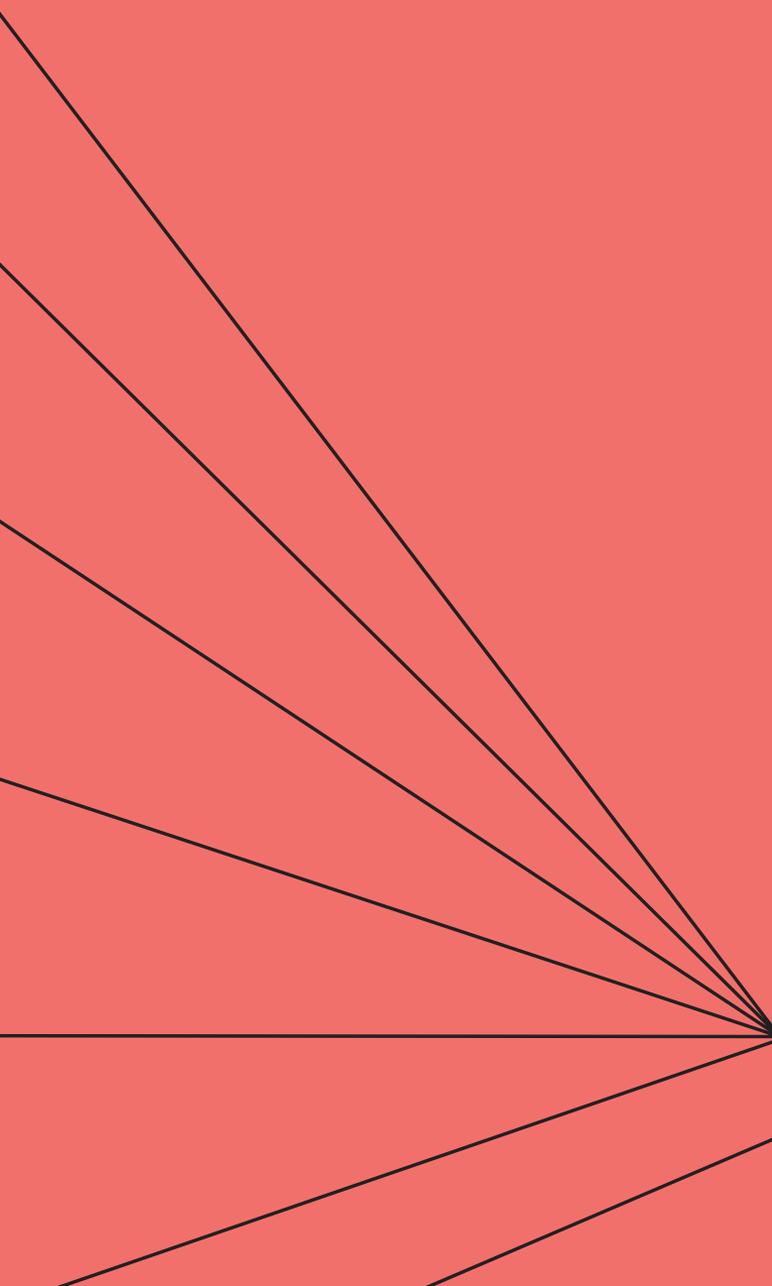
BAHAMAS

It is quickly recognized as the Caribbean postcard.

The destination raises several concerns related to its costs, since the whole imagery refers to sophistication and luxury, from which they feel excluded both material and ideologically.

