Brazil
Tourism Market Insights

2025

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Contents

Brazil
Western Cape, South Africa
Johannesburg, South Africa

1. Key Insights

Key drivers for travel to South Africa and the Western Cape

- **Consumer perception post-pandemic**: Brazilian consumers now recognise travel as essential for their well-being and mental health. They prioritise travel over material possessions and are willing to make budget adjustments to ensure that they can fund these important experiences.

- **Air connectivity – São Paulo to Cape Town:** On June 29, 2023, Wesgro announced that the Western Cape now has a direct connection to South America. South African Airways (SAA) introduced a new direct, non-stop flight connecting Cape Town International Airport with São Paulo-Guarulhos International Airport (GRU) in São Paulo, Brazil.

- **Air connectivity – São Paulo to Johannesburg**: LATAM Airlines operates four flights a week between JNB OR Tambo International Airport and GRU in Sao Paulo. In addition, South African Airways operates a two-weekly flight between the same airport pairs.

- The reason for long-haul international travel usually includes leisure or a holiday.

- Brazilian travellers often prioritise several key features when selecting their destinations. These include the availability of inclusive hotels and resorts, a strong emphasis on safety and security, and options that promote relaxation and well-being.

- Brazilian leisure travellers are increasingly searching for real-world experiences that provide various activities. These include a strong interest in local eco-adventures, cultural and heritage tours, family holidays, culinary experiences, and wellness experiences.

- Brazilian travellers aged 25–30, 31–34, and 41–50 are increasingly willing to engage in long-haul international travel.

Brazilian tourists visiting the Western Cape:

- In 2024, the Western Cape accounted for 59.0% of South Africa's Brazilian tourist arrivals, with a 160% increase to 29,401 visitors, up from 11,319 in 2023. This resulted in a total foreign direct spend of R451 million and a total of 324,970 bed nights, averaging a length of stay of 11.4 nights. Brazilian tourists spent an average of R16,700 in the province.

Opportunities for the Western Cape to attract Brazilian tourists:

- **Leveraging technology solutions:** It is essential to leverage technology to provide tourists with user-friendly tools for planning and enhancing their travel experiences. This can include advancing the use of destination bookmarks equipped with QR codes and digital playbooks.

- **Promoting sustainable tourism:** The Western Cape plays an important role in continuing to prioritise and drive the sustainability agenda. Promoting eco-friendly travel packages is crucial for preserving cultural and natural heritage.

- **Tailoring marketing strategies for specific tourism offerings:** This involves increasing support in the development of niche tourism experiences such as culture and heritage tourism, ecotourism, adventure tourism and wellness tourism to attract and maintain diverse Brazilian tourists.

Source: Euromonitor International, Voice of the Travel Consumer Survey (2024); South African Tourism (2025); Wesgro Tourism Unit Insights (2024); Cape Town Air Access Powered by Wesgro (2023)

2. Objectives and Methodology

Objectives

Market research in the tourism sector is essential for gaining insights into travellers' preferences and behaviours which can be obtained from examining various factors such as economic conditions and cultural influences. It also plays a crucial role in identifying emerging markets and monitoring the performance of the tourism industry (SIS International Market Research, 2025; Tourism International Development, 2025).

This report offers valuable insights into Brazil's tourism economy and consumer profile, focusing on the number of tourist arrivals to South Africa and the Western Cape, as well as on air travel connections, and key travel trends and preferences.

Methodology

To compile this report, a comprehensive approach involving the use of secondary research was employed to gather valuable insights into the Brazilian traveller market. Various research sources were referenced, including international and national databases and travel industry reports.

