

INTELIGENCE REPORT

TOURISM

INVESTMENT

ATTRACTION

Volume 1
1st quarter | 2021

MINISTÉRIO DO
TURISMO



PÁTRIA AMADA
BRASIL
GOVERNO FEDERAL

DATASHEET

PRESIDENT OF THE FEDERATIVE REPUBLIC OF BRAZIL

Jair Messias Bolsonaro

MINISTER OF STATE OF TOURISM

Gilson Machado Neto

EXECUTIVE SECRETARY

Daniel Diniz Nepomuceno

NATIONAL SECRETARY FOR INVESTMENT ATTRACTION, PARTNERSHIPS AND CONCESSIONS

Lucas Felício Fiuza

INVESTMENT ATTRACTION DIRECTOR

João Daniel Ruettimann

GENERAL COORDINATOR OF INVESTMENT ATTRACTION

Karl Heisenberg Ferro Santos

INVESTMENT MAPPING AND MARKET RESEARCH COORDINATOR

Cinthia Fernanda Garcia Marques

TECHNICAL TEAM

Renata Guimarães Machado Ramos

SUPPORT TEAM

Debbiê Glória de Araújo Nunes da Silva

George Harrison Gonçalves Fagundes

Paula Schulz dos Santos

SUMMARY

| | |
|--|-----------|
| PRESENTATION..... | 5 |
| DATA AND INDICATORS | 6 |
| BUSINESS ENVIRONMENT | 6 |
| LABOUR AVAILABILITY AND QUALITY | 11 |
| INFRASTRUCTURE AND ACCESSIBILITY | 12 |
| SIZING OF THE BRAZILIAN TOURISM MARKET | 13 |
| FOREIGN DIRECT INVESTMENT (FDI) IN TOURISM..... | 14 |
| ECONOMY | 20 |
| 2019 FEDERAL TAX COLLECTION..... | 20 |
| FEDERAL TAX COLLECTION JULY TO AUGUST/ 2020..... | 20 |
| EMPLOYABILITY | 21 |
| AVERAGE SALARY PER TOURISM CHARACTERISTIC ACTIVITY..... | 22 |
| DOMESTIC PASSENGER FLOW - AIR TRANSPORT | 24 |
| DOMESTIC PASSENGER FLOW – BUS STATIONS | 25 |
| DISTRIBUTION OF THE NEW SUPPLY OF HOUSING UNITS (HU) | 26 |
| BUSINESS SURVEY RESEARCH – BUSINESSMEN IN THE HOTEL TOURISM SECTOR IN BRAZIL | 28 |
| REFERENCES..... | 29 |
| USEFUL LINKS | 29 |

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.

