

INTELLIGENCE REPORT

# TOURISM INVESTMENT ATTRACTION

Volume 1  
1st quarter | 2021

MINISTÉRIO DO  
TURISMO



PÁTRIA AMADA  
**BRASIL**  
GOVERNO FEDERAL

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## PRESENTATION

The General Coordination of Investment Attraction (CGINV) is part of the Investment Attraction Department (DAINV) and of the National Secretariat for Investment Attraction, Partnerships and Concessions (SNAIC) of the Ministry of Tourism. Among its attributions are the formulation, implementation, monitoring and evaluation of plans, programs, projects and actions to attract national and international private investments to tourist destinations (municipalities, regions, routes and strategic tourist areas) as well as the identification and promotion of opportunities of structuring businesses in them.

One of CGINV's main competences is to identify obstacles in the tourism business environment and propose strategies and instruments for its extinction or mitigation, in addition to serving as an integrating and accelerating bridge in the structuring of tourist destinations and enterprises via private initiative. In this way, we seek to collaborate in the promotion of Brazil as a destination for investment and tourism business.

Therefore, the **Intelligence Report – Tourism Investment Attraction** is a quarterly publication to provide inputs to potential investors, both domestic and international, about the Brazilian tourism market. Thus, it is expected to provide more security with base information for entrepreneurs who want to launch new projects in the Brazilian tourist market. The publication will consist of two parts. The first with studies and analyses of the Brazilian tourism production chain. The second will consist of monitoring projects and indicators in the industry that are updated every quarter.

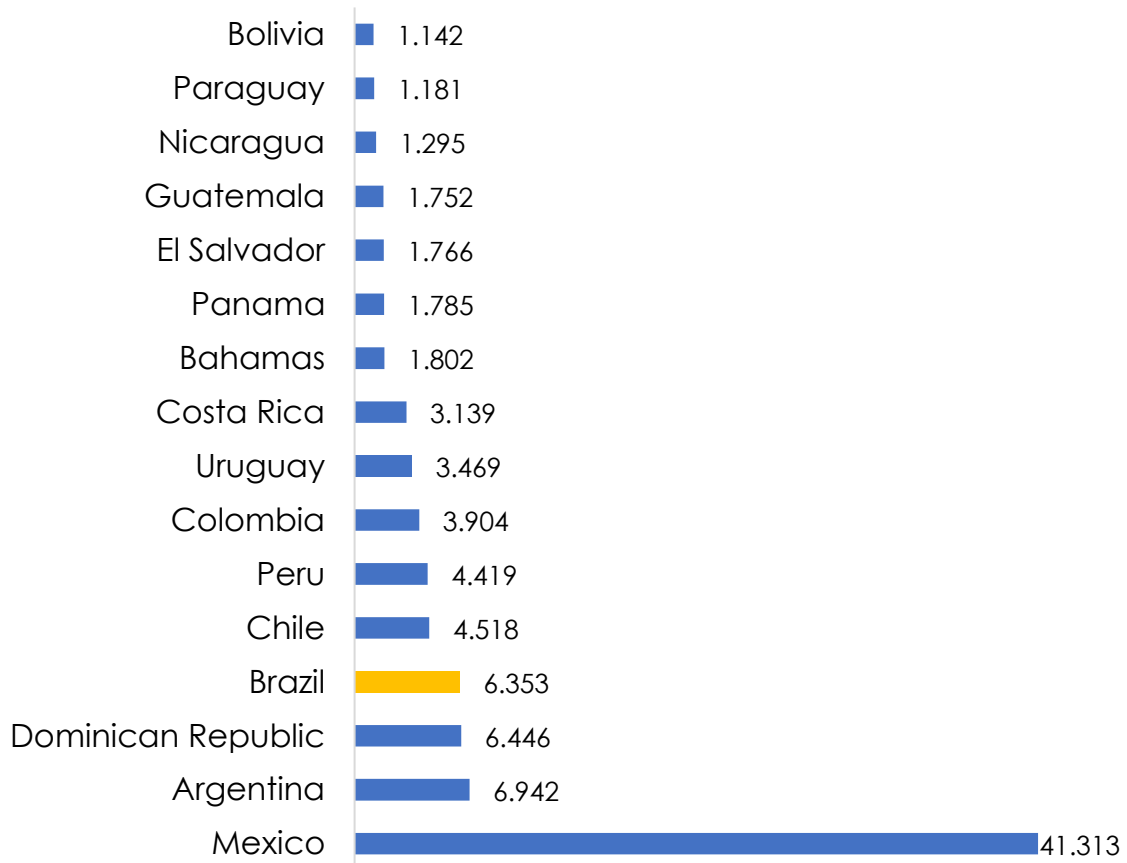
## DATA AND INDICATORS

### Business Environment

The term business environment seeks to express, in a qualitative way, the network of suppliers, distributors, competitors, workers and customers in a given industry. This section discusses data that characterize the business environment in Brazil and its relationship with Latin America. Therefore, information on competitiveness among selected countries, Foreign Direct Investment (FDI) in Tourism and the dimension of the national tourist market are presented.

In our initial outline, we understand that Latin America is part of destinations that have seen more than a million tourists staying overnight or at least more than 100,000 excursionists on cruises.

