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CONNECT TO SUCCESS CONSULTING PROGRAM

PORTUGAL 4ALL SENSES

How to effectively reach the Brazilian market?

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Abstract

This paper attempts to assist Portugal 4all Senses, an online incoming tour agency for people with disabilities, in their effort to reach and acquire Brazilian customers. Hence, the work project centered on the *"Get-Keep-Grow"* framework with a particular focus on the "Get" stage. Using primary and secondary data sources our findings suggested that the online channels are the target's preferred communication channel. Moreover, we proposed a 3-year communication plan as well as its financial plan to assess the project's viability.

Keywords: Portugal 4all Senses, Accessible Tourism, Brazil, Communication channels

Glossary:

ACAPO - Associação dos Cegos e Amblíopes de Portugal

EAA - European Accessibility Act

ENAT - European Network for Accessible Tourism

EU - European Union

FGVT - *Fundo de Garantia de Viagens e Turismo*

GDP - Gross Domestic Product

ICT - Information and Communication Technologies

ISO - International Organization for Standardization

KPI - Key Performance Indicator

OCDE - Organisation for Economic Co-operation and Development

ONCE - Fundación Organización Nacional de Ciegos Españoles

P&L - Profit and Loss

P4AS - Portugal 4All Senses

B2C - Business to Consumer

B2B - Business to Business

PENT - Plano Estratégico Nacional do Turismo

RNAVT - *Registo dos Agentes de Viagens e Turismo*

ROI - Return on Investment

SEM - Search Engine Marketing

SEO - Search Engine Optimization

TTCI - Travel & Tourism Competitiveness Index

UK - United Kingdom

UNCRPD - United Nation Convention on the Rights of Persons with Disabilities

UNWTO - United Nations World Tourism Organization

URL - Uniform Resource Locator

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1. Introduction

Portugal for all senses (P4AS) is an incoming[1] tour operator online dedicated to accessible tourism in the Lisbon, Cascais, Sintra, Setúbal and Alentejo areas. The startup, founded in 2016 by Daniela and Rita Duarte, offers a range of accessible travel opportunities of packages and touristic experiences (Private Tours, Thematic Experiences and Holiday Packages) for individuals with reduced mobility, slow walkers and those with visual impairment.

P4AS has been focused on the Spanish, England and German markets and, having consolidated their position in those markets, the founders' next goal is to enter in the Brazilian one. To do so, it is vital for P4AS to establish a strong presence in the new market by creating brand awareness among the target audience. In that sense, the purpose of the work project is to provide recommendations to effectively reach and acquire Brazilian customers.

The structure of this project comprises four sections, namely an Internal and External analysis, Literature Review, Analysis and Recommendations. The Internal and External analysis aims to provide insights on the company's Business Model and its surroundings (environment and industry). The Literature Review consists of selecting the framework that will offer the best guidance for the next section - Analysis - which, in turn, is composed by the identification, via data collection, of both preferences of past and future customers as well as the competitors' practices. Finally, the Recommendations section, integrated within a communication plan, will include a number of actions:

- Identification of the target customer profile
- Formulation of communication channels strategies'
- Development of a financial and measurement plan

[1] Incoming or Inbound Tourism comprises, according to the World Tourism Organization (n.d.) glossary on tourism,

2. Startup assessment and diagnosis

2.1. Internal Analysis

2.1.1. Current Business Model

There are several definitions and conceptualization of Business Model. In this project we will lean on the Business Model Canvas created by Alexander Osterwalder and Yves Pigneur (2010), which defines a Business Model through the following nine components: customer segments, customer relationships, distribution channels, value proposition, key resources, key activities, partners, cost structure and revenue streams. We choose the Business Model Canvas because it is widely considered to be one of the most complex, user-friendly and flexible framework (Slavik & Bednár, 2014).

Regarding P4AS's current Business Model one can ascertain that the company is an incoming tour operator online dedicated to accessible tourism in the Lisbon, Cascais, Sintra, Setúbal and Alentejo areas (Portugal 4all Senses, personal record, 2017).

Referring to the component **customer segments** of the Canvas model, their target audience is comprised of people with reduced mobility and visual impairment as well as their respective family and friends. Additionally, and being an **inbound** tour operator, P4AS is further focused on external markets, primarily the European one, prioritizing, currently (initial phase), the Spanish, England and German markets (Portugal 4all Senses, 2017).

Moreover, and as already stated, P4AS's mission and, hence, **value proposition**, consists on supporting "people with reduced mobility, visual impairment (pioneers in Portugal) and slow walkers, their families and friends, to travel without barriers”. Thus, the services/products[2] provided (which are packages and touristic experiences comprised of already tested services) are divided into three categories: Private Tours (daily tours in the Lisbon and Sintra areas), Thematic Experiences (*Nature*, *Sports* and *Gastronomy*) and Holiday Packages (*Learn History & Heritage* and *Explore, Nature & Sports*); tailor-made Holidays at the customer request and special tours for senior citizens are also offered. All categories include suitable transport and accommodations with the possibility of complementary services such as technical equipment rental and therapists' support for maximum comfort and quality. The three service/product categories are additionally subdivided into two versions: *Adapted Tour* (for people with reduced mobility) and *Sensory Experience* (for visual impairment people). P4AS's offer is both sold to other businesses (B2B) and to consumers (B2C). Moreover, recently the company established a collaboration with Daimler, which consisted of an accessibility evaluation of an event as well as the creation of workshops and activities (on the topic of inclusion) and assistance to two participants in wheelchairs. This collaboration can represent an opportunity to take part in new fields of action, particularly in regards to events and conferences (B2B) (Portugal 4all Senses, 2018).

Concerning the **distribution channels**, these are particularly important since they are the way through which companies **communicate** and reach their customer segments and, thus, deliver their **value proposition**. **Distribution channels** can be classified in two different categories: between direct channels (sales force or web sales) and indirect ones (own stores, partner stores or wholesalers) or between owned (sales force, web sales, own stores) and partner channels (partner stores, wholesalers). Moreover, each one also has to be able to cover the following five distinct phases: (1) raise **awareness**, (2) help customers' **evaluation**, (3) allow

[2] Note: for individuals and small groups (of no more than 10 people) only.

customers' **purchases**, (4) **deliver** a Value Proposition and (5) provide **after-sales** support (Osterwalder & Pigneur, 2010).

In order to raise **awareness** (first phase) about the company's services, P4AS has selected key influencers for the target markets both in Portugal (Associação Salvador) and England (Martin Symbley); a monthly presence in the online magazine *Disability Horizons* and a partnership with a PR company for U.K. and German markets have also been developed - *Andrea Farnham PR & communication* - as well as the creation of social media pages (Facebook, Twitter, Instagram and YouTube) and participation in tourism fairs (B2C and B2B such as Naidex). Furthermore, the firm also has a TripAdvisor page (although with no reviews) which allows **customers to evaluate** and share their opinions (second phase). With respect to **customers purchases** (third phase), they are mostly done through P4AS's own sales network, more specifically their certified accessible website, albeit the non-existence of an online payment system (instead the customer is either required to fill-out a simple booking form or simply contact the company, via mail or telephone, to ask for further information); sales are also achieved through participation on international tourism fairs (specialists and generics), partnerships with outgoing tour operators that work in the target markets and cruise companies - e.g. U.K.'s *P&O Cruises* and Frances's *YOOLA* - and booking channels - *Airbnb*. Their **value proposition** is further backed by information materials concerning not only the firm's accessible offer (such as regular and audio brochures and newsletters) but also relevant events/news ("News" website page). Finally, regarding **after-sales support** (last phase) P4AS performs undocumented small-scaled informal queries after the offer in order to assess which aspects require improvements (Portugal 4all Senses, personal record, 2017).

Continuing on with the **relationship with customers**, it can range from personal to automated (Osterwalder & Pigneur, 2010). Since the company is an online agency with no physical store, the sale process and, thus, the relationship with the customers is mostly done through the internet (albeit answers to customers inquiries online being done within 24 hours, the P4AS's website does mention that the client can also call or "drop by" the physical **office** "anytime"). This customer online relationship is achieved through human interaction (e.g. one salesperson dedicated to the client) rather than automated processes (e.g CRM systems), fact that is especially relevant given that there are only two full-time employees working in the business - the two co-founders (Portugal 4all Senses, 2018).

Following up with the Canvas model, **key activities** are composed of the ones most important in the value-creation process (Slavik & Bednár, 2014). In that sense, for P4AS's it not only includes the creation of the touristic packages and the information materials concerning the firm's accessible offer but also the marketing of the brand and the services offered (essential in order to create business opportunities). However, it is important for P4AS to ensure, given its mission, that the services of the providers included in the touristic packages offered (e.g. hotels, restaurants, museums. sports activities companies, transfer companies, cultural spaces, etc) gather all the necessary conditions in terms of accessibility. Similarly, the company **key resources** include: **tangible resources** such as the touristic packages (Private Tours, Thematic Experiences and Holiday Packages), the information materials and the physical office (product of the 3-year partnership with *Startup Lisboa*); **intellectual resources** comprised of a license and insurance as a tour operator (RNAVT registry), an accessible website and access to a network of partnerships in the touristic sector (e.g. Turismo de Portugal; Associação Turismo de Lisboa, Associação

Turismo de Cascais e ENEAT – European Network for Accessible Tourism) (Portugal 4all Senses, personal record, 2017).