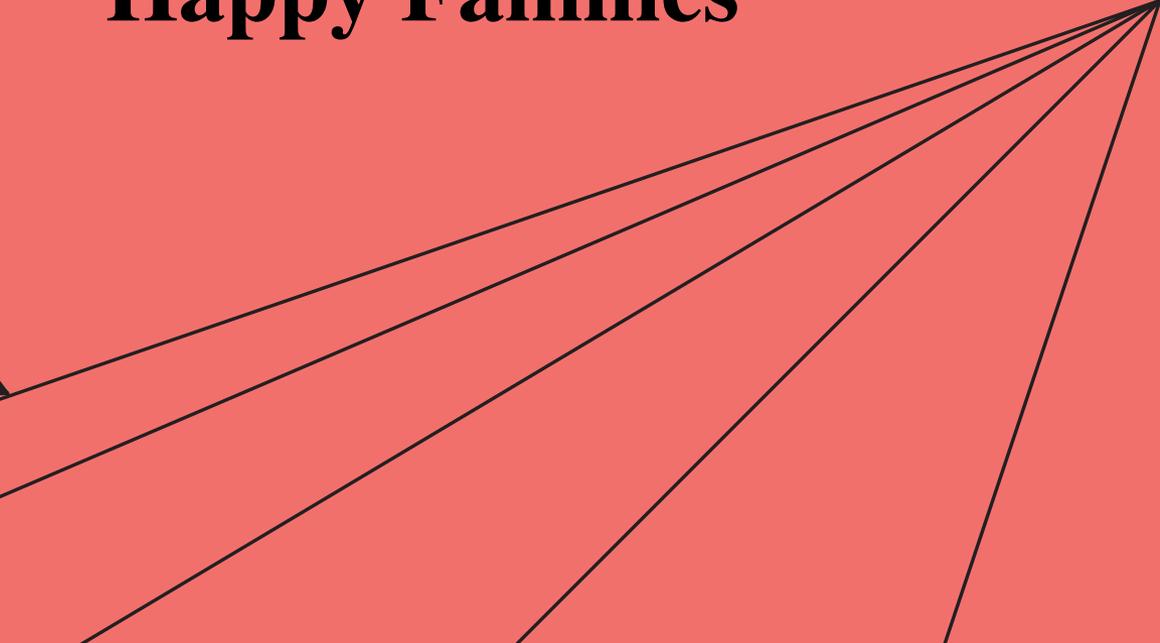
BARBADOS and TRINIDAD TOBAGO

They are completely unknown and therefore lack of content to inspire the target.

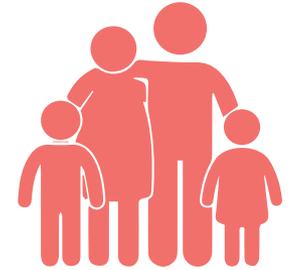


Cluster 2

Happy Families



Happy Families



LIFE STAGE:

- Families with adults aged 30-40 and children aged 0-12.
- They are in a stage of building a family and a career, and feel that they accomplished a lot in life and there is still more to come.
- They have a household income of BRL 9,600+ that allows them to travel abroad as family.
- They like to enjoy quality time with the family, follow the children's growth and even make sacrifices for them.

THE MEANING OF TRAVELLING

- They feel that vacations are an annual ritual needed to reinforce the family affective bonds. That's why they choose the destination with consensus. In fact, the destination has to be attractive to all, no exceptions.
- Travelling abroad means offering fun and distinctive opportunities for the family that will become part of the collective memory.
- Some destinations are also a way of fulfilling wishes from the past (visiting the Disneyworld, shopping in New York)



Happy Families

Influencing factors:

1. They plan well in advance and use the miles accumulated during the year on business trips.
2. They usually pay in installments.
3. They get information on the internet because it is more convenient and offers more alternatives and prices (they base on the experiences reported by other travellers – reviews)
4. They prefer to buy in Travel Agencies because they feel more secure (they can't go wrong with the whole family) even knowing that they could get better prices on the internet.
5. **They choose based on convenience: the watchword is ALL INCLUSIVE. Packages with integral solutions guarantee not having bad surprises or big issues in the destination (in terms of quality and costs). All inclusive is the guarantee of expenses control.**
6. **Service and infrastructure to look after and entertain the children is a key influencing factor.** This type of support (nannies, entertainers, organized play activities) are fundamental to ensure the adults' rest. The Portuguese idiom is a “must have” in this case.
7. Flights with stops are not a problem as long as the connections don't take too long.
8. Distance and time are also not a problem as long as the destination is attractive to all.



Happy Families

The destinations considered for the next trip

The Caribbean competes, in this case, mainly with:

1. Miami/Orlando

This is a destination desired by most of the interviewees. Those who have never been, plan to go; and those who have been, want to go again.

The combination Disney // Shopping is a successful combo.

2. Beaches in Brazil

// São Paulo State Coast

// Beaches in the Northeast region

Those are the well-known and comfortable vacations (but currently expensive)

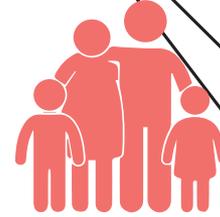
3. Culture/Shopping Destinations

// New York

// Buenos Aires

Happy Families

What do they think of the Caribbean?



Like the Young Connectors, the Happy Families also know very little about the Caribbean.

Only **CANCUN** and **PUNTA CANA** were mentioned spontaneously and partially CUBA and BAHAMAS.

The geographic location of the Caribbean Islands established a direct comparison with Miami and Orlando as if they were part of the same unit.

Those who know the Caribbean have been in PUNTA CANA with the family on vacations or CANCUN with friends/boyfriend/girlfriends before having kids.

Associations:

- Admiration for the hotel infrastructure, the variety and quantity of resorts and crystal water beaches that don't offer risk to the kids.
- Great awareness due to the offers of tourism operators, ads on newspapers and on the net.

