



# MARKET INSIGHTS

## EUROPEAN TRAVEL COMMISSION

MARKET INTELLIGENCE GROUP

## BRAZIL

September 2006

This Market Insight is one of an ongoing series of market profiles produced by the Market Intelligence Group [MIG] of the European Travel Commission [ETC]. New market profiles will be added to the series and updated at regular intervals.

The members of the MIG comprise the Research Directors of the 34 National Tourist Offices (NTOs) who are members of ETC. The group regularly commissions and publishes market intelligence studies, handbooks on methodologies and best practice, and facilitates the exchange of European tourism statistics on the 'TourMIS' web platform.

More information on ETC's programme of market intelligence activities - including links to studies and sources of European tourism statistics - can be found on the organisation's corporate website: <http://www.etc-corporate.org>.

## OVERVIEW

- Brazil generated 3.6 mn outbound trips, involving spending of US\$2.9 bn, in 2004. Preliminary estimates point to a growth of 39% in 2005 to around 5 mn trips and a spend of US\$4.7 bn (+64%).
- In the past, Brazil has normally ranked second to Argentina as the leading outbound tourism market in South America, in spite of its much larger population. However, since 2001 it has generally ranked first in terms of spending, and in 2004 it also overtook Argentina in terms of trip volume.
- Like Argentina, Brazil is regarded as a high-risk travel market, susceptible to boom-bust cycles. It is currently in a boom phase.
- Europe captures almost one third of Brazilian outbound trips, although the top European destination, France, lags some way behind the overall leaders, the USA, Argentina and Uruguay.
- The Real appreciated strongly against both the US dollar and the euro in 2004-05 (and has continued to do so in the first half of 2006), greatly encouraging long-haul travel.
- Airline capacity between South America and Europe has been tight in recent years, and has become tighter in 2006 due to the precarious state of Brazil's national flag carrier, Varig, which has been operating in bankruptcy for over a year.

## COUNTRY PROFILE

### Currency

- Real (R)                      €1 = R3.05 (2005)
- The renewed international confidence in Brazil and the dramatic increases in exports and international commodity prices has sent the Real soaring against the US dollar in 2005-06 – from an average of US\$1 = R2.93 in 2004 to R2.44 in 2005, and to R2.19 by the end of July 2006.
- The Real has also risen strongly against the euro since 2002, trading at an average of €1 = R2.36 in 2004 and R1.96 in 2005 (compared with R3.10 in 2002). By the end of July 2006 it was up to €1 = R1.71.

### Population

- 186.4 mn (2005), growing by 1.3% a year.
- In this vast country, the individual states are to varying degrees isolated from one another and tend to be dominated by their state capitals. The most important cities are São Paulo (pop. 19 mn), Rio de Janeiro (11 mn) and Brasília (3 mn). Other important state capitals include Belém, Belo Horizonte, Curitiba, Manaus, Porto Alegre, Recife and Salvador.
- Even by Latin American standards, Brazil has a notoriously unequal distribution of income. The great majority of the population cannot think of travelling overseas. However, there is a substantial, and very affluent, upper middle class, a proportion of whom do travel as a matter of course. About 14 mn Brazilians have passports.
- Over 80% of the entire population are literate and about 80% live in urban centres, particularly in the coastal regions and large cities.
- The fertility rate (the average number of children per female) is estimated at 2.4. The birth rate has declined substantially since the 1970s, when the population was growing by about 3% a year.

### Age

Breakdown (%)	2005	2020 <sup>f</sup>
0-4 years	9.7	7.7
5-14	18.2	16.1
15-24	19.0	15.9
25-34	16.4	15.1
35-44	13.9	14.9
45-54	10.4	11.8
55-64	6.4	9.4
65-74	3.8	5.6
75-84	1.8	2.6
85+	0.5	0.9

In simpler terms, the age distribution of the population in 2005 is close to the world average: 0-14 years: 28%; 15-59 years: 63%; over 60: 9%. The median age is 26.8 years.