In respect to a company's **key partners** they can be divided into four different types of partnerships: Strategic alliances between non-competitors, Coopetition, Joint ventures to develop new businesses and Buyer-supplier relationships to assure reliable supplies (Osterwalder & Pigneur, 2010). Similarly, partnerships can also hold different motivations: optimization and economies of scale (leading to cost reducing); sharing of know-how, finance or technology and acquisition of resources/activities (Slavik & Bednár, 2014). In P4AS's case, **Buyer-supplier relationships** have been established with outgoing tour operators (e.g. partnership with operators from the U.K. and from France - YOOLA), booking channels (Airbnb) and suppliers such as hotels, restaurants, museums, cultural spaces, etc; other **Strategic alliances between non-competitors** include influencers for the Portuguese and English markets (Associação Salvador and Martin Symbley, respectively), PR company (*Andrea Farnham PR & communication*), monthly presence in an online English magazine (*Disability Horizons*), ENAT, ACAPO, Centro de Medicina e Reabilitação de Alcoitão,, Startup Lisboa (3-year partnership), Connect2Success, Turismo de Portugal, Associação Turismo de Lisboa and Associação Turismo de Cascais (Portugal 4all Senses, personal record, 2017).

Finally, referring to **revenue streams** and **cost structure**, P4AS's current cash flows stem from touristic package sales (e.g. sales were able to occur due to partnerships with operators from the U.K. and France) and from support in events and conferences (Daimler); regarding **cost structure**, currently the company has fixed costs when it comes to rental fees (shared office in Startup Lisboa), TOC services, ENAT annual quota and its strategic partners - e.g. Disability Horizons magazine and PR company *Andrea Farnham PR & communication*. Recently, the company has also incurred in variable costs related with the U.K. *Influencer*, Martyn Sibley (Portugal 4all Senses, personal record, 2017).

2.1.2. Team

The team is composed by the founders, Daniela Duarte and Rita Duarte. Background-wise, Daniela has a law degree and specialization in Health Care Law, having acquired a deeper knowledge regarding legislation in healthcare and accessibility during her working experiences. Rita, on the other hand, attained a master degree in Sustainable Tourism from University of Wageningen and has been working in the tourism area (Portugal 4all Senses, 2018).

The clear passion of both about the business, their different backgrounds, working and travel experiences have undeniably provided them the expertise required to successfully create and run this company.

2.2. External analysis

2.2.1. PESTEL analysis

A firm's industry is known to be affected by the external environment in which it resides. To understand how environmental/external factors can impact an industry's profitability one can recur to the PESTEL framework. This framework allows a comprehensive assessment of the firm's industry environment by means of analysing the various sources of environmental influences - **Political, Economical, Social, Technological, Environmental** and **Legal factors** (Grant, 2012).

Political

The **Political Factor** is related to the level of the effect that government policies have in the economy, particularly in an industry and its services. Some examples that illustrate this effect are taxation policy, foreign trade regulations, fiscal policy, trade tariffs, among others (PESTLE Analysis, n.d.).

In the past 30 years, the subject of accessibility and integration of people with disabilities has gained importance, especially, in matters of promoting the participation of these people in a society without barriers. Concerning this subject it is, therefore, vital that all future policies and strategies in the tourism sector have within them sustainability, accessibility requirements and a reliable framework of evaluation (Ambrose, Garcia, Papamichail & Veitch, 2017).

At a **global level** these concerns have been under the responsibility of the UNWTO - an agency in charge of the promotion of responsible, sustainable and universally accessible tourism. This agency has taken a leading role in this field through the implementation of a series of resolutions and guidelines (Bekiaris, Loukea, Spanidis, Ewing, Denninghaus, Ambrose, Papamichail, Castiglioni & Veitch, 2018). Further resolutions and guidelines have been implemented at the **international level** with direct impacts on the tourism industry: the **United Nations standards on equal opportunities for people with disabilities** – with the aim of building an accessible environment for people with special needs – and the **UNCRPD** which requires the existence of equal access to leisure, sport and tourism activities and an additional awareness regarding the impact of population aging in the market of special needs (Ambrose, Garcia, Papamichail & Veitch, 2017).

At the **European level** the EU has also proposed a number of sustainable policies and practices to improve the tourism and transportation industry. Concerning the tourism industry the most impactful articles were the **Lisbon Treaty** (Art.195) and the **EAA** (Bekiaris et al., 2018).

In respect to the **Lisbon Treaty**, the Article 195 leads to the development of a common european policy which reflects a very significant moment for Europe's tourism industry. Nonetheless, this Treaty excludes any harmonization at european level, which means that the responsibility for the development of the tourism industry ultimately falls on national, regional and local authorities. This lack of policy harmonization is expected to be addressed in the upcoming **EAA** proposal as its aim is to harmonize the fragmented national laws on accessibility so as to implement the UNCRPD and allow an unified travel chain or tourist practices at destinations (Bekiaris et al., 2018).

At the **national** level, a plan of action by the name of *Estratégia Nacional para o Turismo (PENT revisão 2013-2015)* has been implemented in order to transform Portugal into an accessible destination to all. In that sense, a number of strategies have been carried out which include the 2016 **"All for All" program**[3] developed by *Turismo de Portugal*; the **Support Line for accessible tourism** (which is a financing assistance of business projects and public entities); **National laws and regulations**; **Applied research, education and training** (e.g. Escola Superior de Hotelaria e Turismo do Estoril, Universidade do Algarve and Instituto Politécnico de Leiria) and an **Handbook of Management of Accessible Tourist Destinations** created by *Turismo de Portugal* (Ambrose, Garcia, Papamichail & Veitch, 2017).

[3] Program that serves as an element of support for the development of accessible destinations in Portugal through the implementation of awareness-raising actions, the provision of information for accessible infrastructures and financial funding for companies (Ambrose, Garcia, Papamichail & Veitch, 2017).

Furthermore, and focusing on the **Brazilian market** (and its customers), there are a number of bilateral agreements celebrated between Portugal and Brazil, one of them being the **Acordo de Cooperação no Domínio do Turismo**. This agreement focus on reinforcing the institutional ties between the two countries in the tourism domain as well as increasing their respective tourism flows by means of various actions - e.g. joint promotional actions of the tourist offers (AICEP Portugal Global, 2006).

In short, there are a number of in-place strategies at both the european and national level that **actively support** the Accessible Tourism industry and its firms and, by extension, P4AS. The industry's value chain, for example, benefits from policies on accessible infrastructures - e.g. the **United Nations standards on equal opportunities for people with disabilities -** and accessible tour operators gain from strategies that go from knowledge and legal to financial-based. P4AS can further benefit from the in-place **tourism bilateral agreements** between Portugal and Brazil.

Economic

Continuing on with the **Economic factors**, these are related with an economy's performance and how it directly impacts a firm and its industry - e.g. inflation rate, interest rates, economic growth patterns, among others (PESTLE Analysis, n.d.).

In regards to P4AS's' case, Portugal's GDP annual growth is, according to the OECD (2018), expected to ease and remain at above 2% in 2019 (2017's GDP Annual Growth Rate: 2.7%; 2018's GDP Annual Growth Rate: 2.2%). These figures allude to a certain stability of the Portuguese economy.

Concerning the tourism industry, political and socio-economic events in key source countries (e.g. Brazil and UK) such as the current political and economic turmoil in Brazil and the Brexit in the UK may potentially jeopardize future incoming tourism flows (Euromonitor International, 2018b).

With regards to the industry of Accessible Tourism in specific, in EU Member States alone the revenues from travels of tourists with disabilities account to €400 billion per annum (value that is predicted to grow 1% annually in the upcoming years) (Bekiaris et al, 2018). Moreover, the Brazilian travelers with disabilities, specifically, spend on average 1.510,90€ per trip, which represents the major contribution for the EU economy in terms of average spending per trip (European Commission, 2014). The industry's full potential is, although, still untapped as the lack of accessibility in the European tourism sector (e.g. infrastructures and access requirements) has resulted in an annual loss of €142 billion (Bekiaris et al, 2018).

In short, P4AS's industry (the Brazilian market, in specific) is one that has a huge **economical** and, thus, **profitability** potential. Nevertheless, the company has to keep an eye on political and socio-economic events (particularly in Brazil - target market) since these may affect future incoming tourism flows.

