

# Change in trends at 90 days distance from the FWC

The study



The companies



Main findings



10 principais emissores

10

Host cities



International arrivals



Overnights



Domestic travel



Outbound tourism



Inbound bookings to other South American countries





At 90 days from the World's most important football competition, Spanish company Forward Data together with Pires & Associados in Brazil release the second study of air reservations to Brazil for arrivals during the FIFA World Cup period – an update of the previous report, released 120 days before the event.



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.

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.



Forward looking from 90 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 4,5 times higher when compared to same dates in 2013. The factor has decreased by only 0,5 when compared with the previous report.

- The number of reservations for arrival during the months of June and July 2014 is 2,6 times higher than 2013. This factor has decreased by 0,4 when compared with last report. Above variations reflect the natural slowdown of bookings that went to the roof when tickets became available.
- Main source countries of bookings for arrivals during FWC are: the USA, Germany and Argentina – the latter now gaining the third position and leaving the U.K. out of the top 3 ranking. Ranking of host cities as per actual bookings: 1. Rio de Janeiro, 2. São Paulo, 3. Salvador, 4. Fortaleza, 5. Recife, 6. Brasilia, 7. Belo Horizonte, 8. Natal, 9. Manaus, 10. Porto Alegre, 11. Curitiba and 12. Cuiabá. As compared with last month's report, Brasilia jumps one position to the 6th.
- Outbound Tourism from Brazil shifts high season from July to June. Overnights maxima are reached by mid June, and drop to last year's values on the week of the final football match, showing a tendency for Brazilians to be back home for the end part of the competition.
- International bookings to other South American destinations see an increase for arrivals during June and July 2014 (+1%), therefore suggesting that FIFA World Cup is not cannibalizing bookings to Brazil's neighbour countries at this stage.

## 10 main source countries

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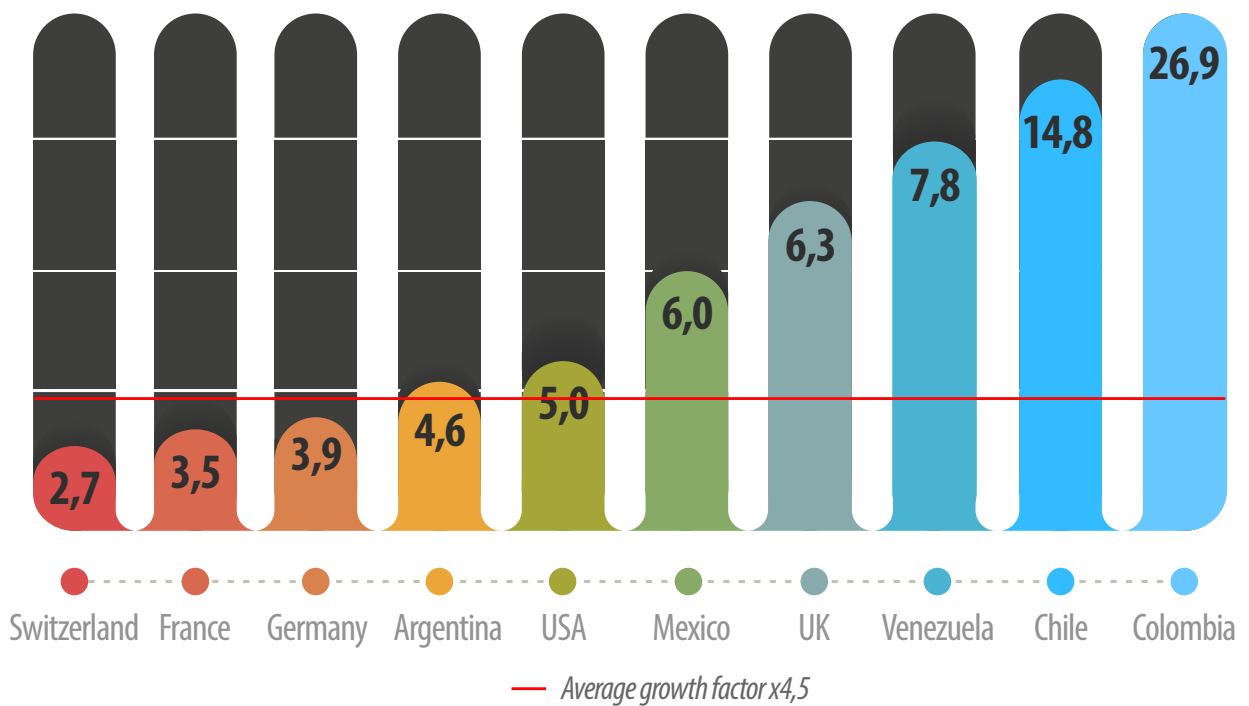
Top 10 ranking for source countries now includes Venezuela and Colombia, 2 nations that were actually not selected to compete. South American source countries are winning positions in the ranking, leaving other Long Haul countries behind, such as Italy and Australia.