According to the UN, the numbers of children and young people (aged 0-24) will remain roughly stable from 2005 to 2020, while the numbers of those aged 25-54 will increase by a fifth and those over 55 will increase by three quarters.

### Ancestry

Brazil is a multi-ethnic society, with 55% of the population of European origin, 39% mixed race, 5% African and 0.5% Japanese. Among those of European descent, there are in particular large numbers from Portugal, Italy (especially in São Paulo), Germany (especially in the far South) and Eastern Europe.

## Language and Religion

- The national language is Portuguese. As second, third or fourth generation immigrants, many people are bilingual, and many also speak English, French, Italian and/or Spanish reasonably well.
- Most Brazilians are Christians, with 89% Catholic and 6% Protestant.

## Economic Data

	2001	2002	2003	2004	2005 <sup>e</sup>
GDP (US\$ bn)	1,199	1,346	1,556	1,767	1,938
Real GDP growth (%)	1.3	1.9	0.5	4.9	2.3
GDP per capita (US\$)	2,880	2,580	2,790	3,280	4,270
Inflation (%)	6.8	8.5	14.7	6.6	6.9
Unemployment (%)	4.7	5.8	6.0	5.5	5.1

## Brazil's Economy 2004-05

- Brazil is by far the largest economy in South America.
- Real GDP is expected to grow by about 3.5% in 2006.
- Inflation – the national curse – has been curbed in recent years, but interest rates remain very high. Consumer credit is extremely expensive.
- Analysts tend to rate Brazil's long-term economic prospects very highly [see, for instance, Goldman Sach's influential 2003 'BRICs' prognosis for Brazil, Russia, India and China]. However, its recent performance has been disappointing in the context of the surging economic growth among third-world commodities producers. Estimates of Brazil's real GDP growth in 2005 have been revised down from 3.3% to 2.3%.
- This sluggish economic performance appears to be at variance with the surge in outbound travel [see 'Brazilian outbound trips' below]. The explanation lies in the fact that outbound travel has only recently begun to recover from its collapse after the economic crisis and major devaluation of January 1999, which undermined confidence and drastically reduced the dollar purchasing power of the Real.

## TRAVEL PROFILE

### Brazilian Outbound Trips

	2000	2001	2002	2003	2004	2005 <sup>e</sup>
Total ('000)	3,228	2,674	2,364	2,950	3,595	5,000
% annual change	12.7	-17.2	-11.6	24.8	21.9	39.0

Final data for 2005 is not yet available, but preliminary estimates point to a 39% growth in outbound trip volume. This means that 2005 was a record year, surpassing the market's previous high of 4.2 mn achieved in 1998.

The trend data can only be understood by going back to the economic crisis and major devaluation of January 1999, which undermined confidence and drastically reduced the dollar purchasing power of the Real. Total outbound trips fell from 4.2 mn in 1998 to 2.9 mn in 1999. They bounced back briefly and prematurely in 2000, but fell back again in both 2001 and 2002 because of the fears aroused by the Argentine economic collapse and the continued erosion in the value of the Real. It was only in 2003-04 that confidence and, equally importantly, the beginnings of a recovery in the value of the Real returned. Total outbound trips, at 3.6 mn, were still well short of their 1998 peak in 2004.

In 2003 the upturn in outbound travel was largely confined to short-haul destinations (the collapse in the Argentine and Uruguayan currencies, for instance, had made travel to those countries very much less expensive). Among the principal long-haul destinations [see below] there were few signs of recovery until 2004.

Official data provides no reliable breakdown of outbound trip volume by destination, but Europe attracts an estimated 31% share, according to IPK International's Brazil Travel Monitor. This puts the total volume of trips to Europe (as distinct from cumulative arrivals in different European destinations) at close to 850,000.

Anecdotal evidence suggests that demand for outbound travel has continued to rise in 2006, albeit at a lower rate than in 2005.

