

A Work Project, presented as part of the requirements for the Award of a Master's degree in
Management from the Nova School of Business and Economics.

How to upscale the luxury hospitality sector in Tunisia in order to attract more wealthy
luxury guests ?

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Abstract :

This Work Project aims at investigating on how Tunisia can evolve towards Luxury Tourism, moving from Low-Cost Tourism that is currently dominant. The low-cost type of tourism tends to be harmful to the country's environment and affects its economic evolution. Tunisia has a great potential to be a part of this journey thanks to its ancient culture, location, and nature. To offer solutions, we developed a case study research investigating countries that have been in the same situation as Tunisia and succeed to enter the luxury tourism sector, combined with a primary research to understand people's attitudes toward Tunisia.

Key words: Place marketing, Tunisia, Luxury Tourism

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1- Introduction

Tunisia is one of the most attractive destinations for tourists around the globe. With more than 8 million visitors per year, Tunisia is ranked as the 4th among the other African countries in terms of number of tourists.

During the last years, Tunisia has experienced various downfalls and crises which have directly affected the tourism sector. The most important issue is that Tunisia has been mainly dependent on mass and low-cost tourists, who bring lower economic benefits than wealthier tourists. Wealthier tourists spend more and therefore contribute more to the country's revenue.

In this Work Project, we explore how Tunisia can transform its current situation by moving towards luxury tourism, which is able to bring more economic profit to the country. The challenge is how to upscale the luxury hospitality sector to attract customers with higher income and willing to spend more in vacation in countries like Tunisia.

Tunisia is trying to get rid of the mass tourism which was a main source of income for the country, but this gain hides great sacrifices and impacts the environment. A total change is required.

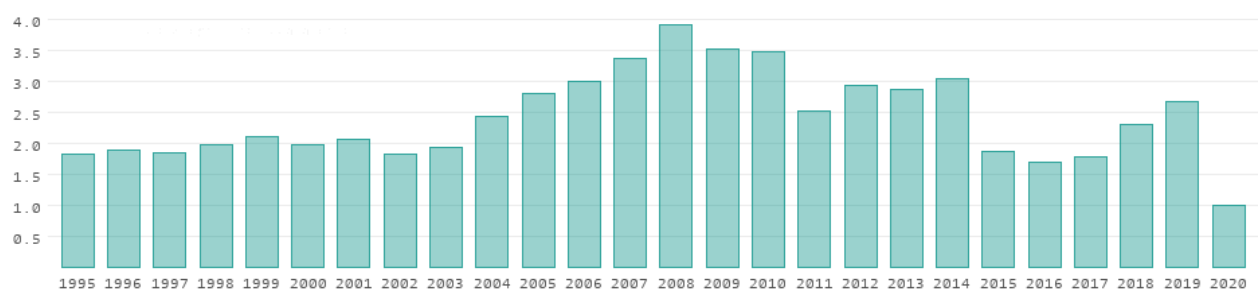
A shift towards a more luxurious and more sustainable type of tourism is one of the country's goals to ensure greater economic and ecological gain.

Tunisia is still at the beginning of the road. Other countries have already passed this test towards more luxury tourism and we will use them as case studies in order to make recommendations on what should be taken into account to address the WP objective.

2- Contextual Background

Tourism plays a major role in the country's economy. In 2019, the tourism revenues reached 2.68\$B which represents approximately 14% of the Tunisian GDP and offered occupations and jobs to 13% of the working population. (WorldDATA.info 2022)

Figure 1 : Tourism Revenue in Tunisia



Source : (WorldData 2020)

2.1- Tunisian Tourism Characterization

In Tunisia , the average amount of money spent by a tourist is between 300 to 400\$ per stay which makes Tunisia a country mainly visited by persons looking for low cost vacations, even comparing to other African countries such as Morocco that is offering a similar experience to their visitors . Figures 2 and 3 demonstrate that visitors of Morocco spend much more during their stay than the ones visiting Tunisia (WorldData.info 2022).

