

# Brazil

## Tourism in the economy

Tourism in Brazil accounts directly for 3.1% of GDP, rising to 9.6% if indirect effects are also included. The sector supported 2.1 million jobs in 2018, which accounts for 2.5% of total employment.

In 2018, international tourist arrivals reached 6.6 million, a marginal increase of 0.5% from the previous year, and spent BRL 21.2 billion. Argentina, was the largest source market with 2.5 million tourists (37.7% of the total), followed by the United States (8.1%), Chile (5.9%), Paraguay (5.4%) and Uruguay (5.3%). The five primary source markets demonstrated varying levels of growth in 2018. Forecasts suggest consistent growth of over 2% per year during the period to 2023.

With over 206 million trips in 2015, the domestic market has high potential for growth. The majority of Brazilians choose domestic destinations for their holidays, including carnival and summer breaks. The main destinations are the Northeast, followed by the Southeast and South regions.

## Tourism governance and funding

The Ministry of Tourism was established in 2003 with a wide role that includes the cross-governmental co-ordination of tourism, planning and research, marketing and promotional activity, regulation, training and education, as well as the development of new products and related infrastructure.

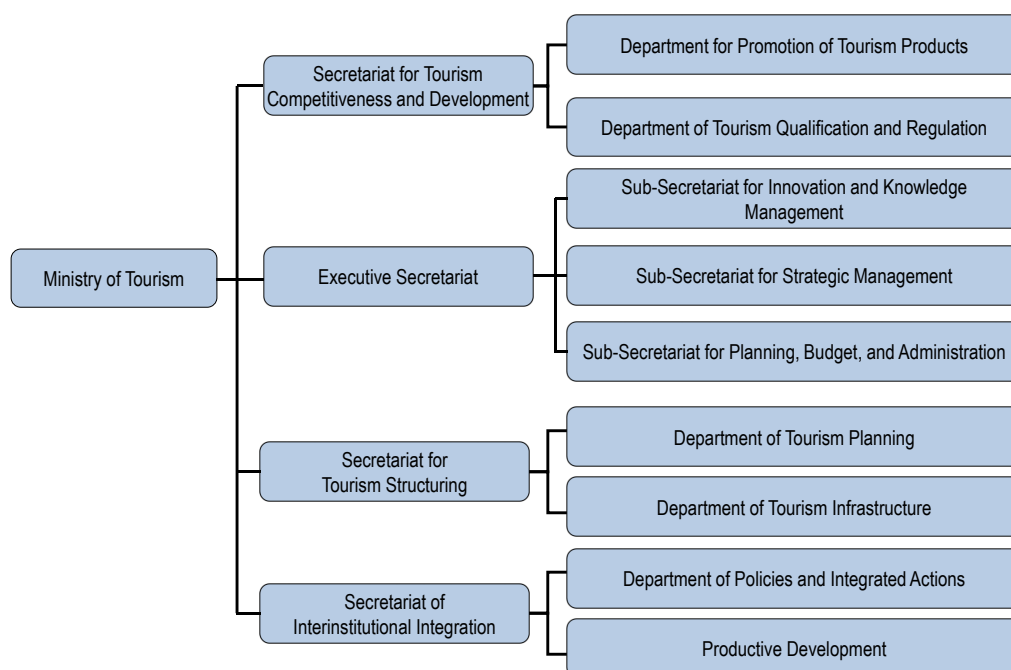
This Ministry oversees two national bodies, the National Council of Tourism, which is responsible for strategic direction and bringing together tourism interests, and the National Forum of State Secretaries and Directors of Tourism which is made up of a representative of state tourism boards. These legally independent regional bodies develop and market tourism in their regions.

## Tourism policies and programmes

In 2017, the Government approved the *National Tourism Plan 2018-2022* with the ambitious aims to increase annual international visitor arrivals from 6.6 million to 12 million, create 2 million jobs and encourage 40 million residents to travel domestically. Current challenges faced by the Ministry are the costs and regulatory burden on tourism businesses and the need to encourage regional development.

The Plan sets out a programme to strengthen regional tourism development and recognises the importance of quality improvement, innovation and sustainability. These combine to facilitate a responsible tourism that draws on local attributes such as crafts, culture and cuisine and encourages community development to be sustainable and inclusive. An example is the *Investe Turismo Programme* (see box).

## Brazil: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2020

The Plan has further developed the priorities set out in the *Brazil Plus Tourism Plan* launched in 2017 which aimed to improve product in key destinations and regions.

A range of measures to stimulate and deregulate the tourism sector is underway including:

- Improvements to accessing credit and the development of new finance mechanisms to assist all types of tourism development projects which has attracted 118 new proposals with a total value of BRL 4.3 billion,
- A visa waiver programme for tourists from Australia, Canada, Japan and the United States, as well as extensions to the length of visas for certain workers,
- A study amongst Mercosur partners to establish a mutual acceptance system, to permit entrance in all countries with a single visa,
- Improvements to air access with the approval of the Open Skies policy with the United States and authorisation for the entry of low-cost airlines into the domestic market,
- A new Argentina-Brazil airway policy consolidating around 200 flights per week connecting several destinations and increasing flight frequencies by up to 30%,
- Import tax exemptions for certain tourism products, such as theme parks, where specialist equipment cannot be sourced nationally. It is estimated this exemption will encourage tourism investment of BRL 1.9 billion and create 56 000 jobs over the next five years,
- A close partnership between the Ministry of Tourism and the Ministry of Education to drive up the volume of participants for vocational training to 193 000 people under the national programme,
- Action to raise awareness of the regulatory requirements of tourism service providers – this saw a 21% increase in the number of companies registered on the national system.

