

Brazil

Tourism in the economy and outlook for recovery

Tourism is an important pillar of Brazil's economy, providing 2.2 million direct jobs, accounting for 2.6% of the country's total employment in 2019.

International tourist arrivals reached 6.4 million in 2019, falling by 66.2% to 2.1 million in 2020. International receipts were USD 6.1 billion in 2019, before declining 49.4% in 2020. The top source market in 2020 remained Argentina, with 888 000 tourists (41.4% of international tourists), despite a decline of 54.6%. The other top markets for Brazil were the United States (8%), Chile (6.1%), Paraguay (5.7%) and Uruguay (5.3%).

Brazil recently began to measure domestic tourism. In 2020, Brazil recorded 9.6 million domestic overnight tourists, and an additional 3.7 million same-day visitors. This fell slightly in 2021, with domestic tourists falling 4.0% to 9.3 million and same-day visitors falling to 3.0 million.

Tourism governance and funding

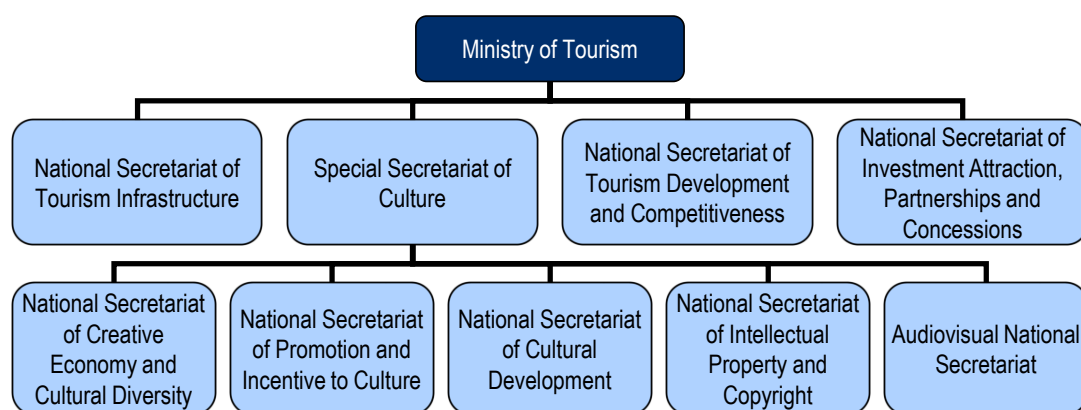
The Ministry of Tourism has a wide role that includes the cross-governmental co-ordination of tourism, planning and research, marketing and promotional activity, regulation, training and education, as well as the development of new products and related infrastructure.

In 2020, Brazil incorporated the 'culture' portfolio into the Ministry of Tourism, and also strengthened actions related to tourism development, competitiveness, infrastructure, and attracting investment. The new structure of the Ministry of Tourism now allows greater co-ordination between the various decision-making bodies and authorities in states and municipalities. Co-ordination with stakeholders and businesses in the sector happens through shared associations and informal organisations.

The Ministry of Tourism deals directly with authorities at regional, state and municipal levels through its policies, as well as through collegial bodies established within the structure of the Ministry or created by federal entities. The Federal Constitution defines the responsibilities of all the various authorities. The Tourism International Board (EMBRATUR) is a non-profit private organisation supervised by the Federal Government.

The 2021 budget for the Ministry of Tourism is approximately BRL 2.7 billion, down from BRL 3.5 billion in 2020. The decrease is due to the decline in tax revenues and the wider effects of the COVID-19 crisis on various economic sectors, including the need to create support mechanisms for businesses and individuals affected by the pandemic.

Brazil: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2022.

Tourism policies and programmes

The main challenge for the Brazilian government is resuming tourism activities that fell amid the COVID-19 pandemic. The Tourism Recovery Plan aims to establish a national alliance for the recovery of the sector (see box below). Several measures were adopted to provide safe travel. For example, the Responsible Tourism Stamp was granted to institutions which followed the sanitary protocols established by Brazil and the Brazilian Health Regulatory Agency (ANVISA).

During the most critical period of the pandemic, Brazil introduced emergency measures to protect companies and consumers. These actions resulted in three main laws aiming at the maintenance of jobs, the regulation of consumer laws to prevent mass bankruptcy, and a sector credit guarantee, which provided BRL 5 billion for companies to fund infrastructure works and working capital. In addition, over 100 free online training courses were offered to professionals in the sector, which benefited more than 3 000 workers in several segments. Courses included digital marketing, natural resources, and foreign language classes.

The Ministry's actions and policies are based on the National Tourism Plan 2018-22 and the Strategic Plan 2020-23. In consultation with the public and private sectors and civil society, the plan is currently being revised to adapt to the current context and the revised structure of the Ministry.