Colombia shows the highest growth since the beginning of the study, with an impressive factor of x 26,9 when compared to 2013 bookings.

Argentina jumps from fourth to third position, bypassing the U.K., and Chile leaves France and Switzerland behind.

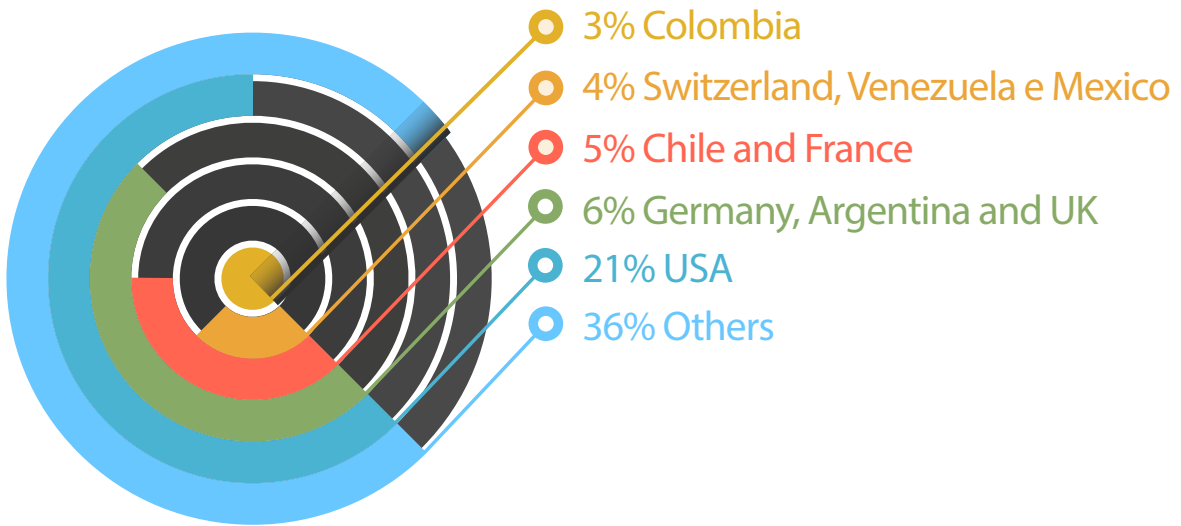
Country	Position at 120 days	Position at 90 days	Variation
U.S.A.	1	1	0
Germany	2	2	0
Argentina	4	3	+1
U.K.	3	4	-1
Chile	7	5	+2
France	5	6	-1
Switzerland	6	7	-1
Venezuela	--	8	0
Mexico	9	9	0
Colombia	--	10	0

Growth Factor for top 10 source countries. 2014 vs 2013.



Top 10 countries this month represent 64% of all bookings, reaching higher representativity than last month, when their total share was 62%. Also, it's interesting to note that the U.S.A. gains 1% in share when compared with previous report.

