Market and Trade Profile: Brazil

Brazil

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Brazilian travellers and who they are. It takes a look at Britain and its competitive set, as well as activities of Brazilian visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Brazilian consumer trends, booking patterns, planning and the travel behaviour of this source market. Perceptions of Britain held by Brazilians are also highlighted.
- **Chapter 3: Access and travel trade** outlines how Brazilians travel to the UK, how to best cater for their travel needs and wants as well as offering insights into how to work with the Brazilian travel trade. The chapter also outlines how suppliers can work with VisitBritain in the Brazil market.

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Chapter 1:
Inbound market statistics

Chapter 1: Inbound market statistics

Chapter summary

- Brazil’s outbound travel market is anticipated to increase. According to Oxford Economics, the market is forecast to account for almost 10.6 million overnight trips abroad by 2020. This is an increase of 24% compared to 2016.
- 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 destinations.
- Brazilians rank in 23rd place globally for international tourism expenditure with US$14.5bn spent in 2016.
- Brazil is the 36th largest inbound source market for the UK and the 29th most valuable for visitor spend in 2016.
- Brazil was in deep recession during 2016, causing a decrease in arrivals and spend. Both have rebounded during the first half of 2017. There were 136,000 visits to the UK in this period, up 49% on the first half of 2016 (5% below the first six months of 2015*, a record year for arrivals from Brazil) and spend was up 91% at £141 million.

Visits from Brazil to the UK were up 49% in the first half of 2017*

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, VisitBritain/IPSOS 2016
** provisional data*

Chapter 1.1: Key statistics

Key insights

- Brazil's outbound travel market is in recovery. After a drop in 2016 owing to economic recession, the number of overnight visits from Brazil to the UK is forecasted to increase significantly during the next decade.
- Brazilians have the tendency to visit in even numbers throughout the year. In 2016, arrivals were level during all quarters.
- Holiday visits continue to lead the volume of arrivals from the Brazilian market; 58% of visits were made for holiday purposes in 2016.
- Brazilian visitors spent an average of 11 nights per visit in the UK during 2016, longer than the global average.
- London is the leading destination for Brazilian visitors; 70% of Brazilian nights were spent in London between 2014-2016.
- 94% of departing Brazilian travellers in 2016 would be "very" or "extremely likely" to recommend Great Britain for a holiday or short-break.

89%

of departing Brazilian holiday visitors felt "very" or "extremely" welcome in Great Britain in 2016

Source: Oxford Economics, International Passenger Survey by ONS, CAA 2016 (asked to leisure visitors)

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	14.5
Global rank for international tourism expenditure	23
Number of outbound overnight visits (m)	8.6
Most visited destination for overnight visits	USA

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	131	2,483	139
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*
Share of UK total in 2016	0.5%*	0.7%*	0.9%*

Source: International Passenger Survey by ONS, UNWTO (as of November 2017), Oxford Economics
** After a weak 2016, both visit and spend levels from Brazil to the UK have rebounded in the first half of 2017. There were 136,000 visits in the first half of 2017 – 49% more that in the first half of 2016 and just 5% below the first six months of 2015 (provisional data).*

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	187	-42%	36
Nights (000s)	2,006	-28%	34
Spend (£m)	196	-23%	29

After a weak 2016, both visit and spend levels from Brazil to the UK have rebounded in the first half of 2017. There were 136,000 visits in the first half of 2017 – 49% more that in the first half of 2016 and just 5% below the first six months of 2015**.

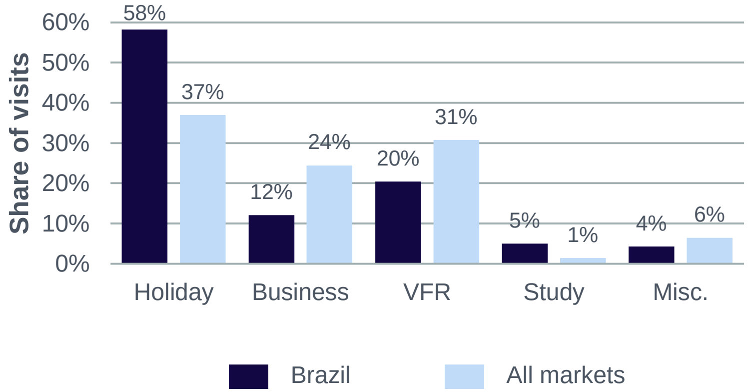
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	6	£121	£690
Business*	7	£208	£1,473
Visiting friends/ relatives*	16	£41	£674
All visits	11	£98	£1,052

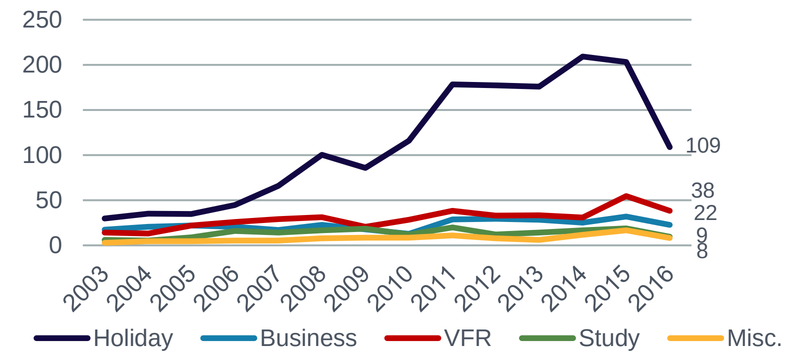
Source: International Passenger Survey by ONS
** small base*
*** provisional data*

1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



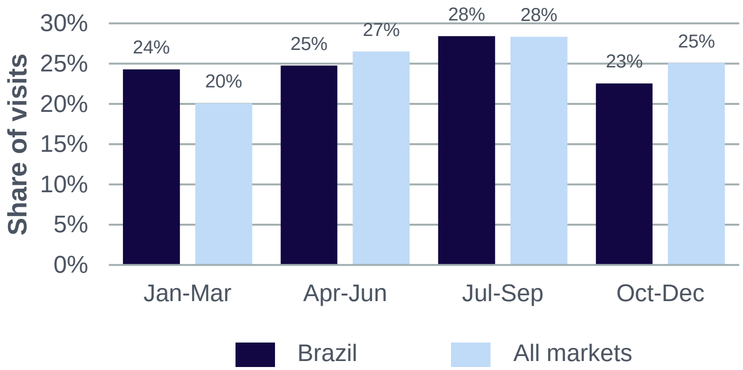
- In 2016, 58% of all visits to the UK from Brazil were made for holiday purposes. 20% were to visit friends and/or relatives.
- 36% of holiday visits from Brazil to the UK (excl. UK Nationals) in 2016 were made by repeat visitors. On average, a Brazilian holidaymaker has come between 1 and 2 times to the UK in 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).

- Despite the sharp decline in 2016 caused by Brazil's economic recession, holiday visits continue to lead in terms of visit volume from the Brazilian market.
- Brazil's economy in Q1 2017 recorded growth, ending its deepest recorded recession ever.
- The country's outbound travel market is also in a state of recovery after 2016. Visit levels from Brazil to the UK have rebounded in the first half of 2017. There were 136,000 visits in the first half of 2017, which is 49% more than in the first half of 2016 and just 5% below the first six months of 2015*.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015
** Provisional data*

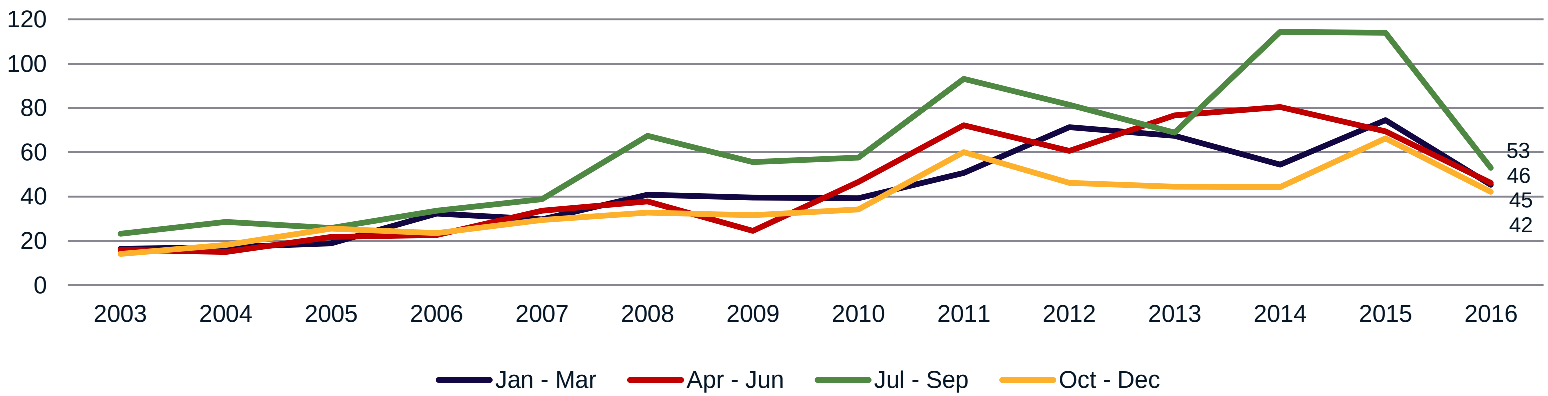
1.1 Key statistics: seasonality

Seasonality 2016



- The third quarter (July to September), which is the winter period in Brazil, attracts the most Brazilian visitors. In 2016, 28% of visits from Brazil to the UK were made in this third quarter. Visitation in other quarters was evenly spread. Brazilians visit the UK more often in the first quarter of the year compared to the average UK visitor.
- Due to the economic recession in Brazil the volume in all quarters in 2016 declined compared to 2015.

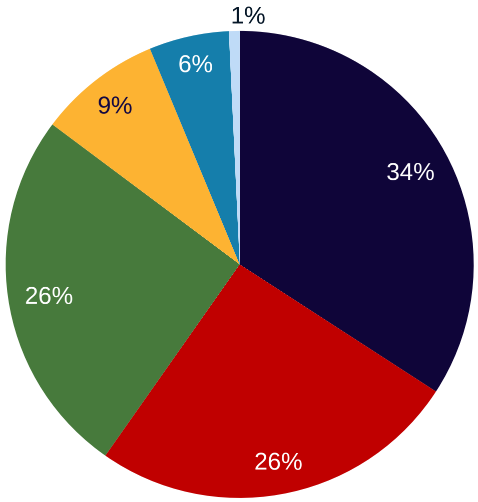
Seasonality trend (visits 000s)



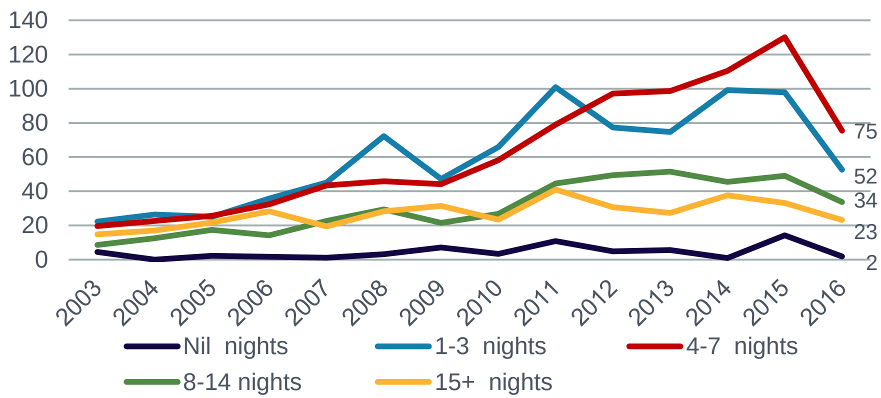
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, % share)



Duration of stay trend (visits 000s)



- Brazilian visitors spent an average of 11 nights per visit in the UK during 2016, longer than the global average of 7 nights. While holiday visitors stay an average of 6 nights, the same as the global average, Brazilians visiting family and/or friends as well as study visitors tend to stay for longer.
- The most common length of stay for Brazilian travellers to the UK was 4-7 nights, followed by short trips of 1-3 nights.*
- More than one third of nights were spent for free in the house of relatives or friends in the UK in 2016. Another 26% of nights were spent in a hotel or guest house. 26% 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.*

