INTELLIGENCE REPORT

TOURISM
INVESTMENT
ATTRACTION

Volume 2
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MINISTÉRIO DO
TURISMO

PÁTRIA AMADA
BRASIL
GOVERNO FEDERAL

DATASHEET

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SUMMARY

PRESENTATION

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.

Volume 2 is divided in two parts: the first brings an update on the studies and analyzes of the Brazilian tourism production chain presented in **Volume 1** and de second is aimed to **Connectivity and Mobility**, with panoramas and analyzes of the national scene in the referred theme.

At the Ministry of Tourism, the coordination responsible for the connectivity and mobility policies is the General Coordination of Tourism Mobility and Connectivity - CGMob. In addition, there is the Forum on Tourism Mobility and Connectivity - MOBTur.

Tourist mobility is understood as the autonomous realization of the displacements desired by tourists. Tourism connectivity, on the other hand, refers to the logistical connection, considering infrastructure and services, between various points of tourist interest, which allows trips to be carried out in an integrated and efficient manner, meeting the expectations of tourists and providing conditions for the economic development of the region.
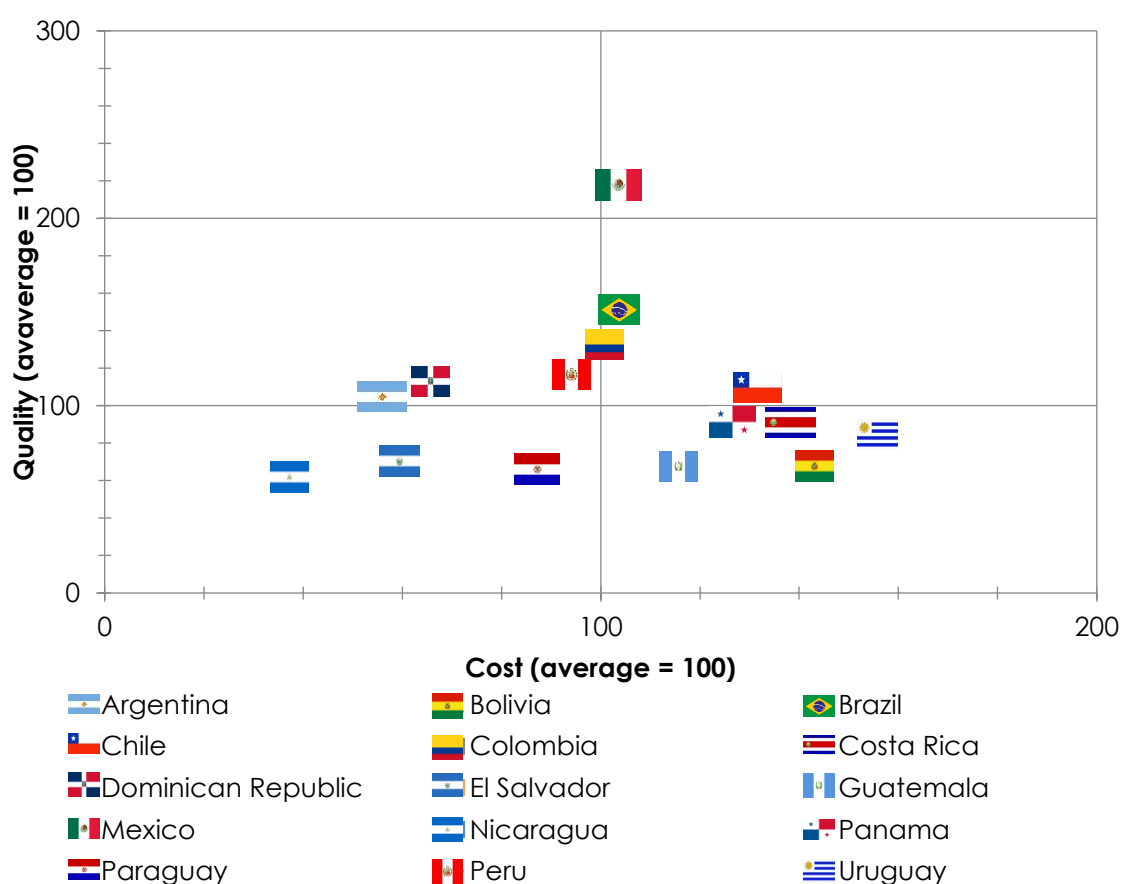
DATA AND INDICATORS
Business Environment

The business environment is an industry's network of suppliers, distributors, competitors, workers and customers. Here, specifically, data focused on tourism and the relationship between Brazil and Latin America are exposed. Considering the importance of continuity of information to verify patterns and changes, there is an exhibition of the same clipping made in the 1st volume of this report: Latin American destinations that have received more than one million overnight tourists or more than one hundred thousand excursionists on cruises seafarers.

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, 2021

Still in relation to the first quarter of 2021, small changes in the quality index were verified, not affecting the countries' overall score. There were no changes in the cost index. Thus, it stands out:

DATA AND INDICATORS
Business Environment

- The country that rose the most in overall score was Panama, with an increase of 0.95%;
- The biggest record drop in the overall score was Guatemala, at 0.99%;
- Brazil had a 0.12% increase in its overall score, which did not affect its position in the ranking.
- In terms of quality, Panama passed Costa Rica, going from 9th to 8th place. The same happened between Bolivia and Guatemala, with Bolivia moving from 14th to 13th position.

Competitiveness comparison - General Ranking – 1st and 2nd quarters of 2021

Location	#	1st quarter/2021 Overall Grade (0-100)	#	2nd quarter/ 2021 Overall Grade (0-100)	Difference Score	%
Mexico	2	99.65	1	100.00	0.35	0.35%
Nicaragua	1	100.00	2	99.92	-0.08	-0.08%
Argentina	3	83.23	3	83.62	0.39	0.47%
Dominican Republic	4	80.42	4	80.64	0.22	0.27%
Brasil	**5**	**77.40**	**5**	**77.49**	**0.09**	**0.12%**
Colombia	6	72.56	6	72.44	-0.12	-0.17%
El Salvador	7	71.99	7	72.20	0.21	0.29%
Peru	8	69.13	8	69.44	0.31	0.45%
Chile	10	57.17	9	57.37	0.20	0.35%
Honduras	9	57.30	10	57.36	0.06	0.10%
Paraguay	11	55.42	11	55.40	-0.02	-0.03%
Panamá	12	52.87	12	53.38	0.51	0.95%
Ecuador	13	52.32	13	52.38	0.06	0.11%
Costa Rica	14	51.17	14	51.13	-0.04	-0.09%
Guatemala	15	47.79	15	47.32	-0.47	-0.99%
Uruguay	16	46.82	16	46.61	-0.21	-0.44%
Bolivia	17	42.55	17	42.55	0.00	0 %

Data source: fDi Benchmark, 2021

DATA AND INDICATORS
Business Environment
Quality comparison – 1st and 2nd quarters of 2021

Location	#	Quality 1st quarter/2021 Grade	#	2nd quarter/ 2021 Grade	Difference #	Score
Mexico	1	217,79	1	218,45	=	0,66
Brasil	**2**	**150,68**	**2**	**150,66**	**=**	**-0,02**
Colombia	3	133,68	3	133,01	=	-0,67
Peru	4	116,69	4	117,36	=	0,67
Dominican Republic	5	112,38	5	112,73	=	0,35
Chile	6	108,91	6	109,29	=	0,38
Argentina	7	104,67	7	105,55	=	0,88
Panamá	9	91,37	8	92,71	1+	1,34
Costa Rica	8	92,02	9	91,68	1-	-0,34
Ecuador	10	86,90	10	86,88	=	-0,02
Uruguay	11	86,31	11	85,50	=	-0,81
El Salvador	12	70,08	12	70,42	=	0,34
Bolivia	14	68,32	13	68,15	1+	-0,17
Guatemala	13	69,71	14	68,10	1-	-1,61
Paraguay	15	66,80	15	66,52	=	-0,28
Nicaragua	16	63,33	16	62,67	=	-0,66
Honduras	17	60,30	17	60,25	=	-0,05

Data source: fDi Benchmark, 2021

Brazil continues in 2nd place in quality and 10th in cost, with a 50/50% parity ratio, which is not ideal to represent reality, but it is a method of identifying the direction of the business environment. Considering this, the ranking of countries is presented as follows:

Graph 1: Quality and Cost - Weight 50/50%
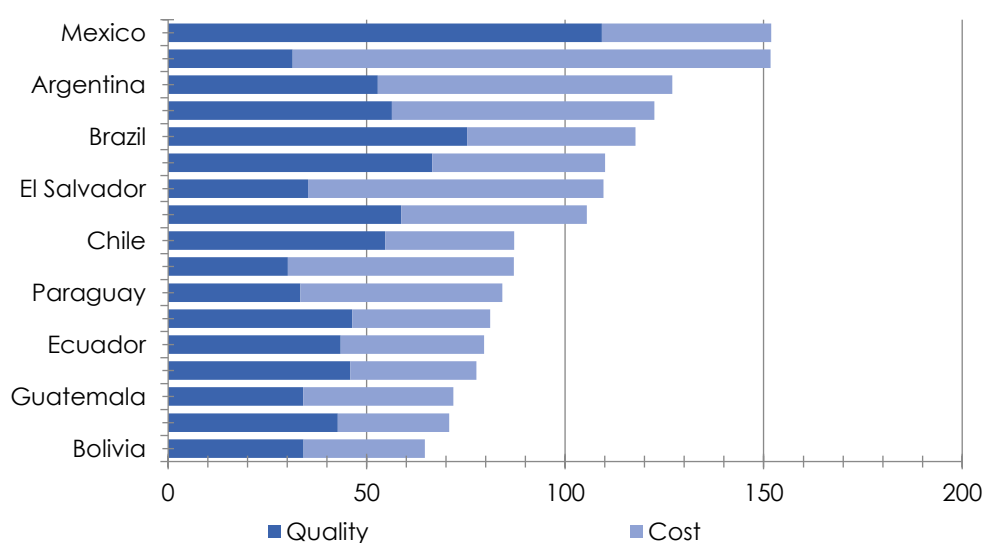
Data source: fDi Benchmark, 2021

DATA AND INDICATORS
Business Environment

Analyzing in more detail, it can be seen that Mexico and Brazil continue to present the best qualitative offer. In terms of market size and potential, the direct competitors are Chile, Mexico and Brazil.

Regarding the Availability and Quality of the Workforce and the Quality of Infrastructure and Accessibility, there was no change in the rankings between the first and the second quarter of 2021.

Dimensioning of the Brazilian tourist market

The Cadastur information is made available by the CGST in the Open Data section of the MTur portal[1]. **The increase recorded in the last year is due to the increase in the budget of the General Tourism Fund (FUNGETUR) since 2020, due to emergency credit for Covid-19.** The difference in the number of service providers registered between the 4th quarter of 2020 and the 1st quarter of 2021 is shown below.

Activity	Number of service providers			
	4th quarter/ 2020	1st quarter/2021	Difference	%
Tour guide*	24,308	24,885	577	2.37%
Tourist camp*	315	366	51	16.19%
Travel agencies*	33,390	33,778	388	1.16%
Accommodations*	16,584	16,761	177	1.07%
Theme parks*	182	198	16	8.79%
Tourist carrier*	14,638	14,568	-70	-0.48%
Venues and Tourist Entertainment Equipment	375	435	60	16.00%
Convention Center	214	216	2	0.93%
Enterprise to Support Nautical Tourism or Sport Fishing	260	302	42	16.15%
Entertainment and Leisure Enterprises and Water parks	377	406	29	7.69%
Car rental	1,771	1,873	102	5.76%
Events organizer*	6,680	7,188	508	7.60%
Event Support Infrastructure Service Provider	3,460	3,886	426	12.31%
Specialized Provider in Tourism Segments	5,193	5,717	524	10.09%
Restaurants, Cafes and Bars	1,608	13,768	2,160	18.61%
*Mandatory registration				

Data source: CGRF/MTur, 2021

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[1] Registration is mandatory for Tour Guides, Tourist Camps, Tourism Agencies, Accommodation Facilities, Theme Parks, Tourist Carriers and Event Organizers. Therefore, it should be noted that the number of active developments may be higher than reported.

DATA AND INDICATORS
Business Environment

There is a general growth in registrations, with emphasis on the following activities: Restaurants, Cafes and Bars (18.61%); Tourist Camps (16.19%); Enterprises to support of Nautical Tourism or Sport Fishing (16.15%); and the Venues and Tourist Entertainment Equipment (16.00%). The only segment that showed a slight decrease was the Tourist Carriers (-0.48%).

There were no changes in the Foreign Direct Investment in Tourism indices or updates in tax collection.

MOBILITY AND CONNECTIVITY
Foreign Direct Investment (FDI)

Between the origin and the destination there is the tourist transit. In some itineraries, this flow by itself is already positively configured as a travel experience. If the mobility and connectivity constraints are not up to the destination, the experience can become a nuisance. As pointed out in the introduction, tourism connectivity refers to the level of logistical connection between various tourist attractions - including their infrastructure and related services. If well thought out, it will allow trips to be carried out in an integrated and efficient manner, meeting the expectations of tourists and providing conditions for the development of the region's tourism potential.

In relation to Foreign Direct Investment, in the Mobility and Connectivity sector, Brazil has received in recent years, **7 projects with a total value of US$ 585.4 million dollars and generated 662 jobs.**

Year	Projects	Investment capital (millions of dollars)	Jobs
2020	4	464.4	122
2019	1	10.5	6
2018	1	10.5	6
2017	1	100.0	528
Total	7	585.4	662

Data source: fDi Markets, 2021

Market sizing

According to fDi Benchmark, the passenger transport industry in Brazil, in terms of number of companies, is the largest in Latin America.