#### Comparative Latin America - 2019. Tourists (overnight) in thousands

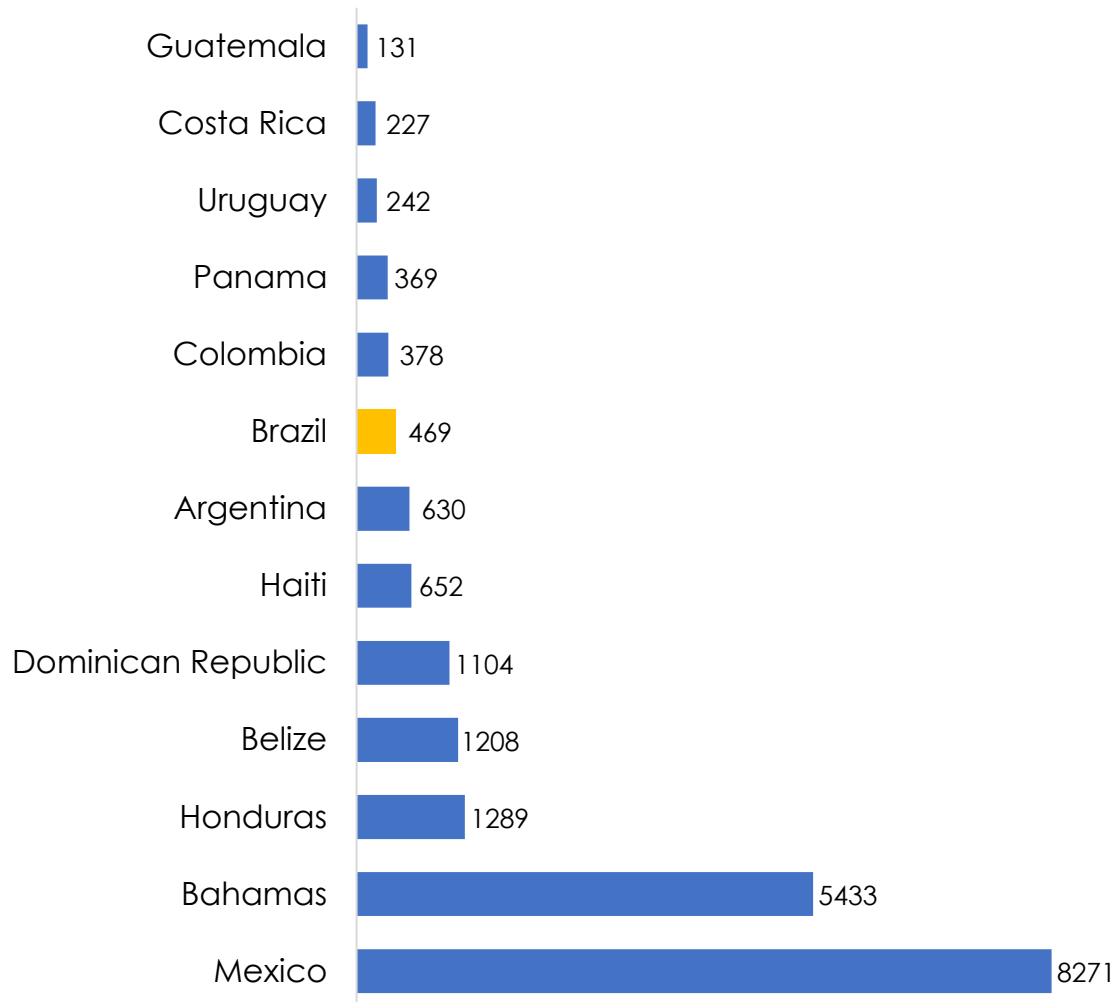


Data source: fDi Benchmark

## DATA AND INDICATORS

### Business Environment

#### Latin America - 2019. Ranking of cruise passengers in thousands of passengers



Data source: fDi Benchmark

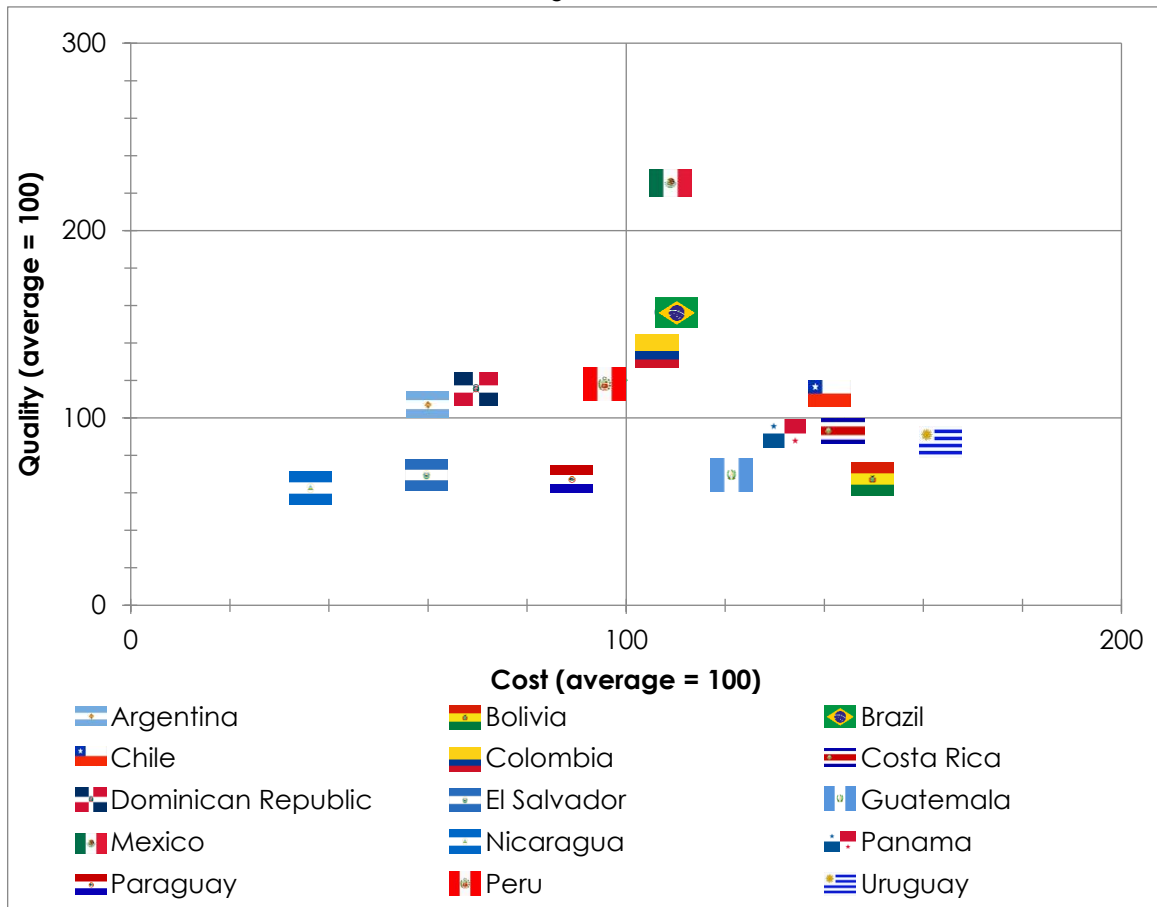
Brazil is, respectively, in fourth and eighth places in this initial cut. The repressed demand and still unexplored market can be understood as opportune as the federal government implements microeconomic reforms that aim precisely to reduce bureaucracy and simplify the rules in the business environment for entrepreneurs in the tourism industry.

## DATA AND INDICATORS

### Business Environment

#### Competitiveness of the business environment in Hospitality and Tourism - Brazil and Latin America

Mouse over countries' flags to view their names and scores



Data source: fDi Benchmark

It is possible to have a more accurate reading of the business environment, for the accommodations segment, by studying the data provided by the Financial Times (FDI) market intelligence division. Brazil is, in relation to 15 locations in Latin America, in 2nd place in the quality ranking, 41.28% above the average (with a score of 141.28) and 9th in costs (US\$510,495.00), 2% more expensive than the group average of \$500,640.00. By equating the group's weighted average to 100, based on a parity ratio in the Cost/Quality ratio, with a weight of 50% for each, it is observed that the country is in 5th place in the general ranking of the study. The cost scale considers those that are primary operational for the operation of a reference model of accommodation (with 50 employees and 60 HU). Quality, on the other hand, identifies the locational factors that determine the project.

How to read the infographic? From the distance of the average 100 (for Cost and Quality). From the distance expressed by each country, it is

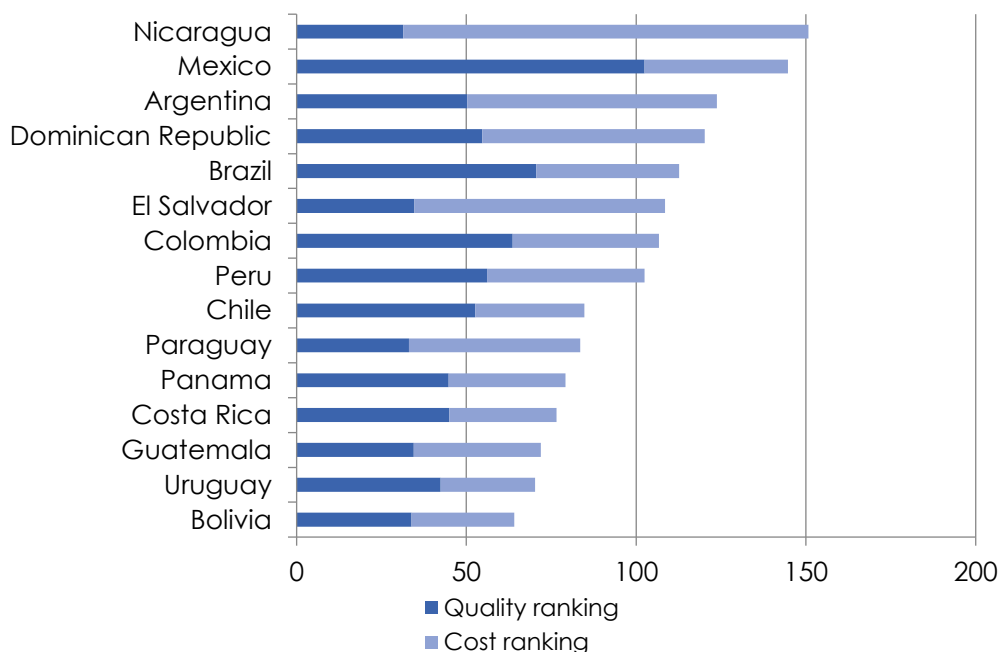
## DATA AND INDICATORS

### Business Environment

possible to understand, for the accommodations segment, which specialty is revealed by the business environment of each competitor.

For example, the upper-right quadrant will point to above-average cost and quality specialization. In this select group we find, in respective order, Mexico, Brazil and Chile.

The lower right quadrant (with high cost and low quality) points to an incipient specialization in mass tourism that fails to offer a quality that is proportional or superior to the prevailing cost structure in the business environment, which is the case of Guatemala, Costa Rica, Uruguay, Bolivia and Panama. In the lower left quadrant, we have the combination of low cost and quality, with Paraguay, El Salvador and Nicaragua within this grouping. Finally, the upper left quadrant equates high quality with better cost. In this competitive group, Argentina, Dominican Republic, Peru and Colombia are identified, respectively, from the least to the best positioned. Two caveats are required. The 50/50% parity ratio is tricky because it does not appear in reality, being just a method that allows us to better identify the direction that the business environment expresses.



