

# **Brazil - Travel & Tourism: Inbound tourism to drive the industry (Strategy, Performance and Risk Analysis)**

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## **Abstracts**

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### **SUMMARY**

Brazil is rich in natural heritage and vast biodiversity. However, the country's tourist potential is affected by weaknesses in societal safety, infrastructure, and labor, among other factors. Though fluctuations in its local currency negatively affected outbound tourism, it led to growth in inbound tourism, which contributes significantly to the total travel and tourism of the country.

The country's inbound tourism expenditure increased at a CAGR of 1.8%, from US\$6,858.4 million in 2012 to US\$7,357.8 million in 2016, and is expected to rise at a CAGR of 2.2%, from US\$8,132.4 million in 2017 to US\$8,886.6 million in 2021. Growth in tourist numbers was driven by the 2016 Rio Olympics, along with the depreciation of the local currency (Brazilian Real).

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

### **KEY HIGHLIGHTS**

Growing investments in the hotel industry to drive hotel revenue over the forecast period (2017-2021)

The total revenue from hotels declined at a CAGR of -11.8% over 2012-2016, from US\$18.6 billion in 2012 to US\$11.2 billion in 2016. The decline is attributed to the depreciation of the Brazilian Real, which affected the hotel industry's profit margins. However, it is forecast to increase at a CAGR of 2.1%, from US\$12.1 billion in 2017 to US\$13.1 billion in 2021 due to increase investments in the industry.

#### Increasing demand to foster revenue growth

Full service airlines accounted for the majority of revenue and will be the main revenue generator during the forecast period. Though revenue in this segment declined at a CAGR of -8.2% over the review period, from US\$8,611.8 million in 2012 to US\$6,125.2 million in 2016, it is forecast to increase at a CAGR of 6.2%, from US\$6,858.5 million in 2017 to US\$8,716.7 million in 2021.

#### The car rental fleet size is expected to witness strong growth

The overall car rental fleet size increased at a CAGR of 5.1%, from 198,875 in 2012 to 242,246 in 2016, and is forecast to increase at a CAGR of 2.9%, from 250,612 in 2017 to 281,380 in 2021. This is mainly due to international sports events such as the 2014 FIFA World Cup and 2016 Olympic Games, which increased the volumes of both leisure and business tourists.

## SCOPE

**Risk & Reward Index** - The Risk & Reward index compares the position of the Brazilian travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments and the trends driving market performance in the Brazilian travel and tourism market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Brazilian travel and tourism market.

**Industry Benchmarking** - Benchmark how the Brazilian travel and tourism market is performing compared to regional and global markets in terms of car rental

fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries, and tourism expenditure growth.

Competitive Landscape - Overview of relevant players in the Brazilian travel and tourism industry such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Brazil travel and tourism industry compared to other countries in the South and Central America?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Brazil travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Brazil travel and tourism industry?

What are the Brazil travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Brazil travel and tourism industry?

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