A closer look at the Pareto distribution of these firms will reveal a market that is still unexplored, since it is not possible to disaggregate the business freight companies that eventually carry out tourist transport, from the larger ones. The latter containing more professional brand and market penetration, in addition to the domain municipality. As with any Pareto distribution, approximately 80% of the revenues will come from no less than 20% of the number of existing firms. In the case of passenger land transport, whose market for regular and irregular routes is still frozen, we have something like 11.12% of the firms generating the revenue bulge, 10 firms with more than 1000 employees, 25 with 500 to 999 employees and 90 in the range of 250 to 499 employees in this segment.

MOBILITY AND CONNECTIVITY
Market sizing

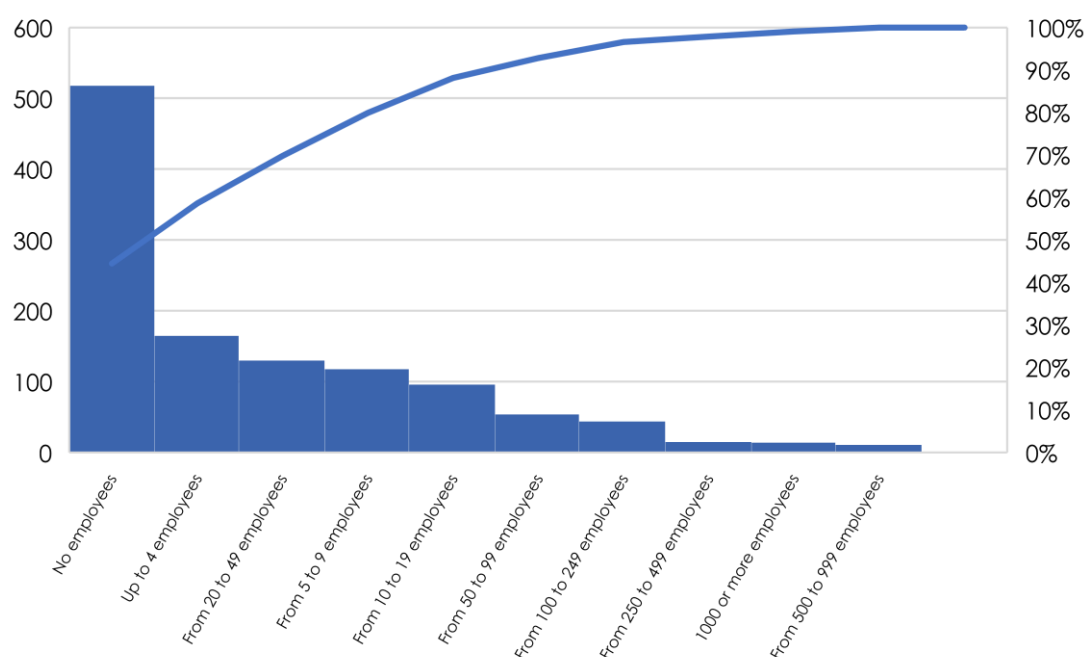**Graph 2:** Distribution of Land Transport Firms (Pax) 2019 - IPEA – ACT
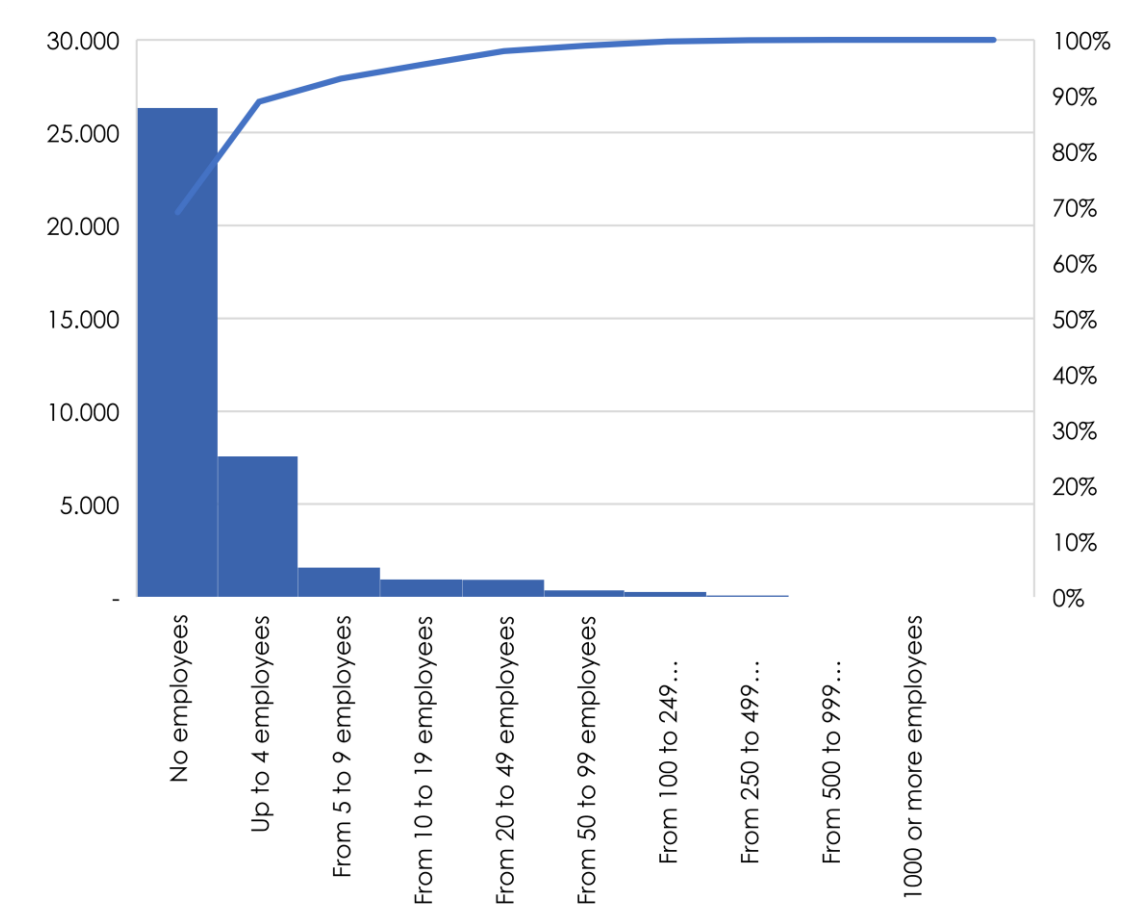
Data source: IPEADATA, 2019

It should be noted that the sector comprises road, air and waterway. On the road, the best option is the tourist charter.

In the same Pareto distribution logic, we observe in **Graph 3** a specific characteristic in the air transport sector. In the domestic market for regular lines, there is a predominance of three companies: the multinational LATAM, followed by Azul and Gol. According to the Brazilian Association of Airline Companies (ABEAR), the fleet of the main long-haul aircraft in this segment contracted from 536 aircrafts in 2017 to 502 in 2019, out of a total of 15,000 aircrafts. On the other hand, these same 502 aircrafts, equivalent to 3.35% of the total, which are operated by the three companies, were responsible for offering 99% of the seats and revenues in the sector.
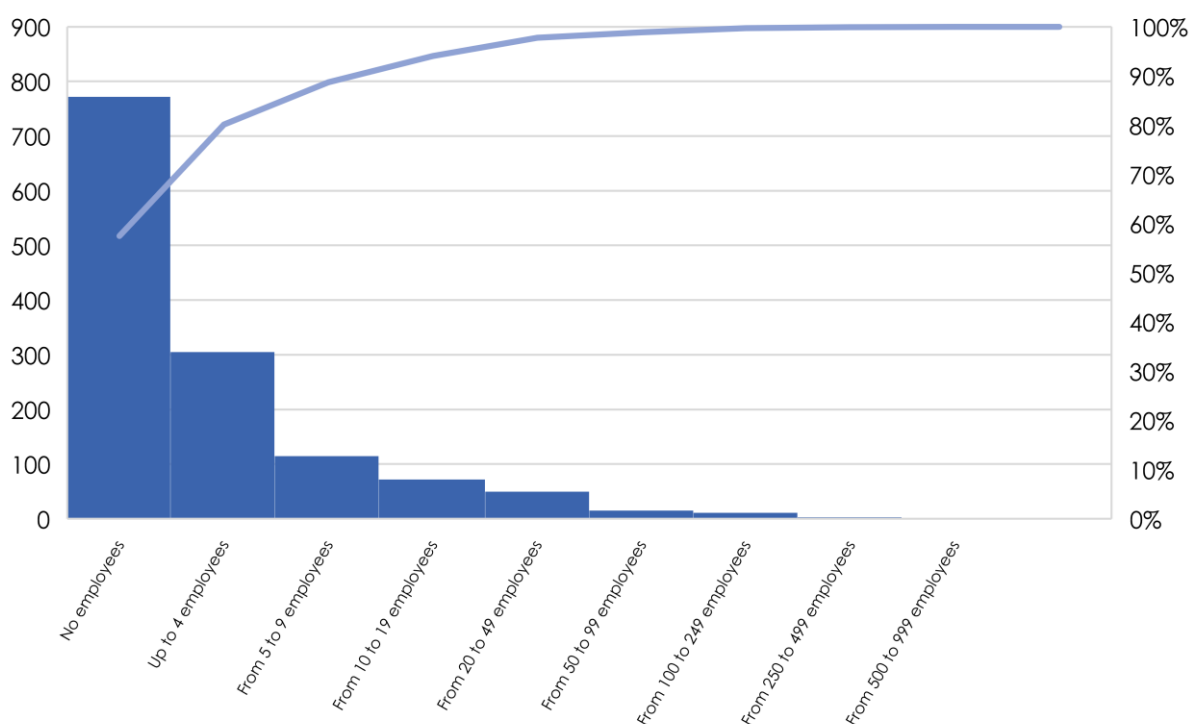
Graph 3: Distribution of Air Transport Firms (Pax) 2019

Finally, the waterway transport sector has characteristics similar to road passenger land transport, with emphasis on its use in the Amazon, northern region of the country.

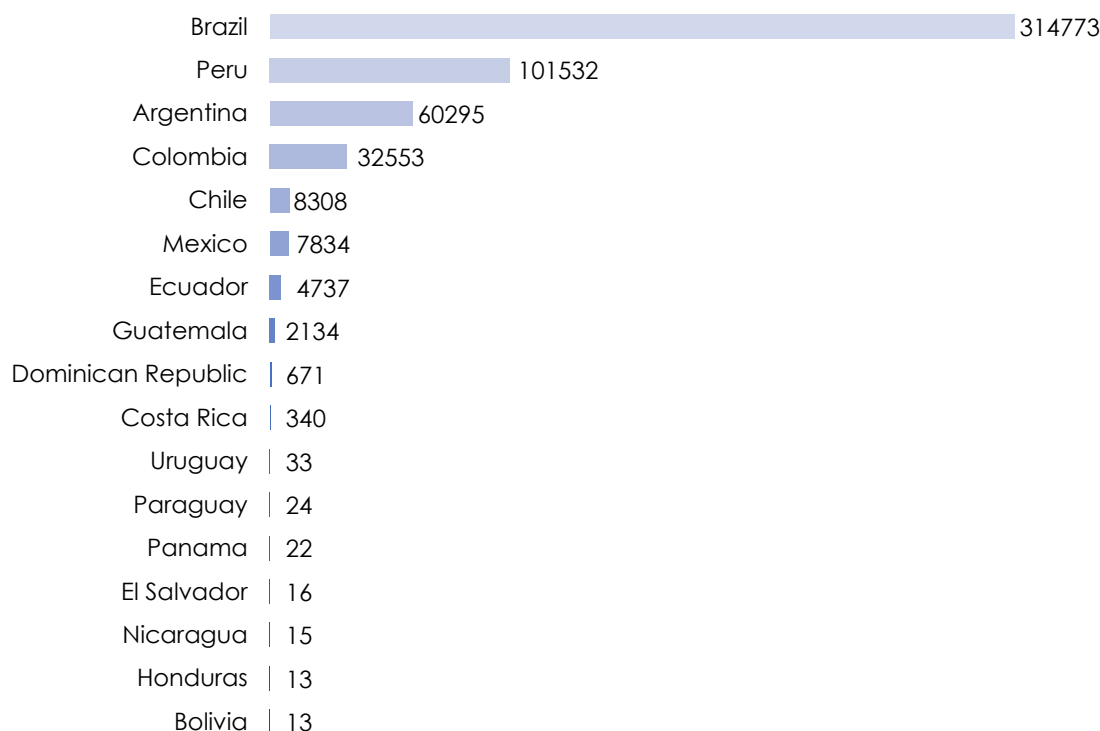**Graph 4:** Distribution of Water Transport Firms (Pax) 2019

MOBILITY AND CONNECTIVITY
Market sizing

Graph 5: Dimension of the passenger transport industry, 2021

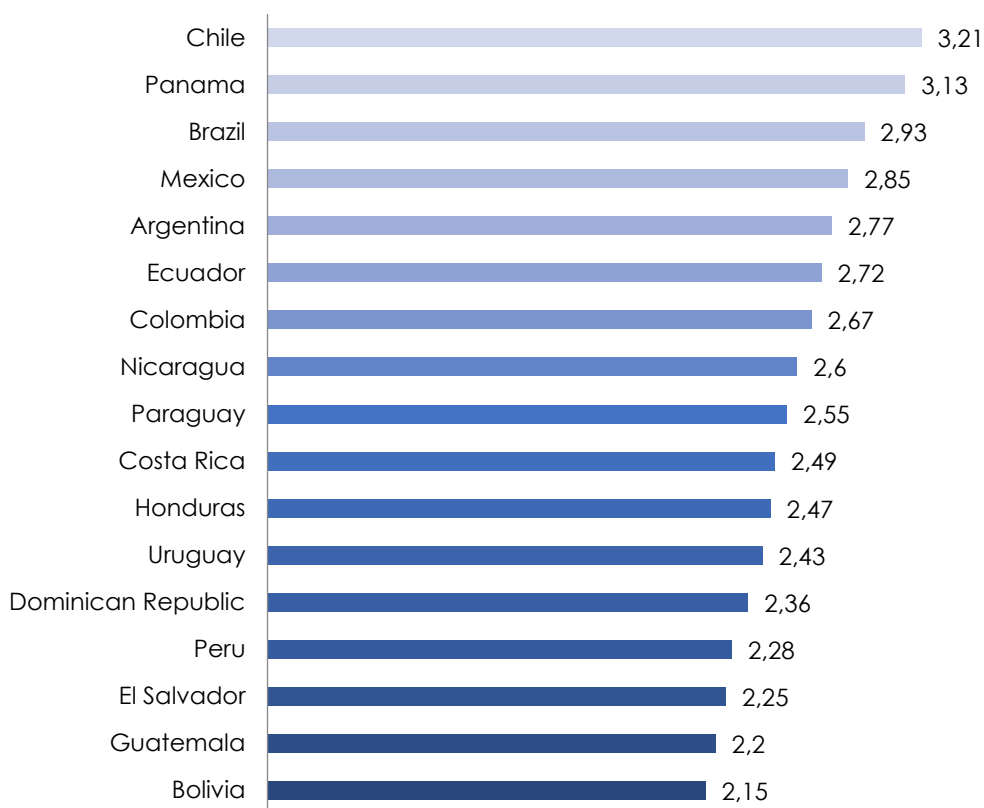| Country	Value
Brazil	314773
Peru	101532
Argentina	60295
Colombia	32553
Chile	8308
Mexico	7834
Ecuador	4737
Guatemala	2134
Dominican Republic	671
Costa Rica	340
Uruguay	33
Paraguay	24
Panama	22
El Salvador	16
Nicaragua	15
Honduras	13
Bolivia	13