*Data source: fDi Benchmark*

For example, the reading of the attractiveness index provided by the FDI, Nicaragua emerges as the most competitive market, from the point of view of the investor of the aforementioned reference enterprise



## **DATA AND INDICATORS**

### **Business Environment**

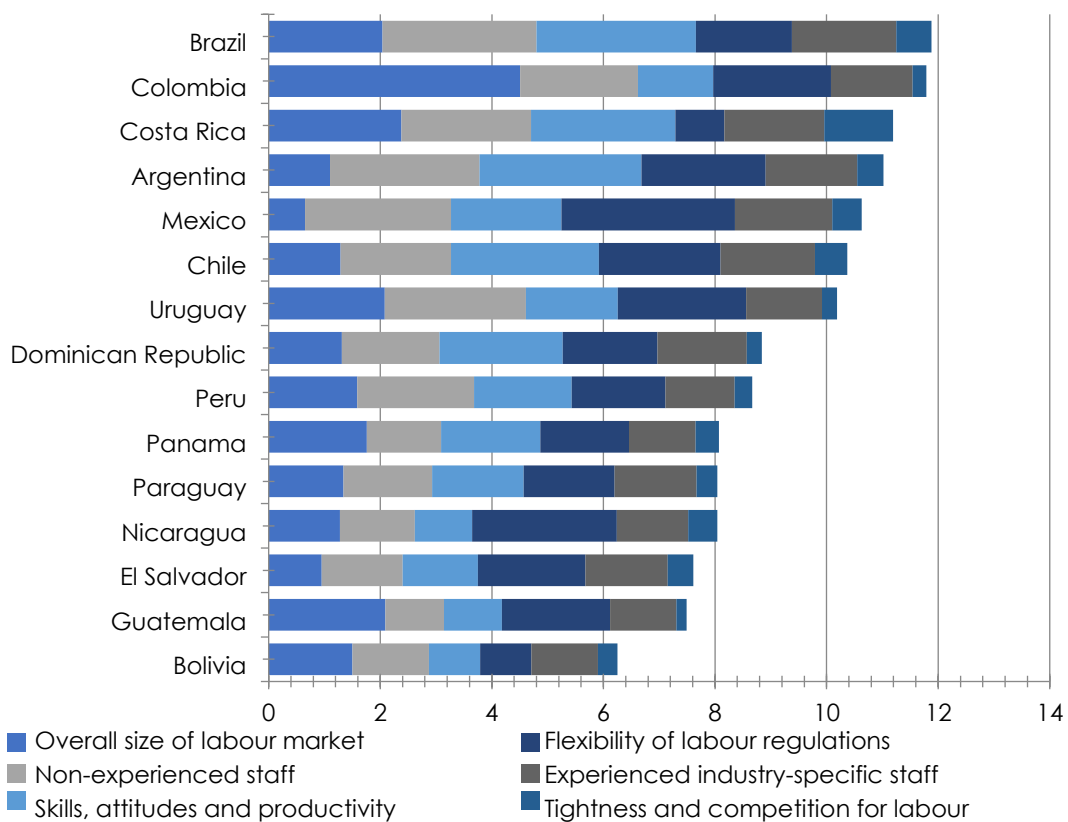
in the accommodation segment. With implementation costs at US\$179,606.00 (2020) and qualitative weight at an equitable 50%, the Mexican (US\$507,001.00) or Brazilian (US\$510,495.00) market stand out as less attractive. However, analysing it in a more sensitive way, it can be seen that both Mexico and Brazil emerge as markets centred on a better qualitative offer, which attracts more qualified entrepreneurs. In terms of market size and potential, therefore, Chile, Mexico and Brazil are immediate competitors. The Argentine market, in light of recent developments, presents a less favourable business environment that is not expressed in this quantitative metric.

## DATA AND INDICATORS

### Business Environment

#### Labour Availability and Quality

Brazil is in 1st place in the ranking of Labour Availability and Quality, an important consideration in the reference premises used in the study, meaning that, to the investor, its workforce is skilled enough to carry out projects. Its best position is in the Overall size of labour market (1st), also showing strength in Tightness and competition for labour (2nd) and Experienced industry-specific staff (4th). Brazil's score is 53% higher than the Latin American average (10).



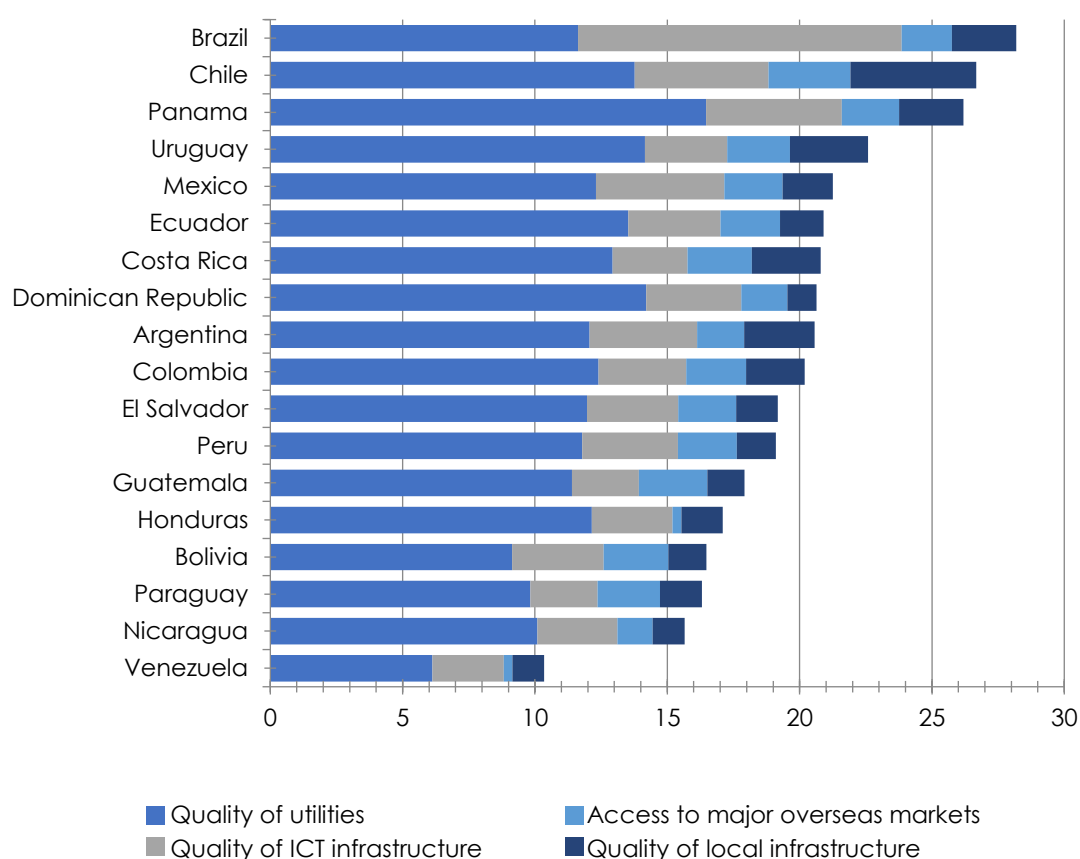
*Data source: fDi Benchmark*

## DATA AND INDICATORS

### Business Environment

#### Infrastructure and Accessibility

Brazil ranks 1st in Infrastructure and Accessibility, with a total score of 28.19. The country has its best performance in the Quality of local infrastructure (1st place) and is relatively strong in the Quality of ICT infrastructure (5th place). Brazil's score is 41% higher than the average (20 points).



*Data source: fDi Benchmark*

Overall, what are the strengths of the Brazilian business environment? The quality of the capital market and credit information, the cost of starting a business, the size of the potential domestic tourism market, the extent and relative quality of the infrastructure for accessibility and mobility, the number of companies in accommodations and the labour force participation rate.

What are the opportunities? The low concentration and market dominance for the segment, the relative flexibility vis-à-vis Latin American peers in hiring labour and negotiating working hours.

