

Fifa World Cup shakes Brazilian Tourism trends

The Study



Main findings



10 main source countries

10

International arrivals



Domestic travel



Host cities



Outbound Tourism from Brazil



Trends





A study performed by Spanish company Forward Data together with Pires & Associados in Brazil analyzes air reservations to Brazil for arrivals during the Fifa World Cup period.

Forward Data, Publisher of ForwardKeys®, is a leading provider of operational business intelligence to national tourist boards, hotel chains, retailers and other businesses interested in monitoring and anticipating travellers flows. This enables marketers to make tactical decisions based on hard facts on demand and trends, helping improve their businesses performance in the medium term.

120 days away from the kick off of the Fifa World Cup event, ForwardKeys® research unveils rare findings on how it will affect Brazilian tourism.

Pires & Associados has 20 years experience in Tourism sector and is specialised in Commercial Intelligence and Tourism Consulting. The company is responsible in Brazil for the analysis and broadcast of the research. Coordinated by Jeanine Pires, expert in tourism sector and ex-president of Embratur, this study will offer private and public national tourism leaders a unique insight into trends on the impact of the World Cup while demand builds up, so they can adjust their strategies. Data will be updated on a regular basis prior to the event.

Main findings



Forward looking from 120 days distance to FIFA World Cup 2014 / air travelers arrivals based on already processed bookings.

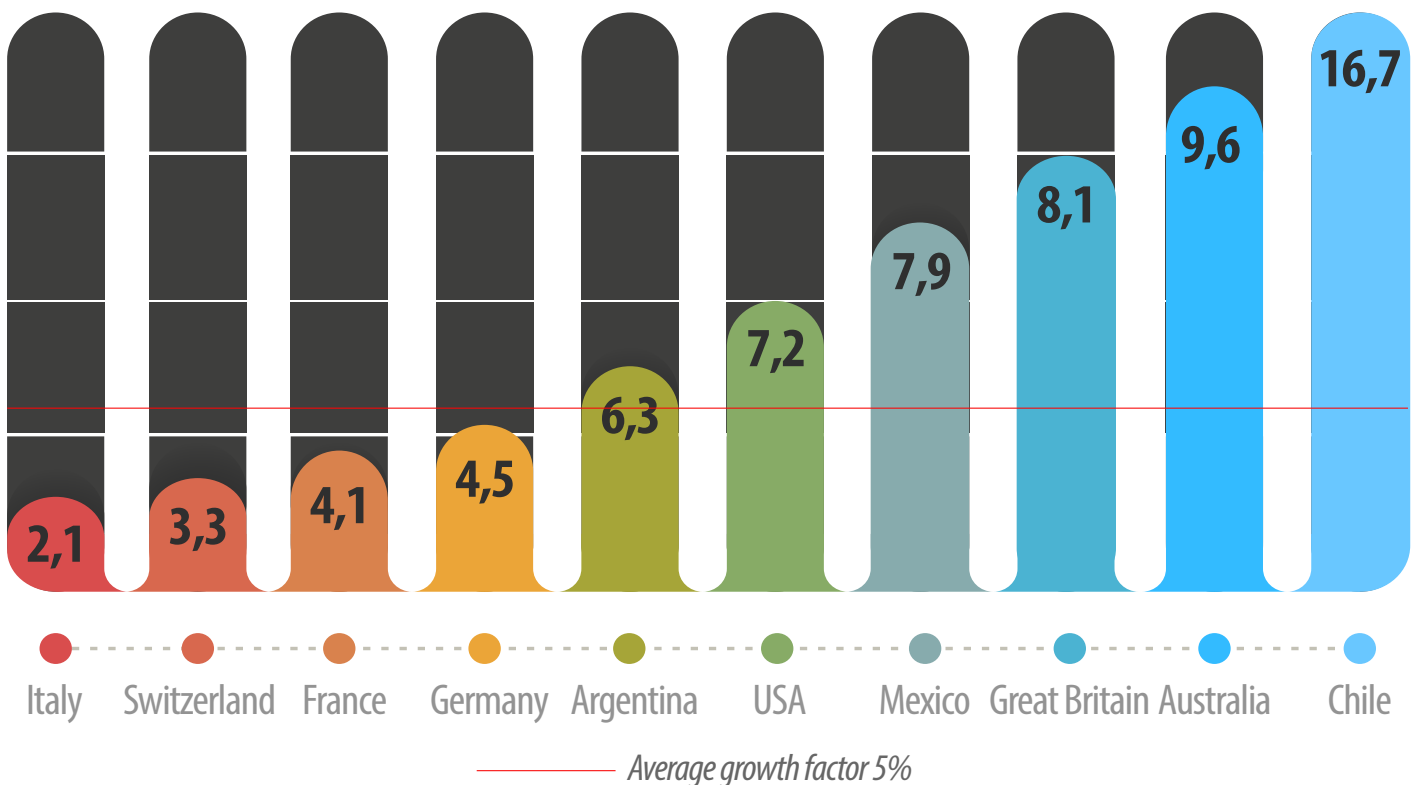
- The number of reservations to be in Brazil during the Copa period is 5 times higher than last year.
- The number of reservations for arrival during the months of June and July 2014 is 3 times higher than 2013.
- Main source countries of bookings for arrivals during FWC are: the USA, Germany and the U.K.