Data source: fDi Markets, 2021

The Foreign Trade and Transport Infrastructure Quality index is part of the already consolidated Logistics Performance Index (LPI) of the World Bank. The score varies between "very low" (1) and "very high" (5). Brazil occupies the 3rd place in the ranking of Latin America, scoring 2.99 (0-5), **13% above the Latin America average**. The top 5 is composed, in order, of Chile, Panama, Brazil, Mexico and Argentina. The countries with the worst indicators are Dominican Republic, Peru, El Salvador, Guatemala and Bolivia. It is worth mentioning, given the disparity in the dimensions and populations of the respective countries. In the absence of a sub-regional LPI index, we are left with the distorted impression that the infrastructure endowment of the less developed states is equivalent to that of the more developed ones. Namely, the density of paved roads and railways per 100 km² in the state of São Paulo is closer to that presented in the United States of America than in the rest of the country.
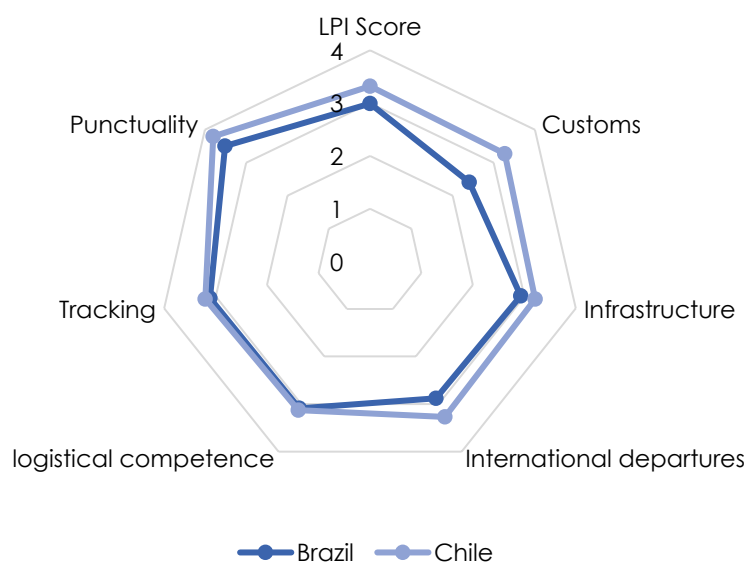
MOBILITY AND CONNECTIVITY
Market sizing

Graph 6: Quality of Foreign Trade and Transport Infrastructure

Country	Score
Chile	3,21
Panama	3,13
Brazil	2,93
Mexico	2,85
Argentina	2,77
Ecuador	2,72
Colombia	2,67
Nicaragua	2,6
Paraguay	2,55
Costa Rica	2,49
Honduras	2,47
Uruguay	2,43
Dominican Republic	2,36
Peru	2,28
El Salvador	2,25
Guatemala	2,2
Bolivia	2,15

Data source: fDi Benchmark, 2021

Graph 7: Logistics Performance Comparison (LPI) Brazil and Chile
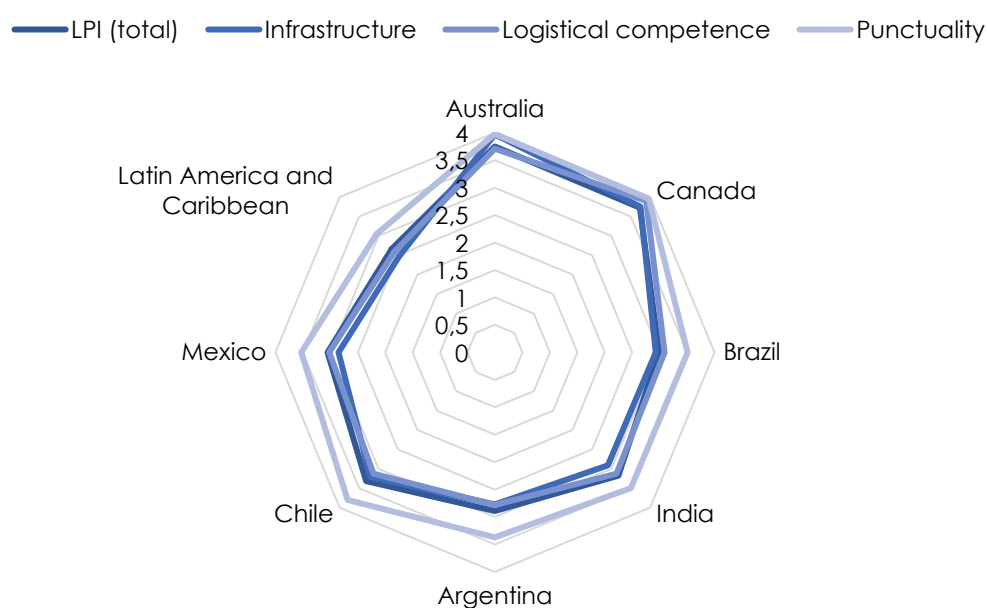
Data source: World Bank, 2018

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MOBILITY AND CONNECTIVITY
Market sizing

From another perspective of greater attention to the potential investor in the tourism production chain, some of the LPI criteria consist of: the infrastructure at the destination, the level of logistical competence and its punctuality, which positively or negatively affect the supply chain, as well as the level expected quality in service delivery. **Graph 8** chose some competitors with different degrees of development in these criteria and that constitute continental economies, both mature and emerging. We highlight the overall LPI score of the contenders, pointing out the main ones in Latin America above the regional average.

Graph 8: Logistics Competitiveness Index – Selection

Data source: World Bank, 2018

Investors who want to capitalize on the transport segment in the tourism production chain should pay attention to three fundamental points: which are: the origin and destination pairs with the best potential for investing; where they are; and how many potential customers there are. To draw this panorama, it is necessary to use two tools:

- Market research via big data; and
- use of these data via two analysis methodologies.

One of the premises of the tourism economy is the pattern of falling attractiveness due to distance, understood here in its spatiotemporal dimension and in how it reflects on consumer choices. The last and most

extensive study in this line, carried out by the Hong Kong Polytechnic[2], points to a pattern of exponential decline in demand (whether for good or service) as distance increases. This is the "Distance Decay Model (DDM)".

Of course, other factors are important, such as: the type of trip segregated by frequency, point-to-point of short duration and higher frequency or multi-destination, long-term and aspirational (low frequency), the level of development of the market pairs and the traveler, the market appeal of the destination in the OD matrix, how easy accessibility and connectivity are, as well as which cost aspects provided by the business environment that positively or negatively affect the destination. That said, the aforementioned study considers that the law of falling distance is a fact after analyzing 1,915 O-D pairs in the world among 146 destinations that represented 77.3% of the world tourism demand in 2002.

It was found, synthetically, that 80% of international tourism takes place within 1,000 km of the origin, that for each additional thousand km there is a drop in demand of approximately 50% and that there is the possibility of observing three types of curve with their respective "effective zones of tourist exclusion" as distance increases, as shown in Figure 2 of the survey reproduced below. In the Brazilian case, ZEET has plateaus in the immediate South American environment and peaks, not surprisingly, in the main markets demanded by the Brazilian international outbound flow – Europe and North America, as shown in figure 3 of the research.

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[2] McKercher, Bob; et al. The Impact of Distance on International Tourist Movements. Journal of Travel Research, vol. 47, n.2, November 2008 208-224 http://jtr.sagepub.com

MOBILITY AND CONNECTIVITY
Market sizing

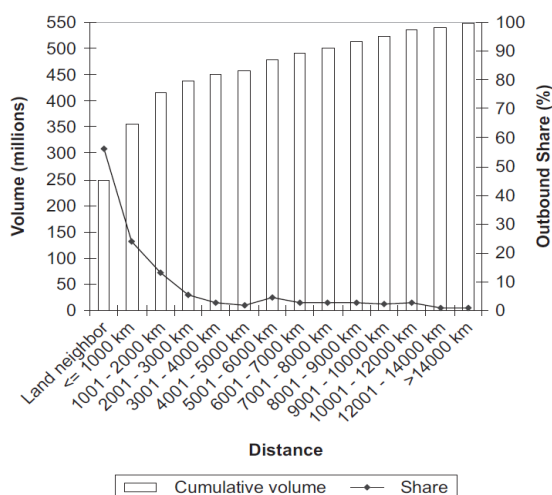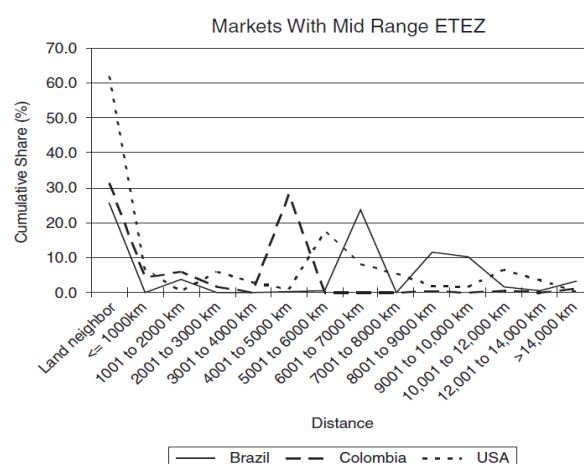**Figure 2: Cumulative arrival volume**

Figure 3: Brazil's ZEET

In addition to DDM, there is the gravitational model, used in supply chain. In short, it starts from the hypothesis that the number of trips produced by zone i, in various modes of transport, and attracted by zone j is directly proportional to the size of its economies and inversely proportional to the distance between them. These two methods, combined with big data, provide a mapping of the real matrix and O-D potential of the Brazilian air market. The study was carried out by the Ministry of Infrastructure, EPL and Labtrans, whom the Ministry of Tourism has hired to carry out similar mapping studies.[3]

Big data was captured from mobile telephony in 2017 via a partnership with the company Telefónica / Vivo. The aggregated user tool allows you to cross-reference the data and provides accurate information that allows you to draw up scenarios for the expansion of supply and demand. These, by the way, are crucial to the potential investor.

The research captured 1.881 billion trips, 77% of which used a private car – confirming the validity of the preference for destinations closer to the center of gravity of the consumer's origin. The investor's target, therefore, focuses on the remaining 23%. In terms of collective modes of transport, there were about 1.27 million journeys by rail (0.3%), 3.43 million journeys by waterway (1%), 337.40 million by road and about 74.5 million air

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[3] Encontros de Planejamento da Aviação Civil, 2020-2040. Webinar Matriz Origem Destino – bigdata da telefonia móvel real. Ministério da Infraestrutura, 2019.

passengers in 2017 (18%). In 2019, 95.290 million paid passengers were transported on domestic routes and 24.140 million on international routes, prefiguring an increase of 27.91% for domestic passengers compared to 2017. In short, the Brazilian air market handled 119.430 million paid passengers in 2019. Having impacted tourism by adding a direct value of R$19.1 billion, indirectly in R$4.9 billion and induced in R$29 billion, totaling R$50.3 billion in total contribution to the tourism production chain and adding R$103.4 billion or 1.4% of the Brazilian GDP in 2019.

A relevant data for investors is that the country had 1.806 billion displacements in the 60,130 available land connections.

O-D Matrix in Unique Land Routes		
Southeast	36.0%	21,647
South	22.7%	13,650
North East	19.9%	11,966
Midwest	13.9%	8,358
North	7.6%	4,570
Total land connections		60,130

For the airline sector, 5,273 connections between airports were identified, which handled around 74.5 million passengers in 2017.

O-D Matrix in Single Air Routes		
Southeast	26.5%	1,397
South	23.9%	1,260
North East	17.9%	944
Midwest	17.8%	939
North	13.8%	728
Total air connections		5,273

In the aerial mesh there is an average competitive overlap of 62.9%, ranging from a minimum of 42.2% in the North to a maximum of 90.4% in the Southeast, where there is the highest concentration of economic and population gravity centers in the country. Here, DDM and gravitational models come into play in reading the big data and provided scenarios. The study concluded that in Brazil each airport has, on average, 4.13 competitors. Last May, ANAC reported that the average domestic route comprises 654 km and 1h43 in average mission time. Currently, the photograph of airports by size and classification of the Civil Aviation Secretariat (SAC) is shown in the following table:

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MOBILITY AND CONNECTIVITY
Market sizing

Market sizing: public aerodromes by class, 2021 (May)	
Equipment class	Number of registered public aerodromes
Class I	464
Class II	23
Class III	17
Class IV	12
Total	516

Note: the classes are determined by RBAC 153, based on the arithmetic average of the number of PAX transported in the reference period (minimum movement of 500 on regular flights). Synthetically, the biggest ones are in class IV.