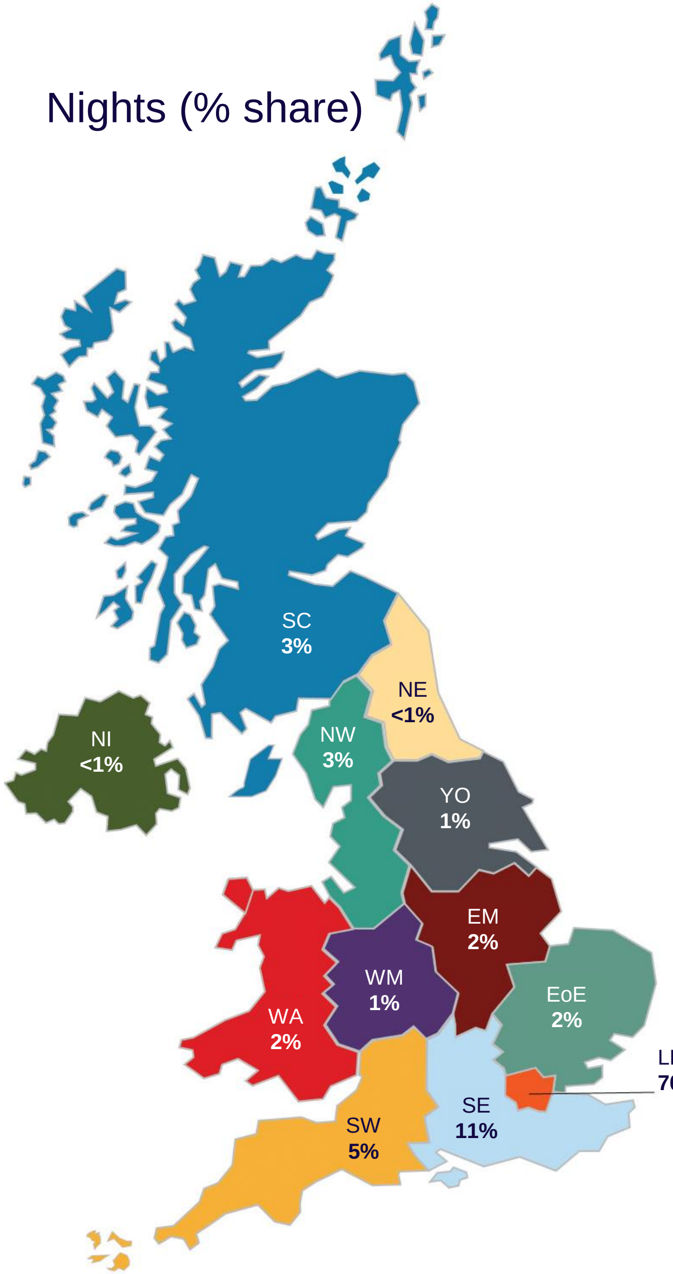
1.1 Key statistics: regional spread

Nights & visits to the UK (2014-2016 averages)

Region*	Nights stayed** (000)	Visits (000)
Total	2,557	268
Scotland (SC)	84	13
Wales (WA)	48	2
Northern Ireland (NI)	1	<1
London (LDN)	1,785	221
North East (NE)	1	1
North West (NW)	76	11
Yorkshire (YO)	30	4
West Midlands (WM)	22	7
East Midlands (EM)	56	2
East of England (EoE)	58	8
South West (SW)	115	9
South East (SE)	280	22
Nil nights (Nil)	n/a	6

Source: International Passenger Survey by ONS (2014-2016 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*

Nights (% share)

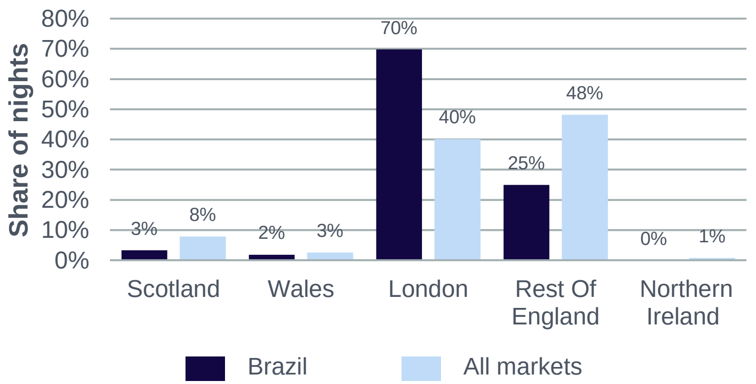


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited (2014-2016 averages)

Town	Overnight visits (000s)
London	221
Edinburgh	10
Oxford	5
Liverpool	5
Manchester	4

Regional spread 2014-2016

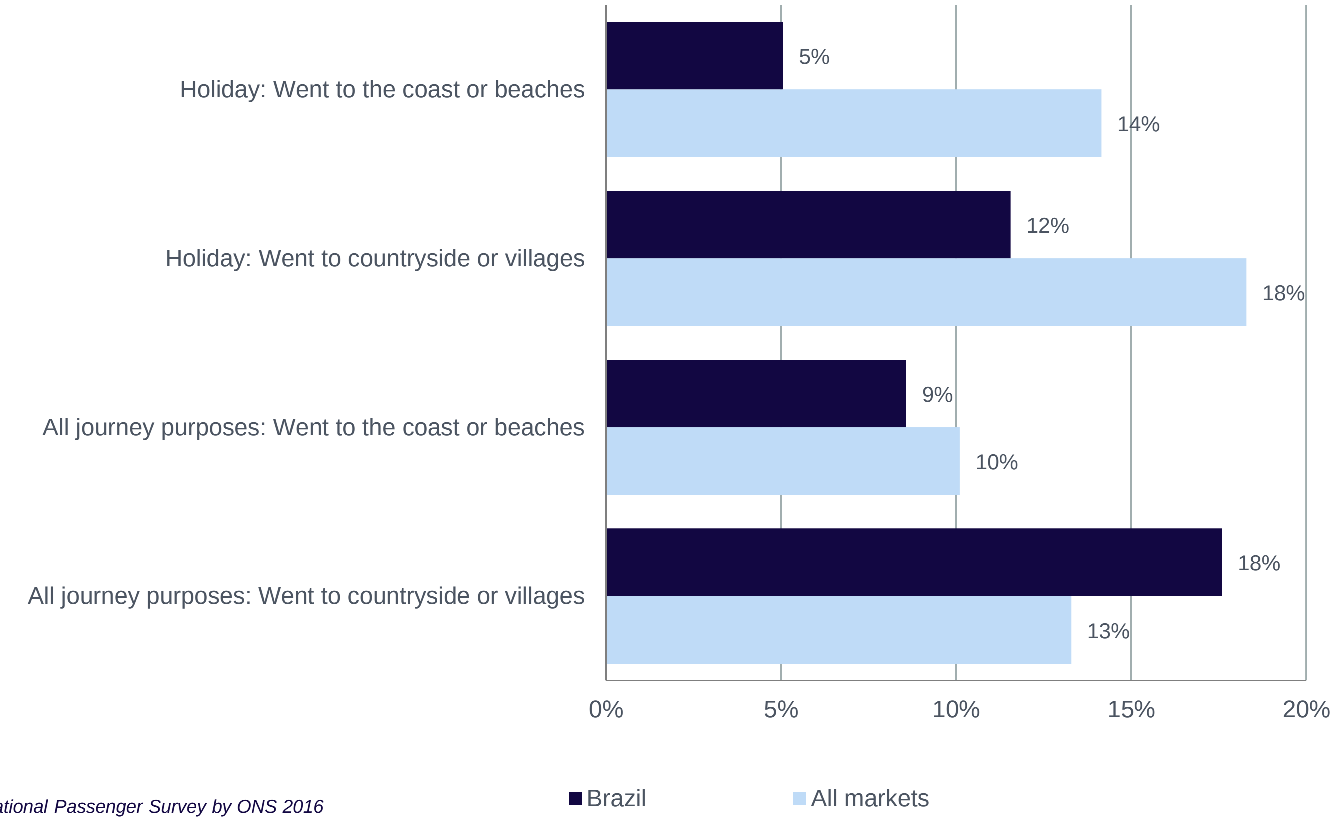


Source: International Passenger Survey by ONS

- Most Brazilian visitors stay in London, accounting for 70% of visitor nights between 2014 to 2016, much higher than the global average. 25% of visitor nights were spent in other parts of England.
- Brazilians are less likely to stay in Scotland. 3% of nights in the period 2014 to 2016 were spent there, compared to a global average of 8% of all international nights spent.
- Holidaymakers from Brazil have a below average propensity to visit rural and coastal areas of Britain on their trip.
- Brazilian visitors tend to be comfortable with taking public transport in cities, showing above-average use of the bus, tube, tram or metro (79% compared to an all-market average of 53%).

1.1 Key statistics: visits to coast, countryside and villages

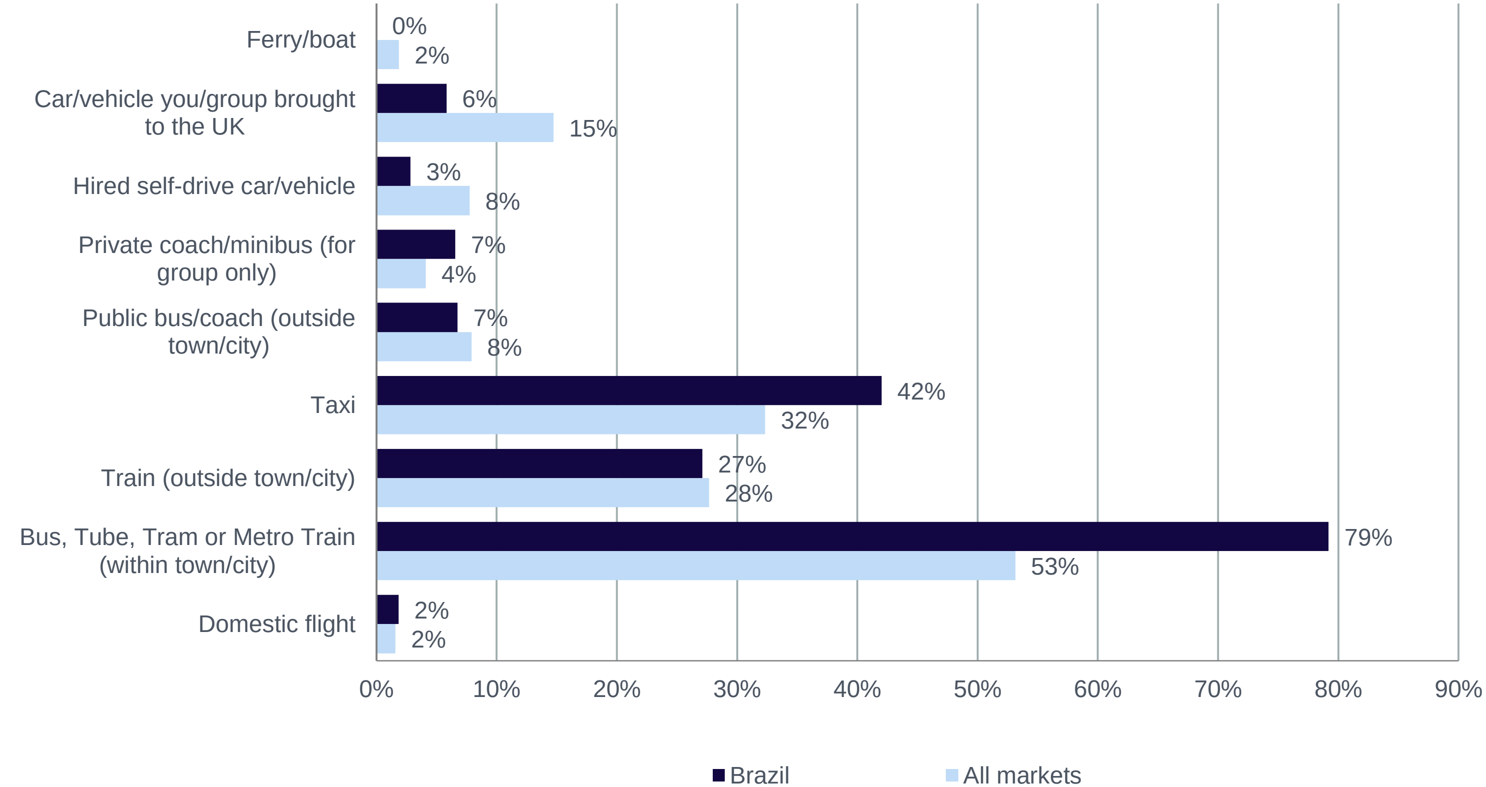
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

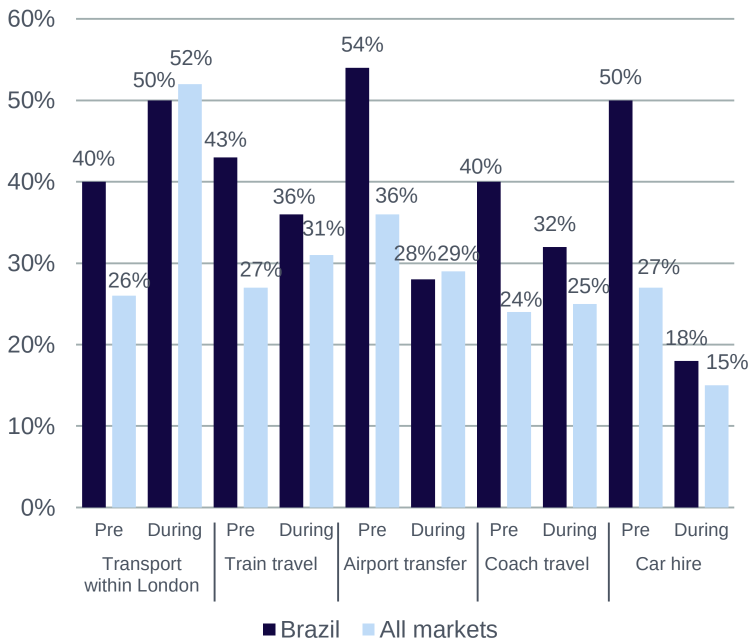
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS 2013

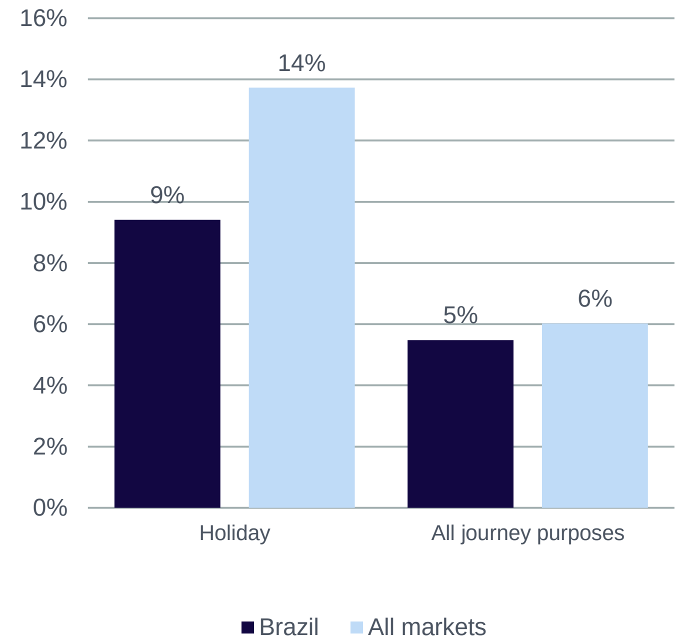
1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



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

Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.