## International Travel Expenditure (excl transport)

	2000	2001	2002	2003	2004	2005 <sup>e</sup>
Total (US\$ mn)	3,894	3,199	2,396	2,261	2,871	4,720
% annual change	26.2	-17.8	-25.1	-5.6	27.0	64.4
Spend per trip (US\$)	1,206	1,196	1,014	766	799	945

In terms of total outbound travel expenditure, Brazil ousted Argentina from first place in the South American ranking in 2001 (although Argentina has been staging its own recovery in outbound travel, and briefly resumed first place, by a small margin, in 2004). In dollar terms, Brazilian spending rose by a further 44% in Q1 2006.

## Leading Destinations in Europe

### Arrivals ex-Brazil ('000)

	2000	2001	2002	2003	2004
USA	737	551	405	348	385
Argentina	451	333	345	350	362
Uruguay	141	122	118	151	188
Spain	203	165	146	97	184
Italy	146	111	114	86	129
Portugal	146	140	112	118	123
Chile	73	72	79	100	119
Germany	93	87	72	70	83
UK	98	69	83	70	78
Canada	51	37	36	31	50
Paraguay	73	60	43	41	49

These figures represent arrivals as reported by the destinations ('tourists at frontiers', except for the UK, which counts 'visitors at frontiers' and Germany's 'tourists at all accommodation establishments'). They probably represent the top 12 destinations, with the exception of France, nominally in fourth position (but France does not measure Brazilian arrivals).

IPK International suggests that Brazilians made 684,000 trips to Europe in 2003. Of these, France attracted a 37% share (253,000), Italy 25% (168,000), Spain 22% (153,000) and Germany 19% (130,000).

Among the European destinations not listed in the above table, arrivals are roughly on the following scale:

30,000-40,000	Switzerland
10,000-20,000	Austria, Belgium, Netherlands
5,000-10,000	Denmark, Finland, Ireland, Luxembourg, Sweden, Turkey
Below 5,000	Armenia, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Greece, Hungary, Iceland, Malta, Monaco, Norway, Poland, Slovakia, Slovenia

## Nature of Trip

- Average length of a trip to Europe is 15 days, according to ETC's Latin America Operations Group. This correlates with IPK International's 15.6 nights for European trips overall (2001 data) – 18.7 nights for holidays, 13.3 nights for business trips, 11.8 nights for trips to conferences and 22.1 nights for VFR trips.
- The relatively affluent Brazilians who travel independently to Europe for leisure (as opposed to VFR, business and study) – whether repeat visitors or first time visitors – are said to spend freely on accommodation, shopping, transport and leisure activities.

## Purpose of Trip

- IPK International reported the purpose of Brazilian trips to Europe in 2003 as follows: holidays 54%, business and MICE 24%, VFR/other 22%.
- Data for two European countries shows that the pattern of visits does vary from one destination to another. For the UK, the average share in 2000-04 was 44% for holidays, 17% for VFR, 24% for business, 10% for study and 6% for others. For Germany, business trips accounted for a 56% share of Brazilian arrivals. Portugal, Spain and Germany attract a higher than average share of VFR travellers.

## Seasonality

### Breakdown of airline tickets to Europe issued and paid for in Brazil by month, 2000-04:

(% averages adjusted for anomalous outcome for March 2004)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
5.9	6.4	6.3	9.1	11.1	10.5	9.6	9.4	9.3	8.2	7.2	6.9

The winter season in Brazil, from April through September, attracts most Brazilian leisure travel to Europe, peaking in July, although the peaks and troughs have flattened somewhat in recent years.

Brazilians tend to take extended holidays within Brazil in December-February (ending with Carnival), and those rich enough to travel abroad would take further holidays in the middle of the year. Brazilians tend to take a dim view of northern European winters, unless they are winter sports enthusiasts. However, many are also keen to avoid the July-September peak season.

Brazilians have 34 days holiday a year.