Aerial OD matrix of catchment areas - hubs and spokes
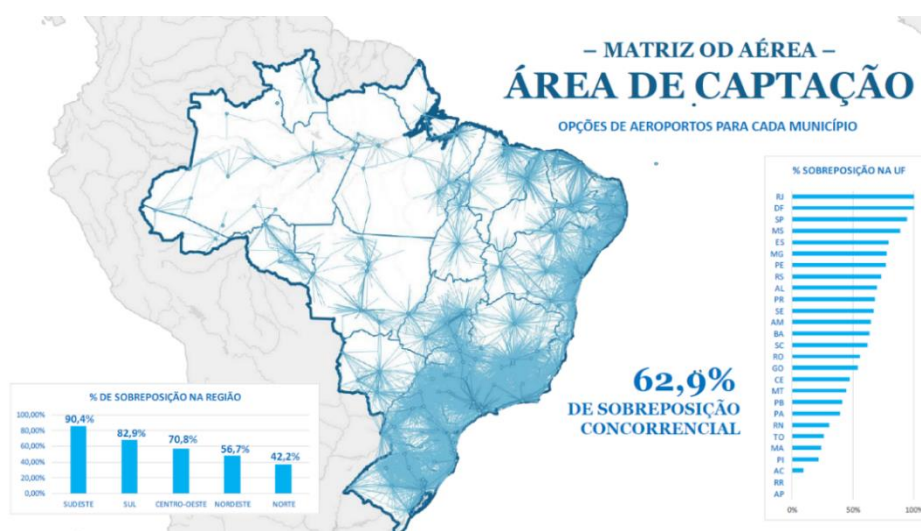
On the study of viable potential routes that could be developed in the country. Two scenarios were drawn, one with a linear connection matrix (point-to-point) and the other optimized centered on the system of nodes and axes (hubs-and-spokes) which has already been developed in the country, given the overlapping of airports in the Territorial Units of Planning. Here are some of the basic parameters of these scenarios that the investor should keep in mind when planning the routes' potential:

- The percentage of the population with income above two minimum wages in the UTP of origin and destination, which represents 92% of the demand for air transport;
- The minimum distance of 140 km of large arc;
- Minimum annual demand of 624 passengers (pax), in short, at least operate a Caravan with two weekly frequencies and a load factor of 70%;
- Connection between airports already in operation and granted as well as those provided for in PAN 2018-2038.

The most realistic scenario is the second, which considers all operating or potential O-D connections in a model of nodes and axes in

an optimized network that also includes the other modes of transport. In short, by 2038 it is possible that the Brazilian domestic market will increase demand by up to 76%, with an increase in demand of around 73 million pax, increasing the new economically viable routes by 178.57% (about 675), configuring a total universe of 1,053 connections in the national OD air network. This would increase industry revenues by US$16,893 billion, a potential increase of 91% over revenues measured in 2019. Brazil's viable domestic market potential could reach 168,759 million paid passengers transported in this period.

Viable Market Potential Scenario – Overhead OD Matrix – MINFRA.

	Base (2019)	Scenario 2 - Optimized Integrated Network	Variation
Domestic demand (PAX)	95,749,995	168,759,995	76%
Industry revenue (US$)	US$ 8,841,078,434	US$ 16,893,769,835	91%
Offer (ASK)	11,964,560,807	98,160,659,585	-17%
Number of viable O/D connections	378	1053	178,57%

Components of Scenario 2

Aircraft	Scenario 2	
	Pax (max. load)	Number of viable potential routes with 100% observed viability
E190E2	106	41
E195E2	132	13
A220-100	115	27
A220-300	141	13
A319Neo	140	3
B737-M7	156	473
ATR-72	68	77
ATR-42	45	134
CESNA CARAVAN	9	207
Total		988

MOBILITY AND CONNECTIVITY
Civil Aviation Situation

With a high correlation rate with tourism (above 90%), it is not surprising that one of the sectors most impacted by the Covid-19 pandemic in Brazil was civil aviation. The sector registered large drops in the monthly movement of passengers as of March 2020, as well as a significant contraction in the density of the air network. The Horus System, of the National Civil Aviation Secretariat, presents data on infrastructure, operation and performance of aerodromes in Brazil. From it, it is possible to carry out analyzes of the aviation situation month by month. Therefore, an overview of the industry, impacts and recovery of Covid-19 is presented.

Graph 9: Comparison of monthly passenger movement via regular and non-scheduled flights, embarkation and disembarkation, capital and regional airfields, **domestic flights** 2018 – 2021
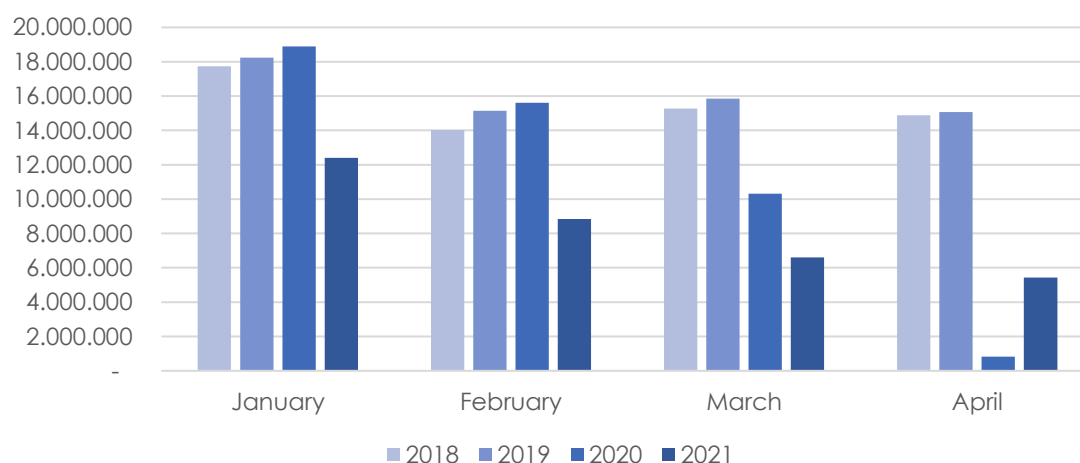
Data source: CGMob and Horus System – Ministério da Infraestrutura, Secretaria Nacional de Aviação Civil.

Graph 9 shows the comparative evolution of the number of passengers transported monthly on regular and irregular domestic flights (including departures and arrivals) for the years 2018 to the present year. No turning point has yet been observed in the accumulated growth rate at pre-pandemic levels.

The greatest impact observed occurs in the monthly movement of international passengers, since, as the pandemic worsened, restrictions were imposed on the borders between countries, being these reasons for initiatives discussed at the World Tourism Organization and other institutions consulted. The OMT has followed the level of restrictions existing in the international transit of air passengers. Its tenth report shows that 34%

of all destinations in the world are partially closed, while 36% require negative proof of contagion (via tests). There are, for now, significant regional differences, with the European market having countries with more severe restrictions in a smaller number (13%) while 70% of destinations in Asia and the Pacific are completely restricted to international travel. In the Americas, the rate of countries with closed borders is at 20%.

Vaccines and Digital Solutions to Ease Travel Restrictions (unwto.org)

Characteristic in abrupt and pronounced drops such as those experienced since March of last year, the sensitivity in any recovery variation could mistakenly signal a positive scenario. Three general patterns can be observed after a depression, a recovery in V, since the installed capacity was not destroyed, a fall in L, to a lower level where installed capacity is destroyed, and a recovery in W, where the underlying factors and structural aspects of the crisis have not yet been remedied. It seems to us that in the Brazilian domestic scenario we have a V-shaped recovery so far. Disclaimer must be made to the international market. For example, in Graph 10 we have a 412.81% increase in international movement in April 2021 compared to the same month in 2020. However, the number of passengers transported is reduced compared to non-pandemic years.

Graph 10: Comparison of monthly passenger movement via regular and non-scheduled flights, embarkation and disembarkation, capital and regional airfields, **international flights** 2018 – 2021
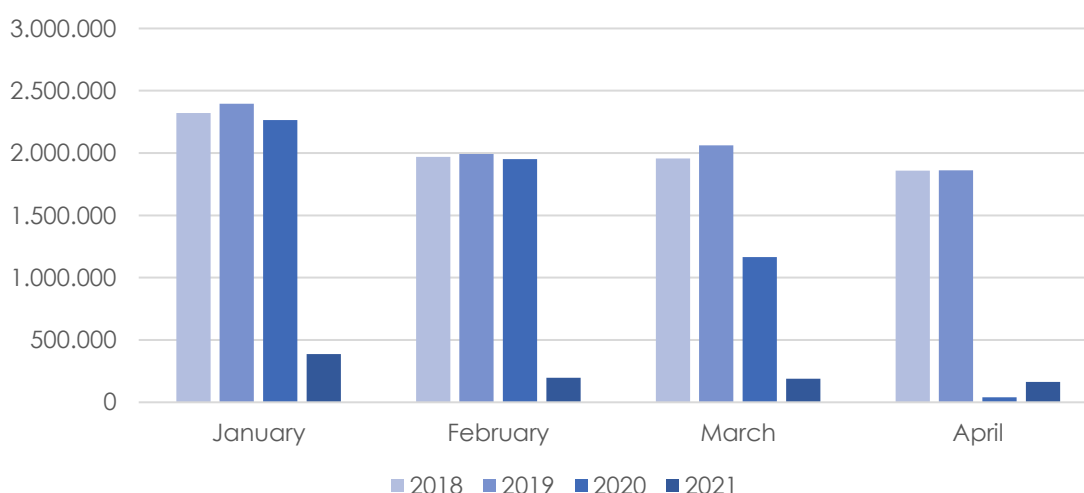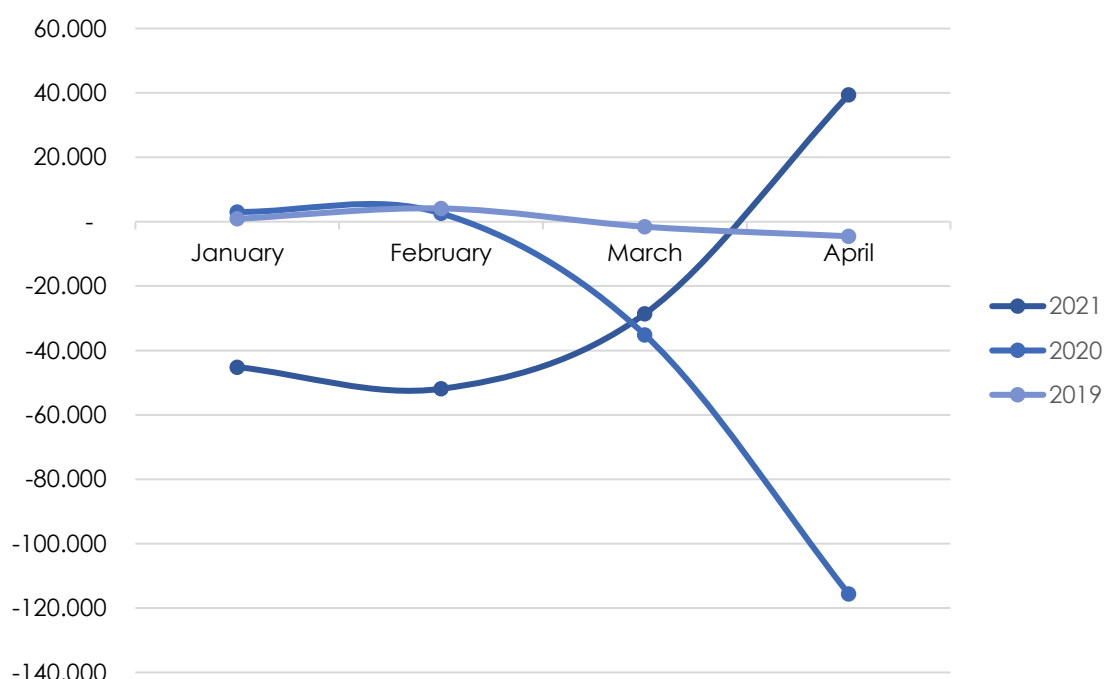

Data source: CGMob and Horus System – Ministério da Infraestrutura, Secretaria Nacional de Aviação Civil.

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When observing the difference in the number of aircraft in monthly movement, related to the same period of the previous year, there is greater clarity in the dimension of the fall and the beginning of recovery of national flights in the country. It should be considered that the analysis is comparative, relative to the previous year and needs to be appreciated together with the global values, presented in a table after the graph.

Graph 11: Difference in the monthly movement of aircraft via regular and non-scheduled flights, embarkation and disembarkation, capital and regional airfields, **domestic flights** 2019-2021

Data source: CGMob and Horus System – Ministério da Infraestrutura, Secretaria Nacional de Aviação Civil.

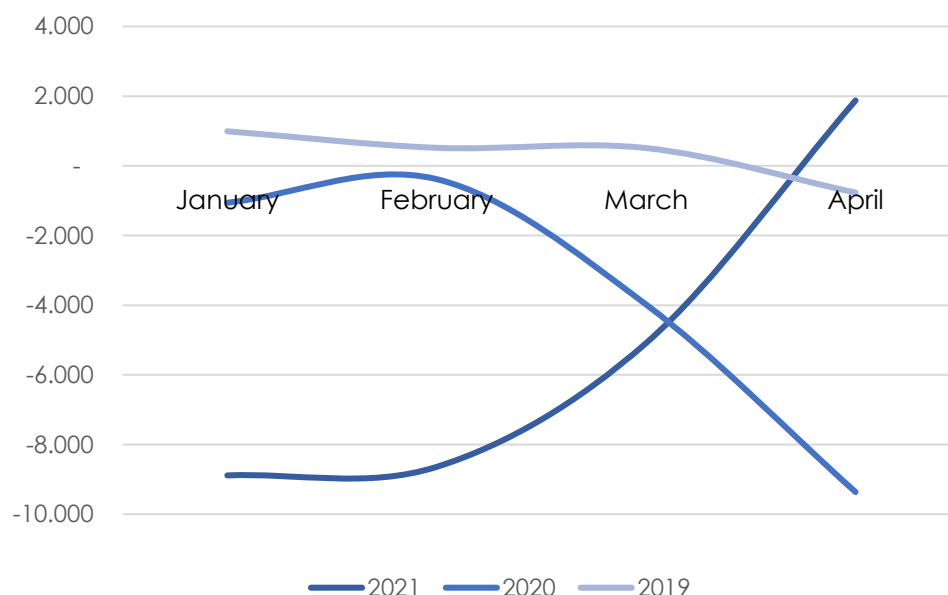| Domestic flights - Global values				
	2021	**2020**	**2019**	**2018**
January	106,470	151.633	148.608	147.712
February	78,168	130.070	127.469	123.351
March	69,826	98.425	133.556	135.121
April	49,884	10.526	126.120	130.636
Domestic flights - Difference from the previous year				
	2021	**2020**	**2019**	
January	- 45.163	3.025	896	
February	- 51.902	2.601	4.118	
March	- 28.599	-35.131	-1.565	
April	39.358	-115.594	-4.516	

Data source: CGMob and Horus System – Ministério da Infraestrutura, Secretaria Nacional de Aviação Civil.