Figure 2 : **Revenue per tourist and per stay in Tunisia**

Year	Number of tourists	Receipts per tourist
2020	2.01 m	500 \$
2019	9.43 m	285 \$
2018	8.30 m	280 \$
2017	7.05 m	253 \$
2016	5.72 m	298 \$
2015	5.36 m	349 \$
2014	7.16 m	425 \$
2013	7.35 m	389 \$

Source : (WorldData 2020)

Receipts per tourist: tourism receipts are the expenses on goods and services made by visitors who travel to a destination country for tourism purposes.

Figure 3 : **Revenue per tourist and per stay in Morocco**

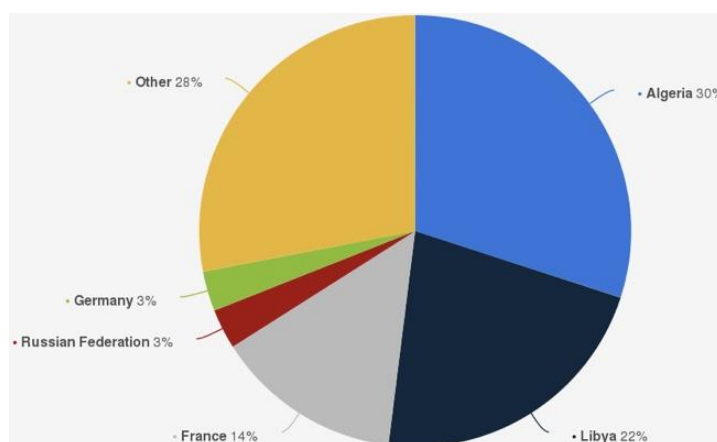
Year	Number of tourists	Receipts per tourist
2020	2.80 m	1,611 \$
2019	13.11 m	759 \$
2018	12.49 m	762 \$
2017	11.54 m	787 \$

2016	10.68 m	742 \$
2015	10.54 m	737 \$
2014	10.51 m	863 \$
2013	10.35 m	792 \$

Source : (WorldData 2020)

In 2021, Tunisia was able to welcome tourists from around the globe, but there are nationalities who are more likely to land on Tunisian soil and this can be explained by the location of the country, the prices offered and even competition. It is not surprising that the two neighboring countries, Libya and Algeria, are the two countries which now dominate in terms of the number of visitors. Then, French and Germans represent 17% of the number of visitors. Recently Tunisia opened its doors to a new Russian clientele and after 3 years, they have already reached 3% of the number of visitors in 2021 (Statista 2022). This trend might be stopped by the war in Ukraine.

Figure 4: Distribution of inbound tourist arrivals in Tunisia in 2021, by country of origin (Statista)



2.2. Recent changes

Recently, the country started promoting more luxurious vacations in fancy resorts with exclusive services for wealthy people.

The Tunisian government is offering many financial advantages to foreign and local investors to develop and launch new premium projects in the hospitality sector. During the last years, many giants of the sector opened more luxurious hotels, offering a new type of tourism and targeting wealthy customers. Among them, new brands came to the Tunisian market, such as

Marriott .

During the last 2 years, 10 new 5 stars hotels were built in different regions of the country aiming to offer exclusive services to their visitors (Dahl 2022).

The effort of the government is not just limited to financial aid. The country has lived very hard episodes in terms of security. Starting from 2016, the government applied new laws and developed a specialized police in Touristic regions in order to maintain the security and let foreign visitors enjoy their holidays peacefully. This action helped the country to earn the trust of the other nations and to be seen again as a safe touristic country (Law 2016).

3- Addressing the Work Project Topic

3.1. Methodology

We combined two sources of analysis: a case study research, based on secondary data and a primary research aiming at understanding potential tourists' perceptions of Tunisia as a destination for vacation.

Case Study Research:

The best way for us to collect accurate insights in real life is to analyze countries that have had the same journey as Tunisia, i.e., countries that have initially benefited from low-cost tourism but have decided to completely change their strategy and develop luxury tourism. We therefore developed case study research, studying 2 countries who undertook similar transformation. The choice of the countries was based on two main variables:

- Contribution of tourism on the Economy
- Similarities in terms of strategic transformation, i.e., countries that have benefited from low-cost tourism for a long time, but have been able to switch toward a more luxurious type of tourism.

