# Market and Trade Profile: Brazil

Brazil – February 2020

# Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Brazilian travellers and who they are. It compares Britain with its competitive set as well as activities of Brazilian visitors in the UK.
- **Chapter 2: Experiences and perceptions** features details about what visitors from Brazil are likely to do in the UK, how they felt during their visit and whether they would recommend others to travel there. Perceptions of Britain held by Brazilians are also highlighted.
- **Chapter 3: Understanding the market** profiles Brazilian consumer trends, booking patterns, how they plan travel and additional travel behaviour.
- **Chapter 4: Market access and travel trade** highlights how Brazilians travel to the UK, how suppliers can best cater to the market during their stay as well as offer insights on how to work with Brazilian travel trade. Additional ways of working with VisitBritain in Brazil and useful research resources are also shared.

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# Executive summary

# 1: Inbound market statistics

## Chapter summary

Brazil's outbound travel market is forecasted to account for 15.4 million trips by 2028. This is an increase of 35% compared to 2018 figures.

France (44%), Italy (38%), Germany (37%), Portugal (36%) and Spain (35%) were the holiday destinations that Brazilian holidaymakers to Britain were most likely to consider as alternative destiations to visit.

Brazilians rank in 19th place for international tourism expenditure with more than US$18.3bn spent in 2018.

Brazil was the 29th largest inbound source market for the UK for both volume and value in 2018 and largest from Latin America.

92% of departing Brazilian holidaymakers are 'extremely likely' to recommend Britain for a holiday or short break.

London is the leading destination for Brazilian visitors; 61% of Brazilian nights were spent in London between 2016-2018.

**Visits from Brazil to the UK were up 23% in the first nine months of 2019***

*Source: International Passenger Survey by ONS, *IPS 2019 is provisional until full annual release May 2020, VisitBritain/IPSOS 2016, Oxford Economics, UNWTO*

# 2. Experiences and perceptions

## Chapter summary

Top activities by Brazilian visitors to the UK include dining in restaurants, shopping and going to a pub.

More than half of Brazilian visitors go to parks/gardens, museums/art galleries and sightsee famous monuments/buildings. They are more likely to do all these activities compared to the average UK visitor.

Brazilians ranked Britain 8th out of fifty nations for Culture, 11th for Tourism and 13th for People. They ranked Britain highly for vibrant cities (7th) and contemporary culture (8th) but less so for natural beauty (28th).

87% of departing Brazilian travellers are either 'very' or 'extremely' likely to recommend a visit to the UK for friends and family.


*Source: International Passenger Survey by ONS, Anholt Nation Brands Index powered by Ipsos 2019*

# 3.Understanding the market

## Chapter summary

Brazil's population reached 211 million in 2019, with only 9% aged more than 65 years-of-age.

Brazil‘s economy, along with its outbound travel market, has been in recovery since the 2015/2016 recession. Brazil’s outbound market is forecasted to grow by 18% within the next five years.

Almost two thirds of Brazilian holiday visitors start thinking about their trip to Britain early; more than half a year in advance. 37% of Brazilian travellers booked their trip to Britain three to six months before their arrival.

More than half of Brazilian travellers to Britain book travel and their accommodation together, with 61% doing so online.

Word-of-mouth, websites providing traveller reviews and information from search engines influence the destination choices of Brazilians.

About 149 million Brazilians use the internet, equating to 70% of the Brazilian population – of this figure, 85% use the internet daily.

**Brazil’s outbound travel market is forecasted to grow by 18% in 2019-2024.**

*Source: Oxford Economcis, VisitBritain/IPSOS 2016, Insights West, Hootsuite*

# 4. Access and travel trade

## Chapter summary

77% of Brazilian visitors to the UK were made by plane in 2018.

Seat capacity has recovered since the 2015/2016 recession. In 2019, annual seat capacity reached 381,810 seats.

British Airways (São Paulo GRU and Rio de Janeiro GIG) and LATAM Airlines (São Paulo GRU) serve non-stop routes to London Heathrow (LHR). Norwegian launched flights between Rio de Janeiro (GIG) and London Gatwick (LGW) in March 2019.

Other European carriers such as Air Europa, Air France, Iberia, KLM, Lufthansa and TAP Portugal offer one-stop connections to Britain.

Virgin Atlantic will launch daily service to London Heathrow (LHR) from São Paulo Guarulhos (GRU) in March 2020.

Brazil's travel trade sector consists predominantly of travel agencies that sell packages or bespoke itineraries, paired with the many products provided by tour operators.

Portuguese is the official language in Brazil. Only approximately five percent of Brazilians speak English.

**Seat capacity**

from Brazil to the UK increased by 15% in 2019.

*Source: Apex 2019, non-stop flights only,*

# Chapter 1:
# Inbound market statistics

# Chapter 1.1: Key statistics

## Key insights

Brazil is the #1 Latin America inbound market for the UK.

In 2018, the UK welcomed 240,000 visits from Brazil with these visitors spending £215m.

Brazilians have the tendency to visit all throughout the year. In 2018, 31% of visits were in Q1 followed by 26% in Q3.

Holiday visits continue to lead the volume of arrivals from Brazil; 60% of visits were made for holiday purposes in 2018.

Brazilian visitors spent an average of 8 nights per visit in the UK during 2018, 1 night longer than the global average.

London is the leading destination for Brazilian visitors; 61% of Brazilian nights were spent in London between 2016-2018.

36% of holiday visits from Brazil to the UK (excl. nationals) in 2015 were made by repeat visitors.

In 2018, 8% of Brazilian visits were bought as part of a package or all-inclusive tour, aligning with the all-market average.

**60%**
of visits were made for holiday purposes in 2018

*Source: Oxford Economics, International Passenger Survey by ONS*

# 1.1 Key statistics: global context and 10 year trend

## Global context

| Measure | 2018 |
|---|---|
| International tourism expenditure (US$bn) | 18.3 |
| Global rank for international tourism expenditure | 19 |
| Number of outbound overnight visits (m) | 11.4 |
| Most visited destination | USA |
| Most visited European destination | Portugal |

## Inbound travel to the UK overview

| Measure | Visits (000s) | Nights (000s) | Spend (£m) |
|---|---|---|---|
| **10 year trend** | | | |
| 2008 | 179 | 2,490 | 148 |
| 2009 | 151 | 2,249 | 151 |
| 2010 | 177 | 1,764 | 160 |
| 2011 | 276 | 2,652 | 302 |
| 2012 | 260 | 2,401 | 227 |
| 2013 | 258 | 2,283 | 277 |
| 2014 | 293 | 2,878 | 253 |
| 2015 | 324 | 2,786 | 256 |
| 2016 | 187* | 2,006* | 196* |
| 2017 | 244 | 2,596 | 263 |
| 2018 | 240 | 1,993 | 215 |
| **Share of UK total in 2018** | 0.63% | 0.75% | 0.94% |

*Source: International Passenger Survey by ONS, UNWTO, Oxford Economics, * 2016 was a weak year for visits and spend due to the recession in Brazil*

# 1.1 Key statistics – volume and value

## Inbound volume and value

| Measure | 2018 | Change vs. 2017 | Rank out of UK top markets |
|---|---|---|---|
| Visits (000s) | 240 | -2%* | 29 |
| Nights (000s) | 1,993 | -23%* | 31 |
| Spend (£m) | 215 | -18%* | 29 |

Visits for Jan-Sept 2019 were up 23% to 232,000 visits with spend also up 16% in Jan-Sep 2019 to £214m.***

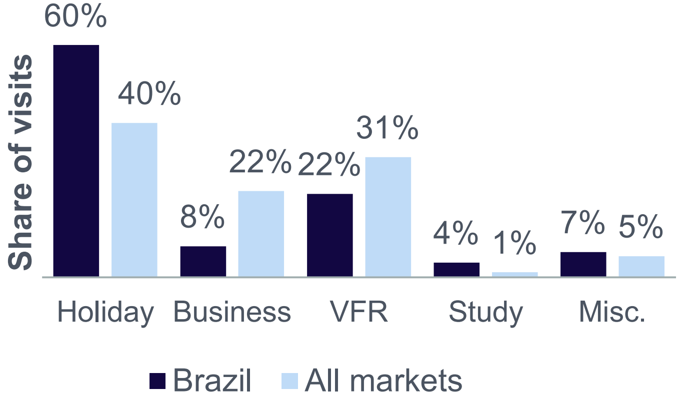
## Nights per visit, spend

| Averages by journey purpose in 2018 | Nights per visit | Spend per night | Spend per visit |
|---|---|---|---|
| Holiday | 7 | £116 | £774 |
| Business** | 8 | £160 | £1,353 |
| Visiting friends/ relatives** | 11 | £92 | £1,051 |
| All visits | 8 | £108 | £895 |

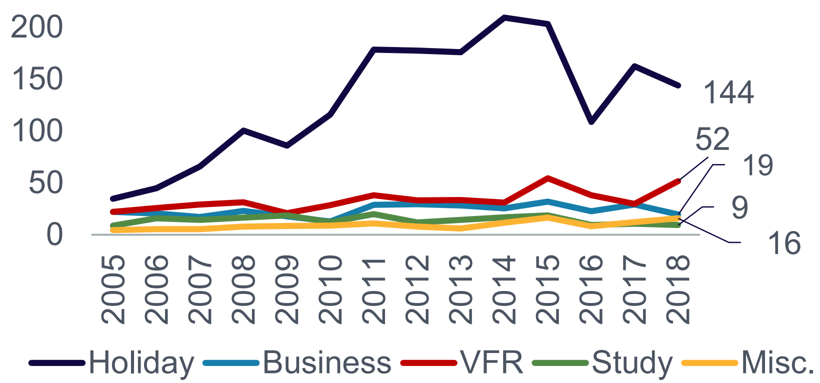
*Source: International Passenger Survey by ONS. ***2019 data is provisional until May 2020*
** Decreases can be attributed to high exchange rate with GBP paired with consumer uncertainty around the Presidential and government elections in October 2018*
*** small base*

# 1.1 Key statistics: journey purpose

## Journey purpose 2018




## Journey purpose trend (visits 000s)




Despite the sharp decline in 2016 caused by Brazil's economic recession, holiday visits continue to lead in terms of visitor volume from the Brazilian market. In 2018, there were 144,000 holiday visits from Brazil, equating to 60% of all visits to the UK (compared to 40% for the all market average). 2014 was a record year with 209,000 holiday visits from Brazil.

In 2018, 22% of visits were to visit friends and/or relatives, followed by 8% for business visits.

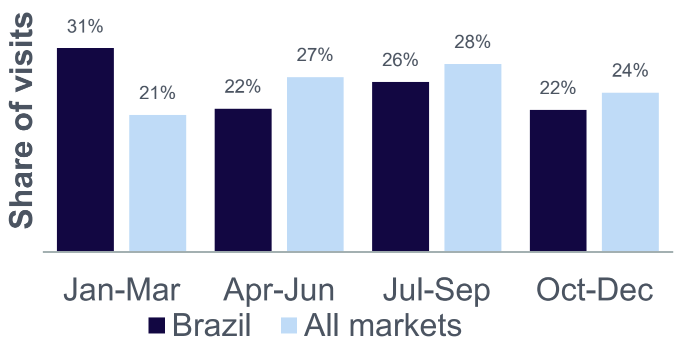
Brazil's economy returned to growth in Q1 2017, ending its deepest recorded recession ever. The country's outbound travel market has been in a state of recovery since.

Visits from Brazil to the UK in 2019* showed the strongest first nine months of arrivals since 2015 with 232,000 visits.

*Source: International Passenger Survey by ONS, *2019 figures are provisional until full annual release in 2020*

# 1.1 Key statistics: seasonality

## Seasonality 2018

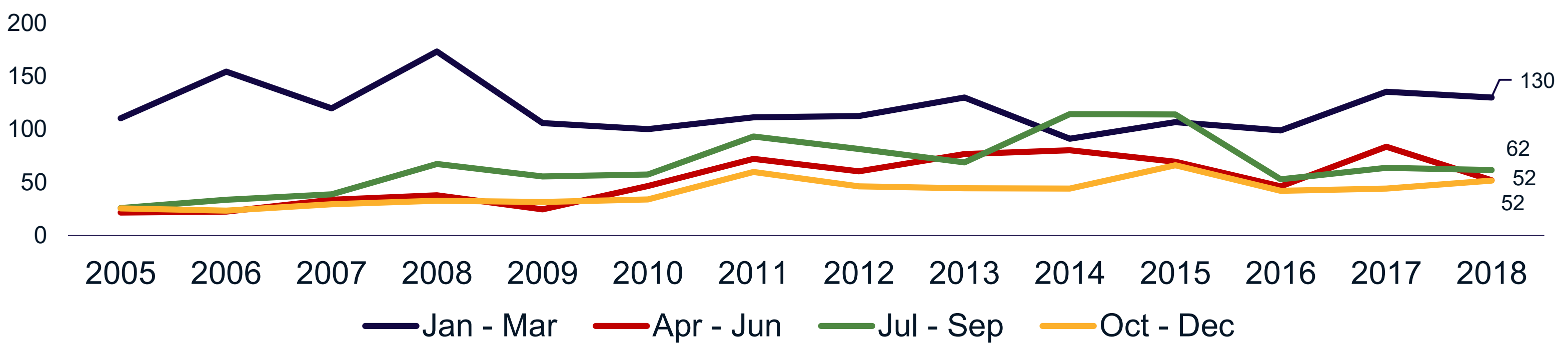



Brazilians visit the UK more often in the first quarter of the year compared to the average UK international visitor – 31% compared to 21%.

July to September (which is the winter period in Brazil) is the second most popular quarter, accounting for 26% of visits in 2018. Visitation in other quarters was evenly spread with 22% of visits in both April-Jun, and Oct-Dec.

The first quarter (January to March) in 2018 accounted for 31% of visits in 2018. Q1 2019 was a record first quarter for visits from Brazil to the UK with 79,000 visits*.

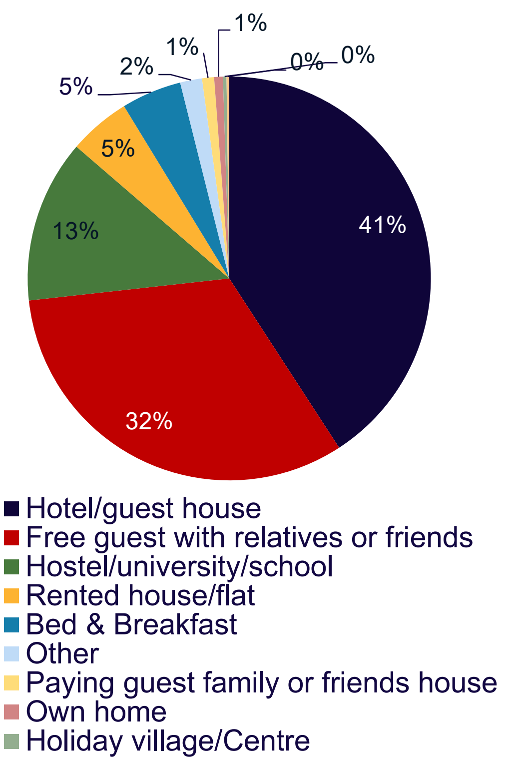
## Seasonality trend (visits 000s)



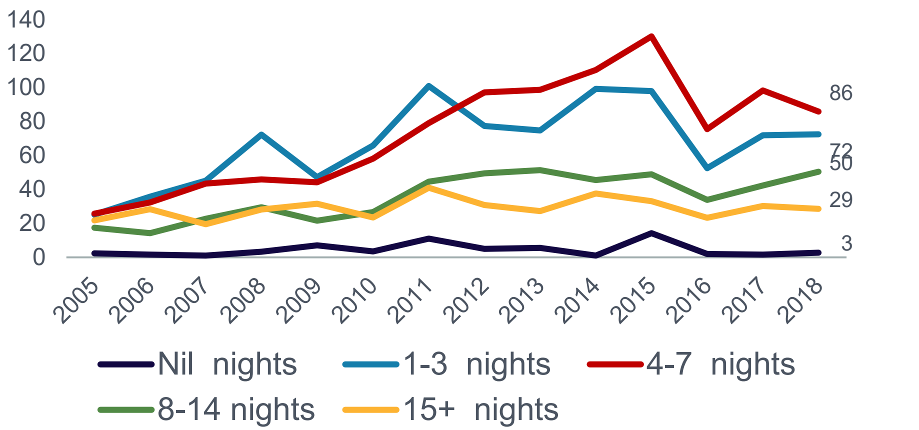

*Source: International Passenger Survey by ONS, *2019 figures are provisional until full annual release in 2020*

# 1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2018 (nights, % share)




Duration of stay trend (visits 000s)




Brazilian visitors spent an average of 8 nights per visit in the UK during 2018, slightly longer than the global average of 7 nights. While holiday visitors stay an average of 7 nights, Brazilians visiting family and/or friends as well as study visitors tend to stay for longer.

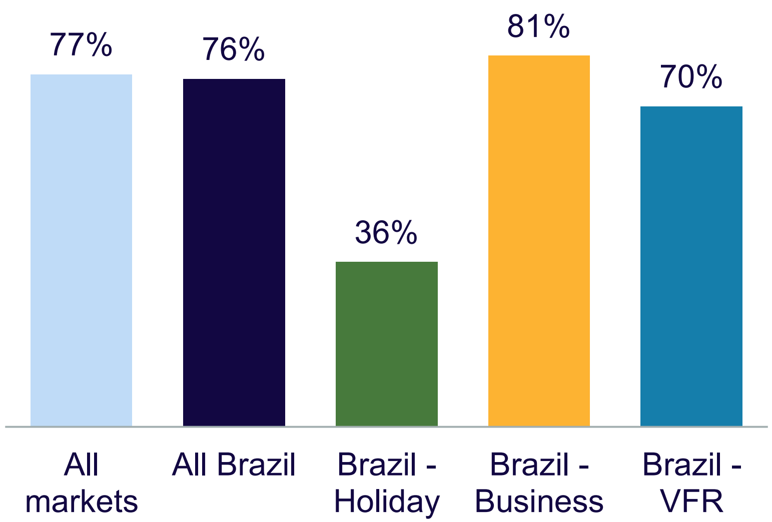
The most common length of stay in 2018 for Brazilian travellers to the UK was 4 – 7 nights, followed by short trips of 1-3 nights.* Those visiting for 8 – 14 nights reached 50,000 in 2018, near the 2013 record.

