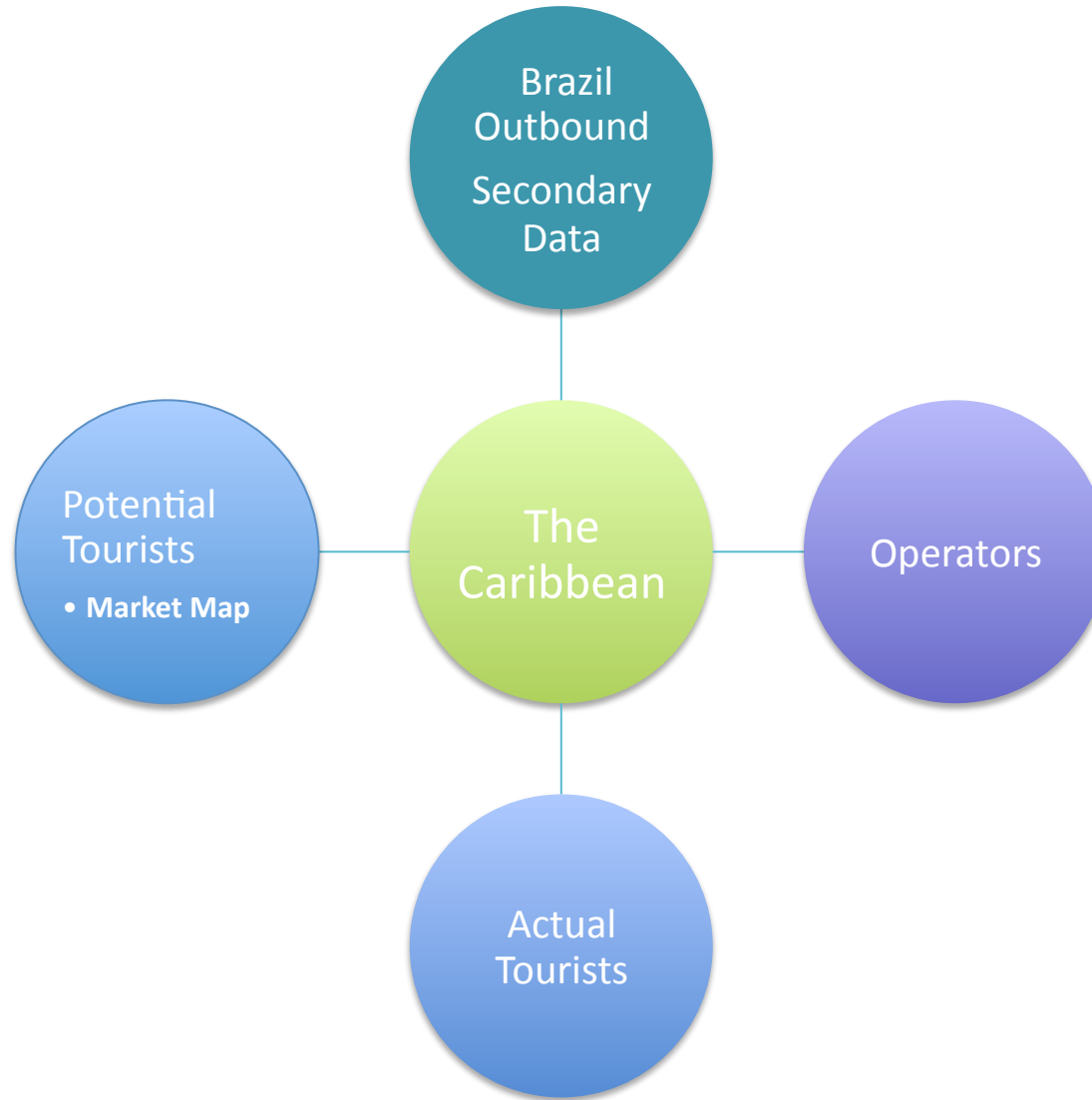


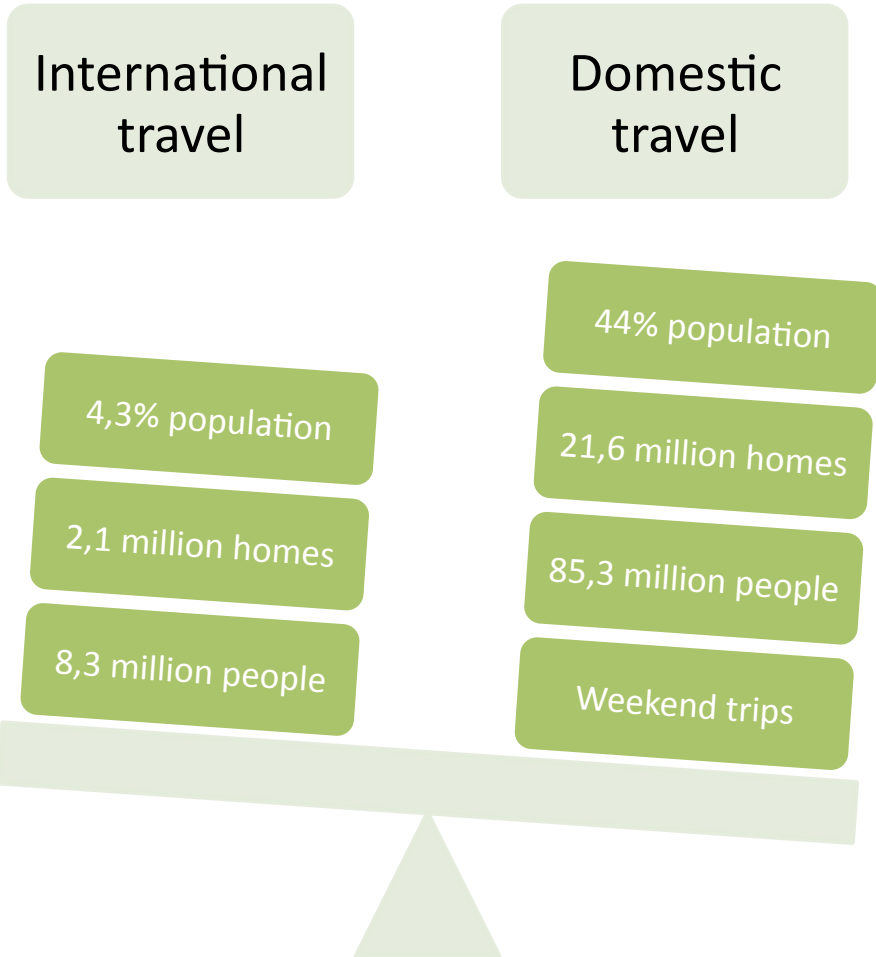


**FGV PROJETOS**

**Brazilian outbound market:  
The Caribbean**

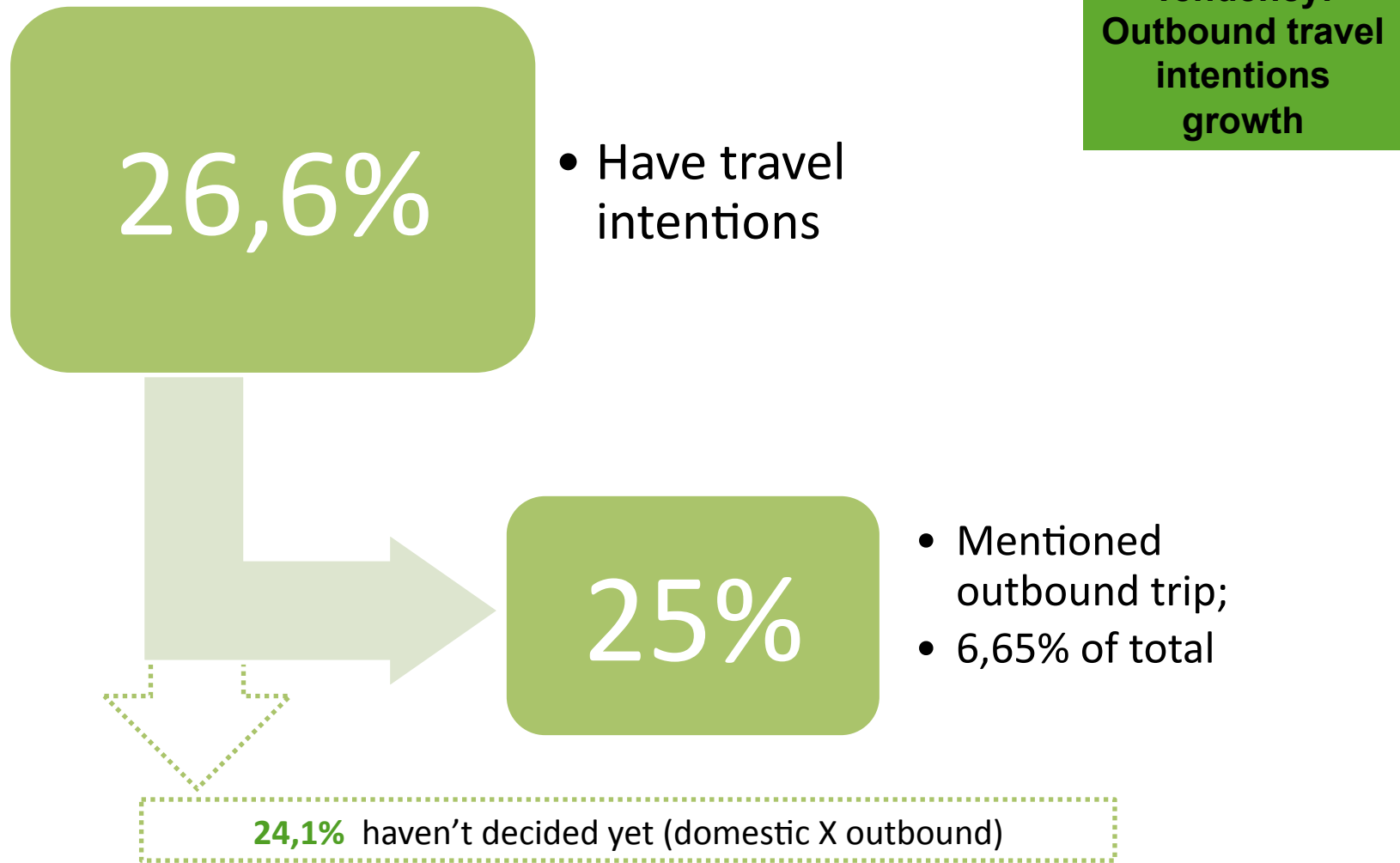


# Brazilian tourist demand

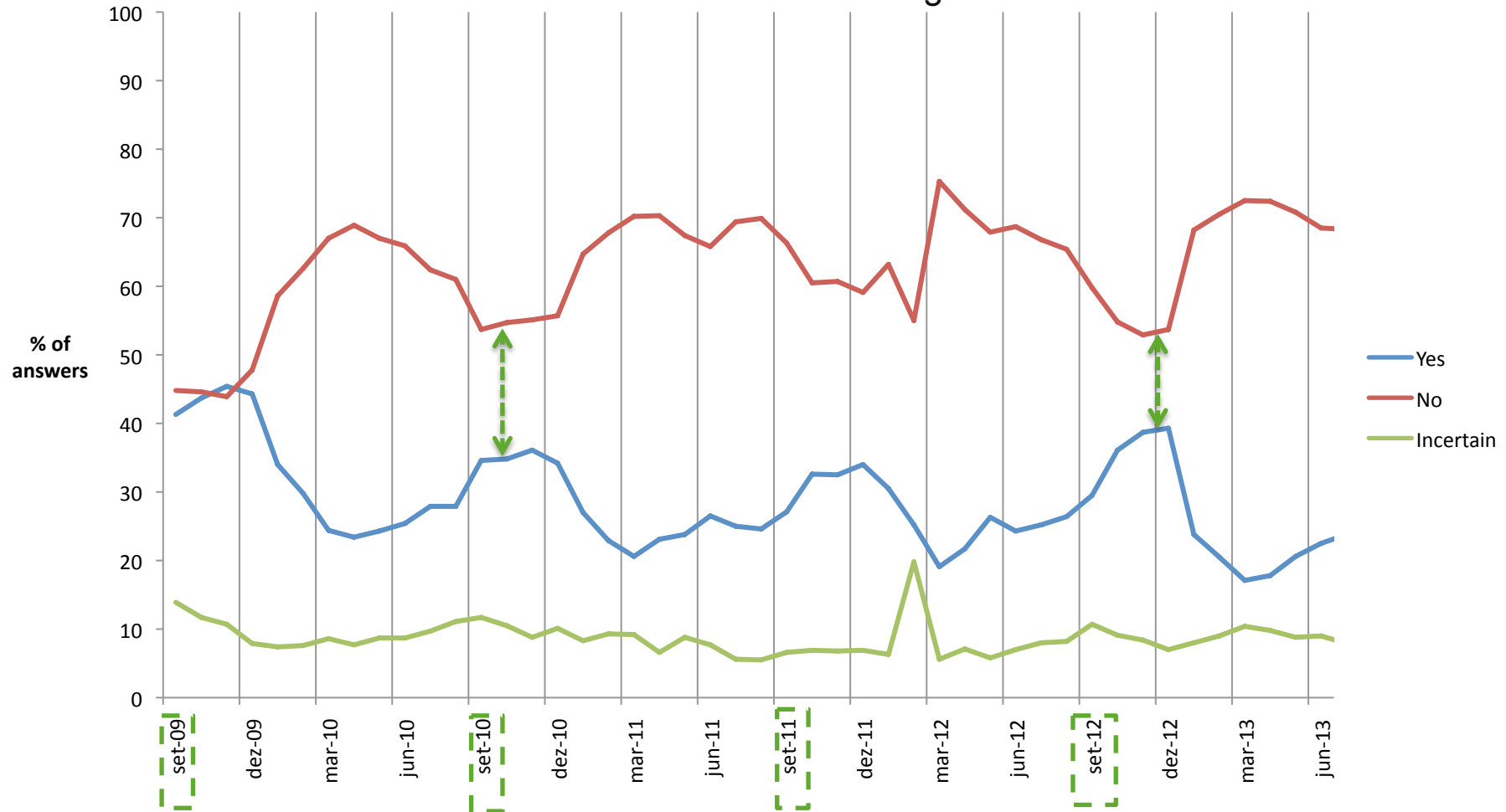


Source: Brazilian Ministry of Tourism, 2012.

*Travel intentions for the next 6 months*



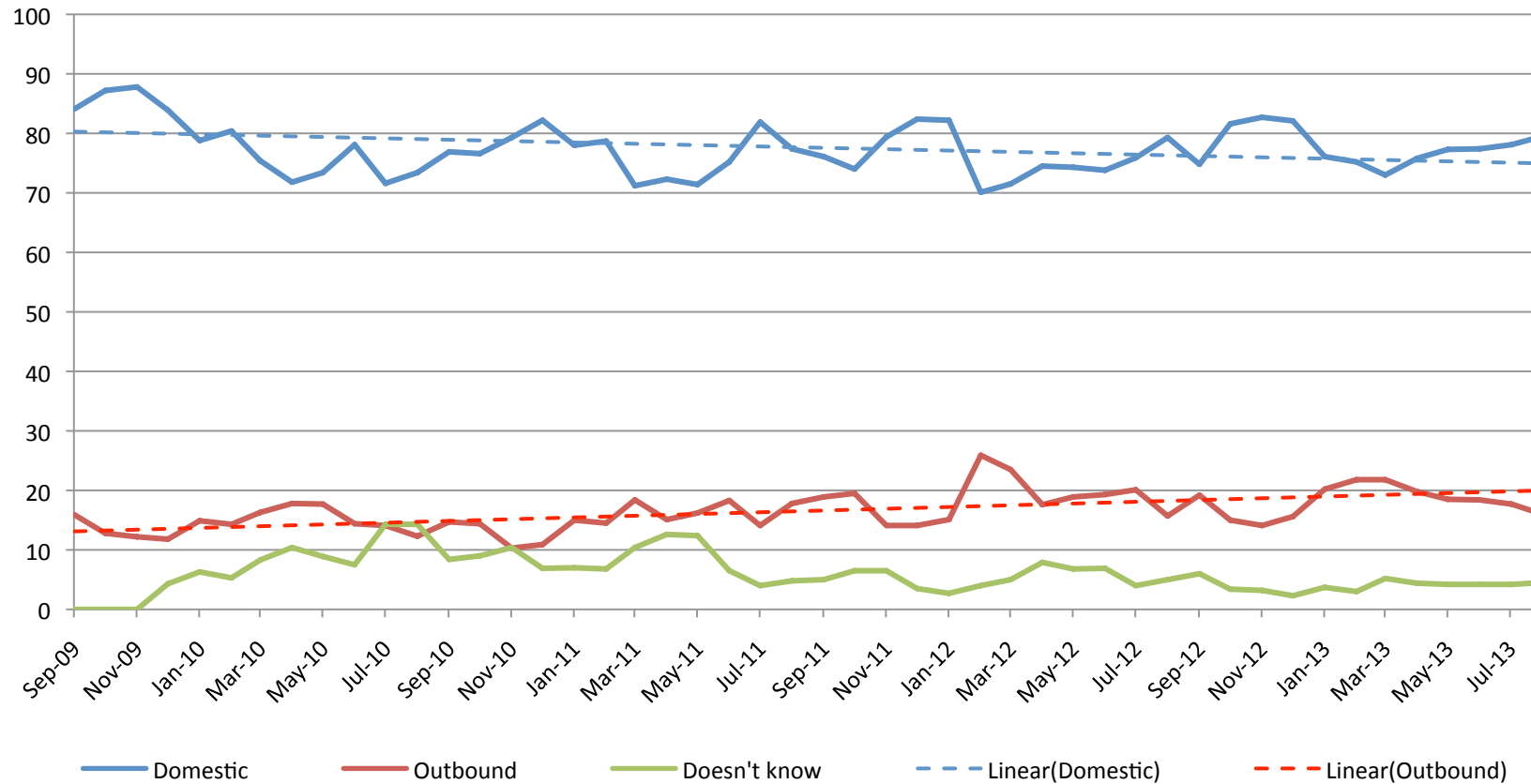
Travel intentions for the following 6 months



**South Hemisphere's Spring is the planning season: positive travel intention**

Source: Brazilian Ministry of Tourism

# Travel intention



**Positive international travel intention**

Source: Brazilian Ministry of Tourism, 2013

*To the average Brazilian, the Caribbean means...*



---

*Brazilians buying trips to the Caribbean seek for...*

**BEACHES**  
SOPHISTICATION  
**ALL INCLUSIVE**  
**OUTSTANDING NATURAL BEAUTY**  
SHOPPING  
**COST BENEFIT**  
COMFORT



*Main Brazilian interests in the Caribbean are...*

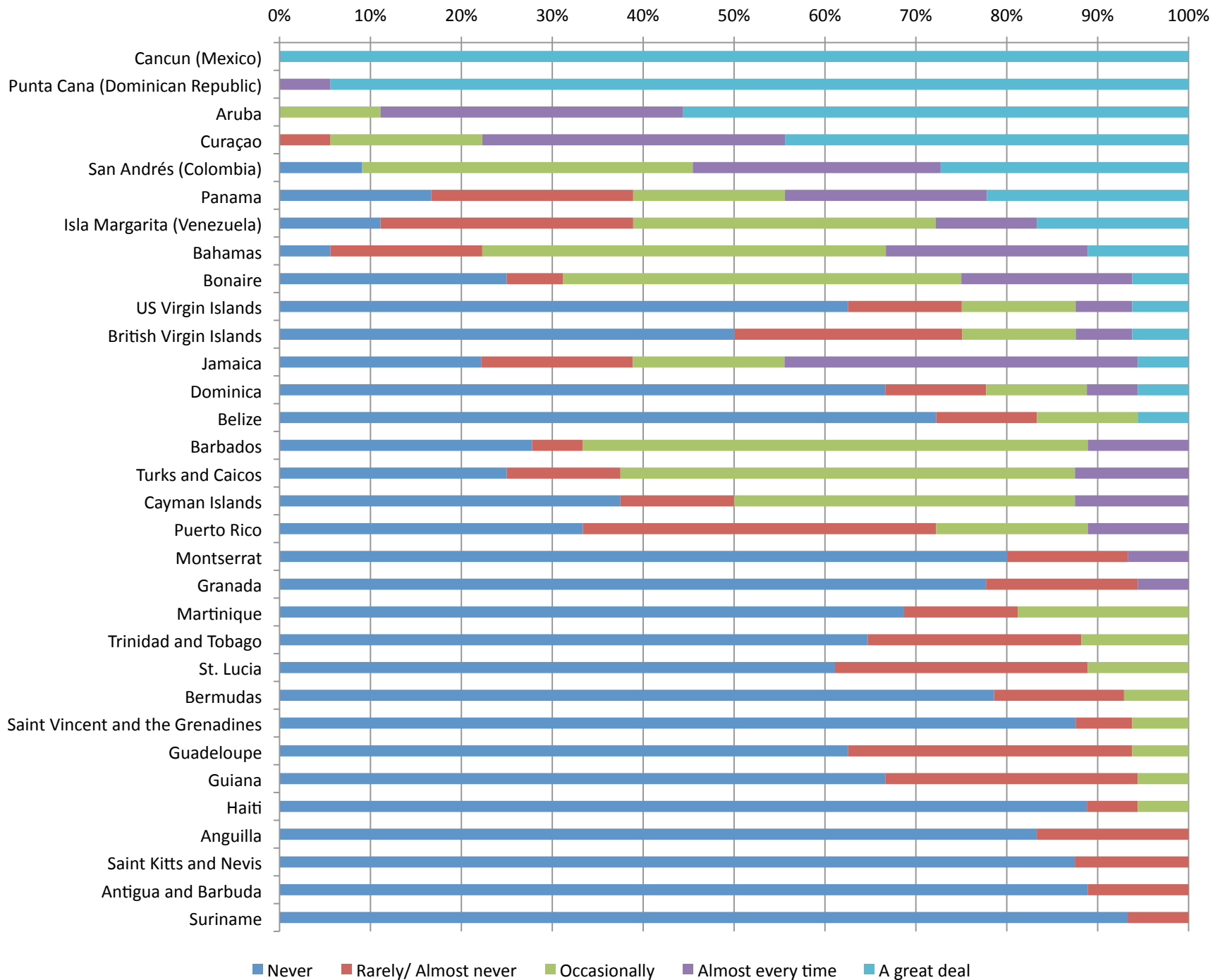
# BEACH



A word cloud of leisure activities. The words are arranged in a cluster, with 'SHOPPING' being the largest and most central. Other words include 'RESORT', 'CULTURE', 'LEISURE', 'DIVING', 'SURF', 'HONEYMOON', and 'CRUISE'.