We selected Spain and Portugal ==> Figure 5, 6, and 7 confirm the similarity of Spain and Portugal with Tunisia in terms of the contribution of Tourism to the GDP and contribution to employment.

Figure 5 : Contribution of tourism to the Tunisian economy - Year 2019

	Value	Percentage
Contribution to GDP (millions of euros)	1600	16.9

Contribution to total employment (millions of jobs)	0.3	11
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Source : (Statista 2021) & (Saidani 2019)

Figure 6 : Contribution of tourism to the Spanish economy - Year 2019

	Value	Percentage%
Contribution to GDP (millions of euros)	154,737	14.6
Contribution to total employment (millions of jobs)	2.72	12.9

Source: (Satellite 2019)

Figure 7 : Contribution of tourism to the Portuguese economy - Year 2019

	Value	Percentage
Contribution to GDP (millions of euros)	37600	17.1
Contribution to total employment (millions of jobs)	1.095	22.7

Source : (Knoema 2019)& (WTTC 2022)

Figure 8 illustrates the increase in receipts per tourist in Portugal, demonstrating how Portugal was able to increase tourist spending on its territory by hosting wealthier tourists.

Figure 8: Receipts per tourist Portugal

Year	Receipts per tourist
2007	1907\$
2006	930\$
2005	852\$

Source : (WorldData 2020)

Primary Research:

In order to investigate the various consumers' perspectives on tourism in Tunisia, we

developed an online primary research. This study aimed to determine whether potential wealthy visitors are familiar with Tunisia and their expectations (Please check the Questionnaire in Appendix 1).

We selected informants that meet the following criteria:

- Spend more than 1000\$ / person for a 7 days vacation
- Search for vacation based on culture and nature/beach

We obtained 26 responses. Sample characterization is presented below (Figures 9, 10 and 11):

Figure 9 : Travelling rate per year

Figure 10 :Traveler's budget for a week trip

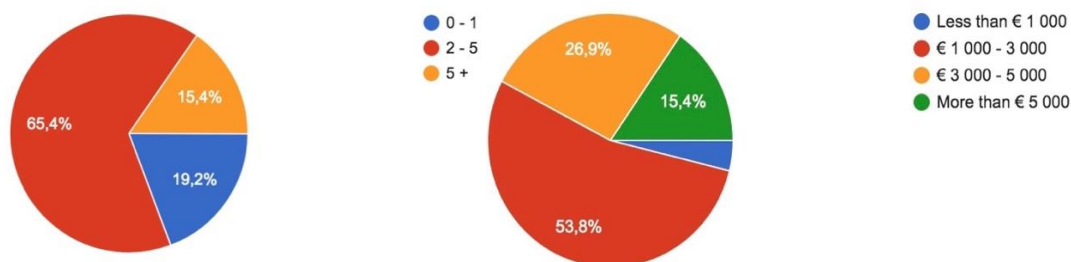
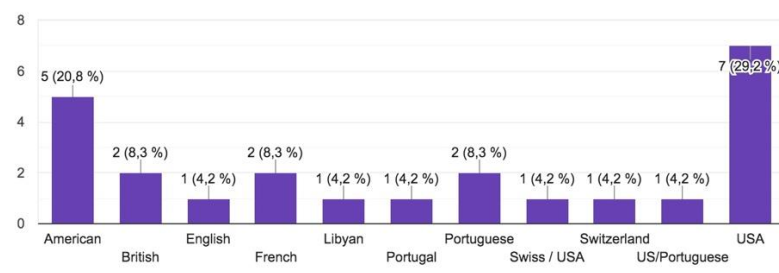


Figure 11 : Respondent Nationalities



3.2. Case Analysis

Based on the research that we have conducted, 3 main drivers contributed to the Spanish and Portuguese tourism transformation: **the governmental intervention** and how the government has been able to support tourism and develop it; **the infrastructure changes** because in order to have such a type of tourist, a suitable infrastructure should be prepared for

them and finally **the type of tourists that have been targeted**, i.e., capacity to attract a more wealthy target, drawn by luxury hospitality.