Happy Families

What do they know about the Caribbean?



None of the countries is mentioned spontaneously by this target.
Only Bahamas is recognized and creates affinity with the target's motivations.

BAHAMAS

When the elements below are suggested, they raise interest and have high potential to convert the information into preference:

// Water Parks

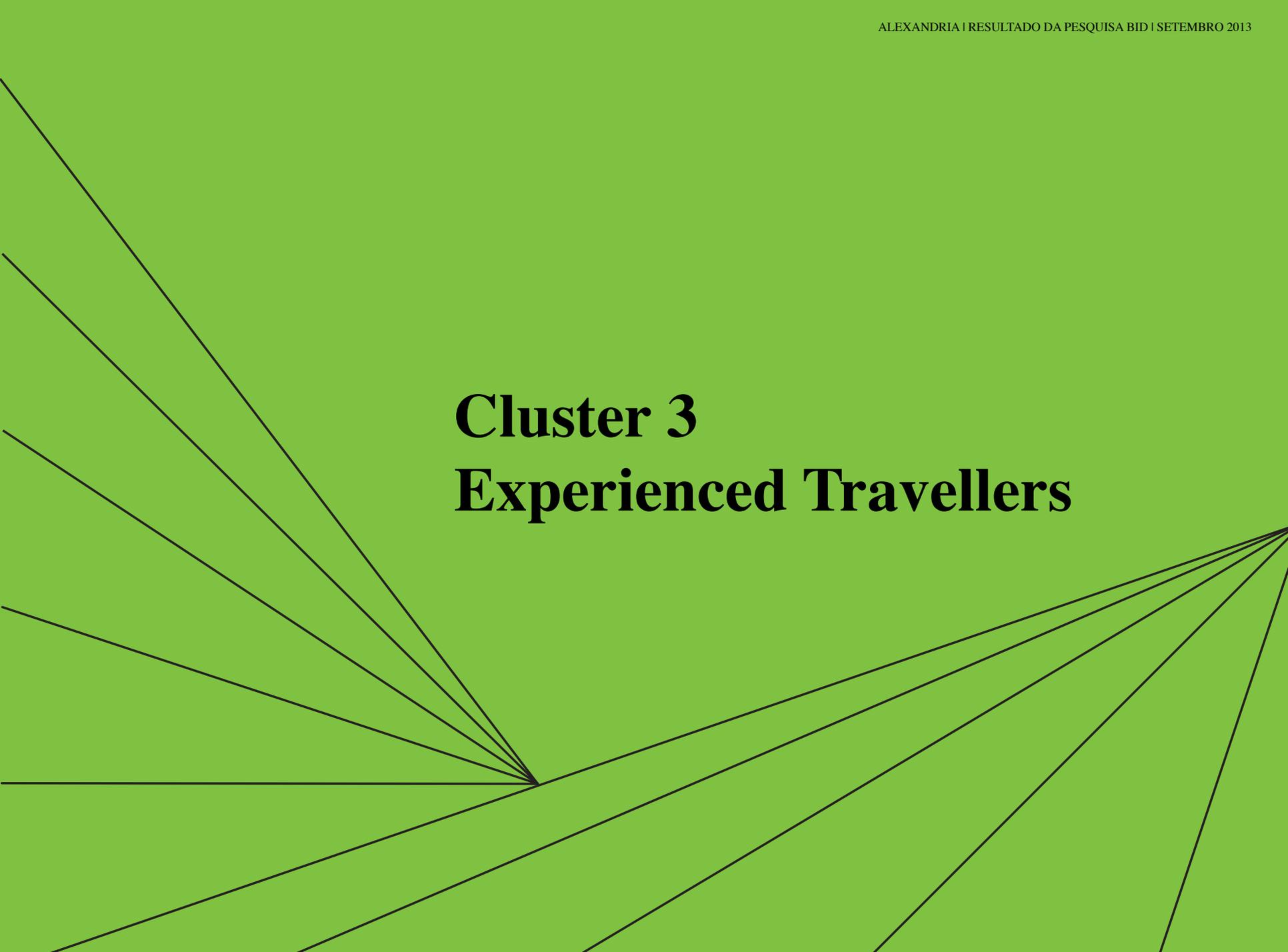
// Diving with stingrays, sharks and dolphins

// Possibility to shop international brands "duty free"

// All-inclusive infrastructure and resorts

// Varied and organized activities for children

// Service in Portuguese



Cluster 3

Experienced Travellers

Experienced Travellers



LIFE STAGE:

- Men and women aged 45+, married or divorced with children aged 12+.
- They are highly educated.
- They already travelled a lot, have passports filled with stamps, are passionate about travelling and look for exploring different activities able to bring unique and enlightening experiences.
- They managed to reach stability and balance in all aspects of their lives, but they still work. They are currently experiencing a hedonist phase, they want to enjoy life, rediscover pleasures and spoil themselves.