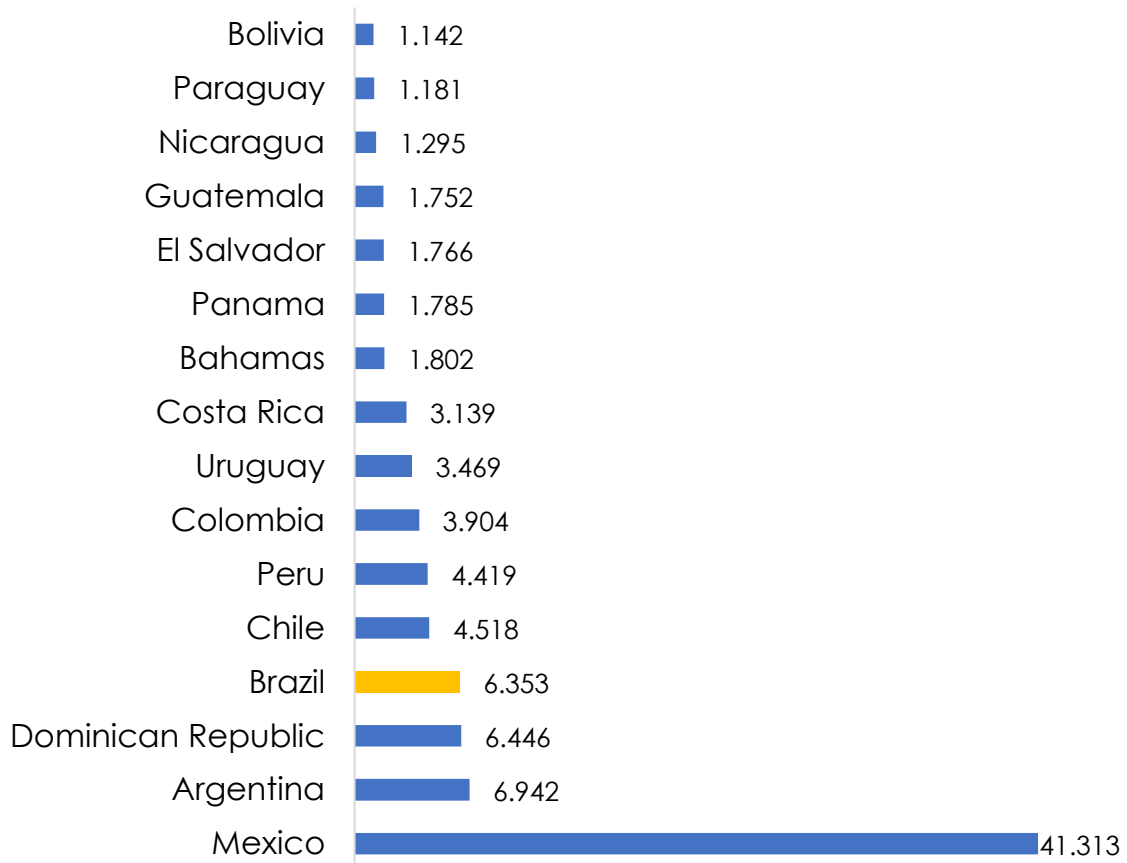
DATA AND INDICATORS

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

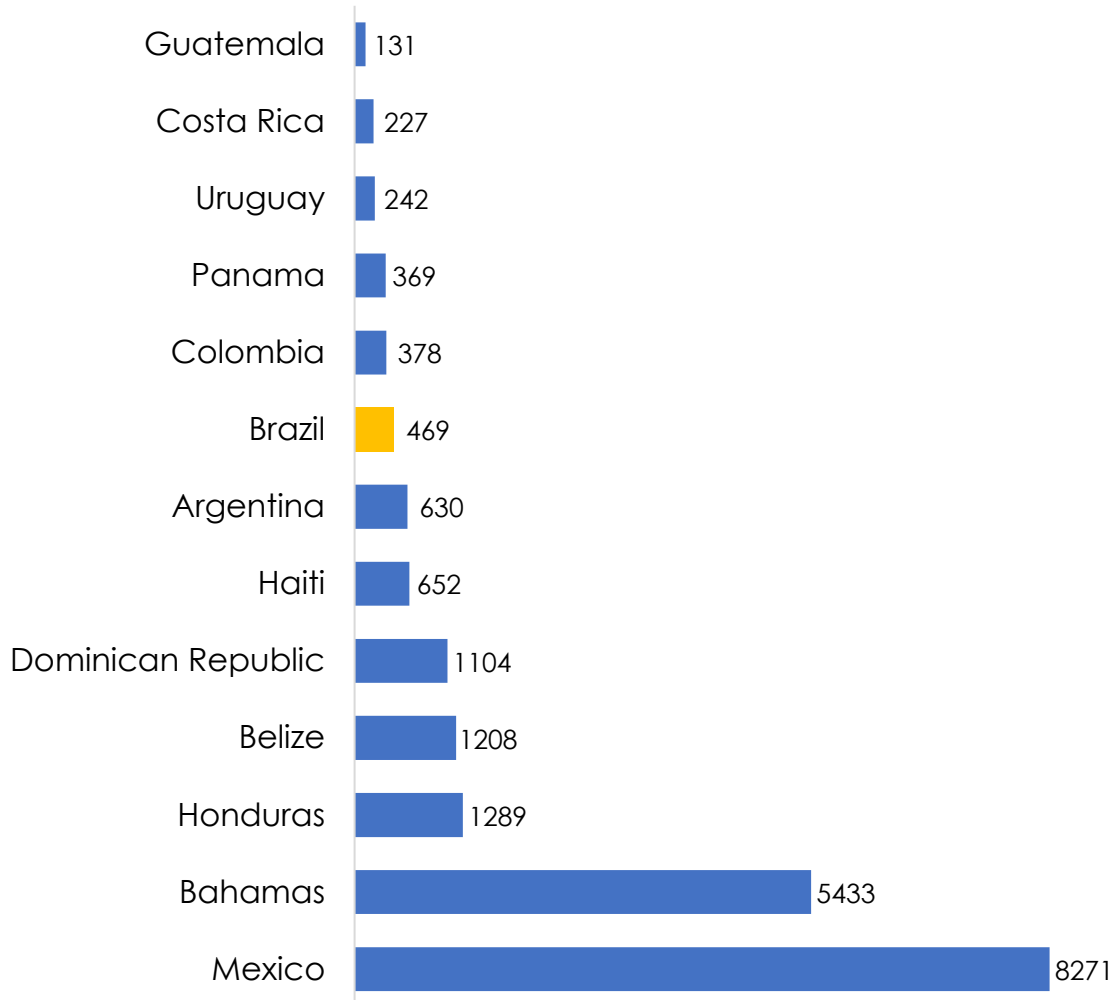


Data source: fDi Benchmark

DATA AND INDICATORS

Business Environment

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



Data source: fDi Benchmark

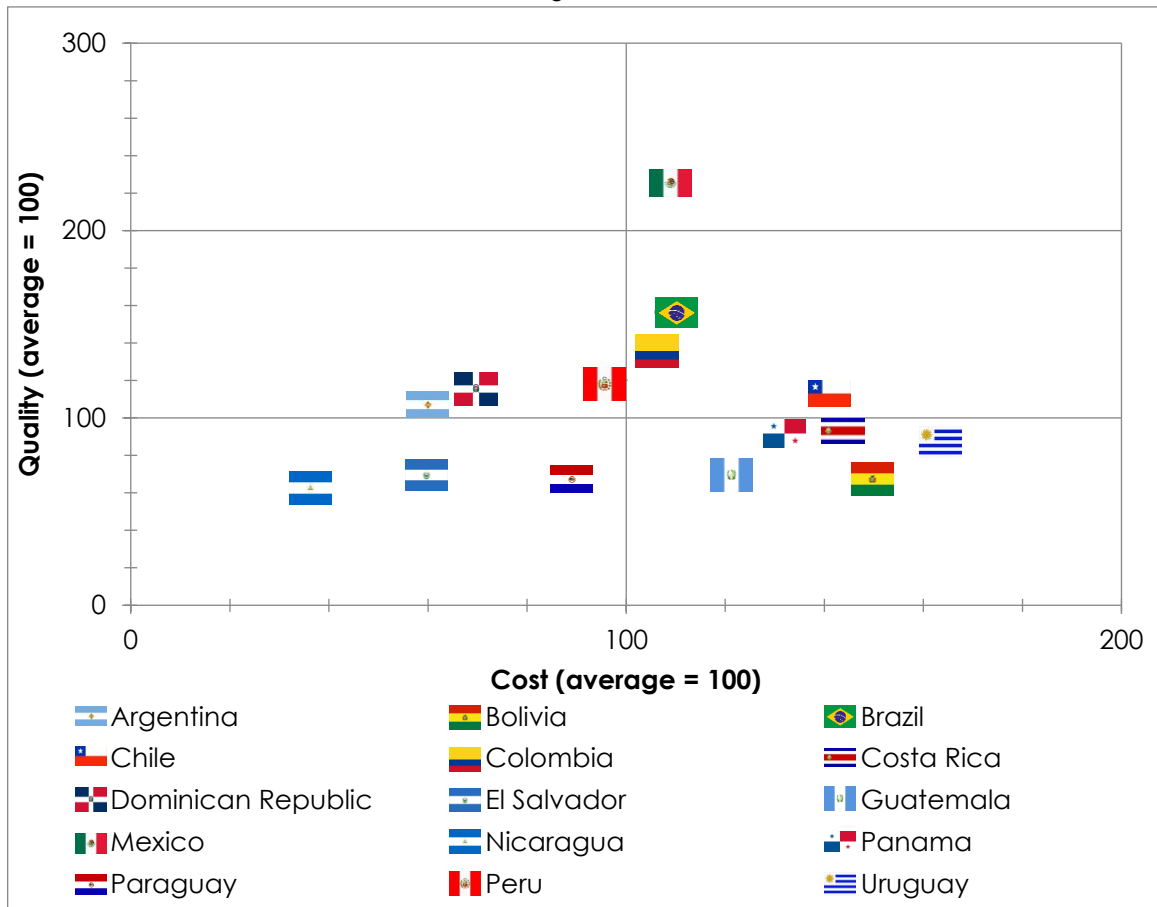
Brazil is, respectively, in fourth and eighth places in this initial cut. The repressed demand and still unexplored market can be understood as opportune as the federal government implements microeconomic reforms that aim precisely to reduce bureaucracy and simplify the rules in the business environment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