### Public holidays, 2006-07

**2006:** 1 Jan, 25-28 Feb (Carnival), 1 Mar, 14 Apr, 16 Apr, 21 Apr, 1 May, 18 Jun, 7 Sep, 1-2 Nov, 15 Nov, 8 Dec, 24-25 Dec, 31 Dec

**2007:** 1 Jan, 16-20 Feb (Carnival), 21 Feb, 6 Apr, 8 Apr, 21 Apr, 1 May, 10 Jun, 7 Sep, 1-2 Nov, 15 Nov, 8 Dec, 24-25 Dec, 31 Dec

## Accommodation

- VisitBritain reports the following breakdown for nights spent by visitors from Brazil in 2004: 14% hotel/guest house, 16% 'Bed & Breakfast', 5% hostel/university/school, 16% rented house, 7% paying guest with family or friend, 38% free guest with family or friend, 1% own home, 4% other.

## Leisure / Recreational Activities

- Brazilians like to think of themselves as tolerant, friendly and fun-loving, strongly attracted to city lights. Many are enthusiastic shoppers and window-shoppers. IPK pointed out in 2000 that the four cities most visited by Brazilians, Miami (34%), New York City (31%), Orlando (23%) and Los Angeles (11%) are "tourism poles whose major attractions are shopping, business and entertainment (Walt Disney and casinos)".
- Nevertheless, coming from the wealthier and best-educated social classes, Brazilian long-haul travellers have a great variety of interests and enthusiasms, including action/adventure sports, arts, culture and heritage, nature and travel for the sake of exploration. There is a strong interest in 'folklore' (meaning, roughly, music, dance and artefacts).
- Their interest in sport is not confined to soccer. There are substantial followings for many international sports, including tennis, basketball and Formula 1 motor racing, but few travel for participation in summer sports (which are keenly pursued at home). For winter sports, Chile and Argentina provide alternatives to Europe and North America.
- Few Brazilians travel abroad for sun & beach: there is plenty at home.

- According to Wave 3 - 2005 of the Anholt-GMI Nation Brands Index, the top ten aspirational destinations for Brazilians are:
  - 1 Italy
  - 2 France
  - 3 Spain
  - 4 Australia
  - 5 Canada
  - 6 Japan
  - 7 Switzerland
  - 8 Germany
  - 9 Egypt
  - 10 Sweden

## PROFILE OF TRAVELLERS

### Nature of Overseas Travellers

- Brazilian travellers to Europe tend to come from the higher social classes, to be relatively affluent (with annual incomes of around US\$40,000 or more), well educated, multilingual and most commonly in their 30s and 40s. Less affluent people may also travel, but principally to their ancestral countries.
- São Paulo is the principal source of long-haul travellers, because of its huge size, its relative wealth and its concentration of multinational corporate headquarters. However, wealth is being diffused throughout the Centre-South and South regions – with the notable exception of the city of Rio de Janeiro, which continues its long decline since losing its status as the political capital of Brazil in the 1950s. The Centre-South and South also hold the lion's share of people of (non-colonial-Portuguese) European descent. In 2000 Embratur reported that 29% of outbound travellers were residents of São Paulo, 23% of Rio de Janeiro and 16% of Rio Grande do Sul.
- The travel trade stresses the importance of 31-59 year-olds in travel to Europe. 50-65 year-olds, with time to travel, form the second most important age group. 19-30 year-olds are in general not interested in Europe, but may go to learn languages (principally English or Spanish) or for technical instruction. There are an estimated 5,000 Brazilian students studying in Europe. Children hardly figure in European holiday trips: people generally do not see any point in taking children to Europe.
- Male travellers outnumber female long-haul travellers 60:40.
- Repeat travellers account for more than 50% of total trips.

### Occupations

#### **Outbound travellers by profession (%), according to Embratur (2000):**

Engineer	11.6	Merchant	6.0	Student	5.2
Teacher	7.4	Doctor	6.0	Entrepreneur	5.0
Administrator	6.1	Lawyer	5.2	Other	47.8

### Travel Companions

Brazilians generally travel alone or as a couple, rarely in formal groups. Travellers to Europe do not usually take their children with them. (VisitBritain reports that, of Brazilians visiting the UK in 2003, 50% were lone travellers, 25% in couples, 4% in family groups, 12% travelling with business colleagues and 7% travelling with friends).