Share of bookings  
for source countries

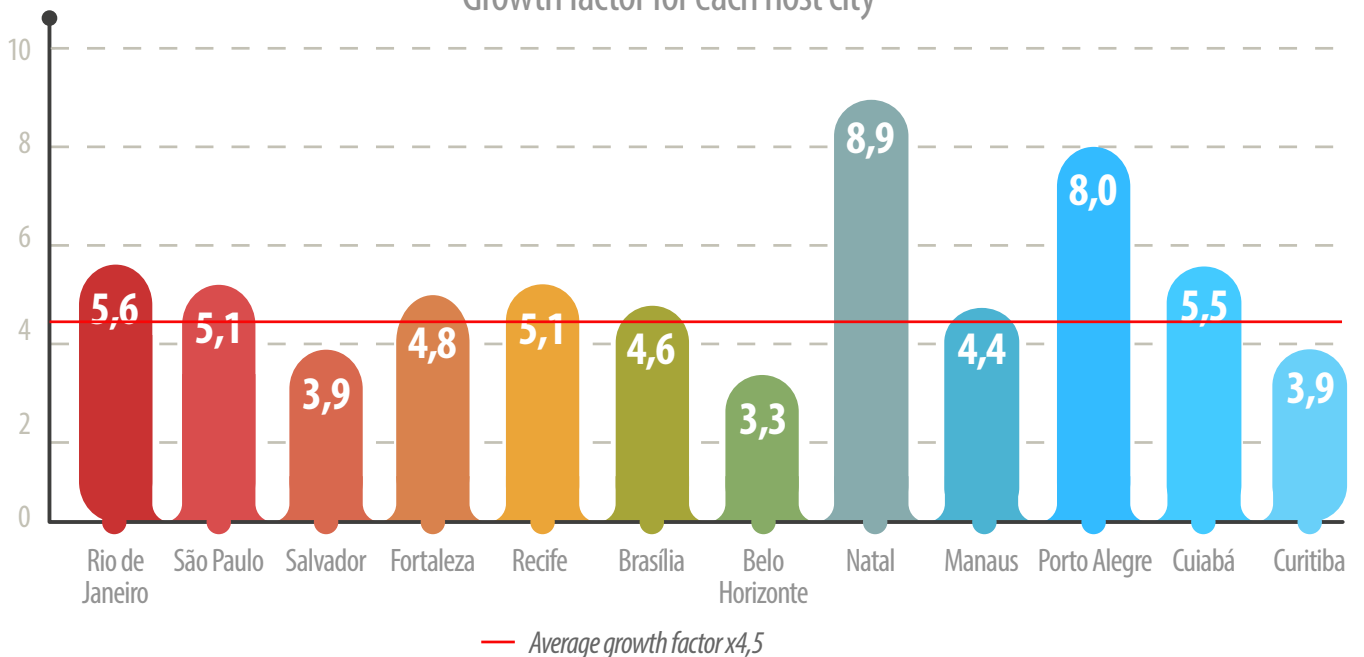


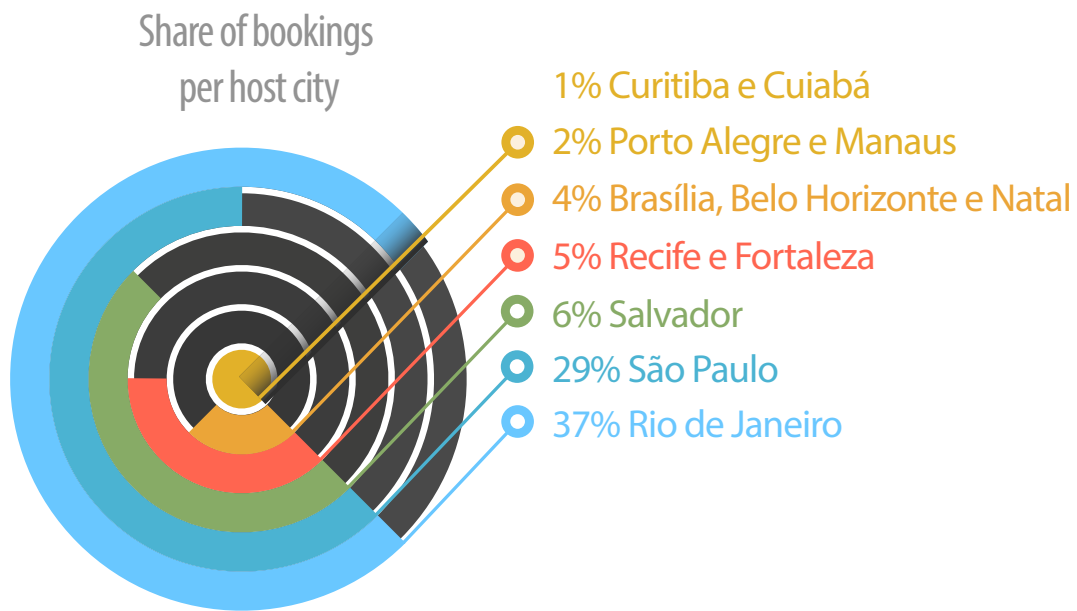
Host cities



- Rio de Janeiro and São Paulo remain the highest shares within all 12 host cities.
- Natal remains the highest growing host city, with Porto Alegre following closer than a month ago.