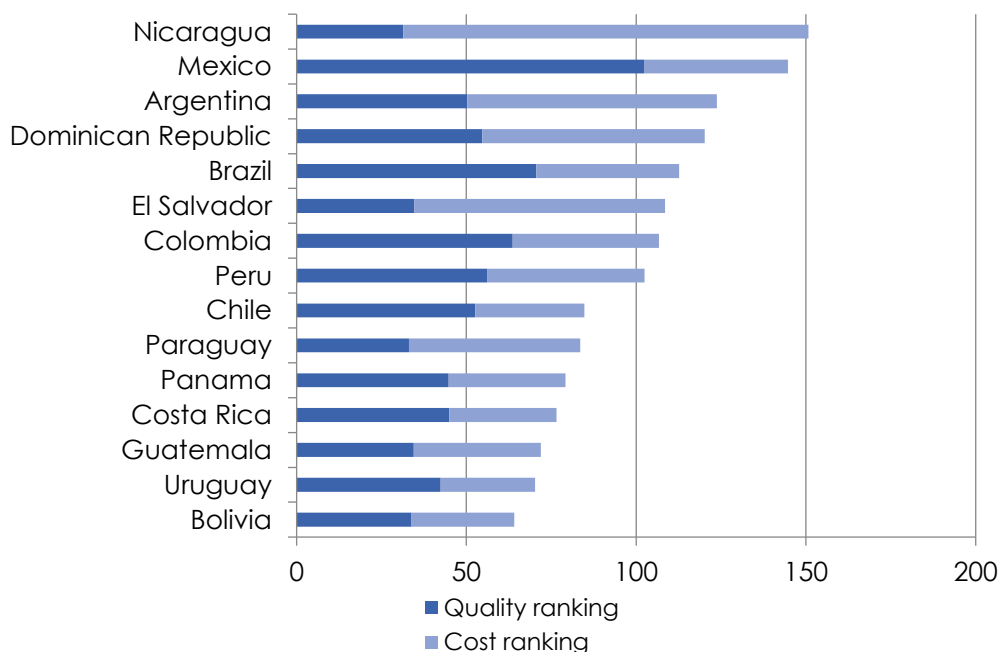
DATA AND INDICATORS

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

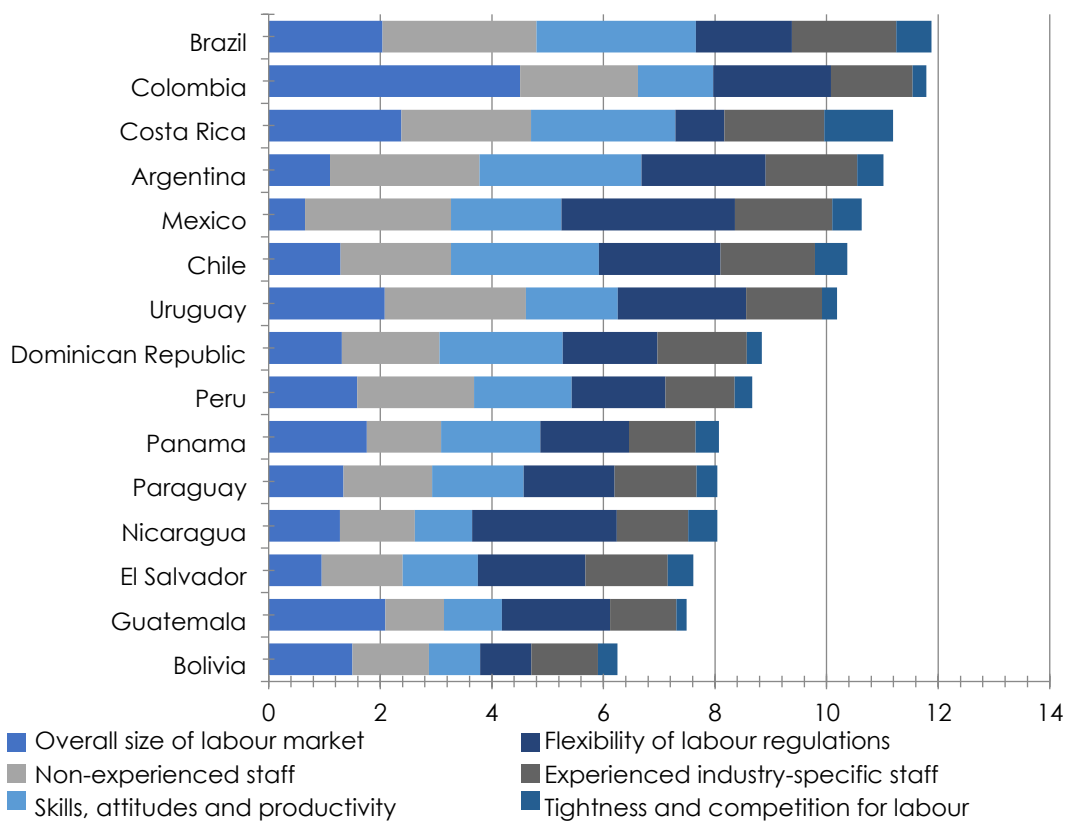
in the accommodation segment. With implementation costs at US\$179,606.00 (2020) and qualitative weight at an equitable 50%, the Mexican (US\$507,001.00) or Brazilian (US\$510,495.00) market stand out as less attractive. However, analysing it in a more sensitive way, it can be seen that both Mexico and 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).



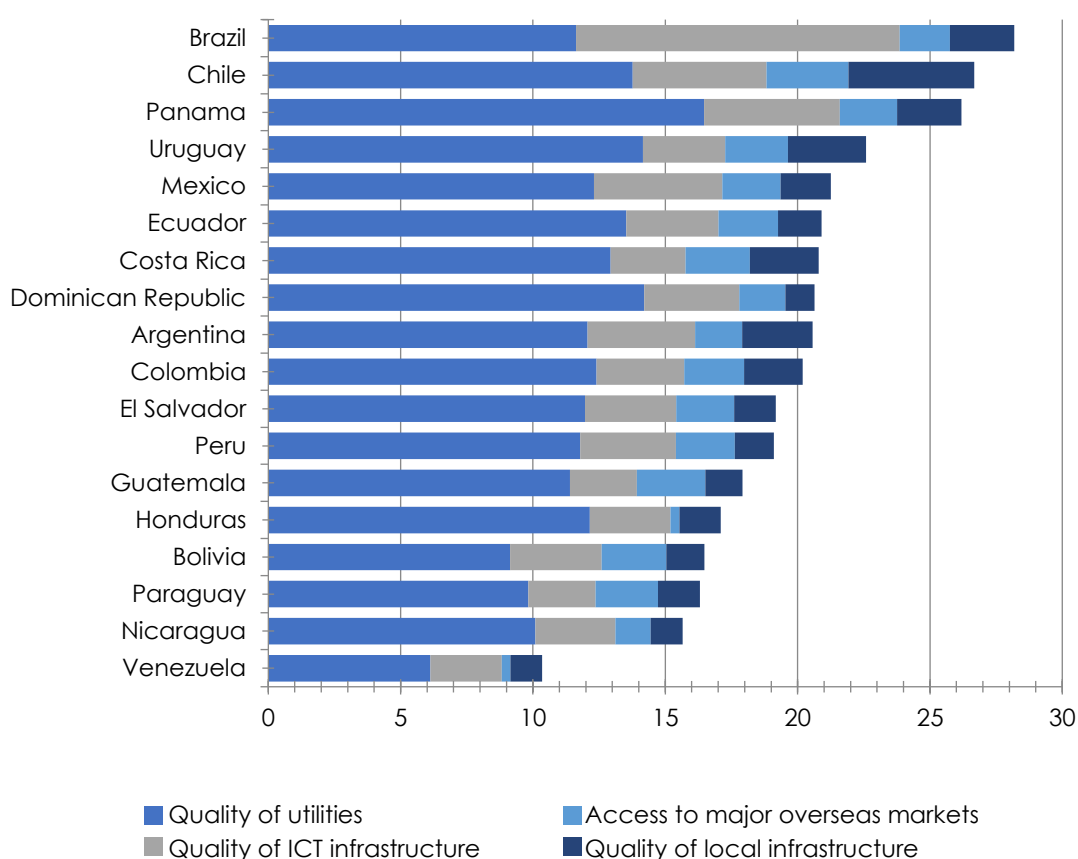
Data source: fDi Benchmark

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](#)¹.

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

¹ 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)². 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 study³, 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 2030⁴.