1.2 Visitor demographics

Visitor characteristics

- Brazilian business visitors in the UK are more than two times as likely to be male than female.
- Brazilian visitors to the UK are predominantly aged 25 to 44 years (52% compared to the all-market average of 44%).
- The largest proportion of Brazilian visitors who came to the UK in 2016 reside in the city of São Paulo (48%), followed by the city of Rio de Janeiro (23%).
- 88% of visits from Brazilian residents to the UK were made by Brazilian nationals, 5% by British nationals.
- 36% of Brazilian holiday visitors (excl. UK nationals) made a repeat visit to Britain.
- 89% of departing Brazilian holiday visitors felt “very” or “extremely” welcome in Great Britain in 2016.

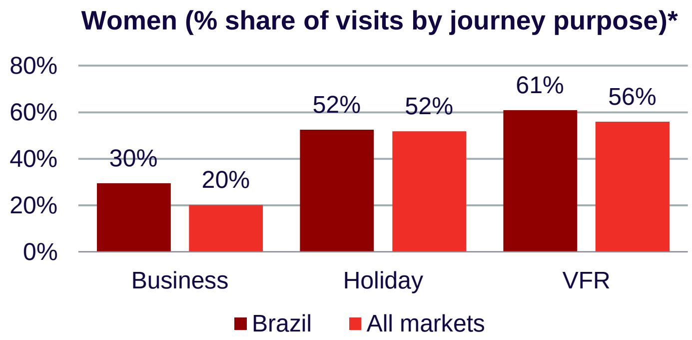
94%
of Brazilian travellers are “very” or “extremely” likely to recommend Great Britain for a holiday or short-break (2016)

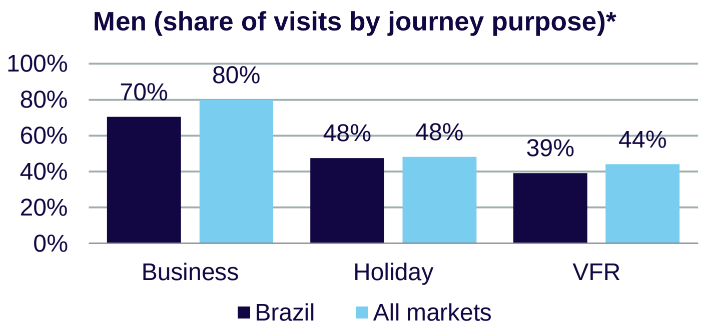
Source: International Passenger Survey by ONS, CAA 2016 (asked to leisure visitors)

1.2 Visitor demographics: gender and age groups

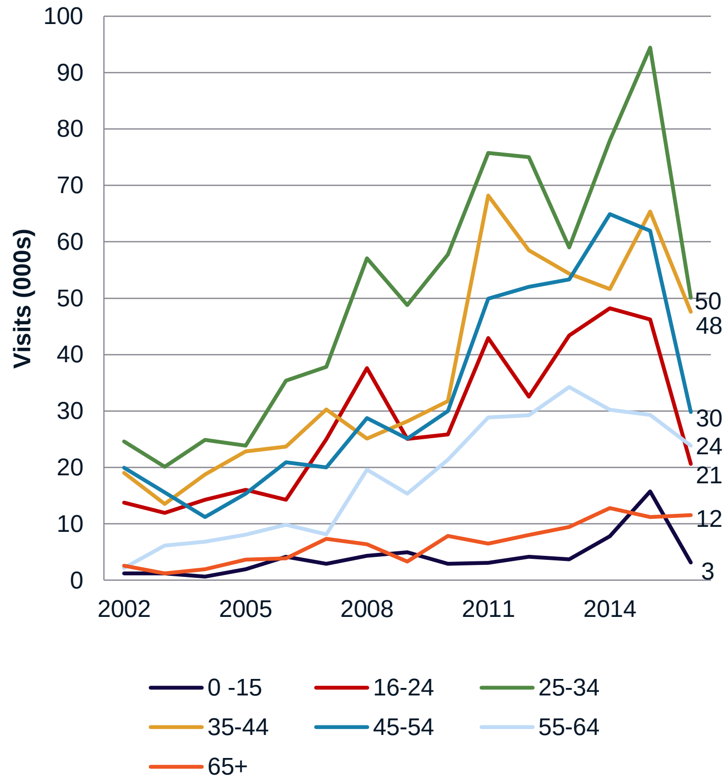
Visitor demographics

Gender ratio of visits from Brazil*:
48% women, 52% men





Age group trend

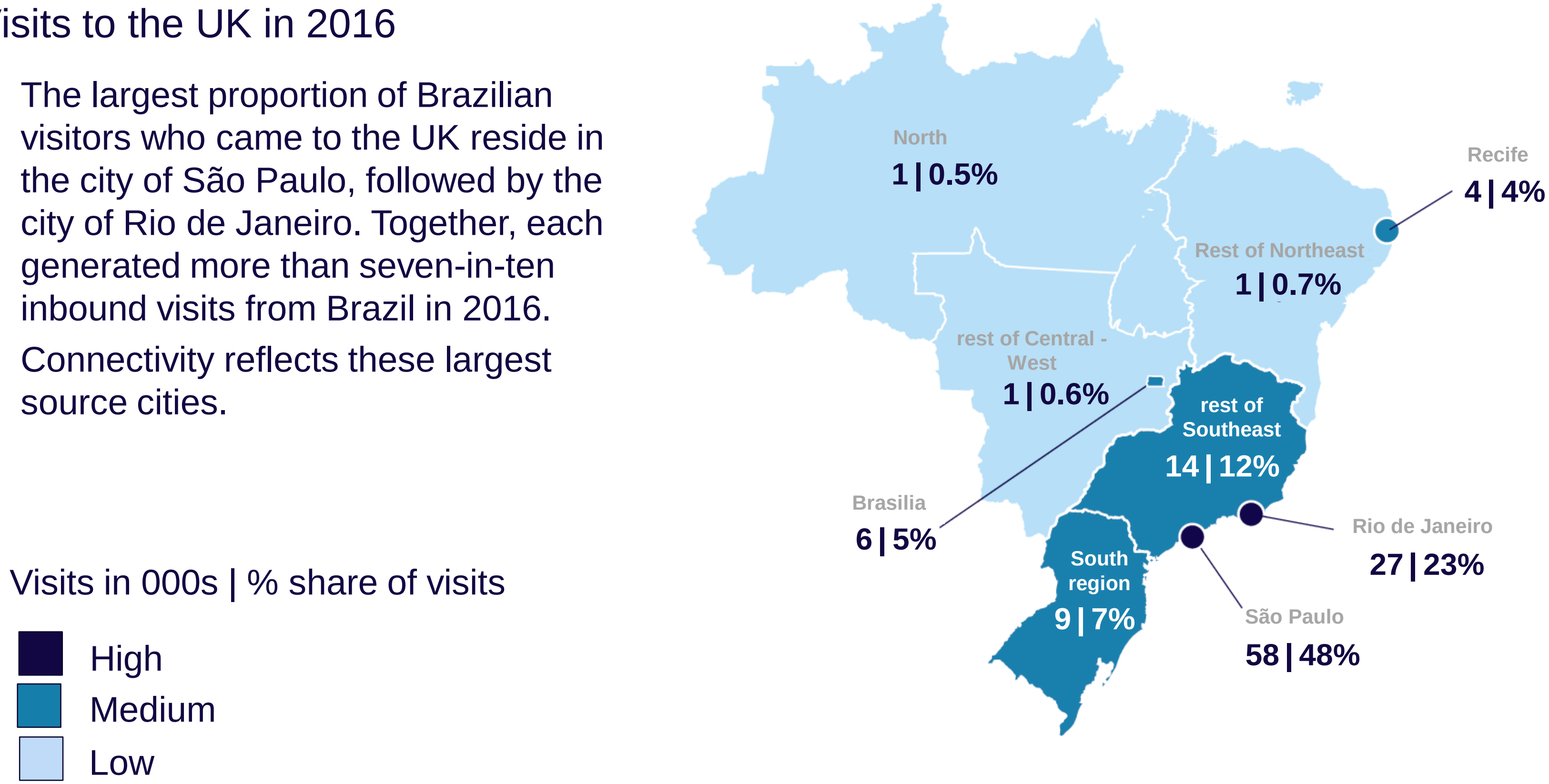


Source: International Passenger Survey by ONS
** Data in this graph is based on 2014-2016 data*

1.2 Visitor demographics: origin

Visits to the UK in 2016

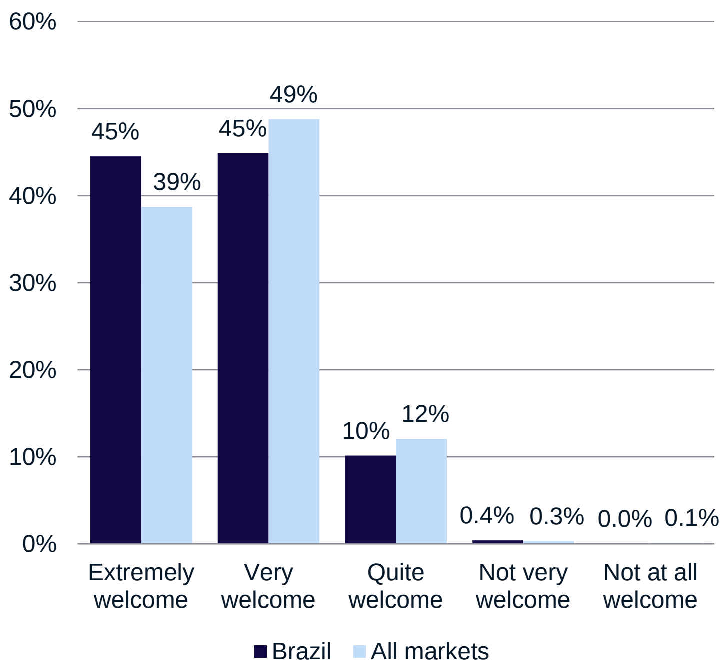
- The largest proportion of Brazilian visitors who came to the UK reside in the city of São Paulo, followed by the city of Rio de Janeiro. Together, each generated more than seven-in-ten inbound visits from Brazil in 2016.
- Connectivity reflects these largest source cities.



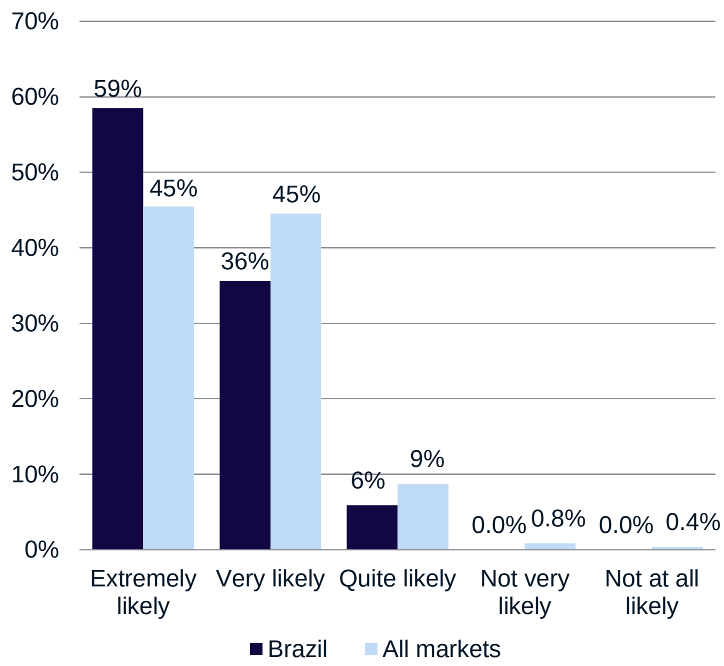
Source: International Passenger Survey by ONS, 2016

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016 (asked to leisure visitors)

1.3 Britain and its competitors

Market size, share and growth potential

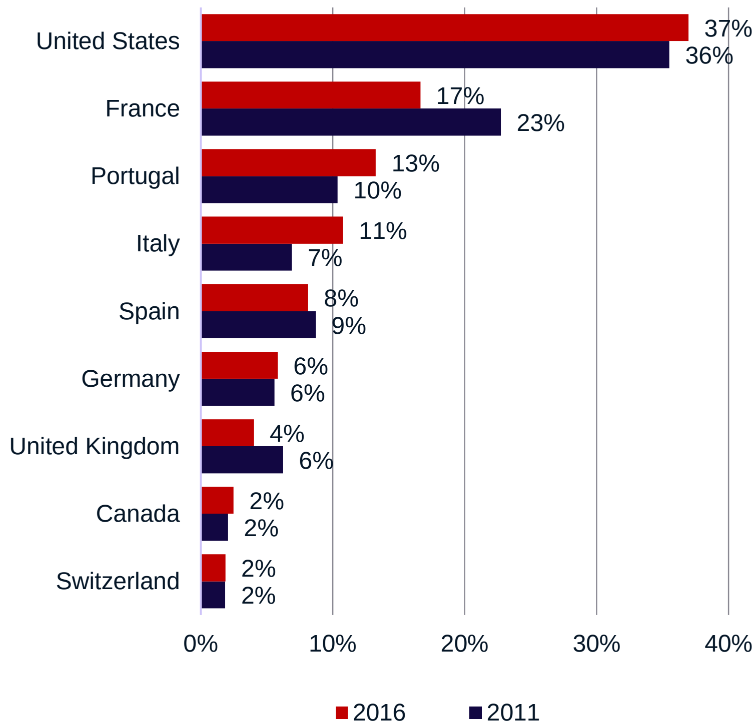
- The USA, Argentina and France were the most visited destinations by Brazilian overnight visitors in 2016, with the UK holding 12th position.
- Brazil's outbound travel market is recovering in 2017 from a decline caused by Brazil's economic recession during 2016.
- The number of overnight visits from Brazil to the UK is forecasted to increase significantly during the next decade.
- Of those who came to Great 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, Italy and Portugal recorded the highest growth in market share in terms of Brazilian outbound overnight trips in the period of 2011 to 2016, of +4 and +3 percentage points respectively.