DIVING, SURF, HONEYMOON, CRUISE, SHOPPING, RESORT, CULTURE, LEISURE

# Operators – most wanted destinations (hot searches)



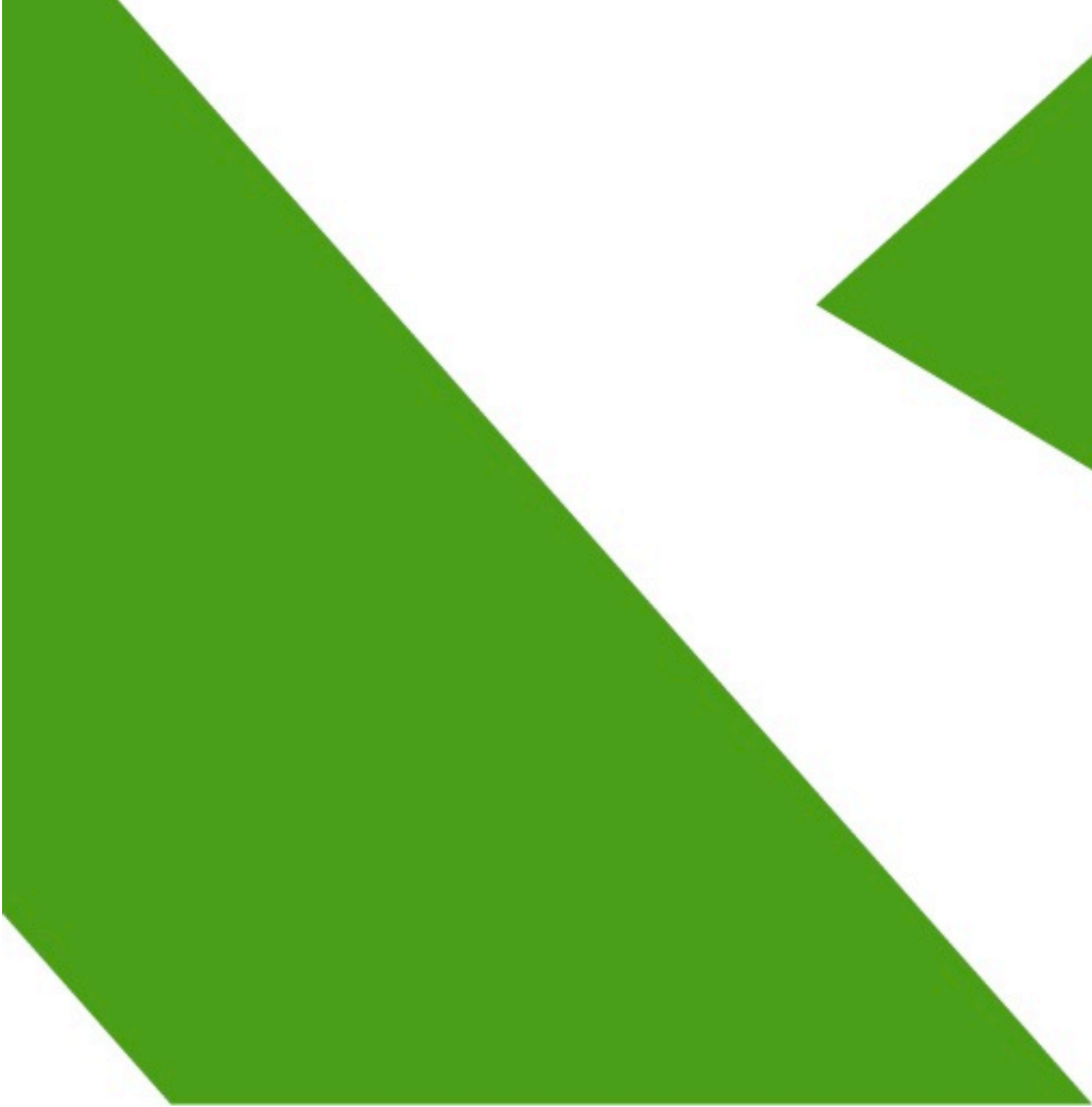
Operators' opinion



*Reasons to be the most wanted ...*

# MARKETING

ACCESS ENTERTAINMENT  
BEACH ALL INCLUSIVE  
TREND COST BENEFIT SHOPPING WORD OF MOUTH  
CULTURE



**Actual Demand**

## Questionnaire's Filters

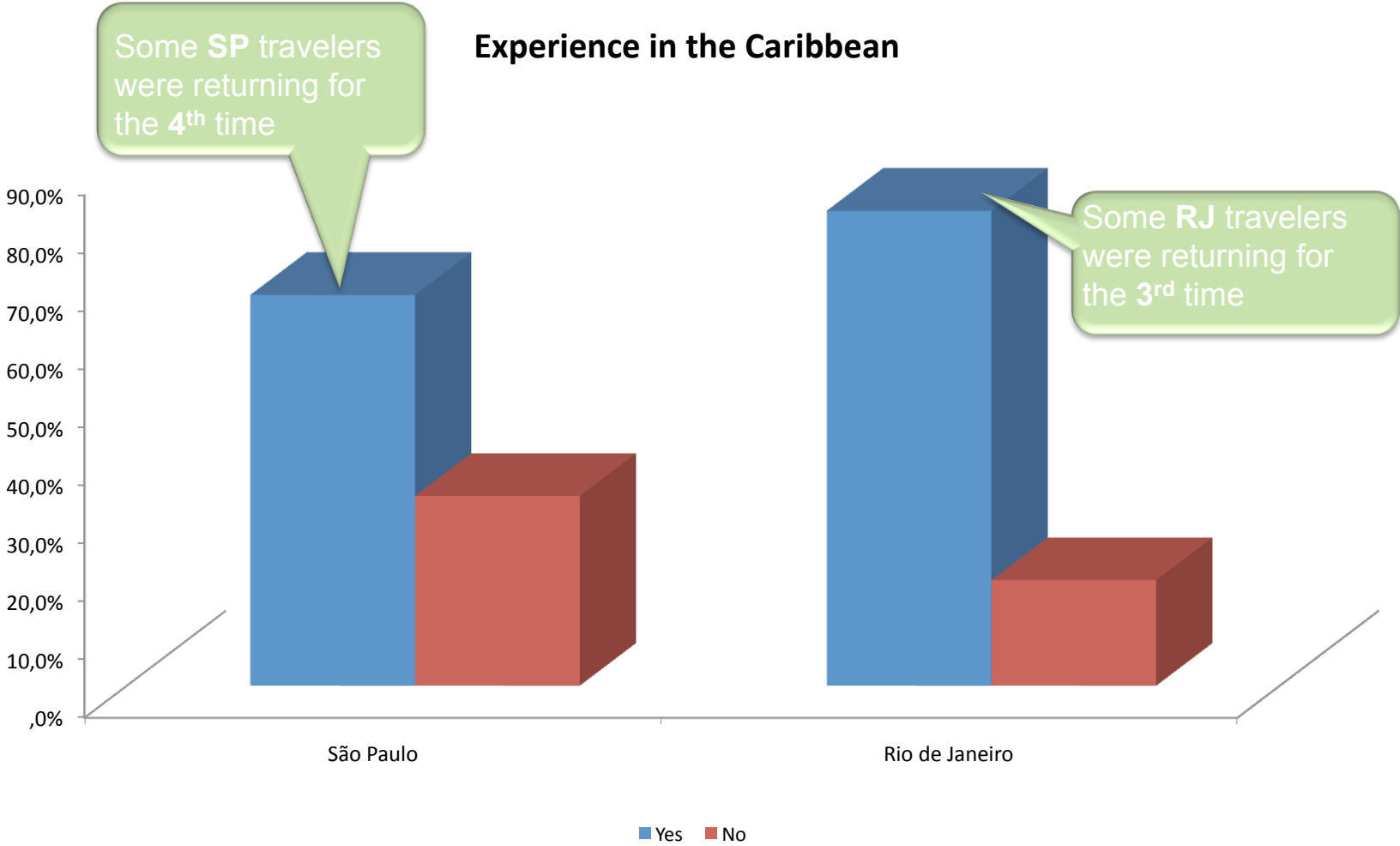


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1: Resident in Brazil

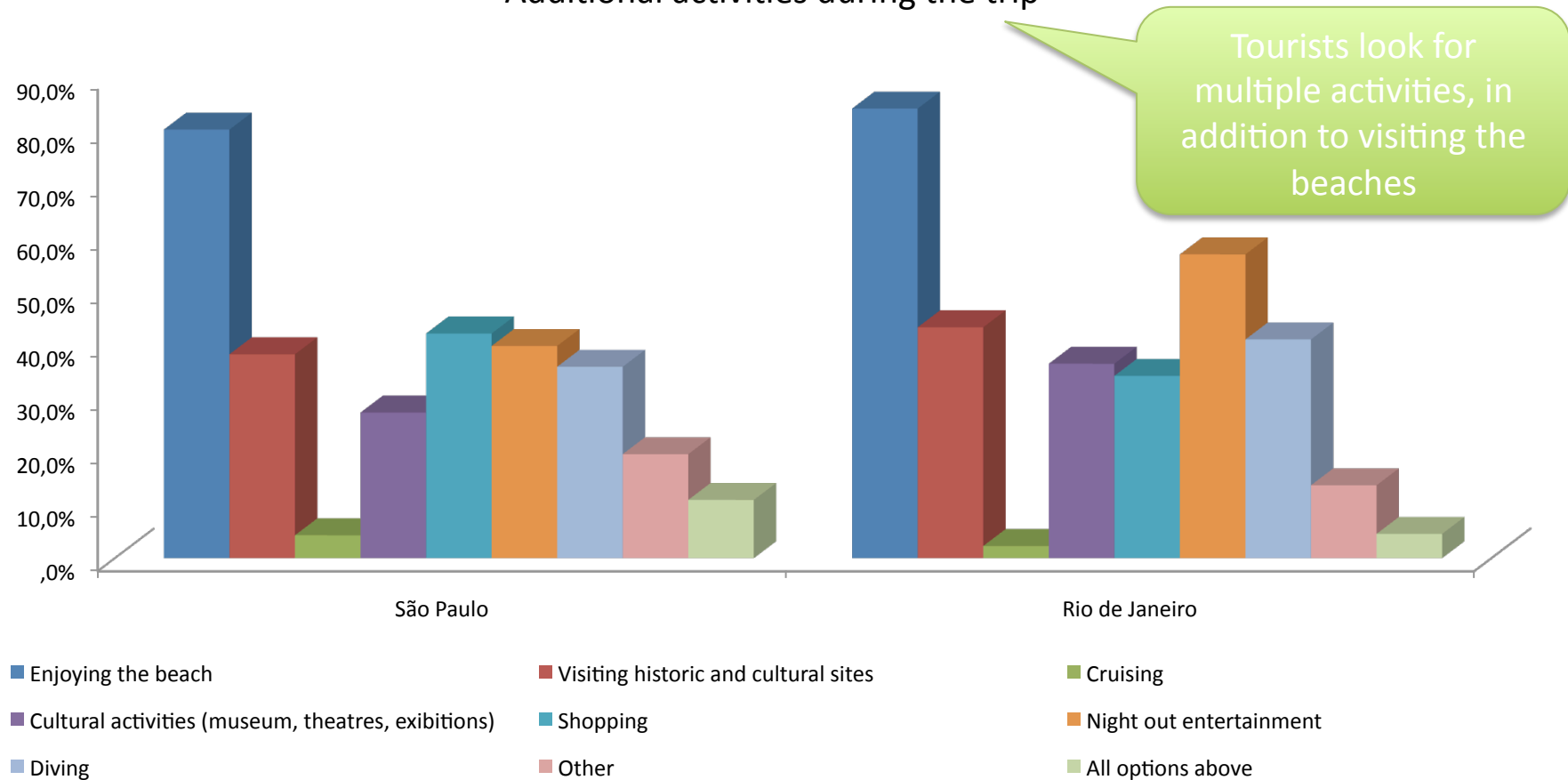
2: Travelling to the Caribbean

3: Leisure as the main reason for this trip



1. Is this your first time in the Caribbean ?

Additional activities during the trip



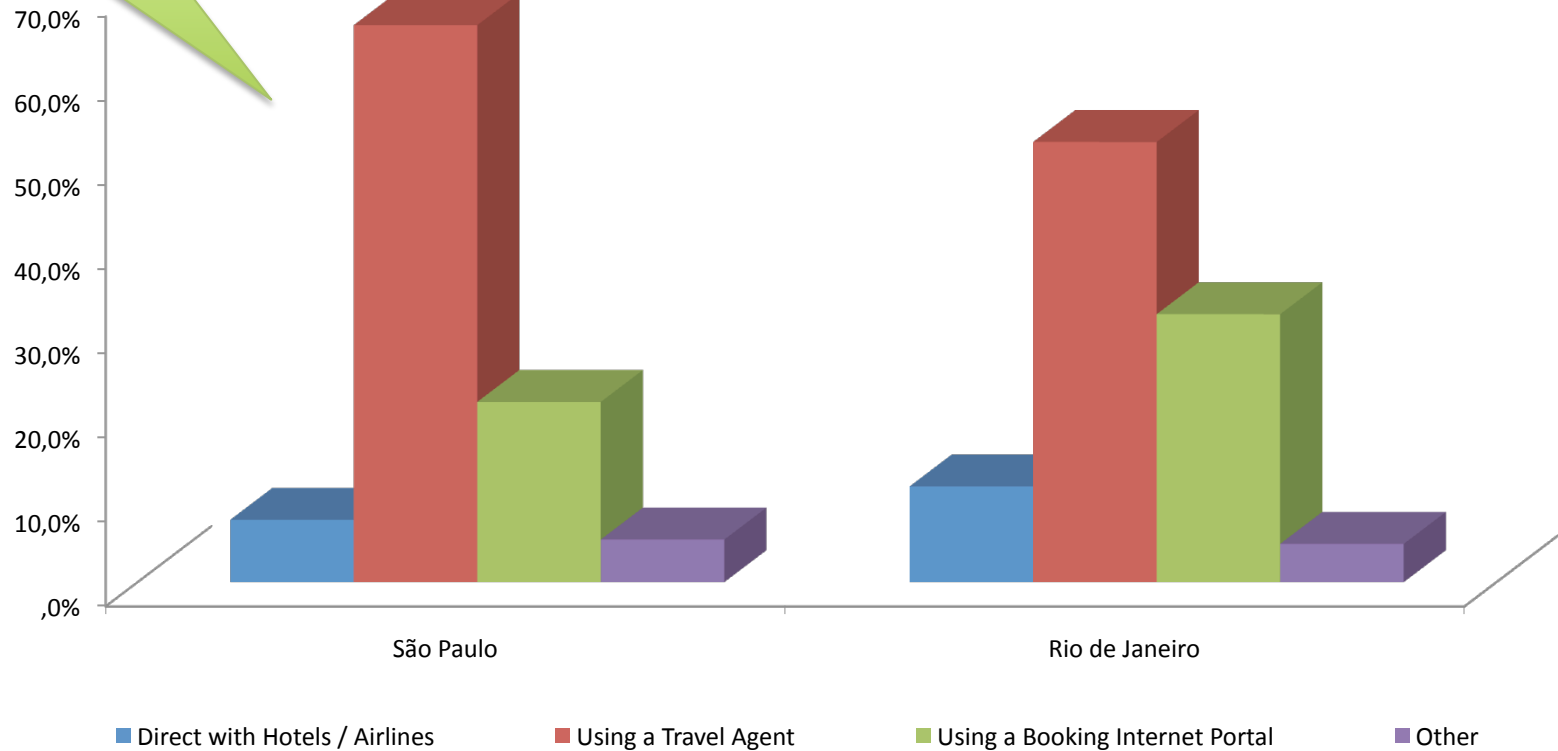
9. Which activities do you intend to perform in this trip ?