Growth factor for each host city





Country	Position at 120 days	Position at 90 days	Variation
Rio de Janeiro	1	1	0
São Paulo	2	2	0
Salvador	3	3	0
Fortaleza	4	4	0
Recife	5	5	0
Brasília	7	6	+1
Belo Horizonte	6	7	-1
Natal	8	8	0
Manaus	9	9	0
Porto Alegre	10	10	0
Curitiba	11	11	0
Cuiabá	12	12	0

### Detail per host city:

#### Rio de Janeiro

- Growth in bookings: +463%.
- Main source countries: the U.S.A. (21%), the U.K (8%) and Argentina (8%).
- 46% of all bookings have a length of stay from 9 to 21 days.
- 6% of travelers will make previous stops in other host cities, and most previously visited cities by these travelers are Salvador, São Paulo and Fortaleza.

## **São Paulo**

- Growth in bookings: +412%.
- Main source countries: the U.S.A. (14%), Chile (8%) and Venezuela (7%).
- 24% of bookings have a length of stay from 14 to 21 days.
- 5% of travelers will make previous stops in other host cities, mainly in Rio de Janeiro and Fortaleza.

## **Salvador**

- Growth in bookings: +292%.
- Main source countries: the U.S.A. (20%), Germany (14%) and Switzerland (10%).
- Lengths of stay of those bookings are distributed from a week to more than three weeks.
- 11% of travelers will make previous stops in other host cities, mainly in Rio de Janeiro and Fortaleza.

## **Fortaleza**

- Growth in bookings: +382%.
- Main source countries: the U.S.A. (22%), Germany (11%) and Uruguay (9%).
- 60% of bookings have a length of stay longer than 9 days.
- 11% will have made previous stops in other host cities prior to reaching Fortaleza, mainly in Salvador and Rio de Janeiro.

## **Recife**

- Growth in bookings: +413%.
- Main source countries: the U.S.A. (32%), Germany (14%) and Mexico (7%).
- Two thirds of visitors will stay longer than 9 days.
- 14% of travelers will have made previous stops in other host cities, mainly Rio de Janeiro, Fortaleza and Salvador.

## **Brasília**

- Growth in bookings: +360%.
- Main source countries: the U.S.A. (27%), Colombia (10%) and Switzerland (8%).
- 34% of all bookings have a length of stay between 9 and 21 days.
- 12% of travelers will visit other host cities prior to reaching Brasília, mainly Belo Horizonte and Rio de Janeiro.

## **Belo Horizonte**

- Growth in bookings: +234%.
- Main source countries: the U.S.A. (26%), Colombia (11%) and Argentina (9%).
- 8% of bookings show previous stops in other host cities. Two main previously visited cities are Rio de Janeiro and São Paulo.

## **Natal**

- Growth in bookings: +791%.
- Main source countries: the U.S.A. (29%), Uruguay (14%) and Italy (7%).
- 45% of all bookings have length of stay from 9 to 21 days.
- 13% of passengers will make previous stops prior to reaching Natal, mainly in São Paulo, Fortaleza and Rio.

## **Manaus**

- Growth in bookings: +342%.
- Main source countries: the U.S.A. (39%), the U.K. (11%) and Venezuela (9%).
- 21% of bookings have a length of stay from 6 to 8 days, shorter than other host cities.
- 16% of travelers will visit other host cities prior to reaching Manaus. Most of them will be visiting Rio de Janeiro, Salvador and Natal.



## Porto Alegre

- Growth in bookings: +696%.
- Main source countries: the U.S.A. (17%), Argentina (16%) and France (10%).
- 19% of bookings have a length of stay between 14 and 21 days.
- 14% will make previous stops in other host cities, mainly Rio de Janeiro, Salvador and Belo Horizonte.