Source: Oxford Economics, VisitBritain/IPSOS 2016

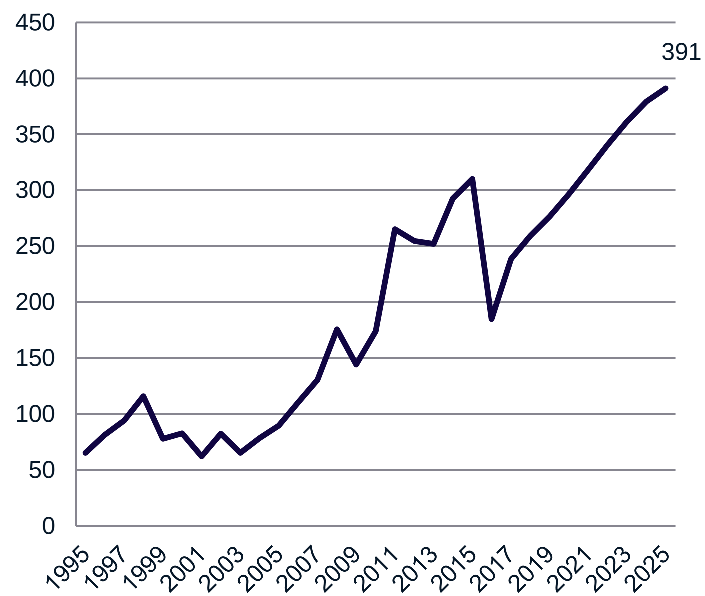
Forecast of overnight visits from Brazil to the UK in the period 2016 to 2025: +112%

1.3 Britain and competitors

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



Historic and potential overnight visits from Brazil to the UK (000s)

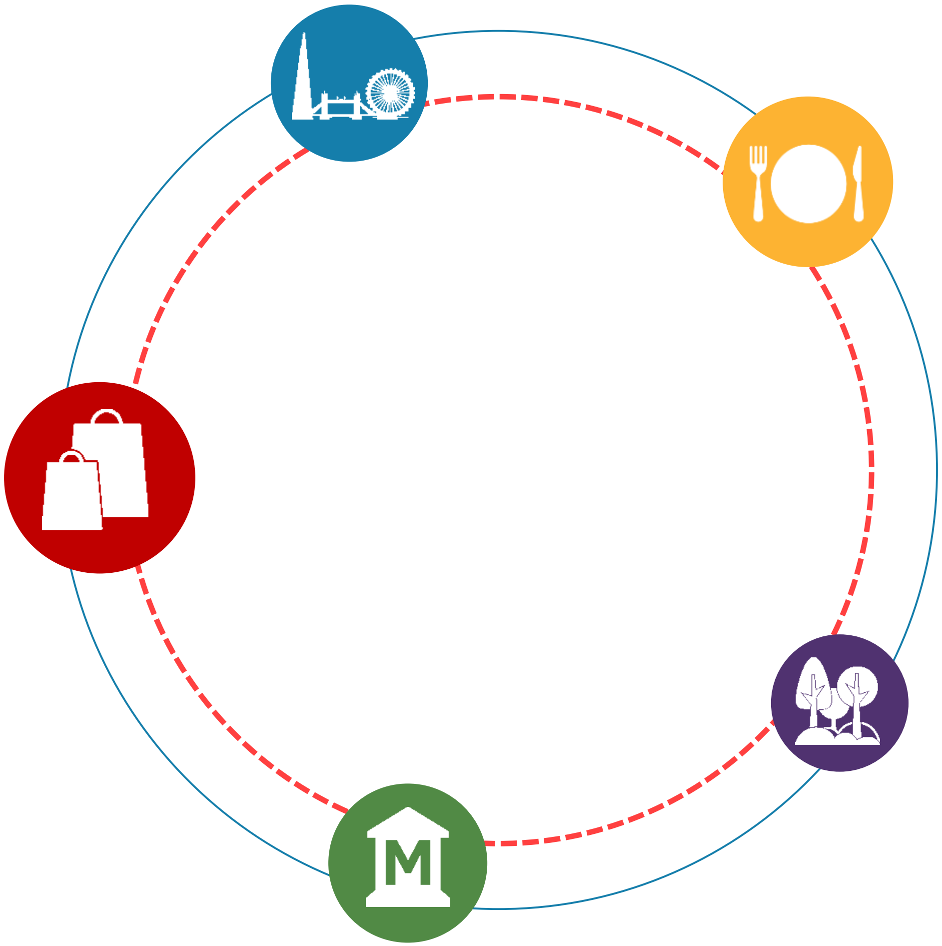


Source: Oxford Economics

1.4 Inbound activities

Inbound Britain activities

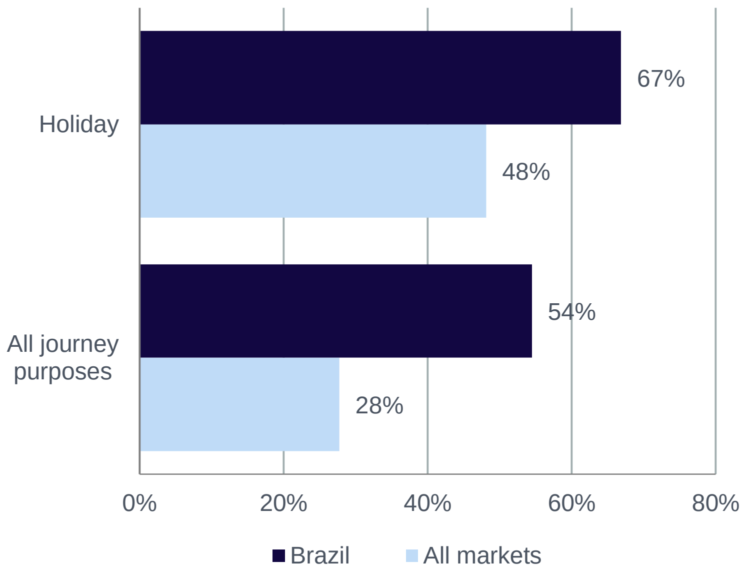
- Shopping, dining in restaurants, and visiting museums or art galleries are the most popular activities for Brazilian visitors while in the UK, with 73%, 72% and 54% doing so; these are all higher than the all-market average.
- Brazilian visitors also have a high and above average propensity to visit parks/gardens (53%), going to a pub (51%), visit castles/historic houses (47%) or religious buildings (45%).
- Brazilian visitors have a high propensity to purchase many items, including clothes, cosmetics or toiletries and bags or purses.
- About 8,000 visits per annum feature time watching football.



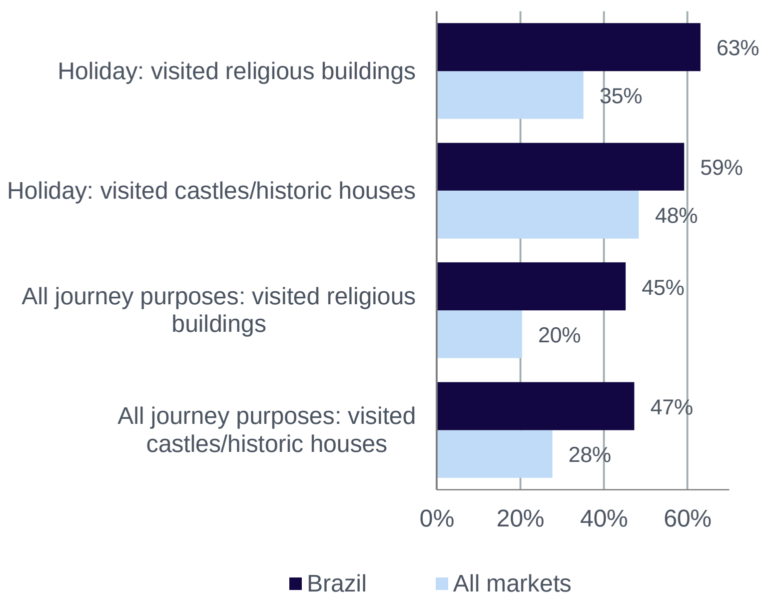
Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity to visit museums and galleries



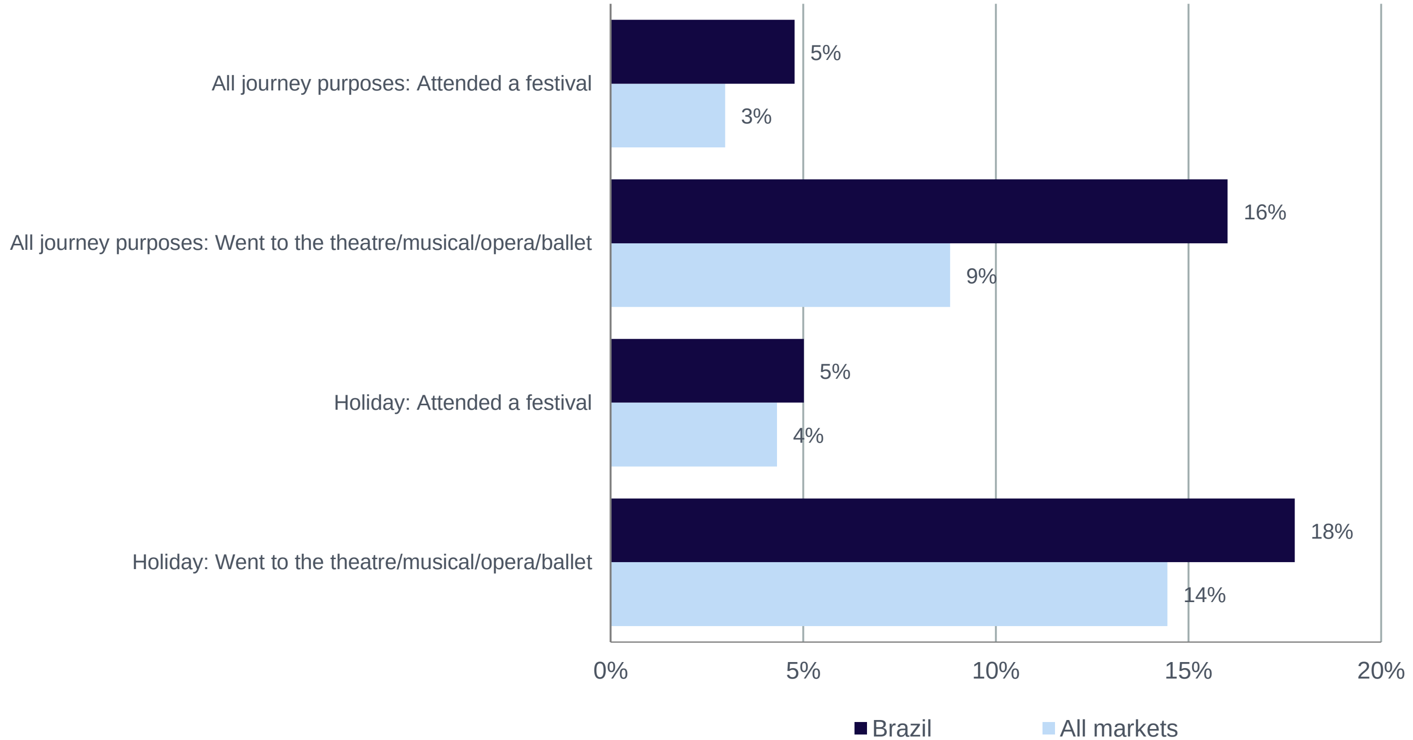
Propensity to visit built heritage sites



Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

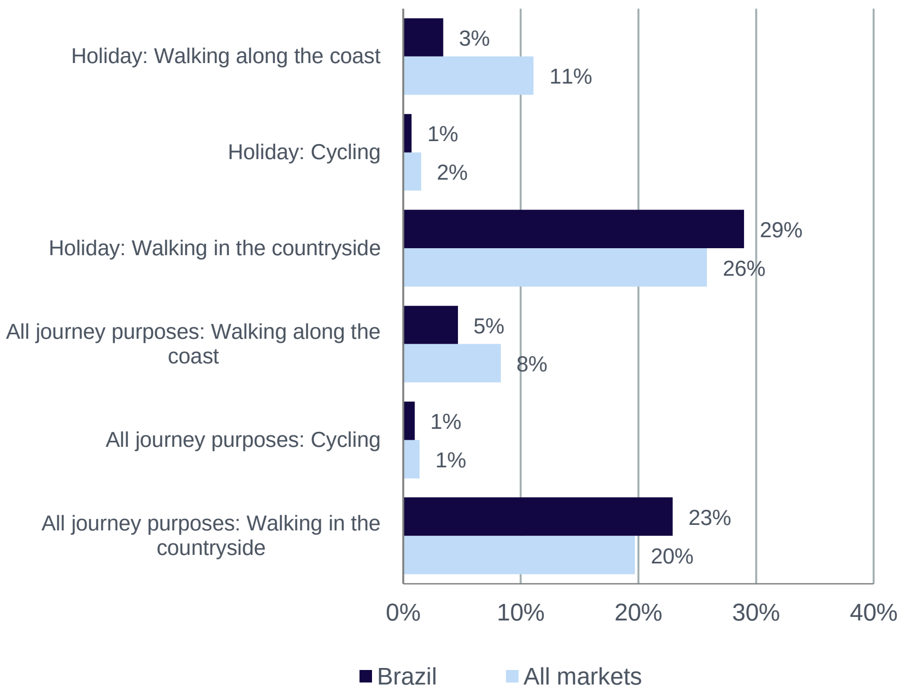
Propensity to attend the performing arts



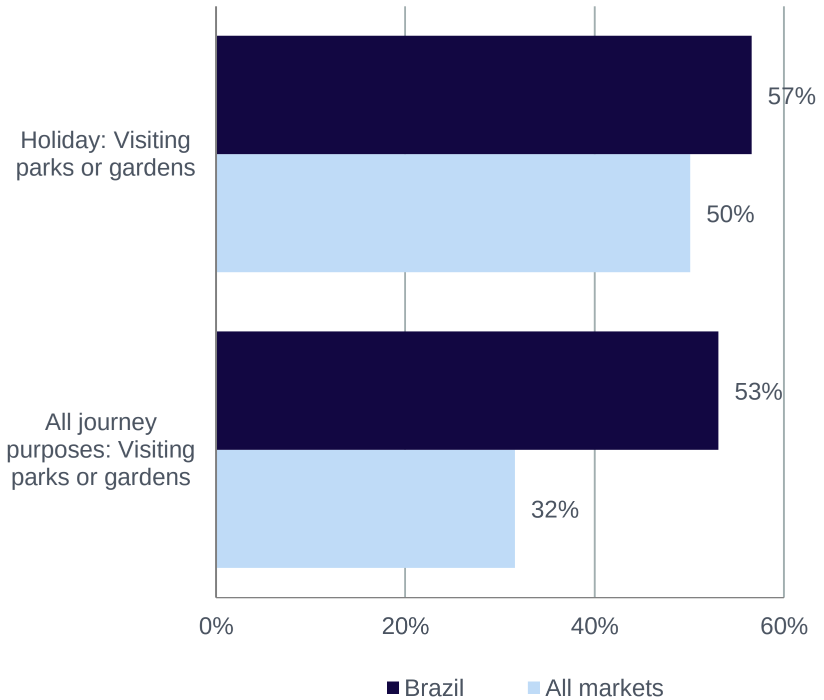
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to go for a walk



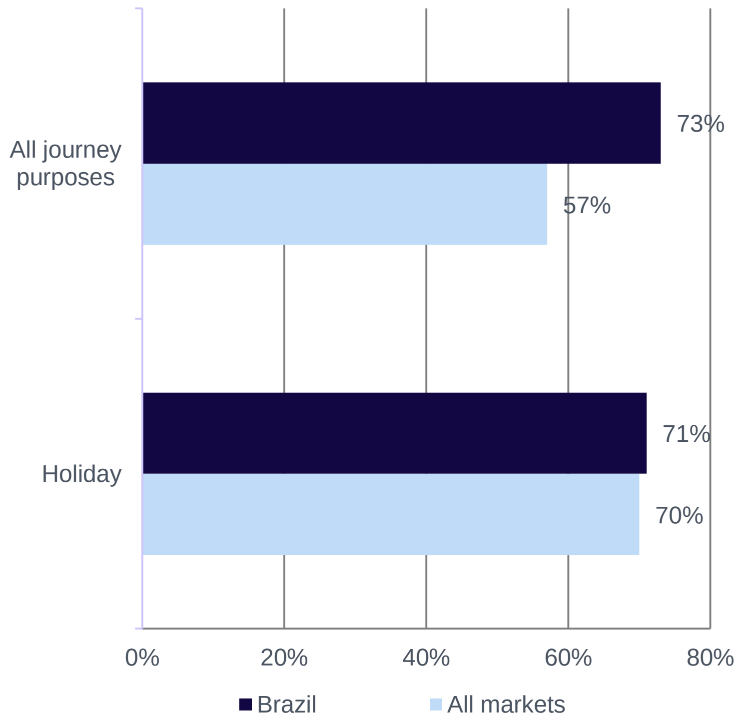
Propensity to visit a park or garden



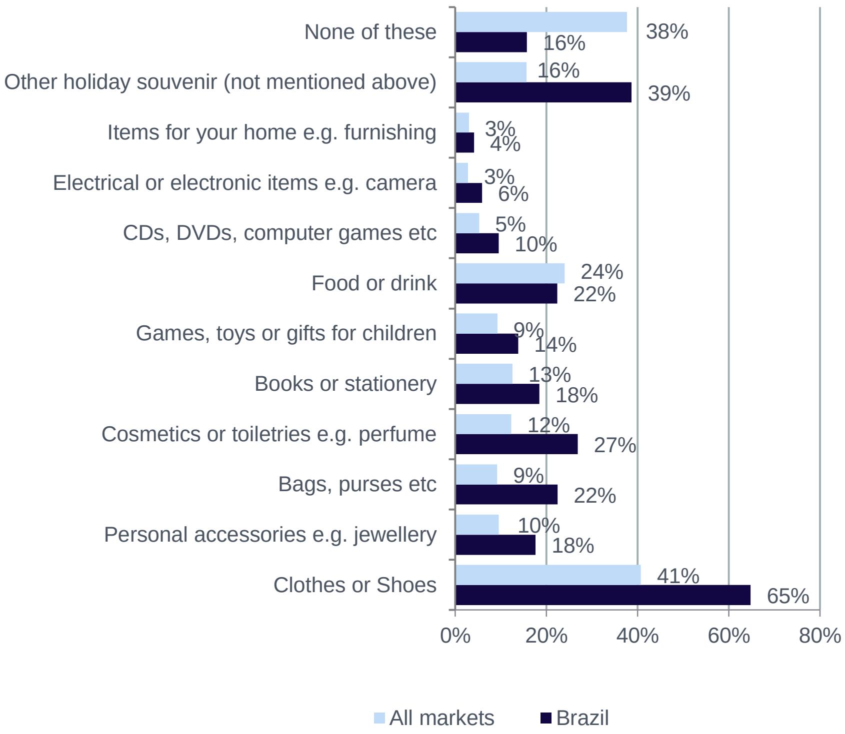
Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go shopping during visits to Great Britain



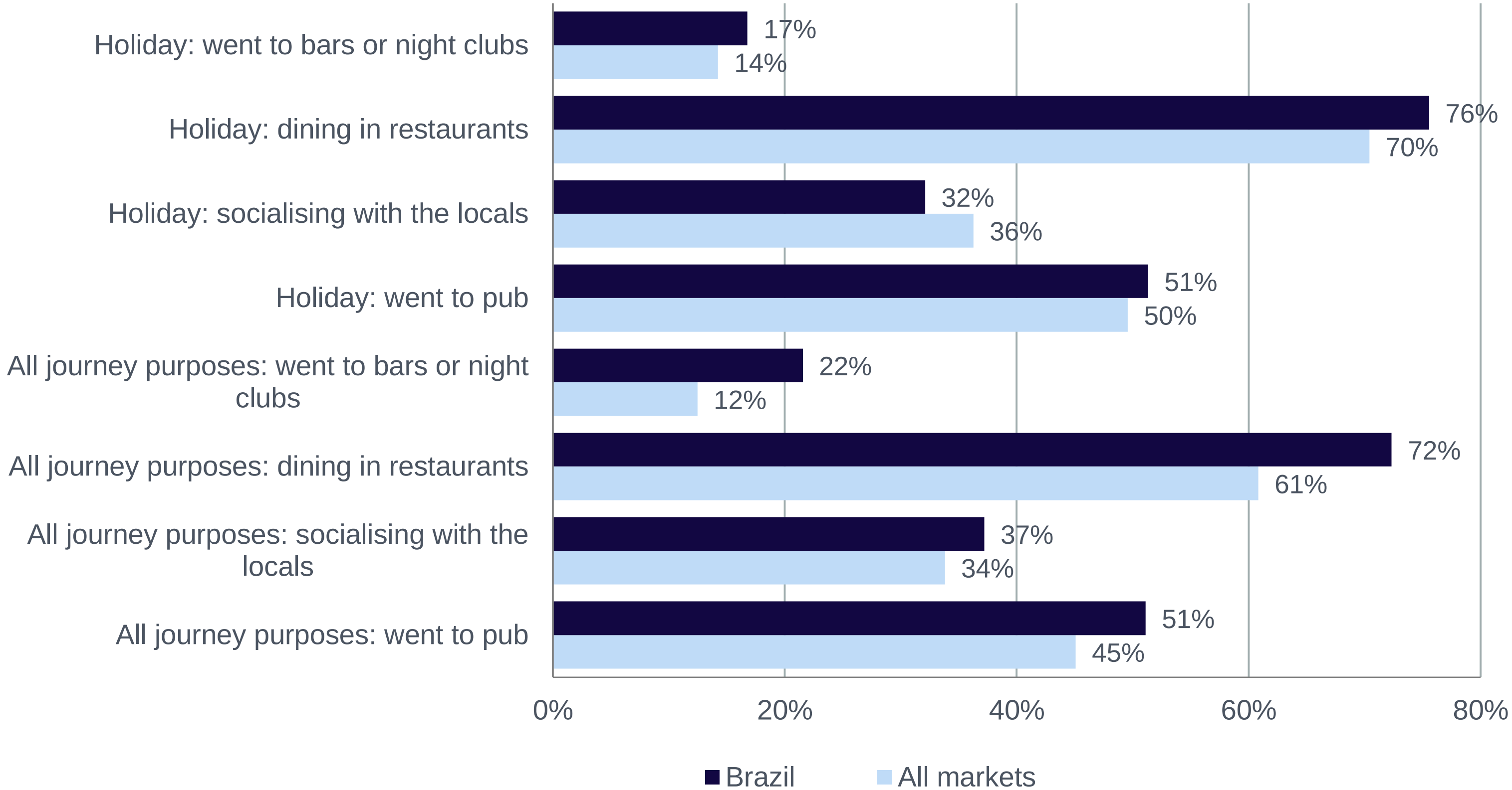
Propensity to purchase selected items



Source: International Passenger Survey by ONS 2011, 2013

1.4 Inbound activities

Propensity to go to restaurants, pubs and socialise with locals



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

Chapter 2:
Understanding the market

2.Understanding the market

Chapter summary

- Brazil's economy emerged in 2017 from its deepest recorded recession. As a result, its outbound travel market is recovering. The number of outbound overnight trips from Brazil is forecast to break the record by 2020.
- Almost 6-in-10 Brazilian holiday visitors start thinking about their trip to Great Britain early, more than half a year in advance. 37% of Brazilian travellers booked their trip to Britain three to six months before arrival.
- Word-of-mouth, websites providing travellers' reviews and information from search engines influence the destination choice of many Brazilians.
- "Cultural attractions", "a wide variety of places to visit" and "a culture that is different from their own" are strong motivators for Brazilian visitors to choose Great Britain as a holiday destination.
- Brazilians are quite positive about Great Britain: the nation is ranked 8th among 50 nations for its overall image, although this compares to an average global ranking in 3rd place.

87%
of Brazilian international travellers used social media during their last holiday abroad

Source: Oxford Economcis, VisitBritain/IPSOS 2016, GfK Anholt Nation Brands Index 2017

2.1 Structural drivers

Demographics & society

- In 2017, is estimated that Brazil has a population of more than 209 million, making it the fifth largest country by population.
- The population in Brazil is relatively young; the share of the population aged 65 years or over was just 9% in 2017 (forecast to rise to 14% by 2030).
- Brazil is a culturally diverse country owing to waves of immigration, both during the three centuries of Portuguese rule and the slave trade from Africa, as well as European arrivals after the World Wars in the 20th Century.
- After a severe recession in 2015 and 2016, the Brazilian economy is recovering and investors' confidence in Brazil is growing. The forecast for economic growth is positive, although fiscal/pension reforms are necessary to drive growth which the Government will be voting on in 2018.

The economy in Brazil is forecast to grow by 2.5% in 2018

Source: Oxford Economics, CIA World Factbook 2017, The Financial Times Limited 2017, The World Bank Group 2017, United Nations Population Division 2017.

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	Estimate
Total population in 2017	209,480,000
Median age	32
Average annual rate of population change in 2015 - 2020	0.8%

Economic indicators (year-on-year growth)

Indicator	2017	2018	2019
Real GDP	1.1%	2.5%	3.3%
Consumer spending	1.0%	2.8%	3.3%
Unemployment rate	12.8%	12.4%	11.1%
Average earnings	6.1%	5.9%	6.1%
Consumer prices	3.5%	4.1%	4.2%

Source: CIA World Factbook 2017, Oxford Economics November 2017

2.1 Structural drivers: general market overview

General market conditions

- Brazil was the UK's 36th largest source market in visitor arrivals and 29th most valuable market for visitor spend in 2016. It is the UK's #1 market for arrivals and spend in Latin America.
- GDP per capita began growing again in 2017 after two years of sustained economic depression in 2015 and 2016. It is forecast to continue its recovery in the years ahead.