- Ranking of host cities as per actual bookings: 1. Rio de Janeiro, 2. São Paulo, 3. Salvador, 4. Fortaleza, 5. Recife, 6. Belo Horizonte, 7. Brasilia, 8. Natal, 9. Manaus, 10. Porto Alegre, 11. Curitiba and 12. Cuiabá.
- South America also sees an increase in its air bookings for arrivals during June and July 2014 (except for Argentina, Venezuela and Suriname).
- Outbound bookings from Brazil tend to fall during the final period of FWC (June 27th to July 13th) while increasing in June (including initial period of tournament) and after the event (July 14th to August 31st)

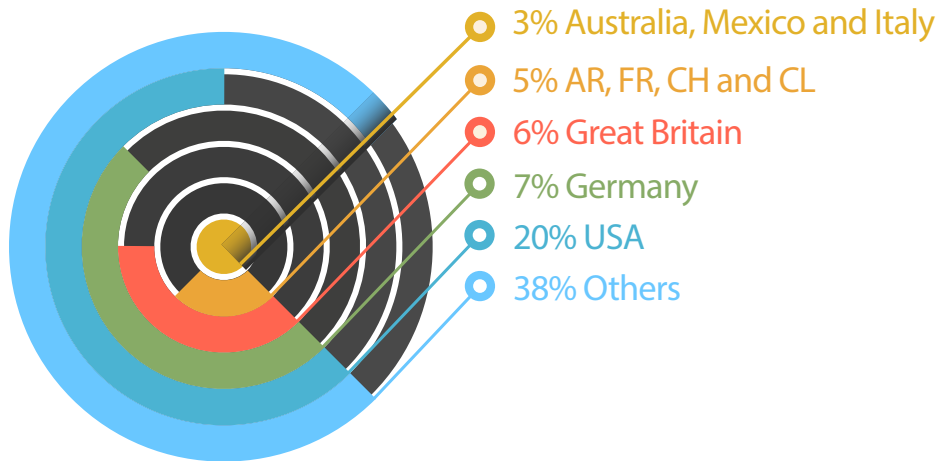
10 main source countries 10

Countries whose national teams will play in the tournament are main source of bookings for arrivals during FWC. Fans do follow their selections. The USA is main source country, while Chile, Australia and Great Britain have highest growth amongst top ten. Even Italy duplicates its bookings as compared with 2013, although it is the least growing country within the top ten.

Growth Factor for top 10 source countries (2014 vs 2013)