In 2018, 41% of nights were spent in a hotel or guest house. Around one third of nights were spent without cost in the house of a relative or friend living in the UK, whilst 13% of nights were spent in a hostel/university/school (vs. the all-market average of 8%).

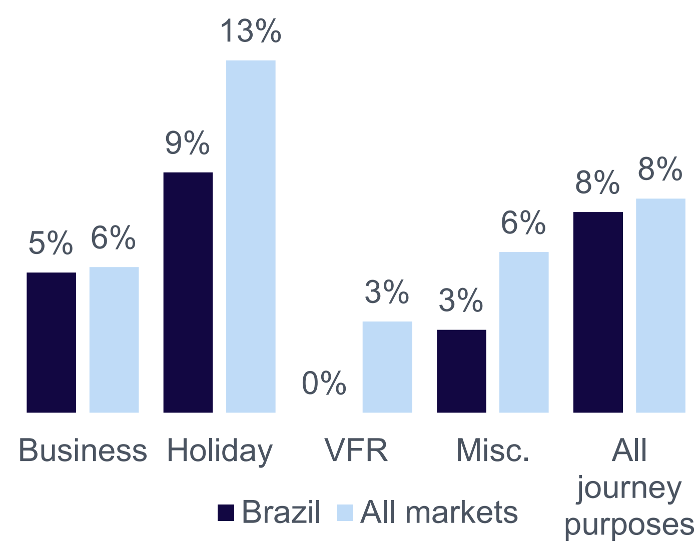
*Source: International Passenger Survey by ONS*
** Many Brazilians visit the UK as part of a multi-country trip, explaining the high number of short visits.*

# 1.1 Key statistics: repeat visits and package tours

Proportion of overnight visitors to the UK who have been to the UK before*




Proportion of visits that are bought as part of a package or all-inclusive tour in 2018**




36% of holiday visits from Brazil to the UK (excl. UK nationals)* are made by repeat visitors. On average, a Brazilian holidaymaker has come to the UK between 1 and 2 times during the past 10 years.
Business visitors and those coming to visit friends and/or relatives who live in the UK are more likely to be repeat visitors (81% and 70% respectively).
In 2018, 8% of Brazilian visits were bought as part of a package or all-inclusive tour, aligning with the all-market average.

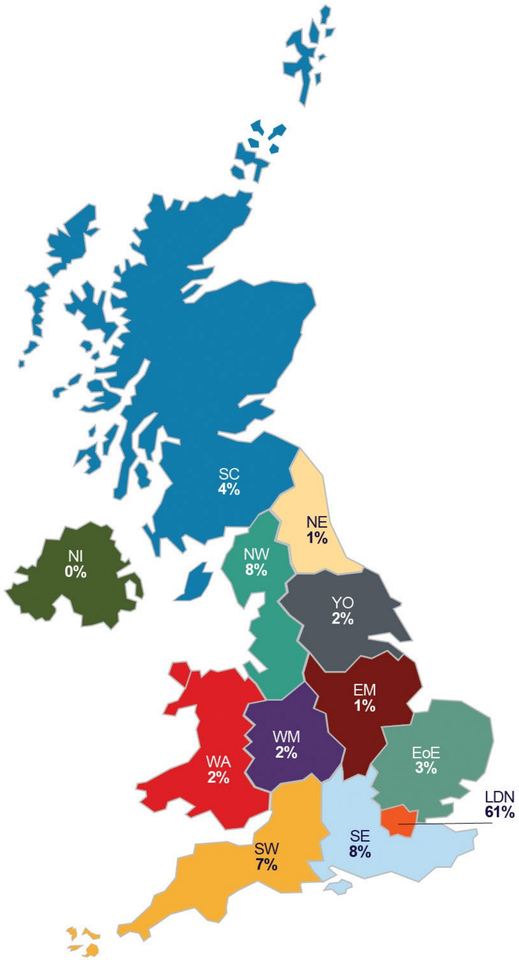
*International Passenger Survey by ONS. *latest data only available for 2015 excluding British nationals; **See definition of a package holiday in appendix*

# 1.2 Getting around Britain

## Nights & visits to the UK (2016-2018 averages)

| Region* | Nights stayed (000)** | Visits (000) | Spend (£m) |
|---|---|---|---|
| Total | 2,199 | 224 | 224 |
| Scotland (SC) | 92 | 15 | 11 |
| Wales (WA) | 54 | 4 | 13 |
| Northern Ireland (NI) | 1 | 1 | 0 |
| London (LDN) | 1,352 | 179 | 154 |
| North East (NE) | 22 | 1 | 1 |
| North West (NW) | 179 | 12 | 9 |
| Yorkshire (YO) | 40 | 5 | 2 |
| West Midlands (WM) | 47 | 6 | 4 |
| East Midlands (EM) | 16 | 3 | 1 |
| East of England (EoE) | 76 | 11 | 5 |
| South West (SW) | 150 | 8 | 8 |
| South East (SE) | 175 | 18 | 15 |
| Nil nights (Nil) | n/a | 2 | <1 |

## Nights (% share)



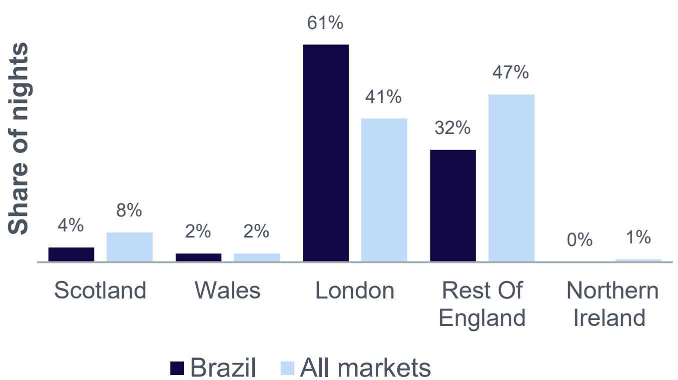

*Source: International Passenger Survey by ONS (2016-2018 averages) * The region is based on the location in which the visitor stayed overnight. **Nights in regions outside of London are indicative due to a small base*

# 1.2 Getting around Britain: regional spread and top towns and cities

Top towns and cities visited (2016-2018 averages)

| Town | Overnight visits (000s) |
|---|---|
| London | 179 |
| Edinburgh | 13 |
| Liverpool | 6 |
| Cambridge | 5 |
| Manchester | 4 |

Regional spread 2016-2018




Most Brazilian visitors stay in London, accounting for 61% of visitor nights between 2016 to 2018 – 21% higher than the global average of 41%. 32% of nights were spent in other parts of England.

Brazilians are less likely to stay in Scotland – 4% of nights spent in Britain during 2016-2018 compared to global average of 8%.

Holidaymakers from Brazil have a below average propensity to visit rural and coastal areas of Britain, whilst those visiting friends/or relatives have a higher than average propensity to do so.

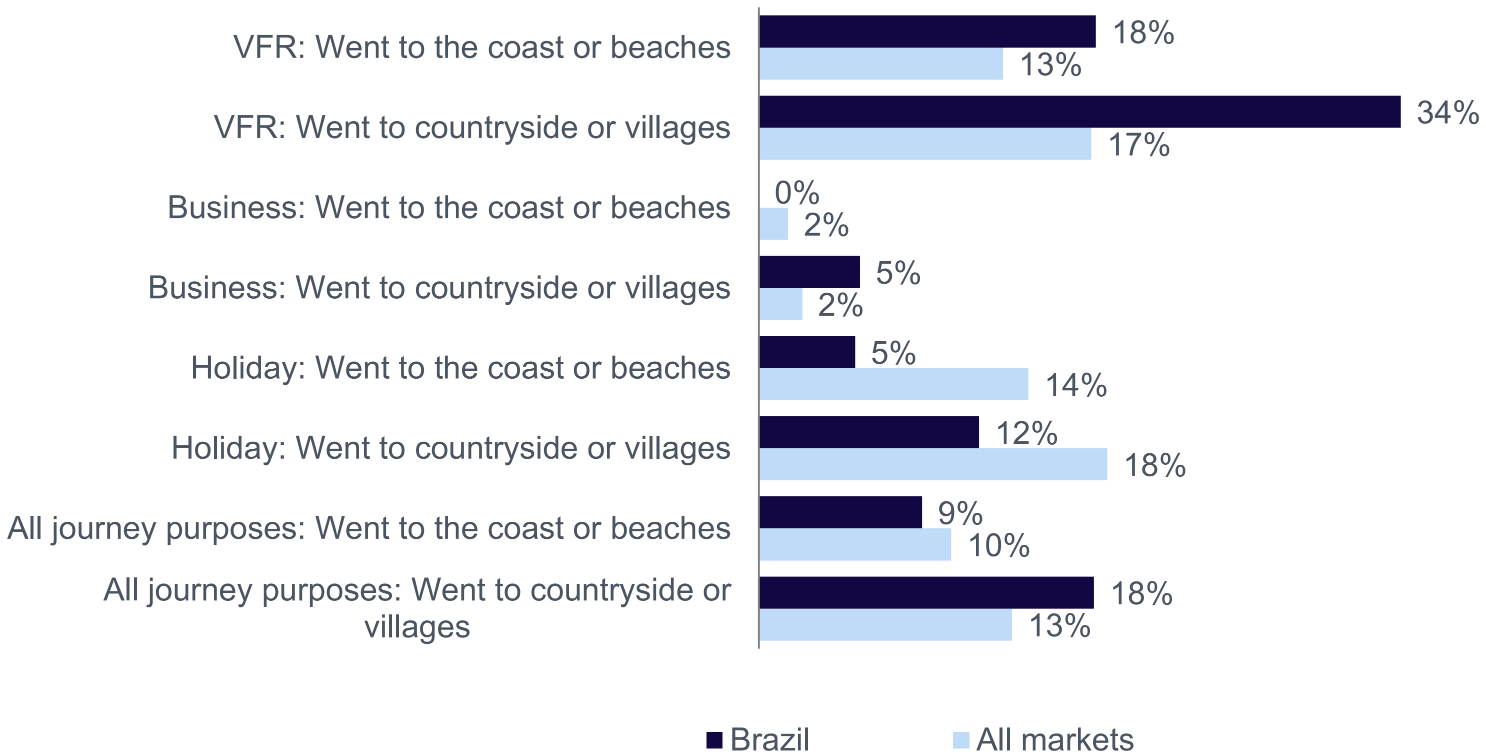
Brazilian visitors tend to be comfortable with taking public transport in cities, showing above-average use of the bus, tram or metro (73% compared to an all-market average of 48%). Compared to the market average, they are more likely to use public transport outside towns/cities as well.

1-in-3 Brazilian visitors use Uber or a similar app during their visit (compared to 9% all market average), whilst 28% take a taxi during their visit.

*Source: International Passenger Survey by ONS*

# 1.2 Getting around Britain: visits to coast, countryside and villages

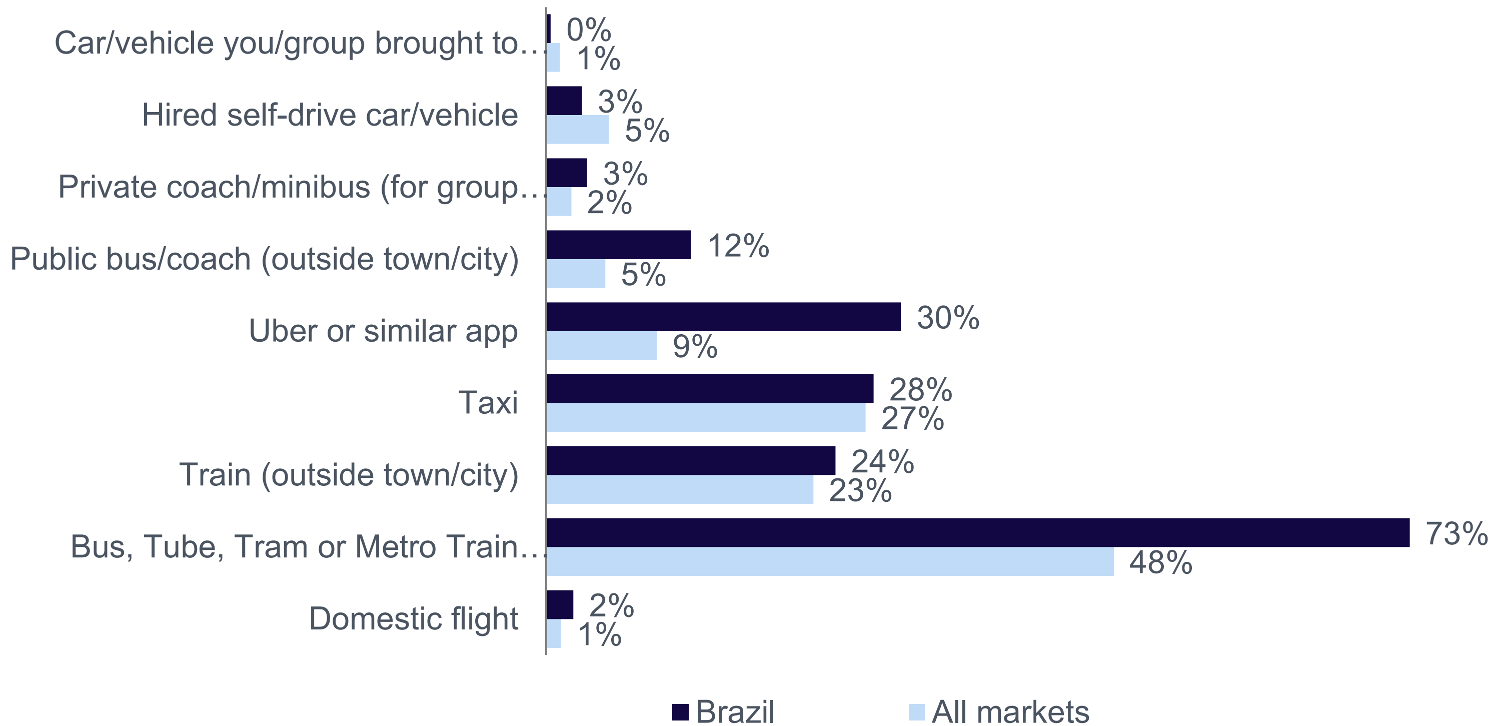
Propensity to visit coast, countryside and villages




*Source: International Passenger Survey by ONS 2016*

# 1.2 Getting around Britain: use of internal modes of transport

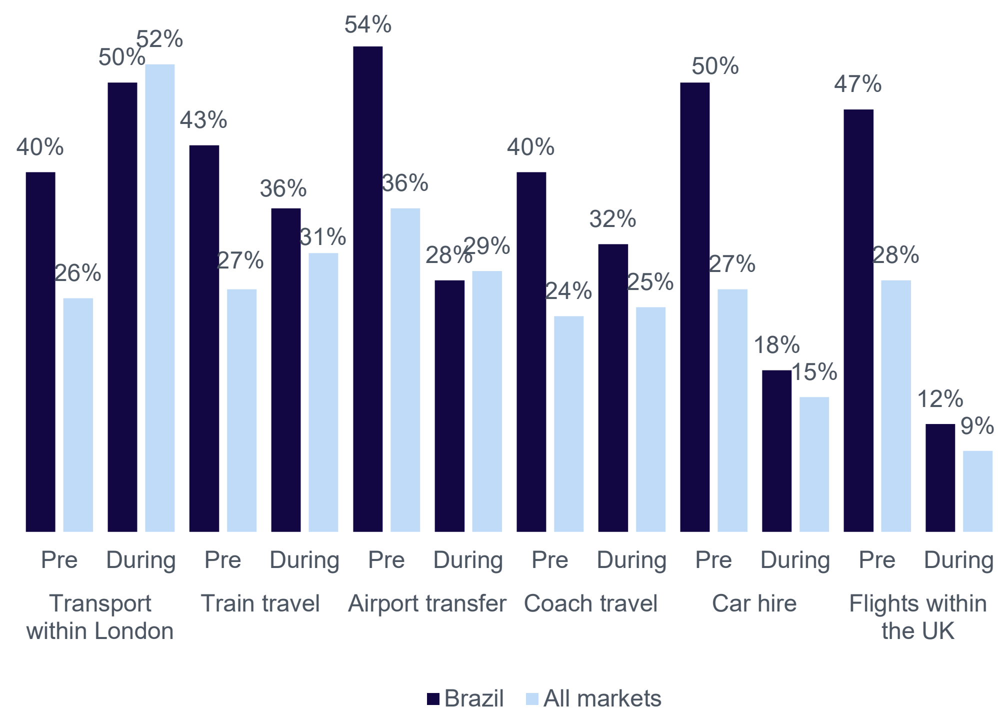
## Propensity to use internal modes of transport




*Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for 'car/vehicle you/group brought to the UK*

# 1.2 Getting around Britain: purchase of transport and package tours

Transport services purchased before or during trip (%)




Public transport is a preferred travel method with and between cities by Brazilians (73%).

Only 3% are likely to hire a car or a private coach during their visit.

Brazilians are more likely to pre-book the majority of transport services within the UK with the exception of transport within London.

Around half of Brazilians book their airport transfer, car hire and domestic flights within the UK prior to their trip, whilst around 40% book their transport within London, train travel and coach travel before their trip.

*International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors*

# 1.3 Visitor demographics

## Visitor characteristics

Brazilian visitors to the UK are predominantly aged 25 to 44 years (50% within this age bracket compared to the all-market average of 42%).

60% of Brazilian visitors in the UK, including a similar proportion of holiday visitors, are male.

Almost one third of Brazilian visits are made by travellers on their own. 37% are accompanied by their partners or spouses. 19% travel with other adult family members compared to the market average of 12%.

The largest proportion* of Brazilian visitors who came to the UK reside in the city of São Paulo (48%), followed by the city of Rio de Janeiro (23%).

90% of visits from Brazilian residents to the UK were made by Brazilian nationals and 2% by British nationals.