Key demographic and economic data

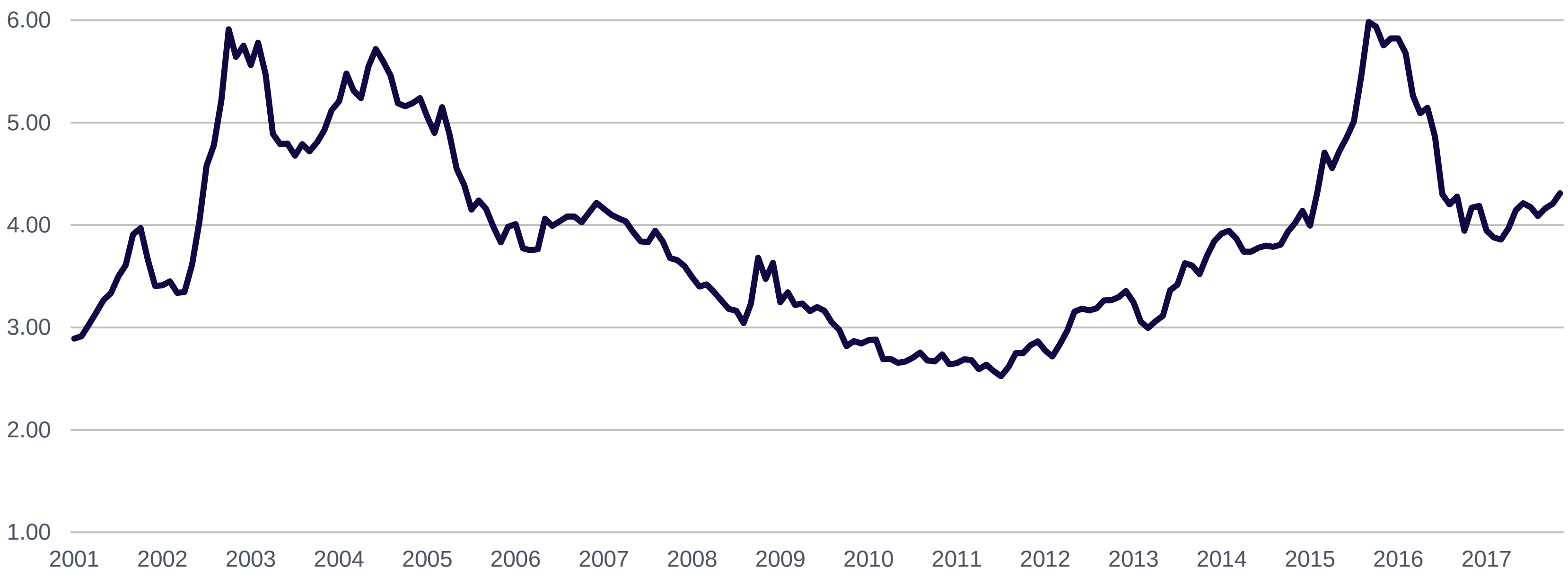
Measure	2017
Population (m)	209.5
GDP per capita PPP (US$)	13,837
Annual average GDP growth over past decade (%)	1.5
Annual GDP growth in 2017 (%)	1.1

Source: Oxford Economics November 2017, CIA World Factbook 2017, Capgemini World Wealth Report 2016, IBGE, ETC, WorldAtlas

- The first nine months of 2017 registered the lowest inflation for nineteen years in Brazil.
- According to Capgemini, Brazil counted 164,000 High Net Worth Individuals (HNWI) in 2016; these are defined as people with investible assets worth more than US$1 million. 87% of these have US$30 million or more in investable assets; the so-called ultra-HNWIs.
- The country has a population of 209+ million with a median age of 32. The majority of Brazilians live along or close to the coast, with many living in urban areas (86%). 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 mostly European ancestry (e.g. Germany, Italy, Poland, Portugal, Spain) paired with many with African descent as well as part of the population with Japanese roots.

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in BRL)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England

2.2 Consumer trends

- Brazil has the largest tourism economy in Latin America. Its outbound overnight travel market is forecasted to grow by 24% between 2016 to 2020.
- An important reason for the growing outbound travel market is the economic recovery in Brazil. The size of the middle classes is rising again; therefore more Brazilians can afford to travel internationally.
- Many Brazilians have European ancestry. Together 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 or relatives. Cultural attractions, shopping, sports events and education are other important motivators for Brazilians to visit Europe.
- Portugal is especially popular among Brazilians as Brazil was once a Portuguese colony. As both countries share the same language, there is no barrier to communication.

42%

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

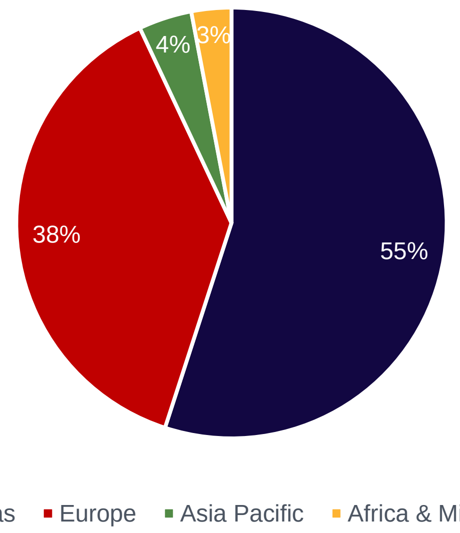
Sources: Oxford Economics, ETC, UNWTO

2.2 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 2016, mostly in the USA and Argentina. Almost four-in-ten overnight visits were spent in Europe in 2016. In order, these were France, Portugal, Italy, Spain, Germany and Great Britain
- Brazil's e-commerce market is growing as an increasing number of Brazilians become comfortable with making online purchases. Most of online purchases are made via desktop or laptop.
- 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 2016



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

2.3 Booking and planning

- A large proportion of Brazilian holiday visitors tend to start thinking about their trip early with 58% doing this as early as half a year or more in advance.
- 37% of travellers booked in the three to six months window before arrival in Great 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 Great Britain book travel and accommodation together (67%), mostly online (61%) or face to face (31%).
- They are more likely than the average visitor to purchase tickets for tourist attractions, sporting events and guided sightseeing tours prior to their trip.

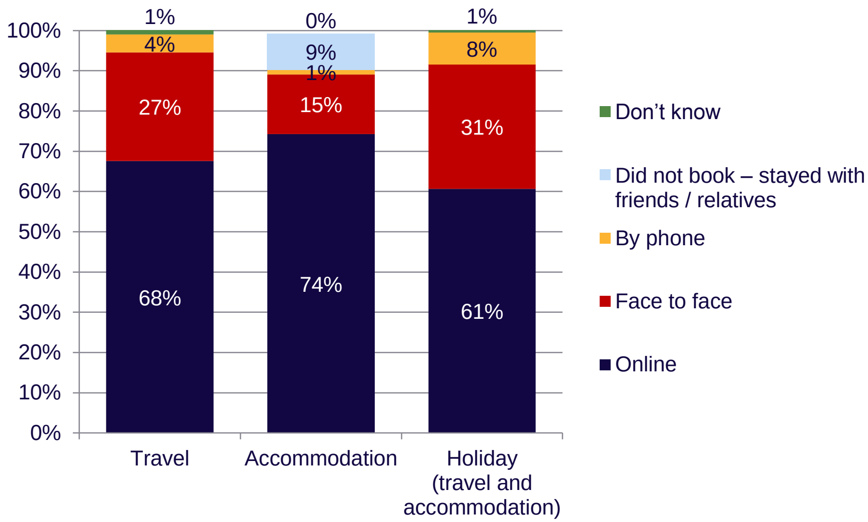
58%

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

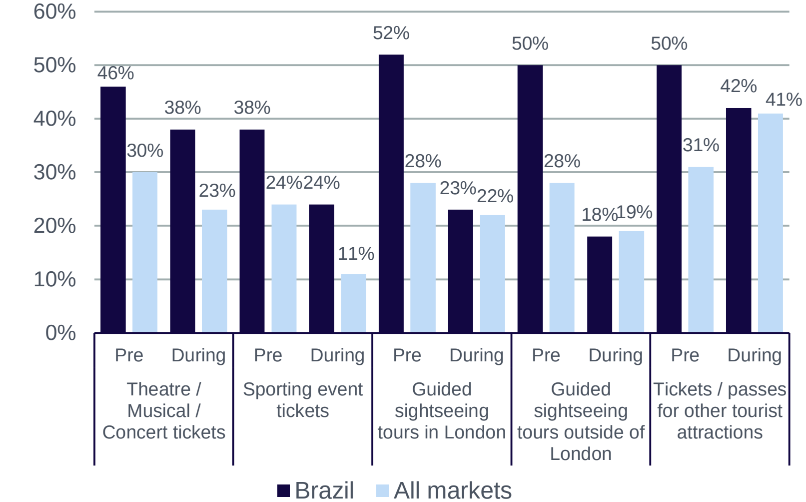
Source: VisitBritain/IPSOS 2016, base: visitors

2.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked



Propensity to make a purchase before or during trip



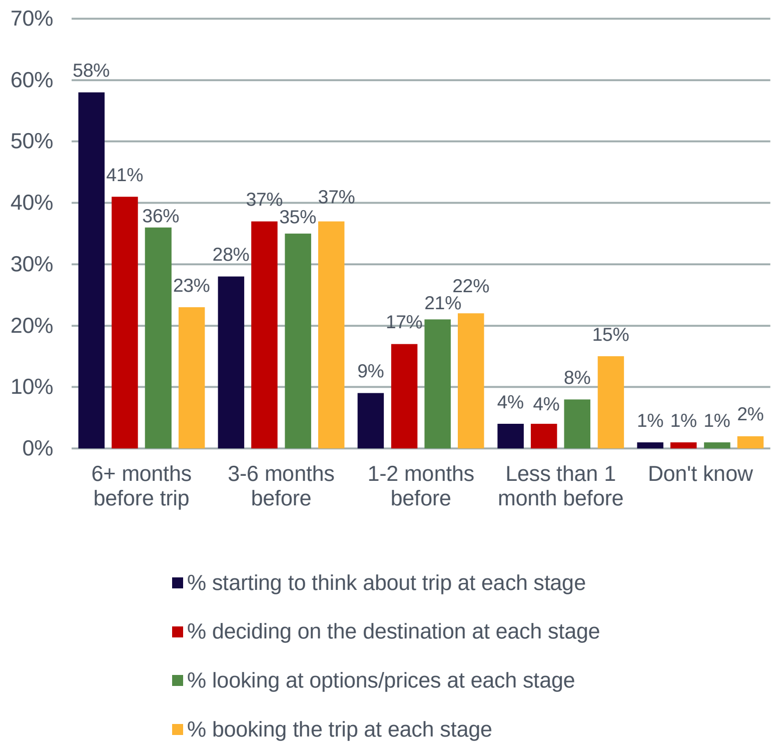
- Most Brazilians book their trip to Great Britain online, especially when reserving their accommodation. The majority of online bookings are made via a laptop/desktop.
- About two thirds of Brazilian visitors to Britain book their travel and accommodation together (67% of visitors), which is above the all-market average of 50%. About three-in-ten bookings were made face-to-face for these holiday packages.

- 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/ concert tickets.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- 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 49% 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 and six months ahead of the trip and an almost equal share booked their trip in that same time frame.
- About two thirds of Brazilian visitors to Britain book their travel and accommodation together, which is higher than the all market average of 50%. 64% of Brazilians that 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.

2.4 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; these travellers are 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 of Brazil. Brazil's most populous cities of São Paulo and Rio de Janeiro can be found in this region.
- TV is the main medium for Brazilians to obtain news and entertainment, however digital media consumption has made strong gains.
- Brazilians are heavy social media users. In terms of daily usage, Facebook is the most used social media platform in Brazil, followed by YouTube. Instagram and Google+ are other frequently used channels.

Facebook
dominates the social media platforms in Brazil in terms of daily usage.

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

2.4 Reaching the consumer

Broadcast media

- TV is the preferred medium for Brazilians to obtain news and entertainment with 77% of the population watching 3 to 4 hours each day. **TV Globo** dominates as the preferred free-to-air channel with **Record**, **SBT** as a distant second and third, followed by **BAND**. News, films, reality programming, variety shows (on weekends) and soap operas (novellas) are the most popular programs.
- Pay TV penetrates 18.8 million affluent households.

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. Print circulations are decreasing (-6% in 2016), while online readership grows.
- Daily newspapers with the highest circulation (print and web - # indicates rank) in 2016 that reach the affluent class A / B segments include **O Globo** (#2), **Folha de São Paulo** (#3), **O Estado de São Paulo** (#4), **Zero Hora** (#6), **Estado de Minas** (#14), **A Tribuna** (#19), **O Tempo** (#20) and **Correio Brazilense** (#21).
- **UOL**, **R7** and **Terra** are popular online news/info sites.

Radio

- 44% of Brazilians listen to the radio daily, with almost half of the audience within the affluent class A / B.
- Music is the most popular radio format, followed by news and traffic information.

Magazines

- Almost one quarter of Brazil's population read magazines regularly, 50% of readers do so weekly.
- Weekly celebrity, news and sport magazines attract the highest number of readers. Within the travel/lifestyle space, circulations are much smaller, but targeted towards affluent Brazilian consumers.
- Key titles include **Viagem E Turismo**, **Viaje Mais, Viajar Pelo Mundo** and **Top Destinos.**

Online media

- About 140 million Brazilians use internet; this equates to 68% of the Brazilian population.
- In 2017, smartphones surpassed computers as the preferred device to access digital content.
- YouTube and Facebook have the highest penetration rate, each at around 65%. Instagram engages 40% and Twitter 36% of the population respectively. WhatsApp is used by 52% of connected Brazilians.