Social

Regarding the **Social factors**, the tourism sector has been increasingly concerned over accessibility (CBI, 2017). This is particularly relevant when taking into consideration that both the demographic group of people aged 60 or older and the rate of disability are currently experiencing a growing trend - the former is currently growing at a rate of about 3% per year, expecting to reach 1.4 billion people in 2030 and 2.1 billion by 2050 (OECD, 2018) and the latter is expected to affect 1.2 billion people by 2020 (currently 1 billion people live with some kind of disability) (Bekiaris et al, 2018). In Brazil, this growth trend is also observed, in which the percentage of people aged 65 or older increased from 7.36% to 8.94% between 2010 and 2018 and it is expected to reach 25.49% by 2060 (IBGE, 2018). Moreover, data shows that, in 2010, 23.9% (45.623.910 absolute value) of the Brazilian population had some disability being 67.7% of that value referring to people over 65 years old (Ministério do Turismo, 2014).

These **demographic trends** have a direct positive impact on the Accessible Tourism sector, increasing the number of people actively searching and in need of such services. In fact, the European Union has forecast that the demand for Accessible Tourism might reach 862 million annual travels in 2020, which is equivalent to an increase of 7.1% (European Commission, 2014).

Also important to note is that this predicted growth in demand will most probably be accompanied by an increase in both **average spending per trip,** and **customer acquisition** and **retention rate** since people with special needs not only tend to bring travelling companions but are also said to spend, on average, 28% more than people without disabilities (Bekiaris et al, 2018); furthermore, people with disabilities are much more prone to become brand advocates for the brand they love (Hsu & Powers, 2002).

In short, the Accessible Tourism market is one that will benefit from recent and future demographic trends (senior demographic and people with disabilities). These benefits will extend to P4AS, enabling them to have a considerably large target market which possesses a strong purchasing power.

Technological

The **Technological factor** refers to innovations that may affect the operations of the industry or the market. Automation, new discoveries/development, speed of technology transfers are examples that illustrate the importance of this area (PESTLE Analysis, n.d.).

Over the past decades, due to the technology evolution and automation development, a great progress has occurred in relation to the transport and tourism industries that has affected many aspects of demand and choice - e.g. the increase of low-cost companies, the internet and sharing platforms and the booking/payment options. Nonetheless, it is important to reinforce that people with accessibility needs are particularly keen to be able to access services independently and be better connected (Bekiaris et al., 2018).

In respect to the issue presented above, a report from UNWTO developed by ENAT and the ONCE, focuses on the subject of ICT in Accessible Tourism. The report mentions accessible information as a key factor in order to communicate effectively with the consumers. In that regard, information needs to follow the principles of Universal Design[4] - see Appendix 1 - so as to be appropriate for those with visual, hearing, mobility or cognitive impairments (Bekiaris et al., 2018).

Another factor to take into account is that emerging generations (Generation Z and Millennials) are known to translate into more informed and updated consumers. The same can be said in respect to tourism products and services offers, which will result in expected market opportunities for the tourism sector by 2040 (OECD, 2018).

[4] According to the World Tourism Organization (2016), Universal Design is "The design of products, environments, programmes and services to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design".

In short, P4AS needs to be able to use the technological developments in its favor. This means, in the context of accessible tourism, to provide accessible information so as to effectively communicate with the target audience.

Environmental

A business's performance and the industry in which it resides can be affected by environmental factors such as climate, weather and availability of resources, among others (PESTLE Analysis, n.d.).

Concerning the country's environmental factors, Portugal's heritage and historical past along with its warm climate (e.g. sunny beaches) makes the country extremely appealing to tourists. This is especially true when it comes to Brazilian tourists, whose visits have significantly increased in 2017, leaving them positioned only behind the tourists from the UK, Germany, Spain and France (Dinheiro Vivo, 2018). In fact, Lisbon and Porto are internationally recognized as successful touristic key cities (Euromonitor International, 2018a).

Furthermore, the tourism industry is one that is often sensitive to factors such as seasonality however, the **Accessible Tourism** industry appears to be less sensitive to this factor since people with disabilities actually prefer to travel in the low season so as to avoid overcrowded tourist sites (Bekiaris et al., 2018).

In short, P4AS can benefit from Portugal presenting itself as an increasingly attractive destination to Brazilian tourists as well as from the industry's low sensitivity to seasonality since it will be able to provide its touristic packages all year round.

Legal

Finishing off with the **Legal factors**, these are related to, for example, consumer laws, safety standards, labor laws, among others (PESTLE Analysis, n.d.).

At the **European level**, firms planning to enter the Accessible Tourism market are required to comply with the **ENAT Code of Good Conduct.** By complying with its guideline principles, tourism businesses and organizations are recognized as having made an effort to make their products accessible to tourists with access needs. The European tour operators must also comply with **legal requirements** such as the Package Travel Directive (CBI, 2018b).

At the **national level**, tour operators in general are obliged to register themselves in the RNAVT, to subscribe to the FGVT by paying a €2500 amount and to have an insurance against civil liability (Turismo de Portugal, 2018). In regards to the Accessible Tourism sector in specific, there are also legislations in force: the law on accessibility **- Decreto Lei 123/97 -** the portuguese norm for Accessible Tourism - the **NP 4523/2014 Turismo Acessível em Estabelecimentos Hoteleiros** (Ambrose, Garcia, Papamichail & Veitch, 2017) - and the decree-law on all infrastructures and urban services concerned on ensuring equal opportunities to citizens - **article 3 of the decreto-lei n.º 307/2009**.

In short, P4AS, as a tour operator, will have to comply with national-level obligations - the RNAVT registry, the FGVT subscription and to obtain an insurance against civil liability. Furthermore, and as a way to earn credibility in the Accessible Tourism industry, P4AS would gain from associating itself with national and international tourism organizations - e.g. member of ENAT.

2.2.2. Porter 5 forces

Porter's five forces framework was developed to determine the attractiveness of an industry by assessing the intensity of the competition (Johnson, Scholes & Whittington, 2005)**.** These five forces of competition include: **Threat of Entry**, **Threat of Substitutes**, **The Buyer Power**, **The Supplier Power** and **Competitive Rivalry** (Porter, 2008).

Threat of Entry

The **Threat of Entry** will depend on the extent to which there are entry barriers at the industry level (Johnson, Scholes & Whittington, 2005). There are two core categories: **(1) Structural Barriers to Entry** and **(2) Strategic Barrier to Entry** (Porter, 2008).

The **Structural Barriers to Entry** exist naturally in the market (Porter, 2008). It can include economies of scale, economies of scope and economies of learning (Johnson, Scholes & Whittington, 2005) and can be further divided into several aspects: **Absolute advantages** (e.g. access to channels, locations, key inputs, technology, amongst others (Porter, 2008)); **Brand loyalty, reputation and switching costs** which stems from a good relationship with key buyers and suppliers; **Proprietary standards and network externalities**; **Capital needs** and **Legal and regulatory barriers** (e.g. from patent protection to regulation of markets and industries) (Johnson, Scholes & Whittington, 2005). The **Strategic Barriers to Entr**y are the actions of incumbent firms to prevent others to enter (Porter, 2008).

In regards to the intensity of the threat of entry in the Accessible Tourism market, national governments and European organizations recently have been putting a lot of effort in creating accessible touristic experiences with the introduction of several regulations, financing and training programs (Ambrose, Garcia, Papamichail & Veitch, 2017). Even though, the market's entry barriers are considered to be **medium** due to several reasons.

Firstly, the European tour operators must comply with **legal requirements** such as the Package Travel Directive and common **non-legal requirements** related to reliability, liability, sustainability certification and Voluntary ISO standards to support safety in tourism industry (CBI, 2018a). At the national level **tour operators** in general and, thus, **P4AS**, are obliged to register themselves in the RNAVT, to subscribe to the FGVT by paying a €2500 amount and to have an insurance against civil liability (Ambrose, Garcia, Papamichail & Veitch, 2017).

Secondly, the success of a tourism business in the long-term is all about building **trustful relationships with the customers**. Therefore, European tour operators and, hence, **P4AS**, are compelled to provide high quality products and services (CBI, 2018b). Nonetheless, a **clear and appropriate communication** is, also, a factor that affects the relationship with the target market (consumers with disabilities) (Bowtell, 2015).

Finally, the **cost** of setting up an online business is minimal when compared with the cost of entering in a capital-intensive industry (Johnson, Scholes & Whittington, 2005). However, as an accessible-driven business such as **P4AS**, firms are required to incur in some specific expenses - e.g. accessible buildings, goods and equipment as well as costs associated with the production of adequate means to express the information to be communicated to the consumer (Últimas do 2020, n.d.).

Threat of Substitutes

The intensity of the second force of competition, **Threat of Substitutes,** depends on whether there is good availability of substitutes (products or services) and if those substitutes have good price-performance characteristics (Grant, 2012).

The market's threat of substitutes is considered to be **low** due to several reasons.