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Similar recovery movement, in its due proportions, can be observed in the difference of the international movement of aircraft.

Graph 12: Difference in the monthly movement of aircraft via regular and non-scheduled flights, embarkation and disembarkation, capital and regional airfields, international flights 2019-2021

| International flights - Global values				
	2021	**2020**	**2019**	**2018**
January	4,165	13,053	14,114	13,123
February	3,174	11,816	12,200	11,683
March	3,412	8,500	12,483	11,974
April	3,219	1,343	10,707	11,476
International flights - Difference from the previous year				
	2021	**2020**	**2019**	
January	- 8,888	-1,061	991	
February	- 8,642	-384	517	
March	- 5,088	-3,983	509	
April	1,876	-9,364	-769	

Data source: CGMob and Horus System – Ministério da Infraestrutura, Secretaria Nacional de Aviação Civil.

In the document Conjuncture of the Air Sector - May 2021, published by the Ministry of Infrastructure, it is presented that, between May 2020 and April 2021, the transport of 82.3 million processed passengers was registered, indicating a drop of 58.2 % in relation to the amount verified in the same period of the previous year. In the first four months of 2021 (January to April), the movement of processed passengers was 34.2 million travelers, 33.0% less than that calculated in the same period of time in 2020, before the pandemic.

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MOBILITY AND CONNECTIVITY
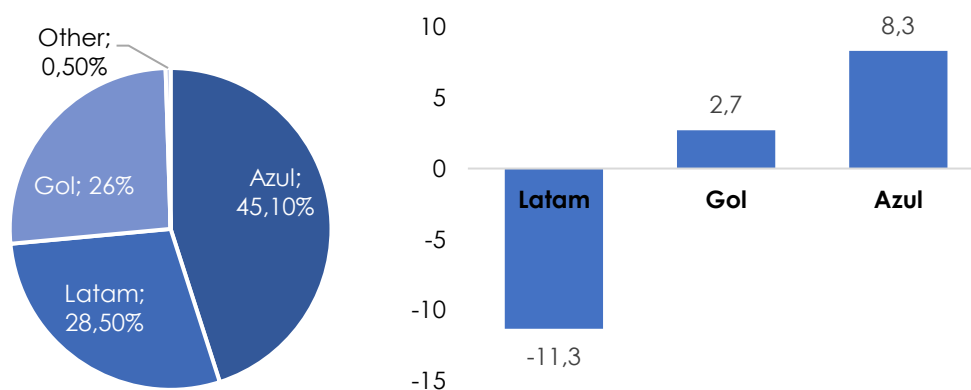## Civil Aviation Situation

Graph 13: Evolution and annual variation in the movement of passengers processed at Brazilian airports in April (2004-2021)
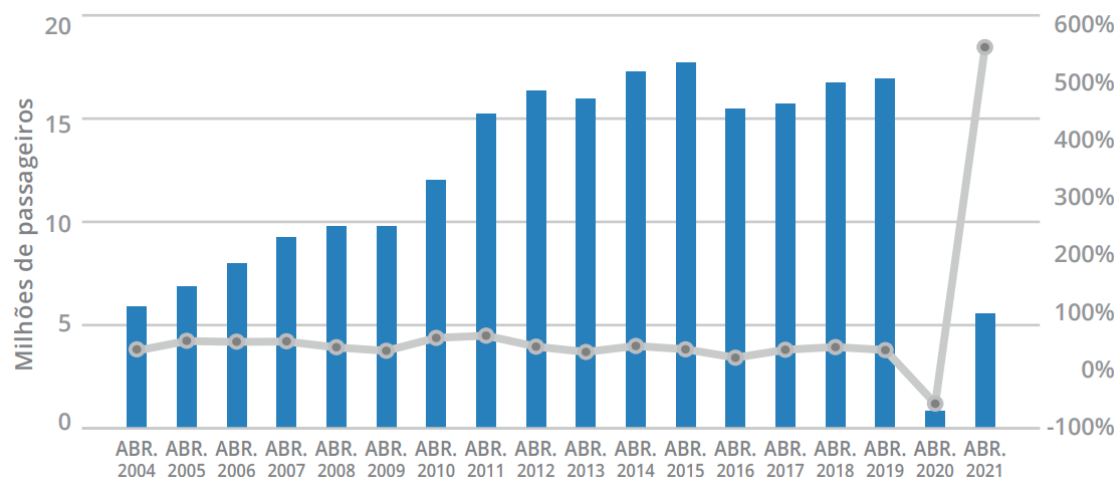
Data source: CGMob and Horus System (BRASIL, 2019b). Data obtained on: May/2021. Elaboration: LabTrans/UFSC (2021)

In addition, in April 2021, 5.6 million processed passengers were transported, indicating **a recovery of 544.4% compared to the figure registered in April 2020**. Despite the strong increase, the result is characterized as the second lowest in the entire historical series for the month, just ahead of the amount calculated in April 2020, heavily impacted by the Covid-19 pandemic. Compared to April 2019, the movement in the same month of 2021 was 67.0% lower. Subsequently, the same document presents the market share of airlines in the domestic market and their respective variations in percentage points, relative to April 2021.

Graph 14: *Airline market share in the Brazilian market and percentage changes, April 2021*

Data source: CGMob and ANAC (2020). Data obtained in: May/2021. Elaboration: LabTrans/UFSC (2021)
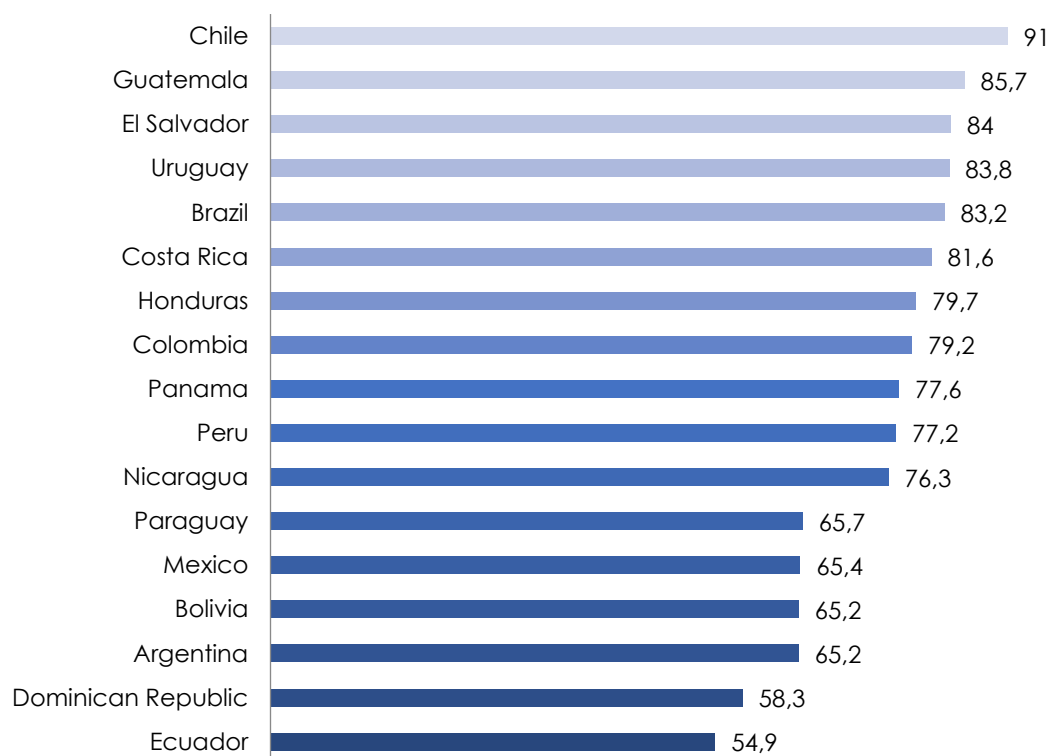
MOBILITY AND CONNECTIVITY
Civil Aviation Situation

In April 2021, compared to the same month in 2020, there were increases of 239.7%, in the number of hours flown, and 288.2%, in the amount of fuel consumed. However, compared to April 2019, the indicators showed drops of 60.7% and 66.3%, respectively. In 2021, compared to the same period in 2020, both indicators showed a decline: 33.0%, in the number of hours flown, and 34.3%, in the amount of fuel consumed.

With regard to taxes and fees for access to international air transport, Brazil occupies the 5th position in relation to Latin America, in a ranking of 2018. This means that **the country is among the 5 that charge the most fees and taxes in this geographic selection**.

Graph 15: Taxes and fees for access to **international air transport**, 2018

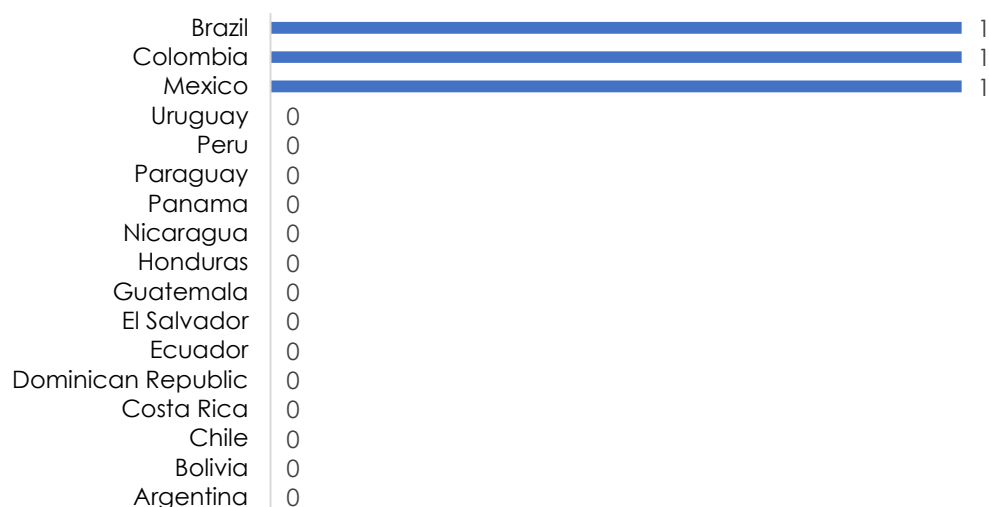| Country	Value
Chile	91
Guatemala	85,7
El Salvador	84
Uruguay	83,8
Brazil	83,2
Costa Rica	81,6
Honduras	79,7
Colombia	79,2
Panama	77,6
Peru	77,2
Nicaragua	76,3
Paraguay	65,7
Mexico	65,4
Bolivia	65,2
Argentina	65,2
Dominican Republic	58,3
Ecuador	54,9

Data source: fDi Benchmark, 2021

In 2019, the Official Airline Guide Megahubs identified the 50 most internationally connected airports in the world. The Index is generated by comparing the number of scheduled connections to and from international flights with the number of destinations served by the airport. In this sense, the only countries in Latin America that are part of the ranking are Brazil, Colombia and Mexico, with one airport each.

MOBILITY AND CONNECTIVITY
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Graph 16: International hubs, 2019

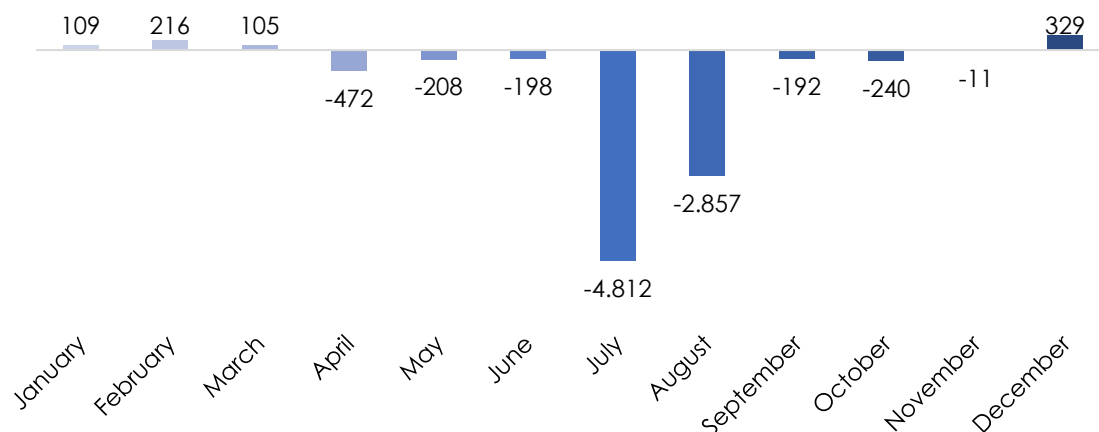| Country	Value
Brazil	1
Colombia	1
Mexico	1
Uruguay	0
Peru	0
Paraguay	0
Panama	0
Nicaragua	0
Honduras	0
Guatemala	0
El Salvador	0
Ecuador	0
Dominican Republic	0
Costa Rica	0
Chile	0
Bolivia	0
Argentina	0

Data source: fDi Benchmark and OAG Megahubs Index

Work and Employment in Air Transport

The Air Transport ACT had a reduction of 8,331 jobs in 2020. With a higher negative balance of hirings in July, the sector only presented a positive balance of hirings again in December.