## DATA AND INDICATORS

### Business Environment

#### Sizing of the Brazilian tourism market

The General Coordination of Regulation and Inspection of the Ministry of Tourism is responsible for registering and inspecting tourism companies and professionals in the Registry of Tourist Service Providers of the Ministry of Tourism (Cadastur). The disclosure of registration data occurs quarterly in the [Open Data section of the MTur portal](#)<sup>1</sup>.

The unusual nature of the increase in registered enterprises is directly correlated with access to emergency funds made available by the General Tourism Fund (Fungetur) last year. Its indicator, therefore, is approximate.

Activity	Number of service providers	
	4th quarter/ 2019	4th quarter/ 2020
Tour guide*	23.871	24.308
Tourist camp*	184	315
Travel agencies*	30.652	33.390
Accommodations*	14.330	16.584
Theme parks*	71	182
Tourist Carrier*	14.070	14.638
Venues and Tourist Entertainment Equipment	162	375
Convention Center	113	214
Enterprise to Support Nautical Tourism or Sport Fishing	148	260
Entertainment and Leisure Enterprises and Water Parks	148	377
Car rental	1.340	1.771
Events organizer*	4.581	6.680
Event Support Infrastructure Service Provider	1.859	3.460
Specialized Provider in Tourism Segments	3.157	5.193
Restaurants, Cafes and Bars	5.493	11.608
*Mandatory registration		

*Data source: CGRF/MTur*

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<sup>1</sup> The registration is mandatory to Tour guides, Tourist camps, Travel agencies, Accommodation means, Theme parks, Tourist carriers and Event organizers. Therefore, it must be noted that the number of enterprises may be considerably bigger than reported.

## DATA AND INDICATORS

### Business Environment

#### Foreign Direct Investment (FDI) in Tourism

The IED is a complementary reading to the SWOT analysis of the Brazilian business environment. Its performance sheds light on the small maturity of the potential market reserve that Brazil is currently emerging from, particularly bearing in mind the global liquidity employed in investment funds aimed at the real estate market with a tourism focus. To get an idea of the liquidity potential, a study of the 99 largest pension funds (public and private) carried out by the OECD found that out of a US\$9 trillion total in assets, only US\$120.8 billion were dedicated to investments in infrastructure (infrastructure funds, equity funds and direct investments in projects)<sup>2</sup>. There is a promising market in Infrastructure Investment Trusts (IIT), a vehicle for structuring projects in the capital market, capable of channelling resources to different types of investment. There is a long line for efficient and sustainable buildings, with investment potential, according to an IFC study<sup>3</sup>, of approximately US\$ 1.5 trillion by 2030. Alternatively, around 370 institutional investors, responsible for a portfolio of US\$ 35 trillion, are more willing to invest in efficient buildings (green buildings). The emerging market for this segment could reach \$24.7bn, Latin America in particular could raise \$54.2bn specifically for efficient hotels and restaurants by 2030<sup>4</sup>.

#### **Summary of FDI in the hotel and tourism sector in Brazil between January 2016 and January 2021:**

Number of projects	24
Jobs created	5,938
Average jobs created	247
Investment capital	US\$ 1.050,80 mi
Average investment capital	US\$ 43,80 mi

*Data source: fDi Markets*

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<sup>2</sup>OECD (2019), Annual Survey of Large Pension Funds and Public Pension Reserve Funds. Available at: <https://www.oecd.org/finance/survey-large-pension-funds.htm>.

<sup>3</sup>IFC (2020) Business Case for Sustainable Hotels. Available at: <https://sustainablehospitalityalliance.org/>

<sup>4</sup>IFC (2019), Green Buildings: A Finance and Policy Blueprint for Emerging Markets. Available at: [59988-IFC-GreenBuildings-report\\_FINAL\\_1-30-20.pdf](https://www.ifc.org/content/dam/ifc/docs/2019/05/59988-IFC-GreenBuildings-report_FINAL_1-30-20.pdf)

## DATA AND INDICATORS

### Business Environment

The projects peak occurred in 2018, when the country received 13 projects (54.2% of the total) that created 4,171 jobs and received US\$ 745.6 million in investments. These values are, respectively, 70.2% and 71% of the total for the last 5 years. In terms of direct jobs generated, such investments did not even represent 0.56% of the formal work portfolios present in December 2019.

The largest projects originated from Panama, with an average investment of US\$74.2 million. This value is 1.5x higher than the average of the others. The country is also second in number of projects (4), having created 1,648 jobs and a total investment value of US\$296.8 million.

Rio de Janeiro received almost 2/5 of the projects. The investment of US\$ 448.8 million generated 2,523 jobs. It should be considered that the city hosted the Rio 2016 Olympic Games, a fact that may have favoured it in this temporal window.

#### Tourism FDI – 2016 to 2019

Year	Number of projects	% of annual growth	Jobs created		Investment capital	
			Total	Average	Total (US\$ million)	Average (US\$ million)
2019	3	-76,92%	446	148	76,6	25,5
2018	13	1300%	4.171	320	745,6	57,4
2017	1	-85,71%	17	17	1,2	1,2
2016	7	n/a	1.304	186	227,4	32,5
<b>Total</b>	<b>24</b>		<b>5.938</b>	<b>247</b>	<b>1.050,80</b>	<b>43,8</b>

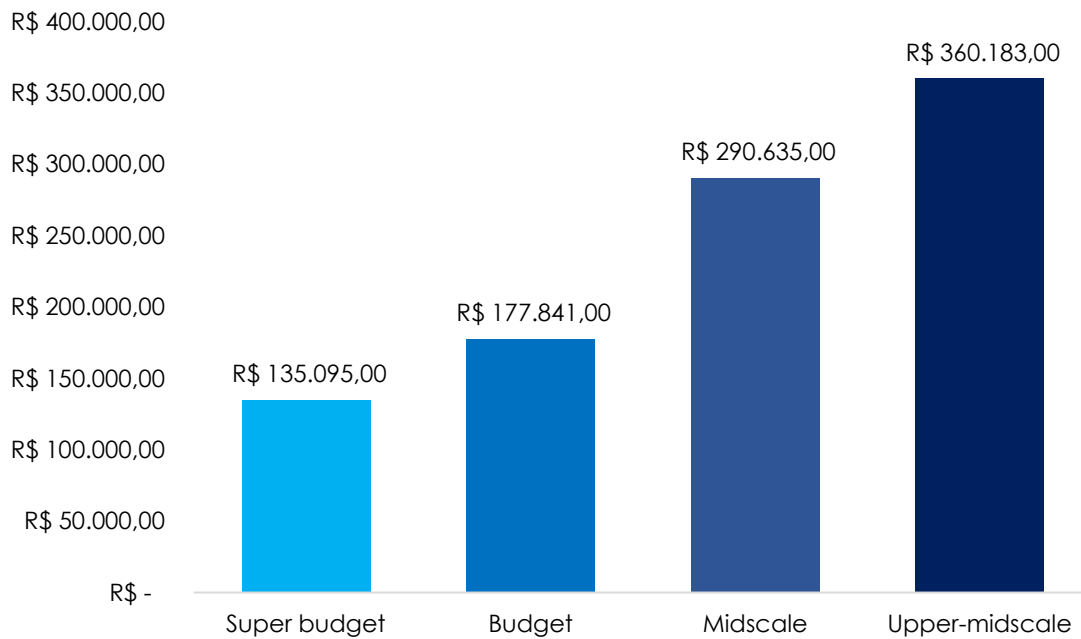
Data source: fDi Markets

Considering the average PTAX exchange rate in 2020 (R\$ 5.1527) and the benchmark of US\$ 510,495.00 of the FDI previously seen, it is possible to compose this information with the latest data from the consulting firm Hollinvest, which considered, for 2019, the average investment per housing unit (HU) with land according to the segments expressed in the figure below.