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

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

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

⁴IFC (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/~/media/IFC/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 |
| Total | 24 | | 5.938 | 247 | 1.050,80 | 43,8 |

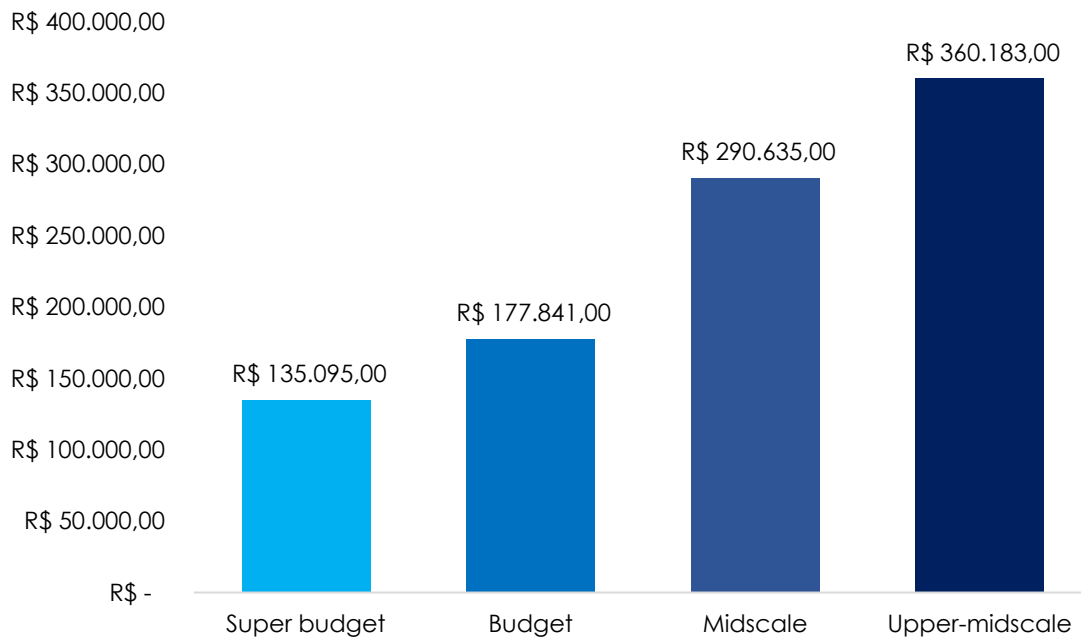
Data source: fDi Markets

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

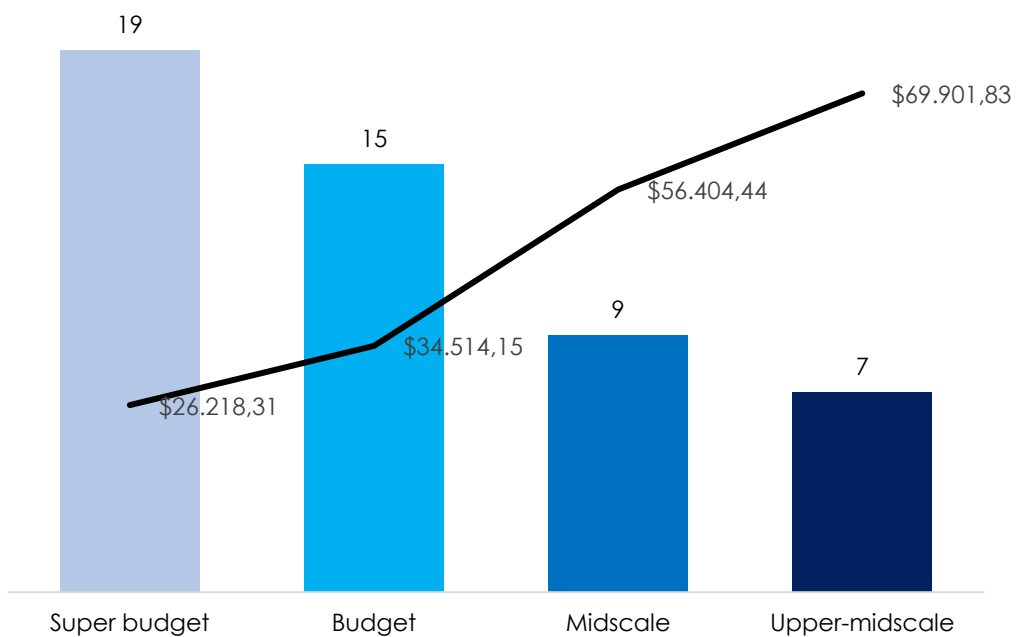
Business Environment

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)