Source: BBandaB, Meio & Mensagem, Inteligencia, Pesquisa Brasileira de Mìdia 2016, Pensario Internacional, Reuters Institute, Statista

2.4 Reaching the consumer: social media on holiday

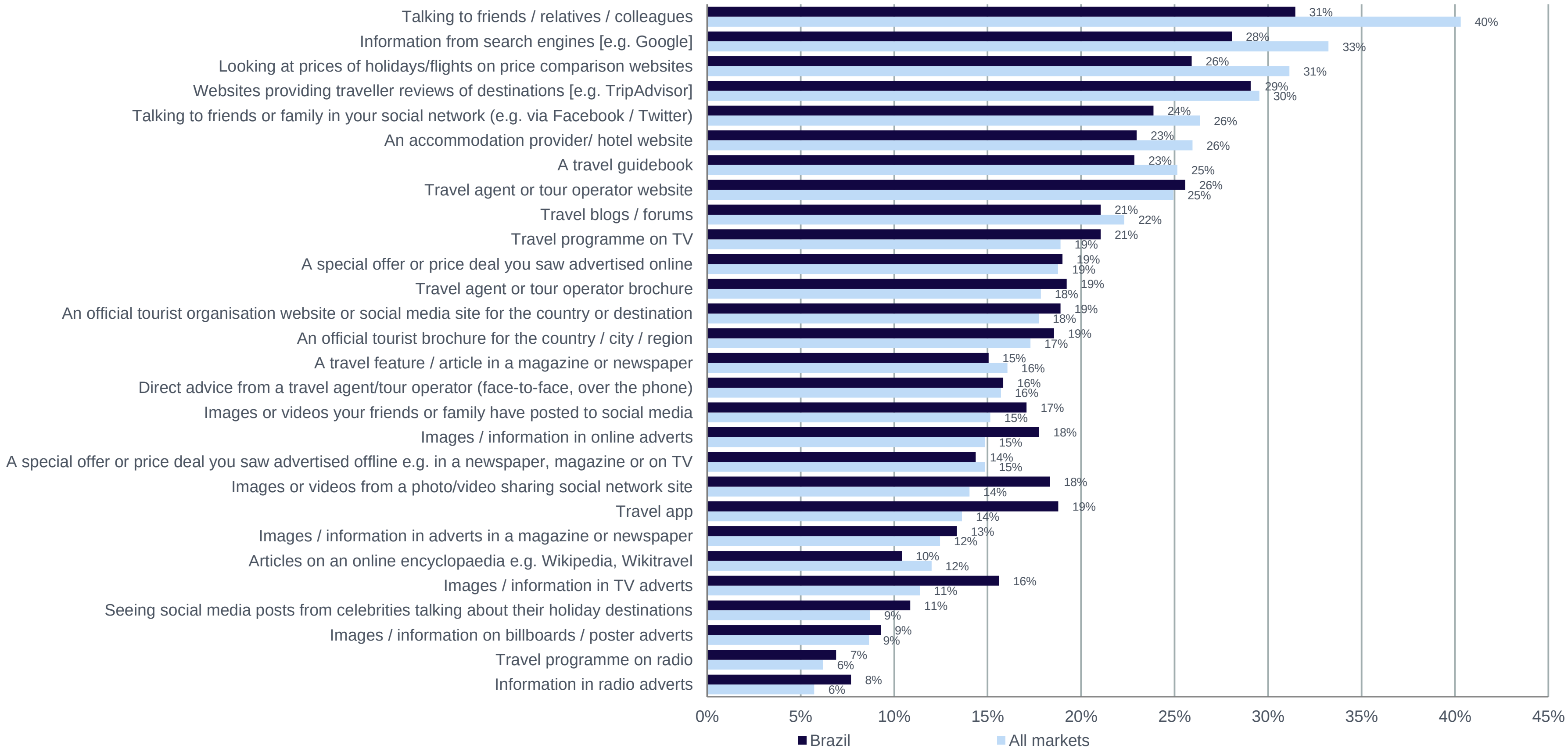
Use of social media on holiday

- 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.
- Facebook dominates the social media platforms in Brazil in terms of daily usage, followed by YouTube, Instagram, and Google+.
- 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)?

2.4 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)

2.5 Perceptions of Britain

- Brazilians rate Great Britain highly for contemporary culture as well as historic buildings and monuments, but less for scenic natural beauty. Britain is rated 8th out of fifty nations for the former two attributes and 24th for the latter.
- Britain is ranked even higher for contemporary culture and historic buildings at the global level. This could be a result of the relatively low knowledge Brazilians have of Great Britain's destination attributes (see VisitBritain's *Britain and Competitors* Foresight report for further analysis).
- Museums and music are the cultural products that are most strongly associated with Great Britain by Brazilians.
- Cultural attractions motivated many Brazilian visitors (36%) to choose Great 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%).*
- 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.

Britain is the
8th strongest nation brand
among 50 nations according to Brazilians

Source: GfK Anholt Nation Brands Index 2017, Arkenford 2013, VisitBritain/IPSOS 2016
** (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)*

2.5 Perceptions of Great Britain

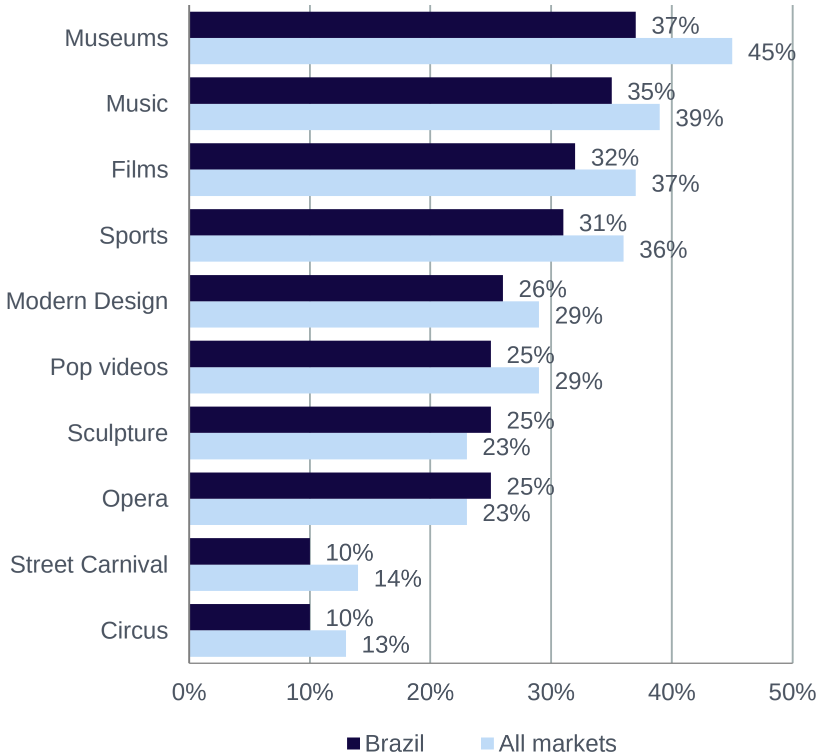
Great Britain's ranking (out of 50 nations)

Measure	Brazilian respondents	All respondents
Overall Nation Brand	**8**	**3**
Culture (overall)	**9**	**5**
The country has a rich cultural heritage	11	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	11	4
People (overall)	**10**	**6**
If I visited the country, the people would make me feel welcome	13	13
Tourism (overall)	**12**	**3**
Would like to visit the country if money was no object	11	6
The country is rich in natural beauty	24	24
The country is rich in historic buildings and monuments	8	5
The country has a vibrant city life and urban attractions	9	4

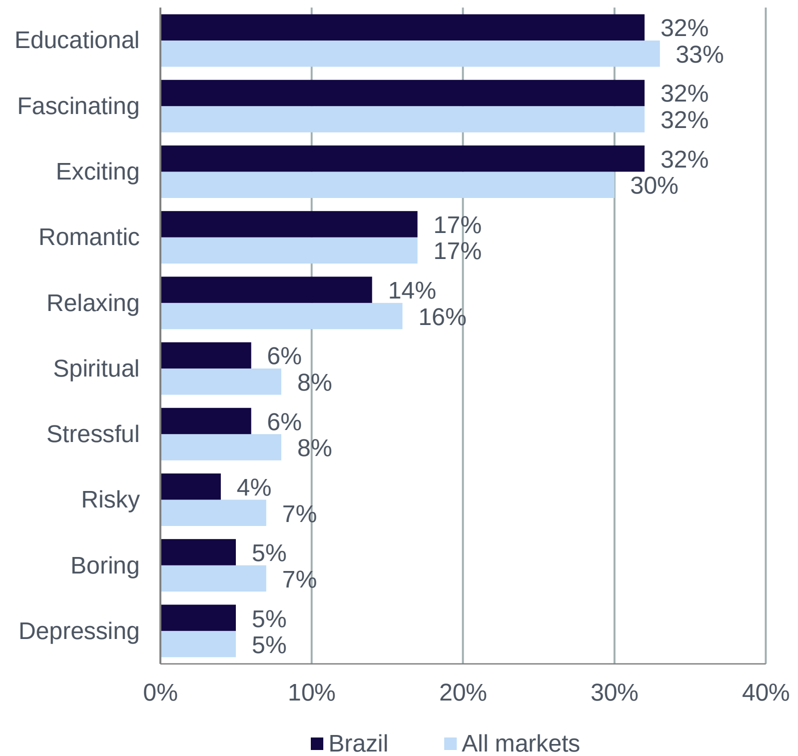
Source: GfK Anholt Nation Brands Index 2017

2.5 Perceptions of Great Britain

Cultural associations



Adjectives describing a potential trip to Great Britain



Source: GfK Anholt Nation Brands Index 2017

2.5 Perceptions of Britain

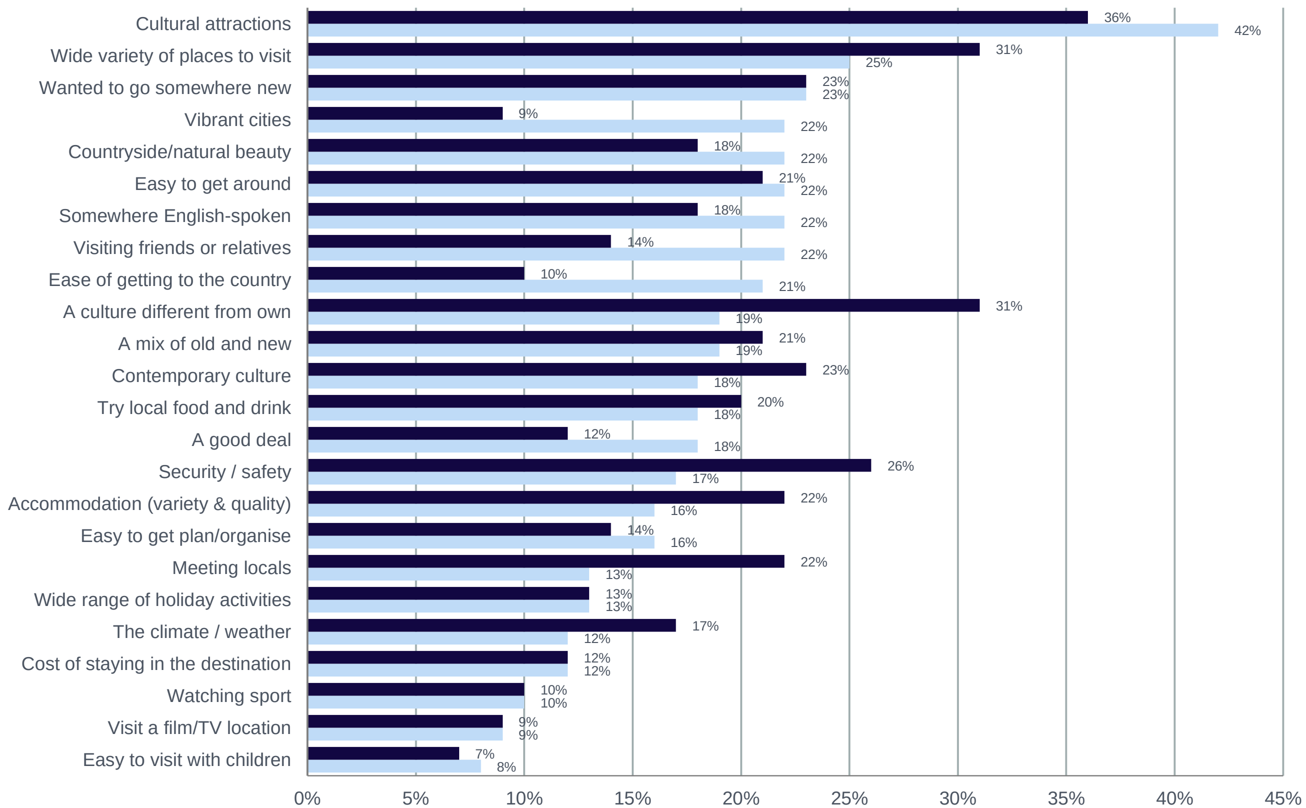
Holiday wants and % saying destination is best place for…

Importance		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%
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%
5.22	Watch a sporting event	33%	35%	41%	26%	55%	31%
5.17	Do something useful like volunteering to help on a project	32%	30%	32%	33%	32%	28%

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

2.5 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)

Chapter 3:

Access and travel trade

3. Access and travel trade

- Brazilians are among the visitors who are most likely to visit the UK as part of a multi-country tour (including an overnight stay in another country either before arriving and/or after leaving the UK). Thus many Brazilians arrive by the Channel Tunnel (24% of visitors in 2016 compared to 12% of all inbound visitors to the UK).
- 74% of Brazilian visits to the UK were made by plane in 2016. The international airports in the cities of São Paulo and Rio de Janeiro are connected to London (Heathrow) via direct non-stopping flights. In 2017 there was an average weekly capacity of 5,500 seats.
- Brazil's travel trade sector consists predominantly of travel agencies that sell packages or bespoke itineraries, paired with many products provided by tour operators.
- Many agencies and tour operators are growing their focus on niche markets, especially in the luxury segment.