Graph 17: Balance of Hirings and Dismissals at Air Transport ACT, by macro-region, 2020

| Month	Value
January	109
February	216
March	105
April	-472
May	-208
June	-198
July	-4.812
August	-2.857
September	-192
October	-240
November	-11
December	329

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed (CAGED) and Annual Social Information Report (RAIS).

The most significant drop in jobs occurred in the Southeast region. It should be considered that the region was responsible for 70% of formal occupations in the sector in 2019. The smallest drop was seen in the North region.

MOBILITY AND CONNECTIVITY
Civil Aviation Situation

Graph 18: Balance of Hirings and Dismissals at ACT Transporte Aéreo, by macro-region, 2020
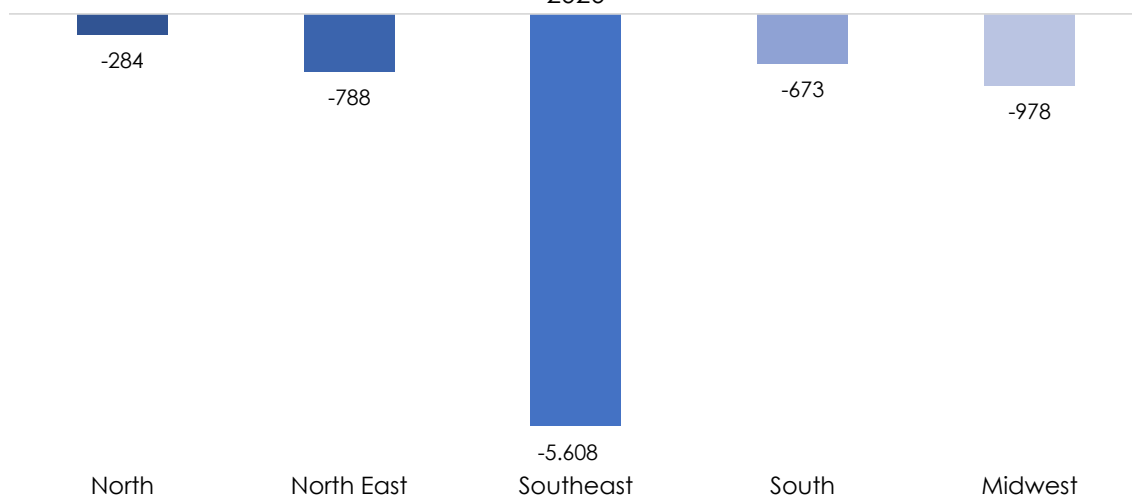
-284	-788	-5.608	-673	-978
North	North East	Southeast	South	Midwest

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed (CAGED) and Annual Social Information Report (RAIS).

MOBILITY AND CONNECTIVITY
## Conjuncture of Nautical Tourism and Cruise Ships

Currently, the Technical Group (GT) of Tourism in Water is in progress, within the scope of the Tourism Mobility and Connectivity Forum. The GT produced the document entitled "Base Text for Discussion", containing an overview of Water Tourism, which includes the subjects of Nautical Tourism (Cruises and Sport and Recreation), Sun and Beach Tourism, Fishing Tourism and Adventure Tourism (Ecotourism).

The document provides an overview of the topic, covering information on Brazilian potential, development possibilities, conceptual aspects, benefits, tourism chain involved, tourist profile, reasons for choosing the destination, main destinations by activities, investments in tourism infrastructure, credit support for the private sector, Ministry of Tourism Investment Portal, *Vade Mecum*, studies and plans, databases and official systems.

In addition, the Basic Text for Discussion presents the following special topics for development: Review of the National Maritime Policy; Nautical support structures and facilities; Import of vessels; Tax burden reduction, nautical cruise tourism and underwater visitation centers and artificial reefs.

The River Passenger Transport takes place in a network estimated at 25,000 km of navigable rivers in the Amazon Basin. This is mostly used by locals but also for tourist purposes. The evolution of passengers from 2011 to 2017 is presented below.

Graph 19: Evolution in the estimation of passenger transport in river transport in the Amazon region, based on field surveys (million passengers)
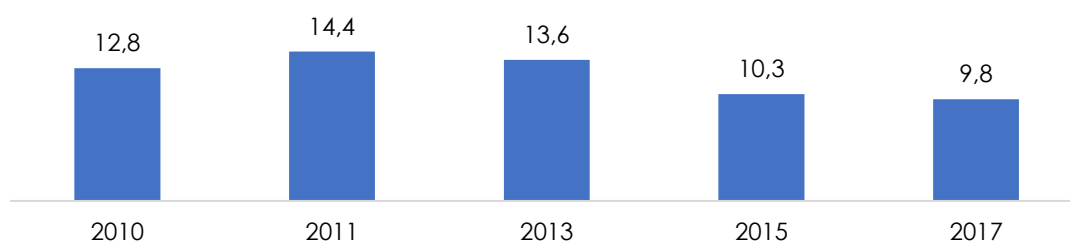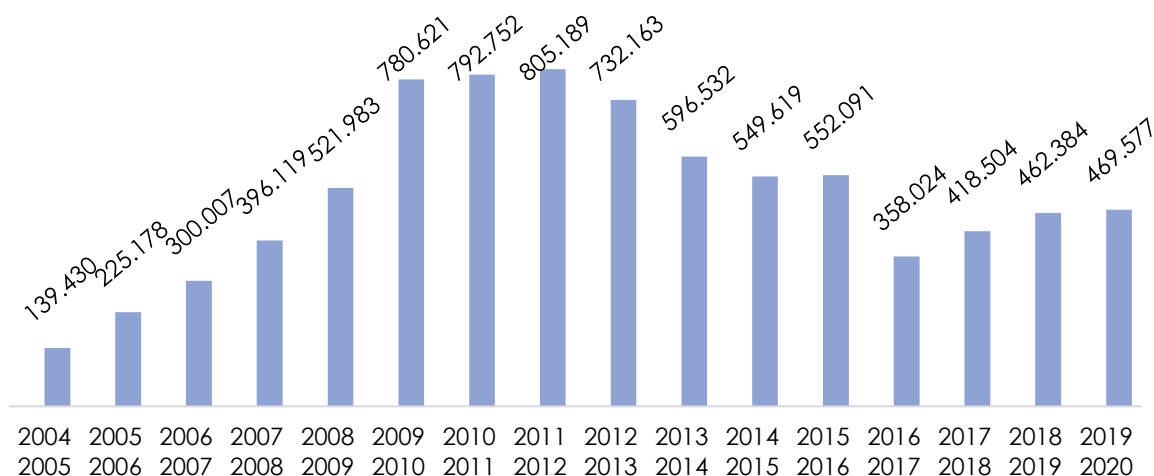

Data source: CGMob/ LabTrans, 2021

The number of passengers embarked on cruises has been growing steadily between 2004 and 2011, peaking in the 2011/2012 season. After this, it dropped until 2016-2017 and started to grow again until 2020.

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MOBILITY AND CONNECTIVITY
## Conjuncture of Nautical Tourism and Cruise Ships

Graph 20: Number of passengers boarded on cruises, 2004 to 2020

2004 2005	2005 2006	2006 2007	2007 2008	2008 2009

Data source: CGMob/ LabTrans, 2021

Regarding the number of ships used per season, the evolution of growth is similar to that of embarked passengers, with the exception that the number remained stable between 2014 and 2016 and 2017 to 2019.

Graph 21: Number of ships used per season, 2004 to 2020
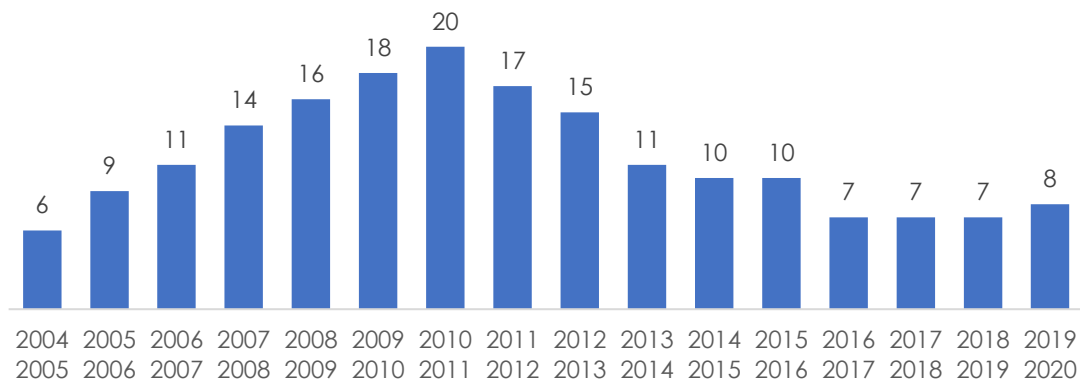
Data source: CGMob/ LabTrans, 2021

According to the International Cruise Association – CLIA Brazil, among cabotage cruise travelers in the country, the majority are Brazilians engaged in domestic tourism. The sector is very attractive to Brazilians due to its service characteristics and possibilities to visit several destinations in the same trip.

Also, according to the association, the number of tourists residing in Brazil who took cruise trips abroad during 2019 was 217,313, which meant an increase of 11.3% compared to 2018, generating revenue of R$ 703.9 million (23.5% more than in 2018). Mediterranean and Caribbean were the

main destinations of choice for Brazilians who traveled abroad to take maritime cruises.

Thus, the 2019/2020 Brazilian season registered **8 ships, 144 cruises performed, 28,730 beds and 7,869 crew members.** The average cruise time was **5,2 days**, and the average expense per passenger with the purchase of the trip reached **R$ 3,256.27.** The total economic impact is **R$ 2,240 billion, between expenses incurred by shipping companies and the consumption of cruise passengers and crew at destinations.**

In relation to ships passing through the Brazilian coast, there **24 boats** from **18 different companies**, covering **29 destinations**. **32,053 beds** were offered, with **12,520 crew** and **224 days.**

Among cruise passengers who would undertake domestic (cabotage) and/or international trips, more than 30,000 people dropped out due to the Covid-19 pandemic (until the survey was carried out). This generated an estimated loss of revenue for the companies of more than R$70 million. **The profile of cruisers** is presented below. – research conducted by CLIA Brazil.
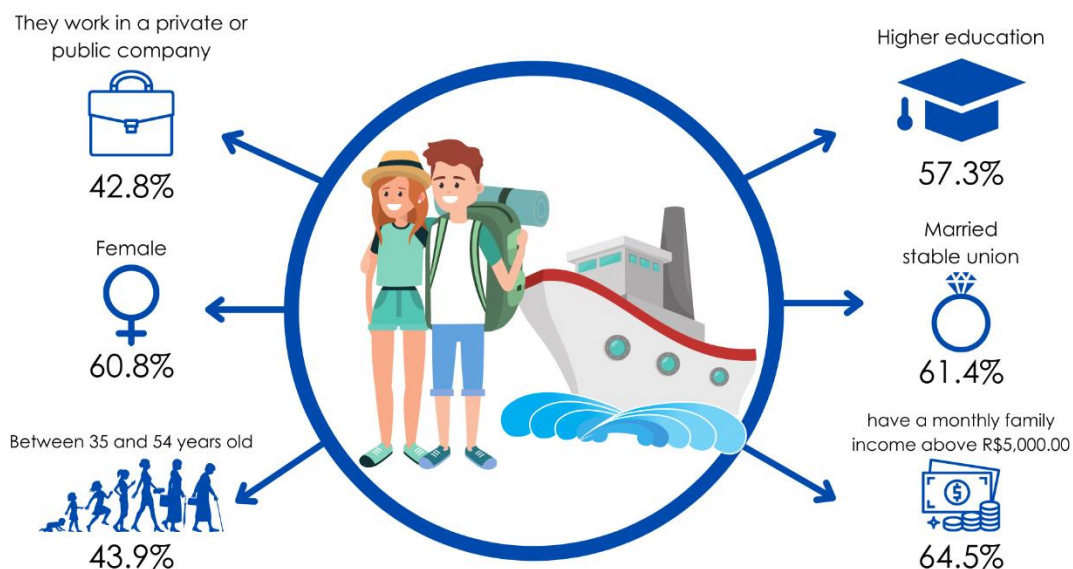
Data source: CLIA Brasil/ FGV, 2021