## AIR TRANSPORT

### Airports

- Brazil's principal international airports are São Paulo (Guarulhos) and Rio de Janeiro (Galeão). In addition, limited numbers of international scheduled and/or charter flights use Salvador, Recife, Fortaleza, Natal, Manaus, Belém, Brasília, São Paulo (Congonhas), São Paulo/Campinas (Viracopos), Curitiba, Florianópolis, Porto Alegre and other airports, but only the first four of these are currently served by direct scheduled flights to Europe.
- Eleven airports in Europe are served by direct scheduled flights from Brazil: Amsterdam, Barcelona, Frankfurt, Lisbon, London (LHR), Madrid, Milan (Malpensa), Munich, Oporto, Paris (CDG) and Zurich.

### Airline Traffic / Capacity

#### Airlines operating non-stop services from Brazil to Europe, August 2006:

Airline	2006		2005	
	Flights	Seats	Flights	Seats
TAP Air Portugal	47	10,971	40	9,045
Air France	17	5,291	14	4,634
Iberia	15	3,838	10	2,593
TAM	13	2,925	2	450
British Airways	7	2,779	7	2,457
Lufthansa	7	2,730	14	5,145
KLM	7	2,289	7	2,289
Alitalia	7	2,037	7	2,037
Varig	7	2,002	49	13,434
Air Madrid	5	1,555	0	0
Swiss	5	1,250	5	1,250
Pluna	3	690	3	690
Air Europa	3	543	3	759
ALM	2	482	0	0
Condor	1	220	0	0
Total	146	39,602	164	45,471

- In July 2006, according to SRS Analyser, 16 airlines operated 176 weekly flights from Brazil to Europe (northbound data only), with a capacity of 47,800 seats. This compared with 177 flights and 49,013 seats weekly in July 2005.
- Airline flight and seat capacity fell much more sharply in August (see table below) due to the suspension of most of Varig's international services. The national flag carrier is operating precariously on a much reduced scale under a bankruptcy regime.
- The principal foreign carriers operating direct flights between Brazil and Europe (in order of weekly flight volume) include TAP Air Portugal, Air France, Iberia, Alitalia, British Airways, Lufthansa, KLM and Swiss. TAM is gaining ground as a Brazilian international carrier, including on routes to Europe and the USA. Other airlines operating direct scheduled services to Europe are: ALM (Netherlands Antilles-based, operating one flight weekly from Recife to Milan), Air Madrid, Condor, Air Europa (Spain-based), and Pluna (the Uruguayan national carrier, operating three flights a week from Montevideo via Rio to Madrid).
- American Airlines, United Airlines and Continental also offer connections to Europe through the USA, but Brazilians are required to have transit visas.
- Brazil retains one of the more tightly regulated air transport regimes, although charter flights were partly deregulated in 1998. There has been a significant growth in airline capacity to/from Europe and Salvador, but this is almost exclusively for Brazil-bound European holidaymakers.

- Flight capacity between Europe and Brazil has been tight in recent years, and the situation has been exacerbated in 2006 by Varig's precarious situation (Varig reduced its weekly flights to Europe from 49 to 7 between August 2005 and August 2006). Nevertheless, the situation is beginning to improve, since a number of airlines (mainly European) have decided to increase their number of flights to/from Brazil – 27 new frequencies are expected to be added by the end of the year. Flights to the UK are due to be increased to 21 weekly from November 2006, with TAM handling 7 of these.

**BSP airline tickets to Europe paid for and issued in Brazil, 2004-05 ('000)**

Destination	2005	2004	% change
Portugal	370	307	20.7
Italy	271	226	19.9
Spain	270	230	17.8
France	256	236	8.3
UK	175	153	14.2
Germany	174	153	13.6
Other	267	236	13.1
Total Europe	1,783	1,541	15.7

BSP ticket sales (through IATA's Billing & Settlement Programme) have continued to increase in 2006, albeit at a slower pace than in 2005. Also, sales for Germany have shown a decline despite the FIFA World Cup. This may be attributable to the fact that some scheduled passenger traffic switched to charters organised to carry people to Germany for the event.