# Actual Demand



Talking to someone still matters

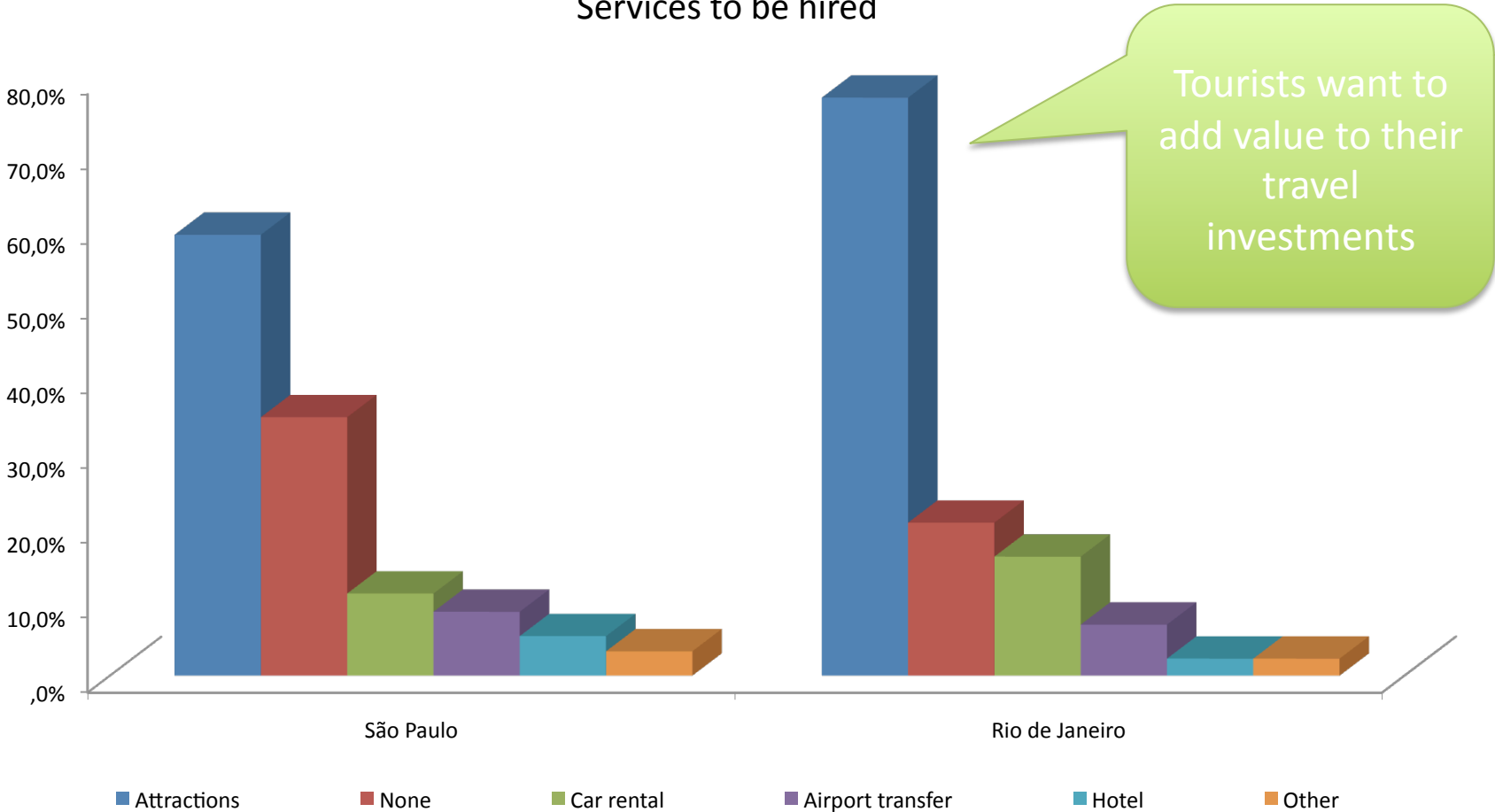
## Trip organization



10. How do you organize your trip ?

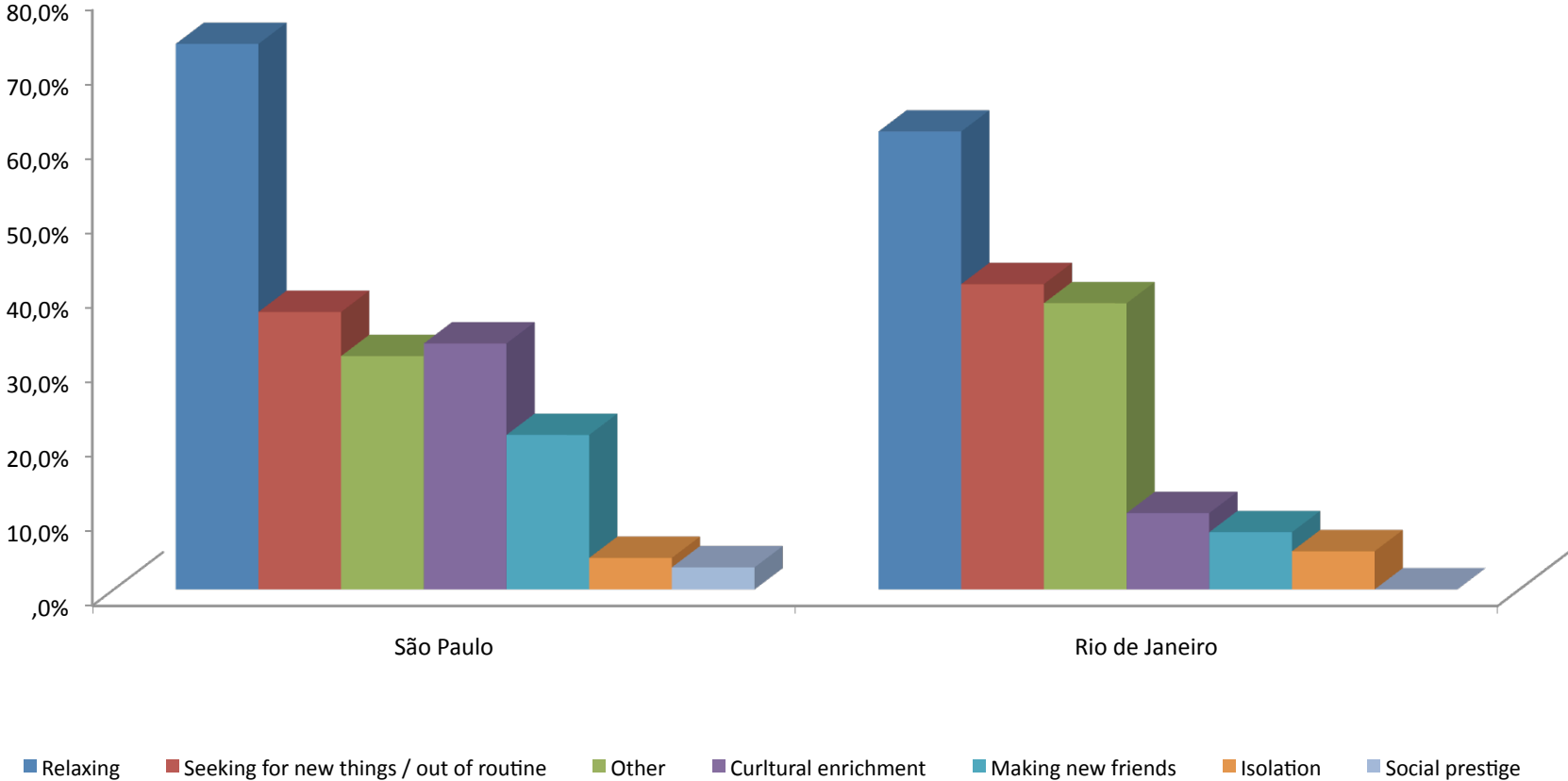


Services to be hired



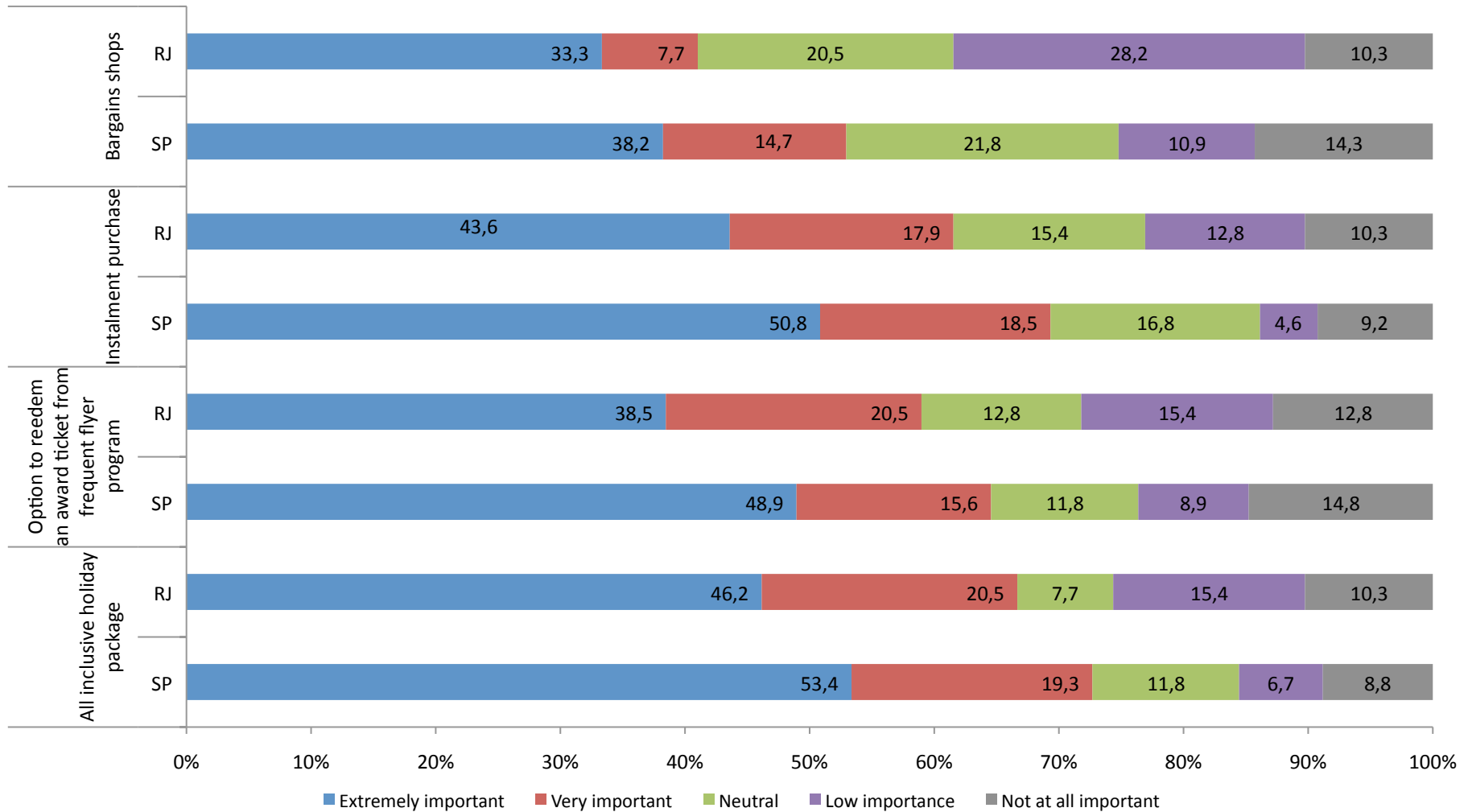
11. What services do you intend to hire directly in the destination ?

Main reason for a leisure travel?



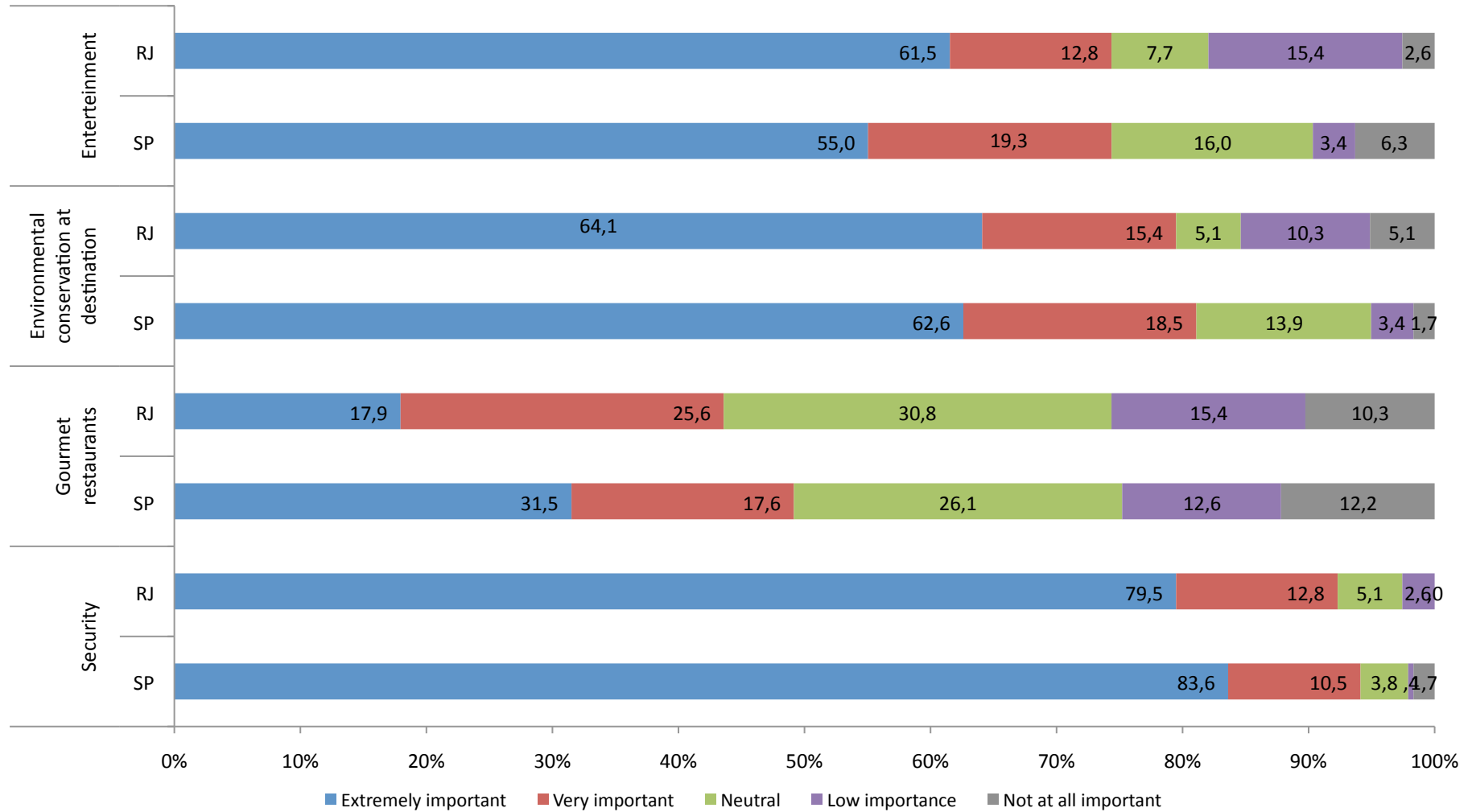
12. What made you decide for a leisure travel ?

Influence Factors for travelling



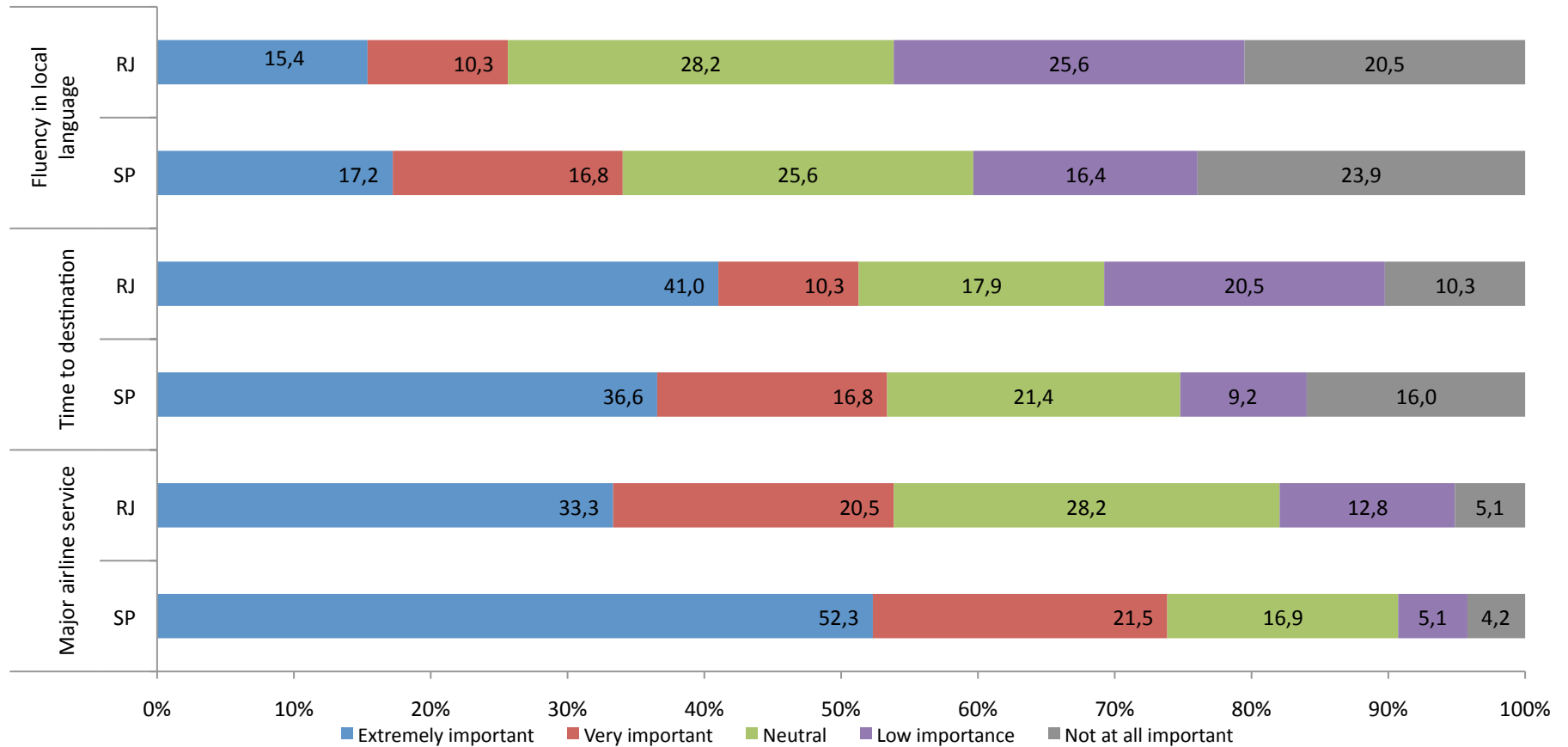
13. Please evaluate the relevance of the following conditions in your travel