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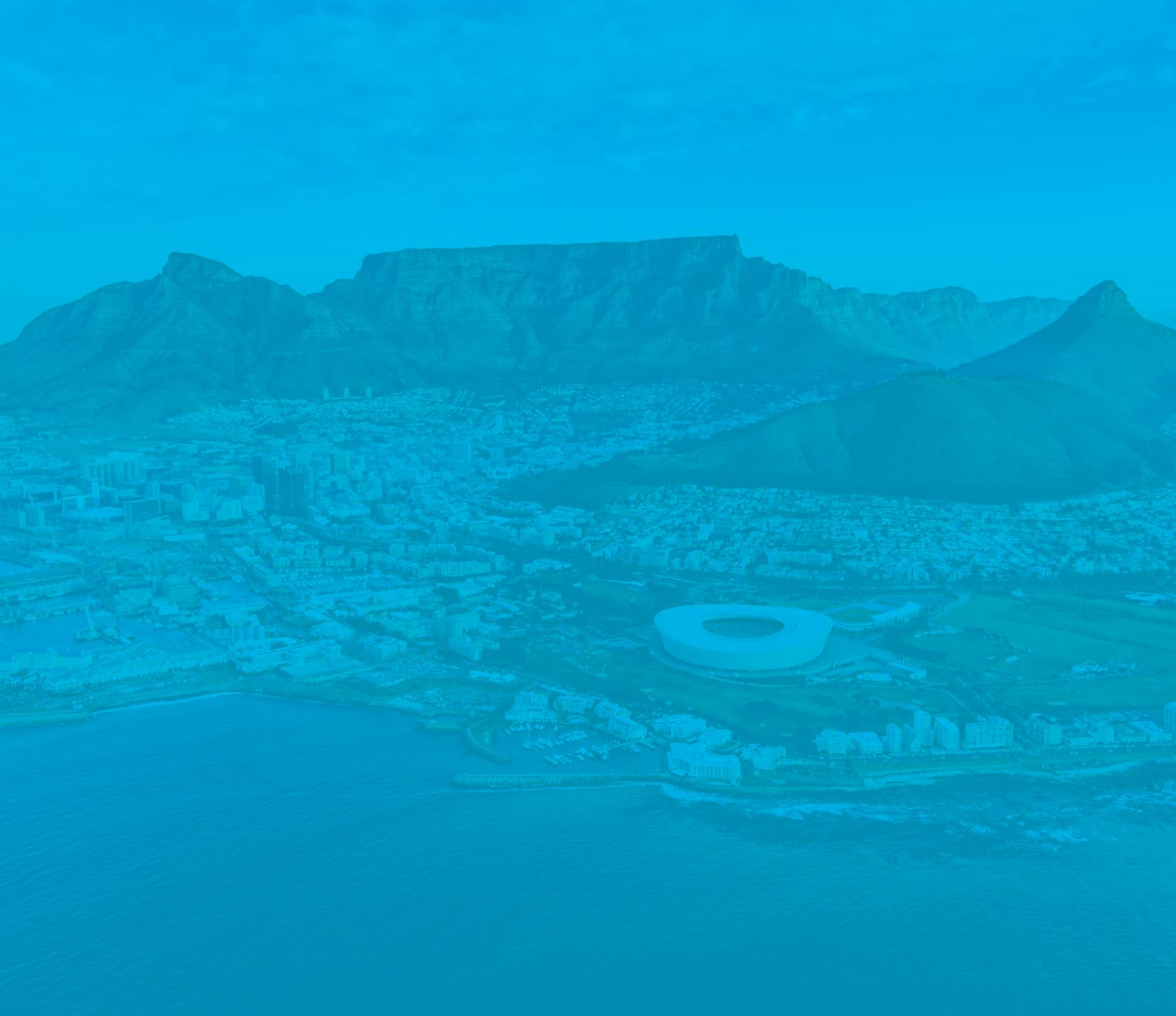

3. Overview of Brazil and the Travel Market

3.1 Definitions

Visitor exports – Spending within the country by international tourists for both business and leisure trips, including spending on transport, but excluding international spending on education.

Business travel spending – Spending on business travel within a country by residents and international visitors.

Leisure travel spending – Spending on leisure travel within a country by residents and international visitors

Business air outbound – International trips by residents for business purposes including unmanaged and managed, and MICE – meetings, incentives, conferences and exhibitions. Air outbound departures include scheduled airlines, charter and low-cost carriers.

Travel & tourism – Relates to the activity of travellers on trips outside their usual environment with a duration of less than one year. Economic activity related to all aspects of such trips is measured within the research.

Leisure air outbound – Refers to all international trips by national residents for leisure purposes including recreational trips/holidays, visiting friends and relatives and other purposes (such as sports, education, medical, shopping, religion etc). Outbound air travel includes scheduled airlines and non-scheduled airlines.

Direct contribution to gross domestic product (GDP) – Refers to GDP generated by industries that deal directly with tourists, including hotels, travel agents, airlines and other passenger transport services, as well as the activities of restaurant and leisure industries that deal directly with tourists.

Total contribution to employment – The number of jobs generated directly in the Travel & Tourism sector, plus the indirect and induced contributions.

Outbound departures – The number of outbound trips by residents of the country of origin to the destination country, excluding day trips.

Source: Adopted from Euromonitor International (2025); WTTC (2024)

3.2 Overview of Brazil

About Brazil	
Where is Brazil ?	Brazil is the largest country in South America and is bordered by Argentina, Bolivia, Colombia, French Guiana, Guyana, Paraguay, Peru, Suriname, Uruguay and Venezuela. Its coastline meets the Atlantic Ocean.
Total population	• 220 million 2024(E) (Market share: 7 million) • Largest Generation: Millennials (2023)
Language	Portuguese is the official language
Religion	Roman Catholic 52.8%, Protestant 26.7% (Evangelical 25.5%, other Protestant 1.2%), African-American cultist/Umbanda 1.8%, other 3%, agnostic/atheist 0.6%, none 13.6%, unspecified 1.4% (2023 est.).
Economy	• According to WTTC's latest Economic Impact Research (EIR), in 2025 Travel and Tourism is forecast to support 8.9 million jobs, surpassing 7.7 million jobs created in 2019. • Travel & Tourism is forecast to account for 7.9% of all jobs in Brazil. • Domestic visitor spending in 2025 is forecast to reach USD113.2 billion, 14.8% above 2019 levels. • International visitor spending is expected to reach USD7.5 billion, 20.1% above pre pandemic levels. • Travel & Tourism total contribution to the economy is projected to reach USD167.6 billion in 2025, equivalent to 7.7% of the country's GDP, 11.2% above 2019 levels.
Time difference	South Africa is four hours ahead of Brazil.
Climate	Mostly tropical, but temperate in the south