## DATA AND INDICATORS

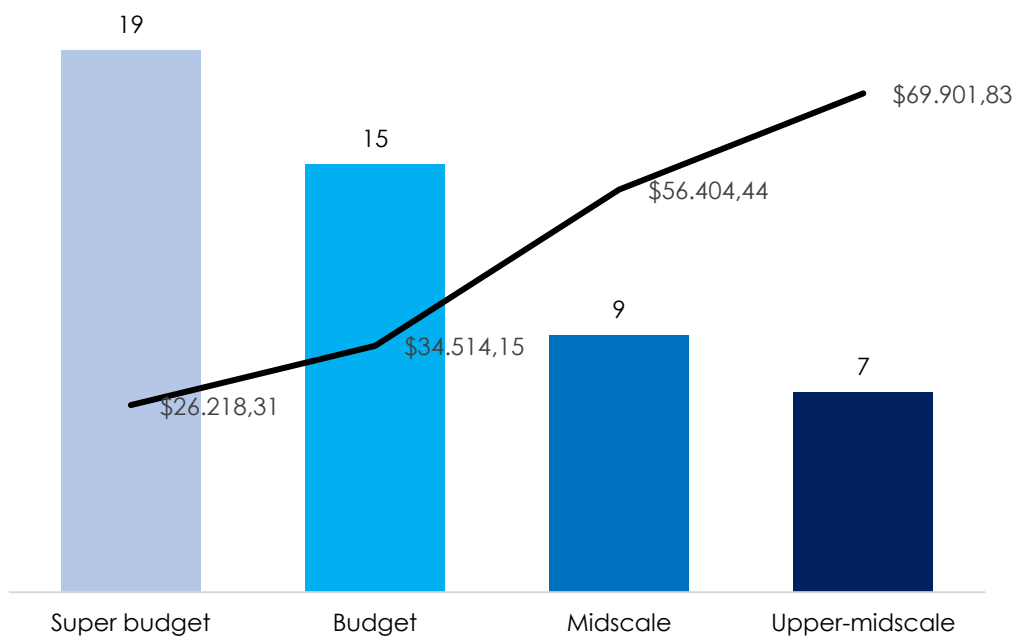
### Business Environment

#### Average investment per HU with land, 2019



In dollars, it is possible to estimate to foreign investors the approximate average cost per HU, with land, and total for the reference project of 60 HU and 50 employees below.

#### Average investment per plant with land, in US\$ (2020)

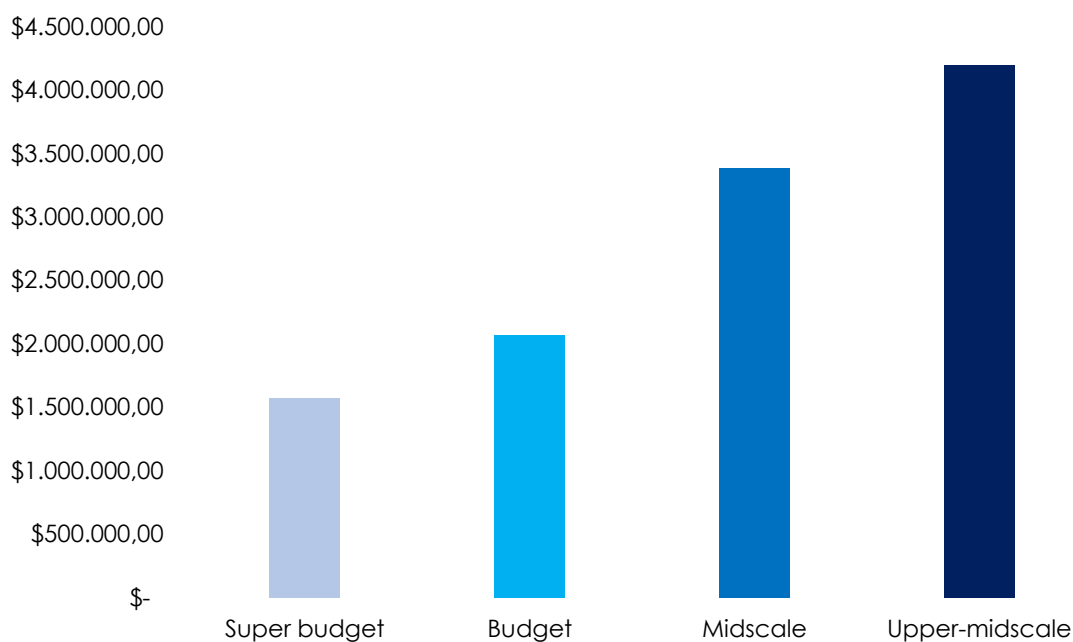


## DATA AND INDICATORS

### Business Environment

This metric is important for comparison with other peers. In this cut there is a range for investors, from 19 HU to 7. Below, we have an approximate potential universe of expenses expressed by the sector, ranging from US\$ 1.5 million to US\$ 4.2 million with the exchange average expressed in 2020.

#### Average investment (60 HU) total in US\$ (2020)



A total of 17 companies invested in the country. The 10 companies that had the most projects represent 70.8% of the total. In the last 12 months, three of them announced new projects.

#### Top 10 companies by number of projects

Company	County	Number of projects	Projects in the last 12 months
Selina	Panama	4	4
TBO Holidays	UAE	2	0
AC Hotels	Spain	2	0
Room Mate Hotels	Spain	2	0
Inspire	United Kingdom	2	0
Intrepid Group	Australia	1	1
Duty Free Americas	USA	1	1
Dayuse.com	France	1	0
Accor	France	1	0
Abercrombie & Kent	USA	1	0

Data source: fDi Markets



## DATA AND INDICATORS

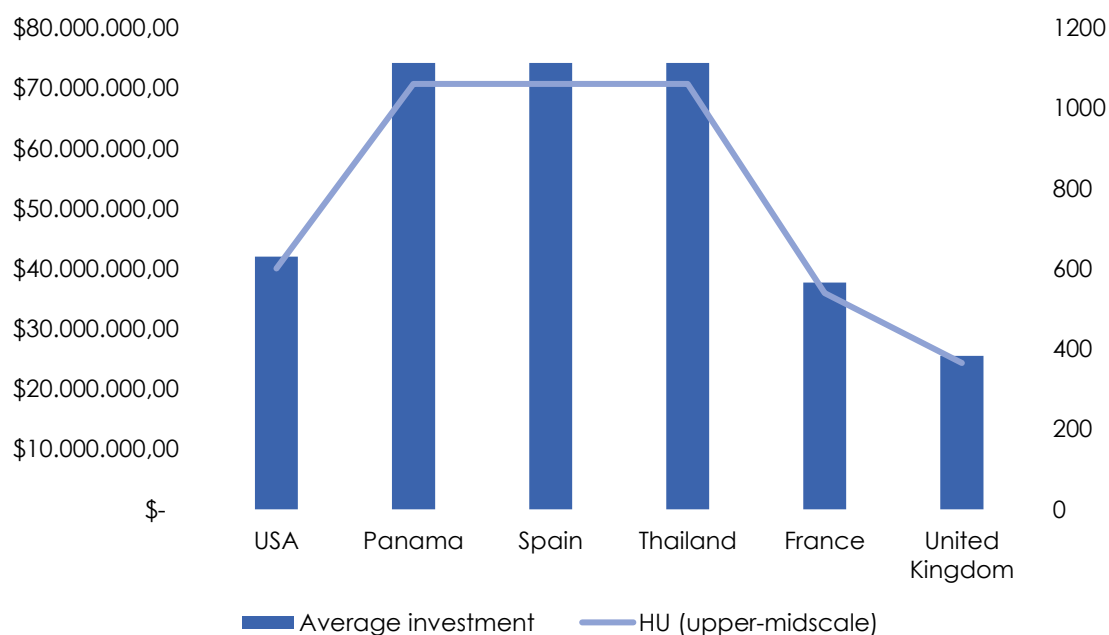
### Business Environment

#### Countries that invest the most in the hotel and tourism sector in Brazil

Country	Number of projects	Number of enterprises	Jobs created		Investment capital (US\$ million)	
			Total	Average	Total	Average
USA	7	6	1.699	242	300,40	42,90
Panama	4	1	1.648	412	296,80	74,20
United Kingdom	3	2	446	148	76,60	25,50
France	2	2	429	214	75,40	37,70
Spain	2	1	824	412	148,40	74,20
Thailand	2	2	824	412	148,40	74,20
UAE	2	1	34	17	2,40	1,20
Australia	1	1	17	17	1,20	1,20
Japan	1	1	17	17	1,20	1,20
<b>Total</b>	<b>24</b>	<b>17</b>	<b>5.938</b>	<b>247</b>	<b>1.050,80</b>	<b>43,80</b>

Data source: fDi Markets

#### Estimated increase in supply - 2016 to 2021



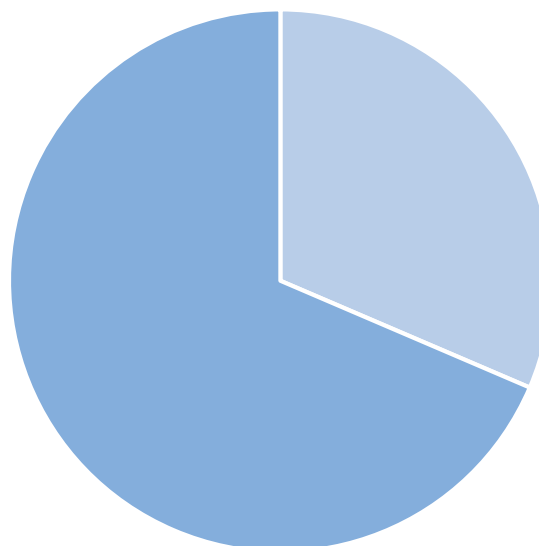
This data is important as it represents only 1.89% of the number of rooms registered in 2019 (246,923) for hotels and flats with international and national flags and with independent administration, all projects with more than 20 rooms.