3.2.1. Spain

The governmental intervention

Skilled Labor

In 2021, the Spanish government invested 720M euro in different areas related to tourism . Since the government was concerned with the level of efficacy of the country's labor force, around 17% of the amount approved (124.4M - Figure 12) was used for hospitality and tourism schools in order to offer the best training for workers. The government did not only focus on unemployed people but also on people who already had a job in the tourism sector. The reason behind such action was to maintain the same level of competitiveness and convey to foreign visitors that Spain keeps its standards high (Moncloa 2021).

Figure 12: 124.4M invested into training for employed and unemployed workers in the Tourism Sector

	Aid Package
Training programs	67M
Training actions detected by the company	17M
Training for unemployed workers	36M
Scholarships	6M

Source : (Moncloa 2021)

The Spanish Governmental department of Tourism

Starting in 2018, the Ministry of Tourism became an independent ministry; previously, it was controlled by the Ministry of Energy, Tourism, and Digital Agenda. This change was made to raise the tourism sector to a higher level, as demand for Spain increased (OECD 2022).

The infrastructure changes

Airports

Madrid Airport is one of the busiest airports in Spain. To accommodate the volume of travelers and provide a pleasant airport experience in terms of waiting times, services, and security, the airport hired 500 new employees. Overall, more than 1,700 people work at Spain's busiest airport to manage the flow of international tourists (Reuters 2022).

Due to the influx of tourists, Spain has also accelerated the opening of Murcia International Airport. The airport, which King Felipe VI inaugurated in January 2019, can accommodate 3 million passengers and 23,000 movements per year (RMU 2022). Furthermore, the airport intends to expand to accommodate 5 million passengers.

Marinas

In July 2022, the new Megayacht dock, IGY Malaga Marina, was opened by the Port of Malaga. In order to establish Malaga as a luxurious and premium resort, Ocean Capital Partners and IGY Marinas have committed over €10 millions in the construction of a port with the ability to accommodate 31 yachts up to 180 meters in length (Nutter 2022).

New targeted tourists

Chinese Market

In terms of tourism, the Chinese market is one of the most important and lucrative. Chinese are known for their high taste and willingness to spend large sums of money during their vacations when compared to other nationalities. According to the China Tourism Academy, 150 million Chinese tourists traveled abroad in 2018, an increase of 14.7% vs. 2017. Before the Covid crisis, the number of Chinese people traveling abroad was expected to exceed 400 million by 2030 (Leung 2019).

Figure 13: Amount spent by Chinese tourists abroad

Year	(in Billions \$)
2019	255
2018	277.3
2017	257.7

Source : (Statista 2022)

Madrid airport is working with the Chinese consultancy company **Henkuai** in order to provide the best service possible to Chinese visitors. The objective is not just to offer translation but also to offer an exclusive service such as :

- Accepting WeChat Pay in Madrid Airport, an application used only by Chinese for payment.
- Recruiting Chinese staff who are able to speak Chinese fluently in different parts of the airport like the duty free, information desk.
- Implement Chinese meals in VIP lounges exclusively for them and offer the same menu onboard airplanes going or coming from china.

3.2.2. Portugal

The governmental intervention

Digitalization of the tourism sector

Portugal initiated a new strategy in 2011, precisely when the Troika arrived. Tourism in Portugal was heavily criticized, particularly because 13% of the country's hotels still used antiquated practices and were not fully digitalized.

Vila Gale is the best example of the Portuguese digitalization revolution in the tourism sector. The hotel chain is fully digitalized, from customer communication, booking, and information requests, to internal company digitalization. Processes are completely paperless and simple, benefiting the environment and increasing efficiency (Konicaminolta 2019).

Business environment

Making Portugal a business-friendly nation and luring international investors has been one of the biggest objectives the government has addressed in recent years. Portugal started by introducing the "golden visa" program, which allowed those who invested at least **€250,000** in the nation to enter Portugal and the Schengen region visa-free and become citizens by the fifth year (GlobalCitizenSolution 2022). Additionally, offering a **25%** lower tax rate for foreigners wishing to live in Portugal (Taxsummaries 2019)

As a result, Portugal was ranked the **17th** most business-friendly nation in Europe and the **28th** easiest place in the world to establish a business in 2018, thanks to its quick procedures. For example, registering a property just takes one day and starting a business takes on average 6 days (Turismodeportugal 2018).