Main source countries according to bookings up to 120 days

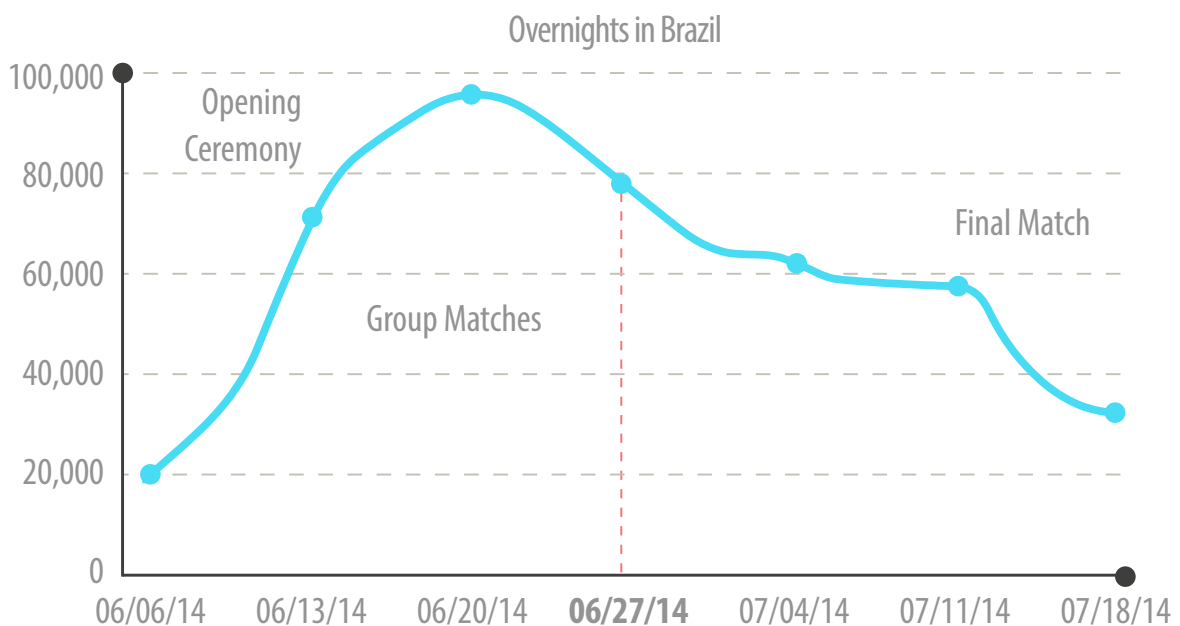


International arrivals

Bookings for arrival during the FWC period are 5 times higher than those registered during the same period in 2013, and bookings for arrival during June 1st to July 31st grow by a factor of 3. The growth in bookings augures a successful event, even though at this moment its magnitude is mainly due to travelers booking very early, and it will slow down in future dates.

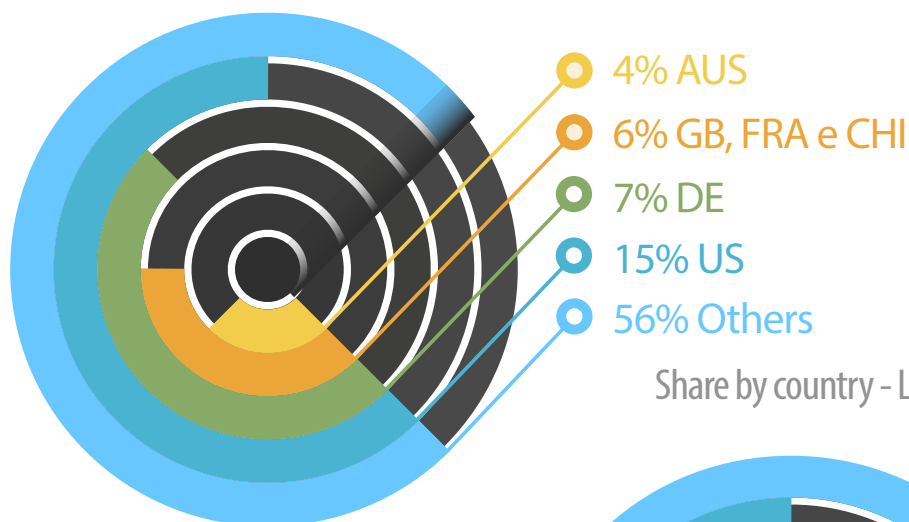
During the Opening Ceremony (June 12th), bookings are 21 times higher than same period in 2013, indicating that travelers want to join the events from the first day.

Overnights in Brazil will cluster during the initial period of the Copa, from the Opening Ceremony until the end of June. There is a pronounced decrease after the last match, on July 13th.