Firstly, the tourism industry's competition is known to be heavily based on factors such as climate, available attractions and activities, accessibility, value for money, among others. In this sense, Portugal appears as quite an **attractive touristic destination/market** occupying a privileged position in the international sphere as confirmed by TTCI - 14 among 136 countries (CBI, 2018b). Portugal is, however, not among the most popular **accessible** tourism destinations for travelers with disabilities (CBI, 2017); rather, countries such as the UK, Germany and other Nordic countries are the ones in which accessibility is perceived to be more evolved (Alén, Domínguez & Losada, 2012). These perceptions are supported by the fact that both the cities of North West (in the UK) and of Rotterdam (in the Netherlands) were awarded by the European Commission in the **2017's Access City Awards** - first and second place, respectively (European Commission, 2017).

Finally, **P4AS**'s offering of services to senior citizen tourists and people with disabilities is one that is perceived to be **differentiated and quality-based** (due to both accessibility and usability) and, therefore, unmatched in the remainder touristic industry (Alén, Domínguez & Losada, 2012).

The Power of Buyers

The strength of buying power that a firm faces from its customers depends on two array of factors: the **buyers' price sensitivity** and their **relative bargaining power**. The *buyers' price sensitivity* depends, in turn, on the **(1) product differentiation** and the **(2) importance of industry's product quality for buye**r; similarly, the *relative bargaining power of buyers* will depend on the **(1) size and concentration of buyers relative to suppliers**, **(2) buyers' information** and the **(3) cost of switching seller** (Porter, 2008).

The market's bargaining power of buyers (including the Brazilian buyers) is considered to be **medium** due to several reasons.

In regards to the tourism industry and focusing on the first of the two set of factors - the buyers' price sensitivity - one can consider that this **industry**'s buyers have a **low** price sensitivity since **product differentiation is high** (Alén, Domínguez & Losada, 2012) which makes them less likely and willing to switch and there is a **high importance given to the quality of the product** and how it meets their accessibility needs (Gouveia, Mendes & Simões, 2010).

Concerning the second factor influencing the strength of buying power, **P4AS** needs to take notice that buyers seem to possess a **medium** relative bargain power since, while both **access to information and the buying process (e-commerce)** are comparably **easier** nowadays, due to the advancements in digital media, **information** in regards to accessible tourism is still mostly **unavailable** and, when available, often **unreliable** (Bowtel, 2014) and **difficult to access** (e.g. for people with visual impairments) due to not being designed based on the principles of Universal Design (Bekiaris et al, 2018).

The Power of Suppliers

The **Power of Suppliers** determines the ease with which the firms in the industry can shift between suppliers (Porter, 2008). This depends on two sets of factors: **(1) Relative dependence /Price sensitivity** and **(2) Relative bargaining power**.

The **Relative dependence/Price sensitivity** depends on the importance of **supplier quality** for the industry (Porter, 2008) and on the **switching costs** (Johnson, Scholes & Whittington, 2005); the **Relative bargaining power** is characterized by the **concentration of suppliers** and availability of **information** about costs and prices (Porter, 2008).

In the Accessible Tourism market the power of suppliers is **high** due to several reasons. Firstly, the **supplier quality** in this industry is extremely relevant, since the accessibility of the tourism industry and, hence, **P4AS**'s, depends not only on the performance of the individual businesses but also on the accessibility requirements of the entire supply chain that will integrate the customer journey (information, transportation, accommodation, attractions, activities, and equipment) (Bekiaris et al., 2018). Secondly, the Accessible Tourism industry and, thus, **P4AS**, is highly **dependent on their suppliers** as a result of the reduced number in this specific target market (Portugal 4all Senses, personal record, 2017). Finally, the c**oncentration of suppliers** is, as previously mentioned, low and, since this market is still relatively new, there is a scarcity of **information about costs and prices**.

Competitive Rivalry

The **Competitive Rivalry** defines the overall competition and determines the general level of profitability. The intensity of competition between the existing businesses is the result of an interaction between nine factors: **Number of competitors**; **Diversity of Competitors**;

Demand volatility/Growth; **Product Differentiation**; **Customer switching costs**; **Infrequent orders**; **Unobservable terms of sale**; **High fixed costs and Barriers to exit** (related with excess capacity and high exit barriers) (Porter, 2008).

In this market and thus, for **P4AS**, the rivalry is **low** as a result of : a low number of **direct competitors**; companies in this market presenting **similarities** in terms of origins, objectives, costs, strategies and services provided (although P4AS being the only one to offer services specifically catered to visual impairment people); the market still being quite recent and in the **growing stage** which means that terms of sale between operators and manufacturers are, probably, still not heavily and openly discussed (**unobservable terms of sale**); Accessible Tourism being less sensitive to **seasonality**, since consumers prefer to avoid overcrowded transport and touristic places and, finally, the **fixed costs** being minimal and **initial investment** being mostly related with the acquiring of knowledge and information (Bekiaris et al., 2018).

2.2.3. SWOT analysis

Strengths	**Weaknesses**
● Strategic partnerships (Ass. Salvador; ENEAT; Disability Horizons) ● Network and know-how in tourism sector ● International experience ● Multidisciplinary team ● Member of *centro de incubação da Startup Lisboa* ● Participant in the female entrepreneurship program - Connect 2 Success ● Pioneers in the offering of touristic services to people with visual impairments	● Lack of investment capacity ● Limited human resources ● Website without payment method ● Inability to reach the senior demographic target ● Brand awareness

Opportunities	Threats
● Untapped and growing segment ● Brazilian tourists with disabilities represents the major contribution for the EU economy in terms of average spending per trip ● Portugal (Lisbon, especially) as an attractive and renowned tourist destination for Brazilian tourists in particular ● Increase of institutional interest in the Accessible Tourism segment (*Câmara de Lisboa; Associações de turismo; Turismo de Portugal*) ● Reinforcement of the law regarding the accessibility of tourist /leisure spaces ● Existence of European and national funding programs to leverage business in the tourism sector and, in particular, for the specific Accessible Tourism segment ● Increase of Lisbon hotel offers ● Direct air links with key markets ● Tourism bilateral agreements with Brazil ● Multiplication of customers ● Reduction of the seasonality phenomenon	● Other European destinations being more associated with this specific segment and having better infrastructures (Spain, United Kingdom, Netherlands, France) ● Effects of the global economic crisis ● Political instability in Europe, increased insecurity and fear of indiscriminate terrorist attacks ● Current political and economic turmoil in Brazil ● Lisbon's being perceived as a non-adequate destination for people with reduced mobility (non-accessible) ● Small number of suppliers suited to the needs of the firm's target audience

3. Literature Review

In the previous analysis, the Business Model Canvas was a practical tool to describe the company current business model in a straightforward way. Therefore, it is useful to resort to the same model to identify which block needs to be modified in order to acquire Brazilian customers. It is clear that the goal relates to one area in specific, the customer relationships, defined as the building block that describes the types of relationships a company establishes with specific Customer Segments. These relationships can be driven by: customer acquisition, customer retention and boosting sales i.e. the company needs to get, keep and grow customers relationships (Osterwalder & Pigneur, 2010).

To do so, Steve Blank proposes a diagram of the customer relationship lifecycle with the strategies and tactics to be adopted throughout the process of getting new customers, keeping them and growing their value to the business - *"Get-Keep-Grow"* framework. Steve developed two versions of the model according to the **channels**[5] a company is based on: physical or web/mobile - see Appendix 2 and 3.

To understand the flow of the process the next section intends to provide an insight of all the three phases: **Get, Keep** and **Grow.**

Getting customers (1st phase) is what drives customers into the **chosen channels** (Blank & Dorf, 2012). Regarding the **physical channels** this phase is subdivided in four **stages**: *Awareness*, *Interest*, *Consideration* and *Purchase*. In that sense, the company must deliver the message in the proper channels for customers to be *aware* of the product/service. At the same time, it needs to be done in an appealing way to make them *interested* and powerful enough for them to actually *consider* buying it. In the last stage, the ultimate "getting customers" phase goal, is when the consumers perceive the company as the best in the market and the *purchase* activity happens. The first interaction to entice potential customers into the funnel (for awareness, interest and consideration) is achieved through two main **physical channels tactics**: *Earned* and *Paid media*. *Earned media* is the free media exposure of a company, which includes press releases, online tools[6], product reviews, editorial features and a range of "guerrilla marketing" (e.g.

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[5] **Channel** is the sales and/or distribution channel; how the product gets from the company to the customer (Blank & Dorf, 2012).

[6] The *Online tools* refer to the web/mobile marketing tactics; more details will be provided below on the Literature Review when mentioning the **web/mobile channels**.

handing out brochures at fairs). On the other side, the *paid media* consists of priced exposure of the brand through media channels, such as advertising, trade shows, direct mail, catalogs, events, telemarketing and in-store promotion (Blank & Dorf, 2012).

Concerning the **web/mobile channels**, “getting customers” has two distinct **stages**: *Acquire* and *Activate*. The first stage, *acquire*, involves the process of persuading a customer to purchase a company's service through their website, mobile or cloud application. The second one, *activate*, is when the consumers fully realize the benefits of the product by paying it, signing up, becoming users or interacting with the app, which will provide an increase on their overall engagement. These stages resort to *Earned* and *Paid media* **web/mobile channels tactics** such as websites, app stores, search (SEM/SEO), email, blogs, viral, social nets, reviews, PR, free trials and landing page (Blank & Dorf, 2012).