## Cuiabá

- Growth in bookings: +445%.
- Main source countries: Chile (23%), the U.S.A. (20%) and Colombia (13%).
- 60% of all bookings have a length of stay shorter than a week.
- 22% of travelers will previously visit other host cities, mostly Brasilia, Belo-Horizonte and Rio de Janeiro.

## Curitiba

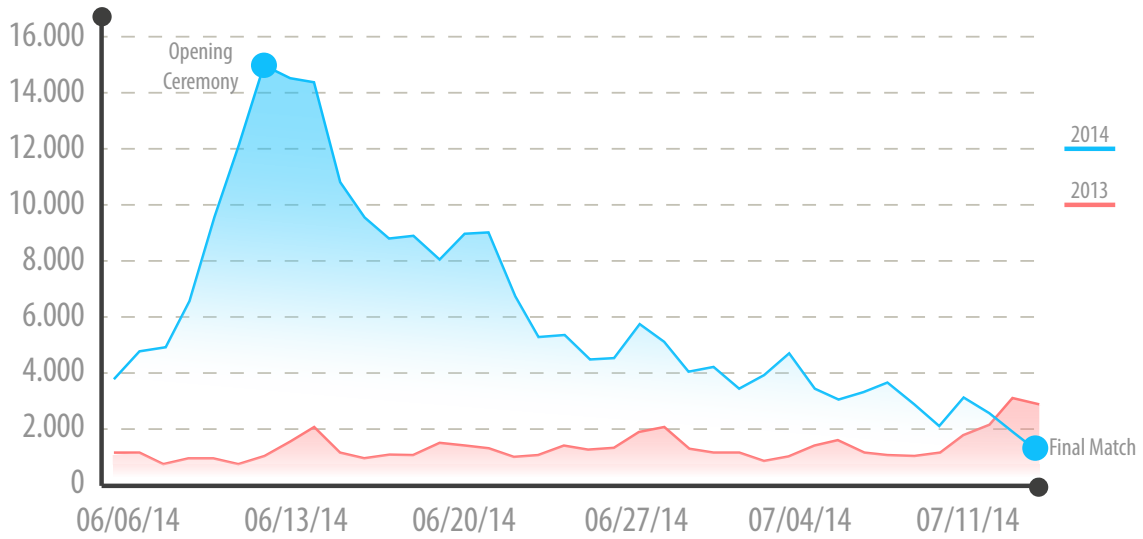
- Growth in bookings: +288%.
- Main source countries: the U.S.A. (35%), Australia (6%) and Germany (6%).
- 37% of all bookings show a length of stay from 9 to 21 days.
- 15% of travelers will previously visit other host cities, such as Rio de Janeiro, Porto Alegre and Brasilia.

## International arrivals

Bookings for arrival during the FWC period are 4,5 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 2,6. As expected, growth factors have seen a slight reduction since last month (0,5 and 0,4 respectively), and it will face further adjustment as dates grow nearer the start of the competition.

At this stage, most arrivals are concentrating at the beginning of the tournament, with highest peak on June 12th, when Opening Ceremony will take place, with a factor of x 15 when compared with bookings for 2013.