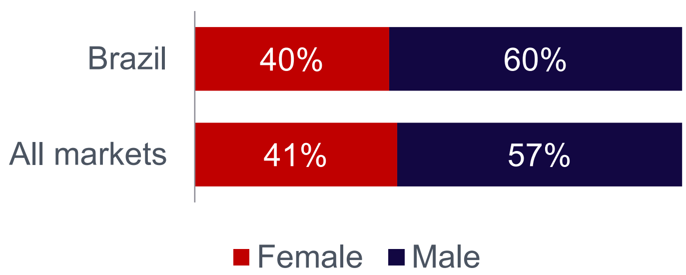
**50%**

of Brazilian travellers are aged 25-44 years old

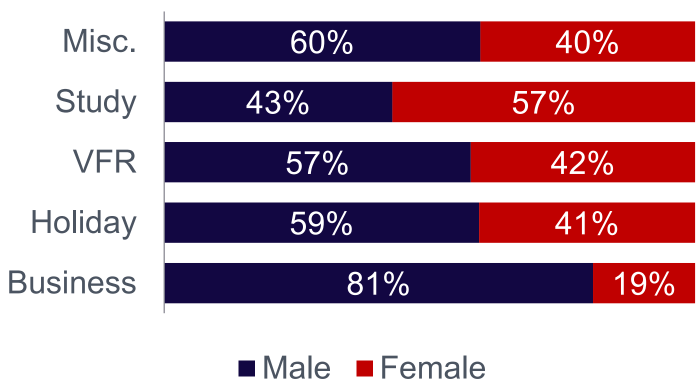
*Source: International Passenger Survey by ONS; *latest research on geographic residence of visitors undertaken in 2016*

# 1.3 Visitor demographics: gender and age groups

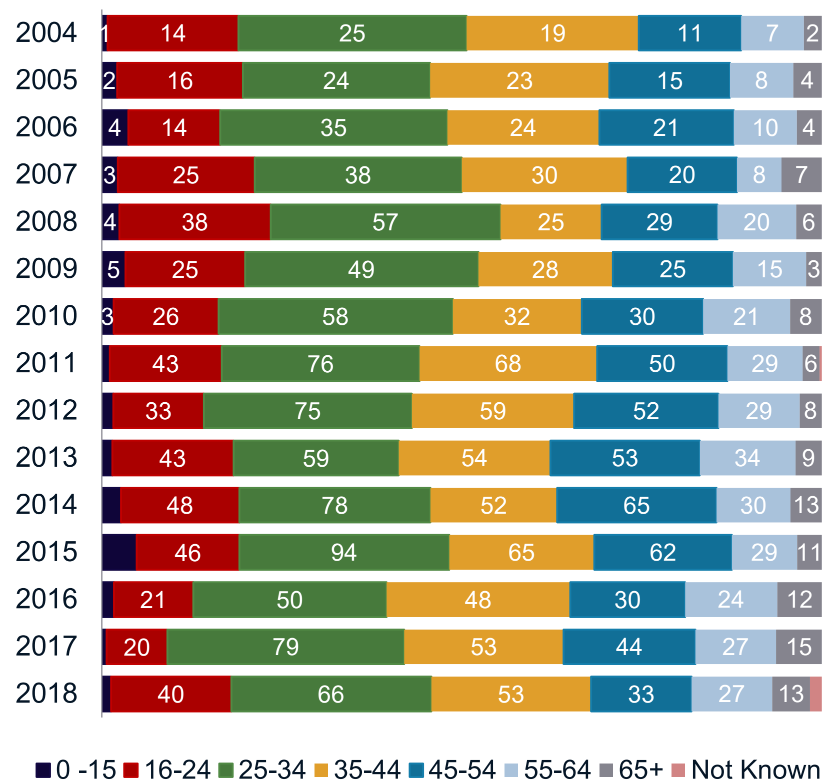
Gender ratio of visits (2018):




Gender ratio of visits from Brazil by journey purpose (2018):



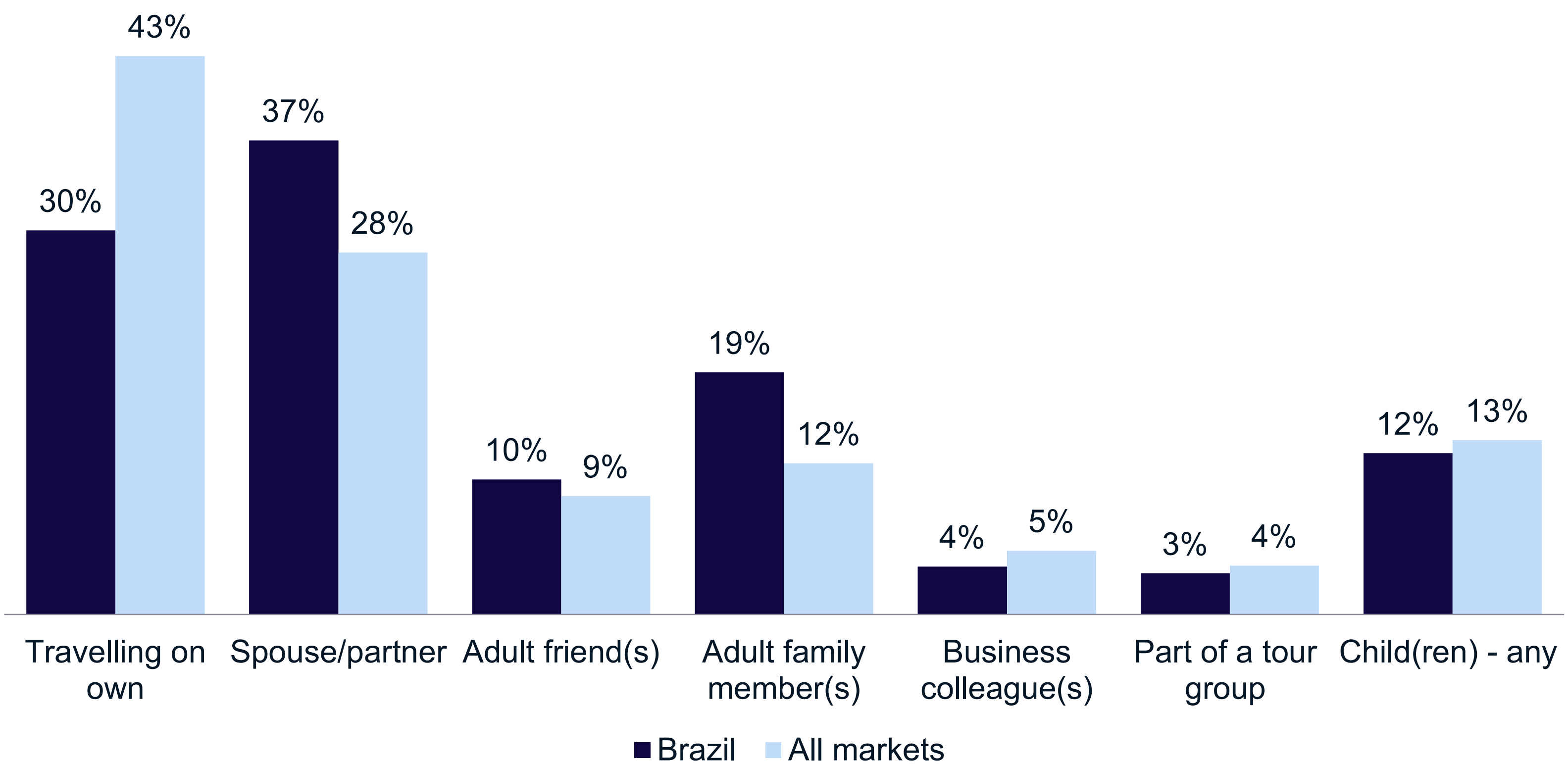

Age group trend (visits in 000s)




*Source: International Passenger Survey by ONS*

# 1.3 Visitor demographics: travel companions

Who have Brazilian visitors to the UK travelled with?




*Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?*

# 1.3 Visitor demographics: origin

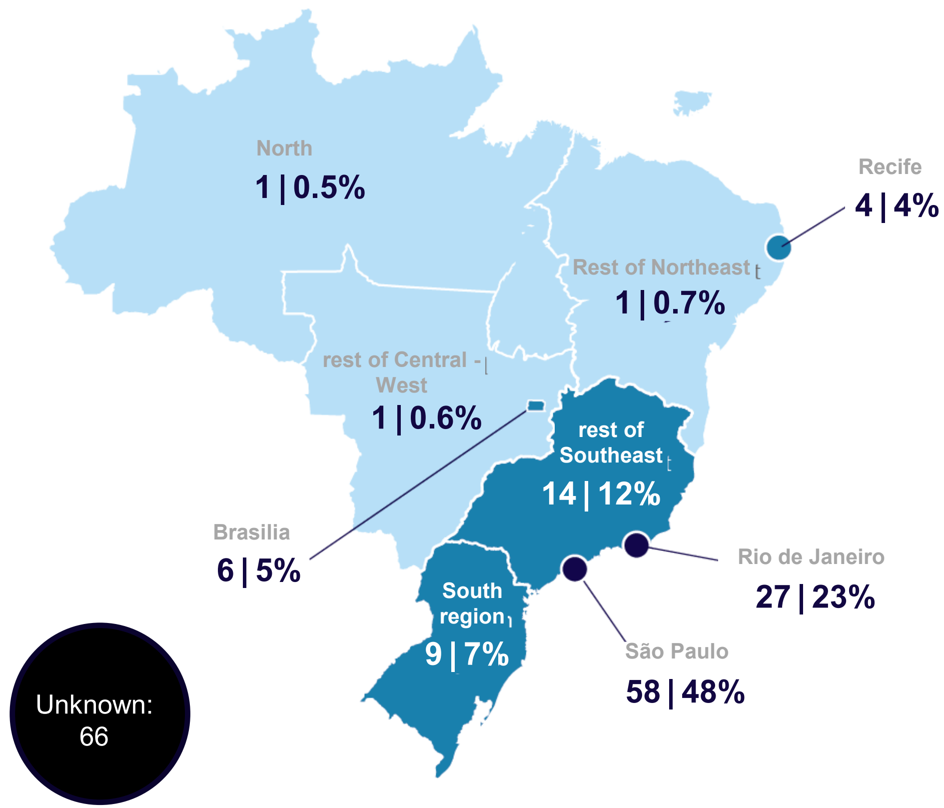
Visits to the UK in 2016 (000)

The largest proportion of Brazilian visitors who came to the UK reside in the city of São Paulo, followed by the city of Rio de Janeiro. Together, each generated more than seven-in-ten inbound visits from Brazil in 2016.

Connectivity reflects these largest source cities as both have nonstop flights to London.

Visits in 000s | % share of visits

- High
- Medium
- Low




*Source: International Passenger Survey by ONS, 2016*

# 1.4 The UK and its competitors

## Market size, share and growth potential

The USA, Argentina, Portugal and France were the most visited destinations by Brazilian overnight visitors in 2018, with the UK ranked at 11th position.

In 2018, 40% of overnight trips by Brazilians were taken to Europe of which 5% were taken in the UK (down 3 percentage points since 2008).

Brazil's outbound travel market has been recovering from a decline caused by Brazil's worst economic recession during 2016. Forecasts suggest there is potential for 35% growth in the number of visits to the UK during the next few years (2018-2025).

Of those who came to Britain for a holiday, 44% considered France, 38% Italy, 37% Germany, 36% Portugal and 35% Spain as an alternative holiday destination.

Among the competitor set, the US and Portugal recorded the highest growth in market share in terms of Brazilian outbound overnight trips in the period of 2008 to 2018, at +7 percentage points each.

Brazilians have a high propensity to visit the UK as part of a multi-country trip – 21% of visits included at least one night in another country compared to 5% for the all market average.

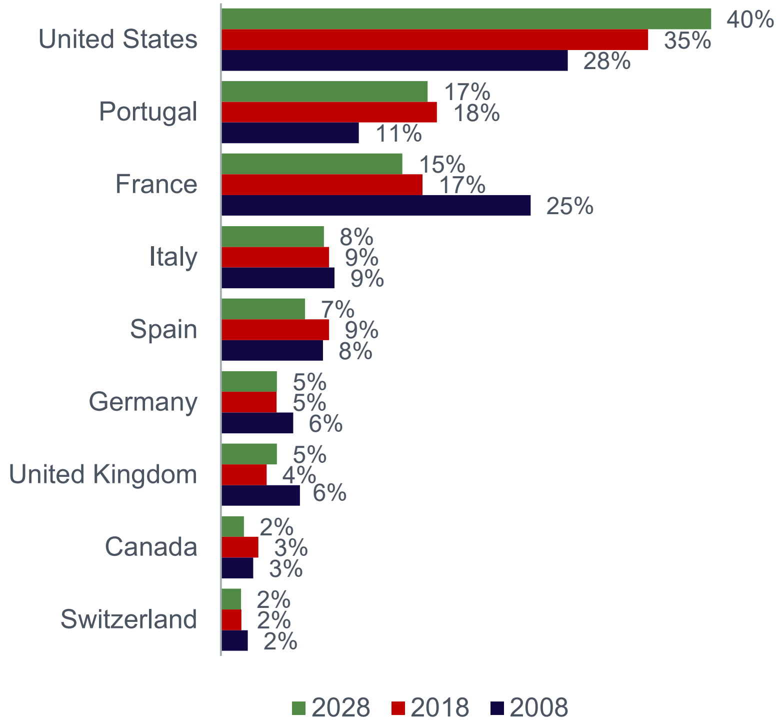
**Britain ranks 11th**

for Brazilian outbound destinations by overnight trips

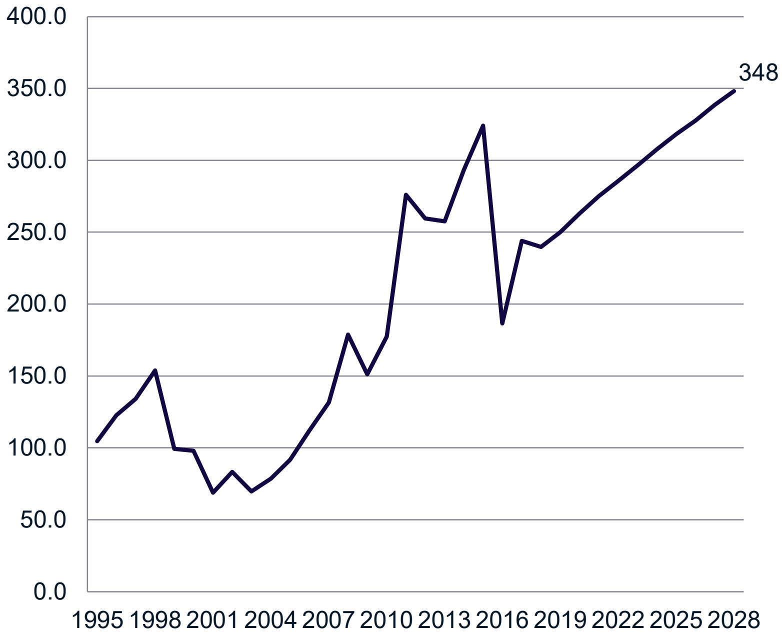
*Source: Oxford Economics, VisitBritain/IPSOS 2016*

# 1.3 Britain and competitors

UK's market share of Brazilian overnight visits among competitor set




Historic and potential visits to the UK (000s)

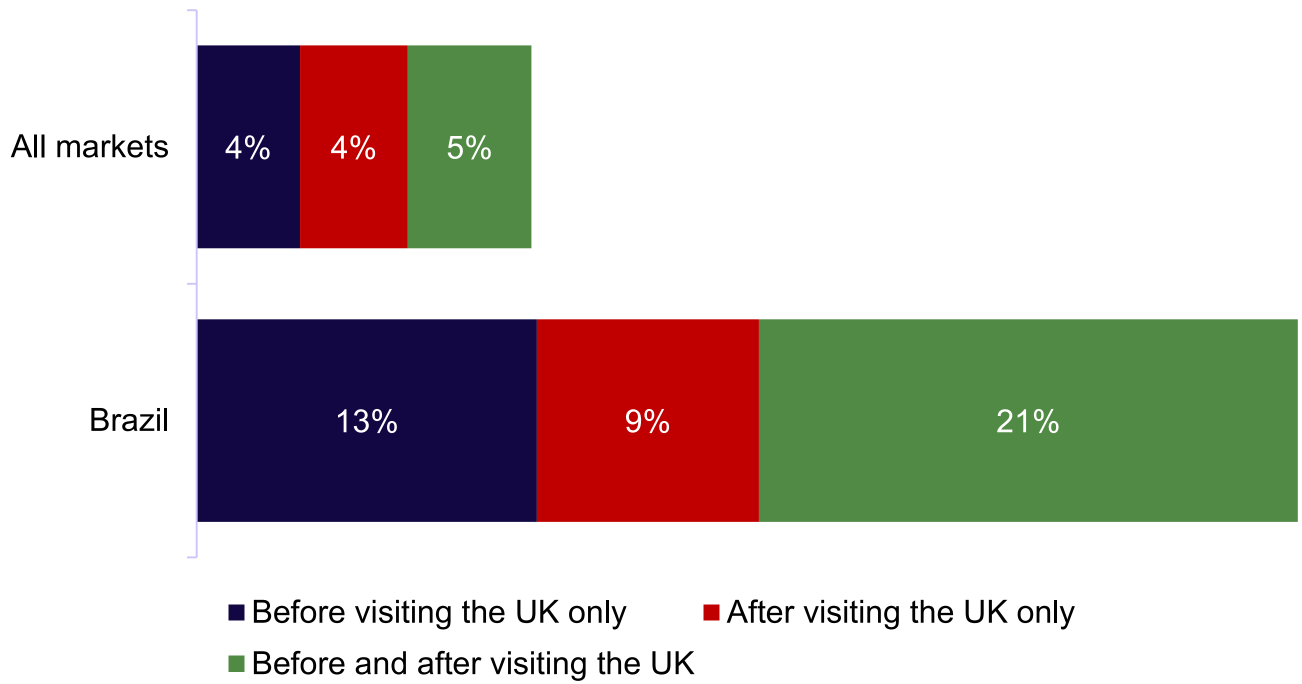



*Source: Oxford Economics*

# 1.4 The UK and its competitors

## Propensity for Brazilian travellers to visit the UK as part of a multi-country trip

% visits which included at least a night in another country…




*Source: International Passenger Survey by ONS, 2016*

# Chapter 2
# Experiences and perceptions

# 2.1 Inbound activities

Dining in restaurants and shopping are the most popular activities for Brazilian visitors while in the UK, with 72% and 70% doing so.

More than half of Brazilians like to visit parks and gardens, museums and art galleries as well as sightsee famous monuments and buildings. They are more likely to do all these activities compared to the average UK international visitor.

Brazilians are more than twice as likely to visit religious buildings whilst 47% visit castles or historic houses.

56% enjoy going to the pub whilst 36% enjoy socialising with locals.

Brazilians are twice as likely to go on a guided tour compared to the average UK visitor (30% vs 15%).

Around 8,000 visits per year feature time watching live football at a stadium.