## DATA AND INDICATORS

### Business Environment

In other words, the 50 largest hotel operators in the country had a dominance of HU supply, in 2019, of approximately 31.44%. The simulated estimate above represents only 2.68% of the installed capacity.

#### Market concentration in HU (2019)



■ Top 50 ■ Rest of the market

Out of the eight cities that received investments, there is still a preference for traditional destinations: São Paulo and Rio de Janeiro.

#### Number of projects per city

City	Projects		Companies		Jobs created	Investment capital (US\$ million)
	#	%	#	%		
Rio de Janeiro	9	37,50	8	47,06	2.523	448,80
São Paulo	5	20,83	5	29,41	875	152,00
Brasília	1	4,17	1	5,88	17	1,20
Florianópolis	1	4,17	1	5,88	412	74,20
Paraty	1	4,17	1	5,88	412	74,20
Salvador	1	4,17	1	5,88	17	1,20
São José do Rio Preto	1	4,17	1	5,88	412	74,20
Vitória	1	4,17	1	5,88	17	1,20
Others	4	16,67	4	23,53	1.253	223,80
<b>Total</b>	<b>24</b>	<b>100,00</b>	<b>17</b>	<b>100,00</b>	<b>5.938</b>	<b>1.050,80</b>

Data source: fDi Markets

## DATA AND INDICATORS

### Economy

This section addresses economic data related to tourism. For this purpose, the federal collection of taxes that focus on the Characteristic Tourism Activities - ACT will be presented. For this, the activities of the National Classification of Economic Activities - CNAE were selected for land transport, water transport, air transport, accommodation, food and beverages, travel agencies, tour operators and reservation services and sports & recreation and leisure activities.

### 2019 Federal tax collection

Access the document detailed by type of tax collected [here](#) (in PT-BR).

Activity	Total
Land transport*	R\$ 17.175.882.480,00
Water transport	R\$ 1.484.389.862,00
Air transport	R\$ 2.460.534.525,00
Accommodation	R\$ 3.078.678.922,00
Food and beverages	R\$ 9.298.547.847,00
Travel agencies, tour operators and reservation services	R\$ 2.066.280.365,00
Sports & recreation and leisure activities	R\$ 2.118.481.747,00
<b>Total</b>	<b>R\$ 37.682.795.748,00</b>

\* It shall be taken into account that this value includes the transport of passengers and cargo, the latter being mostly through highways in Brazil.

Data source: Receita Federal do Brasil

### Federal tax collection July to August/ 2020

Activity	Total
Land transport*	R\$ 10.449.128.764,23
Water transport	R\$ 1.030.907.765,42
Air transport	R\$ 1.298.710.659,81
Accommodation	R\$ 1.249.103.774,00
Food and beverages	R\$ 3.793.264.226,93
Travel agencies, tour operators and reservation services	R\$ 827.952.970,00
Sports & recreation and leisure activities	R\$ 2.716.229.974,00
<b>Total</b>	<b>R\$ 21.365.298.134,39</b>

\* It shall be considered that this value includes the transport of passengers and cargo, the latter being mostly through highways in Brazil.

Data source: Receita Federal do Brasil

## DATA AND INDICATORS

### Employability

This section presents data referring to the number of people formally and informally employed by Tourism Characteristic Activity (ACT), as well as the average salary per ACT and by Federation Unit (UF). All data come from the General Data and Information Coordination (CGDI) of the Ministry of Tourism. In this case, the ACT are: accommodation, food and beverages, land transport, water transport, air transport, car rental, travel agency and culture and leisure.

#### Employment by characteristic tourism activity

<b>Accommodation</b>	336.663
<b>Food and beverages</b>	1.314.836
<b>Land transport</b>	192.971
<b>Water transport</b>	8.174
<b>Air transport</b>	63.657
<b>Car rental</b>	59.159
<b>Travel agency</b>	67.728
<b>Culture and leisure</b>	61.104

Data source: CGDI/MTur

#### Employment by region and Federation Unit

	Total		Total
<b>North</b>	77.643	<b>Midwest</b>	174.631
Acre	2.981	Distrito Federal	54.981
Amapá	2.844	Goiás	64.406
Amazonas	19.155	Mato Grosso	30.304
Pará	29.050	Mato Grosso do Sul	24.940
Rondônia	11.476	<b>Southeast</b>	1.143.719
Roraima	3.483	Espírito Santo	38.114
Tocantins	8.654	Minas Gerais	214.444
<b>North East</b>	361.287	Rio de Janeiro	244.088
Alagoas	24.688	São Paulo	647.073
Bahia	106.273	<b>South</b>	347.012
Ceará	60.863	Paraná	130.420
Maranhão	19.569	Rio Grande do Sul	119.223
Paraíba	20.630	Santa Catarina	97.369
Pernambuco	69.429		
Piauí	17.097		
Rio Grande do Norte	26.924		
Sergipe	15.814		

Data source: CGDI/MTur

## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### Average salary per Tourism Characteristic Activity

Two data will be presented: The fluctuation of the average salary by UF and the highest and lowest salaries by ACT. The spreadsheet with information about all Federation Units and ACTs in Excel can be accessed [here](#) (in PT-BR).

UFs with higher percentages of salary growth					
UF	2017	2018	2019	Fluctuation	%
Santa Catarina	R\$ 1.752,81	R\$ 1.869,90	R\$ 1.879,35	R\$ 126,55	7,22
Ceará	R\$ 1.328,97	R\$ 1.410,62	R\$ 1.403,74	R\$ 74,78	5,63
Espirito Santo	R\$ 1.417,22	R\$ 1.446,76	R\$ 1.474,89	R\$ 57,66	4,07
UFs with lower percentages of salary growth					
Roraima	R\$ 1.386,57	R\$ 1.385,40	R\$ 1.294,78	-R\$ 91,79	- 6,62
Paraíba	R\$ 1.282,55	R\$ 1.328,26	R\$ 1.215,73	-R\$ 66,82	- 5,21
Mato Grosso	R\$ 1.551,72	R\$ 1.587,06	R\$ 1.492,34	-R\$ 59,38	- 3,83

Data source: CGDI/MTur

The Federation Units with the highest and lowest remuneration are presented below, highlighting the salary fluctuation in the reported years. It is noted that São Paulo is the state with the highest average remuneration in the country and also with the highest remuneration in 6 of the 8 typical tourism activities, while Piauí, Roraima and Sergipe appear twice each in the worst remuneration position.