Bookings for international arrival in Brazil

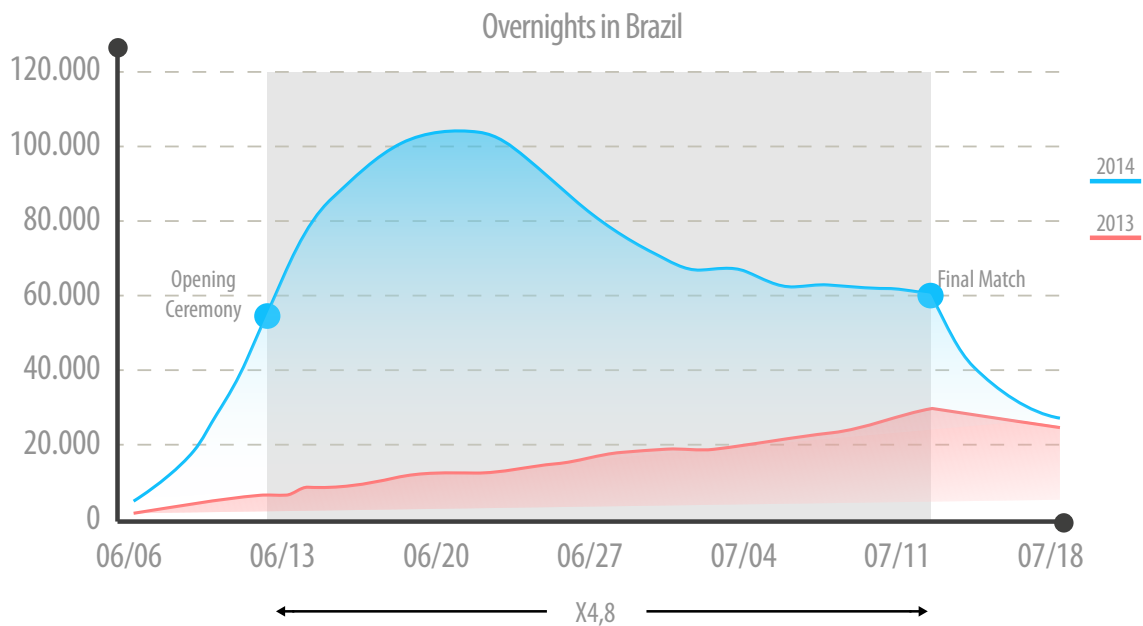


## Overnights



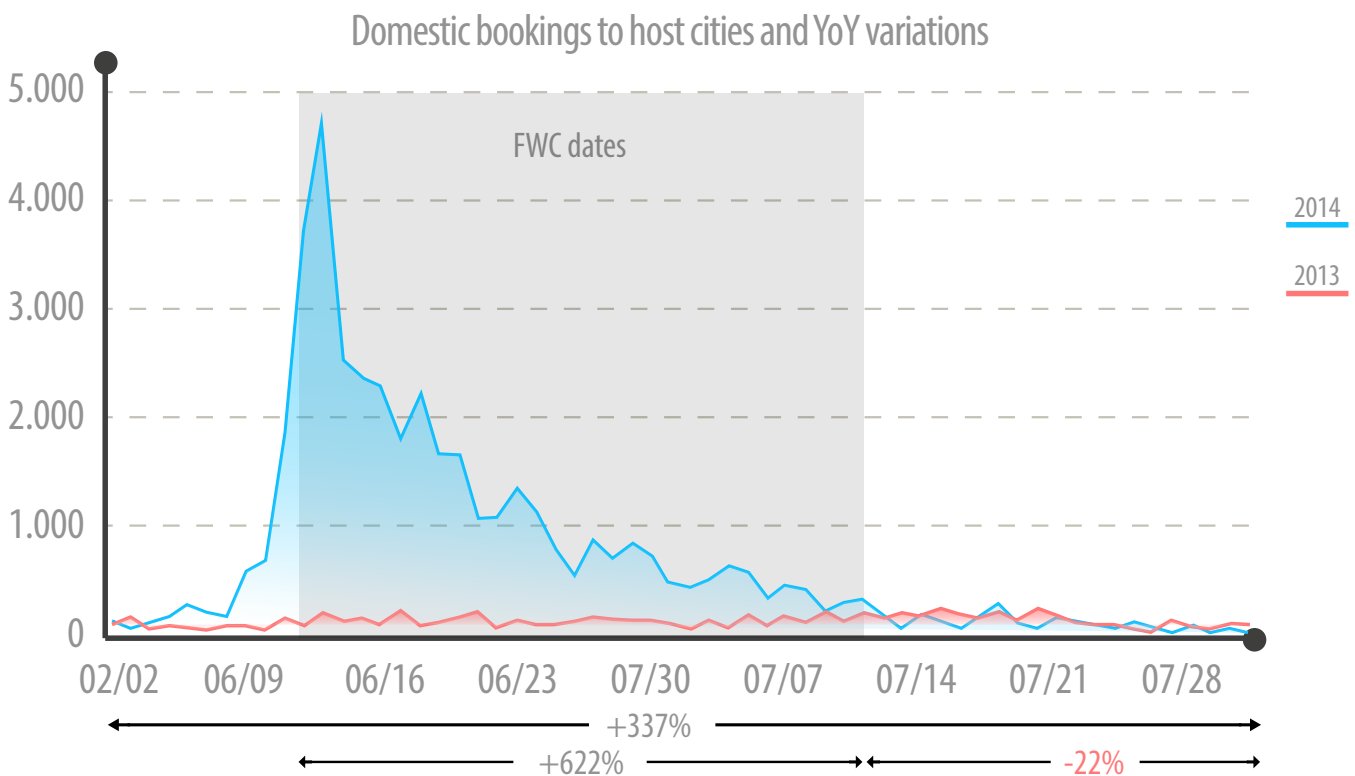
Overnights count the amount of international travelers staying each day in Brazil. During the FWC dates, overnights are multiplied by 4,8 when compared to 2013.