42%

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

Source: Apex Rdc 2016, VisitBritain/IPSOS 2016, base: visitors

3.1 Access: key facts

- 24% of Brazilian visitors arrive through the Channel Tunnel as part of a multi-country trip, which is twice as high as the all-market average. 74% arrive by plane.
- After a decrease of two years, airline capacity picked up again at the end of 2017. In November and December 2017, seat capacity increased by 9% compared to the same period in the previous year.
- The international airports in the cities of São Paulo and Rio de Janeiro held 79% and 21% of seat capacity between Brazil and Great Britain in 2017, respectively.
- British Airways (São Paulo and Rio de Janeiro) and LATAM Airlines Brasil (São Paulo), are the airlines serving non-stop Brazil-Great Britain routes, both arriving at London Heathrow.

24% of Brazilian visitors arrive to the UK through the Channel Tunnel.

Access to Britain*

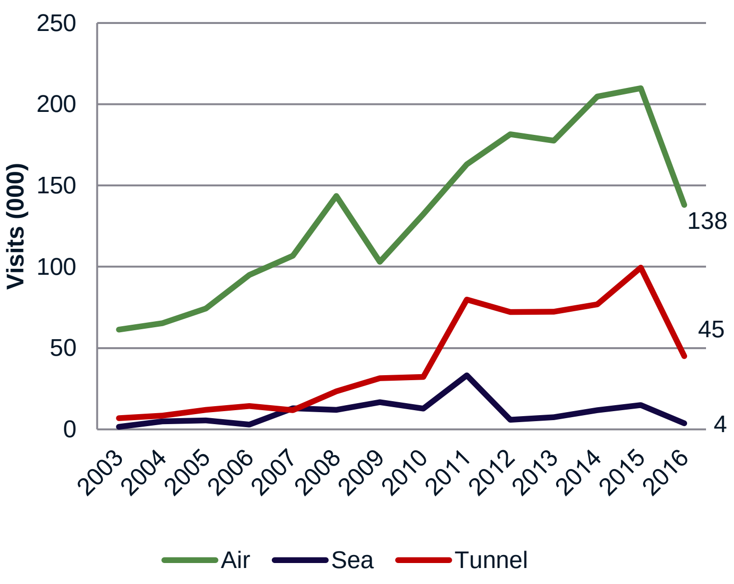
Measure	2017
Weekly aircraft departures	19
Weekly aircraft seat capacity	5,500
Airports with direct routes in Brazil	2
Airports with direct routes in Britain	1

Source: International Passenger Survey by ONS, Apex RdC 2017

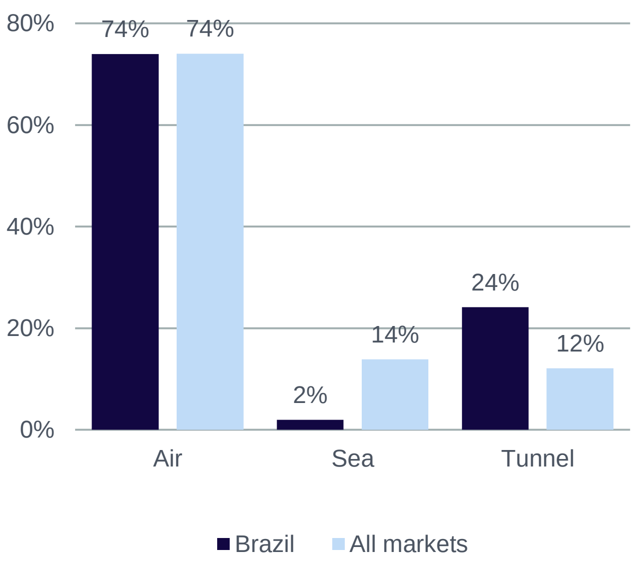
** non-stop flights only*

3.1 Access: mode of transport

Visits by mode of transport



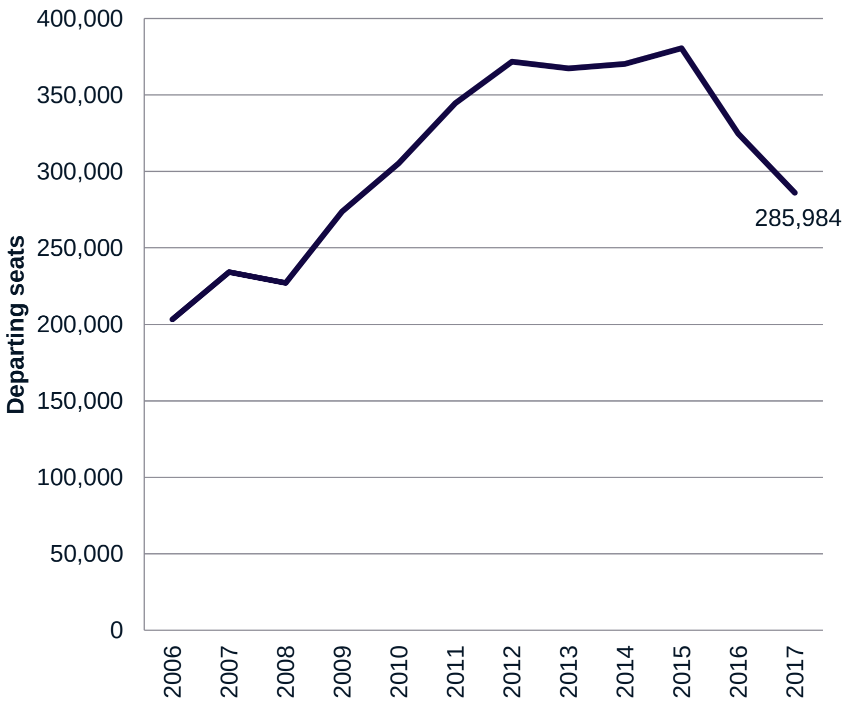
Annual share by mode (2016)



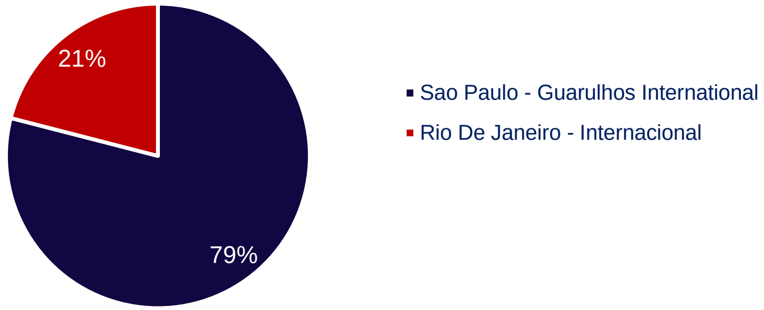
Source: International Passenger Survey by ONS

3.1 Access: capacity

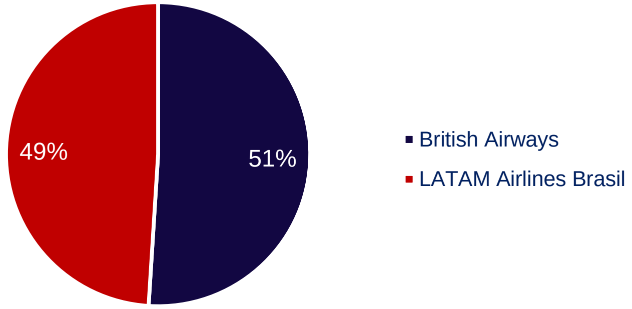
Annual airline seat capacity trends



Origin airport annual seat capacity (2017)



Airline seat capacity by carrier (2017)



Source: Apex Rdc 2017: non-stop flights only

3.2 Travel trade: general overview

- Brazil's travel trade consists predominantly of travel agencies that sell package or bespoke itineraries, as well as products provided by tour operators to the end consumer. Tour operators within the market often specialise in specific areas of the world; such as Europe/USA/Caribbean, or within market areas such as leisure, business/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 consolidation with operators purchasing its competitors, as well as many agencies and operators going out of business.
- Today, significant operators within the Brazil market include: Abreutur, Agaxtur, Alatur, CVC, Flytour Viagens, MMTGapnet, Newit, New Age, Orinter Tour & Travel, Primetour, Queensberry, Teresa Perez, and Trend Operadora.
- 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 personalized service and the ability to curate bespoke travel experiences/itineraries for their clients.

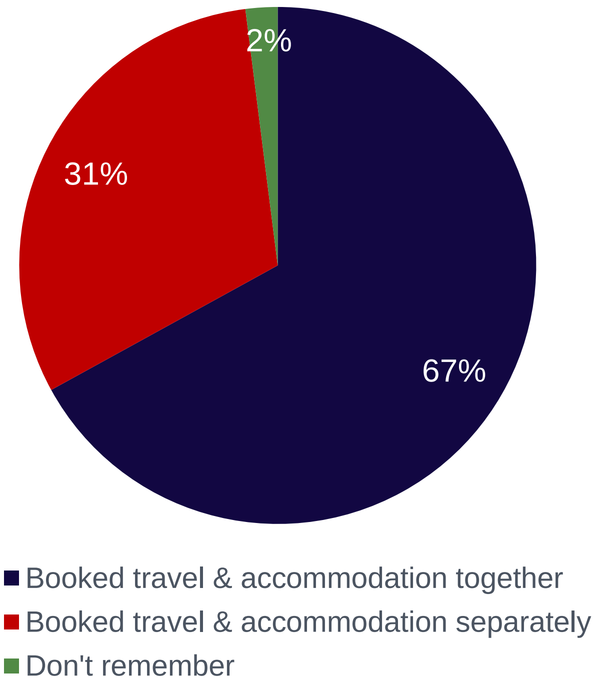
3.2 Travel trade: general overview

Trade Exhibitions

- Brazil has two large annual trade shows in São Paulo (WTM Latin America – early April, ABAV late September), paired with regional trade shows (such as Festuris each November in southern Brazil). Some operators are organising their own events, such as Hiperfeirão Flytour, as well as regional events by the national tour operator association BRAZTOA.
- ILTM Latin America each late April/early May (previously Travelweek São Paulo by ILTM) 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.

Travel and accommodation booking

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



Source graph on the right: VisitBritain/IPSOS 2016

3.2 Travel trade: Brazilian holiday calendar

National public holidays

2018	2019	National public holidays
1 January	1 January	New Year’s Day
12 – 13 February	4 – 5 March	Carnaval
30 March	19 April	Good Friday
21 April	21 April	Tiradentes Day
1 May	May 1	Labor Day / May Day
30 May	20 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/

3.2 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. Rio de Janeiro is a secondary hub for travel trade. Other cities of importance include Brasilia, Belo Horizonte, Curitiba, Porto Alegre and other cities in São Paulo state such as Campinas and Riberão Pretro.

Time difference

- Outside of daylight savings time, late February to late October, Brazil is four hours behind Greenwich Mean Time (GMT).
- During daylight savings time, early November through mid February, the south, southeast and central eastern parts of the country are two hours behind GMT. Many of Brazil's north and northeast states (Bahia, Ceará, Pernambucu) do not adopt daylight savings time and are three hours behind GMT during this period.
- The transitions between standard time and daylight savings time are on different dates within Great Britain and Brazil. Owing to this, there can be a few weeks when the time difference can be three hours between Brazil and Great Britain in late October/early November and mid/late February each year.

Weather

- Weather varies across Brazil owing to its immense size. Located in the Southern Hemisphere, its seasons are the opposite to Great Britain's.
- 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 low 30°Cs in the summer.

Transport

- In São Paulo's city centre or along Avenida Paulista, use the subway for short journeys.
- 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 by hotels, from the street or picked up at stands (pontos) across each city.
- Traffic is a major issue in most Brazilian cities. Always leave plenty of time for travel between meetings.

3.2 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 time of year.
- 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 personal relationships in doing business. 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.

3.3 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.

Language basics

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

3.3 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 the Great Britain.
- Lunch is usually a more substantial meal, eaten around 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 is also starting to gain 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.
- 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.
- 29% of Brazilians that consider visiting Great 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

3.3 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)
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!

3.4 Working with VisitBritain

We can help you extend your reach in Brazil through:

- Digital and social media such as through our Facebook page – lovegreatbritain.br; Earned media opportunities (Public Relations) by sending us your newsworthy developments or hosting our journalists and broadcast crews
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the online VisitBritain shop
- 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 (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

Or press & PR team

(Email: pressandpr@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-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 (visitbritain.org/markets-segments)

or our inbound research & insights (visitbritain.org/inbound-research-insights)

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

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making, booking cycle of international leisure visitors to Britain https://www.visitbritain.org/understanding-international-visitors
- Technology and social media https://www.visitbritain.org/understanding-international-visitors
- Multi country trips
- https://www.visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

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Market and Trade Profile: Brazil

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