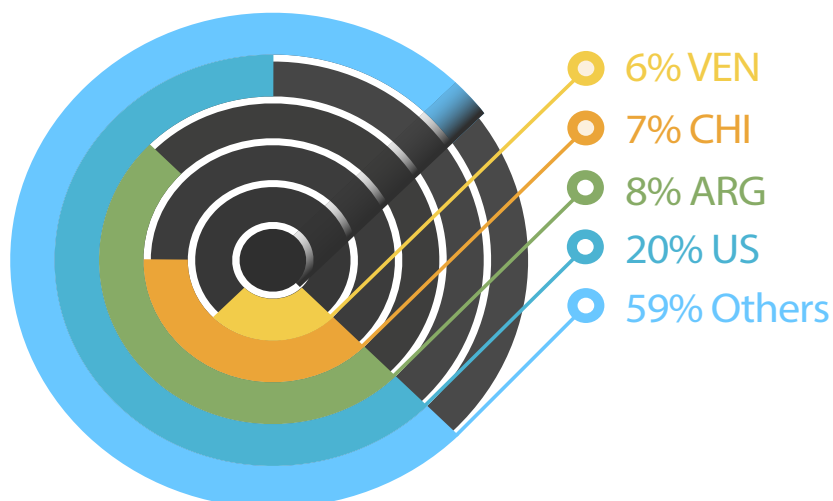


Visitors from long haul countries tend to have longer lengths of stay than those from the region.

Share by country - Length of stay > 14 days



Share by country - Length of stay 1 to 5 days



Domestic travel

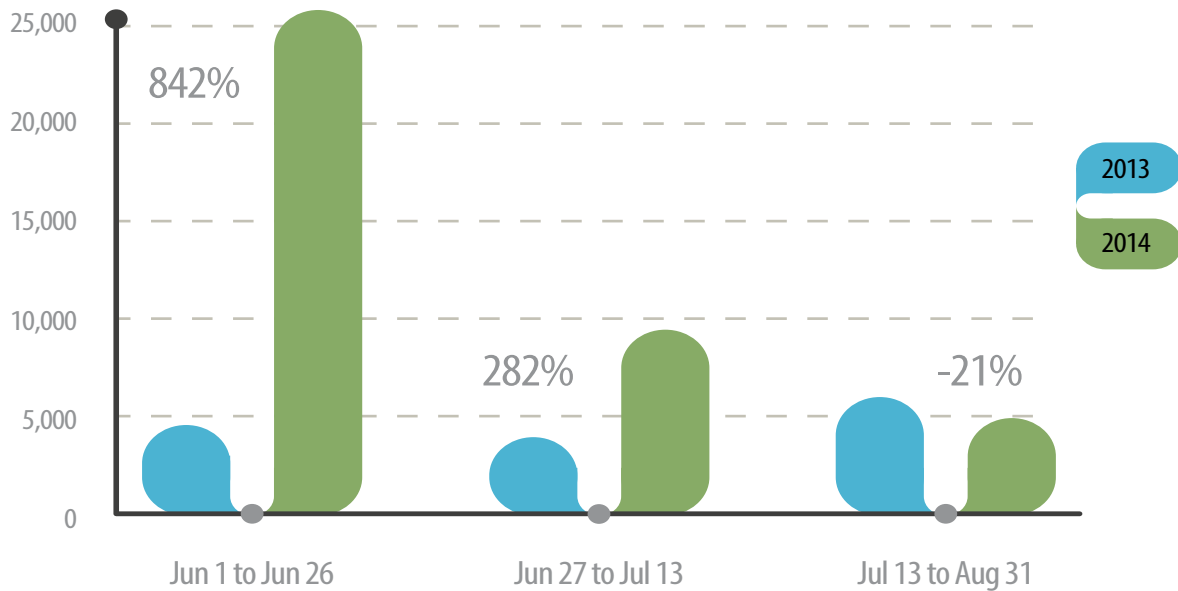


Skyrocketing domestic bookings for travels within the June to August period show threefold growth when compared to the same period in 2013, and even a factor of 9 when considering the June 1st to 26th period (including the first stages of the tournament). After the tournament, there is a -20% decrease in domestic bookings.