## TRAVEL PLANNING & BOOKING

### Travel Formalities

- Brazilian tourists do not require visas for the Schengen countries, the UK/Ireland and most of the rest of Europe.
- Travel to, or via, the USA has become more difficult for Brazilians because of lengthier, tighter and more complex visa requirements. It now typically takes 42-140 days just to receive an appointment for an interview at the US Embassy – an obligatory step in the process to acquire a visa – and a non-refundable visa fee of US\$100 has to be paid in advance.

### Travel Decisions

- IPK International's Brazil Travel Monitor suggests that 49% of Brazilians book their trips abroad more than one month in advance while 21% make their bookings 13-30 days ahead of their trips. But decisions re travel are being taken later and later.
- Brazilians tend to make travel arrangements for Europe in stages and to book their flights and accommodation separately. Those buying package tours often wait until they reach Europe to book them.

### Booking Methods

- According to Embratur, 38% of outbound trips are organised by a travel agent.
- Brazilians' use of the travel trade is similar to that of the Argentines, for whom VisitBritain reported in 2003 that, although 63% of visitors to the UK used a travel agent to arrange their trips, only 13% preferred escorted tours and most chose to travel with a flexible itinerary largely without advance reservations.
- In 2001, according to IPK's study, inclusive tour packages (ITs) accounted for 23% of all outbound trips, but The Travel Business Partnership's research among European inbound tour operators suggests this share has fallen.

### Information Sources

- eMarketer reports that for travel information for domestic and international trips, 50% use personal recommendations, 36% web search, 29% TV, 13% newspapers, 13% consult a travel agency, and 7% use other sources.



---

## Internet & Media

---

- According to eTForecasts, 25.9 mn Brazilians currently have access to the internet – the highest proportion in South America, and the market expected to grow the fastest – and there are an estimated 13.4 mn active home users.
- Nielsen Net Ratings says that 3.9% of active internet users went to travel websites (presumably excluding airline sites) in 2003. But the actual number of trips booked online is still very low.
- However, a very high proportion of Brazilians rich enough to think of travelling to Europe are likely to use the internet as a key information source.

---

## TRAVEL TRADE PROFILE

---

### Tour Operators

---

- An estimated 23% of Brazilian travellers to Europe book package tours.
- Most of the packages bought are from international operators such as Trafalgar. Brazilian-based tour operators and travel agents tend to offer packages put together by European tour operators – usually not tailored to Brazilian tastes and requirements.
- Many of these tour packages are purchased after Brazilians arrive in Europe – especially those who speak reasonable English and are not concerned about having Portuguese-speaking guides. Some buy more than one package.
- Major Brazilian tour operators selling Europe include ADV Viagens e Turismo, CVC, Queensberry Viagens e Turismo, Soft Travel, New Age and Flot Operadora.

---

### Retail Travel Agencies

---

- Brazil has about 6,300 travel agencies handling international travel, but it is believed that only about 65 have sales exceeding US\$1 mn.
- Moreover, some 67% of trips abroad do not involve travel agencies.
- The principal CRS systems in use are Amadeus, Galileo and Sabre.

---

## KEY TRENDS AND FORECASTS

---

### Key Characteristics of Brazilian Outbound Travellers

---

- Leisure travel to Europe from Brazil is very largely the preserve of the affluent. Middle-class Brazilians of more modest means focus their holiday aspirations on travel within Brazil, or in neighbouring destinations of Latin America, and would not normally consider Europe except for VFR, business or study.
- Europe attracts a roughly equal share of first-timers and repeaters.
- The majority of Brazilian travellers to Europe are over the age of 35 but there is increasing interest from among the 20-34-year age segment.
- Around 50% of leisure travellers to Europe are travelling alone or as a couple.
- Some 20,000 tour packages (charter flight with – in some cases – basic hotel accommodation) were sold for the FIFA World Cup in Germany this year.

---

### Short-term Prospects

---

- The Brazilian outbound travel market is certainly booming, but this boom is essentially a recovery and cannot be expected to continue indefinitely.
- Nevertheless, Brazil is a prospering, middle-income country with plenty of scope for extending its (at present modest) appetite for overseas travel.
- Demand for travel has also been stimulated in 2004-05 by the improved economic situation and dramatically increased purchasing power of the Real abroad.

