

Brazil

Tourism in the economy

Tourism in Brazil accounts directly for 3.7% of GDP, rising to 9.6% if indirect effects are also included. The sector supported in excess of 2 million jobs in 2016 (down 1.7% from 2015), accounting for 2.4% of total employment.

In 2016, international tourist arrivals reached a record of 6.6 million, representing an increase of 4.3% on the previous year, and generating total revenue of USD 6 billion (up 3.7%). Argentina, was by far the largest source market with 2.3 million visitors (34.9% of the total), followed by the United States (8.7%), Paraguay (4.8%), Chile (4.7%) and Uruguay (4.3%). The five primary source markets demonstrated varying levels growth from 2015, apart from the United States, which experienced a very slight contraction of approximately 1%.

With over 206 million trips in 2015, the domestic market has high potential for growth. 90% of Brazilians will choose domestic destinations for their next vacation, including carnival and summer breaks. The main destinations are the Northeast, followed by the Southeast and South regions.

Tourism governance and funding

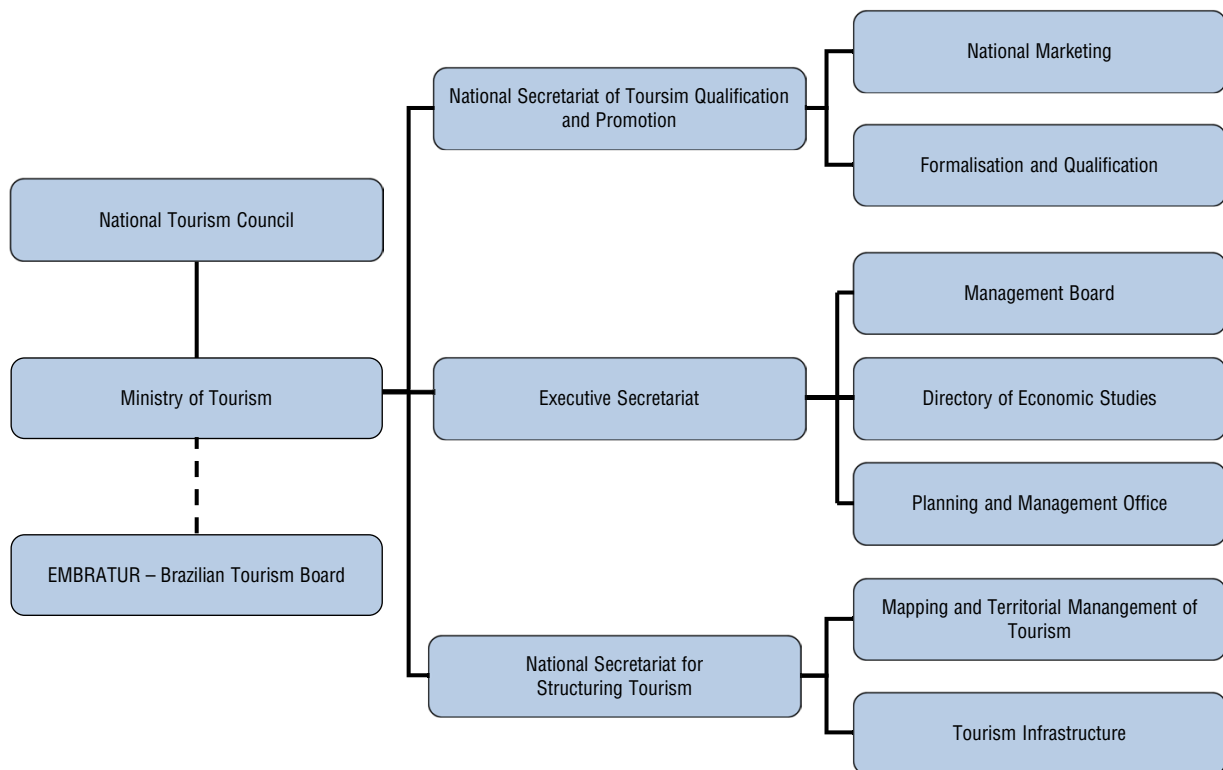
Since 2003 the Ministry of Tourism (MTur) has overseen a process of decentralisation towards a shared management structure for tourism built upon a network of engagement and activity with public, private and third sector actors, throughout the country.

This model consists of a national strategic core including:

- The Ministry of Tourism,
- The National Council of Tourism (CNT), which is responsible for strategic direction and bringing together the various actors,
- The National Forum of State Secretaries and Directors of Tourism (FORNATUR), and
- A decentralised management network composed of Regional Governance Bodies.

The State Tourism Boards and Councils, created in the 27 Federation Units, are legally independent management bodies, promoting efficient communication in the different tourist regions of the country. They also serve as important instruments to support activities that benefit tourism, providing continuity over time.

Reflecting the high priority given to tourism by the Federal Government, the 2017 general budget for tourism in Brazil was BRL 672 million (down 9.7% on 2016). In addition to the Federal Government, funding is received from other sources, including national and international aircraft boarding fees.

Brazil: Organisational chart of tourism bodies

Source: OECD, adapted from the Ministry of Tourism, 2018.