*Source: International Passenger Survey by ONS, rankings based on 2007-2017 data,*

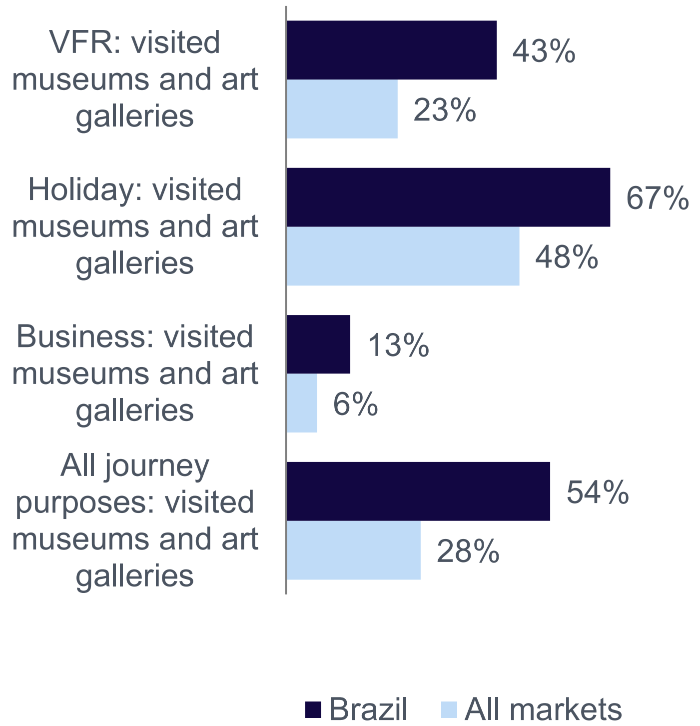
## Top 10 activities for Brazil visitors during their visit to the UK

1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Visiting museums or art galleries
5. Sightseeing famous monuments/buildings
6. Visiting parks or gardens
7. Visiting castles or historic houses
8. Visiting religious buildings
9. Socialising with the locals
10. Going on a guided tour

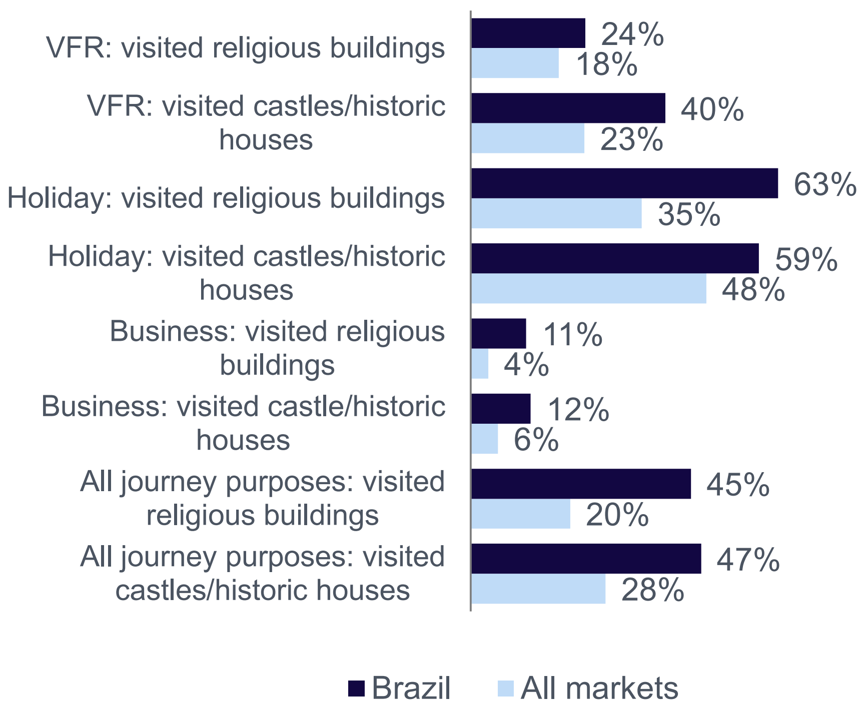
For more information on activities, please consult: https://www.visitbritain.org/activities-undertaken-britain

# 2.1 Inbound activities

Propensity to visit museums and galleries



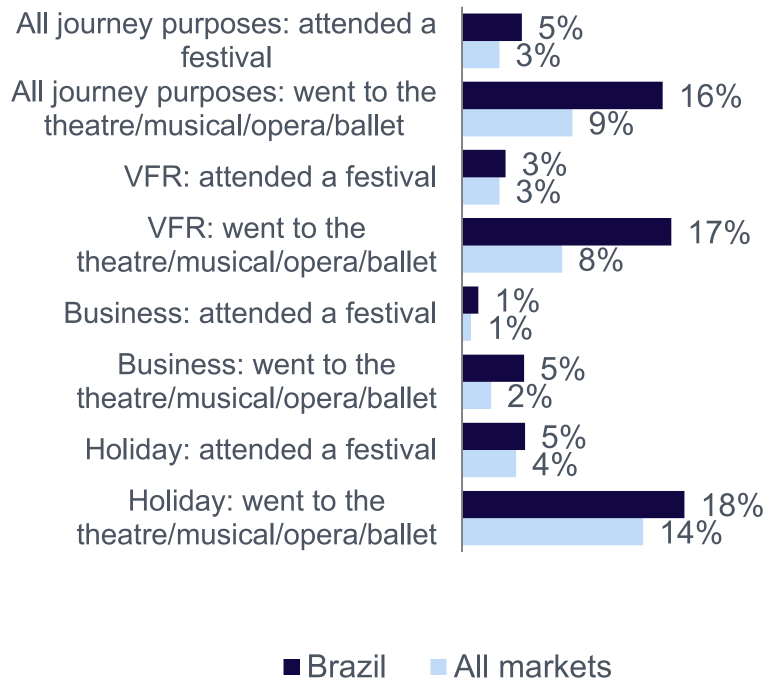

Propensity to visit built heritage sites



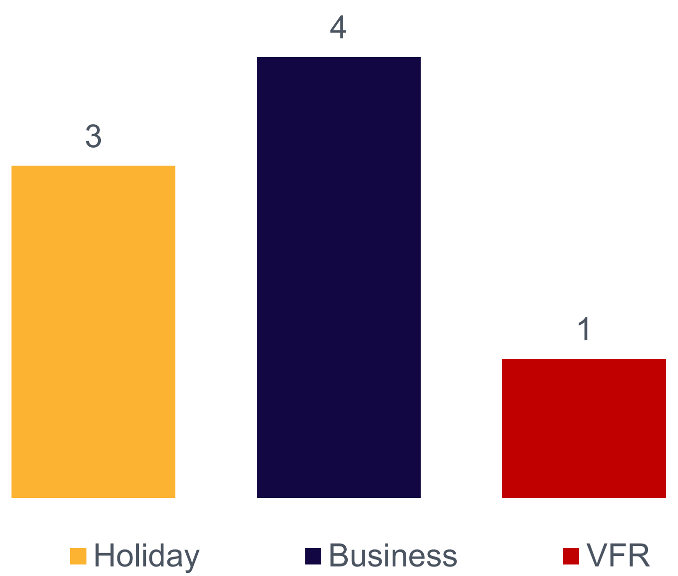

*Source: International Passenger Survey by ONS 2016*

# 2.1 Inbound activities

Propensity to attend the performing arts

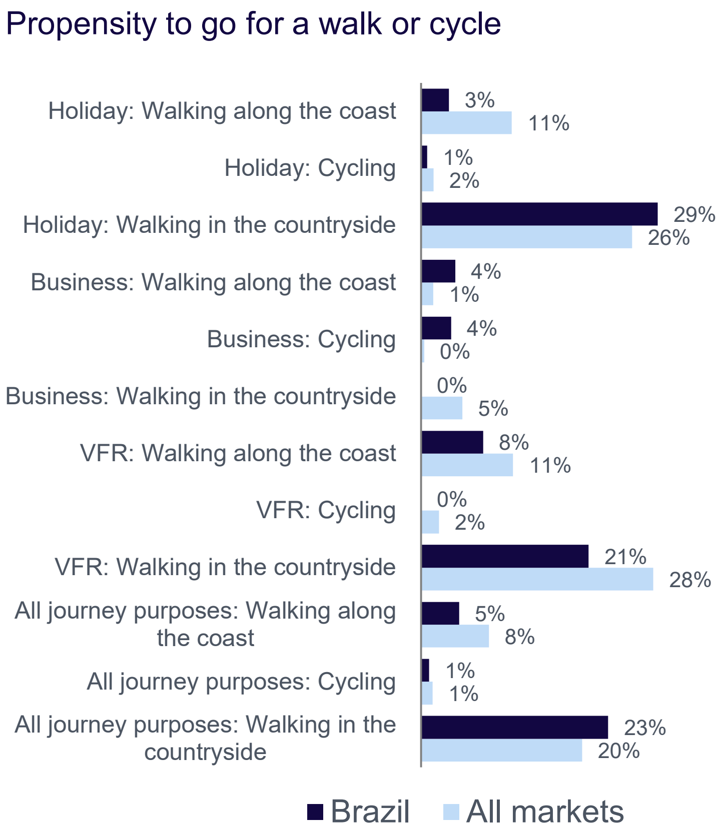


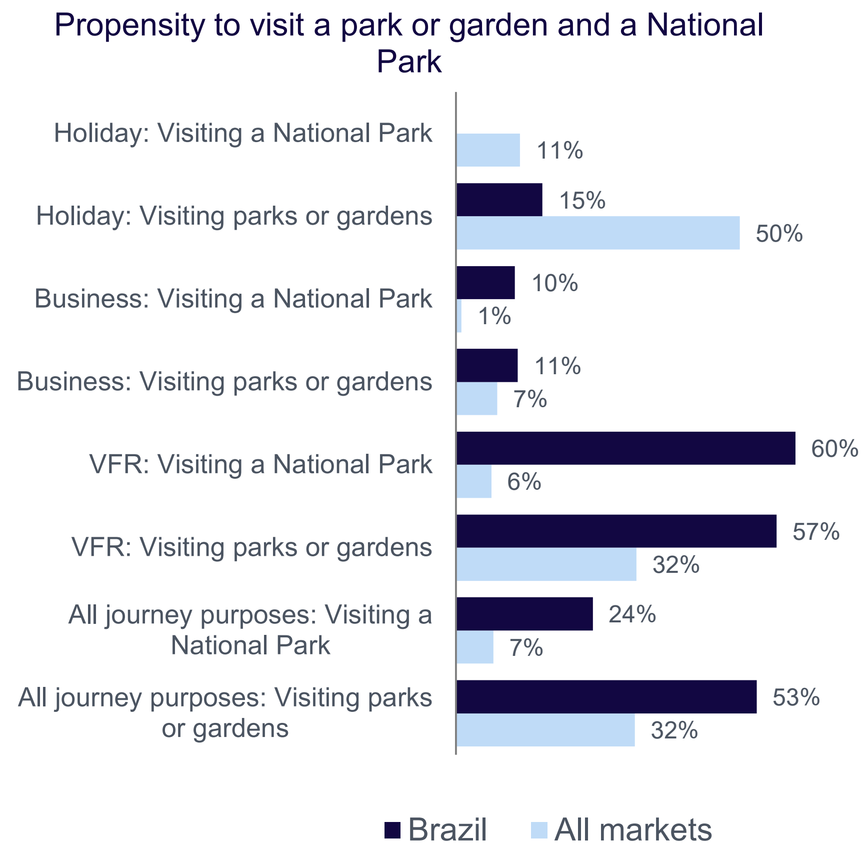

Number of Brazilians who went to watch football live during their trip (000s)