MOBILITY AND CONNECTIVITY
Conjuncture of Nautical Tourism and Cruise Ships

The Market Intelligence Bulletin in Tourism – Nautical Tourism, published by Rede de Inteligência de Mercado no Turismo – RIMT/MTur, presents a new panorama of Nautical Tourism in the country, highlighting the offer of the segment in Brazil. The main Brazilian public ports and priority nautical activities, contained in the aforementioned document, are presented below.
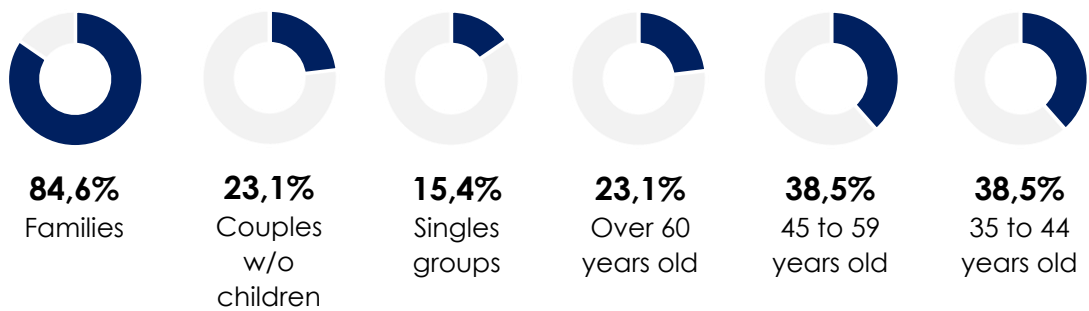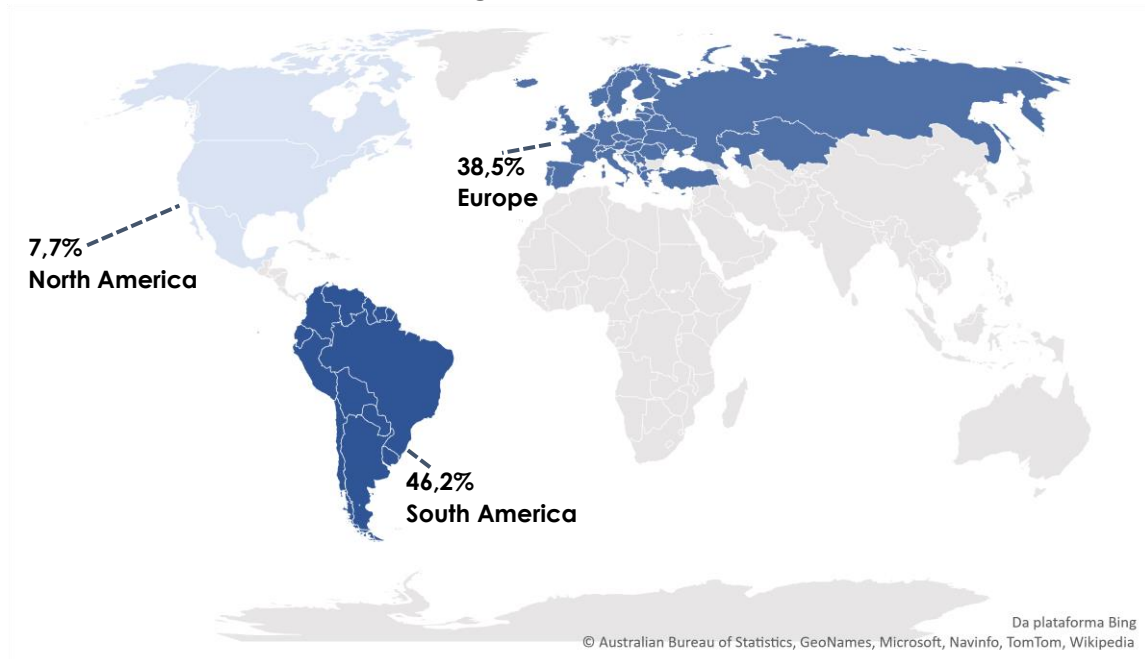

Data source: Survey with RIMT/MTur members and Braztoa associates.

Demand and trends in Nautical Tourism are also presented, identifying the main issuing states, the origin of the clients and the profile of the consumer public, according to the Graphs presented below:

MOBILITY AND CONNECTIVITY
Conjuncture of Nautical Tourism and Cruise Ships

Origin of customers

38,5%
Europe

7,7%
North America

46,2%
South America

Da plataforma Bing
© Australian Bureau of Statistics, GeoNames, Microsoft, Navinfo, TomTom, Wikipedia

84,6%
Families

23,1%
Couples
w/o
children

15,4%
Singles
groups

23,1%
Over 60
years old

38,5%
45 to 59
years old

38,5%
35 to 44
years old

Tendencies

Acquisition and rental of boats for family leisure

Events that promote drive-in-style cinema sessions on boats

Sharing vessels through the acquisition of quotas for the use of boats and jet-skis by appointment in specific applications

Vessel rental by applications and platforms. Examples available in the Brazilian market: Nautal, Yatchnet, Click and Boat, Wind Charter, Entre Ilhas etc.

Teleworking on vessels with 4G Internet and Wi-Fi

Data source: Survey with RIMT/MTur members and Braztoa associates

Work and Employment in Water Transportation

Water Transportation accounts for only 1% of federal tax collection in the tourism economy. Even so, between 2019 and 2020, it was the Characteristic Tourism Activity (ACT) that showed the greatest percentage change in revenue, with a growth of 32.7%. The positive results came only from the South region, with an increase of 131.8%, with all other macro-regions reporting a decline. In addition to this ACT, the only other that had an increase in federal collection was Transport Rental, but in a timider way, with growth of 6%, as shown in Graph 22, presented below.

Graph 22: Percentage Change of Federal Revenue, by ACT, 2020/2019
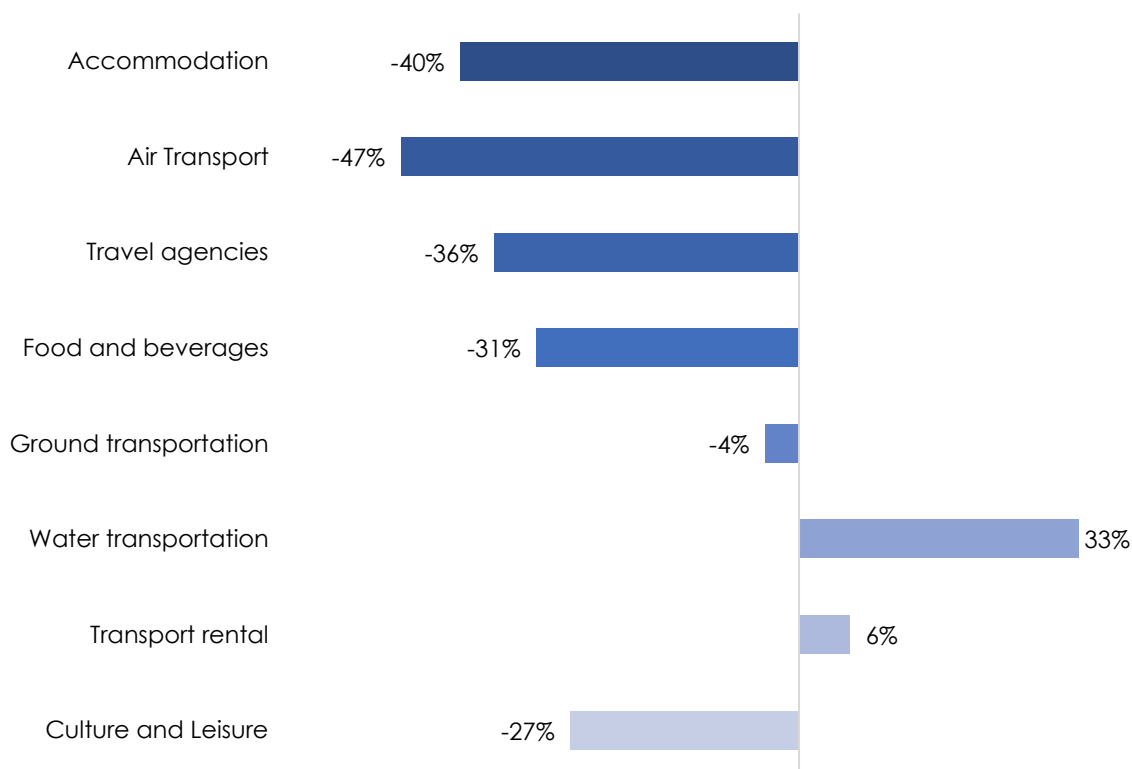
Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

In relation to Water Transportation, in 2020, there was a reduction of jobs in the first seven months of the year. 1,495 posts were closed until July. On the other hand, between August and December, 423 vacancies were opened, representing a recovery of 28.3%.

MOBILITY AND CONNECTIVITY
Conjuncture of Nautical Tourism and Cruise Ships

Graph 23: Balance of Hirings and Dismissals at Water Transportation ACT, by macro-region, 2020
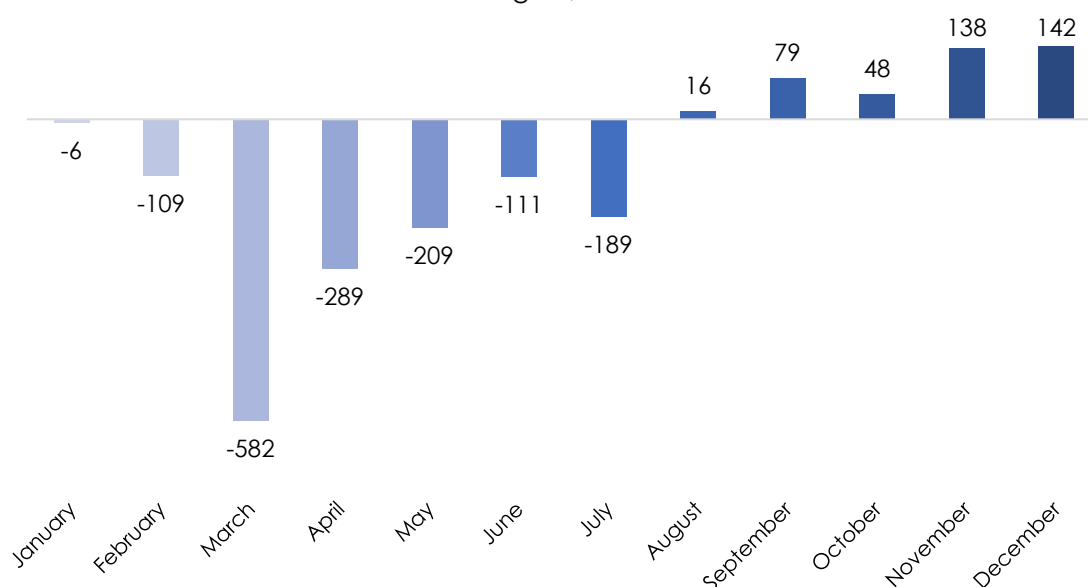

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

All macro-regions reported layoffs in 2020, with the least impacted being the Southeast and Midwest. The biggest impact occurred in the North region.
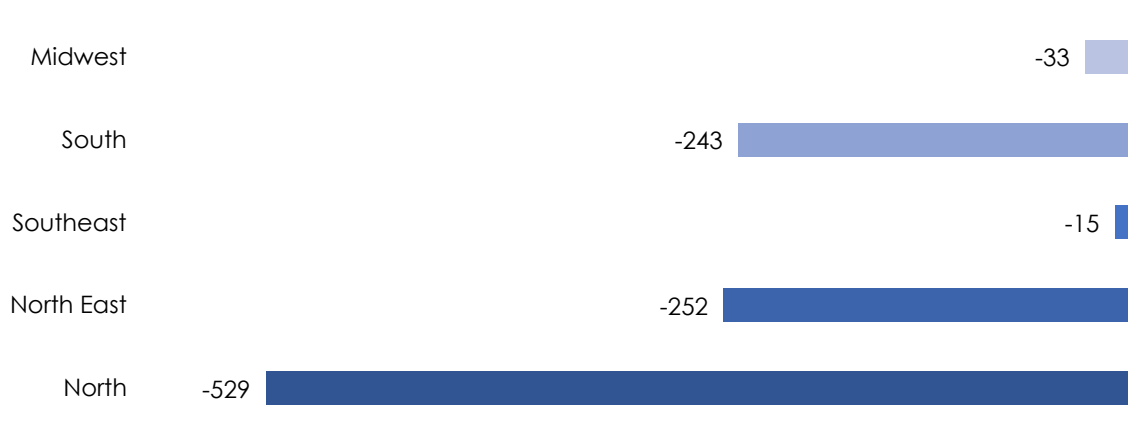
Graph 24: Balance of Hirings and Dismissals at Water Transportation ACT, by macro-region, 2020

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

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MOBILITY AND CONNECTIVITY
Land Transport Conjuncture
Passenger Road Transport

Land Transport represents about 30% of the total passenger transport in the country, as shown in Statistical Yearbook of Tourism 2020. According to LabTrans, the country's road network is 73,100 km long, with 64,000 km of paved roads and 9,100 km of unpaved roads. Another 47,500 km of highways are planned. The road transport of passengers, in 2019, had revenues of BRL 187,230,000.00, and in 2020 the turnover reached BRL 123,780,000.00, a drop of 33.89%. Billings per service offered are divided as follows:

Road passenger transport - Billing per service			
	2019	**2020**	**Difference**
Conventional with toilet	R$ 117.030.000,00	R$ 66.760.000,00	-R$ 50.270.000,00
Executive	R$ 59.300.000,00	R$ 40.570.000,00	-R$18.730.000,00
Bed with air conditioning	R$ 5.500.000,00	R$ 9.390.000,00	R$ 3.890.000,00
Semi-Bed	R$ 5.120.000,00	R$ 6.620.000,00	R$ 1.500.000,00
Conventional without sanitary	R$ 280.000,00	R$ 440.000,00	R$ 160.000,00
Total	R$ 187.230.000,00	R$ 123.780.000,00	

Data source: CGMob and ANTT (2021). Data obtained on: July/2021.

In terms of tickets sold, the main category is conventional transport with a toilet. This modality represented 57% of the total sales volume in 2020, that is, 57% of the total. Between 2019 and 2020, there was a 25.5% drop in ticket sales. The categories whose sales volume increased were Semi-bed and Bed with air conditioning. For the overall sum of the segments, the loss of the average ticket was 12.69%, having fallen from R$7.46 per passenger to R$6.62.

Road passenger transport - Number of tickets per service			
	2019	**2020**	**Difference**
Conventional with toilet	17,1 mi	10,7 mi	-6,4
Executive	6 mi	5,6 mi	-0,4
Semi-Bed	1,1 mi	1,4 mi	0,3
Bed with air conditioning	0,6 mi	0,8 mi	0,2
Conventional without sanitary	0,3 mi	0,2 mi	-0,1
Total	25,1 mi	18,7 mi	

Data source: CGMob and ANTT (2021). Data obtained on: July 2021.

The regulation of the provision of interstate and international collective road transport of passengers carried out under a charter regime is given by ANTT Resolution No. 4,777, of July 6, 2015.

MOBILITY AND CONNECTIVITY
Land Transport Conjuncture

The service under charter can be performed in the following ways:

- Touristic;
- Eventual; and
- Continuous.

To provide this type of service, the interested carrier must apply for a Charter Authorization Term (TAF), which is the instrument that entitles a carrier to provide the service and issue the tourist charter travel license, whether occasional or continuous.