Tourism policies and programmes

The National Tourism Plan 2013-16 continues to be a reference point for public sector tourism policy. Its focus is on the development of tourism that is economically sustainable, environmentally balanced and socially inclusive.

Despite efforts to promote sustainable growth in the tourism sector, Brazil is still far from achieving its goals of social equity and respect for the environment. One of the biggest challenges is to raise awareness in the private sector about the importance of sustainable development as a way to protect the environment, improve the economy and provide accessibility for all.

In April 2017 the Ministry of Tourism launched “Brazil + Tourism”, a package of measures to strengthen the industry in Brazil. This initiative aims to:

- Bring technical solutions to historical bottlenecks,
- Increase the number of domestic and foreign tourists,
- Improve domestic destinations,
- Provide regional development, and
- Generate employment and income.

The primary strategic initiatives to boost tourism in Brazil are:

- Issuing Electronic Visas. The MTur has proposed to the Ministry of Foreign Relations that the use of electronic visas be applied to certain strategic countries, thereby making the process, which is accessible online, much easier, quicker and less bureaucratic.

- Expanding air connectivity. Amendment of the Brazilian Aeronautical Code will raise the limit on foreign investment in the capital of Brazilian airlines to 100%. The objective is to increase competitiveness and the number of flights and tourists travelling within the country, in addition to extending the regional air network to facilitate the spread of national and international visitors.
- Modernising the Brazilian Tourist Promotion Agency, EMBRATUR. Changes will enable the Agency to: act more competitively in the international tourism marketplace; receive private resources for the development of projects of mutual interest, with reduced bureaucracy; modernise its management; and maintain a structure of offices and personnel abroad.
- Modernising the General Tourism Law (LGT). 118 proposals for changes in General Tourism Law have been submitted to the National Congress. The goal is to adapt the Brazilian tourism legislation to the current dynamics of tourist activity, reducing bureaucracy and improving integration with the private sector.
- Achieving better use of certain areas of the Union. The Ministry of Tourism will strengthen tourism management, regulation and concessions in locations with tourism development potential.
- Updating the Brazilian Tourism Map. A process, undertaken every two years, to improve the organisation in the municipalities and regions and their orientation to tourism, linked to the receipt of federal resources. In the last update in 2016, the number of municipalities was rationalised to 2 175 in 291 tourist regions (down from 3 345 in 2013).
- Strengthening State Tourism Agencies. This involves the transfer of BRL 5.4 million for State Tourism bodies, allocated to reflect the restructure of tourist regions of the Brazilian Tourism Map. The measure will allocate resources to integrated development plans for sustainable tourism and marketing, amongst other activities.
- Intensifying surveillance of tourist transport on Brazil's highways, through technical co-operation with the National Agency of Terrestrial Transportation (ANTT).
- Strengthening professional qualifications. Programs at different levels have been established to address the need to improve the availability of skilled labour and quality of service. For example, as part of a package of measures called "Brazil + Tourism" to boost the development of tourism in the country, an important element was a programme to provide practical skills training for young people and adults to improve the quality of service for tourists (Box 1.21).

Statistical profile

Table 1. Brazil: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	5 677	5 813	6 430	6 306	6 578
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Argentina	1 672	1 711	1 744	2 080	2 295
United States	586	593	657	576	570
Paraguay	246	269	294	302	317
Chile	251	268	337	306	312
Uruguay	254	263	224	267	284
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	8 497	8 864	9 617	9 711	8 485
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
United States	1 791	2 060	2 264	2 219	1 394
Argentina	1 217	973	1 082	963	763
Portugal	479	504	562	533	510
Spain	410	392	441	534	501
France	501	521	481	506	499
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	6 623	6 784	7 404	6 254	6 024 e
International travel receipts	6 378	6 474	6 843	5 844	6 024 e
International passenger transport receipts	245	310	562	410	..
Outbound tourism					
Total international expenditure	26 007	29 287	29 998	20 356	14 497 e
International travel expenditure	22 039	25 028	25 567	17 357	14 497 e
International passenger transport expenditure	3 969	4 258	4 431	2 999	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933641583>


Table 2. **Brazil: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed ¹				
	2016	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	254 566 p	2 059 715	1 938 890	2 046 469	2 079 450	2 043 162 p
Accommodation services for visitors	29 616 p	301 927	320 265	341 700	346 472	334 357 p
Hotels and similar establishments	..	..	..	..	..	..
Food and beverage serving industry	183 428 p	1 118 993	1 009 078	1 083 971	1 124 364	1 124 837 p
Passenger transport	14 539 p	468 856	442 174	447 369	433 893	413 623 p
Air passenger transport	672 p	61 780	59 637	61 702	58 824	52 177 p
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	13 308 p	400 621	375 510	378 875	368 876	355 358 p
Water passenger transport	559 p	6 455	7 027	6 792	6 193	6 088 p
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	5 448 p	32 973	34 791	40 734	44 515	42 851 p
Travel agencies and other reservation services industry	12 077 p	102 008	98 012	96 871	92 745	89 195 p
Cultural industry	9 458 p	34 958	34 570	35 824	37 461	38 299 p
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; p Provisional data

1. Data refer to number of jobs.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933641602>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:

<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), “Brazil”, in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-43-en>

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