*Source: International Passenger Survey by ONS 2011 and 2016*

# 2.1 Inbound activities

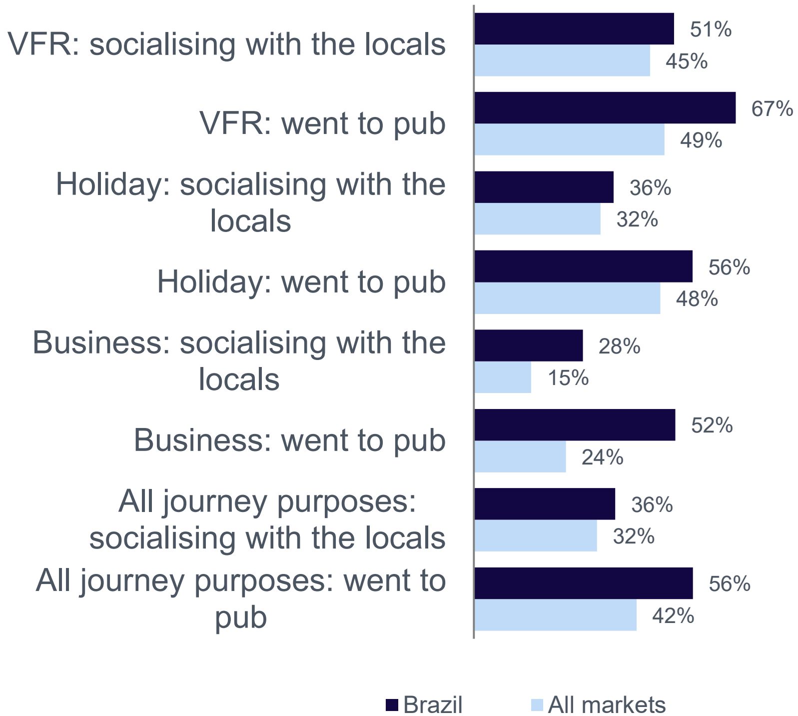


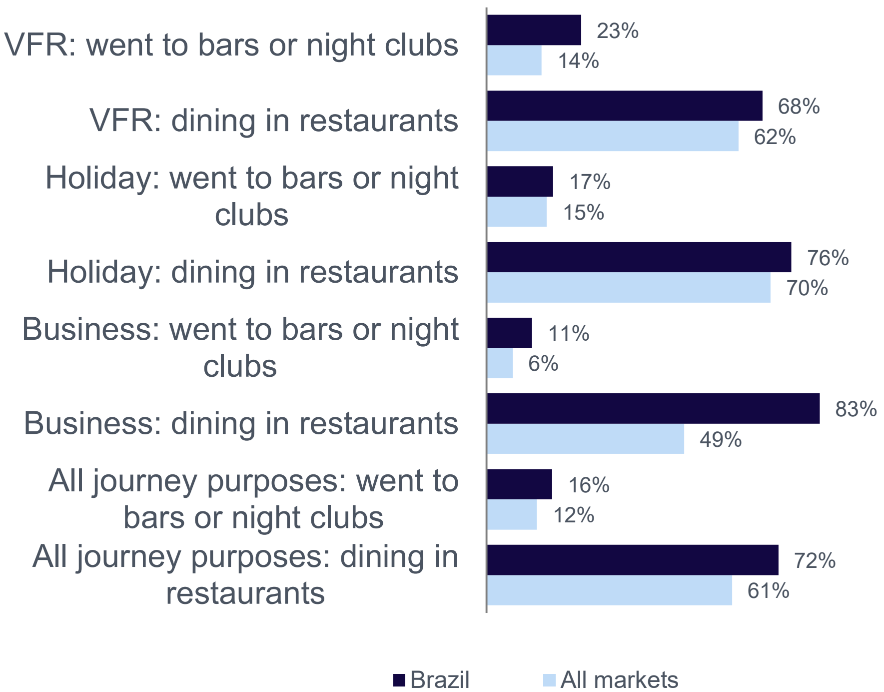

*Source: International Passenger Survey by ONS 2010 and 2016*

# 2.1 Inbound activities

Propensity to go to a pub and socialise with locals



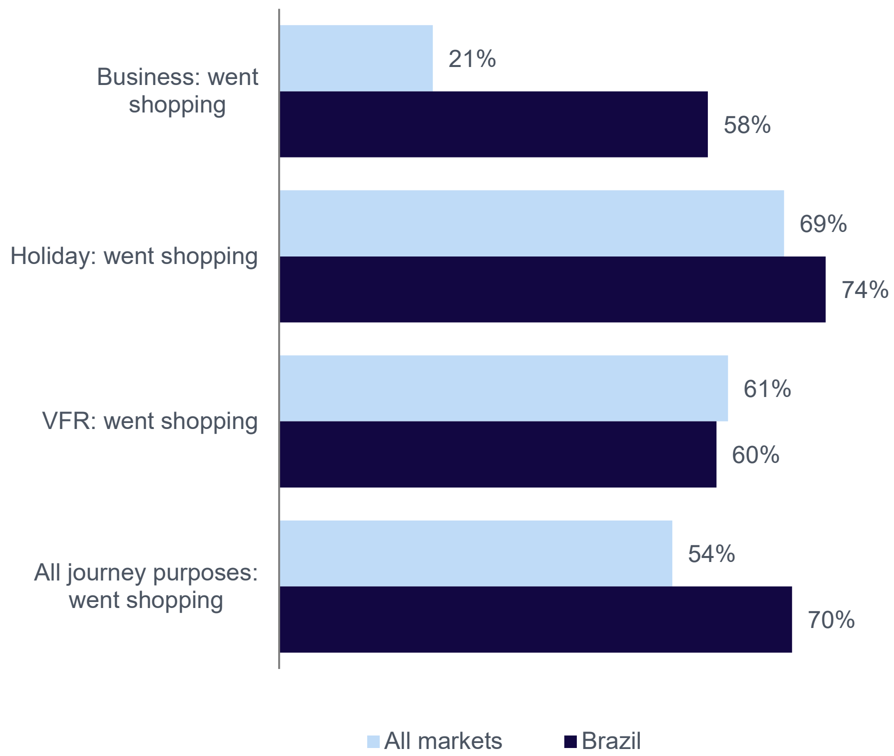

Propensity to go dining in restaurants, or to go to bars or night clubs



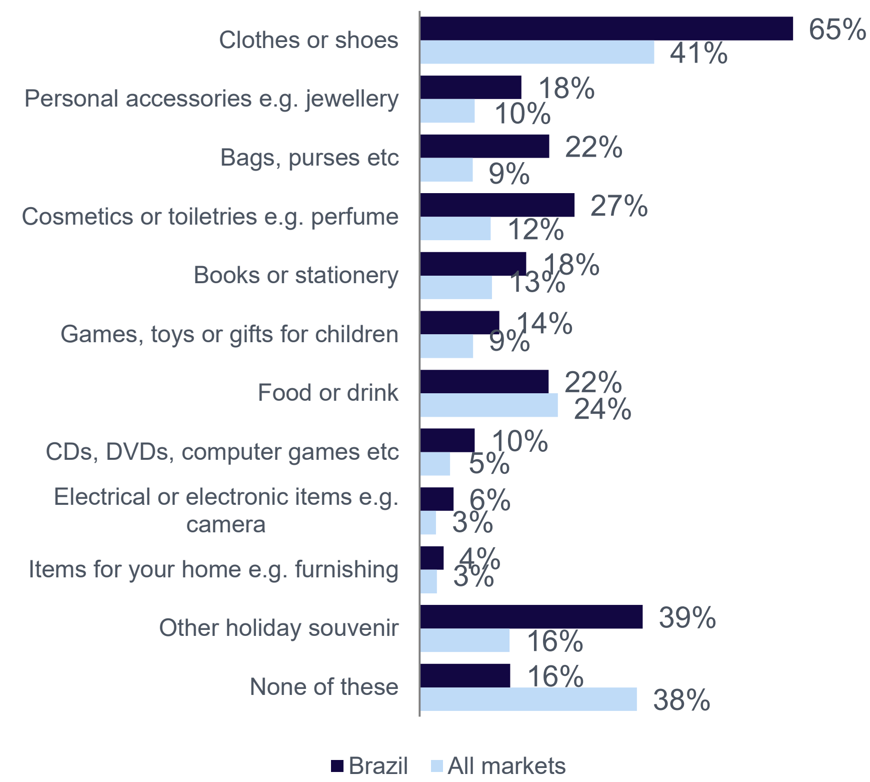

*Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)*

# 2.1 Inbound activities

## Propensity to go shopping during visits to the UK



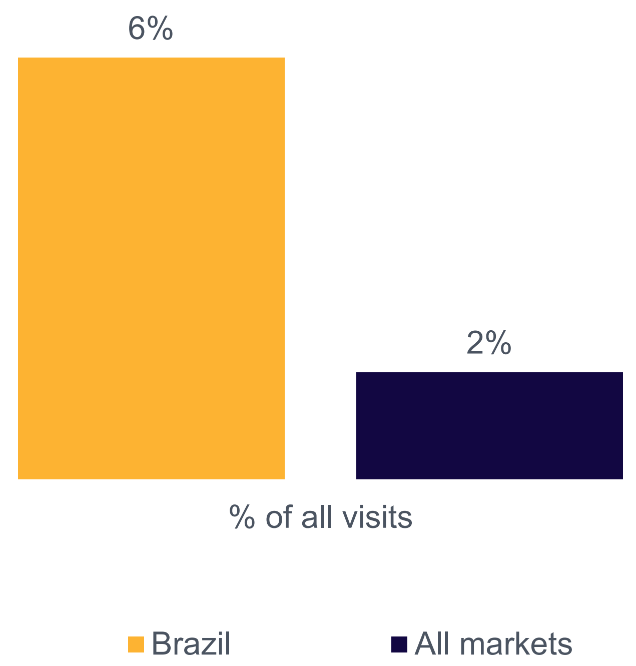

## Propensity to purchase selected items



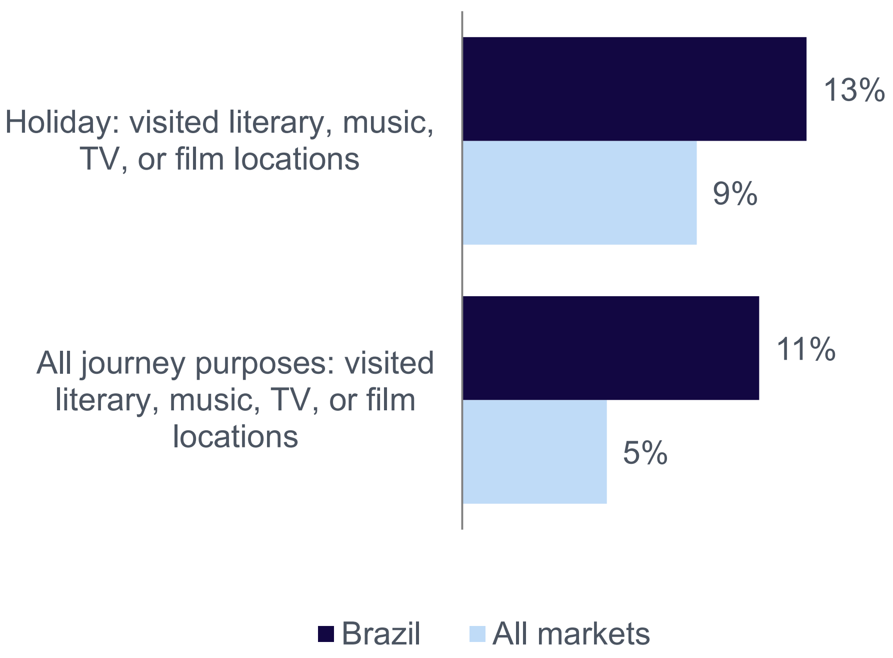

*Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)*

# 2.1 Inbound activities

Propensity to participate in an English language course during a visit to the UK

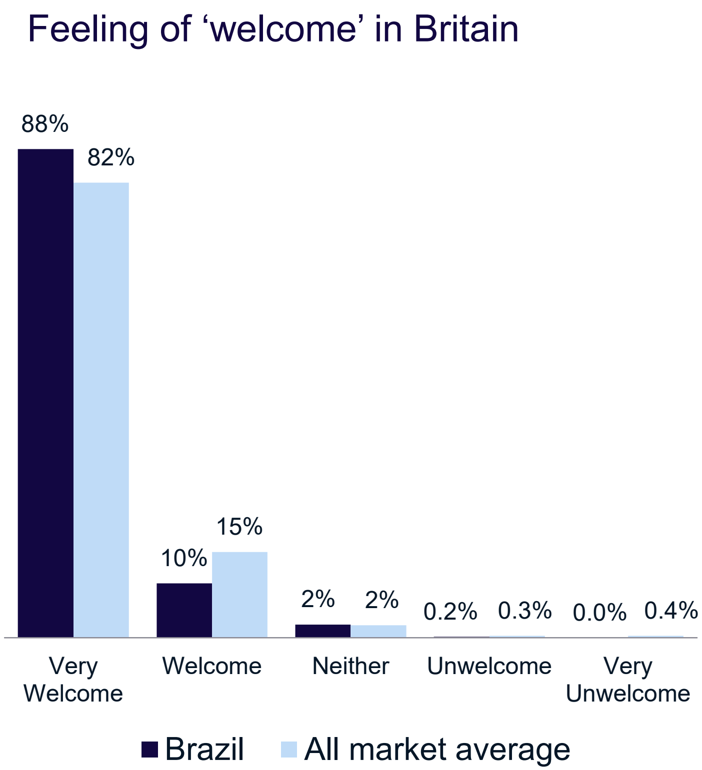


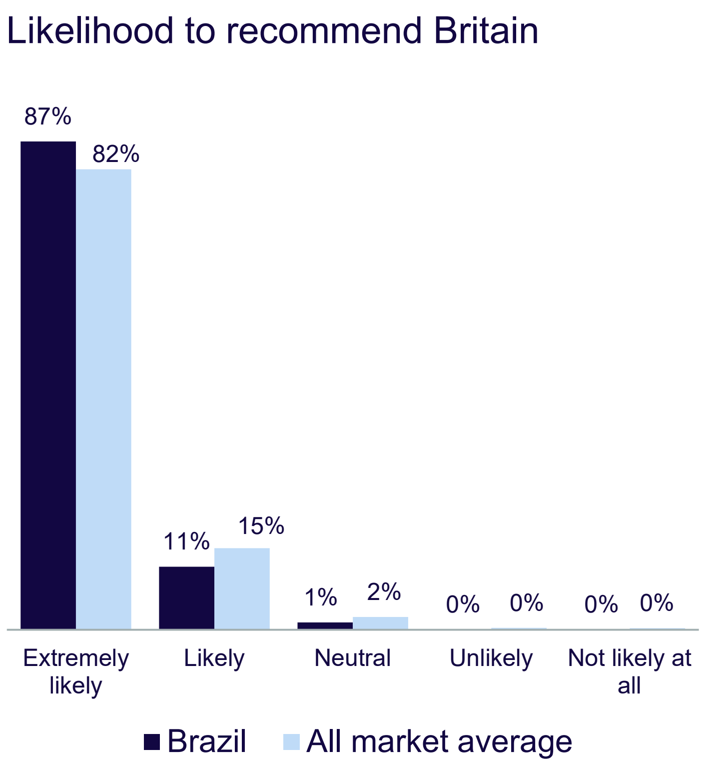

Propensity to visit a literary, music, TV or film location




*Source: International Passenger Survey by ONS, 2017 (literary, music, TV or film location) 2018, Did you go on any English language courses during this visit? Displayed as % of all visits to the UK from each country that included participation in an English language course.*

# 2.2 Welcome and recommending Britain




*Source: International Passenger Survey by ONS,*

## 2.3 Perceptions of Britain

Brazilians rate Britain 8th out of fifty nations for Culture, 11th for Tourism and 13th for People. They rank Britain highly for vibrant cities (7th) and contemporary culture (8th) but less so for natural beauty (28th).

Museums, films and music are the cultural products that are most strongly associated with Britain by Brazilians.

A trip to Britain would be expected to be 'fascinating', 'educational' and 'exciting' by many Brazilians.

The USA, Italy, France and Australia are destinations that Brazilians consider are the 'best place' for delivering what they want most from a holiday destination.

Cultural attractions motivated many Brazilian visitors (36%) to choose Britain for their holiday destination. A wide variety of places to visit and a culture that is different from the Brazilian culture are important motivators as well (both 31%).

Sought-after activities for potential visitors from Brazil include taking a canal boat tour through the waterways of England, a food tour in a foodie market, a visit to Windsor castle, a wine tour as well as a street art tour.

Britain is the
**9th strongest nation brand**
among 50 nations according to Brazilians

*Source: Anholt Nation Brands Index, powered by Ipsos 2018/2019, Arkenford 2013, VisitBritain/IPSOS 2016*

# 2.3 Perceptions of Britain

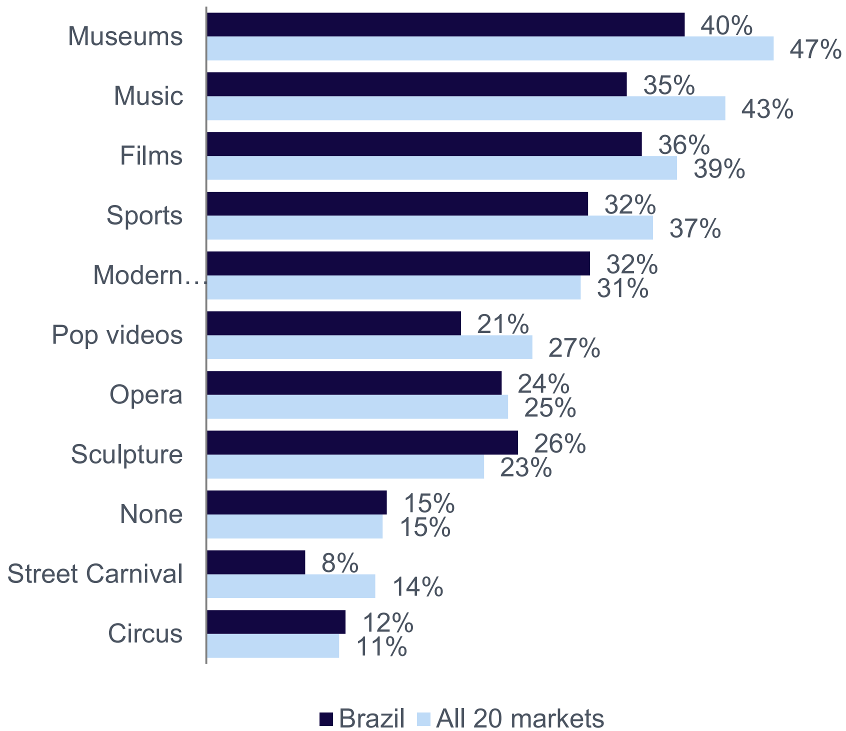
## UK's ranking (out of 50 nations)

| Measure | Brazilian respondents | All respondents |
|---|---|---|
| **Overall Nation Brand** | **9** | **4** |
| **Culture (overall)** | **8** | **5** |
| The country has a rich cultural heritage | 12 | 7 |
| The country is an interesting and exciting place for contemporary culture such as music, films, art and literature | 8 | 3 |
| The country excels at sports | 12 | 5 |
| **People (overall)** | **13** | **7** |
| If I visited the country, the people would make me feel welcome | 16 | 16 |
| **Tourism (overall)** | **11** | **4** |
| Would like to visit the country if money was no object | 13 | 6 |
| The country is rich in natural beauty | 28 | 26 |
| The country is rich in historic buildings and monuments | 10 | 5 |
| The country has a vibrant city life and urban attractions | 7 | 4 |

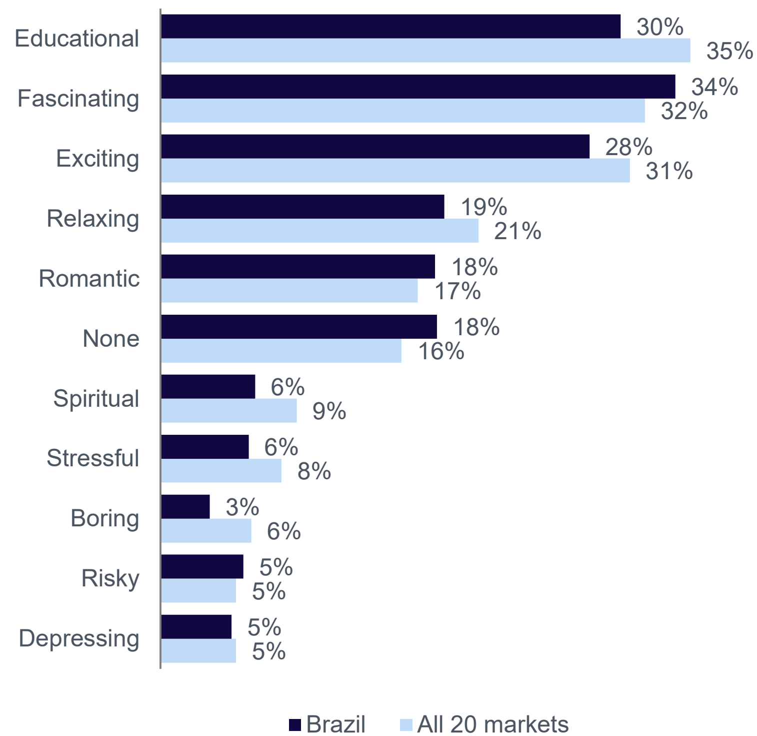
*Source: Anholt Nation Brands Index, powered by Ipsos 2019*

# 2.3 Perceptions of Britain

## Cultural associations with the UK




## Adjectives describing a potential trip the UK




*Source: Anholt Nation Brands Index, powered by Ipsos 2019*

# 2.3 Perceptions of Britain

## Holiday wants and % saying destination is best place for…

| Importance | Attribute (20 most important) | GB | FR | IT | AU | US | GE |
|---|---|---|---|---|---|---|---|
| 6.42 | Have fun and laughter | 18% | 35% | 28% | 27% | 62% | 15% |
| 6.40 | Enjoy the beauty of the landscape | 25% | 56% | 59% | 53% | 28% | 28% |
| 6.40 | Offers good value for money | 20% | 23% | 31% | 24% | 52% | 19% |
| 6.38 | Fashionable destination | 43% | 69% | 70% | 50% | 55% | 41% |
| 6.35 | Experience activities/places with a wow factor | 26% | 44% | 45% | 43% | 42% | 31% |
| 6.32 | Experience things that are new to me | 31% | 40% | 35% | 36% | 48% | 34% |
| 6.32 | See world famous sites and places | 45% | 68% | 66% | 28% | 58% | 40% |
| 6.29 | It offers unique holiday experiences | 43% | 56% | 57% | 58% | 54% | 42% |
| 6.25 | Broaden my mind/ Stimulate my thinking | 42% | 54% | 49% | 31% | 45% | 39% |
| 6.25 | Visit a place with a lot of history/historic sites | 53% | 68% | 73% | 16% | 25% | 47% |
| 6.25 | Provides a wide range of holiday experiences | 38% | 51% | 55% | 54% | 63% | 39% |
| 6.24 | Explore the place | 26% | 34% | 43% | 43% | 42% | 25% |
| 6.24 | Enjoy local specialities (food and drink) | 29% | 74% | 74% | 25% | 31% | 34% |
| 6.22 | The people are friendly and welcoming | 21% | 28% | 48% | 37% | 30% | 21% |
| 6.21 | Do what I want when I want spontaneously | 14% | 32% | 35% | 32% | 41% | 15% |
| 6.20 | Enjoy peace & quiet | 18% | 42% | 46% | 33% | 15% | 19% |
| 6.17 | A good place to visit at any time of year | 26% | 40% | 44% | 41% | 51% | 25% |
| 6.15 | Get off the beaten track | 27% | 46% | 42% | 40% | 41% | 29% |
| 6.15 | Good shopping | 20% | 36% | 22% | 13% | 77% | 12% |
| 6.12 | Feel connected to nature | 12% | 36% | 39% | 70% | 15% | 11% |

*Source: VisitBritain/Arkenford 2013, base: international travellers from Brazil*