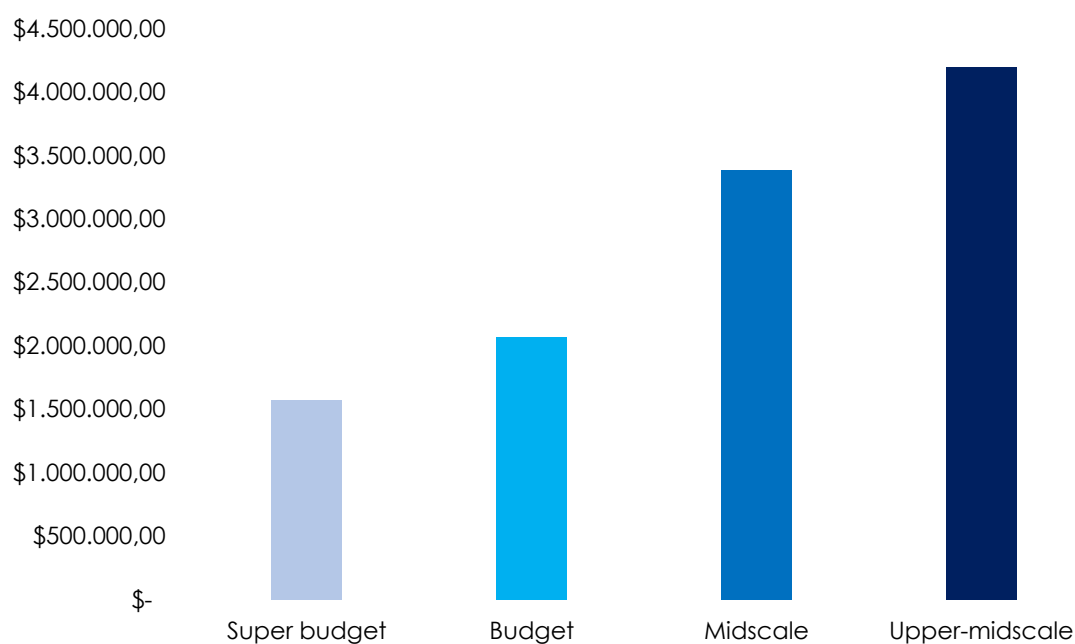


DATA AND INDICATORS

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 AND INDICATORS

Business Environment

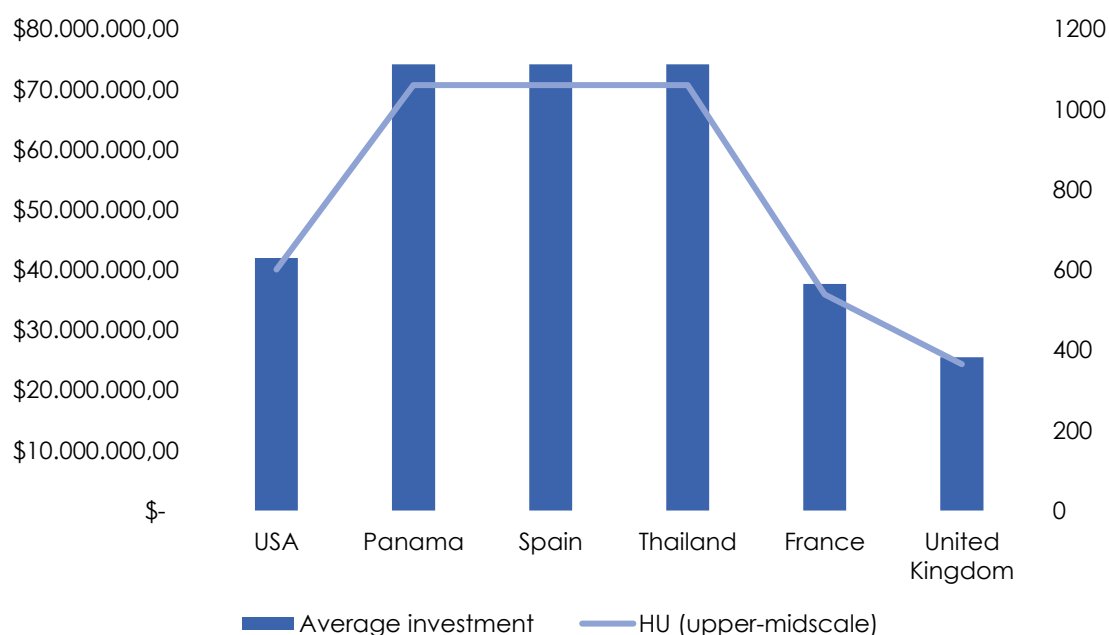
Data source: fDi Markets

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 |
| Total | 24 | 17 | 5.938 | 247 | 1.050,80 | 43,80 |

Data source: fDi Markets

Estimated increase in supply - 2016 to 2021



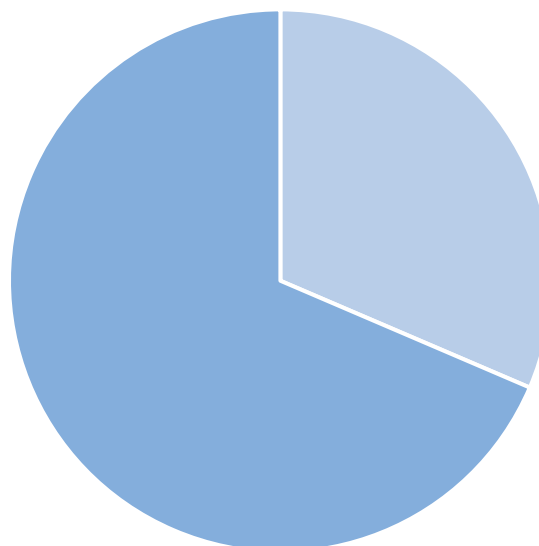
This data is important as it represents only 1.89% of the number of rooms registered in 2019 (246,923) for hotels and flats with international and national flags and with independent administration, all projects with more than 20 rooms.