The Infrastructure changes

Airports

2016 was a standout year for the Faro International Airport, with an increase in tourist registrations of 18.7%, or 7.6 million passengers. Particularly, Faro experienced the second-highest growth rate after Lisbon. The company's decision to launch an extension operation began with the changes of the navigational system of the airport (Vinci-Airports 2019).

Figure 14: Faro Airport Extension

Changes	Before	After
Terminal Ability (people/hour)	2400	3000
Terminal size (m2)	81200	93120

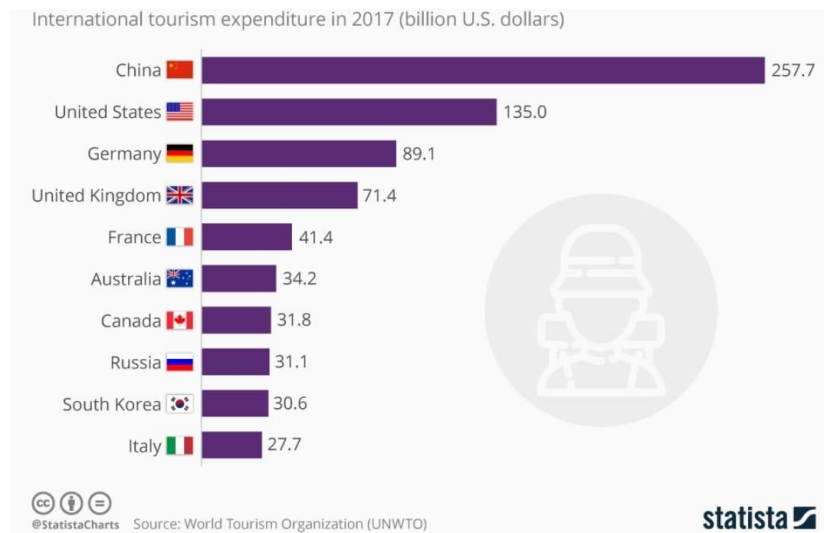
Source : (Vinci-Airports 2022)

By 2028, Vinci Airports and the Portuguese government will have invested more than 1.5 billion euros, the majority of which to be used to expand Lisbon International Airport and build a new airport. 650 millions are dedicated to the expansion of Lisbon's airport, which serves as the primary entry point for tourists looking to explore Portugal. In addition, 500 million will be set aside for the construction of a new airport (Newsroom 2019).

New targeted tourists

Portugal is committed to target American Tourists, who represented the second nationality worldwide in terms of expenditure in 2017. The American Tourists came just after the Chinese in term of spending abroad with over 135 billions spent.

Figure 15: American International Tourism spending in 2017



An example of the actions developed to attract the American Market: Cristiano Ronaldo X Madame Tussauds New York X “Visit Portugal”

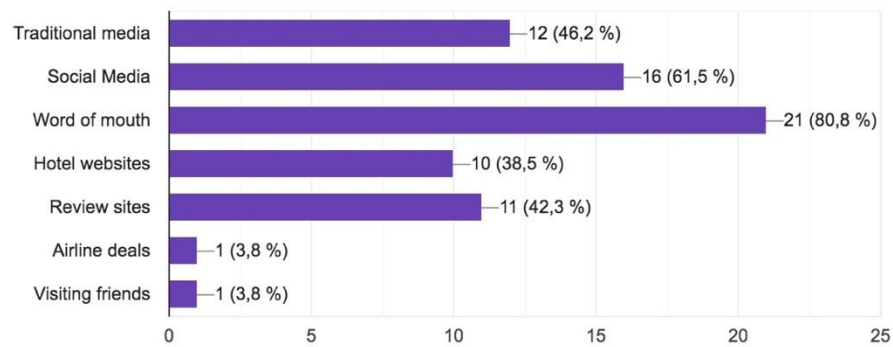
New York, 19 November 2022 , 1 day before the start of the biggest sporting event in history, The world Cup, which will gather over 2 billion spectators. The Portuguese football legend and team captain, Cristiano Ronaldo, will have his new wax figure unveiled by Madame Tussauds in Times Square in the heart of New York City (Eurosport 2022). Cristiano has always been a member of the organization "Visit Portugal," which promotes tourism in Portugal around the world. Undoubtedly, the purpose of this partnership with the New York museum is to persuade American tourists to visit the icon's natal country.