UFs with higher and lower average salary per ACT						
ACT	UF	2017	2018	2019	Fluctuation over the last 3 years	%
Travel agencies	São Paulo ↑	R\$ 3.544,39	R\$ 3.690,91	R\$ 3.735,60	R\$ 191,22	5,39
	Piauí ↓	R\$ 1.269,33	R\$ 1.328,91	R\$ 1.241,72	-R\$ 27,61	-2,18
Food and beverages	São Paulo ↑	R\$ 1.667,54	R\$ 1.756,44	R\$ 1.729,65	R\$ 62,11	3,72
	Piauí ↓	R\$ 1.141,60	R\$ 1.140,64	R\$ 1.129,60	-R\$ 12,00	-1,05
Accommodation	São Paulo ↑	R\$ 2.013,39	R\$ 2.115,92	R\$ 2.070,77	R\$ 57,38	2,85
	Roraima ↓	R\$ 1.261,89	R\$ 1.272,99	R\$ 1.030,33	-R\$ 231,56	- 18,35
Car rental	São Paulo ↑	R\$ 2.137,62	R\$ 2.843,40	R\$ 2.690,58	R\$ 552,96	25,87
	Sergipe ↓	R\$ 1.455,11	R\$ 1.726,28	R\$ 1.115,32	-R\$ 339,79	-23,35
Culture & leisure	Rio de Janeiro ↑	R\$ 2.893,88	R\$ 2.965,19	R\$ 2.733,64	-R\$ 160,25	- 5,54
	Maranhão ↓	R\$ 1.200,41	R\$ 1.199,86	R\$ 1.219,03	R\$ 18,62	1,55
Air transport	São Paulo ↑	R\$ 7.616,84	R\$ 8.169,00	R\$ 7.367,20	-R\$ 249,64	-3,28
	Sergipe ↓	R\$ 3.141,48	R\$ 3.357,91	R\$ 2.482,57	-R\$ 658,92	-20,97
Water transport	Roraima ↑	R\$ 2.396,56	R\$ 7.528,34	R\$ 7.721,84	R\$ 5.325,28	222,20
	Acre ↓	R\$ 974,50	R\$ 1.045,75	R\$ 1.060,86	R\$ 86,36	8,86
Land transport	São Paulo ↑	R\$ 2.330,28	R\$ 2.366,02	R\$ 2.294,71	-R\$ 35,57	-1,53
	Roraima ↓	R\$ 1.571,06	R\$ 1.589,53	R\$ 1.046,46	-R\$ 524,60	-33,39

Data source: CGDI/MTur

## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### International tourist arrivals by origin and mode of transport

The largest source of tourists to Brazil is Argentina, which in 2019 sent 3,597,179 tourists to Brazil, with 53% of them accessing the country by air and 42.4% by land. Separating by continent and transport modal, the main emitters are:

- Africa: South Africa, 24,869 tourists, 92,8% by air;
- Central America and Caribbean: Costa Rica, 11,676 tourists, 83,54% by air;
- North America: United States of America, 590,520 tourists, 92% by air;
- Europe: France, 257,504 tourists, 75,31% by air;
- Oceania: Australia, 56,158 tourists, 80,17% by air;
- Asia: Japan, 78,914 tourists, 92,09% by air.

For detailed data about every country and Federation Unit, [click here \(in PT-BR\)](#).

Tourist arrivals by access route - 2019					
	Total	Air	Land	Sea	River
Africa	69.436	67.018	1.788	583	47
Central America and Caribbean	43.896	38.752	4.846	267	31
North America	7 50.484	6 80.593	49.929	15.147	4.815
South America	3.597.179	1.911.509	1.525.036	77.614	83.020
Asia	290.974	250.088	38.186	2.560	140
Europe	1.531.275	1.284.785	207.343	25.470	13.677
Oceania	69.861	55.750	12.320	1.486	305

*Data source: Departamento de Polícia Federal and Ministério do Turismo*

## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### Domestic passenger flow - Air transport

Regions and UFs	National passenger flow 2019					
	Air Transport					
	Passenger boardings			Passenger landings		
	Total	Type of flight		Total	Type of flight	
Regular		Not regular	Regular		Not Regular	
<b>North</b>	<b>5.306.305</b>	<b>5.085.432</b>	<b>220.873</b>	<b>5.149.113</b>	<b>4.916.659</b>	<b>232.454</b>
Acre	202.625	200.510	2.115	209.551	202.180	7.371
Amapá	307.151	296.530	10.621	301.129	290.713	10.416
Amazonas	1.591.828	1.478.044	113.784	1.518.146	1.384.186	133.960
Pará	2.249.462	2.179.452	70.010	2.202.989	2.132.930	70.059
Rondônia	454.912	450.386	4.526	459.124	454.370	4.754
Roraima	191.990	187.073	4.917	154.350	152.170	2.180
Tocantins	308.337	293.437	14.900	303.824	300.110	3.714
<b>North East</b>	<b>17.857.073</b>	<b>16.810.344</b>	<b>1.046.729</b>	<b>17.783.312</b>	<b>16.763.165</b>	<b>1.020.147</b>
Alagoas	1.058.546	950.447	108.099	1.058.008	957.555	100.453
Bahia	4.783.665	4.323.504	460.161	4.770.802	4.311.608	459.194
Ceará	3.568.059	3.400.247	167.812	3.545.098	3.398.193	146.905
Maranhão	980.679	954.768	25.911	960.303	935.387	24.916
Paraíba	742.814	709.700	33.114	736.820	704.056	32.764
Pernambuco	4.441.593	4.300.886	140.707	4.461.782	4.318.438	143.344
Piauí	589.248	564.154	25.094	586.066	560.769	25.297
Rio Grande do Norte	1.121.343	1.067.515	53.828	1.108.631	1.053.257	55.374
Sergipe	571.126	539.123	32.003	555.802	523.902	31.900
<b>Midwest</b>	<b>12.202.005</b>	<b>11.911.104</b>	<b>290.901</b>	<b>12.164.300</b>	<b>11.868.446</b>	<b>295.854</b>
Distrito Federal	8.103.108	7.957.033	146.075	8.105.364	7.956.624	148.740
Goiás	1.674.517	1.603.174	71.343	1.657.049	1.585.598	71.451
Mato Grosso	1.590.636	1.532.657	57.979	1.569.988	1.510.259	59.729
Mato Grosso do Sul	833.744	818.240	15.504	831.899	815.965	15.934
<b>Southeast</b>	<b>48.520.208</b>	<b>47.195.556</b>	<b>1.324.652</b>	<b>48.741.953</b>	<b>47.412.252</b>	<b>1.329.701</b>
Espírito Santo	1.651.902	1.616.167	35.735	1.637.389	1.599.455	37.934
Minas Gerais	6.143.125	5.866.442	276.683	6.155.880	5.893.184	262.696
Rio de Janeiro	9.366.942	9.083.313	283.629	9.374.173	9.118.251	255.922
São Paulo	31.358.239	30.629.634	728.605	31.574.511	30.801.362	773.149
<b>South</b>	<b>12.734.098</b>	<b>12.361.378</b>	<b>372.720</b>	<b>12.781.011</b>	<b>12.403.292</b>	<b>377.719</b>
Paraná	5.316.999	5.144.875	172.124	5.319.567	5.149.912	169.655
Rio Grande do Sul	4.107.588	4.015.819	91.769	4.126.427	4.027.285	99.142
Santa Catarina	3.309.511	3.200.684	108.827	3.335.017	3.226.095	108.922

Data source: Agência Nacional de Aviação Civil – ANAC and CGDI/MTur

## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### Domestic passenger flow – Bus stations

National passenger flow 2019			
Bus stations			
Regions and UFs	Total	Outbound passengers	Inbound passengers
<b>North</b>	<b>788.376</b>	<b>394.719</b>	<b>393.657</b>
Acre	3.108	1.339	1.769
Amapá	-	-	-
Amazonas	233.223	101.201	132.022
Pará	204.122	105.893	98.229
Rondônia	226.861	125.583	101.278
Roraima	2.749	1	2.748
Tocantins	118.313	60.702	57.611
<b>North East</b>	<b>3.694.789</b>	<b>1.868.760</b>	<b>1.826.029</b>
Alagoas	466.331	238.354	227.977
Bahia	1.980.559	1.002.391	978.168
Ceará	111.279	56.540	54.739
Maranhão	193.629	97.729	95.900
Paraíba	162.636	82.626	80.010
Pernambuco	174.890	88.054	86.836
Piauí	10.011	5.476	4.535
Rio Grande do Norte	176.819	85.444	91.375
Sergipe	418.635	212.146	206.489
<b>Midwest</b>	<b>5.814.677</b>	<b>2.811.840</b>	<b>3.002.837</b>
Distrito Federal	1.589.027	791.446	797.581
Goiás	2.750.923	1.280.575	1.470.348
Mato Grosso	609.826	301.708	308.118
Mato Grosso do Sul	864.901	438.111	426.790
<b>Southeast</b>	<b>19.346.824</b>	<b>9.622.470</b>	<b>9.724.354</b>
Espírito Santo	1.898.259	949.001	949.258
Minas Gerais	6.744.561	3.383.311	3.361.250
Rio de Janeiro	2.752.613	1.386.474	1.366.139
São Paulo	7.951.391	3.903.684	4.047.707
<b>South</b>	<b>9.968.878</b>	<b>5.035.217</b>	<b>4.933.661</b>
Paraná	6.643.630	3.363.282	3.280.348
Rio Grande do Sul	1.005.292	502.060	503.232
Santa Catarina	2.319.956	1.169.875	1.150.081