Influence Factors for travelling



13. Please evaluate the relevance of the following conditions in your travel

Influence Factors for travelling



13. Please evaluate the relevance of the following conditions in your travel

Actual Demand: First THOUGHT  
related to the Caribbean



# BEACH

SP

SUN  
SEA CANCUN  
NATURE NATURAL BEAUTY  
BLUE SEA

PARTY

HEAVEN

RJ

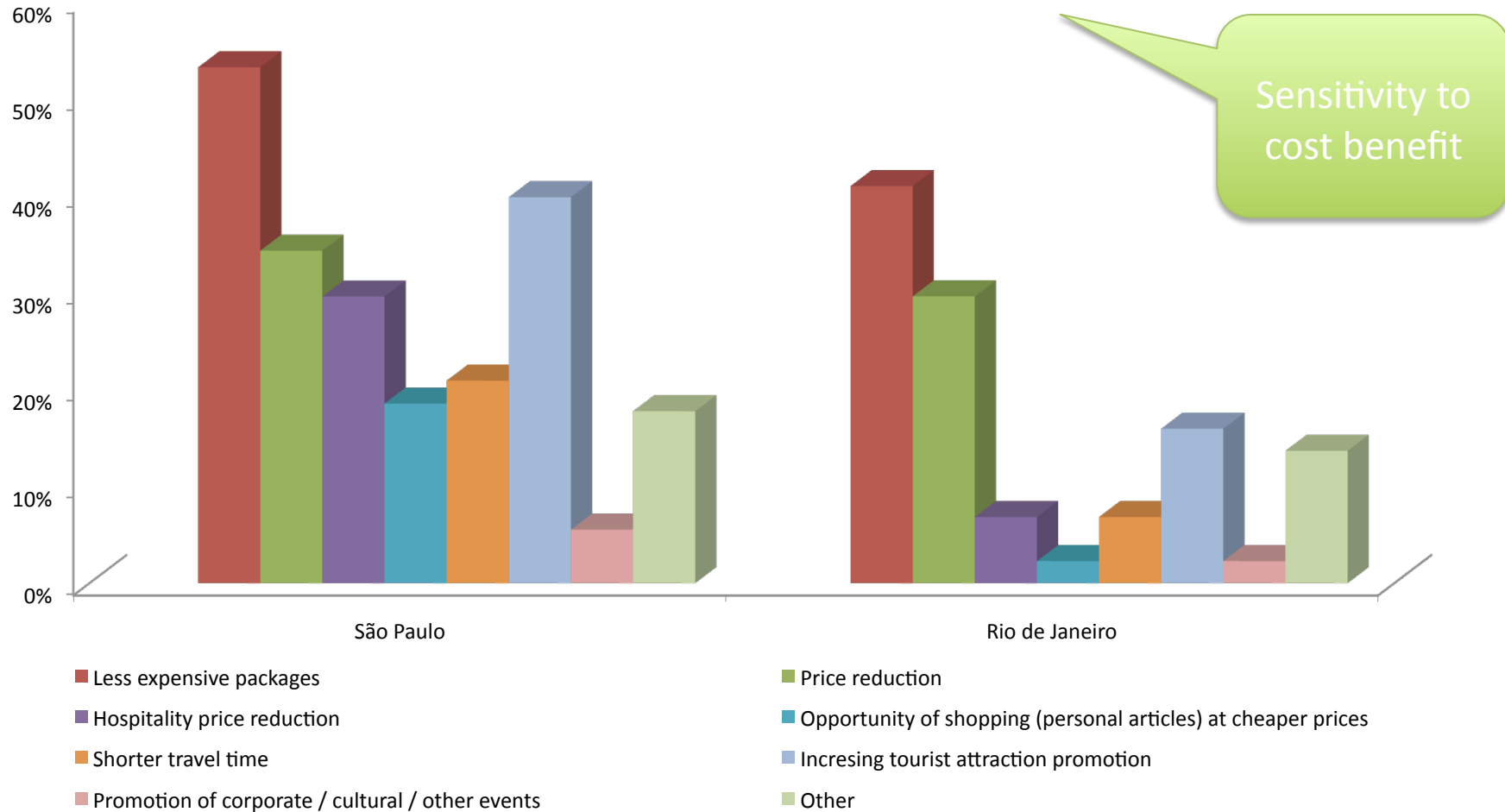
# BEACH

SEA PERFECT SEA SUN CUBA  
SALSA LEISURE RELAXATION FUN BLUE SEA

HAPPINESS NATURAL BEAUTY  
DIVING HEAVEN

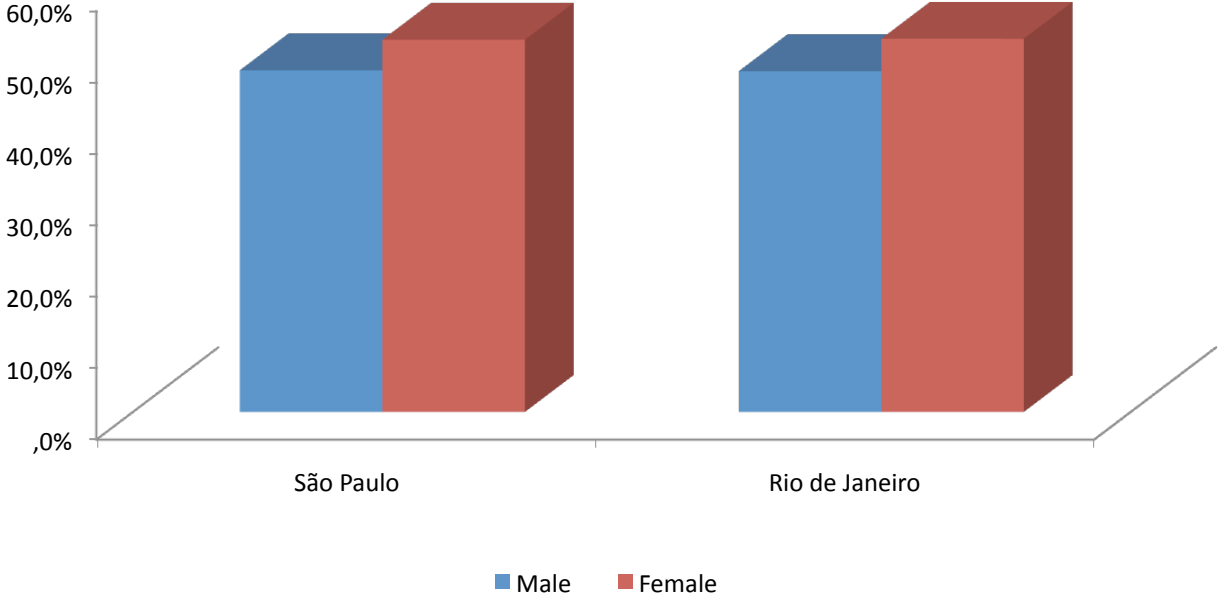
17. When thinking about the Caribbean, what is the first thing that comes to your mind ?

### How to increase attractiveness for Bahamas, Barbados, Jamaica or Trinidad and Tobago



20. What could be offered in order to make your next leisure destination Bahamas, Barbados, Jamaica or Trinidad and Tobago ?

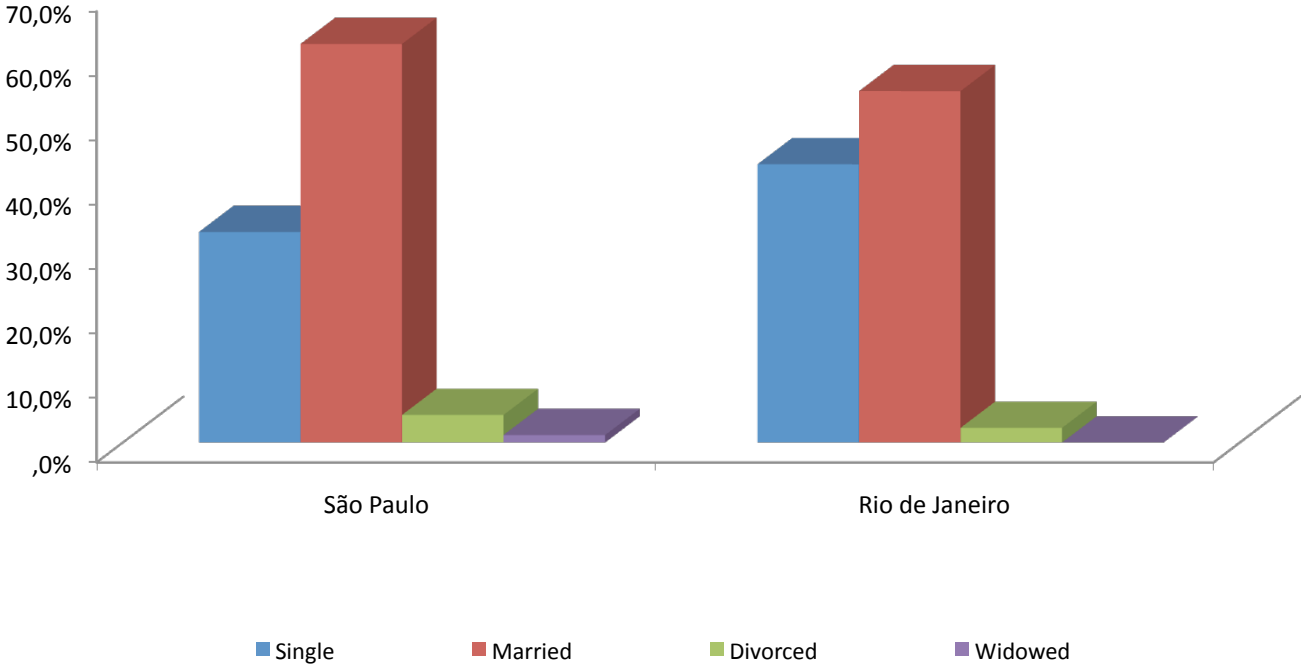
### Gender



25. What is your Gender?

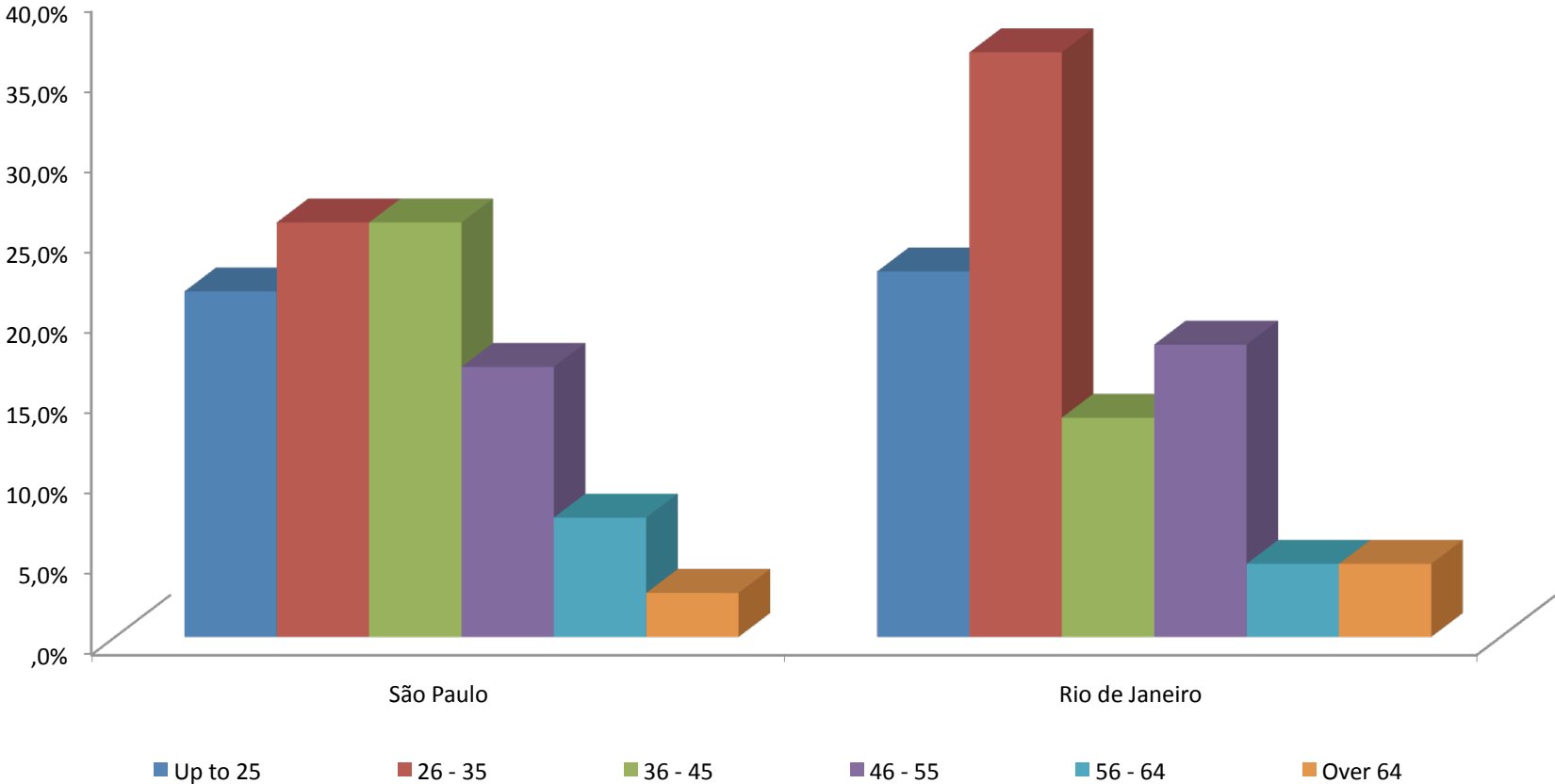


### Marital status



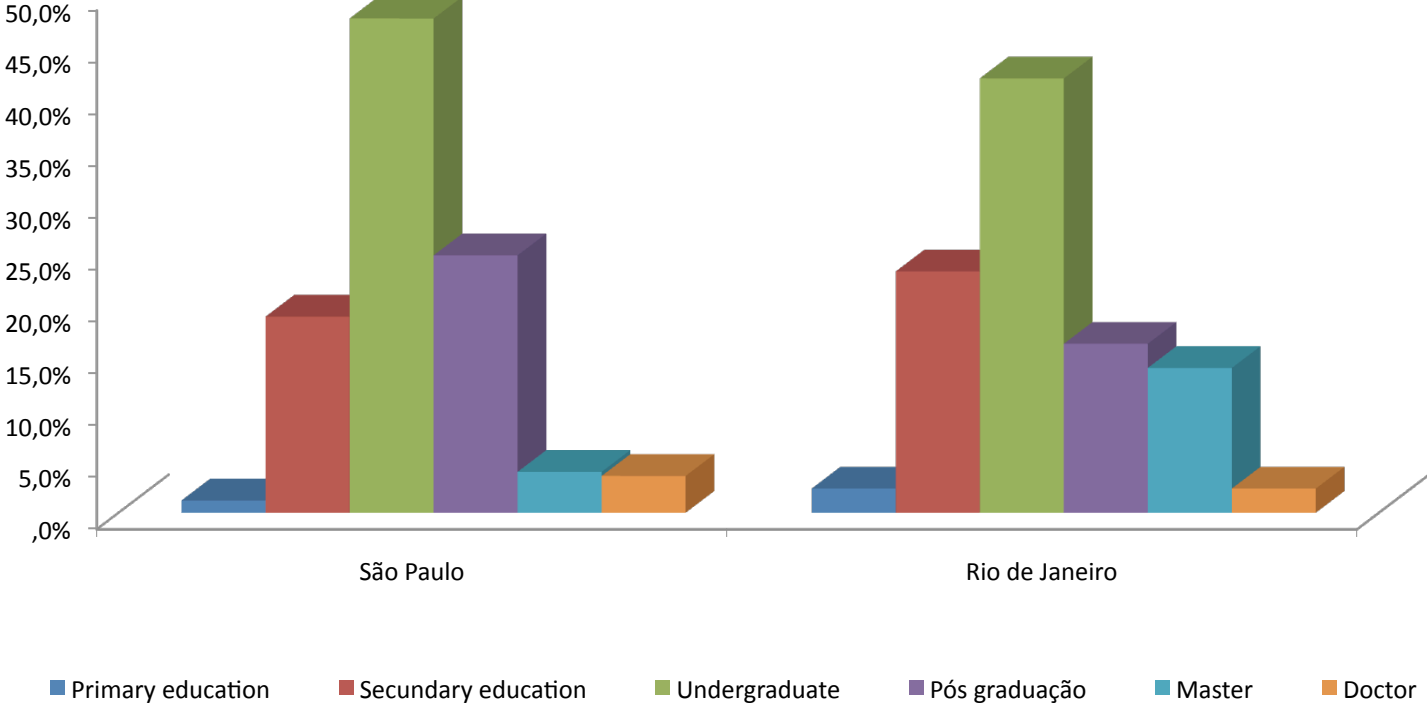
26. What is your marital status ?

Age



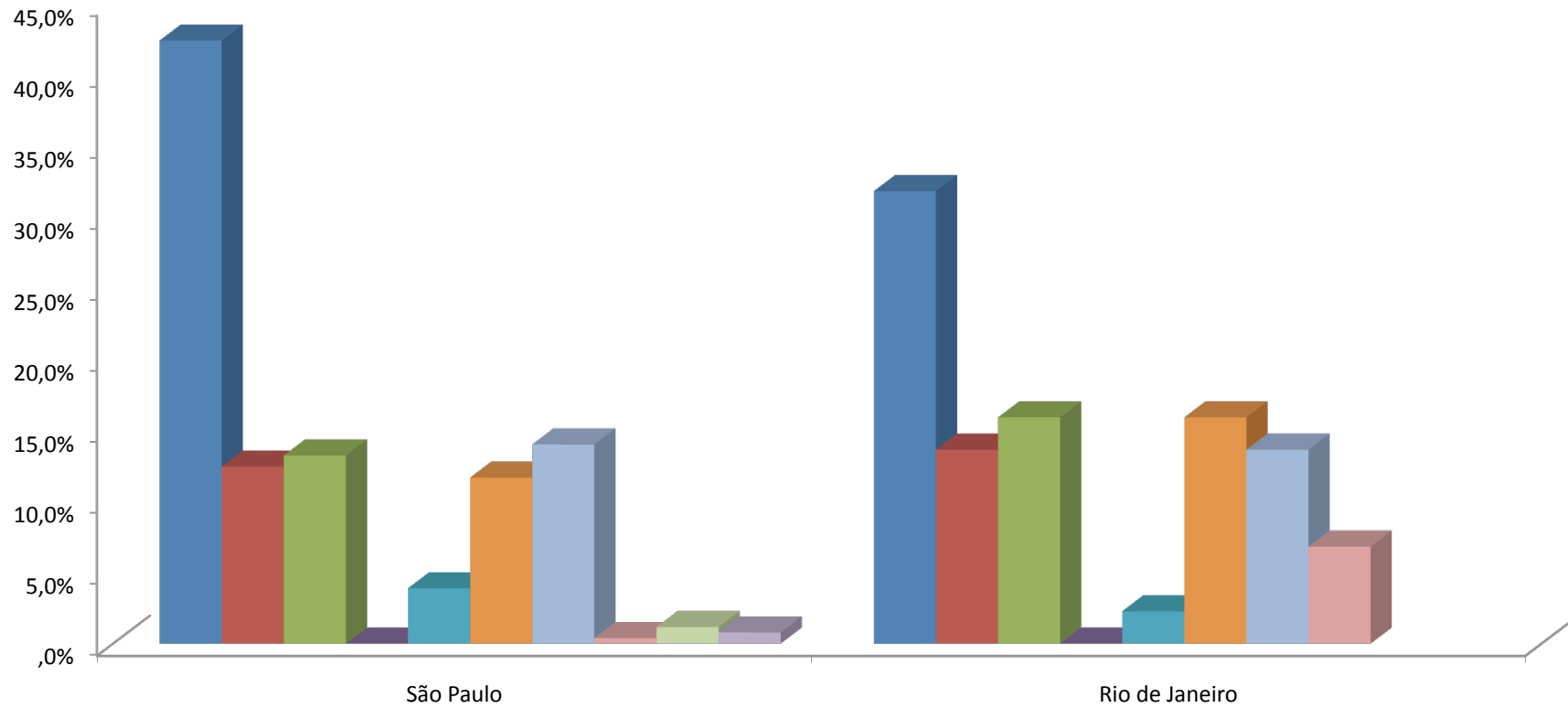
27. What is your age ?