The “Get” customers process is a hard and expensive exercise therefore, it is crucial to think on how to **keep** those customers, i.e., to give them reasons to stick with the company (Blank & Dorf, 2012).

In order to **Keep** customers (2nd phase) one has to go through two **stages** in both the **physical** and **web/mobile** channels: *Interact* and *Retain*.

To approach these two stages, companies can adopt various **tactics** which will differ depending on the channel used (**physical** or **web/mobile**). In regards to **physical channels**, businesses can resort to loyalty programs, product-update bulletins, customer-satisfaction surveys, customer check-in calls, monitoring customer-service issues and customer lock-in; with respect to the **web/mobile** channels the following tactics can be employed: customization, user groups, blogs, online help, product tips/bulletins, outreach and affiliates (Blank & Dorf, 2012).

The last phase of the *"Get-Keep-Grow"* model - **Grow** - involves the act of selling further products to already existing customers while encouraging them to refer new customers. As such, in order to **Grow** customers through both the **physical** and **web/mobile** channels, businesses are prompted to bring *New Revenues* and *Referrals*. To do so, **tactics** such as cross-selling[7], up-selling[8], next-selling[9], referrals and (possibly) unbundling[10] can be resorted when it comes to the **physical** channels; with respect to the **web/mobile** channels, companies can rely on the following tactics - e.g. upgrades, contests, reorders, refer friends, upsell/cross-sell and viral marketing (Blank & Dorf, 2012).

In the case of P4AS's, the company was allocated to the **web/mobile channels'** version of the *"Get-Keep-Grow"* framework since it's through these same channels - website - that the firm is able to sell and distribute their services.

4. Methodology

In order to meet the goals of our work project, i.e., to identify P4AS's customer acquisition strategies in their current markets and to provide recommendations to successfully reach the Brazilian one, we will analyze the following primary[11] and secondary[12] data in regards to the **competitors' tactics**, **P4AS's current tactics** and the **Brazilian consumers' search process**.

[7] Practice in which the purchase of **related** or **complementary products** is encouraged to customers (Osborne, 2015).
[8] Practice in which the purchase of **comparable higher-end products** is encouraged to customers (Osborne, 2015).
[9] Customer growth strategy that focuses on the customer's **next** order (Osborne, 2015) .
[10] Splitting an item or service into several products and charging them separately (Osborne, 2015).
[11] Primary sources are original materials on which other research is based (McQuade Library, 2018).
[12] Secondary sources are those that describe or analyze primary sources (McQuade Library, 2018).

Firstly, the data collection of both **national** and **international competitors** intended to identify the **tactics** most commonly used in the Accessible Tourism industry. To do so, we resorted to secondary data available in the companies' websites. **National-wise**, the competitors - Tourism for All, Go Gal, WaterLily, My Portugal for All, Adapted & Senior Tours Portugal - were determined by resorting to the **Pantou** - European Directory of Accessible Tourism (Pantou, n.d.). **International-wise**, the competitors that offer accessible tourism packages in Portugal - UK's Enable Holidays and Disabled Holidays Ltd, Canada's Travel For All, Spanish's Accessible Madrid and the Netherlands' Accessible Travel- were determined by resorting to the "Accessible Travel Online Resource" guide from the travel book publisher *Lonely Planet* (Lonely Planet, 2015). In respect to direct competitors from Brazil, the selection and research process only yield one result - Accessible Tour.

Secondly, to gather insights on the effectiveness of the **P4AS's current tactics** we collected **qualitative** data with the company's past clients and **quantitative** data through both a survey and a web analytics tool – **Google Analytics** (Google, n.d.). Our survey - see Appendix 4 - starts off with demographic questions (gender, age, location and type of limitation) so as to be able to find out who is P4AS target audience (audience segmentation or customer profiling). By realizing the possibility of having clients who had already experienced travelling abroad before using P4AS, it was firstly asked how often the customers use certain channels in the search process of these kinds of services followed by questions to understand **P4AS existing customers' process,** in specific which channels they used to discover the company, to further complement that information search and to proceed with the payment. Questions were then asked in order to understand the customers' satisfaction with the existing channels, particularly with the website and social media networks, subsequent by which factors they would improve in each respective channel. Finally, the survey tries to understand what customers perceive that differentiates P4AS from the competition and their likelihood to become brand advocates. The quantitative data gathered through the **Google Analytics** tool provided information regarding the **location** of the **new users**, which **channels** people are finding the company and the **devices** used. Moreover, to be able to measure the company **customers' satisfaction** with the existing channels, particularly with the website, it was necessary to compare P4AS's engagement values with the "*Specialty Travel*" industry ones provided by Google Analytics. To do so, the following Google Analytics metrics were selected: bounce rate[13], pages per session[14] and average session duration.

Finally, to assist P4AS in the acquisition of **Brazilian customers**, there is a need to identify who they are and their preferred channels of choice in regards to the **search process** of accessible tourism services. The **secondary** data analyzed was retrieved from the IBGE 2010 Census and from a research conducted in 2013 by the Brazilian Ministry of Tourism. Through the 2010 Census, the profile of the Brazilian tourist with disabilities (who) was able to be defined based on demographic characteristics such as sort of limitation, age and gender and Brazilian state whereas the 2013 research provided information about their characteristics, behaviors and needs. The **primary** data collection was based on a survey conducted on the target consumers with the aim to understand their experience in the information search process regarding accessible tourism services - see Appendix 5. The survey conducted was created following the same structure mentioned before: identifying the Brazilian tourist profile (characteristics such as

[13] The percentage of single-page sessions in which there was no interaction with the page. A bounced session has a duration of 0 seconds (Analytics Help, 2018).
[14] The average number of pages viewed during a session. Repeated views of a single page are counted (Analytics Help, 2018).

client type, age and gender) and their preferred channels of choice when searching for accessible tourism services. Concerning the preferred **channels of choice,** it was asked how often the Brazilian consumers used certain channels in the search process of accessible tourism services. Also, given that P4AS sells and distributes their services through their website, it was relevant to ask the importance given (from 0 to 5) to certain factors for this specific channel. These questions were then proceeded by one on whether the surveyed consumers had travelled abroad in the past and, if so, if they had resorted to a travel agency or tour operator specialized in accessible tourism. If the consumers answered affirmatively to both questions, further information was asked in order to assess the customers' satisfaction with the website and social media networks of the specific agency and/or tour operator utilized as well as possible improvements. Finally, the survey tried to understand the reason why the customers, when travelling abroad, had chosen the specific accessible tourism provider and how they proceed with the payment.

5. Analysis

An analysis of the data collected in regards to the **competitors' tactics**, **P4AS's current tactics** and the **Brazilian consumers' search process** was performed.

5.1. P4AS's competitors' tactics

In order to summarize the information gathered about each **P4AS's competitor**, a table was created - see Appendix 6. Tactics like social media (Facebook, Twitter, LinkedIn, TripAdvisor, Youtube, Pinterest, Google+, Instagram), website, newsletters and a website's blog were the ones that the competitors most resorted to. The companies mentioned (except Go Gal) were also found to have established at least one of the following three types of partnerships:

Strategic alliance between non-competitors, Buyer-supplier relationships and Coopetition. Buyer-supplier relationships, in specific, include partnerships with companies from a broad range of categories such as accommodation, leisure, restaurants, guided tours, transport services, airlines, social media, blogs, NGO's, mobility equipment, travel agencies and care assistance/health companies. Although most companies do not offer an in-website purchasing option (8 out of the 11 competitors), the vast majority still provides on the website at least a detailed enquire form or a basic two-step reservation. Moreover, the competitors also have a "Frequently Asked Questions" page (5 out of 11), Facebook reviews (6 out of the 11) and an in-website online review platform (4 out of 11) - e.g. TripAdvisor.

5.2. The P4AS's current tactics

The survey with the company's past clients did not collect enough (3 out of 128 clients) and useful answers in the stipulated running period which makes it impossible to proceed with the analysis and extract reliable and representative conclusions. In that sense, solely the data from the company's **Google Analytics account** will be used for this specific analysis.

The tracking period considered for **P4AS's Google Analytics data collection** was from October 21st of 2016 to April 11st of 2018, in which the total number of **new users**[15] was 2,127.