3.3. Insights from the Primary research

1st insight:

Most of the respondents rely on traditional media (12), social media (16), and word of mouth (10) to search for information on destinations or to help them make travel plans.

Figure 16 : What influence travelers decision-making

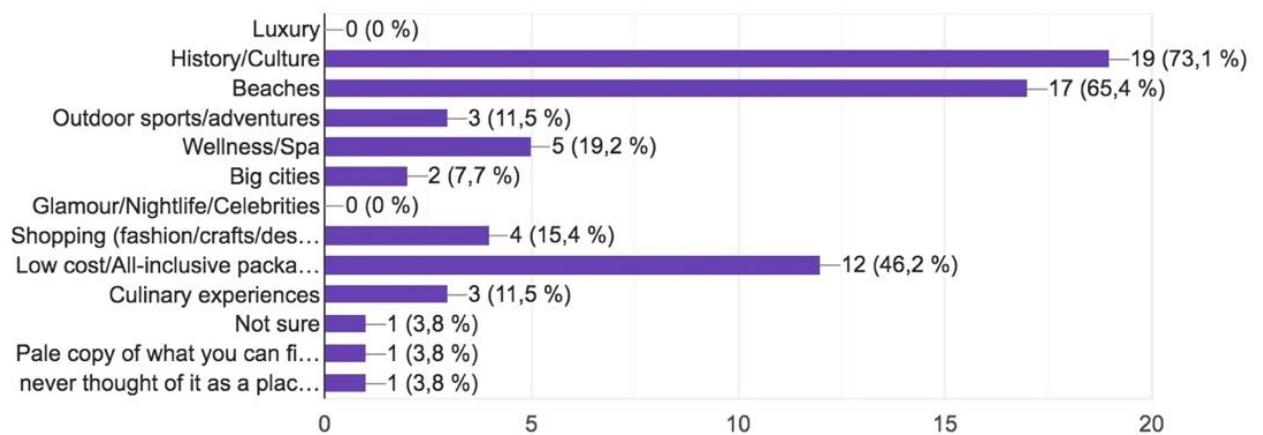


Note: please take into account only the frequencies, as n = 26

2st insight

The respondents provided some rays of hope for Tunisia, since most of the associations with Tunisia were in line with what the country has to offer in terms of natural beauty, cultural diversity, and culinary experiences. Tunisia is able to provide what people are looking for in a travel experience. The demand and the supply are in line.

Figure 17: Travelers association with Tunisia

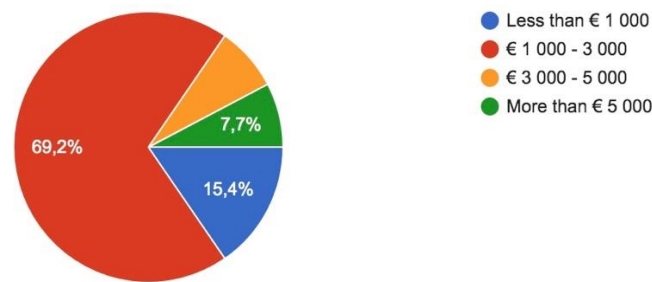


Note: please take into account only the frequencies, as n = 26

3rd Insight

More than 18 respondents said they would intend to spend more than \$1,000 for seven days in Tunisia, and some were even able to spend 5,000 euros, which is significantly more than the country's current revenue per visitor (500\$).

Figure 18 : Travelers budget for a 7 days trip to Tunisia



There are also lucrative nationalities like American respondents, who have shown an interest in visiting Tunisia. A market that Tunisia has not exploited and has not tried to attract.

4 - Recommendations to Tunisia

4.1 Recommendations based on the Spanish and Portuguese journey

- To invest in infrastructures. Our research demonstrated that infrastructures play a key role in developing luxury tourism. Tunisia should provide adequate infrastructure, such as expanding the actual Airport Tunis Chartage and building better roads connecting the major touristic cities.
- To implement Digital tools. Most Tunisian tourism establishments suffer from a lack of digital communication and online services.
- To redesign tourism organizations. The country should have efficient organizations entirely dedicated to the promotion of tourism in Tunisia.