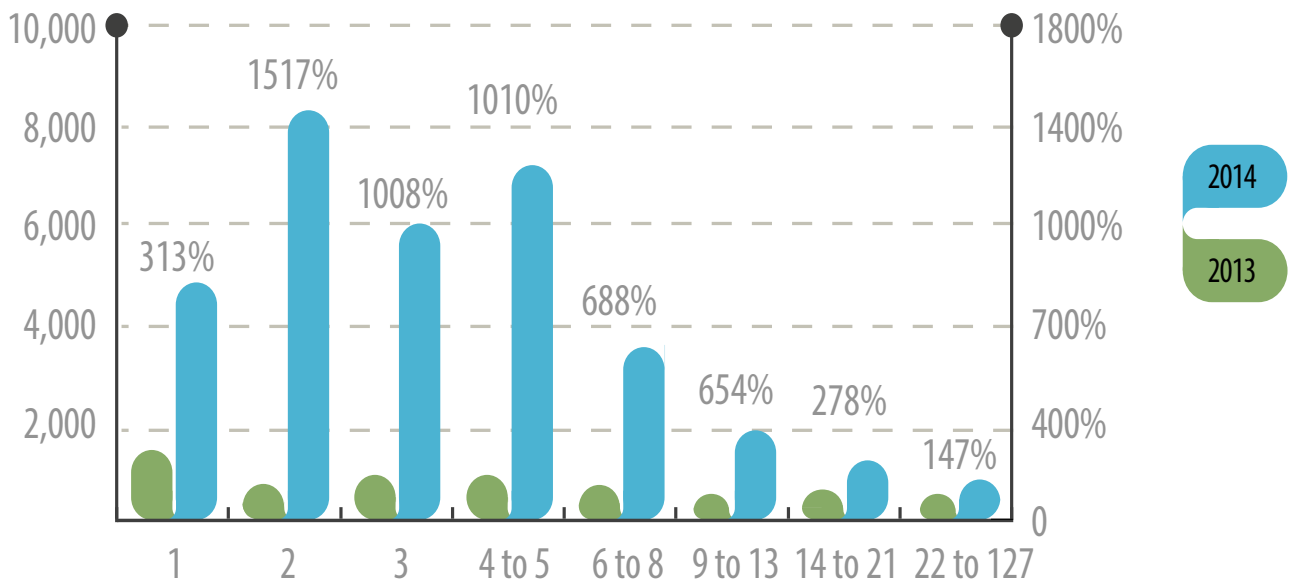
As there is still no information on which selections will be playing further stages, fans might wait further to make their reservations.

The main growth within domestic issued bookings belongs to trips with lengths of stay between 2 and 5 nights.