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 |
| Total | 24 | 100,00 | 17 | 100,00 | 5.938 | 1.050,80 |

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 |
| Total | R\$ 37.682.795.748,00 |

* 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 |
| Total | R\$ 21.365.298.134,39 |

* 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

| | |
|----------------------------|-----------|
| Accommodation | 336.663 |
| Food and beverages | 1.314.836 |
| Land transport | 192.971 |
| Water transport | 8.174 |
| Air transport | 63.657 |
| Car rental | 59.159 |
| Travel agency | 67.728 |
| Culture and leisure | 61.104 |

Data source: CGDI/MTur

Employment by region and Federation Unit

| | Total | | Total |
|---------------------|---------|--------------------|-----------|
| North | 77.643 | Midwest | 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 | Southeast | 1.143.719 |
| Roraima | 3.483 | Espírito Santo | 38.114 |
| Tocantins | 8.654 | Minas Gerais | 214.444 |
| North East | 361.287 | Rio de Janeiro | 244.088 |
| Alagoas | 24.688 | São Paulo | 647.073 |
| Bahia | 106.273 | South | 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 |
| Espírito 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 | | | | | |
|---------------------|------------------------------|-------------------|------------------|--------------------|-------------------|------------------|
| | Transporte Aéreo | | | | | |
| | Passenger boardings | | | Passenger landings | | |
| | Total | Type of flight | | Total | Type of flight | |
| Regular | | Not regular | Regular | | Not Regular | |
| North | 5.306.305 | 5.085.432 | 220.873 | 5.149.113 | 4.916.659 | 232.454 |
| 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 |
| North East | 17.857.073 | 16.810.344 | 1.046.729 | 17.783.312 | 16.763.165 | 1.020.147 |
| 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 |
| Midwest | 12.202.005 | 11.911.104 | 290.901 | 12.164.300 | 11.868.446 | 295.854 |
| 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 |
| Southeast | 48.520.208 | 47.195.556 | 1.324.652 | 48.741.953 | 47.412.252 | 1.329.701 |
| 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 |
| South | 12.734.098 | 12.361.378 | 372.720 | 12.781.011 | 12.403.292 | 377.719 |
| 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 |
| North | 788.376 | 394.719 | 393.657 |
| 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 |
| North East | 3.694.789 | 1.868.760 | 1.826.029 |
| 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 |
| Midwest | 5.814.677 | 2.811.840 | 3.002.837 |
| 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 |
| Southeast | 19.346.824 | 9.622.470 | 9.724.354 |
| 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 |
| South | 9.968.878 | 5.035.217 | 4.933.661 |
| 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)

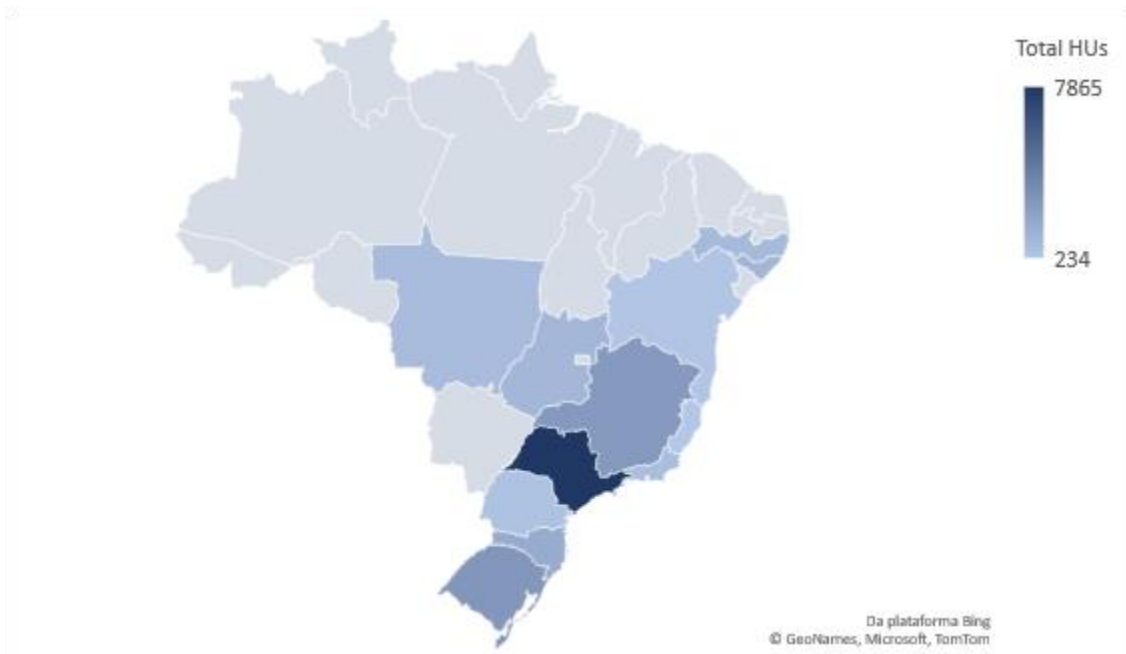
The report “Panorama da Hotelaria Brasileira 2021” by Hotelinvest, with the support of the FOHB - Forum of Hotel Operators of Brazil, pointed out that the expansion of the installed capacity of Housing Units in Brazil will take place in 97 cities, in planned investments until 2025. It means a total investment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