4.2 Recommendations based on the primary research

- According to our research, Tunisia has a great opportunity in new markets, such as the American market. American respondents unanimously expressed interest in Tunisia and expressed a desire to visit it.
- Tunisia should no longer offer low-cost packages because they harm the country's brand image and keep tourism stuck in an ecosystem that offers no economic advantage on the long run and impacts the image potential wealthy tourists have on vacations in the country.
- Raise quality in order to raise prices. Most respondents indicated a willingness to pay between \$1,000 and \$5,000 for a seven-day trip, while actual receipts per tourist in 2020 are \$500.

5- Research Limitations

Data Collection Process: Since my work is based on Tunisia, we tried to contact several national organizations and hotels to have more information, but our requests were denied. The sections of this Work Project analyzing the current situation in Tunisia are therefore only based on secondary data, which constitutes a strong limitation.

Sample size: For the primary research, we were only able to get the insights from 28 respondents, which lead us to use a qualitative approach to analyze the data [a quantitative approach would have only been possible with a sample of 30 respondents minimum]. However, these respondents were carefully selected through a pre-recruiting questionnaire. Their insights were valuable for the project.

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Appendices

1 -Primary Research :

Luxury tourism in Tunisia

This survey was developed to learn about people's perceptions of Tunisia as a luxury tourism destination. It is part of research for a Master's thesis at Nova School of Business and Economics in Lisbon, Portugal.

How many times per year do you vacation abroad?

Choix multiples

- 0 - 1
- 2 - 5
- 5 +
- Ajouter une option ou ajouter "Autre"

Obligatoire

How much do you typically spend for a 7-day vacation? *

- Less than € 1 000
- € 1 000 - 3 000
- € 3 000 - 5 000
- More than € 5 000

Where do you find or research ideas for vacation destinations? (Select all that apply.) *

- Traditional media
- Social Media
- Word of mouth
- Hotel websites
- Review sites

:::

What do you look for in a vacation destination? (Select all that apply.) *

- Luxury
- History/Culture
- Beaches
- Outdoor sports/adventures
- Wellness/Spa
- Big cities
- Glamour/Nightlife/Celebrities
- Shopping (fashion/crafts/design)
- Low cost/All-inclusive packages
- Culinary experiences
- Autre...

Have you been to Tunisia? *

Yes

No

:::

Which of the following do you associate with Tunisia? (Select all that apply.) *

- Luxury
- History/Culture
- Beaches
- Outdoor sports/adventures
- Wellness/Spa
- Big cities
- Glamour/Nightlife/Celebrities

:::

To what extent do you agree with the statement "Tunisia would be an enjoyable country to visit"? *

0 1 2 3 4 5

Completely disagree Completely agree

What would be your concerns about a trip to Tunisia? (Select all that apply.) *

- Finding reliable information
- Making bookings/reservations with confidence
- Ease of getting there
- Ease of getting around
- Not having enough to do
- Quality of accommodation/facilities/infrastructure
- Water/food safety

⋮
How much would you expect to spend for a 7-day vacation in Tunisia? *

- Less than € 1 000
- € 1 000 - 3 000
- € 3 000 - 5 000
- More than € 5 000

As what gender do you identify? *

- Female
- Male
- Nonbinary
- Prefer not to say
- Autre...

⋮
How old are you? *

- Under 18 years
- 18 - 24 years
- 25 - 34 years
- 35 - 44 years
- 45 - 54 years
- 55 - 64 years
- 65 - 74 years
- 75 - 84 years
- 85 years or more
- Prefer not to say

⋮
What level of schooling have you completed? *

- Some secondary (high) school
- Completed secondary (high) school
- Some university
- Completed university
- Some graduate school
- Completed graduate school
- Prefer not to say
- Autre...

What is your employment status? *

Student

Employed part time

Employed full time

Self-employed/Business owner

Retired/Own income

Unemployed

Prefer not to say

Autre...

What is your nationality?

Réponse courte

2 – Cristiano Ronaldo X Madame Tussauds New York X “Visit Portugal”