Regarding the **location** of the **new users,** it was possible to identify the top source countries: Portugal (48.00%), United States (17.25%), United Kingdom (5.64%), Germany (4.33%) and Brazil (4.23%) - see Appendix 7. Concerning the **channels** used to find the company's website, among the 2,127 new users, 47.39% do it **directly** (website's URL) while

[15] The number of first-time users during the selected date range (**note:** if a user switched devices, browsers, entered in a private browsing or cleared their cookies he will be counted as a new "new user"(Batista, 2016)

42.27% encounter it through **organic search** followed by **referrals** (6.86%) and **social** (3.34%) - see Appendix 8. More specifically, sources[16] such as the Google search engine, Facebook and the naidex.co.uk[17] website are the most relevant ones ranking-wise - see Appendix 9. In respect to the **devices** used, the large majority of new users resort to desktop (82.60%) followed by mobile (14.15%) and tablet devices (3.24%) - see Appendix 10. Finally, data shows that P4AS outperformed the industry in all the three engagement metrics selected: 44.57% of the firm's customers had no interaction with the page versus the 52.29% of its industry peers; the average number of pages viewed during a session was of 3.08 in regards to P4AS while 2.78 for the industry and, in average, the company's users spent 1 minute and 5 seconds more in each session than the recorded - see Appendix 11.

5.3. Brazilian consumer search process

The **2010 Census** shows that 23.9% of the Brazilian population has, at least, one **type of disability** - visual, hearing, motor or mental / intellectual. The highest occurrence is represented by visual deficiency, affecting 18.6% of the Brazilian population; the second most common disability is the motor deficiency, with a 7% rate; in third place is the hearing loss (5.1%) and, finally, the mental or intellectual disability, representing 1.4%. Concerning the **age groups**, it was verified that among the people that have, at least, one type of disability, 7.59% belonged to the 0-14 age range, 71.50% within the ages between 15-64 years old and 20.91% when it comes to population aged 65 years old or more. Referring to **gender**, the number of women with at least one disability represents 26.5% of the female population, which is higher than the 21.2%

[16] The Source is the place users are before seeing the content, like a search engine or another website (Analytics Help, 2018)
[17] Naidex is Europe's largest disability event for trade, healthcare professionals and end-users (Naidex, 2018)

regarding the male population. Furthermore, it is important to consider that the Brazilian population is in an aging process, and that the male mortality rate is higher than the female's. Therefore, the rate of senior women with disabilities (65 years old or more) is greater when compared to men (females percentage of visual, motor and mental disabilities was higher than male's). The **states** with the highest percentages of population with at least one of the types of disabilities investigated are located in the Northeast of Brazil, more specifically in Rio Grande do Norte, Piaui, Paraíba and Ceará (IBGE, 2012).

According to the **2013 study**, and in respect to the **media habits** of the Brazilian tourists with disabilities interviewed, it was possible to identify the Internet as the main media channel used (used by all the interviewees and during the longest amount of time), followed by television (similarly widely used albeit with a more varied range of time spent on it). Internet, in specific, was referred to as a research and information medium as well as a place to interact with likeminded people. Media channels such as travel magazines, travel books, ads on tv and radio, materials published in newspapers and pamphlets found at a travel agency were, on the other hand, seldom mentioned. Indeed, the study reveals that customers receive the information about this kind of services mostly through the internet. Specifically, they often resort to the internet to contact family/friends asking for advices and in some cases people/friends they met online (via social networking, chat rooms or others). However, the information necessary to plan a trip for customers with such specific needs is quite extensive (hotels, transports, activities, others) so, it is usually disperse in several places. Additionally, what they do find, frequently does not exactly match with the reality, which leads to the information provided not only being perceived as insufficient and not detailed enough but also not reliable. Consequently, people with disabilities tend to rely on more than one source (Ministério do Turismo, 2013).

The **survey** conducted on the target consumer shows that, in respect to the **type of client**, the majority are clients in wheelchairs (79%), followed by reduced mobility (7%), blind or partially blind (6%), deaf or hearing impairment (4%) and senior (4%) - see Appendix 12. It was verified that more than 50% of the people surveyed belonged to the 32-51 **age** group; referring to **gender**, 60% were women and 40% were men - see Appendix 13 and 14, respectively.

Concerning the preferred **channels of choice,** the data was analyzed resulting in the following ranking[18]: search engines (2.00), family/friends/colleagues (2.29), Facebook (2.55), company's website (2.58), blogs (2.70), Instagram (2.74), other websites (2.91) and YouTube (3.00) - see Appendix 15. Among the website factors presented in the survey, the ranking of the most important ones (mean higher than 4) were "Informação detalhada sobre acessibilidade" (4.67), followed by "Acessibilidade do Website" (4.31) - see Appendix 16. The survey also revealed that 57% of the consumers had already travelled overseas and that, among those, only 22% had resorted to a company specialized in accessible tourism - see Appendix 17 and 18 respectively. The results demonstrate that, overall, customers were satisfied with the company's website and social media pages (excluding twitter) - see Appendix 19 - recommending, however, improvements focused on the "Utilidade de conteúdo das publicações" for the social media - see Appendix 20 - and the "Informação disponível sobre acessibilidade" (since it is considered, by most, to be insufficient) for the website - see Appendix 21 and 22. Finally, it was verified that better offers along with detailed and credible information about accessibility were the most relevant factors for achieving a competitive advantage - see Appendix 23 - and that the majority of the Brazilian consumers pay for the services via a physical store - see Appendix 24.

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[18] The range varied between "1", that was attributed to the category "Sempre", and "5" that was assigned to the category "Nunca" therefore, the ranking was determined as follow: the channels with the lowest mean values were the ones that recorded the highest frequency.

6. Recommendations

The recommendations to reach the Brazilian market will be articulated on a 3-year communication plan built upon the *"Get-Keep-Grow"* framework. This plan, based on the data retrieved from the *Analysis*, will be structured as follow: identification of the target customer **profile**; formulation of the "Get", "Keep" and "Grow" tactics and development of a measurement and financial plan.

The analysis allowed to define the target customer **profile** by selecting, among the commonly used variables when performing an audience segmentation, the ones with the most insightful results - location, age, type of disability and consumer media habits. The Brazilian target customer is, hence, a 32-51 years old' wheelchair user that is particularly digital-oriented. Given the fact that the census does not provide information regarding the proportion of each type of disability per region, the **location** chosen was the Brazilian country. In respect to the **age,** the range with the highest incidence of disabilities retrieved from the census was narrowed down according to the survey results to 32-51 years old and the **type of disability** category derived from a combination of the survey and census' findings. The characterization of the target consumer as being **digital-oriented** is deducted from the 2013 research conducted by the Brazilian Ministry of Tourism. Once the customer profile was determined, the tactics for the "Get", "Keep" and "Grow" stages were defined.

6.1. "Get" Tactics

Concerning the "Get" stage, the recommendations will focus in the creation of effective marketing campaigns on the Brazilians' most used channels. According to the ranking of the preferred channels of choice constructed in the analysis - see Appendix 15 - and, after taking into account the founders' feedback, the following communication channels were selected: Search Engine and Facebook.

To reach the Brazilian customer through **Search Engines**, one can resort to two approaches: **SEO** and **SEM**. When creating either an SEO plan or a SEM campaign, it is necessary to perform a **keyword research**, meaning finding out the words and phrases the firm's potential customers are searching for (Google, n.d.) To do so, it is recommended that P4AS use the **"Keyword Planner"** tool since it is included within Google AdWords, which is a platform that will be recurred to when performing the SEM campaign **-** see Appendix 25 for the keyword research process.

A **SEO** plan focuses on in-site optimization (content and structure of the website) and off-site optimization to increase the chances of a website appearing in the **unpaid** organic results (Google, n.d.). This improvement of the ranking on organic results is especially relevant when it comes to increasing brand awareness and conversions[19] since, according to Pat Ahern (2018, Oct 26), 75% of people never go past the first page of search results and that the conversion rate of SEO leads (14.6%) is significantly higher when compared to that of outbound leads (1.7%).

The first in-site SEO recommendation consists in PA4S providing a version of the original website in the target's language - PT/BR - and, for example, converting the currency to reais (R$). Once the aforementioned step is finalized, one will have to tweak the (individual) pages on the website, specifically the HTML of the **titles** and **meta tags**, **URL** and the **page copy** itself, according to the keywords previously selected – see Appendix 26 for detailed guidelines. These alterations are relevant since Google will display each specific web page on the search

[19]A completed activity, online or offline, that is important to the success of your business which, in this case, would be a purchase (Analytics Help, 2018)

results based on the title, meta tags defined and the URL. An effective **SEO** plan also includes off-site optimizations that can be achieved by motivating websites relevant to P4AS's services (such as blog "Cadeira Voadora" - see more examples in Appendix 27) to create backlinks[20] or articles talking about the company (Google, n.d.).

A **SEM** Campaign consists of **paid** advertisement on search engines (payment-per-click) (Google, n.d.). It is a powerful and effective marketing option since it targets people who already have an interest and are, hence, more likely to convert into sales (James, 2015) (average conversion rate of 3.55% for the Travel and Hospitality industry (Gabbert, 2018)). Data shows that the combination of SEO and SEM can lead to a 25% increase in clicks, an increase of up to 200% in a company's conversion rate and a 27% increase in profits (Pick, 2015).