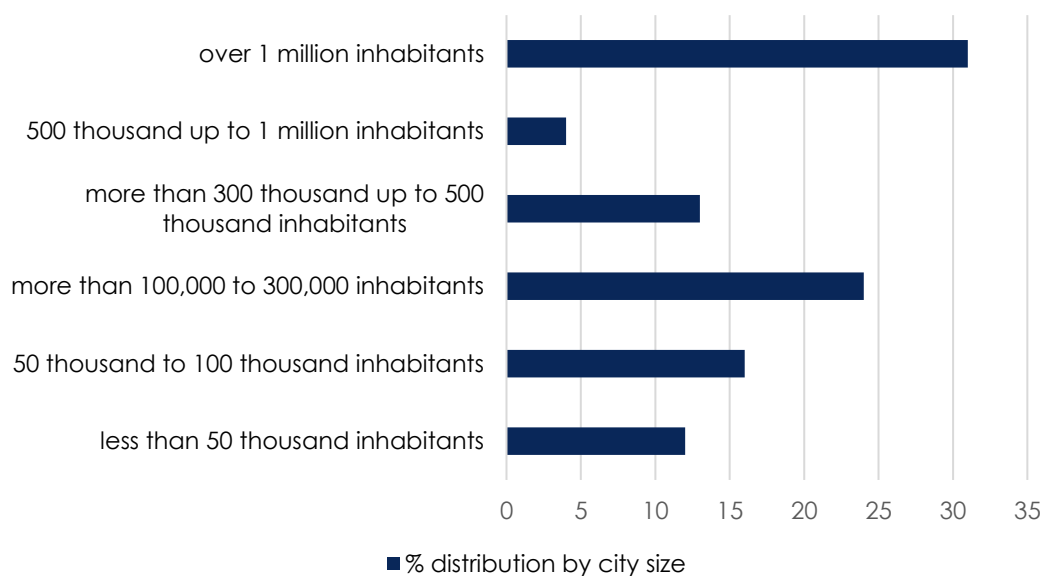
Infrastructure and Tourist Flow

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 |
| Matto Grosso | 804 |
| Rio de Janeiro | 778 |
| Paraná | 525 |
| Bahia | 349 |
| Amazonas | 264 |
| Espírito Santo | 234 |
| Ceará | 234 |
| Paraíba | 180 |
| Matto 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

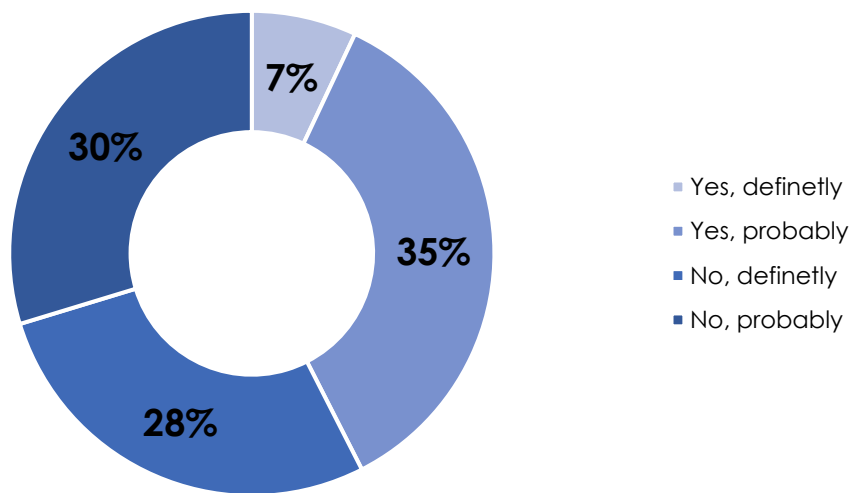
DATA AND INDICATORS

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

REFERENCES

HotellInvest. **Panorama da Hotelaria Brasileira**, 2021 – 15ª edição. Available at: <https://hotellinvest.com.br/panorama-da-hotelaria-brasileira2020-15a-edicao/>. Accessed in april 2021.

Ministério do Turismo. **Anuário Estatístico de Turismo**, 2020. Available at: <http://dadosefatos.turismo.gov.br/2016-02-04-11-53-05.html>. Accessed in april 2021.

Ministério do Turismo. **Pesquisa de Demanda Turística Internacional**, 2019. Available at: <http://dadosefatos.turismo.gov.br/2016-02-04-11-54-03/demanda-tur%C3%ADstica-internacional.html>. Accessed in april 2021.

Ministério do Turismo. **Sondagem Empresarial – Meios de Hospedagem**. Available at: <http://www.dadosefatos.turismo.gov.br/component/k2/itemlist/category/16.html>. Accessed in april 2021.

Receita Federal do Brasil. **Arrecadação por Divisão Econômica da CNAE**. Available at: https://www.gov.br/receitafederal/pt-br/aceso-a-informacao/dados-abertos/receitadata/arrecadacao/arrecadacao-por-divisao-economica-da-cnae/copy_of_nova-proposta. Accessed in april 2021.

Financial Times. **fDi Benchmark**. Available at: <https://www.fdibenchmark.com/>. Accessed in april 2021.

Financial Times. fDi Markets. Disponível em: <https://www.fdimarkets.com/>. Accessed in april 2021.

USEFUL LINKS

ICMBio, **Painel Dinâmico de Informações**. Available at: http://qv.icmbio.gov.br/QvAJAXZfc/opendoc2.htm?document=painel_corporativo_6476.qvw&host=Local&anonymous=true.

Ministério do Turismo. **Mapa do Turismo Brasileiro**, 2019 - 2021. Available at: <http://dadosefatos.turismo.gov.br/2016-02-04-11-53-05.html>.

Ministério do Turismo. **Tourism Investment Hub**. Available at: <https://investimento.turismo.gov.br/>.

Ministério do Turismo. **Biblioteca Virtual da Rede de Inteligência de Mercado do Turismo (RIMT)**. Available at: <https://www.gov.br/pt-br/servicos/acesar-conteudo-da-biblioteca-virtual-da-rede-de-inteligencia-de-mercado-do-turismo>.