- Europe has a natural advantage in this market because of the large numbers of people of European descent, but it is regarded as a distant and expensive destination.
- The appreciation of the Real against both the US dollar and the euro is making long-haul travel less expensive.
- Although the situation seems to be improving, the precarious situation of Brazil's national carrier, Varig, has resulted in a serious shortage of airline seat capacity, with the numbers of seats available unable to meet demand. This has also resulted in higher airline ticket prices.

## NOTES

- a Multiple responses possible/percentages add up to more than 100%
- e Estimates
- f Forecasts

## SOURCES OF INFORMATION

### Principal statistical sources (by section):

- **Country Profile:** International Monetary Fund (IMF); United Nations Department of Economic & Social Affairs Population Division; Instituto Brasileiro de Geografia e Estatística (IBGE); The Economist Intelligence Unit (EIU)
- **Travel Profile:** Embratur; World Tourism Organization (UNWTO); IPK International; Anholt-GMI Nation Brands Index; VisitBritain; German National Tourist Board (DZT)
- **Profile of Travellers:** Embratur; IPK International; VisitBritain, The Travel Business Partnership (TBP) from various industry sources
- **Air transport/Airlines:** Departamento de Aviação Civil (DAC); SRS Analyser, IATA BSP
- **Travel Planning and Booking:** *ETC Media Review*; The Travel Business Partnership
- **Travel Trade Profile:** Associação Brasileira de Operadoras de Turismo (BRAZTOA); *ETC Media Review*; VisitBritain

## FURTHER INFORMATION

Ministério de Turismo	<a href="http://www.insitucional.turismo.gov.br">www.insitucional.turismo.gov.br</a>
Instituto Brasileiro de Turismo – EMBRATUR	<a href="http://www.embratur.gov.br">www.embratur.gov.br</a>
Associação Brasileira de Agências de Viagem (ABAV)	<a href="http://www.abav.com.br">www.abav.com.br</a>
Associação Brasileira de Operadoras de Turismo (BRAZTOA)	<a href="http://www.braztoa.com.br">www.braztoa.com.br</a>
Associação Brasileira da Indústria de Hotéis (ABIH)	<a href="http://www.abih.com.br">www.abih.com.br</a>
National Civil Aviation Agency (ANAC, formerly DAC)	<a href="http://www.dac.gov.br">www.dac.gov.br</a>
INFRAERO (National airports operator)	<a href="http://www.infraero.gov.br">www.infraero.gov.br</a>
Instituto Brasileiro de Geografia e Estatística (IBGE)	<a href="http://www.ibge.gov.br">www.ibge.gov.br</a>
Brazilian Educational and Language Travel Association (BELTA)	<a href="http://www.belta.org">www.belta.org</a>
IPK International (World Travel Monitor Company)	<a href="http://www.ipkinternational.com">www.ipkinternational.com</a>

## CONTACT DETAILS

---

### ETC Executive Unit

---

Lisa Davies  
Co-ordinator ETC Market Intelligence Group (MIG)  
European Travel Commission  
19A Avenue Marnix (PO Box 25)  
1000 Brussels  
Belgium  
Tel: +32 (0) 2 548 9000  
Fax: +32 (0) 2 514 1843  
Corporate website: [www.etc-corporate.org](http://www.etc-corporate.org)  
Email: [info@etc-corporate.org](mailto:info@etc-corporate.org)

---

### ETC Latin America Operations Group

---

Ms Teresa Ortiz  
Chairman ETC Latin America  
c/o Centro Oficial de Turismo Español São Paulo  
Rua Zequinha de Abreu 78  
Cep 01250-050 São Paulo  
Brazil  
Tel: +55 (0) 11 367 52 000  
Fax: +55 (0) 11 387 20 733  
Email: [teresa.ortiz@tourspain.es](mailto:teresa.ortiz@tourspain.es)