To create an **SEM campaign** one should resort to Google AdWords which will imply making decisions on the following settings: campaign type, campaign goal, campaign name, networks, locations, languages, budget, bid strategy, start and end dates, ad rotation and campaign URL options (Google Ads Help, 2018). In the case of P4AS, the specific campaign recommended will focus on creating brand awareness, therefore, to increase the probability of attracting more customers it should include an advertising of, for example, a discounted touristic package (limited time offer) - see Appendix 28 for the SEM campaign guidelines.

To create brand awareness for the Brazilian customer through **Facebook**, P4AS should resort to **Facebook advertising** via the "**Ads Manager**" platform (paid) and/or promotion through **third-parties Facebook pages** (free). Both approaches are equally viable when it comes to achieving the aforementioned goal with the first option, Facebook advertising, being especially

[20] Backlinks is the term for a link from another website to your site (Google, n.d.)

effective to reach a wider number of the target audience while the second option gains mostly from being free.

In the case of P4AS, although the recommended **Facebook advertising campaign** will focus on creating brand awareness it should also strive for a certain action and/or interaction with the business by including, within the ad, for example, call-to-action buttons linked to the company's touristic packages webpages - see Appendix 29 for a more detailed campaign guidelines.

Going into the free promotion through **third-parties Facebook pages**, the suggestion for P4AS is to propose mutual beneficial offers (e.g. each party writing a promotional Facebook post about the other) to facebook pages of bloggers and influencers relevant for the target audience (Influencer Marketing) and that have a considerable number of followers and engagement - *Cadeira Voadora*, *Turismo Adaptado*, *Blog do Cadeirante* and *Casadaptada.* According to a study, 50% of marketers consider influencer marketing effective in attracting better quality leads to the business and, hence, more conversions and higher revenues. In fact, another study revealed that social media influencers are able to increase revenues by 11 times (Buryan, 2018).

6.2. "Keep" Tactics

In regards to the "Keep" stage, the tactics to *Interact* and *Retain* customers should aim to understand and optimize the customer touchpoints in order to improve the customer experience since, according to a McKinsey research (2017), companies that do so have a 80% more likelihood of retaining customers.

In that sense, among the recommended tactics for this stage, the ones more suitable for P4AS's business were the following: "frequently asked question" (online help), blog, customer-satisfaction survey and loyalty program. The first one was chosen based upon the survey results' of the questions Q15 and Q16 - see Appendix 21 and 22 - and the competitors' practices retrieved from the benchmark analysis which leads to the inclusion of a **"frequently asked questions"** section on the website (online help) in order to provide more information about accessibility in a swift and easier way. Furthermore, the insights gathered in the benchmark analysis and the survey results of the Q7 - see Appendix 15 - have shown the importance of **website blogs** as a communication channel consequently, it is suggested that P4AS modify the "News" page into a blog format page. The introduction of a formal **customer-satisfaction surveys** is advised in order to obtain feedback on the client's pain and pleasure points (through Google Forms, for example). **Loyalty programs** are also recommended especially given that 64% of retailers say that loyalty/rewards programs are extremely effective when connecting with consumers (Saleh, n.d.). In the case of P4AS, and examining the most commonly used ones in the Travel and Hospitality industry - see Appendix 30 - such programs can include referral discounts, promotional discounts or even special offers tailored to the clients interests based on their past purchases (Dent, 2017). All of the aforementioned tactics will have a direct impact on the next phases of the marketing funnel *New Revenues* and *Referrals* - "**Grow"** stage.

6.3. "Grow" Strategies

Concerning the tactics to bring *New Revenues* from previous customers and *Referrals*[21] to the business, the ones more appropriate for P4AS were the following: **loyalty programs** and **referrals**. As already mentioned in the "Keep" stage the **loyalty programs** employed will also

[21] Referral selling consists of acquiring new customers through suggestions or referrals of existing customers (BusinessDictionary, 2018)

foster new revenues and referrals to the company. The **referrals** tactics employed include **online reviews** and **word-of-mouth**, with the former having been based upon the benchmark analysis in which competitors have Facebook reviews and in-website online reviews and the latter based on the survey results, in which word-of-mouth (family/friends/colleagues) was found to be the Brazilians' second most used channel - see Appendix 15. Both tactics will be integrated within the customer-satisfaction survey by adding in the last page a final comment to remind and encourage customers' **word-of-mouth** and the writing of **online reviews**. Furthermore, P4AS should take advantage of their already existing TripAdvisor page and incorporate its' reviews in the company's website via a widget. The choice of these simplified tactics stemmed from the fact that there was a limited available budget.

6.4. E-mail marketing

Considering that the "Keep" and "Grow" stages refers to tactics for past clients and P4AS has access to these specific contacts through email, the best channel option for the company to reach them would be to recur to **e-mail marketing**. To do so, given the firm's budget constraints, P4AS should resort to a free software system for e-mail marketing. Regardless of which specific email tool is chosen, they all share a few common features that will allow the company to send out pre-scheduled, personalized emails to their past clients'[22] contact list. In the case of P4AS it is recommended the creation of two email categories content-wise: one containing the customer-satisfaction survey (which includes the online review and word-of-mouth encouragement) and the other with the loyalty program (e.g. emails with transferable coupons, discounts on future

[22] Note that all emails should include an opt-out subscribing option in order to protect from possible ethical issues (Thomson Reuters, 2016)

purchases or even special or new offers). All emails created should have short, concise, engaging subject lines and content and the links included should foster for calls to action [23] (Google, n.d.).

6.5. Measurement plan

In order to understand the value of the Digital Marketing recommendations proposed, one can rely in the "Digital Marketing and Measurement Model" by Avinash Kaushik, which defines as general steps the identification of business objectives, the goals for each objective, the Key Performance Indicators (KPIs), the targets and the valuable segments for analysis (Kaushik, n.d.) - see Table below for P4AS's measurement plan.

<table>
<tr><th colspan="3">Tactics</th><th colspan="4">Measurement Plan</th></tr>
<tr><td rowspan="5">"Get" Tactics</td><td rowspan="4">SEO</td><td rowspan="3">Acquire</td><td>Objective</td><td>Measure (KPI)</td><td>How to measure</td><td>Target</td></tr>
<tr><td rowspan="2">Create brand awareness</td><td>Average Ranking/Position</td><td>Google Search Console</td><td>Top 3</td></tr>
<tr><td>CTR=#Clicks / Impressions * 100</td><td>Google Search Console</td><td>[32.5% - 11.4%][24]</td></tr>
<tr><td>Activate</td><td>Drive Sales</td><td>Conversion rate = #Sales/#Clicks *100</td><td>Manually[25] Google Analytics</td><td>14.6%[26]</td></tr>
<tr><td>SEM</td><td>Acquire</td><td>Create brand awareness</td><td>CTR=#Clicks / Impressions * 100</td><td>Google AdWords</td><td>Average CTR = 4.68%[27]</td></tr>
</table>

[23] Encourage recipients to click on the link
[24] Benchmark value from https://www.wikiweb.com/google-ctr/
[25] The # of Sales manually via customer-satisfaction survey (to past clients by asking how they found the company) and the # of Clicks via Google Analytics
[26] Benchmark value from https://junto.digital/blog/seo-stats-2017/
[27] Benchmark value from https://www.searchenginejournal.com/data-whats-good-ctr-cpa-conversion-rate-adwords-2018/248947/

"Get" Tactics		*Activate*		Drive Sales	Conversion rate = _#Sales/#Clicks *100_	Manually[28] Google AdWords	Average Conversion Rate = 3.55%[29]
				Create a cost-effective ad	Cost per conversion/action[29] = _CPC/Conversion rate_	Manually[30] [Conversion Rate = _#Sales/#Clicks *100_]	$44.73[29]
	Facebook	**Ads Manager**	*Acquire*	Create brand awareness	# Interactions CTR	Ads Manager (reports)	# Interactions = 559[31] Average CTR = 0.90%[32]
			Activate	Drive Sales	Conversion Rate = _#Sales/#Clicks *100_	Manually[33] Ads Manager (reports)	Average Conversion rate = 2.82%[32]
				Create a cost-effective ad	Cost per Action = _(Cost per 1000 people/1000)/Conversion rate_	Manually[30] [Conversion Rate = _#Sales/#Clicks *100_]	$22.50[32]
		Third-parties Facebook pages	*Acquire*	Create brand awareness	Engagement rate per post = _Total Engagements/# of Followers_ [34]	Manually	0.37%[35]

28 The # of Sales manually via customer-satisfaction survey (to past clients by asking how they found the company) and the # of Clicks via Google AdWords

29 For the benchmark of the Cost per action, the action was assumed to be a sale. An **action** is an activity that happens on the ad**. Actions** that occur on the ad include link clicks, outbound clicks, post engagement, video views, and more (Facebook Business, 2018)

30 The # of Sales manually via customer-satisfaction survey (to past clients by asking how they found the company) and the # of Clicks via Google AdWords

31 Benchmark value from https://trackmaven.com/blog/facebook-advertising-budget/

32 Benchmark value from https://www.wordstream.com/blog/ws/2017/02/28/facebook-advertising-benchmarks

33 The # of Sales manually via customer-satisfaction survey (to past clients by asking how they found the company) and the # of Clicks via Ads Manager