A lesson of the COVID-19 crisis was the need for reliable data to support managers in decision-making. The Ministry's Directorate of Strategic Management has made a wide range of tourism data available through the General Co-ordination of Data and Information, which was based on official data produced by the Ministry of Tourism, the Ministry of Labour, the Federal Police, and the Brazilian Institute of Geography and Statistics, as well as information provided by tourism private sector associations. Historically, the Ministry of Tourism has produced data on the sector made available to the government and private associations to support the decision-making and policy-designing process.

From this data, new evidence-based priority areas were set. The first was promoting domestic tourism through infrastructure improvements and advertising campaigns promoting domestic destinations. Domestic tourism has been identified as the driving force for tourism recovery and represents a tool for promoting the country to international tourists.

The second priority was to invest in reinforcing biosecurity protocols to increase travellers' sense of security. Brazil also aims to strengthen its understanding of domestic and international tourism demand

and profiles through an agreement with the Brazilian Institute of Geography and Statistics and international tourism surveys.

The Ministry of Tourism has strengthened partnerships with other Ministries to aid the implementation of projects, such as supporting inward investment for concessions for operators in national parks, in collaboration with the Ministry of the Environment. The Ministry has also sought to improve the relationship with the Ministry of Infrastructure to understand and improve tourist transport and mobility.

Tourism Recovery Plan in Brazil

Brazil launched the Tourism Recovery Plan to rebuild visitor confidence to resume the industry's activities. The plan aims to establish a national alliance for the recovery of the sector, bringing together public administration, the private sector, and the third sector. The plan has four axes of action: the implementation of biosafety protocols, promotion and incentive to travel, preservation of companies and jobs in the tourism sector, and improvement of the structure and qualification of tourist destinations.

The process was widely supported by the private sector, with the participation of more than 30 national associations from different touristic sectors.

To achieve its purpose, Brazil adopted four major measures to protect the sector:

- The Emergency Employment and Income Maintenance Program provided an allowance to preserve employment.
- Security for consumers through new legislation that covered both companies and tourists.
- Credit lines for the tourism sector.
- The establishment of biosafety protocols.

Tourism businesses committing to the biosafety protocols in order to protect tourists and workers obtain a Safe Tourism Stamp. Since the protocols were established, more than 30 000 Safe Tourism Stamps have been granted. Citizens can access the Ministry's website to verify the regularity of companies and which ones comply with biosafety protocols.

Finally, the Ministry analysed the trends in tourist behaviour to optimise efforts in the gradual and responsible return of tourist activities, aiming to support and catalyse the process.

Statistical Profile

Brazil: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	13 302	12 247
Overnight visitors (tourists)	..	..	..	9 637	9 256
Same-day visitors (excursionists)	..	..	..	3 665	2 991
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	6 589	6 621	6 353	2 146	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Argentina	2 622	2 498	1 955	888	..
United States	475	539	591	172	..
Chile	342	387	392	131	..
Paraguay	337	357	407	123	..
Uruguay	328	348	365	114	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	10 610	10 733	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	1 912	2 209	..	..	..
Portugal	981	1 117	..	..	..
Argentina	1 247	947	..	..	..
Chile	545	589	..	..	..
Spain	468	559	..	..	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	6 175	6 323	6 127	3 099	..
International travel receipts	5 809	5 921	5 995	3 044	..
International passenger transport receipts	366	403	132	55	..
Outbound tourism					
Total international expenditure	22 991	22 229	21 178	6 490	..
International travel expenditure	19 002	18 266	17 593	5 394	..
International passenger transport expenditure	3 990	3 963	3 585	1 096	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/pd478o>

Brazil: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed ²				
	2020	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	260 834	2 128 041	2 133 822	2 192 235	..	..
Accommodation services for visitors	30 721	312 628	315 481	318 114	..	..
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	189 286	1 216 988	1 233 881	1 271 932	..	..
Passenger transport	14 073	469 424	453 943	420 919	..	..
Air passenger transport	649	51 874	50 136	55 057	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	12 808	363 720	355 246	358 222	..	..
Water passenger transport	616	7 514	7 935	7 640	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	5 585	46 316	40 626	48 839	..	..
Travel agencies and other reservation services industry	12 437	91 370	90 968	92 865	..	..
Cultural industry	8 732	37 631	39 549	39 566	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

2. Data refer to number of jobs.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/jf3rwh>



From:
OECD Tourism Trends and Policies 2022

Access the complete publication at:
<https://doi.org/10.1787/a8dd3019-en>

Please cite this chapter as:

OECD (2022), “Brazil”, in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/4f874b69-en>

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