Marketing activity continues to be prioritised to ensure continued growth. A new focus is to attract international events. It is estimated this could have generated 12 000 new inbound visitors and have a

value of BRL 97 million during 2019. A major emphasis to attend international tourism fairs continues, an activity which is expected to underpin sales of USD 54.2 million over the next year.

A core priority of the Plan is the transformation of Embratur (the Brazilian Tourism Promotion Body – attached to the Ministry) into an Agency with a more flexible delivery structure. The related Federal Provisional Act was signed by Government in late November 2019 with Statutes published in December). This includes creating special tourism investment zones that can attract foreign investment, continue to improve regional connectivity, and stimulate more competition in the aviation sector.

Set out in recent law, Brazil has exempted visa requirements for residents of Australia, Canada, Japan and the United States, starting in June 2019. The four countries benefitting from the visa waiver were part of a previous pilot project that also enabled an electronic visa for anyone wishing to visit Brazil. The policy has resulted in a 35.2% increase in the number of visas issued to citizens of these markets, both e-visas and traditional, which represents significant potential foreign exchange income.

### Developing a network of Brazil's touring routes

The *Investe Turismo Programme*, in partnership with Embratur and Sebrae Nacional, (the Government agency which supports small business growth) aims to accelerate regional development, increase quality, boost competitiveness and generate jobs in tourism by developing 30 strategic tourist routes covering 158 municipalities across all of Brazil's states. A Tourism Heritage Management policy, using the creation of Special Areas of Tourist Interest to attract investment, is also part of the new programme. Partnership agreements have been signed with Brazil's neighbours regarding integrated itineraries and concessions for tourism service providers in national parks. Initial investment will amount to BRL 200 million.

Each route will receive a package of support covering four themes that aim to:

- Strengthen governance along each route with robust public / private sector partnerships,
- Improve and innovate existing tourism services and attractions, with a focus to support new micro / small tourism enterprises,
- Attract investment and support access to financial services for both existing and new enterprises together with potential investors, and
- Provide tourism marketing support to effectively target national and international markets.

The scale of this Programme is designed to be transformative of the way Brazil's positions itself as a tourism destination – both to Brazilians and to the wider world. The programme is designed to provide the framework to enable national investment in visitor attractions, provide strong products that can help reposition Brazil's image, and inform the development of a number of *Smart Tourism* destinations that respond to the demands of new customers using new technologies. Research will support the project and a set of indicators will be agreed to ensure that each route is developed in the most sustainable way possible.

## Statistical Profile

### Brazil: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 430	6 306	6 547	6 589	6 621
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Argentina	1 744	2 080	2 295	2 622	2 498
United States	657	576	570	475	539
Chile	337	306	312	342	387
Paraguay	294	302	317	337	357
Uruguay	224	267	284	328	348
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	9 617	9 478	8 872	10 610	10 733
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	2 264	2 228	1 725	1 912	2 209
Portugal	562	605	690	981	1 117
Argentina	1 082	963	1 084	1 247	947
Chile	408	456	439	545	589
Spain	441	456	373	468	559
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	7 404	6 254	6 613	6 175	6 320
International travel receipts	6 843	5 844	6 024	5 809	5 917
International passenger transport receipts	562	410	589	366	403
<b>Outbound tourism</b>					
Total international expenditure	29 998	20 356	17 068	22 991	22 227
International travel expenditure	25 567	17 357	14 497	19 002	18 263
International passenger transport expenditure	4 431	2 999	2 571	3 990	3 963

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078205>

## Brazil: Enterprises and employment in tourism

	Number of establishments	Number of persons employed <sup>1</sup>				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>252 616</b>	<b>2 046 469</b>	<b>2 079 450</b>	<b>2 129 506</b>	<b>2 128 041</b>	<b>2 133 822</b>
Accommodation services for visitors	29 569	341 700	346 472	318 523	312 628	315 481
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	184 089	1 083 971	1 124 364	1 201 038	1 216 988	1 233 881
Passenger transport	18 327	447 369	433 893	436 751	469 424	453 943
Air passenger transport	633	61 702	58 824	52 342	51 874	50 136
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	12 238	378 875	368 876	377 477	363 720	355 246
Water passenger transport	578	6 792	6 193	6 932	7 514	7 935
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	4 878	40 734	44 515	44 181	46 316	40 626
Travel agencies and other reservation services industry	11 908	96 871	92 745	91 322	91 370	90 968
Cultural industry	8 723	35 824	37 461	37 691	37 631	39 549
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of jobs.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078224>



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