# 2.3 Perceptions of Britain

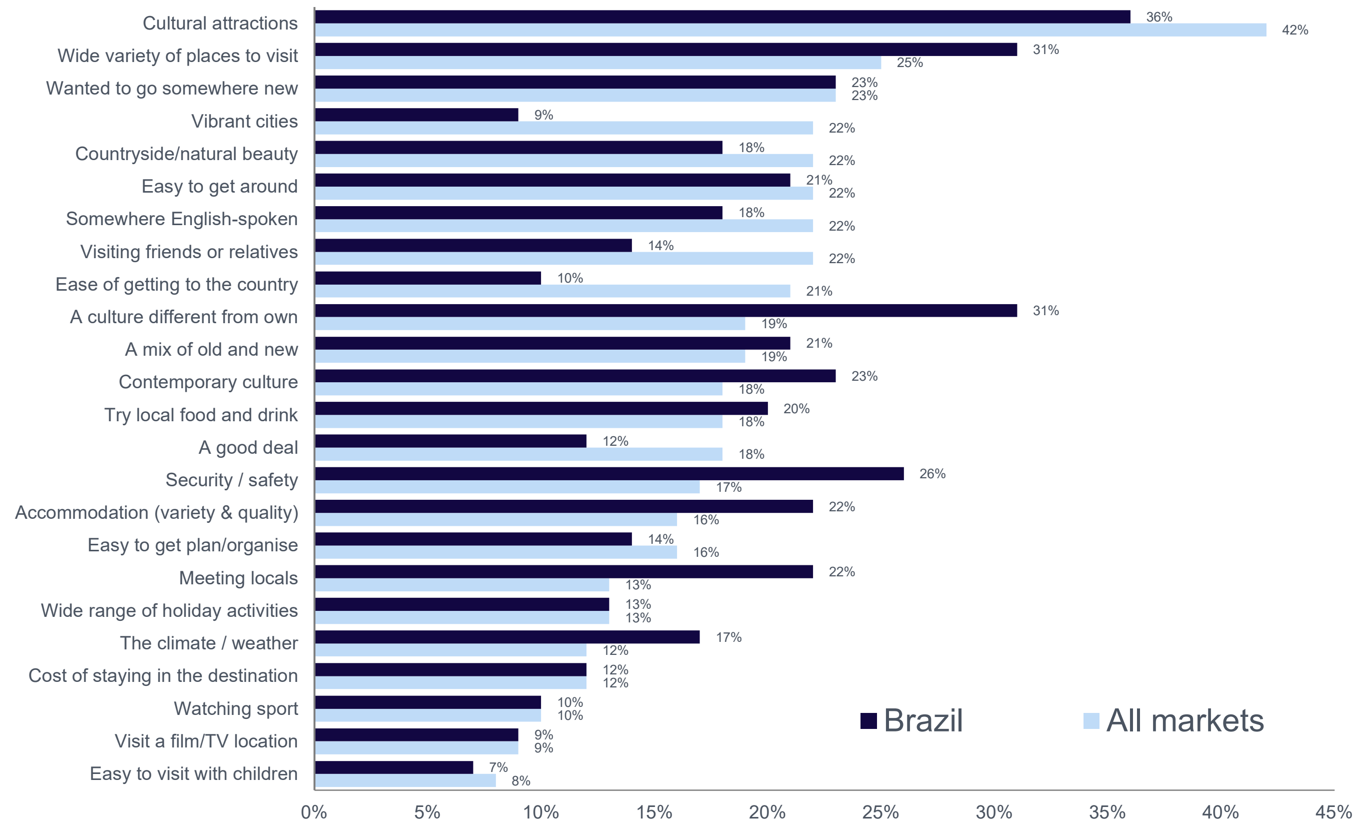
## Holiday wants and % saying destination is best place for…

| Importance | Attribute (20 least important) | GB | FR | IT | AU | US | GE |
|---|---|---|---|---|---|---|---|
| 6.10 | Enjoy high quality food and drink (gourmet food) | 13% | 70% | 68% | 16% | 20% | 29% |
| 6.05 | Do something the children would really enjoy | 33% | 36% | 39% | 44% | 79% | 26% |
| 6.04 | Easy to get around by public transport | 50% | 51% | 42% | 30% | 52% | 46% |
| 6.00 | Have dedicated time with my other half | 40% | 70% | 69% | 38% | 44% | 40% |
| 5.96 | Soak up the atmosphere | 22% | 42% | 51% | 34% | 36% | 38% |
| 5.96 | Be physically healthier | 26% | 36% | 40% | 43% | 34% | 26% |
| 5.88 | Meet the locals | 42% | 34% | 67% | 42% | 25% | 17% |
| 5.85 | Visit places important to my family's history | 13% | 22% | 44% | 10% | 31% | 25% |
| 5.60 | Do something environmentally sustainable/ green | 31% | 38% | 38% | 49% | 19% | 41% |
| 5.57 | Go somewhere that provided lots of laid on entertainment/nightlife | 46% | 52% | 51% | 34% | 73% | 36% |
| 5.54 | Feel special or spoilt | 14% | 29% | 32% | 19% | 21% | 11% |
| 5.53 | Chill/ slow down to a different pace of life | 14% | 22% | 31% | 20% | 22% | 13% |
| 5.48 | Party | 38% | 31% | 46% | 33% | 52% | 23% |
| 5.47 | Revisit places of nostalgic importance to me | 24% | 38% | 41% | 16% | 24% | 27% |
| 5.46 | Get some sun | 10% | 18% | 25% | 42% | 34% | 13% |
| 5.43 | Meet and have fun with other tourists | 15% | 36% | 35% | 10% | 41% | 27% |
| 5.34 | Experience adrenalin filled adventures | 15% | 25% | 22% | 51% | 52% | 16% |
| 5.33 | To participate in an active pastime or sport | 17% | 28% | 31% | 43% | 50% | 23% |

*Source: VisitBritain/Arkenford 2013, base: international travellers from Brazil*

# 2.3 Perceptions of Britain

## Motivations for choosing Britain as a holiday destination




*Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)*

# 2.3 Perceptions of Britain

## Sought-after Britain activities


*Source: Anholt Nation Brands Index, powered by Ipsos 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. Top 20 activities shown; for full list please see report at https://www.visitbritain.org/understanding-international-visitors*

# Chapter 3:
# Understanding the market

# 3.1 Structural drivers: general market overview

## Demographics & Society

In 2019, Brazil's population reached 211 million, becoming the sixth largest country in the world by population. It is expected to reach 219 million by 2025.

The population in Brazil is relatively young. In 2019, only 9% of the population was aged 65 years or older.

Brazil is a culturally diverse country owing to waves of immigration, both during the three centuries of Portuguese rule and slave trade from Africa, as well as European arrivals after the World Wars in the 20$^{th}$ Century.

After a severe recession in late 2015 and 2016, the Brazilian economy has been recovering and investors' confidence in Brazil is returning.

The forecast for GDP growth shows an anticipated 11% increase between 2018 – 2025. The forecast is positive, although fiscal/pension reforms are necessary to drive this growth which the Government has been trying to pass into legislation since 2018.

**Brazil is the 6$^{th}$ largest country by population**

*Source: Oxford Economics, CIA World Factbook 2019, Statistics Canada*

# 3.1 Structural drivers: demographic and social indicators

## Population dynamics

| Measure | 2019 estimate |
|---|---|
| Total population | 211,246,300 |
| Overall growth rate vs 2018 | +0.75% |
| Average annual rate of population change in 2015 - 2020 | 0.39% |

| Indicator | 1980 | 2015 | 2030 | 2050 |
|---|---|---|---|---|
| Median age (in years) | 20.3 | 31.4 | 37.6 | 45.1 |

Brazil has the largest population in South America with 211 million recorded in 2019.

As of 2019, only 9% of the population is aged 65+ but beyond the 2030s, age structures are expected to shift, resulting in a shrinking labour force and a more prominent elderly subsection of society.

The majority of Brazilians live along or close to the Atlantic Coast, with many living in urban areas (87%). The cities of São Paulo and Rio de Janeiro are the largest and richest municipalities, home to approximately 10% and 6% of Brazil's population, respectively. Both municipalities are located in the southeast region of Brazil, the most populous region in the country.

Brazil is a culturally diverse country. It is estimated that about half of the population have European ancestry (e.g. Germany, Italy, Poland, Portugal, Spain) paired with many that record African descent. A part of the population, especially in the Southeast of Brazil, have Japanese roots.

*Source: Oxford Economics, CIA World Factbook 2019, UN World Population Prospects 2019*

# 3.1 Structural drivers: economic indicators

## Economic indicators
(% growth unless stated)

| Indicator | 2017 | 2018 | 2019 | 2020 |
|---|---|---|---|---|
| Real GDP | 1.3 | 1.3 | 1.1 | 2.0 |
| Consumer spending | 2.0 | 2.1 | 1.9 | 2.2 |
| Unemployment rate | 12.7 | 12.3 | 12.0 | 11.1 |

| Measure | 2018 |
|---|---|
| GDP per capita PPP (US$) | 15,296 |
| Annual average GDP growth over past decade (%) | 1.2 |
| Annual GDP growth in 2018 (%) | 1.3 |

Brazilian GDP per capita and consumer spending has been slowly recovering since 2017, after sustained economic depression in 2015 and 2016.

Economic activity is mainly concentrated in the southeast, comprised of a sizeable manufacturing base and mineral riches. Areas of development include foreign trade and domestic savings.

The unemployment rate has remained relatively stable, recording a 12% average in 2019.

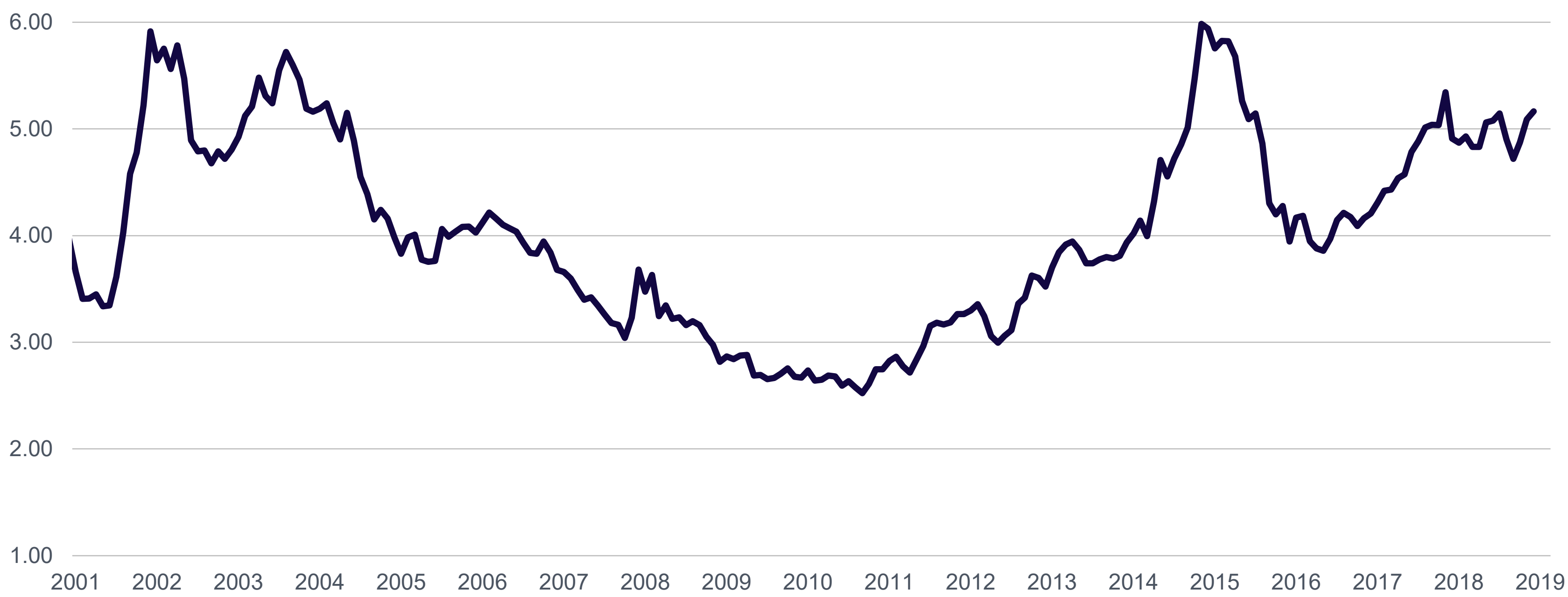
According to Capgemini, Brazil ranked 18th, counting 186,000 High Net Worth Individuals (HNWI) in 2018; defined as people with investible assets worth more than US$1 million.

Whilst the HNWI population increased 8% in 2018, HNWI wealth declined 2.7% YOY.

*Source: Oxford Economics, CIA World Factbook 2019, Capgemni World Wealth Report 2019,*

# 3.1 Structural drivers: exchange rate trends

## Exchange rate trends (cost of GBP in BRL)




Please visit our website to find the most up-to-date exchange rate trend based on monthly averages

*Source: Bank of England*

# 3.2 Consumer trends

Brazil has the largest tourism economy in Latin America. Its outbound overnight travel market is forecasted to grow by 15% between 2018-2023.

An important reason for the growth in outbound travel is the economic recovery in Brazil. The size of the middle classes is rising again; therefore more Brazilians can afford long haul international travel.

Many Brazilians have European ancestry. Paired with the cultural and historical ties between Brazil and Europe, this creates a natural interest for Brazilians to travel to Europe for either a holiday or for visiting friends and relatives. Cultural attractions, shopping, sports events and education are other important motivators for Brazilians to visit Europe.

Portugal is especially popular among Brazilians as the country was once a Portuguese colony. Both countries share the same language, removing the barrier of communication.

**43%**

of Brazilian visits to the UK were a part of a multi-country trip in 2016

*Sources: Oxford Economics, ETC, UNWTO, International Passenger Survey by ONS, 2016*

# 3.2 Consumer trends: overall travel trends

## Travel trends

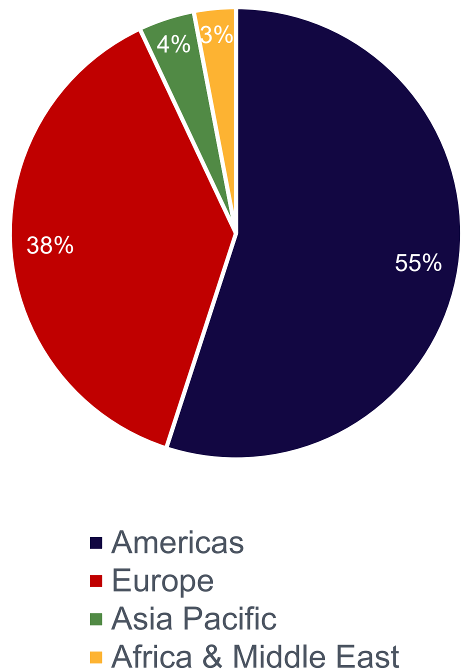
Many Brazilians combine their trip to the UK with an overnight stay in one or more other countries. 13% visited a country on the way to the UK; 9% visited a country on the way home from the UK and 21% included at least one night in another country both on the way to/from the UK.

More than half of overnight trips outside Brazil were spent in the Americas during 2018, mostly in the USA and Argentina. Four in ten overnight visits were spent in Europe in 2018.

Brazil's e-commerce market is growing as Brazilians become comfortable with making online purchases. Most online purchases are made via desktop or laptop, with mobile sales growing.

The majority of long haul travellers use social media to look for special offers and share their thoughts/ opinions about travel destinations.

Destination of overnight visits abroad in 2018




*Source: Oxford Economics, International Passenger Survey by ONS, Qordoba, ETC*

# 3.3 Booking and planning

A large proportion of Brazilian holiday visitors start thinking about their trip early, with 58% doing this as early as six months or more in advance.

37% of travellers booked within the three-to-six month window before arrival into Britain; more than one fifth did so more than six months in advance and more than a fifth between one and two months in advance.

The majority of Brazilian travellers to Britain book travel and accommodation together (67%), mostly online (61%) or face-to-face (31%) with a travel seller.

Brazilians are more likely than the average visitor to purchase tickets for tourist attractions, sporting events and guided sightseeing tours *prior* to their trip.

**58%**

of Brazilian visitors start thinking about their trip to Britain 6+ months in advance

*Source: VisitBritain/IPSOS 2016, base: visitors*

# 3.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked: travel only

| Booking method | Brazil | All markets |
|---|---|---|
| Online | 68% | 85% |
| Face-to-face | 27% | 10% |
| By phone | 4% | 4% |
| Don't know | 1% | 1% |

Most Brazilians book their travel to the UK online, especially when reserving accommodation. The majority of online bookings are made via a laptop/desktop.

About 67% of Brazilian visitors to the UK book their travel and accommodation together which is above the all-market average of 50%. About three-in-ten bookings were made face-to-face with a travel seller for these holiday packages.

How trips to Britain were booked: accommodation only

| Booking method | Brazil | All markets |
|---|---|---|
| Online | 74% | 70% |
| Face-to-face | 15% | 7% |
| By phone | 1% | 3% |
| Did not book/stayed with friends/relatives | 10% | 17% |
| Don't know | 0% | 2% |

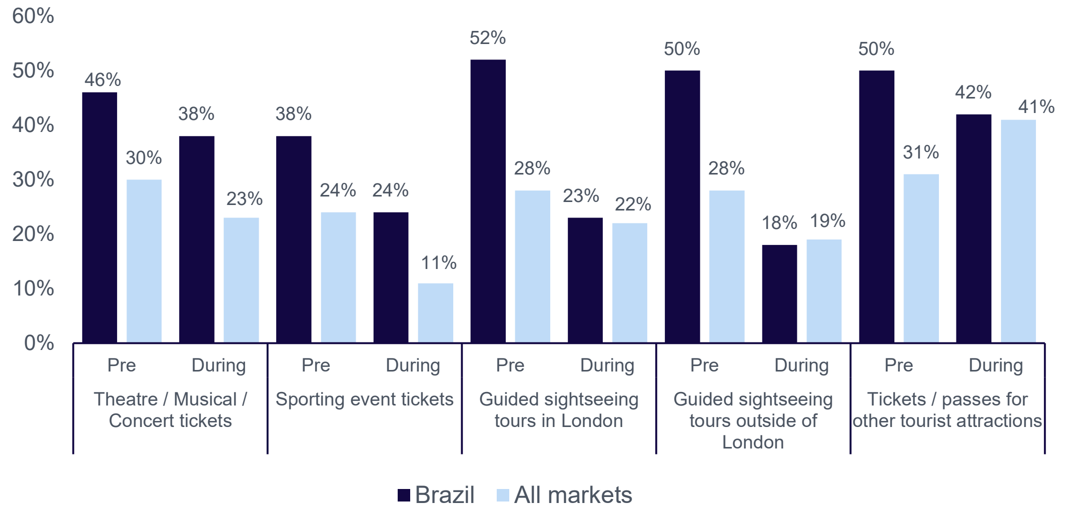
How trips to Britain were booked: travel and accommodation (holiday)

| Booking method | Brazil | All markets |
|---|---|---|
| Online | 61% | 64% |
| Face-to-face | 31% | 27% |
| By phone | 8% | 8% |
| Don't know | 1% | 1% |

*Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey*

# 3.3 Booking and planning: booking channels and ticket sales

Propensity to make a purchase before or during trip




Many Brazilian visitors booked their holiday activities before they start their journey. Most popular are tickets for guided sightseeing tours and for miscellaneous tourist attractions.
Some tickets are booked during the trip by Brazilian visitors, mostly for tourist attractions and theatre, musical and/or concert tickets.

*Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified), online survey*

# 3.3 Booking and planning: lead-times

## Decision lead-time for visiting Britain

### Starting to think about trip

| Lead time | Brazil | All markets |
|---|---|---|
| 6+ months | 58% | 45% |
| 3-6 months | 28% | 31% |
| 1-2 months | 9% | 13% |
| Less than 1 month | 4% | 5% |
| Don’t know | 1% | 3% |

### Deciding on the destination

| Lead time | Brazil | All markets |
|---|---|---|
| 6+ months | 41% | 32% |
| 3-6 months | 37% | 38% |
| 1-2 months | 17% | 19% |
| Less than 1 month | 4% | 7% |
| Don’t know | 1% | 3% |

### Looking at options/prices

| Lead time | Brazil | All markets |
|---|---|---|
| 6+ months | 36% | 21% |
| 3-6 months | 35% | 37% |
| 1-2 months | 21% | 27% |
| Less than 1 month | 8% | 12% |
| Don’t know | 1% | 4% |

### Booking the trip

| Lead time | Brazil | All markets |
|---|---|---|
| 6+ months | 23% | 14% |
| 3-6 months | 37% | 32% |
| 1-2 months | 22% | 28% |
| Less than 1 month | 15% | 21% |
| Don’t know | 2% | 5% |

*Source: VisitBritain/IPSOS 2016, base: visitors*

# 3.3 Booking and planning: lead-times

## Decision lead-time for visiting Britain: commentary (tables on previous page)

Brazilian travellers to Britain show a higher tendency to start thinking earlier about their trip to the destination than the global average. 58% start thinking about their trip more than six months in advance compared to 45% across all markets.

41% of Brazilian travellers made their decision to travel to Britain more than six months before the actual journey; another 37% made their decision three to six months before departure.

36% of Brazilian visitors reviewed options and prices more than six months in advance, which is higher than the all-market average of 21%. Another 35% reviewed options and prices between three-to-six months ahead of the trip and an almost equal share booked their trip in that same period.

About two thirds of Brazilian visitors to Britain booked their travel and accommodation together, which is higher than the all market average of 50%. 64% of Brazilians who book such a combined holiday make use of a travel agent / tour operator / travel comparison website. 19% book their combined holiday directly with the transport company and another 17% book directly with the accommodation provider.

*Source: VisitBritain/IPSOS 2016, base: visitors*

# 3.4 Reaching the consumer

Friends and relatives, travellers' reviews and information from search engines play an important role for Brazilian travellers when choosing their destination.

Technology is key for Brazilians when they travel; being more 'connected' than residents from other Latin American countries when on holiday.

The highest number of social media users in Brazil live in the Southeast region of the country. Brazil's most populous cities are São Paulo and Rio de Janeiro, are located in this region.

TV is still the primary medium for Brazilians to obtain news and entertainment; however, digital media consumption has high penetration and is growing.

Brazil is the second most engaged country with social media, spending on average three hours and 45 minutes per day. YouTube is the most used channel, followed by Facebook, WhatsApp and Instagram. Twitter ranked #6 followed by LinkedIn at #7. Snapchat was ranked #10.

**Facebook**
remains a popular platform in Brazil, only behind the USA and India in usage.

*Source: VisitBritain/IPSOS 2016, comScore Media Metrix 2015, PwC's Global Entertainment and Media Research, GlobalWebIndex 2019*

# 3.4 Reaching the consumer

## Broadcast media

- TV is the preferred medium for Brazilians to obtain news and entertainment with 93% of the population watching TV regularly each day. **TV Globo** dominates as the preferred free-to-air channel with **Record** and **SBT** as a distant second and third, followed by **BAND**. News, films, reality programming, variety shows (on weekends) and evening soap operas (novellas) are the most popular programs although ratings are dropping owing to the impact of streaming services, social media and digital video on the internet.
- The Pay TV customer base is 16.34 million (as of August 2019), experiencing a 1.5 million decrease in subscribers in the previous 12-month period.
- Netflix is the #1 streaming service in Brazil with more than 10 million subscribers. GloboPlay, the TV Globo owned streaming platform is a distant second, with a quarter of this figure. Amazon Prime is a small player within the market.

## Newspapers

- The average time spent reading newspapers by Brazilians per day is one hour and 10 minutes.
- Brazilians continue to migrate from print to digital newspaper platforms – in 2019, there was a 33% rise in digital subscriptions for those outlets which have electronic editions.
- Daily newspapers with the highest circulation (print and web - # indicates rank) in 2019 that reach the affluent class A / B segments include **Folha de São Paulo** (#1), **O Globo** (#3), **O Estado de São Paulo** (#3), **Zero Hora** (#4), **Correio Braziliense** (#7), **Estado de Minas** (#8), **A Tribuna** (#19), **O Tempo** (#20).
- **Catraca Livre, G1, R7, Terra, UOL** and **Yahoo! News** are popular online news and information websites sites in Brazil.

*Source: Statista, Anatel, Reuters Institute*

# 3.4 Reaching the consumer

## Radio

- 83% of Brazilians listen to the radio (terrestrial and/or digital streaming) daily, for an average of 4.5 hours.
- Music is the most popular radio format, followed by news and traffic information.
- Podcasts grew in popularity during 2019 with YouTube and Spotify being the most popular platforms to listen. 50 million Brazilians listen to podcasts regularly, primarily from Classe A & B.

## Magazines

- The magazine sector has consolidated, with many titles now online-only or have been closed down by major publishers such as Editora Abril and Editora Globo.
- Weekly celebrity, news and sport outlets attract the highest number of readers. Within the travel/lifestyle space, readership is much smaller, but targeted towards and consumed by affluent Brazilian consumers.
- Key travel print titles include **Viaje Mais**, **Viajar Pelo Mundo** and **Top Destinos**. **Falando de Viagem, Viaje Na Viagem** and **Viagem e Turismo** are popular online travel content websites.

## Online media

- About 149 million Brazilians use the internet, equating to 70% of the Brazilian population. 85% of this figure use the internet daily. Average time spent online per day is 4 hours and 45 minutes – third in the world.
- Two thirds of internet users access the web from their smart phone.
- There is high social media penetration in Brazil - YouTube (95%), Facebook (90%), WhatsApp (89%), Instagram (71%), Facebook Messenger (67%) and Twitter (43%)
- By 2020, there will be more than 100 million WhatsApp users in Brazil, equating to 98% of all online messages.

*Source: Poder360, Meio & Mensagem, Inteligencia,, Hootesuite We Are Digital Report 2019/ eMarketer*

# 3.4 Reaching the consumer: social media on holiday

## Use of social media on holiday


87% of Brazilian international travellers used social media during their last holiday abroad, higher than the all-market average of 71%. Many used social media during their holiday to keep in touch with people at home and/or to post photos of their holiday.

YouTube dominates the social media platforms in Brazil in terms of daily usage, followed by Facebook and Instagram.

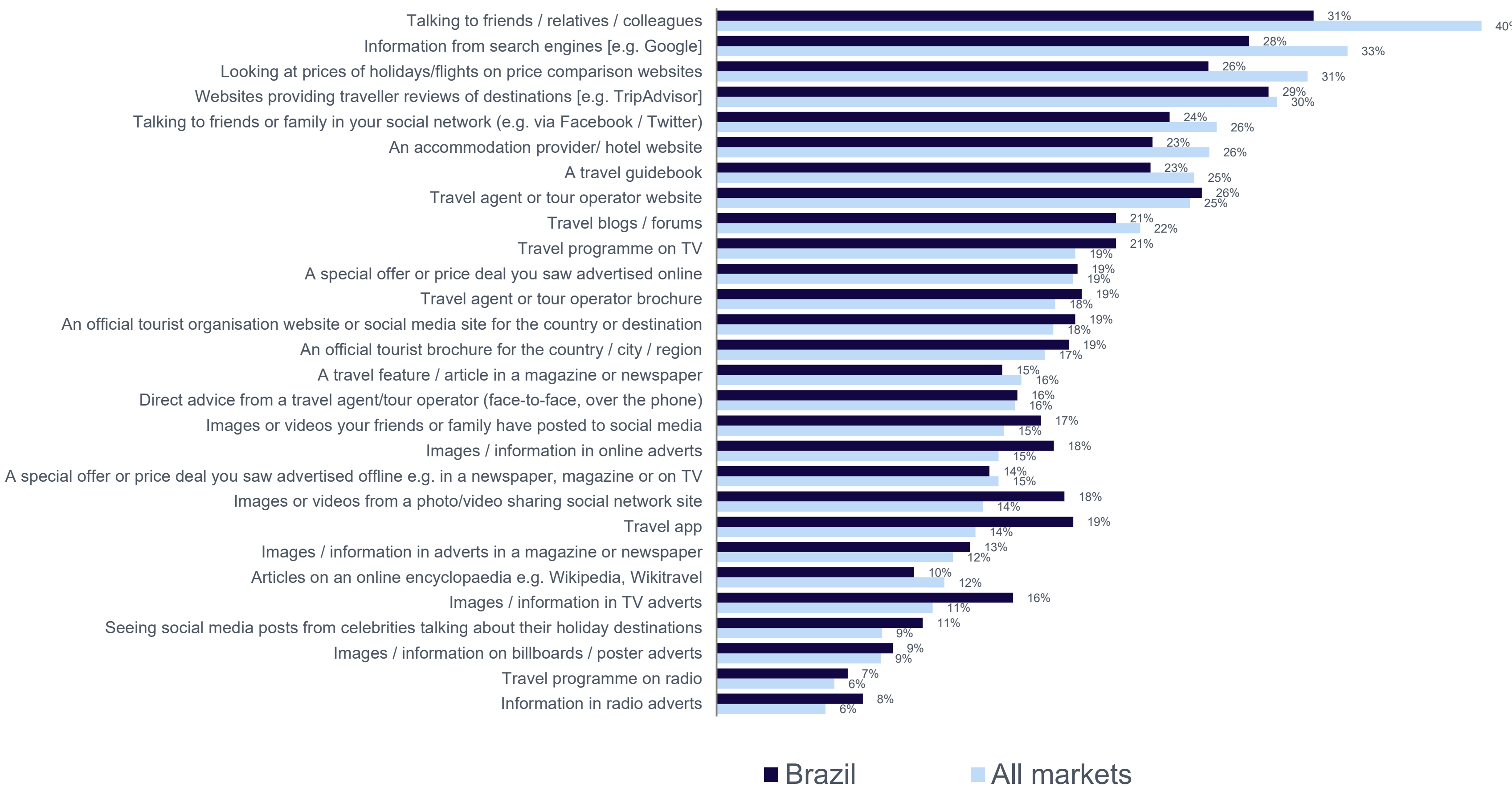
Brazilian international travellers have a higher than average usage of smartphones and tablets when on holiday. 9-in-10 visitors regard their smartphone as an essential item whilst they go on holiday (compared to 73% all-market average).

In general, 74% of Brazilians enjoy writing reviews on social media about places they visited on holiday, and a similar proportion place trust in social media reviews from other tourists. This is much higher than the all-market average of 42% and 54%, respectively.

*Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?*

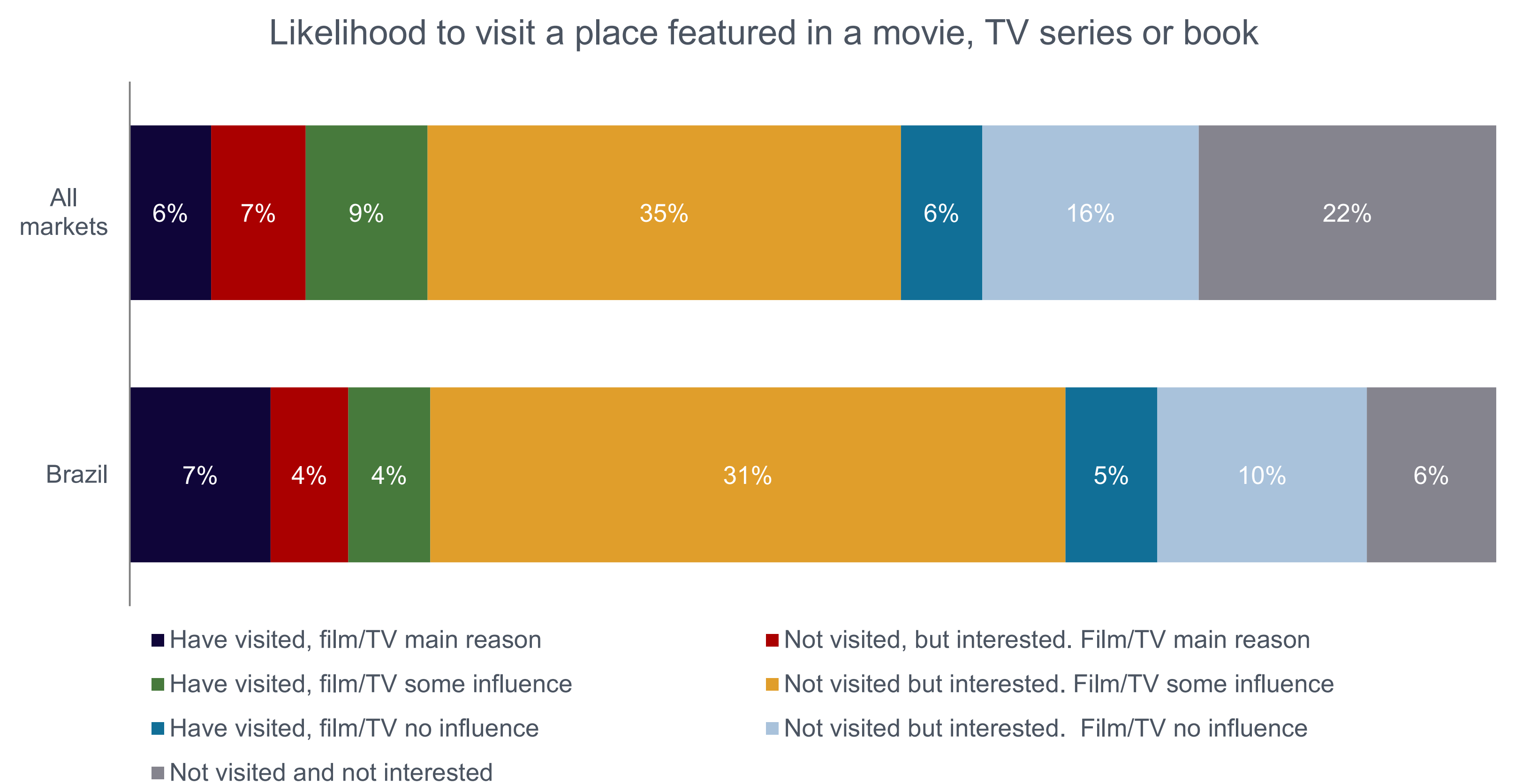
# 3.4 Reaching the consumer: influences

## Influences on destination choice




*Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)*

# 3.4 Reaching the consumer: influences




*Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?*

Chapter 4:

# Access and travel trade

# 4.1 Access: key facts

20% of Brazilian visitors arrive through the Channel Tunnel as part of a multi-country trip, which is almost as twice as high as the all-market average. 77% of Brazilians arrive by plane to the UK.

After a decrease in 2016 and 2017, airline capacity has been returning since 2017 and reached 381,810 seats in 2019, up 15% on 2018.

The international airports in the cities of São Paulo and Rio de Janeiro held 66% and 34% respectively of seat capacity between Brazil and the UK in 2019.

British Airways (São Paulo GRU and Rio de Janeiro GIG) and LATAM Airlines (São Paulo GRU) serve non-stop routes to London Heathrow (LHR). Norwegian launched flights between Rio de Janeiro (GIG) and London Gatwick (LGW) in March 2019.

Virgin Atlantic Airways will launch daily flights between São Paulo (GRU) and London Heathrow (LHR) in March 2020.

20% of Brazilian visitors arrive to the UK through the Channel Tunnel.