THE MEANING OF TRAVELLING

- They collect experiences: they are careful when deciding what type of emotions they will keep in their memories. They don't collect postcards but the feelings evoked by local dishes, a night in a fishing village and the discovery of a waterfall.
- They are totally against the massified tourism and run away from crowd places and fake spots created for tourists ("*... I find menus with photos of food disgusting ...*")



Experienced Travellers

Influencing factors:

1. They prefer direct flights, avoid stops when possible; and waiting too long between flights is unthinkable.
2. They prefer exclusive accommodations with little treats such as SPA, gastronomic restaurants, well located (never ALL INCLUSIVE)
3. They use the miles accumulated throughout the year, when possible. When it is not, they use the miles to acquire other benefits, such as car rental, hotel or upgrades.
4. They buy everything with credit card and only the ticket is paid in installments (but not too many)
5. They get information through mouth-to-mouth and recommendations from friends. They buy and read trade magazines. Their planning is based on digital media. The credit cards, the airlines and bank cards send information and offer services of tourism and travel.
6. They only book the flight and the accommodation. All the rest is acquired in the destination.



Experienced Travellers

The destinations considered for the next trip

The Caribbean competes with destinations outside the Caribbean

1. Africa

- Natural reserves and Safaris
- South Africa / Tanzania / Kenya

2. Destinations in Latin America

- Machu Picchu – Peru (gastronomy)
- Atacama Desert – Chile (biking)
- Mendoza – Argentina (wine)

Cultural/gastronomic destinations with unusual experiences

3. Timeless classics

// Italy (Toscana/Rome/Venice)

// Paris/New York

// Buenos Aires

Places they have already been, love and always want to go back.



Experienced Travellers

What do they think of the Caribbean?

This target has more information about the Caribbean than the other ones. Besides Cancun and Punta Cana they also mention Cuba, Bahamas, Aruba, Curacao, St. Maarten, etc.

Most who have already been there would like to go back and visit other islands and realities.

Associations:

- Deep rest and great comfort: they picture distinct hotels, private beaches, luxury and world-class service.
- Varied cultural activities: gourmand experiences, city tours, museums and understanding of the local culture and history.
- Contact with the nature.
- Upscale sea activities: deep sea fishing, boating, diving and snorkeling.



Experienced Travellers

What do they know about the Caribbean?

All have perceptions on Jamaica and Bahamas.
Barbados and Trinidad e Tobago, exactly for not being obvious and being unknown, intrigue and end up raising the curiosity of this target

BARBADOS E TRINIDAD and TOBAGO

They get interested in the
// Untouched and preserved natural nature
// Unusual experiences both in terms of contact with the nature and local history/culture
// Autochthonous gastronomy
// Distinguished or genuine hotel infrastructure
// Cultural attractions, architecture.

BAHAMAS

attracts them because of the
// Upscale infrastructure
// Variety of gourmand offers
// Sea activities
// Possibility of shopping

JAMAICA

attracts them because due
//nostalgic matter: would like to live an adventure that they were supposed to have lived when they were younger.
// pure nature and combinations of sea and land activities.

Profiles x Destinations with greater adherence

Tourist Profile	Destinations with greater affinity/ adherence	What amazed, charmed them	Barriers, concerns
Young Connectors	JAMAICA	<ul style="list-style-type: none"> // Cosmopolitan city // Varied nightlife attractions // Distinguished geography // Alternatives in terms of extreme sports // Crystal clear waterfalls // Meeting endangered animals // Destination of the curious traveler, hungry for new experiences // Night attractions: eclectic, international music // Cheerful and friendly service 	<ul style="list-style-type: none"> // Marijuana // Quiet and isolated destination // Social inequality, poverty and violence
Happy Families	BAHAMAS	<ul style="list-style-type: none"> // Water parks // Diving with stingrays, sharks and dolphins // Sea sports for all ages // Possibility to shop international brands "duty free" // All-inclusive infrastructure and resorts // Varied and organized activities for children // Service in Portuguese 	<ul style="list-style-type: none"> // Ostentation // Wealth, opulence
Experienced Travellers	BARBADOS TRINIDAD & TOBAGO BAHAMAS	<ul style="list-style-type: none"> // Untouched and preserved natural beauty // Unusual experiences both in terms of contact with the nature and local history/culture // Autochthonous gastronomy // Distinguished or genuine hotel infrastructure // Cultural attractions, architecture. 	<ul style="list-style-type: none"> // Too many people // Cultural or nature degradation // Artificial, fake, "touristic" // Safety (partially for Jamaica)