34 Formula from http://www.aamplify.partners/stories/what-is-a-good-facebook-engagement-rate

35 Benchmark value from https://www.rivaliq.com/blog/2018-social-media-industry-benchmark-report/

			Activate	Drive Sales	Conversion rate = *#Sales/#Clicks *100*	Manually[36]	[1%-3%][37]
“Keep” Tactics	**Online help**			Create interaction and retain clients	Ranking (customer satisfaction survey) Bounce rate of the web page Average time on page = *Avg. session duration /#Pages*	Survey results Google Analytics [#Pages = 3.08 Av.session duration = 3 min. 14 seg]	Ranking [0-5] - 4/5 Bounce rate[38] = 44.57% Average time on page[38] = 1 min. 3 seg
	Blog				Ranking (customer satisfaction survey) Bounce rate of the web page Average time on page = *Av.session duration /#Pages*	Survey results Google Analytics	Ranking [0-5] - 4/5 Bounce rate[38] = 44.57% Average time on page[38] = 1min 3 seg
	Customer-satisfaction survey				Response rate = *answers/total # of clients *100*	Surveys results (% answers) Manually	Response rate = 90-100%

[36] The # of Sales manually via customer-satisfaction survey (to past clients by asking how they found the company) **or** via a unique discount (if the influencer’s post includes an unique discount code and/or a link to P4AS’s website) and the # of Clicks via Google Analytics by providing each influential blogger with a tracking pixel - e.g. unique URL (Leibowitz, 2017 September 19).

[37] Benchmark value from https://cdn2.hubspot.net/hubfs/418657/Brand-Collateral/Reports/Influencer_Marketing_2016_Benchmarks.pdf

[38] The benchmark value was retrieved from Google Analytics since P4AS outperformed the value of benchmark of the “Specialty Travel” Industry.

	Loyalty program - Discounts and codes - New or special offers	Create interaction, retain clients and grow revenues from past clients	Conversion rate= = # codes used/ Total # codes sent *100 Click-to-open rate of the emails = # Clicks/# Opened emails *100	Manually[39] Email marketing tool	Conversion rate = 5%[40] Click-to-open rate = 12.30%[41]
"Grow" Tactics	**Online reviews**	Generate referrals	Ranking (0-5)	Platform defined - TripAdvisor Facebook Reviews	Ranking [0-5] - 4/5
		Drive Sales	Conversion rate = Referral rate = # referred purchases/# of total purchases*100	Survey Results Manually	2.30%[42]
	Word-of-mouth				
E-mail marketing	**Order Follow-Up emails** - **1.** Customer survey + Referral + Review **-2.** Loyalty program	Create quality marketing emails	**1 + 2** Open rate Unsubscribed rate	Email marketing tool	Open rate = 23.06%[41] Unsubscribed rate = 0.21%[41]

In regards to the table above, it is important to note that to measure the effectiveness of the **SEO plan** P4AS should resort to a free Google service called **Search Console** that provides information about the website performance in Google search results based on the queries[43] (Google, n.d.). Additionally, alongside the Google Analytics tool, P4AS could rely on the customer satisfaction survey to not only be able to assess from which channel/campaign came each sale and measure their success but also to measure the success of the online help and "Blog"

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[39] By checking if the client used the code or not when purchasing

[40] Benchmark value from https://pureb2b.com/blog/email-marketing-conversion-rate-comparison/

[41] Benchmark value from https://www.getresponse.com/resources/reports/email-marketing-benchmarks.html

[42] Benchmark value from https://www.referralcandy.com/blog/referral-rates/

[43] The Google Search queries (keywords) that generated impressions of the website's URLs in Google organic search results (Analytics Help, 2018).

webpages' through the inclusion of questions referring to the customers' thoughts in regards to those specific pages.

6.6. Financial plan

A 3-year projected Profit and Loss statement and a Scenario analysis were performed to be able to understand and measure the financial success of the recommendations given.

The projected Profit and Loss statement (P&L) started by determining P4AS's expected Total Sales of the marketing communication plan. To do so the ROI formula was used:

- P4AS's expected ROI was computed by averaging the benchmark Median ROI of each tactic' marketing channel[44] (Median ROI for e-mail marketing: 124%; Median for Social Media: 30%; Median for Paid Search: 23%)
- The projected total expenses/total budget was defined by resorting to the benchmark value stating that new companies are recommended to allocate 12%-20%[45] of their gross revenue on marketing.
  - The estimated costs for each tactic are expressed in the Appendix 31. The costs for the website alterations (**SEO plan**, **Blog**, **FAQ** and **TripAdvisor**) were retrieved from P4AS's website designer and the remaining budget was allocated for the paid campaigns (SEM, Facebook).
  - The gross revenues considered for the budget were the ones from 2018 to 2020. The value of 2018 was retrieved from the gross revenues of the

[44] The computed expected ROI for P4AS only took into account the E-mail, Social media and paid search channels since the information available on the ROI of an SEO plan was scarce and unreliable (Statista, n.d.)
[45] Benchmark value from https://www.wordstream.com/blog/ws/2016/10/26/marketing-budget

company in that year whereas the two following years were estimated via a benchmark[46] growth rate of startup firms in their second and third years.

The Scenario Analysis comprised of three scenarios that differed depending on the percentage of gross revenue used to allocate the marketing budget (12%, 16% and 20%) and the cost of the “Optimization of the individual webpages” (SEO):

- **Pessimistic Scenario:** lowest marketing budget and highest “Optimization of the individual webpages” cost (314.88€)
- **Realistic Scenario:** average marketing budget and “Optimization of the individual webpages” cost (277.98€)
- **Optimistic Scenario:** highest marketing budget and lowest “Optimization of the individual webpages” cost (241.08€)

The projected profits (for the 3 years) for each of the above scenarios are expressed in the figure below - see Appendix 32 for details on the inputs of the P&L calculations.

	Projected Profit & Loss Statement (for 3 years)			FORMULAS
	Pessimistic Scenario	Realistic Scenario	Optimistic Scenario	
Projected Sales Revenues	20 833 €	27 778 €	34 722 €	
Projected Total Expenses (fixed and variable)	13 103 €	17 470 €	21 838 €	
Projected Profit (Loss) (Revenue-Expenses = Profit)	7 731 €	10 307 €	12 884 €	
Estimated Return on Investment (ROI)	59%	59%	59%	*ROI = (Project Sales Revenues - Projected Total Expenses)/Projected Total Expenses * 100*

Projected Profit & Loss Statement

[46] Benchmark values from https://www.equidam.com/average-growth-rate-for-startups/

Given that the average estimated ROI (calculated by averaging the benchmark Median ROI of each tactic' marketing channel) is 59% regardless of Scenario, all of them generated a positive profit. This is because the channel tactic that has the biggest impact on the average ROI is the e-mail one which is free of charges and, hence, not dependent of the available marketing budget. In that sense and according to the results, the optimistic scenario is the one with higher profit therefore, it is recommended that P4AS pursue this one and invest 21 838€ in the communication plan. However, the relatively low discrepancy between the profits obtained in the different cases provides to the company a certain flexibility to adapt the budget based on their financial availability.

7. Limitations

In regards to the survey performed on the Brazilian target customers, a number of **limitations** that might have lead to biased information need to be taken into consideration:

1. The target population was contacted solely via specialized Facebook pages[47] due to their specific characteristics (Brazilian consumers with disabilities).
2. Our results should be interpreted with caution, due to the small size of our sample (n=68), thus they might not be extensively representative of the population.

8. Conclusions

Summing up, this paper provided useful insights to effectively reach the Brazilian market, more specifically the target profile identified (32-51 years old' wheelchair user that is particularly

[47] Examples of specialized Facebook pages used were the accessible tourism blog *Cadeira Voadora, Turismo Adaptado, Cultura Surda, Navegar Turismo Sênior Crônicas de Surdez*

digital-oriented). Based on those findings a communication plan was proposed in which it was recommended a number of “Get”, “Keep” and “Grow” tactics to be implemented in the following 3 years. The “Get” tactics included a SEO plan, a SEM campaign, Facebook advertising campaign and a promotion through third-parties Facebook pages; the “Keep” one's comprised of a “frequently asked questions” section on the website (online help), a in-website blog, the introduction of a formal customer-satisfaction surveys and loyalty programs; the “Grow” tactics encompassed the previously mentioned loyalty program as well as referrals, namely through the encouragement of online reviews (TripAdvisor widget) and word-of-mouth. The aforementioned “Keep” and “Grow” tactics will be delivered via e-mail marketing.

In order to track the progress and success of the proposed tactics it was defined, for each one, KPIs and respective targets (based on benchmark values), and measurement methods. To understand and forecast the financial success of the recommendations given, it was also created a 3-year projected Profit and Loss statement and a Scenario analysis in which it was concluded that P4AS should pursue the Optimistic scenario since, although requiring a bigger investment, it is also the one that generates the highest profit.

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