Work and Employment in Land Transport

ACT Transport ranges from activities such as taxi road transport to collective road transport of passengers. The sector suffered a drop of 24,924 jobs in 2020, according to data from the Ministry of Economy's CAGED. Due to the restrictions imposed by the health crisis in March 2020 and the consequent drop in passenger traffic, the month of April was the one with the largest negative balance of contracts, totaling 11,945 casualties. A modest recovery only began in December of the same year, with the **opening of 2,372 new jobs**[4].

Graph 25: Monthly balance of Hirings and Dismissals at ACT Transport Land, per month, 2020
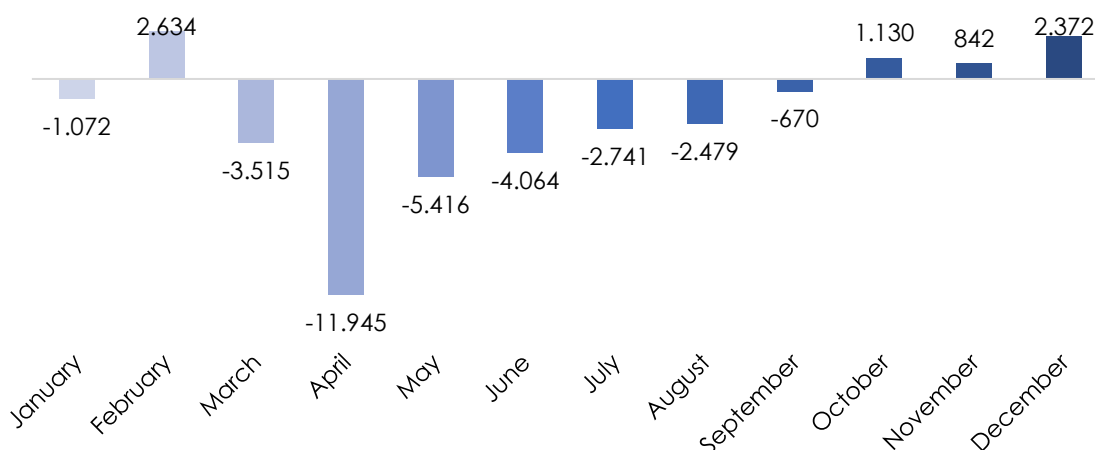
Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

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[4] Revista Dados e Informações, CGDI/MTur, A1, 2ª edição, junho de 2021.

MOBILITY AND CONNECTIVITY
Land Transport Conjuncture

The largest number of layoffs by macro-region in 2020 was in the Southeast, with 13,505 jobs closed. Then, the South and Northeast, with 4,841 and 3,949, respectively. The region with the fewest layoffs was the North, with 933 casualties, as shown in **Graph 26**, presented below.

Graph 26: Balance of Hiring and Dismissals in ACT Land Transport, by macro-region, 2020

Region	Value
Midwest	-1.696
South	-4.841
Southeast	-13.505
North East	-3.949
North	-933

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

The Transport Rental is an ACT that has its market divided between residents and tourists. Along with Water Transportation, which was one of the two sectors that had an increase in the Federal Revenue in 2020, compared to 2019, as shown in the **Graph 27.**

The sector registered growth in all macro-regions, with emphasis on the South and Northeast regions, where collections rose by more than 25%. In relation to jobs in the sector, only the South region registered a negative balance. The greatest growth occurred in the Southeast, with 2,289 new jobs.

Graph 27: Balance of Hirings and Dismissals in ACT Transport rental, by macro-region, 2020

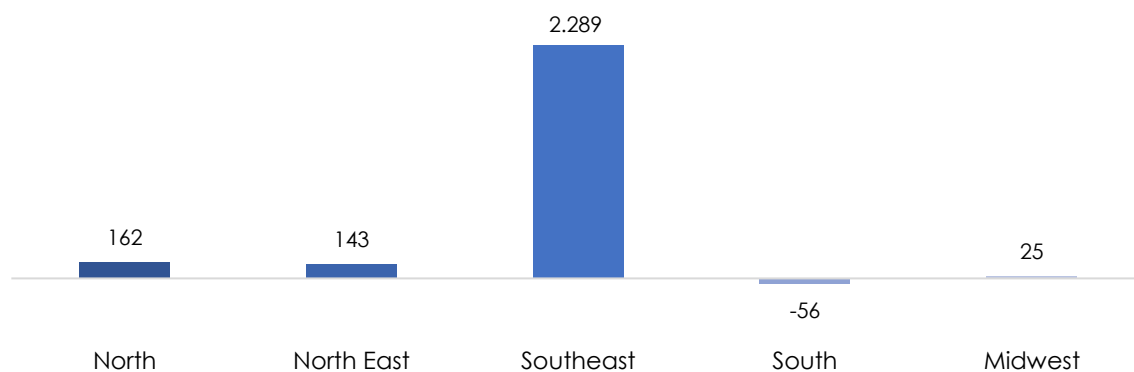| Region	Value
North	162
North East	143
Southeast	2.289
South	-56
Midwest	25

Data source: CGDI/MTur, Ministry of Economy - General Register of Employed and Unemployed Persons (CAGED) and Annual Social Information Report (RAIS).

MOBILITY AND CONNECTIVITY
Land Transport Conjuncture
Tourist Trains

The <u>ANTT Resolution No. 359, of November 26, 2003</u>, establishes procedures related to the operation of tourist, historical-cultural and commemorative trains. Trains with touristic and cultural-historical purposes are characterized by contributing to the preservation of the historical heritage and memory of the railways and by their continued operation throughout the year.

Currently, Brazil has **24 lines of tourist and commemorative trains, which add up to more than 2,170 km in length**. The state with the largest extension is **Mato Grosso do Sul, with 40%, distributed over two lines**. Commemorative trains are characterized by the realization of specific and isolated events. In these cases, authorizations are issued to carry out rail transport on specific dates and lose their validity after the respective events are held.

The list of tourist and cultural-historical trains whose transport was authorized by ANTT, pursuant to the aforementioned resolution, is presented below:

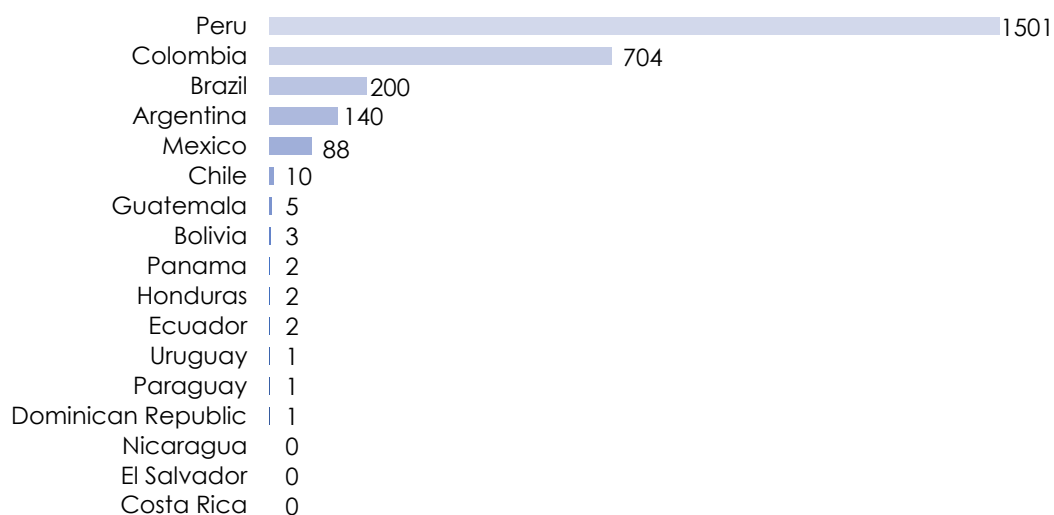| Line	Federation Unit	Extension	Section Holder/ Concessionaire
Estação de Viana/ Estação de Araguaia	Espírito Santo	46 km	
Campo Grande/ Indubrasil a Corumbá	Mato Grosso do Sul	441 km	
Campo Grande/ Corumbá	Mato Grosso do Sul	459,58 km	
São João Del Rei/ Tiradentes	Minas Gerais	12 km	DNIT
São Lourenço/ Soledade de Minas	Minas Gerais	10 km	
Passa Quatro/ Coronel Fulgêncio	Minas Gerais	10 km	
Ouro Preto/ Mariana	Minas Gerais	18 km	
Ponta Grossa/ Guarapuava/ Cascavel	Paraná	505 km	
Morretes/ Antonina	Paraná	17 km	
Curitiba/ Morretes	Paraná	68 km	Rumo Malha Sul S.A.
Paraíba do Sul/ Cavaru	Rio de Janeiro	14 km	
Bento Gonçalves/ Carlos Barbosa	Rio Grande do Sul	48 km	
Rio Pardo/ Cachoeira do Sul	Rio Grande do Sul	56 km	
Montenegro/ Guaporé/ Estrela	Rio Grande do Sul	106 km	
Tubarão/ Imbituba/ Urussanga	Santa Catarina	159 km	Ferrovia Teresa Cristina S.A.
Rio Negrinho/ Rio Natal/ Corupá	Santa Catarina	59 km	Rumo Malha Sul S.A.
Piratuba/ Marcelino Ramos	Santa Catarina	26 km	Rumo Malha Sul S.A.
Brás/ Mooca	São Paulo	3 km	MRS Logística S.A.
Campinas/ Jaguariúna	São Paulo	25 km	
Assis/ Paraguaçu Paulista/ Quatá	São Paulo	60 km	
Paranapiacaba	São Paulo	304 km	
Rio Grande da Serra/ Paranapiacaba	São Paulo	12 km	
São José do Rio Preto/ Eng. Schmitt	São Paulo	105 km	
Guararema/ Luiz Carlos	São Paulo	55 km	MRS Logística S.A.

Data source: CGMob and ANTT, 2021

MOBILITY AND CONNECTIVITY
Land Transport Conjuncture

The only market not led by Brazil (in Latin America) is rail transport, in which the country occupies the third position in the ranking, behind Peru and Colombia.

Graph 28: Number of companies in rail transport in Latin America, 2021

Country	Value
Peru	1501
Colombia	704
Brazil	200
Argentina	140
Mexico	88
Chile	10
Guatemala	5
Bolivia	3
Panama	2
Honduras	2
Ecuador	2
Uruguay	1
Paraguay	1
Dominican Republic	1
Nicaragua	0
El Salvador	0
Costa Rica	0

Data source: fDi Markets, 2021

For more information, contact: mobilidade@turismo.gov.br.

MOBILITY AND CONNECTIVITY
Partnerships and Concessions

The Investment Partnership Program (PPI) was created, under the Presidency of the Republic, by Law No. 13.334, of 2016, with the purpose of expanding and strengthening the interaction between the State and the private sector through the signing of partnership contracts and other privatization measures. In it, ports, airports and highways are being offered across the country. Below is a summary table of opportunities:

Project	Sector	Model	Investment (CAPEX)	Deadline
6th Round of Airport Concessions - South, North I and Central Blocks	Airports	Common Concession	R$ 6.130.000.000,00	30 years
7th Round of Airport Concessions - RJ/MG, SP/MS and Norte II Blocks (16 Airports)	Airports	Common Concession	R$ 5.280.000.000,00	
PPP Regional Airports - Amazonas Block	Airports	Public-private partnership	R$ 380.000.000,00	10 years
Revitalization of the airport of Viracopos, Campinas /SP	Airports	Common Concession		
Requisition of the São Gonçalo do Amarante/RN airport (ASGA) in Natal/RN	Airports	Common Concession	R$ 230.000.000,00	
Brazilian Company of Urban Trains (CBTU)	Urban mobility	Privatization		
Urban Train Company of Porto Alegre S.A. (Trensurb)	Urban mobility	Privatization		
Line 2 of the subway in the metropolitan region of Belo Horizonte/MG	Urban mobility	Common Concession		
Cabotage Incentive Policy (BR do Mar)	Ports	Development Policy		
Maritime Passenger Terminal at the port of Mucuripe/CE	Ports	Lease	R$ 1.600.000,00	25 years

Data source: Programa de Parcerias e Investimentos

MOBILIDADE E CONECTIVIDADE
Partnerships and Concessions

7th Airport Concession Round

Airport	Location	Municipalities on the Tourist Route	Installed capacity (pax/year)	Movement (pax/year) 2019	ANAC classification	PAN classification	Number of lanes	Critical aircraft	Regular flights
Campo Grande	Campo Grande - MS	South and Bonito Pantanal Route: 7 municipalities	1.600.000	1.520.000	Capital airport	Midsize	1	4c	Domestic
Corumbá	Corumbá-MS	Pantanal Sul and Bonito Routes: 7 municipalities	900.000	28.150	Other public aerodromes	Local	1	4c	-
JÚLIO CEZAR RIBEIRO (VAL DE CANS)	Belém, PA	Routes Belém, Santarém-Alter do Chão, Ilha do Marajó: 5 municipalities	7.700.000	3.590.000	Capital airport	Primary Metropolitan	2	4E	Domestic
MAESTRO WILSON FONSECA	Santarém, PA	Routes Belém, Santarém-Alter do Chão, Ilha do Marajó: 5 municipalities	1.830.000	490.740	Other public aerodromes	Small Size	1	4C	Domestic
ALBERTO ALCOLUMBRE	Macapá, AP	Macapá Route: 1 municipality	2.100.000	608.600	Capital airport	Midsize	1	4C	Domestic
SANTOS DUMONT	Rio de Janeiro, RJ	Rio de Janeiro Imperial Route: 4 municipalities	9.900.000	23.100.000	Capital airport	Large	2	4C	Domestic
PROFESSOR URBANO ERNESTO STUMPF	São José dos Campos, SP	São Paulo and North Coast Routes: 6 municipalities	2.700.000	38.400	-	Local	1	-	-
CONGONHAS	São Paulo, SP	São Paulo and North Coast Routes: 6 municipalities	17.100.000	22.830.000	Capital airport	Large	2	4C	Domestic

Data source: Partnership and Investment Program

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