*Data source: Agência Nacional de Transporte Terrestre – ANTT and CGDI/MTur*



## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### Distribution of the new supply of housing units (HU)

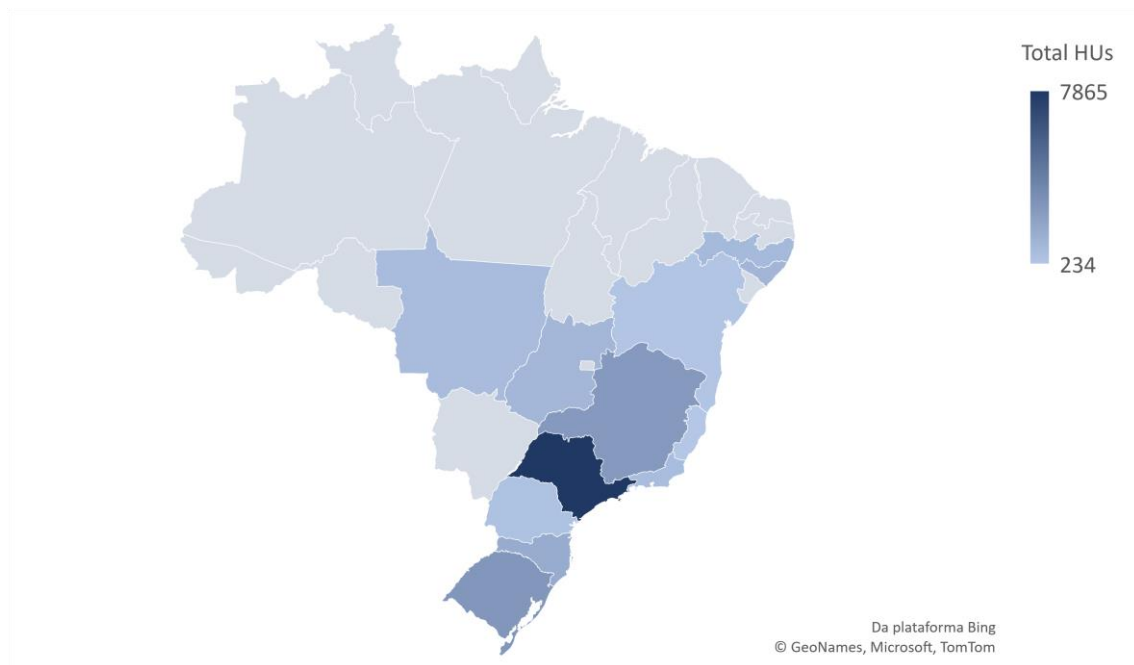
The report “Panorama da Hotelaria Brasileira 2021” by Hotelinvest, with the support of the FOHB - Forum of Hotel Operators of Brazil, pointed out that the expansion of the installed capacity of Housing Units in Brazil will take place in 97 cities, in planned investments until 2025. It means a total investment of R\$6.1 billion.

The report points to an offer of 147 new hotels and 21,906 new HU. The main results of the new offer in the country are:

- 88% of new offers are from traditional brands;
- 77% are located in the South or Southeast region;
- 61% in inner cities;
- 52.5% located in municipalities with up to 300 thousand inhabitants;
- 29% of new projects are franchises;
- 51% are being structured as a condo-hotel;
- 58% refer to budget or super budget hotels.

*Data source: HotelInvest*

#### Target market for new HUs in Brazil



*Data source: HotelInvest*

## DATA AND INDICATORS

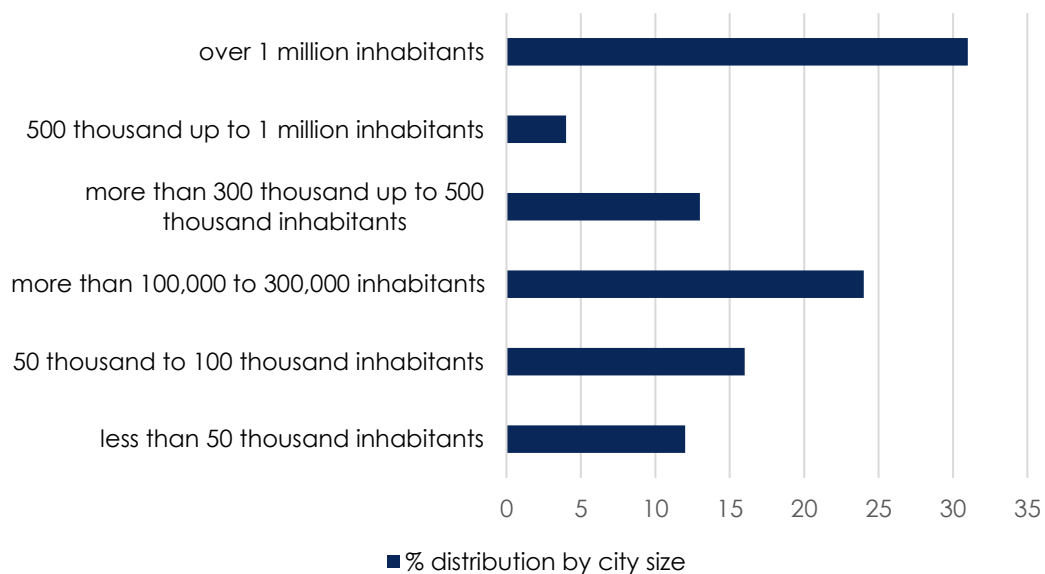
### Infrastructure and Tourist Flow

#### Distribution of the new supply of housing units (HU)

State	Total HUs
São Paulo	7.865
Rio Grande do Sul	2.789
Minas Gerais	2.650
Santa Catarina	1.654
Alagoas	1.124
Goiás	1.061
Pernambuco	930
Mato Grosso	804
Rio de Janeiro	778
Paraná	525
Bahia	349
Amazonas	264
Espírito Santo	234
Ceará	234
Paraíba	180
Mato Grosso do Sul	172
Piauí	150
Sergipe	123
Rio Grande do Norte	72

*Data source: HotellInvest*

#### New offer (in HUs) by type of city



*Data source: HotellInvest*

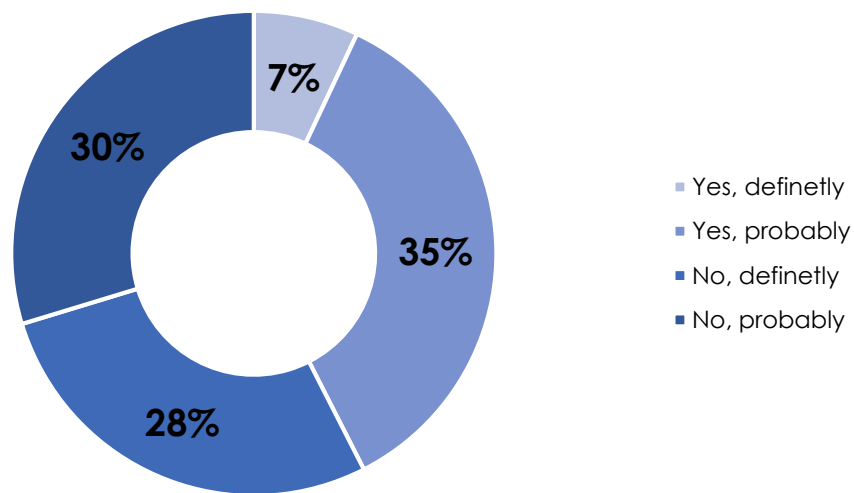
## DATA AND INDICATORS

### Infrastructure and Tourist Flow

#### Business Survey Research – Businessmen in the hotel tourism sector in Brazil

The survey carried out by CGDI/MTur, between the months of January and February 2021, with companies in the accommodation sector in Brazil shows that there is an intention to invest in their establishment for the next six months by about 42.5% of entrepreneurs of Brazil.

#### Investment intention over the next 6 months



Data source: CGDI/MTur

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