Domestic Bookings - Brazil



Lengths of Stay - Domestic trips during FWC



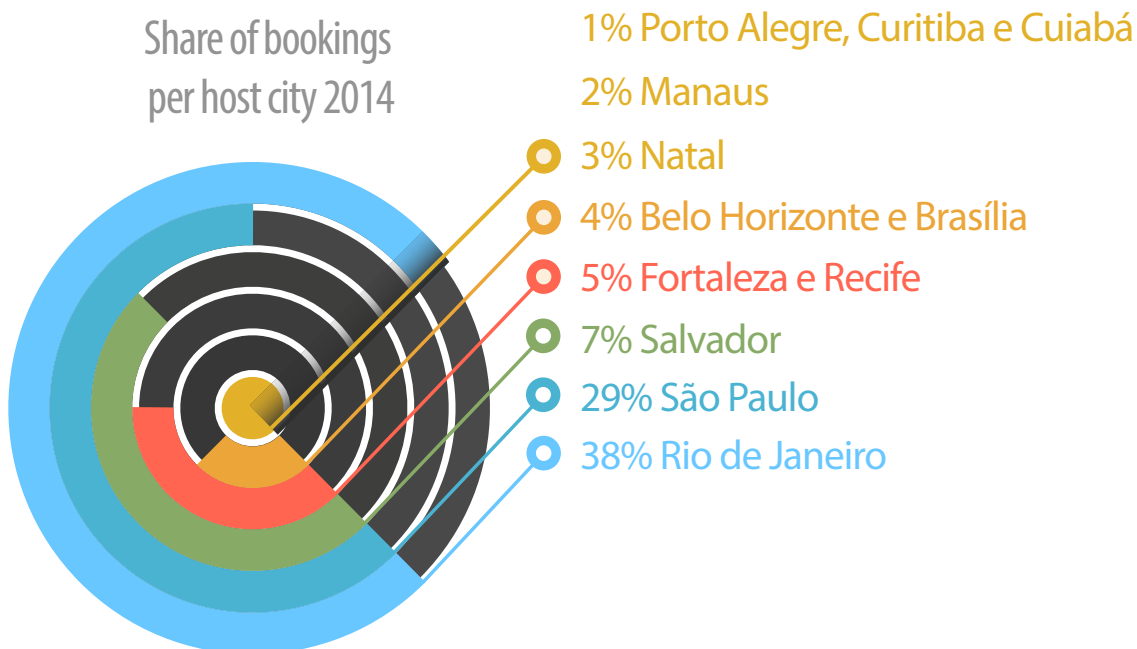
Host cities



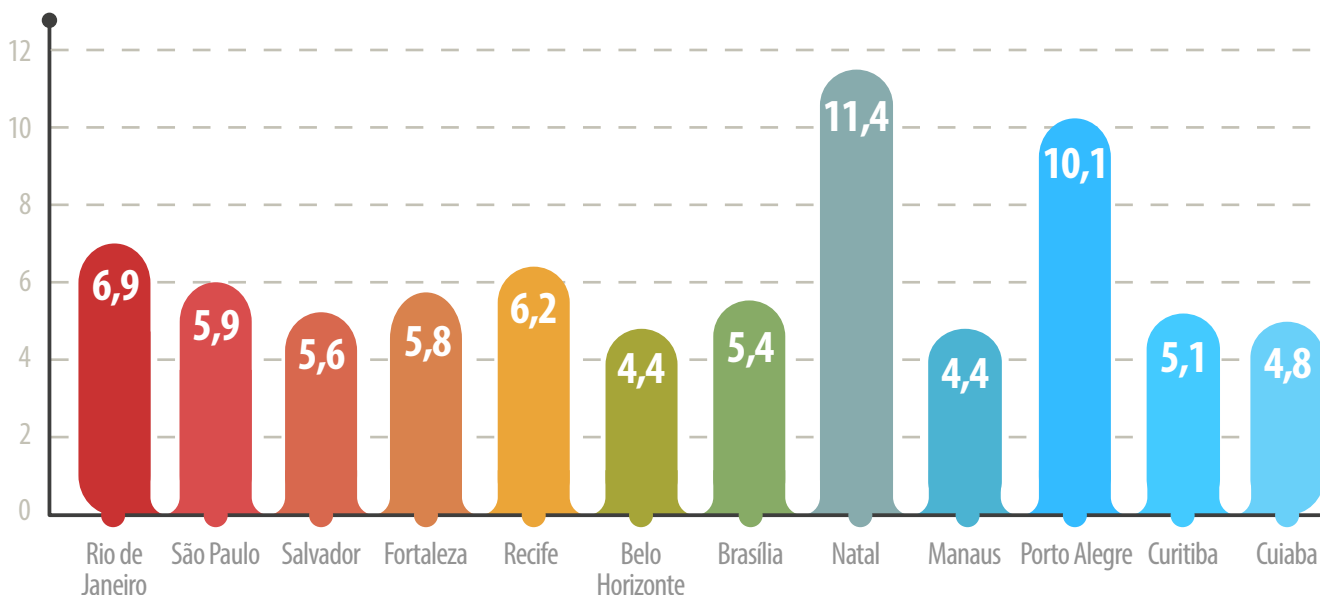
Rio de Janeiro has increased its share of bookings for arrival during the Copa from 34% to 38% as compared with same period in 2013, but São Paulo loses 4% of its 2013 share.

Natal is the highest growing host city in 2014.

Share of bookings per host city 2014



International bookings growth factor for host cities during the FWC



Rio de Janeiro

Will receive visitors during Opening Ceremony and all seven scheduled matches during first and second stage of the tournament (Bósnia-Herzegovina X Argentina, Spain and Chile, Belgium and Russia, Ecuador and France). Bookings for arrivals during FWC show a +590% increase at 120 days, with peaks days prior to each of the scheduled matches.

Tourists with bookings to Rio de Janeiro come mainly from the USA (21%), the United Kingdom (8%) and Argentina (7%). Around 50% of these bookings will stay between 9 and 21 days, with the possibility to make local movements during this period.

6% of bookings already issued for Rio show previous steps in other host cities. 2% will make three stops, mainly in Salvador, Sao Paulo and Fortaleza.

São Paulo

Data show a +493% increase in international bookings issued for the FWC. Most originate from the USA (14%), Venezuela (8%) and Chile (7%), with arrival peaks days prior to each scheduled match.

25% of all bookings show a length of stay between 14 and 21 days, and prior to reaching São Paulo, 5% of the travelers will have made at least one previous stop mainly in two other host cities. Most visited ones being Rio and Fortaleza.

Matches in São Paulo: Opening Brazil and Croatia, Uruguay and England, The Netherlands and Chile.

Salvador

The research shows a +457% growth in bookings for FWC. Main source countries are the USA (19%), Germany (15%) and Switzerland (11%).

21% of all bookings have lengths of stay between 14 and 21 days. Prior to reaching Salvador, around 11% will have done previous stops, mainly in Rio and Fortaleza.