### Education level



28. What is your highest degree ?

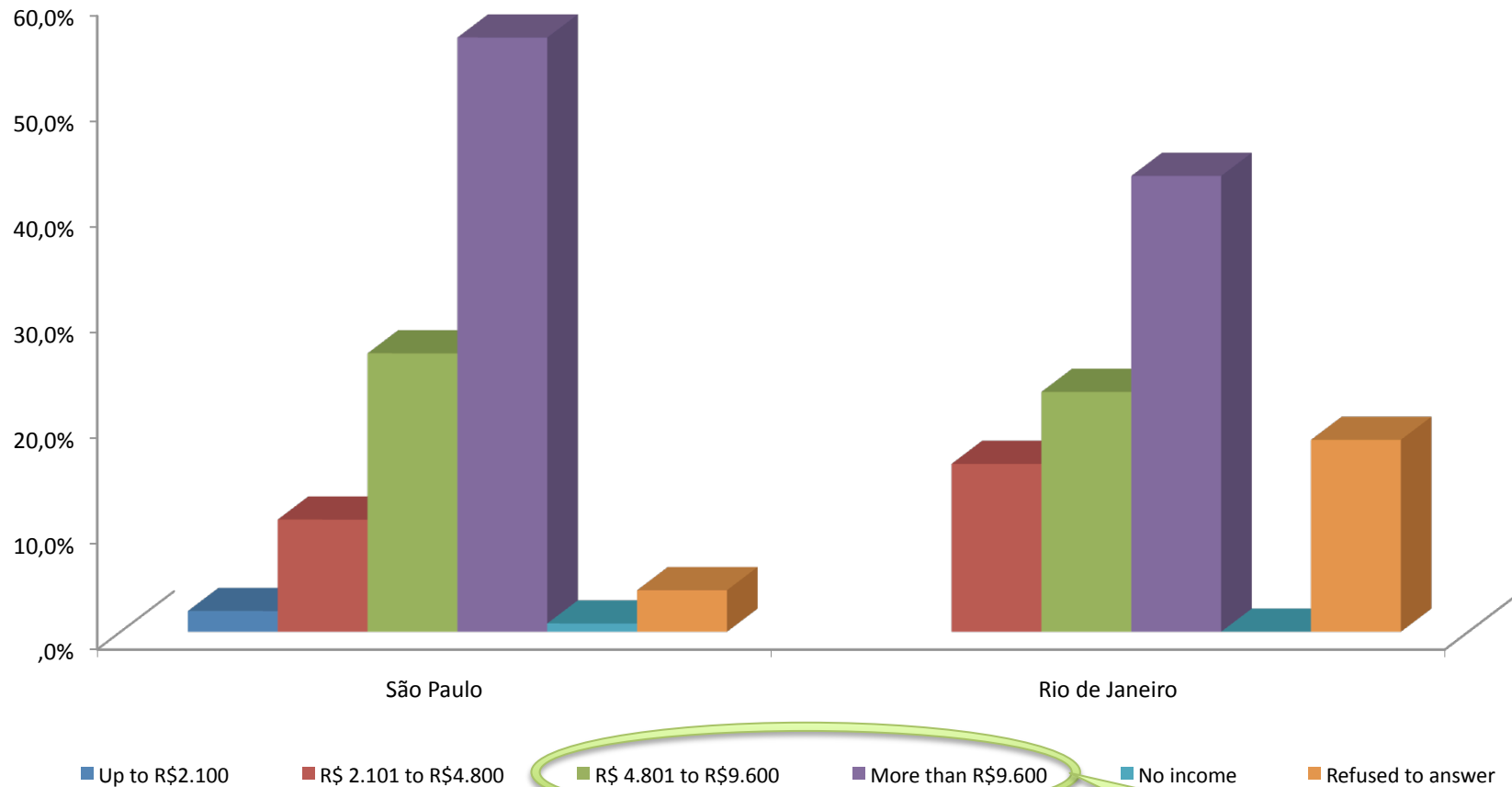
### Employment



- Employee at private sector
- Employee at public sector
- Self-employed
- Informal market
- Retired
- Student
- Entrepreneur
- Housewife
- Unemployed
- Other

29. What is your main occupation ?

Family income (R\$ per month)



Higher income classes  
(+ US\$4.800,00 per month)

30. What is your family income (in R\$, per month) ?



**Market Map**

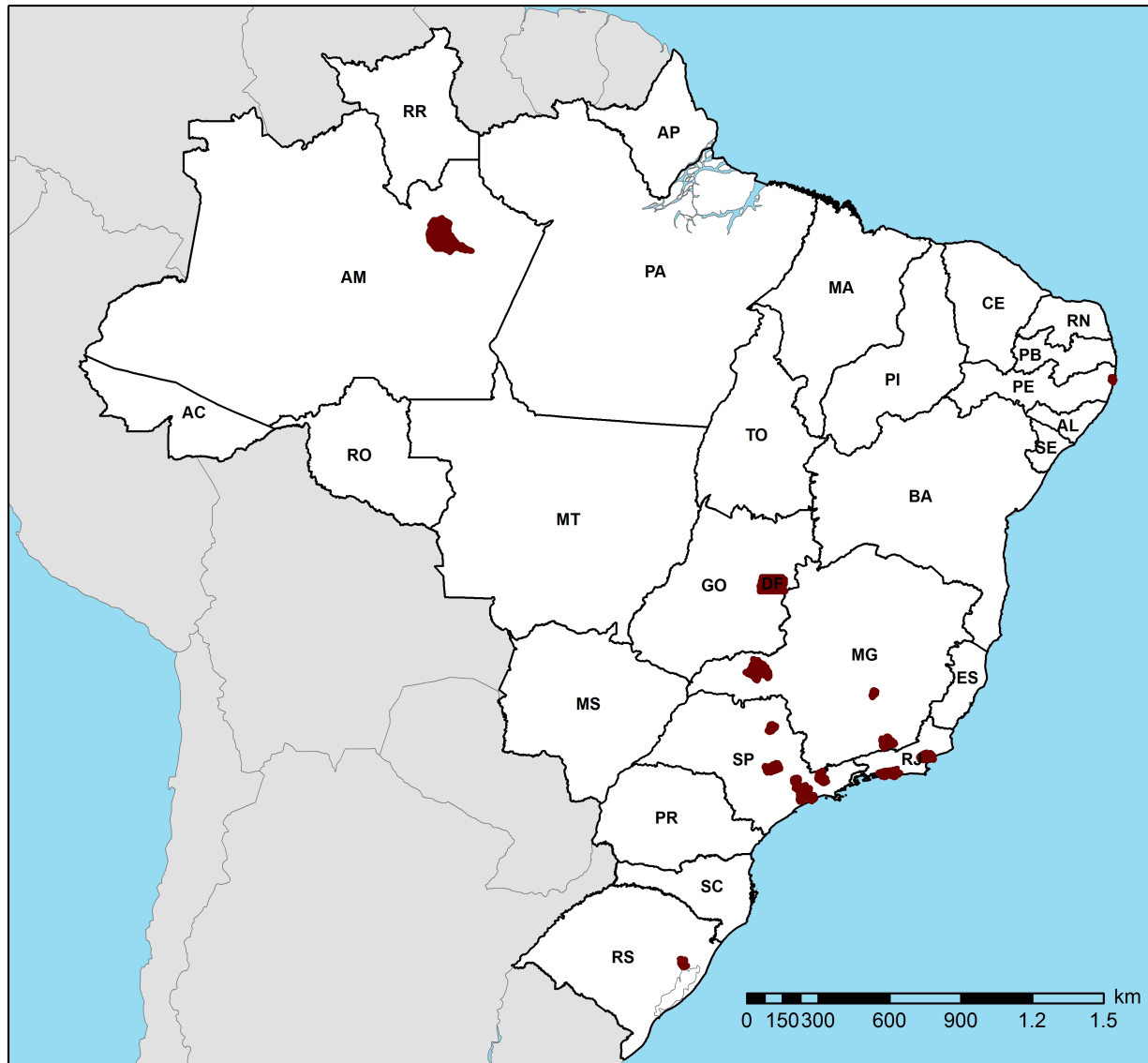
## Modeling factors



	MODELING FACTORS		CITIES	POPULATION
F1	Logistic	Cities and Brazilian UF (Federation Units) with airports where one may fly to the Caribbean (1 connection)	2.336	102.096.719
F2	Demographic	Cities with more than 200 thousand people and household income higher than Brazilian Average	44	41.739.927
		Cities with 50 to 200 thousand people and household income higher than Brazilian Average	2	
F3	Market	Cities scoring over 1 at Reilly's Law <sup>(1)</sup>	37	39.019.571
F4	Economic	Family income over 15 minimum wages (Per month)	20	2.273.465

<sup>(1)</sup> larger cities will have larger spheres of influence than smaller ones.

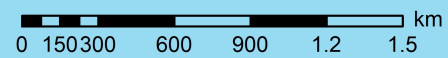
# Model results: target destinations for Potential Tourist Research



State/City
<b>Amazonas - AM</b>
Manaus
<b>Minas Gerais - MG</b>
Belo Horizonte
Juiz de Fora
Uberlândia
<b>Pernanbuco - PE</b>
Recife
<b>Rio de Janeiro - RJ</b>
Macaé
Niterói
Rio de Janeiro
<b>Rio Grande do Sul - RS</b>
Porto Alegre
<b>São Paulo - SP</b>
Barueri
Jundiaí
Osasco
Piracicaba
Ribeirão Preto
Santo André
Santos
São Caetano do Sul
São José dos Campos
São Paulo
<b>Distrito Fedral - DF</b>
Brasília

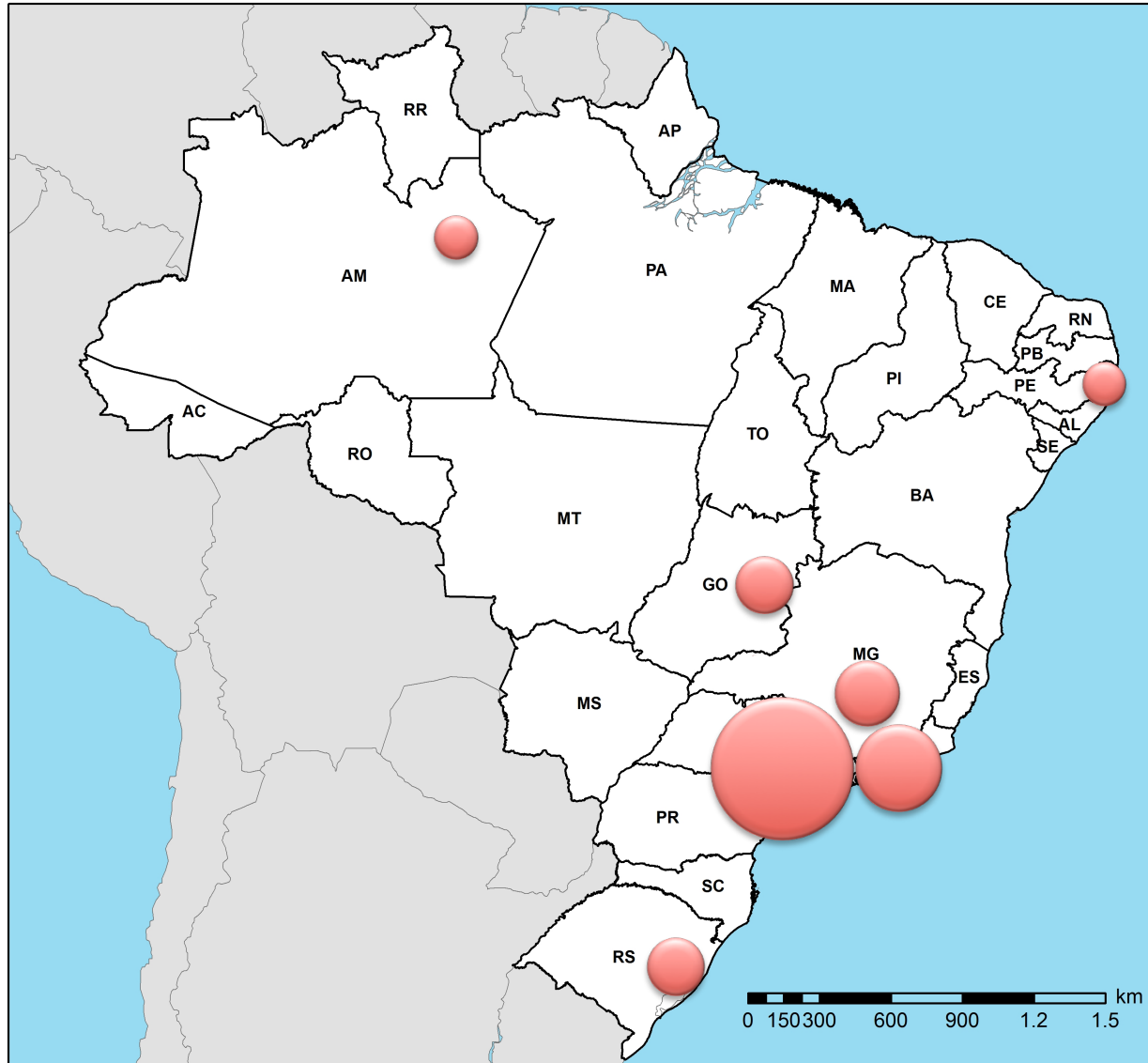
### Legend

■ Select City



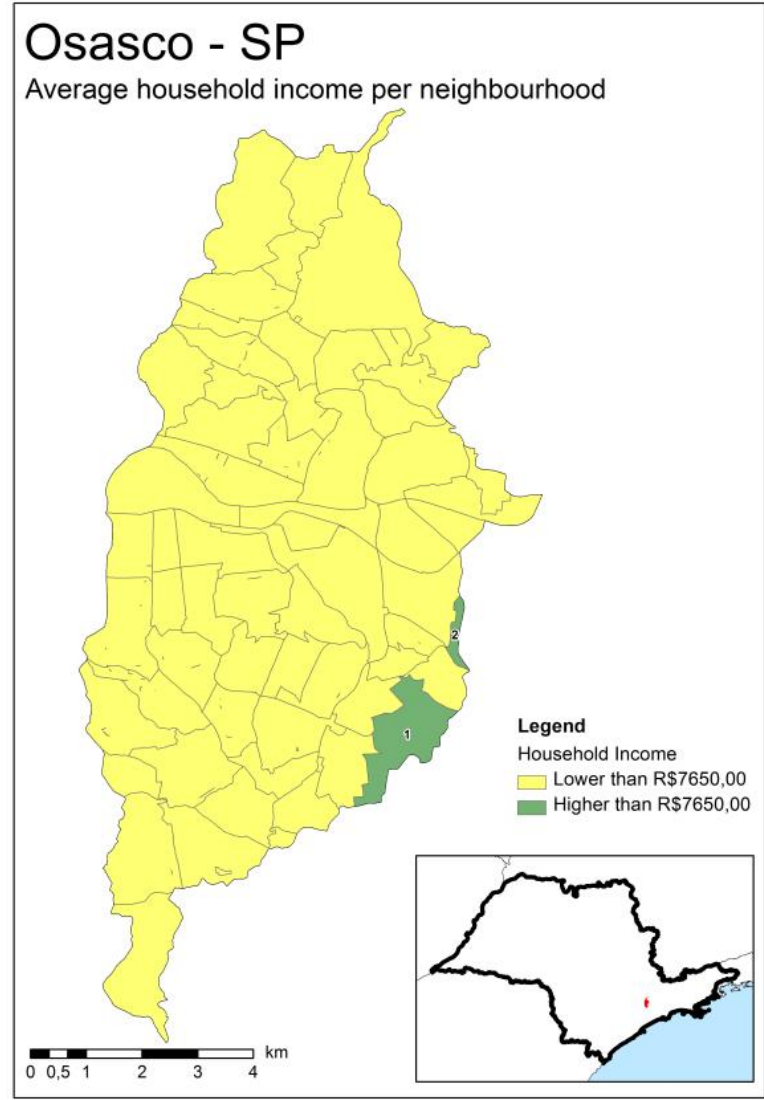
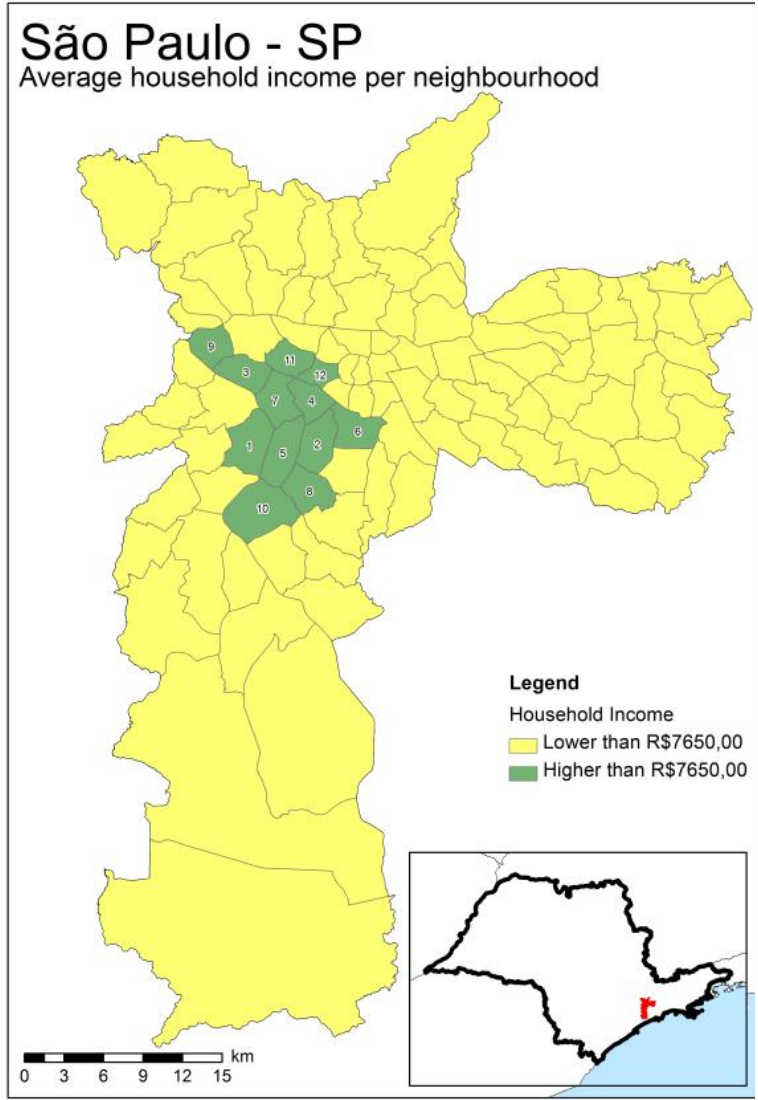


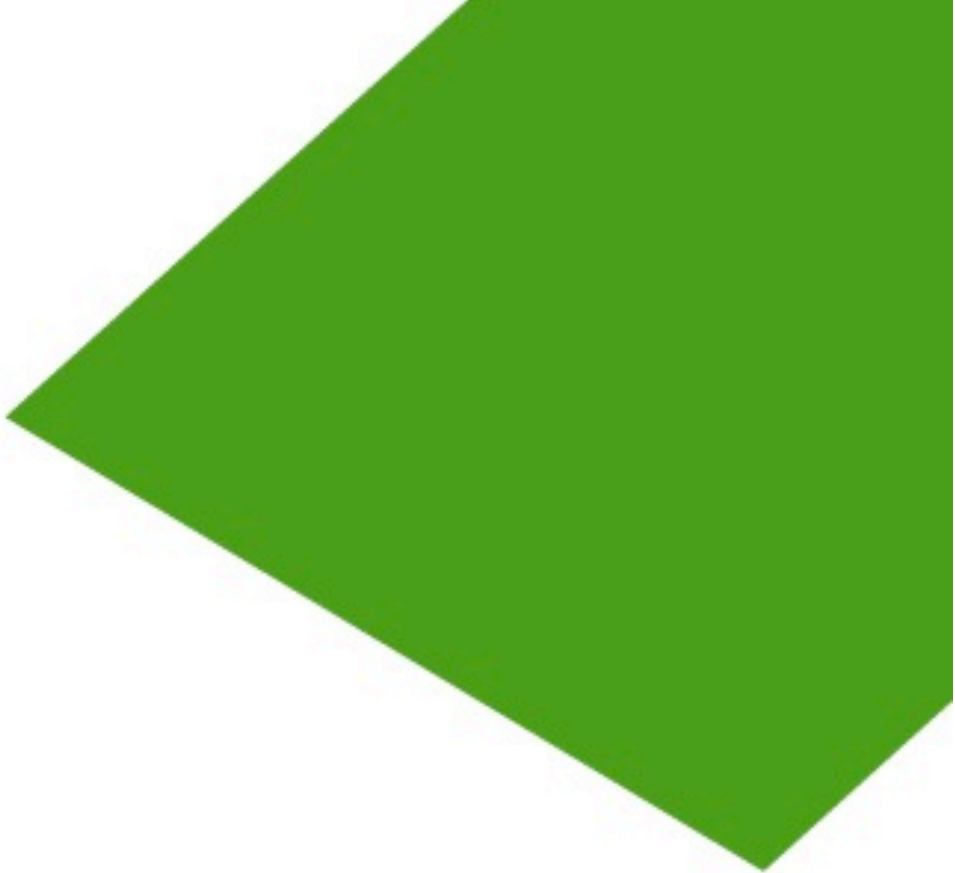
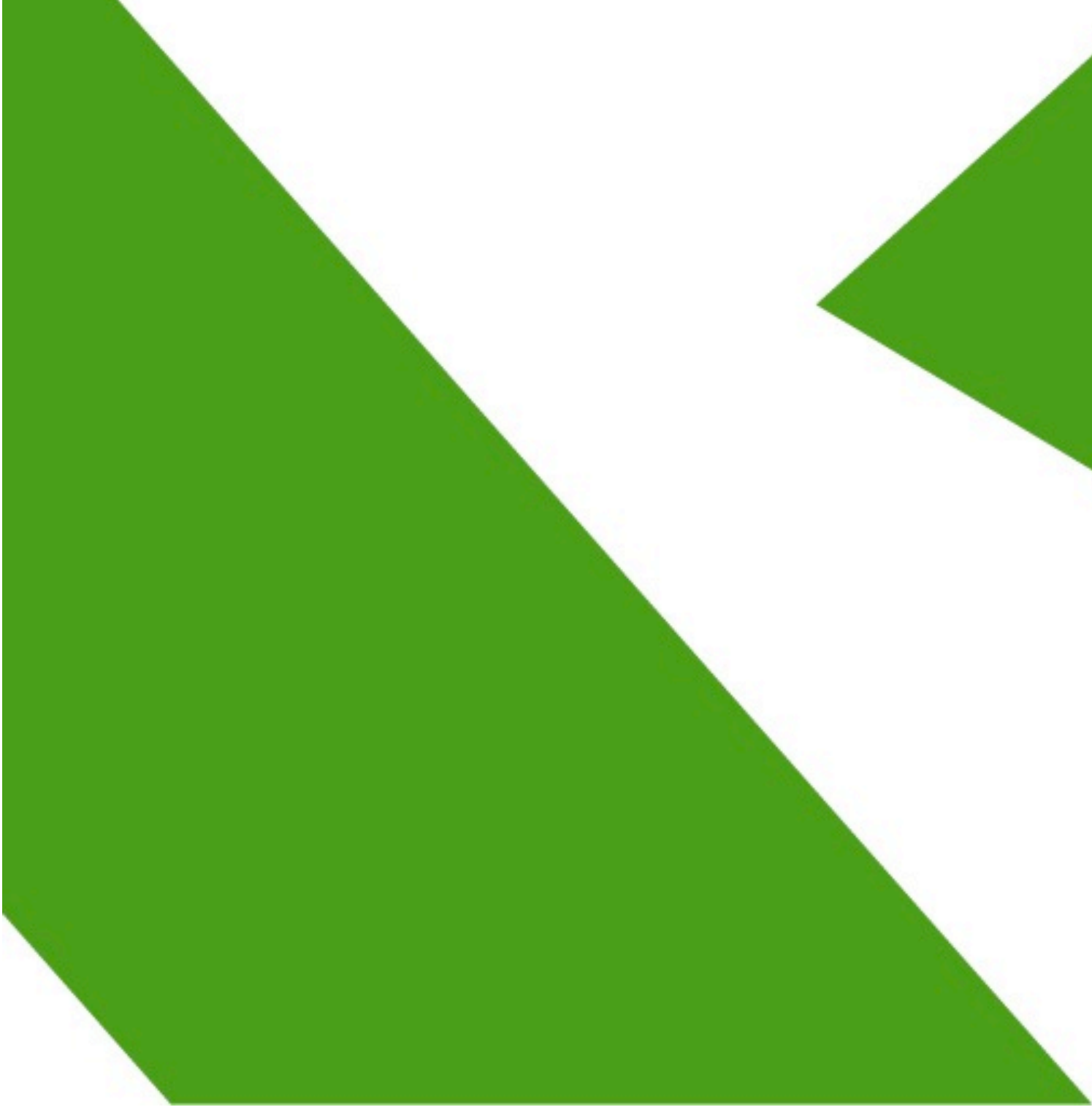
# Model results: target destinations for Potential Tourist Research