Clustering on the first part of the tournament, as further matches are not defined yet, overnights suffer a sharp drop after the final match.



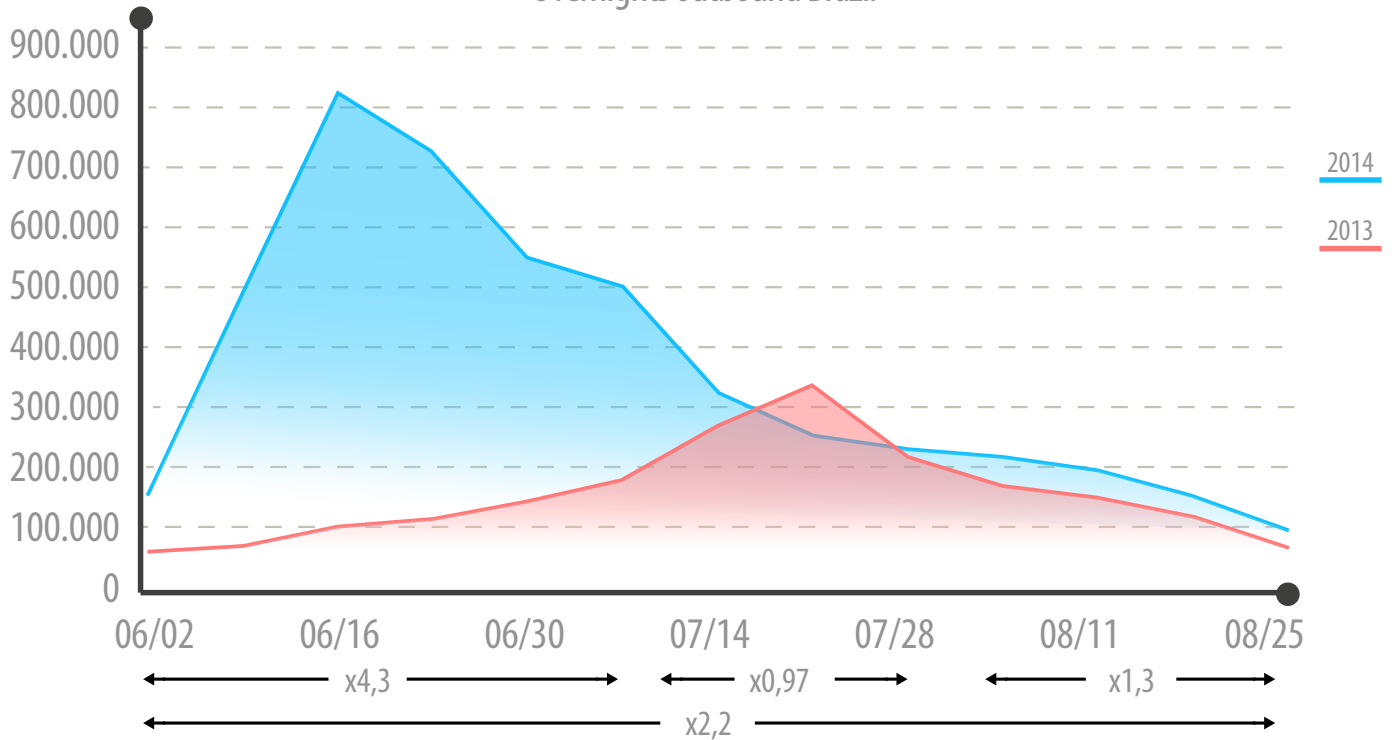


Brazilians will also visit host cities during FWC, and their bookings have increased by +622% over those dates, and although there is a big drop in bookings after the final match, the overall increase for the Jun – Jul period is +377%.