Matches in Salvador: Spain and The Netherlands, Germany and Portugal, Switzerland and France, Bosnia-Herzegovina and Iran.

Fortaleza

Bookings for Fortaleza show a +484% increase, mainly from the USA (20%), Germany (13%) and Switzerland (10%).

24% of all bookings have a length of stay from 14 to 21 days, while during this period other domestic trips could be done.

12% of travelers will make at least one previous step prior to arrival. Of those, most (6%) will make 2 steps, mainly to Salvador and Rio.

Games in Fortaleza: Uruguay and Croatia, Brazil and Mexico, Germany and Ghana, Greece and Ivory Coast.

Recife

Bookings show a growth of +518% for arrivals during FWC, mainly from the USA (31%), Germany (15%) and Switzerland (7%). Two thirds of travelers will spend more than 9 days.

13% of bookings have previous stops in other host cities, mainly in Fortaleza, Rio and Salvador.

Games in Recife: Ivory Coast and Japan, Italy and Costa Rica, Croatia and Mexico, the USA and Germany.

Brasília

Shows a growth of +435% in bookings as compared with 2013, with main source countries being the USA (27%), Switzerland (10%) and Colombia (7%), with arrival peaks within two days prior to each scheduled match. Half of visitors will stay more than 9 days, with one fourth staying more than 22.

9% of bookings have previous stops in at least another host city, mainly Rio and Belo Horizonte.

Matches in Brasilia: Switzerland and Ecuador, Colombia and Ivory Coast, Cameroon and Brazil, Portugal and Ghana.

Belo Horizonte

The research shows a growth in international bookings of +338% at 120 days prior to the event. Bookings belong mainly to the USA (25%), Colombia (9%) and the UK (7%).

32% of all bookings have a length of stay longer than 22 days, within which travelers might make internal trips. About 9% of visitors will have made previous stops, of which one third will stop in two host cities, mainly Rio and São Paulo.

Matches in Belo Horizonte: Colombia and Greece, Belgium and Algeria, Argentina and Iran, Ivory Coast and England.

Natal

This is the highest growing host city, for which bookings have grown by more than 1000%. Top bookings belong to travelers from the USA (29%), Uruguay (14%) and Italy (7%). The Italy and Uruguay match is scheduled for June 24th and most fans will arrive within the previous four days. 46% of all bookings have a length of stay between 9 and

21 days. Around 15% visitors will make previous stops prior to reaching Natal, mainly in São Paulo, Fortaleza and Rio.

Matches in Natal: Mexico and Cameroon, Ghana and USA, Japan and Greece, Italy and Uruguay.

Manaus

Shows a growth of +340% in international bookings for arrival during FWC. Actual top source countries for these bookings are the USA (38%), the UK (13%) and Switzerland (9%), with peaks of arrivals two days before England vs Italy and the USA vs Portugal matches.

The lengths of stay in Manaus are shorter than in other source cities: 38% of bookings have length of stay between 4 and 8 nights, and 13% will make previous steps prior to reaching Manaus, mainly in Rio, Salvador and Brasilia.

Matches in Manaus: England and Italy, Cameroon and Croatia, the USA and Portugal, Honduras and Switzerland.

Porto Alegre

There is a +909% growth in international bookings for arrivals during FWC, with top source countries being the USA (17%), France (10%) and Argentina (11%).

21% of all bookings have length of stay between 14 and 21 nights, with the possibility to travel to other destinations during this period. 13% of bookings have previous steps in mainly two or three other host cities, preferentially Rio de Janeiro, Salvador and Belo Horizonte.

Matches in Porto Alegre: France and Honduras, Australia and The Netherlands, Korea and Algeria, Nigeria and Argentina.

Cuiabá

At 120 days distance from FWC there is a +384% growth in international bookings, with top source countries being the USA (22%), Chile (20%) and Australia (10%), with the main peak of arrivals one day before the Chile and Australia match.

21% of all bookings have a length of stay of 2 nights.

22% of travelers will make previous stops in other host cities, mainly in Brasilia, Belo Horizonte and Rio.

Matches in Cuiabá: Chile and Australia, Russia and Korea, Nigeria and Bosnia-Herzegovina, Japan and Colombia.

Curitiba

There is a +405% growth in international bookings for arrivals during FWC. Top source countries are the USA (36%), Australia (8%) and Germany (7%), with highest peaks of arrivals prior to the first (Iran and Nigeria) and third (Australia and Spain) matches.