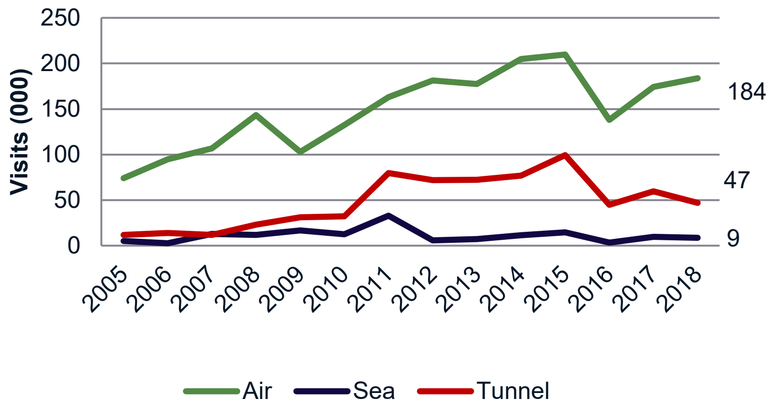
## Access to Britain*

| Measure | 2019 |
|---|---|
| Weekly aircraft departures | 24 |
| Weekly aircraft seat capacity | 7,342 |
| Airports with direct routes in Brazil | 2 |
| Airports with direct routes in Britain | 2 |

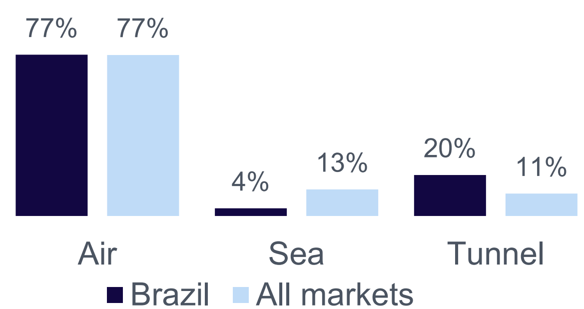
*Source: International Passenger Survey by ONS, Apex 2019: non-stop flights only*

# 4.1 Access: mode of transport

Visits by mode of transport

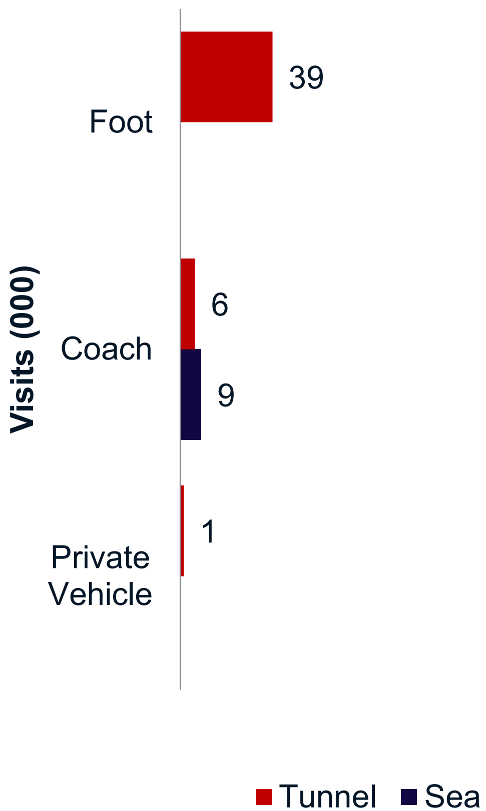



Annual share by mode (2018)



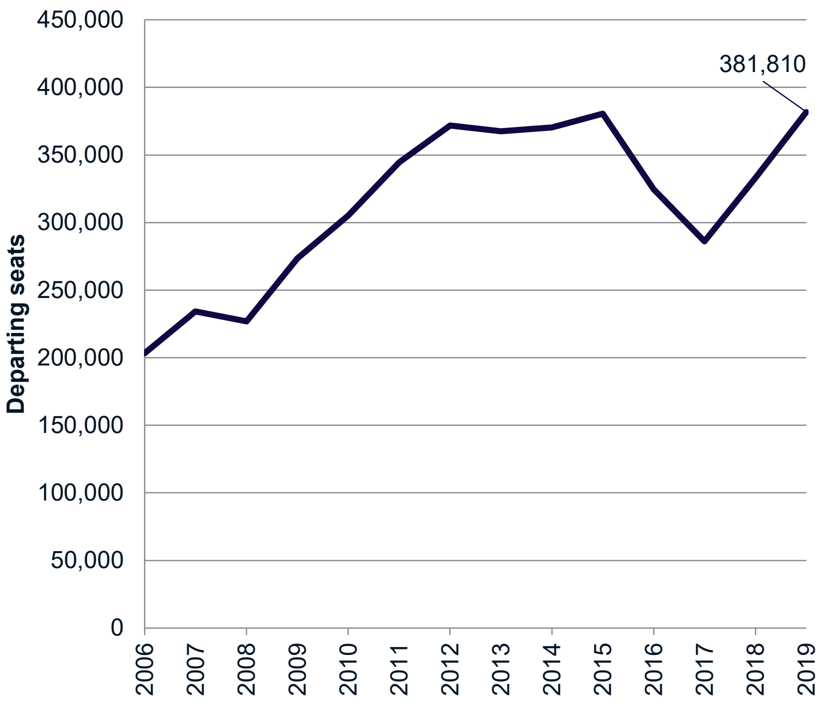

*Source: International Passenger Survey by ONS*

Sea and tunnel travel (000s) in 2018

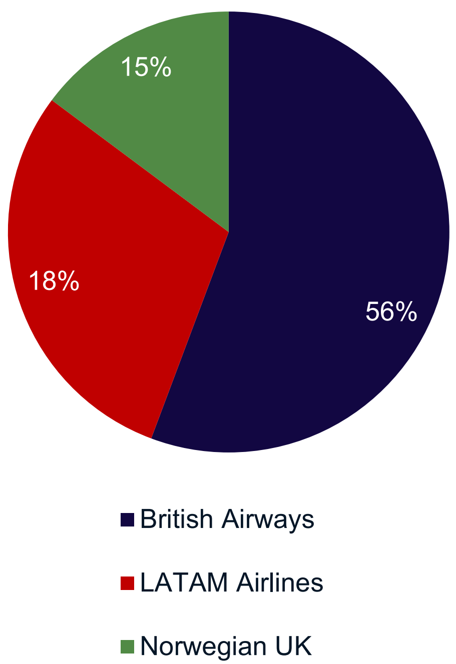


# 4.1 Access: capacity

## Annual airline seat capacity trends




## Airline seat capacity by carrier (2019)



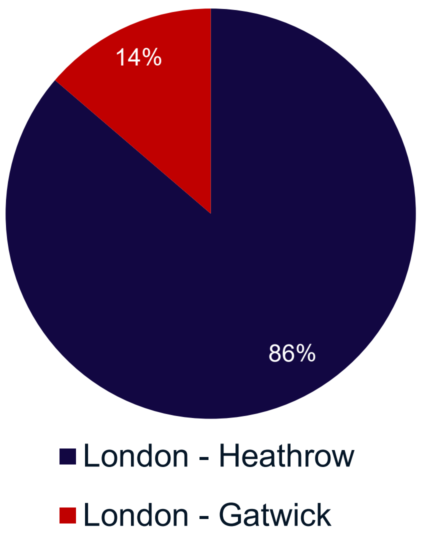

*Source: Apex 2019: non-stop flights only*

# 4.1 Access: capacity

Origin airport annual seat capacity (2019)


Virgin Atlantic will begin daily service between São Paulo (GRU) to London Heathrow (LHR) on 29, March 2020

Destination airport seat capacity (2019)




*Source: Apex 2019: non-stop flights only*

# 4.2 Travel trade: general overview

Brazil's travel trade consists predominantly of travel agencies that sell products provided by tour operators to the end consumer. To a lesser extent, agents sell their own packages or bespoke itineraries. Tour operators within the market often specialise in specific areas of the world; such as Europe, USA, the Caribbean, or within market areas such as leisure, corporate, MICE etc.

Since Brazil's economic crisis officially came to an end in early 2017, the country's travel trade sector has evolved. There has been much consolidation with operators purchasing its competitors and other agencies. For example, CVC created a holdings company in 2018 and has since purchased Experimento, RexTur Advance, Grupo Trend, Visual Turismo and OTA Submarino Viagens. Many operators and agencies also went out of business.

In 2020, significant tour operators within the Brazil market that sell Britain include: ABREU, Agaxtur, Alatur, CVC Viagens, Flytour Viagens, MMTGapnet, Newit, New Age, Orinter Tour & Travel, Primetour, Queensberry and Teresa Perez.

Brazilian travel trade develop preferred business relationships with suppliers that offer Portuguese speaking staff. Staff that speak Spanish is a distant secondary preference.

Many agencies and tour operators are growing their focus on niche markets, especially within the luxury segment. This has allowed agencies and operators to distinguish their business from online booking platforms, providing personalised service and the ability to curate bespoke travel experiences/itineraries for their clients.

# 4.2 Travel trade: general overview

## Trade Exhibitions

Brazil has two large annual trade shows located in São Paulo (WTM Latin America - early April and ABAV - late September),

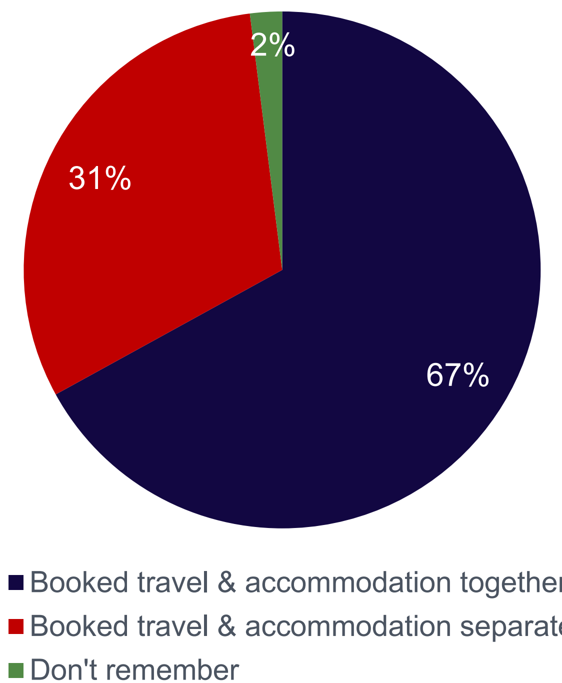
Some operators organise their own trade events, such as Hiperfeirão Flytour, as well as regional events by the national tour operator association BRAZTOA.

ILTM Latin America each late April/early-to-mid May (previously Travelweek São Paulo) is a popular luxury travel trade show. Each year, a select group of premium travel agents and tour operator professionals from across Brazil and Latin America are invited to participate; engaging with luxury tourism product from around the world during a three-day program with scheduled meetings, networking events and parties.

Other popular regional travel fairs for the trade include FesTuris in Gramado, RS (southern Brazil) each early-to-mid November and the rebranded Brazil Travel Market (formally JPA Travel market) now in Fortaleza, CE (northeast Brazil) in mid-to-late October.

## Travel and accommodation booking

More than two thirds of Brazilian holiday visitors to Britain book their travel and accommodation together.




*Source graph on the right: VisitBritain/IPSOS 2016*

# 4.2 Travel trade: Brazilian holiday calendar

## National public holidays

| 2020 | 2021 | National public holidays |
|---|---|---|
| 1 January | 1 January | New Year's Day |
| 24 – 25 February | 15 – 17 February | Carnival |
| 10 April | 10 April | Good Friday |
| 21 April | 21 April | Tiradentes Day |
| May 1 | 1 May | Labor Day / May Day |
| 11 June | 11 June | Corpus Christi Day |
| 7 September | 7 September | Independence Day |
| 12 October | 12 October | Our Lady Aparecida/ Children's Day |
| 2 November | 2 November | All Souls' Day |
| 15 November | 15 November | Republic Proclamation Day |
| 25 December | 25 December | Christmas Day |

***Note: Many states and cities have their own public holiday schedules. Be sure to check before confirming visit dates.***

*Source: www.timeanddate.com/holidays/brazil/*

# 4.2 Travel trade: practical information

## Where to find the trade

Most tour operators have head offices in the Greater São Paulo metropolitan area, with travel trade contacts spread throughout Brazil. Other cities of importance include Brasília, Belo Horizonte, Curitiba, Porto Alegre,
Rio de Janeiro and other cities in São Paulo state such as Campinas and Riberão Preto.

## Weather

Weather varies across Brazil owing to its immense size. Located in the Southern Hemisphere, its seasons are the opposite to those in Britain.

São Paulo has a temperate climate, ranging from 15°C in winter to around 35°C in summer. Rio de Janeiro is warmer with temperatures ranging from the 20°Cs in winter to the low 40°Cs in summer.

Expect cooler weather in Southern Brazil. For example, in Porto Alegre, temperatures can be close to freezing in the winter months and in the 30°Cs during summer.

## Time difference

Brazil is three hours behind Greenwich Mean Time (GMT), and four hours behind when Britain observes Daylight Saving Time (DST). Brazil no longer observes DST.

## Transport

In São Paulo's city centre or travel to/along Avenida Paulista, use the metro (subway) for short journeys. This is often the quickest form of transport if your travel to and from points are close to stations.

In other cities across Brazil, public transport can be unreliable and limited in its reach. Uber is widely available and provides an easy point-to-point travel solution.

Taxis can also be hailed at hotels, from the street or picked up at stands (pontos) across each city.

Traffic is often a major issue in most Brazilian cities. Always leave plenty of time for travel between appointments.

# 4.2 Travel trade: planning cycle and etiquette

## Planning cycle

January to March is the main time of year for planning and building products for the European and North American summer. August to October is another important period.

Many Brazilians book their travel in the fourth quarter and in January of each year.

## Business meeting etiquette

Normal European business attire is standard dress code for business in Brazil. Slightly more casual dress can be acceptable in the north and northeast of the country owing to the warmer, tropical climate.

Appearance is extremely important in Brazil. First impressions can count for a lot when establishing a business relationship with Brazilians.

Punctuality can sometimes be more flexible in Brazil, certainly in relation to British standards. However, if late for a business meeting, advise your Brazilian client – they will usually understand.

Most large cities in Brazil have heavy traffic issues, so incorporate plenty of time for travel between confirmed appointments.

Meetings will normally take longer than the allocated time. Owing to the importance of personal relationships in Brazil, always allow time for small talk before starting business discussion. On arrival, it is considered good manners to greet each person in the room individually with a handshake. Anticipate water and espresso to be served in every meeting.

Personal relationships are the key to business success in Brazil. Your relationship with clients will be with an individual rather than a company, so changing personnel can be a setback to the development or maintenance of business in the market.

## Hospitality etiquette

Eating out is an important social activity in Brazil. As a result, business lunches and dinners are an important part of doing business. This links back to the importance of developing personal relationships with your business contacts in Brazil. It is a good opportunity to socialise with your clients and help them build their trust in you.

Hectic appointment schedules, protracted meetings and bad traffic can often mean you and/or your client could be late for scheduled meetings.

# 4.3 Caring for the consumer

## Accommodation

Brazilians like to shop while travelling abroad to take advantage of cheaper prices on consumer goods. Therefore, many travel with numerous pieces of large luggage. Their preference is for a spacious hotel room, ideally with storage space for their bags. This also affects their transport needs and assistance with luggage on arrival and departure.

Breakfast is a staple of any hotel stay in Brazil. Ensure their room rate includes this.

Brazilians take cleanliness seriously: ultra clean rooms are crucial for guest satisfaction.

Expectation levels for standards and services are high. Brazilians are not used to tipping staff, having an expectation that any service charge will be added into the overall price.

Location is an important factor in deciding on accommodation, with a preference for centrally located properties or those close to public transport.

Brazilians appreciate hotels with Portuguese speaking staff.

## Language

Portuguese is the official language in Brazil. Only a very small percentage of Brazilians speak English, approximately five percent.

## Language basics

| English | Brazilian Portuguese |
|---|---|
| Please | Por favor |
| Thank you | Obrigado(a) |
| Yes | Sim |
| No | Não |
| Sorry (apology) | Desculpe-me |
| Excuse me (pardon) | Com licença |
| Sorry, I do not speak Portuguese. | Desculpe-me, eu não falo português. |

# 4.3 Caring for the Consumer

## Food and Drink

A Brazilian breakfast is light. It includes fruit, coffee, milk, cheese, cold meats, cereals, bread and butter; usually accessed from a buffet. Brazilians are not used to eating a heavy breakfast; however, many like to experiment with a traditional English breakfast while visiting Britain.

Lunch is usually a more substantial meal, eaten between 12.00 to 14.30. Dinner is often eaten late between 20.30 to 22.30. Meals are sociable occasions and Brazilians will take their time to enjoy them.

Preferred alcoholic drinks include beer, caipirinha (Brazilian cocktail), vodka, wine and whisky. Gin has also greatly gained in popularity.

Brazilians are very comfortable paying for goods and services with a credit card.

Brazil does not have a tipping culture. Brazilians expect any service charge to be included in the total bill. They may tip if service is truly excellent.

In the latest research available, 55% of Brazilian visitors to the UK were extremely satisfied with their food and drink, which is above average for all visitors to the UK. Another 30% were quite satisfied.

In the latest research available, 29% of Brazilians that consider visiting Britain on holiday in the future say that ‘sampling the local food and drink’ is a reason or motivator for visiting.

*Source: GFK NBI 2015, International Passenger Survey by ONS 2015, VisitBritain/IPSOS 2016*

# 4.3 Caring for the Consumer

## Language tips for arrival and departure

| English | Brazilian Portuguese |
|---|---|
| Hello | Olá |
| My name is… | Meu nome é… |
| Welcome to Britain | Bem-vindo à Grã-Bretanha |
| Pleased to meet you | É um prazer conhecê-lo(a) *or* Muito prazer |
| How are you? | Como vai? *Or* Tudo bem? |
| Enjoy your visit | Aproveite sua visita! |
| Goodbye | Até logo |
| Did you enjoy your visit? | Você gostou de sua visita? |
| Have a safe journey home | Boa viagem de volta |
| Hope to see you again soon | Espero revê-lo(a) em breve |

Appendix

# Useful links and further information

# Appendix 1: Working with VisitBritain

## We can help you extend your reach through:

Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest

Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots

Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory

Retailing your product through the VisitBritain shop

Joining the Tourism Exchange GB platform–giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.

Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search

or trade website
or contact the B2B events team
or campaign partnerships team
or trade support team
or VisitBritain shop team

# Appendix 1: Working with VisitBritain

## VisitBritain's strategy to grow tourism to 2025

**Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since November 2015

**Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.

**Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.

**Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

'I Travel For…' campaign

The tourism sector deal

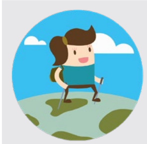
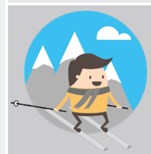
# Appendix 1: Working with VisitBritain

## VisitBritain's global audience segments

In 2017-2019, VisitBritain carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit: Understanding our customers.

In Brazil, VisitBritain focuses on three audience segments among the international travellers:

- **Buzzseekers:** Trendsetters seeking out new experiences and always looking for action and excitement
- **Explorers:** Like to go places that are off the beaten track as well as visit top attractions at a relaxed pace

| **Segments** (& global attributes) | Global market share | Market share in Brazil |
|---|---|---|
|  **Buzzseekers** (free spirited and spontaneous, they like holidays full of action and excitement) | 38% | 36% |
|  **Explorers** (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace) | 23% | 20% |
|  **Adventurers** (they live to go off the beaten track, spending time outdoors and trying out new experiences) | 16% | 21% |
|  **Sightseers** (they prefer staying within comfort zone, preferring cities to countryside, planning in advance) | 12% | 15% |
|  **Culture Buffs** (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations) | 12% | 7% |

Source: VisitBritain/Kubi Kalloo, 2017

# Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about Brazil or other inbound markets browse

our markets & segments pages or

our inbound research & insights or

contact us directly
(Email: research@visitbritain.org)

# Appendix 2: Useful market-specific research resources

We have dedicated market specific research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Technology and social media
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about Brazil or other inbound markets browse our markets & segments pages.

Or our inbound research & insights.
Or contact us directly.

# Appendix 3: Definitions, sources and information on this report

## How to read the information in this market profile

### Details on main sources

The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. You can find out more and consult the release calendar, on our IPS webpage.

**Oxford Economics** last updated the 'Global Travel Service' databank on 8th November 2019.

**Apex** was last updated with December 2019 data.

**UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, January 2020.

**VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.

The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July 2019 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples.

# Appendix 3: Definitions, sources and information on this report

## How to read the information in this market profile

### Useful definitions and abbreviations

**VFR** means Visiting Friends and/or Relatives.

**Misc** journey purpose means Miscellaneous – other journey purposes.

In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.

**High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

### Other useful information

**Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2017. Where an activity was asked about more than once, only the most recent answers were taken into account.

**Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.

**Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

# Market and Trade Profile: Brazil

*February 2020*