Overnights of Brazilians traveling abroad during June – July 2014 period show a shift of high season towards the month of June (from June 1st to July 7th), with an increase factor of 4,3 when compared to 2013. Only the July 14th to 28th period reflects values below those in 2013 (x 0,97).

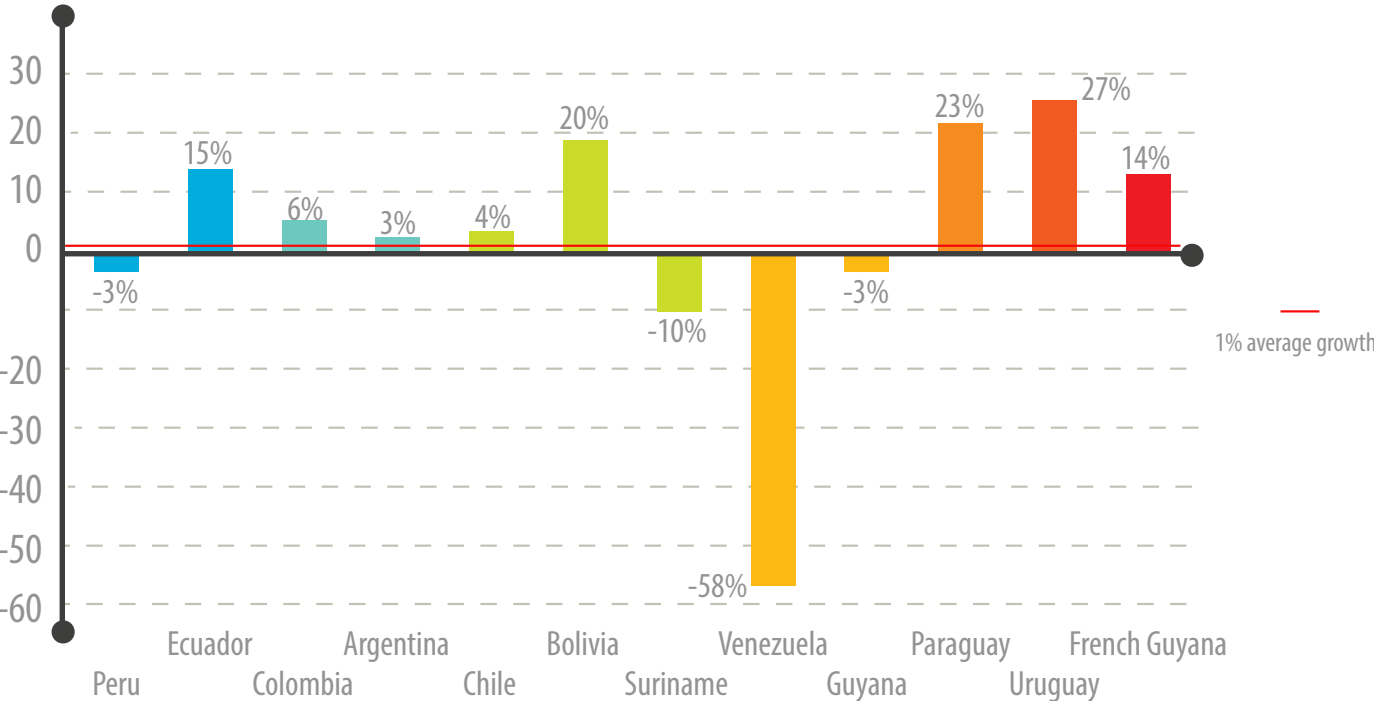
### Overnights outbound Brazil



## Inbound bookings to other South American

At 90 days from the start of FWC, bookings to other South American countries remain similar to 2013 values, with a +1% growth, which suggests that their performance in inbound tourism is neither boosted not affected by the World Cup.

Variation factor for bookings to other South American countries



### **About Forward Data**

Market Research Company Forward Data SL, a company registered in Spain, publishes [www.forwardkeys.com](http://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.

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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.