37% of travelers will stay between 9 and 21 days, but 44% of bookings have a length of stay shorter than 9 nights.

Matches in Curitiba: Iran and Nigeria, Honduras and Ecuador, Australia and Spain, Argelia and Russia.

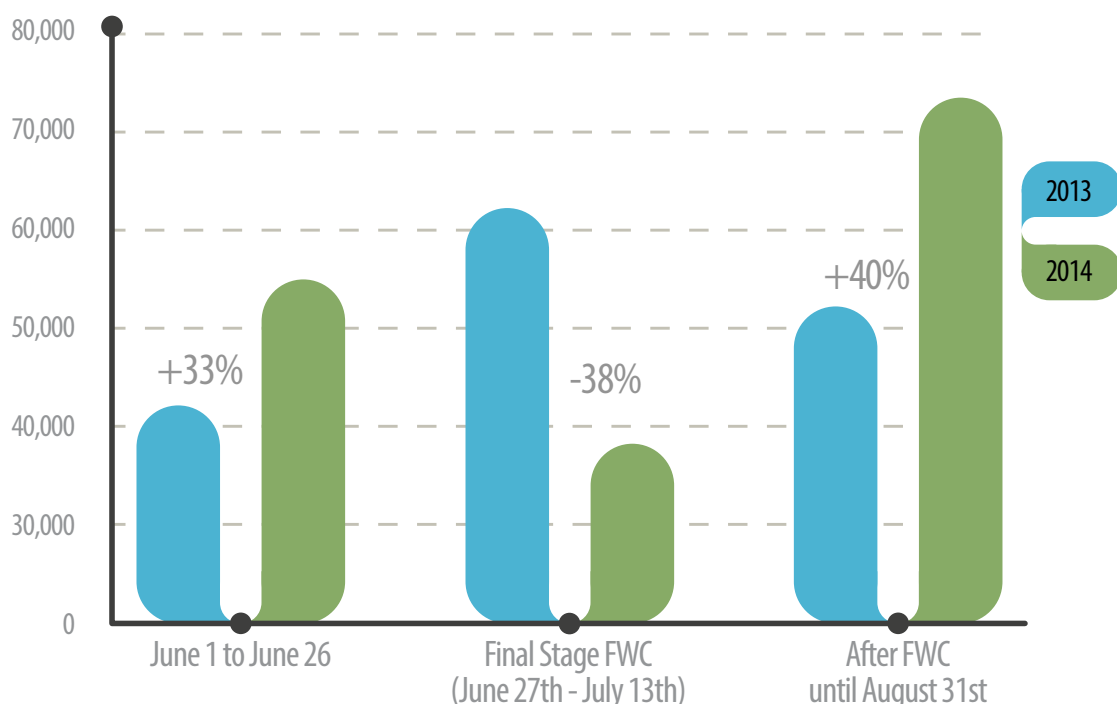
Outbound Tourism from Brazil



FIFA World Cup will alter Brazil outbound behaviour and trends when compared with 2013.

Bookings for travels between June 1st and June 26th have grown by +33%, and up to +40% after the tournament. Nevertheless, during the second stage of the tournament (from June 27th to July 13th) bookings issued at 120 days from FWC have decreased by -38%, showing that travelers will rather stay in Brazil during this period.

Outbound Brazil from June 1st to August 31st





The study shows that booking pace is quite similar to that of last Fifa World Cup in South Africa. This suggests that, like in South Africa, the booking pace will slow down as dates get closer to the tournament, resulting from a strong anticipation in booking (early bookings).

Technical Information

About Forward Data

Market Research Company Forward Data SL, a company registered in Spain, publishes www.forwardkeys.com. ForwardKeys.com is an innovating service bringing a new approach to operational traveller data intelligence for Hotels and Destination Management Organizations (DMOs) providing them with accurate passenger travel trends, variations and source markets to help them improve their business.

For more information about our company and services, please contact us at info@forwardkeys.com us, or visit our web site at www.forwardkeys.com.

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About Pires & Associados

Pires & Associados has 20 years experience in Tourism sector and is specialised in Commercial Intelligence and Tourism Consulting. The company is responsible in Brazil for the analysis and broadcast of the research, coordinated by Jeanine Pires, expert in tourism sector and ex-president of Embratur.

