

# ForwardKeys reveals international traveler numbers near pre-pandemic levels in Brazil

## International arrivals in Brazil in December 2023 vs 2019

(on the book as of 8 November)



Destination region	Forward Tickets 2023 vs 2019	Seat Capacity 2023 vs 2019
Sao Paulo	-1%	+2%
Rio de Janeiro	-15%	-1%
Bahia	-5%	-30%
Parana	-2%	-13%
Minas Gerais	+20%	+9%
Santa Catarina	+5%	+67%
Rio Grande do Sul	+14%	-26%
Ceara	=0%	-31%
Pernambuco	-4%	-37%
Federal District	+4%	-9%
<b>TOTAL</b>	<b>-4%</b>	<b>-1%</b>

Source: ForwardKeys Actual Air Tickets

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A study by ForwardKeys, a travel intelligence company based in Spain, indicates an increase in interest among international travelers in visiting Brazil this December.

This is regarded as excellent news for Brazil's travel industry as the country approaches the high season, nearing pre-pandemic levels of demand and international connectivity.

Overall, tickets for international tourist arrivals in December are only 4% behind 2019. However, on a regional level, the recovery is uneven due to different circumstances such as flight connectivity and the dependency on different traveler nationality source markets. The states of Minas Gerais, Rio Grande do Sul, and Santa Catarina stand out as the top regional performers, surpassing pre-pandemic levels of demand for travel in December.

## International arrivals in Brazil in Q1 2024 vs 2023 (on the book as of 8 November)



Top source markets*		Forward tickets Q1 2024 vs 2023
	Uruguay	+76%
	Germany	+43%
	Switzerland	+35%
	U.S.A.	+31%
	Italy	+28%
	Chile	+22%
	Portugal	+22%
	United Kingdom	+21%
	Argentina	+13%
	Spain	+12%

\*Markets with a share > 2% of total arrivals

Source: ForwardKeys Actual Air Tickets

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Minas Gerais, Rio Grande Do Sul, and Santa Catarina stand out as the top regional performers

The report indicates a strong demand despite the limited international flight connectivity to some states. Seat capacity for international flights has finally reached pre-pandemic levels in Q4, but the re-establishment of international connections is uneven across the states. ForwardKeys noted this situation creates a dependency on gateway airports such as Sao Paulo.

It also shows the growth potential is higher, provided that the flight connectivity reaches adequate levels. Insufficient connectivity could drive airfares up and put off travelers during the popular high season.

### Q1 Outlook for Brazil - Strong long-haul market interest

The travel demand is still strong into the first quarter of 2024, particularly from long-haul markets. Travelers from Germany, Switzerland and Italy will play a crucial role in keeping the tourism sector busy next year. The outlook is also very promising for regional markets like Uruguay, Chile, and Argentina.

Looking ahead to key events in the tourism calendar, ForwardKeys' Flight Search data reveals the Carnival in Rio de Janeiro in February has a strong appeal for international travelers. The US, France, Portugal, the United Kingdom, Germany, and Spain are the markets most interested in visiting this event - a crucial insight for other destinations wanting to promote their "Brazilian carnival experience" among international audiences.

The uneven recovery of Brazil's inbound tourism highlights the importance of travel intelligence going beyond the "big picture." Granular data can help tourism operators and organizations delve deeper into their local and regional challenges and tap into the right traveller audiences at the right time.