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Santo André
Santos
São Caetano do Sul
São José dos Campos
São Paulo
<b>Distrito Federal - DF</b>
Brasília

# Target destinations for Potential Tourist Research





Potencial Demand

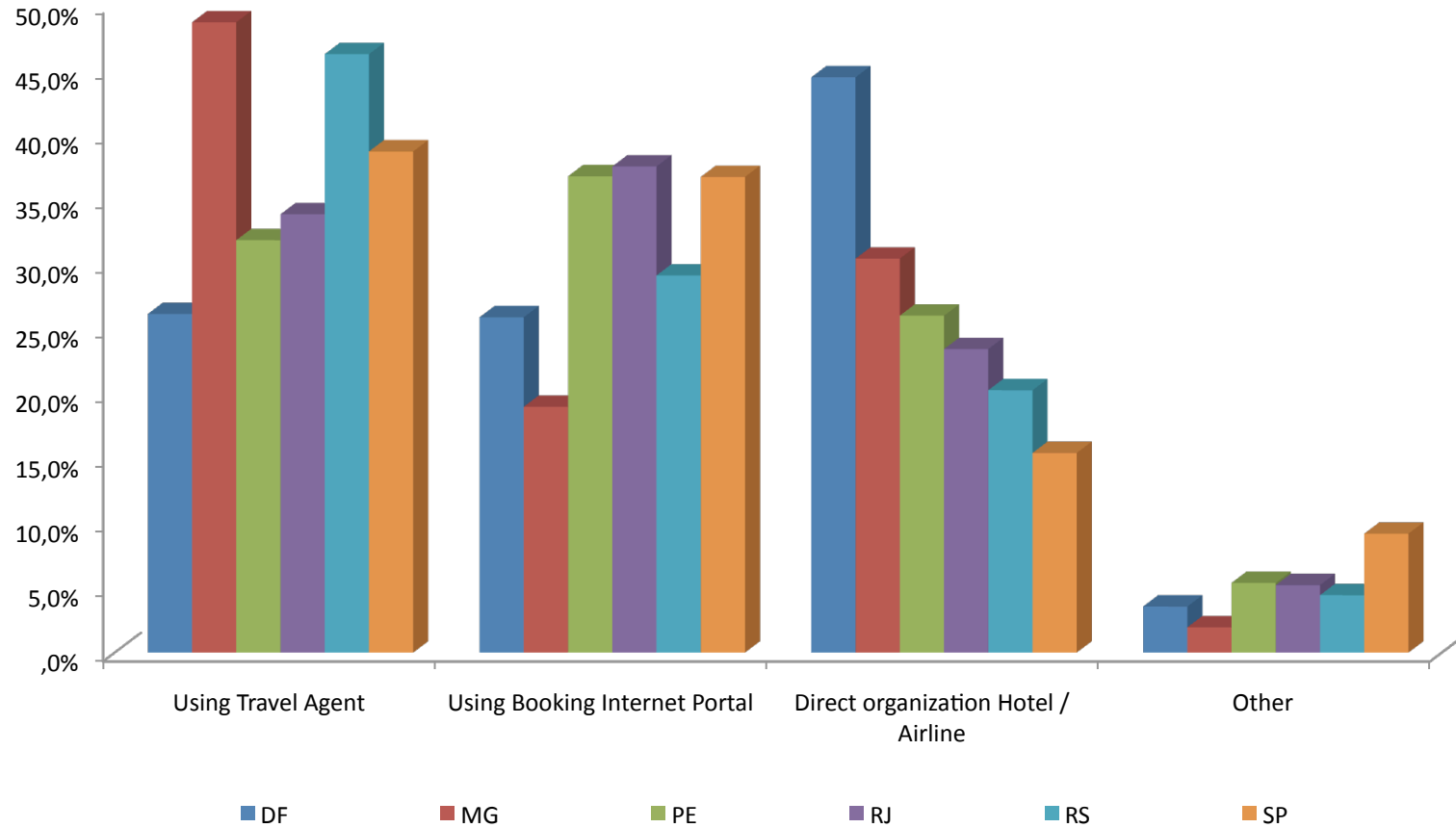
## Filters



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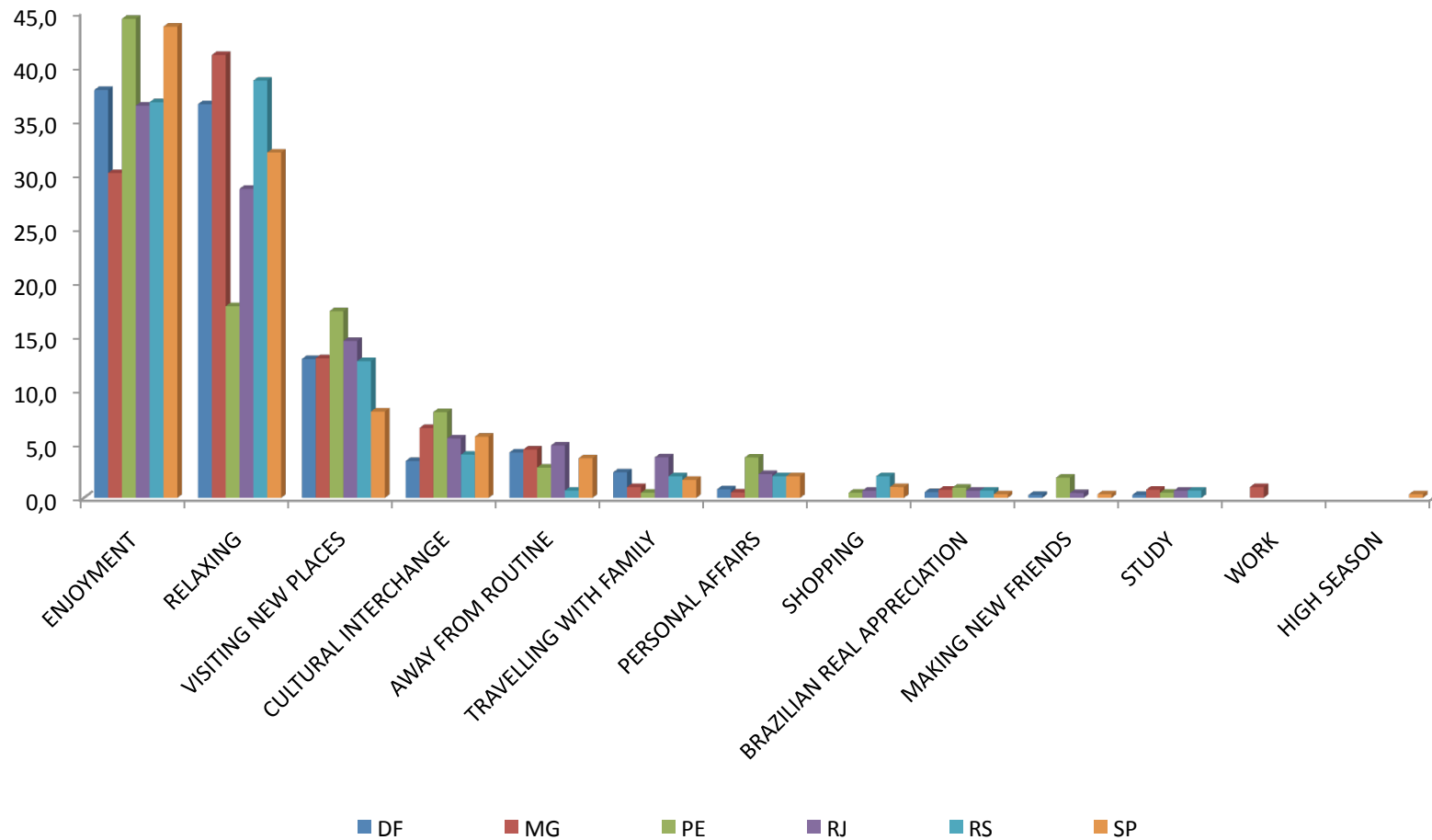
1: Do you intend to take at least one leisure international trip in the next two years?

### Trip Organization



3. How do you organize your trip ?

### Reasons for traveling



6. Quote a reason to travel on vacations

Travel seasons

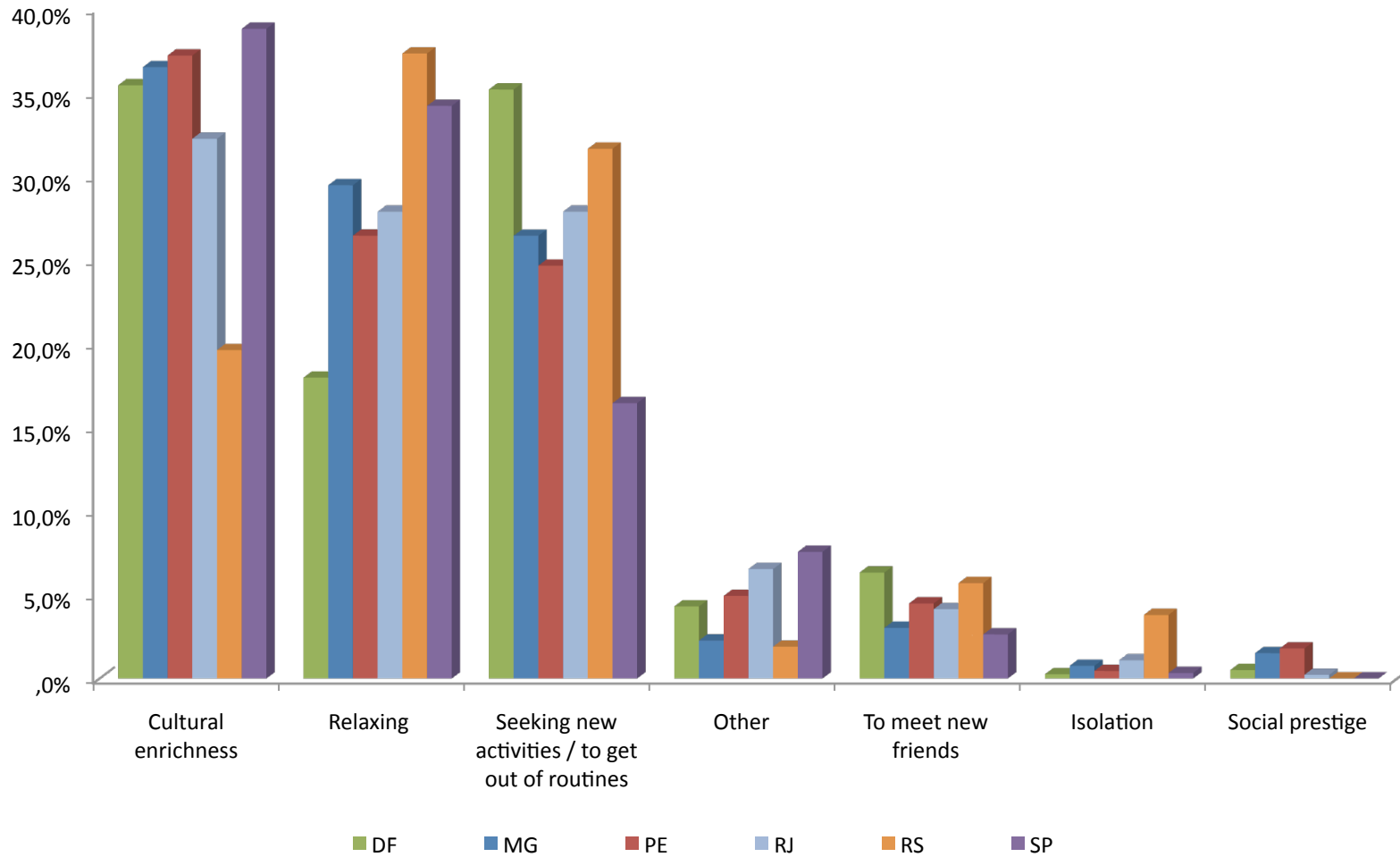
	DF	MG	PE	RJ	RS	SP
January	22,6%	20,1%	30,0%	23,9%	19,6%	30,8%
February	4,6%	4,4%	4,9%	11,4%	12,0%	3,6%
March	9,4%	6,1%	4,9%	5,7%	7,6%	9,8%
April	9,7%	7,3%	7,2%	6,3%	3,2%	10,8%
May	9,9%	7,3%	3,1%	10,5%	5,1%	12,8%
June	9,4%	5,3%	5,4%	8,1%	5,1%	8,9%
July	21,4%	15,3%	27,4%	25,2%	6,3%	42,0%
August	8,9%	5,6%	4,0%	9,6%	4,4%	9,8%
September	14,2%	5,6%	8,5%	16,0%	5,7%	16,4%
October	14,5%	7,0%	9,0%	10,3%	5,7%	12,1%
November	5,6%	4,6%	9,0%	6,6%	5,1%	5,2%
December	16,3%	9,0%	19,7%	17,1%	5,7%	17,0%
Any month	23,7%	28,9%	15,7%	14,2%	33,5%	4,6%

South Hemisphere Summer

South Hemisphere Winter

8. Considering a international trip, in which month do you prefer to travel?

### Reason for international travel



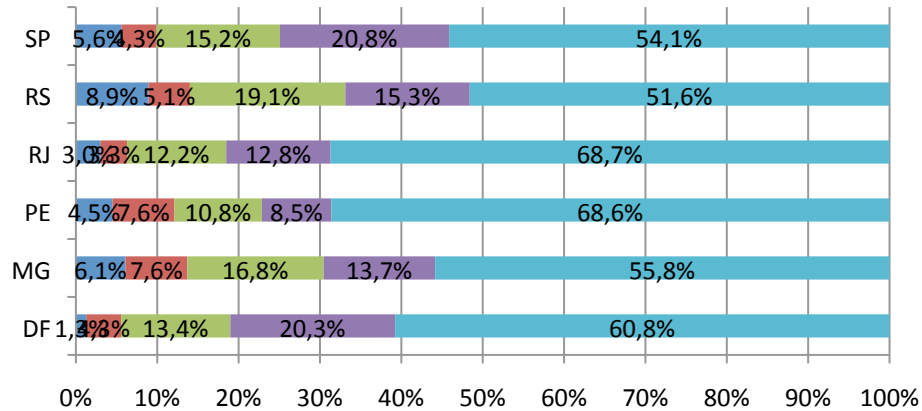
10. What motivates you to travel abroad ?



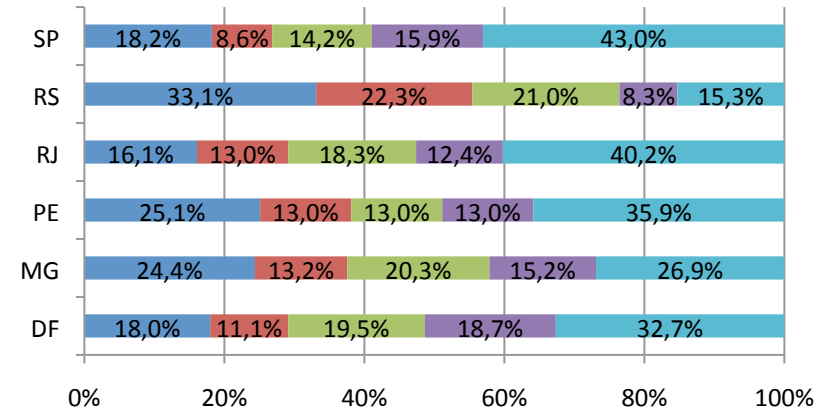
# Potential Demand



### Low fares

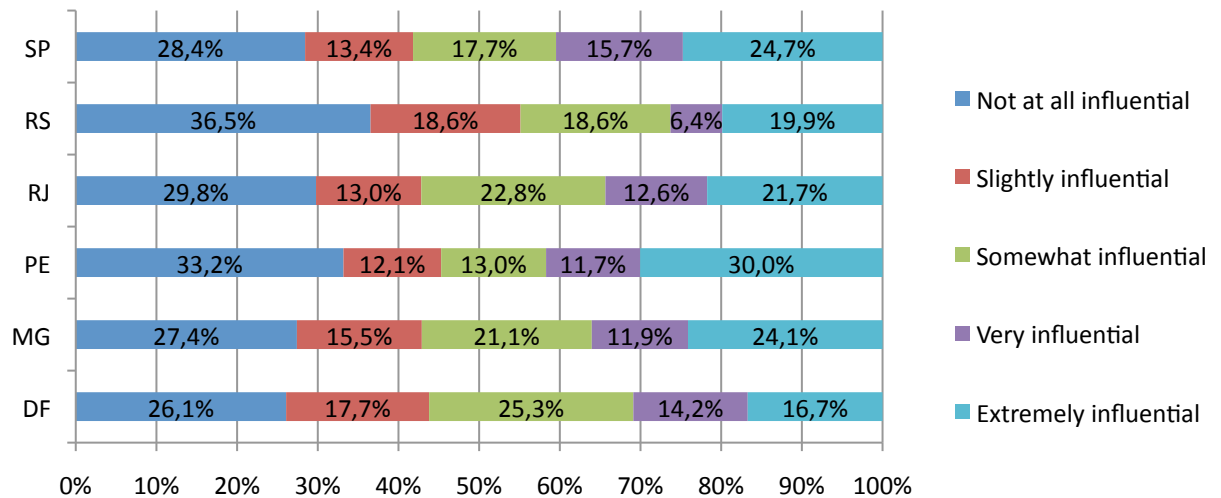


### Direct Flights



Brazilian tourists are cost sensitive

### Visa exempt

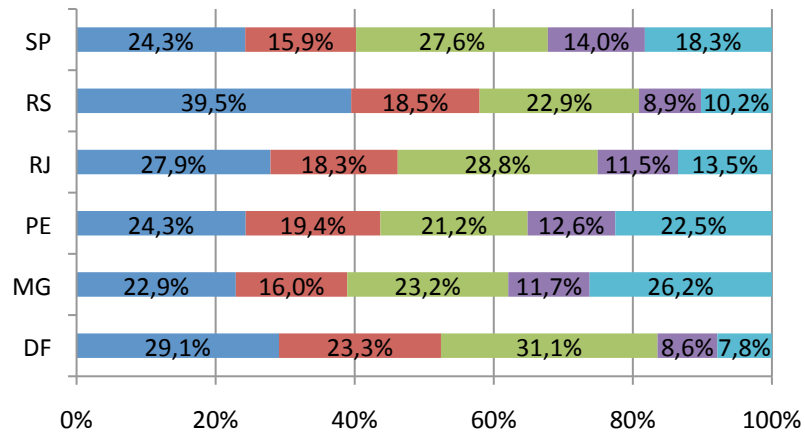


13. What influences you the most to choose an international trip?

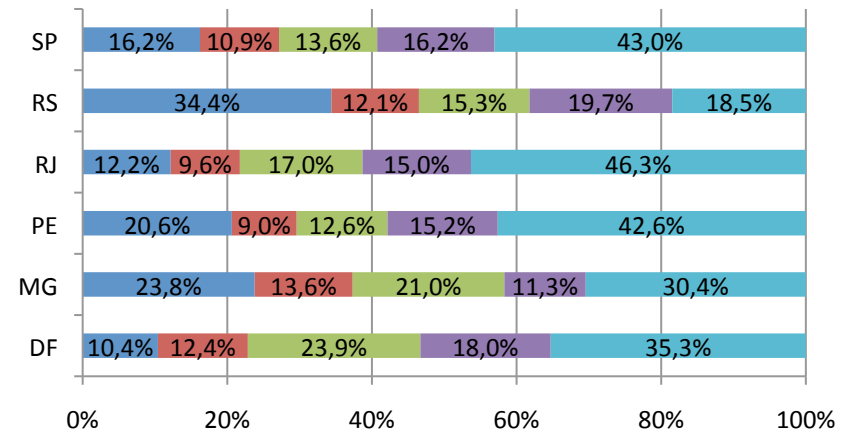
# Potential Demand



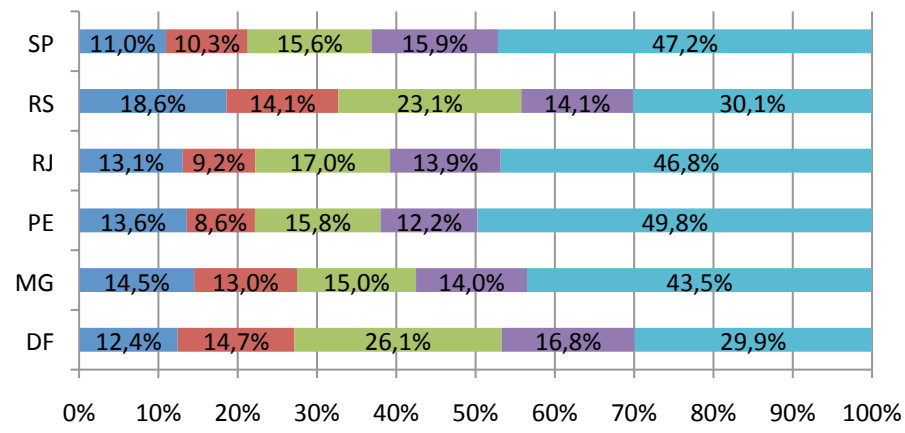
## Knowledge of local language



## Issuing reward tickets



## Combining leisure and shopping

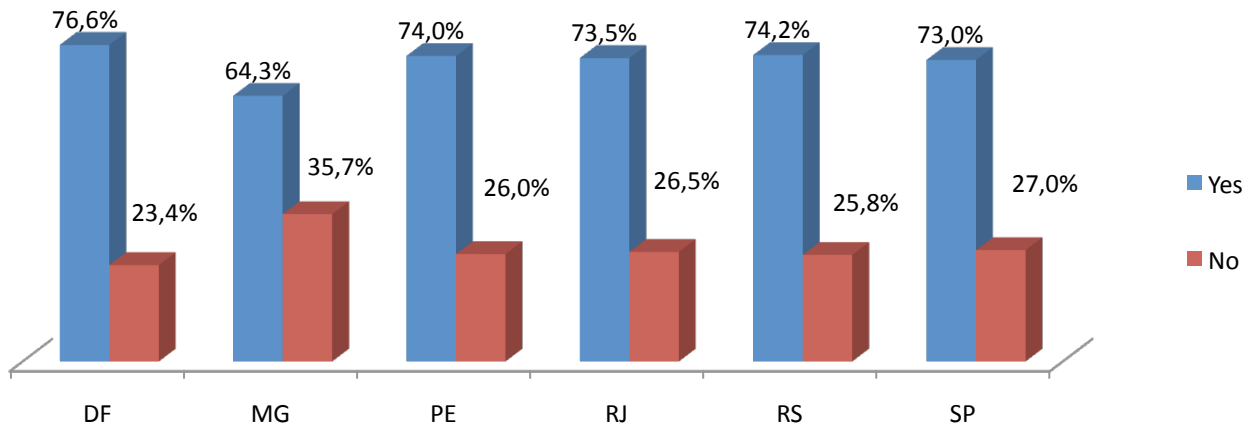


- Not at all influential
- Slightly influential
- Somewhat influential
- Very influential
- Extremely influential

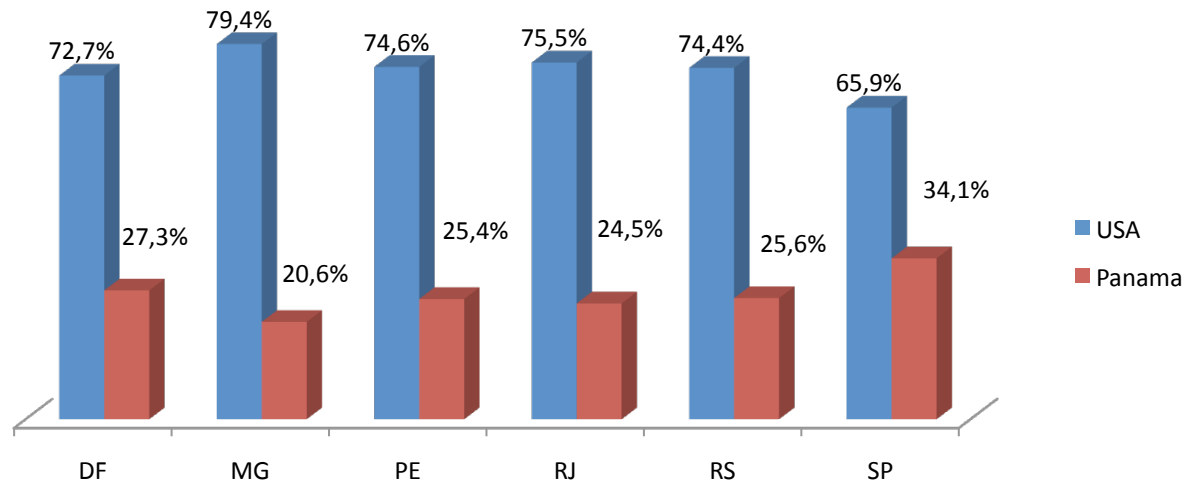
Shopping + Leisure have great influence in the Decision Making process

13. What influences you the most to choose an international trip?

Willingness to combine leisure and shopping

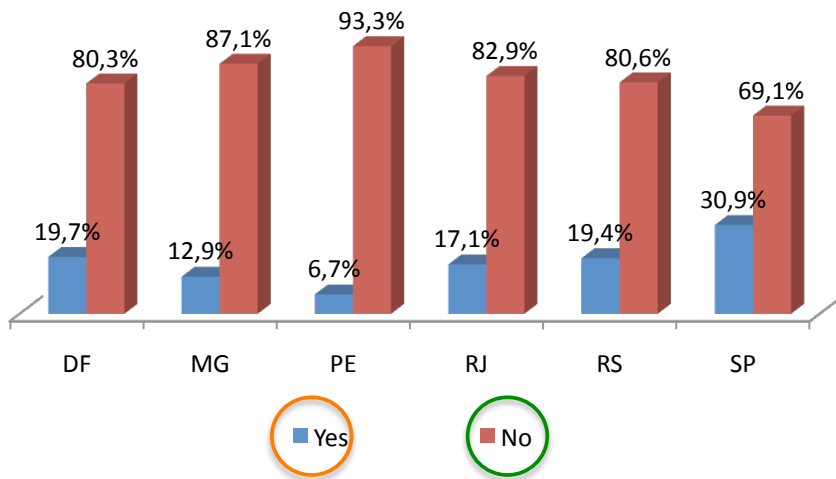


Preferred stop over to shop

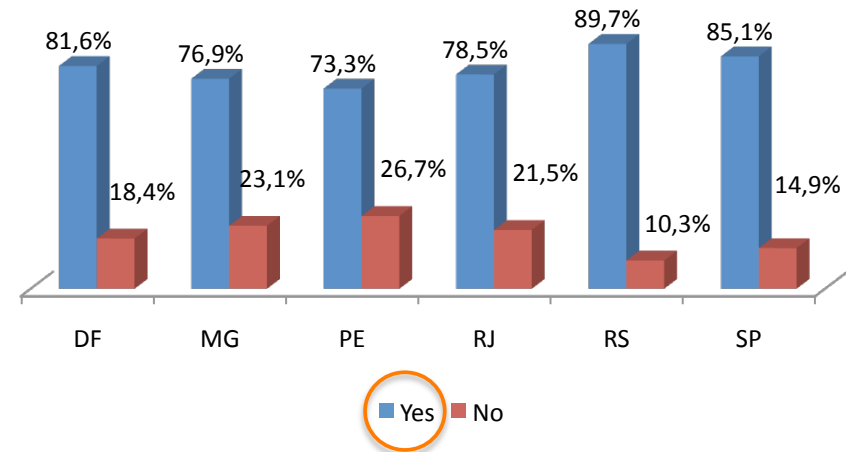


26. Would you like to travel to the Caribbean, combining leisure and shopping?  
 27. If yes, in which stop over would you rather do the shopping ?

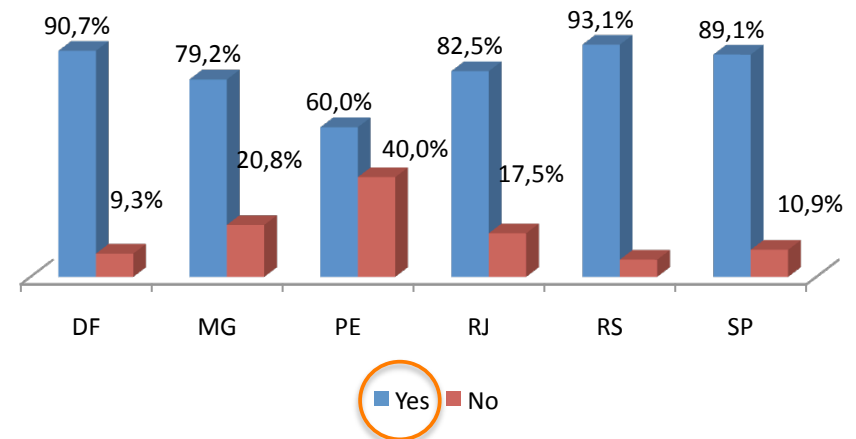
Have you ever been to the Caribbean?



If yes, would you like to go back?

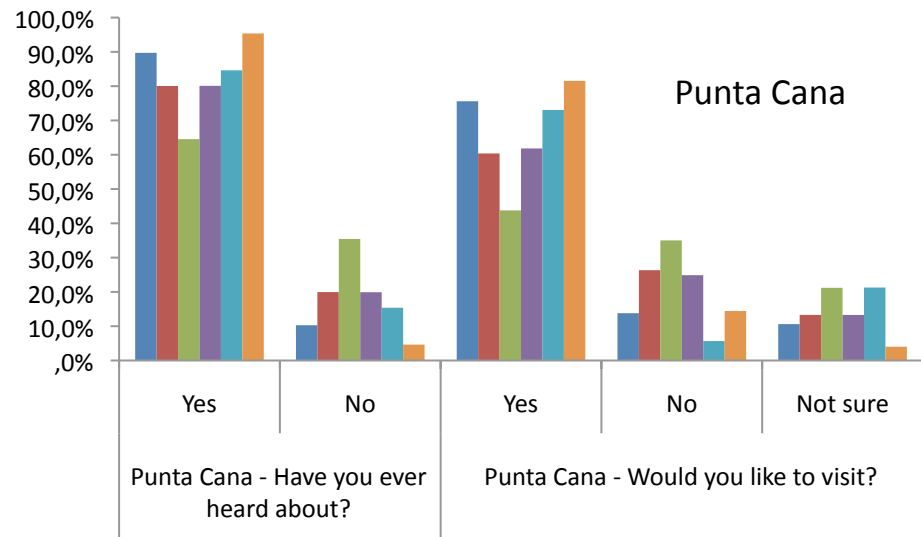
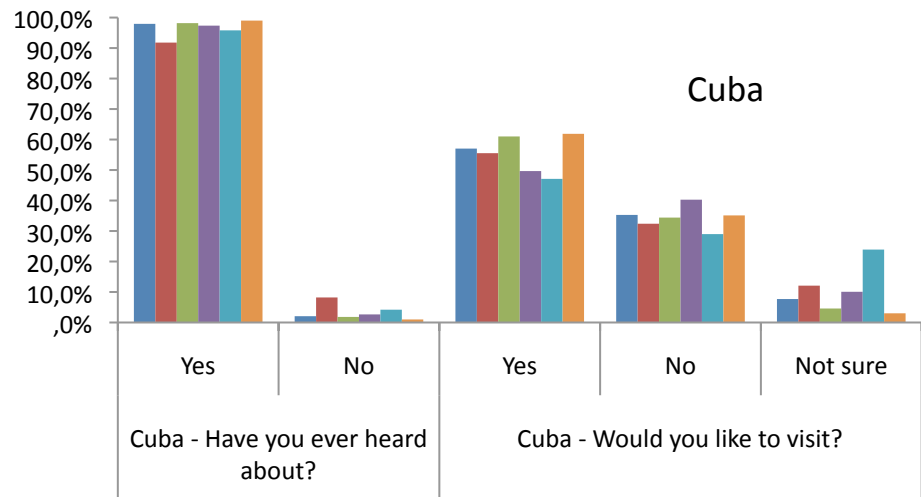
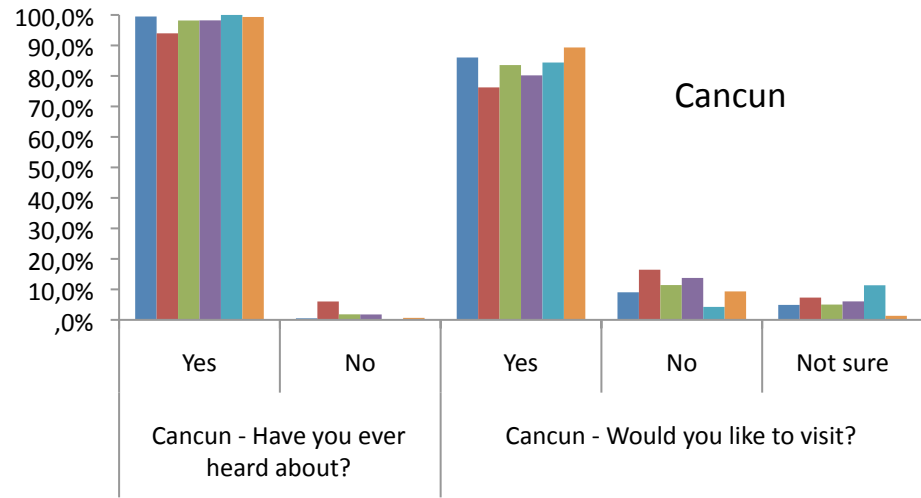
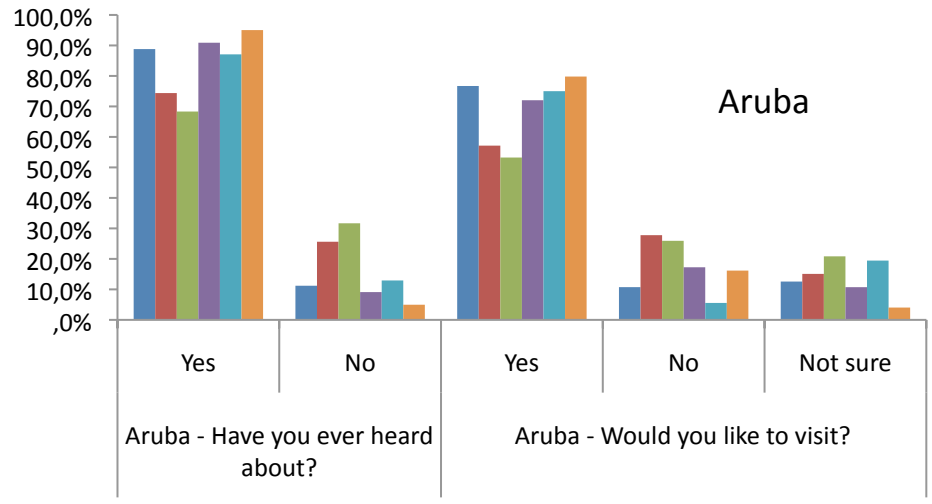


If yes, would you like to visit a new destination in the Caribbean?



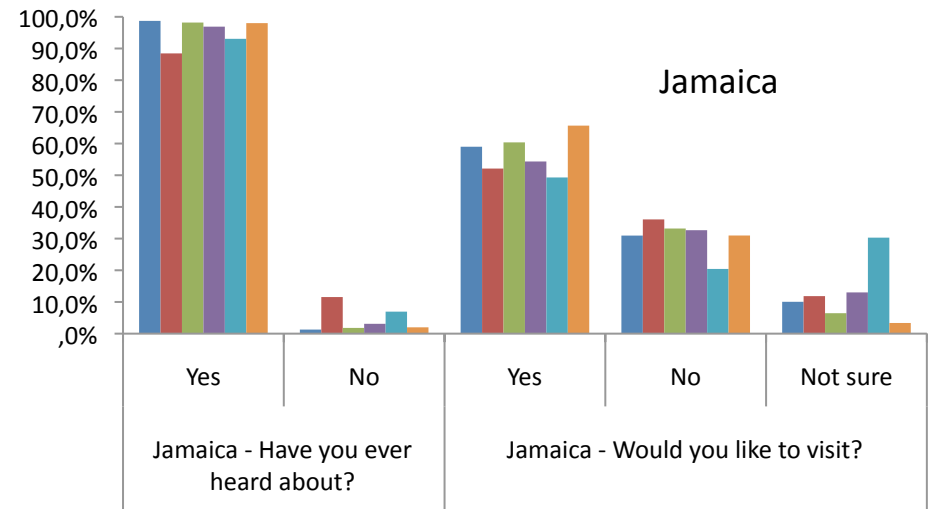
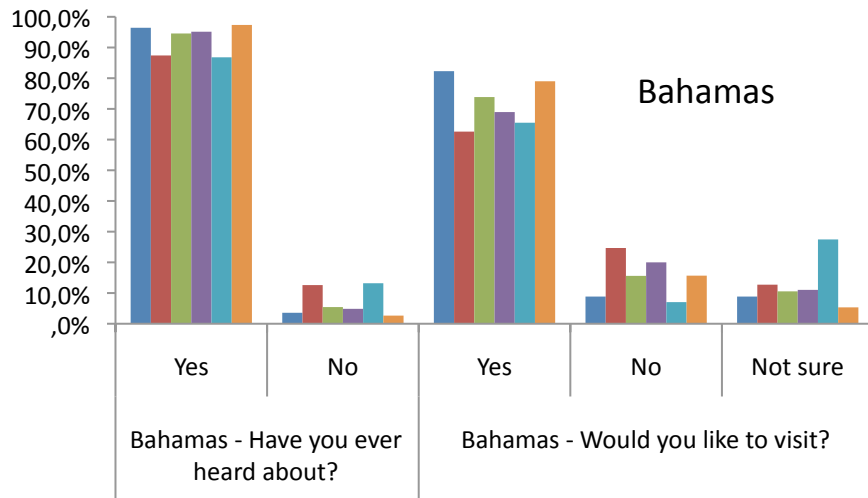
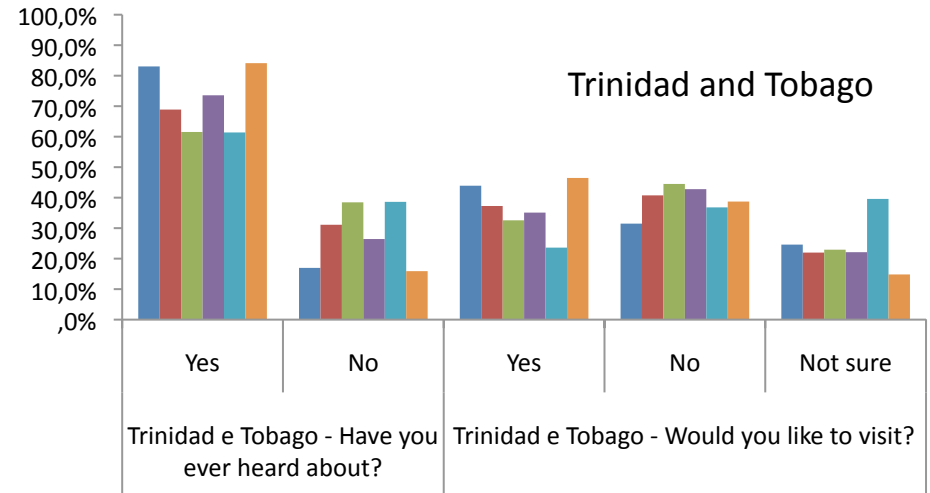
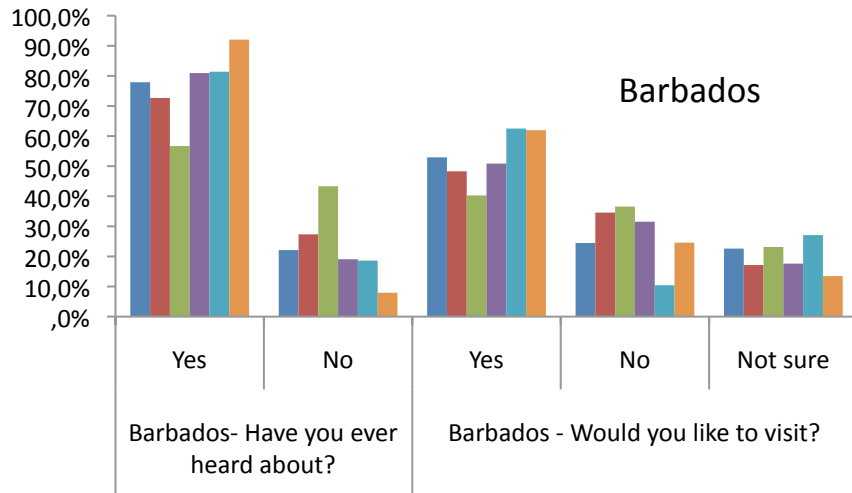
- 20. Have you ever been to the Caribbean?
- 21. If yes, would you like to go back?
- 22. Would you like to visit a new destination in the Caribbean?

# Potential Demand



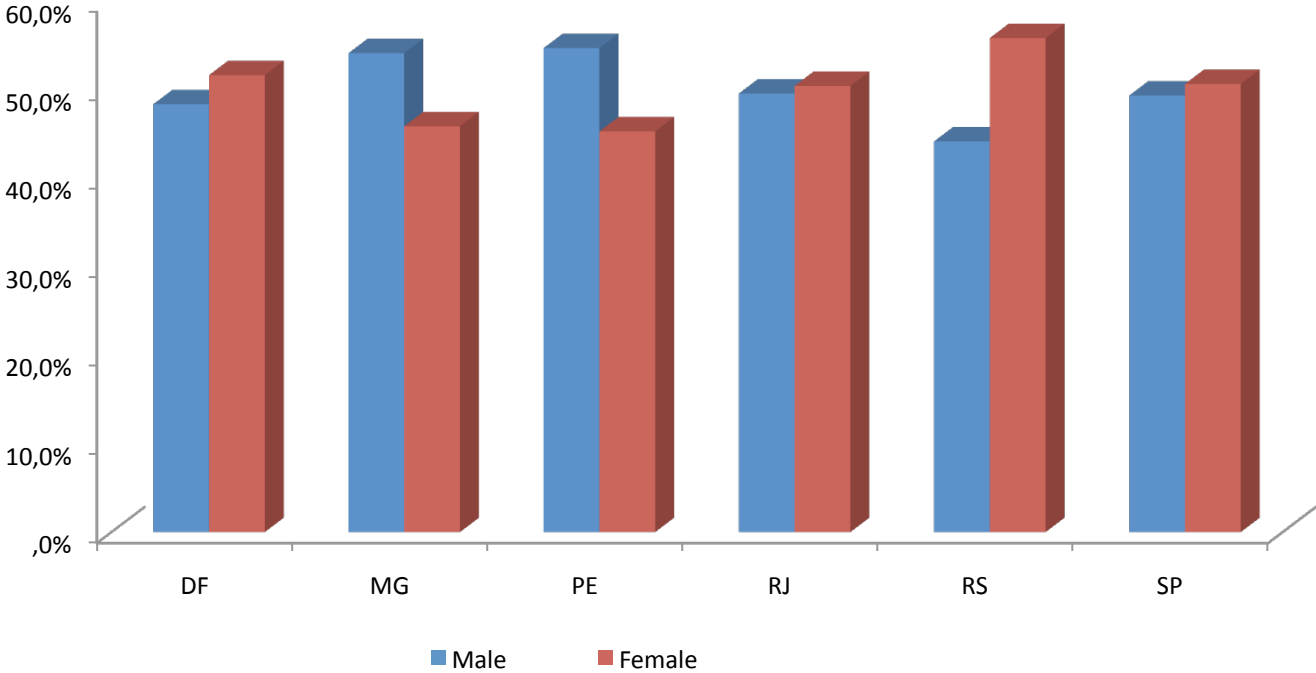
25. Among the destinations below which ones have ever heard about / or would like to visit?

# Potential Demand

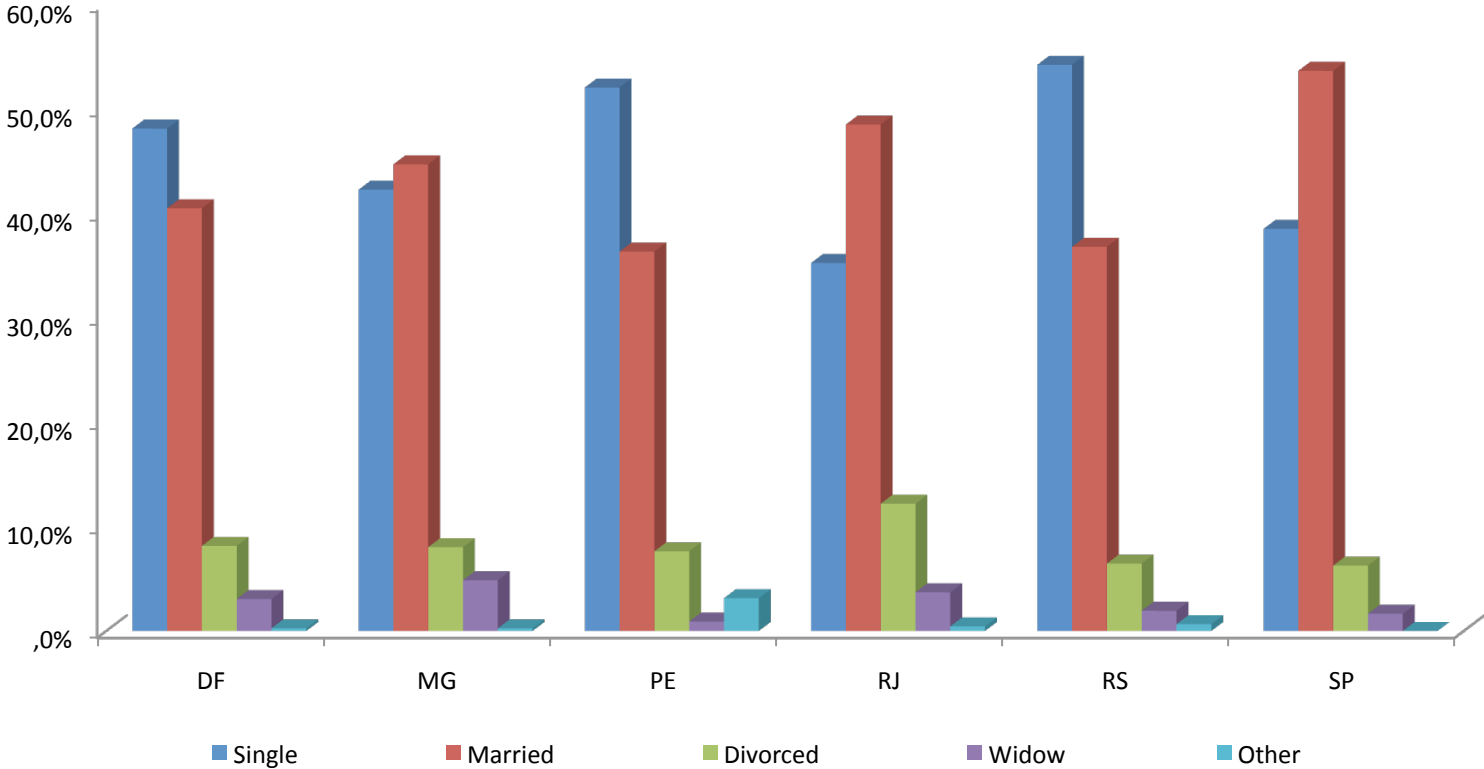


25. Among the destinations below which ones have ever heard about / or would like to visit

Gender



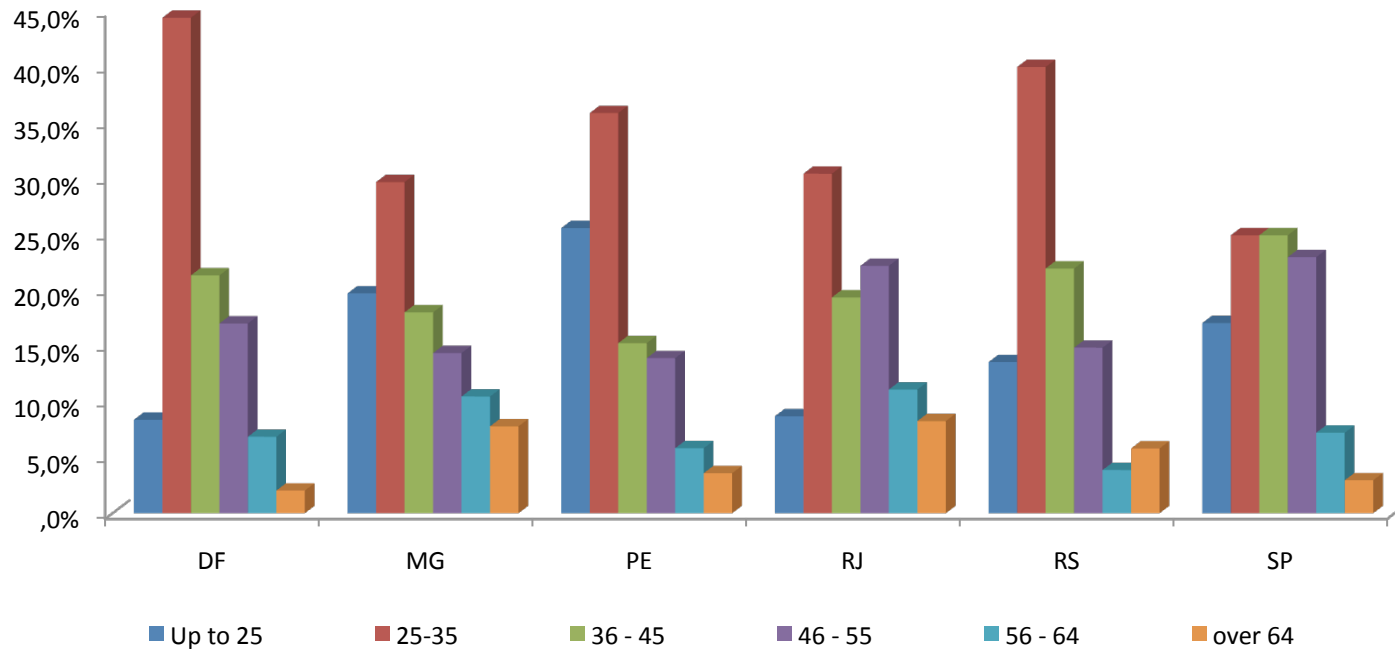
Marital status



33. What is your marital status ?

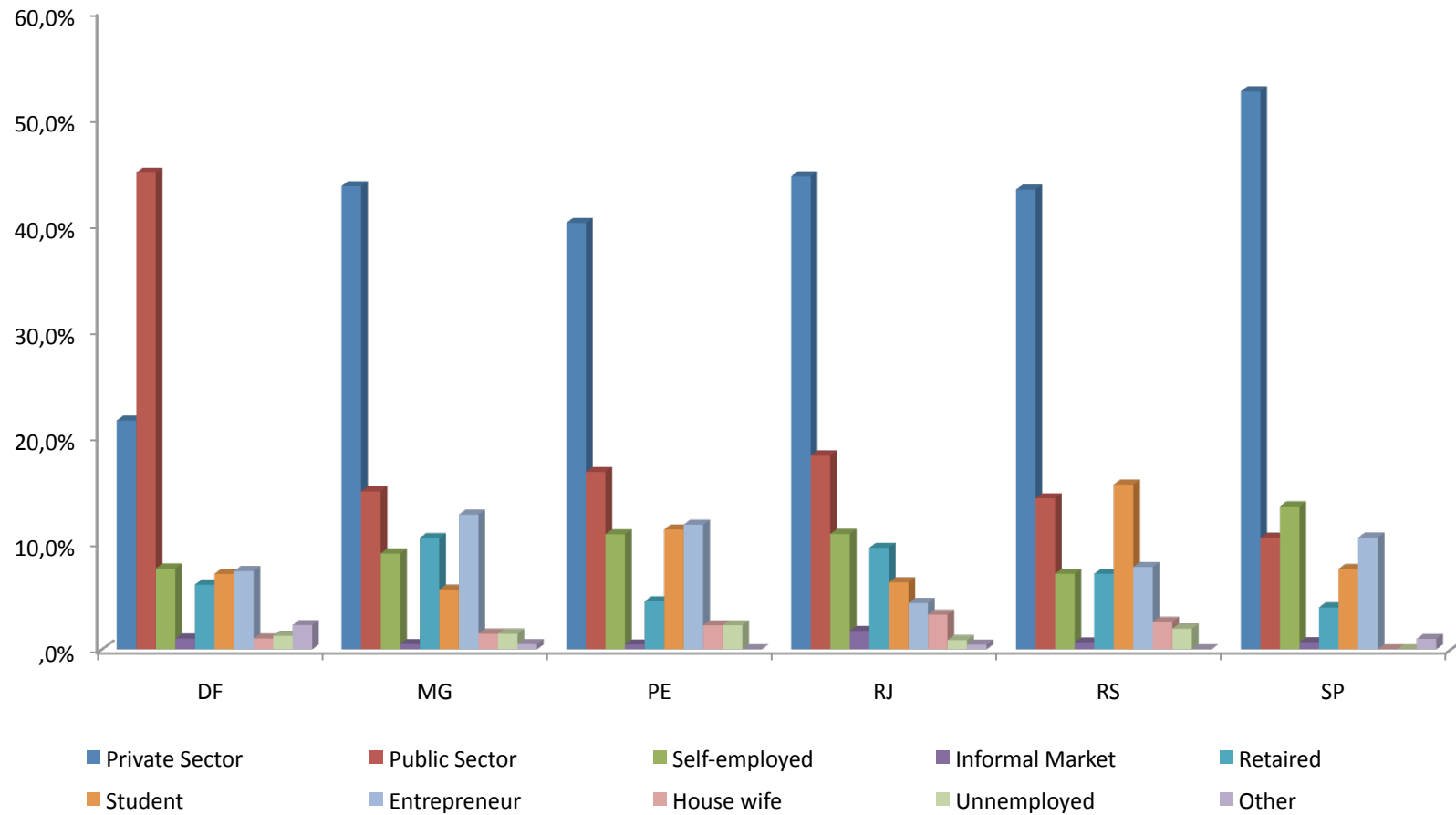


### Age

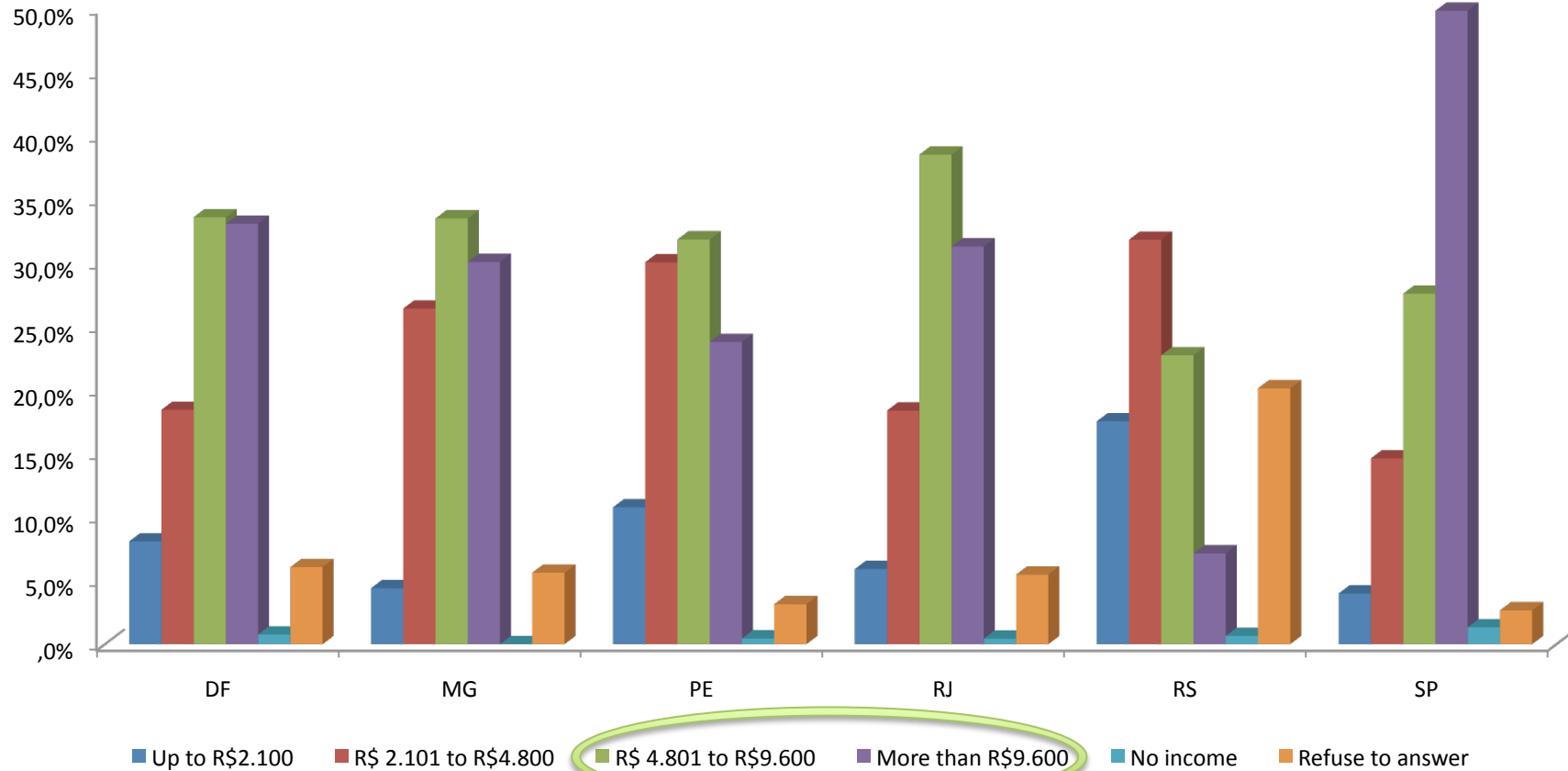


34. What is your age ?

What is your present occupation?



Family income (Monthly R\$)



Higher income classes  
( + US\$4.800,00 per month)

37. What is your family income (per month in Brazilian Reais - R\$)?

**FGV PROJETOS**

*Tourism Unit*

Thank You.

Luiz Gustavo M Barbosa

Head of Tourism Unit

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