***USD** – United States dollar*

Sources: CIA World Factbook (2024); Euromonitor International (2024), WTTC (2025); South African Tourism (2023)

3.3 Overview of the Brazil travel market

Figure 1 shows that in 2024, total outbound air departures from Brazil reached 8.8 million, reflecting a year-on-year increase of 17.2% in relation to 2023. Looking ahead, outbound air departures are projected to rise steadily to 9.5 million in 2025 and are forecasted to reach 11.3 million by 2029.

Notably, out of the 9.5 million air outbound trips estimated for 2025, leisure will rank as the top contributor to outbound air departures from Brazil, estimated to total 6.8 million in 2025 and forecasted to reach 8.0 million by 2029. These projections highlight the growing propensity of Brazilian travellers to engage in international leisure activities, reflecting broader economic and social trends in global tourism dynamics.

Analysing Brazilian outbound air travel trends indicates that South Africa, particularly the Western Cape, is an appealing destination for Brazilian travellers. The Western Cape offers a diverse range of activities and experiences that can cater to both leisure seekers and business professionals. This insight highlights the necessity of developing marketing strategies and campaigns specifically tailored to effectively target this market.

Figure 1: Brazil Air Outbound departures, 2024–2029F

	Total Air Outbound	Leisure Air Outbound	Business Air Outbound
2024	8,808,500	6,380,700	2,427,800
2025E	9,502,300	6,854,700	2,647,600
2026F	9,914,400	7,135,300	2,779,200
2027F	10,531,500	7,408,700	3,122,800
2028F	10,944,500	7,704,200	3,240,400
2029F	11,365,700	8,031,000	3,334,700

Note: All figures shown for 2025 are estimates (E) and forecast projections (F) for the years 2026 to 2029.
**Air outbound includes outbound trips by residents taken on scheduled airlines, charter or low-cost carriers for business and leisure purposes.*

Source: Euromonitor International (2025)

4. Brazilian Travellers Visiting South Africa and the Western Cape

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4.1 SA Tourism definitions and methodology

Visitor – Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for travel is other than the exercise of an activity to be remunerated at the place visited.

Same day visitor – Any person who visits a place without staying the night.

Tourist – A visitor who stays at least one night in the place visited.

International tourist – An international visitor who stays at least one night in collective or private accommodation in the country visited.

Overnight trip – A journey undertaken by one or more members of the household for at least one night away from home, where the persons travelling did not receive any remuneration (did not make any profit) at the destination. For a trip to be complete, the person must return to his/her place of residence.

TFDS – Stands for total foreign direct spend within South Africa. When reported it excludes the component spent on capital goods.

Average spend – The spend per tourist, obtained by dividing the total direct spend by the number of tourists.

Bed nights – A measure of occupancy representing the total number of nights tourists stay in South Africa.

Length of stay – The duration of time that a visitor or tourist spends at a destination or in the country; in this survey, it is calculated by dividing total bed nights by the total number of tourists.

Source: Adopted from South African Tourism (2025)

Methodology:

The tourism data represented in this section is based on findings obtained from South African Tourism's Analytics and Insights Unit and is derived from South African Tourism's Departure Survey.

The survey has been deployed by South African Tourism since 2001 to monitor and measure international tourism behaviour upon departing the country.

The survey aims to track tourist travel behaviour, expenditure, accommodation usage, experiences as well as satisfaction with South Africa as a holiday and business destination.

The survey is conducted monthly and covers South Africa's two main international airports (Oliver Tambo and Cape Town), as well as the 12 mainland border posts.

4.2 Tourism highlights: 2024

Table 1: Brazilian Tourism Market	
South Africa	**Western Cape**
Brazilian Tourist Arrivals	
49 855 (+94.2% increase compared to 2023)	29 401 (59.0% share of SA's tourist arrivals from Brazil) (+159.7% increase compared to 2023)
Total Foreign Direct Spend	
R1.05 billion (+59.8% increase compared to 2023)	R451 million (43.0% share of SA's TFDS from Brazil) (+119.7% increase compared to 2023)
Length of Stay	
14.5 nights (-9.9% decrease compared to 2023)	11.4 nights (+6.5% increase compared to 2023)

Top 4 age groups of tourist arrivals in SA

31–34 Years
41 - 50 years
25 – 30 years

Top 3 purposes of visit in SA

Holiday
MICE
Visiting Friends and Relatives (VFR)

Top 5 accommodation types used in SA

Friends & Family
Hotel
Air B&B
Self Catering
Game Lodge

Top 5 activities undertaken in SA

Cultural, historical and heritage
Wildlife
Visiting natural attractions
Theme parks
Beach

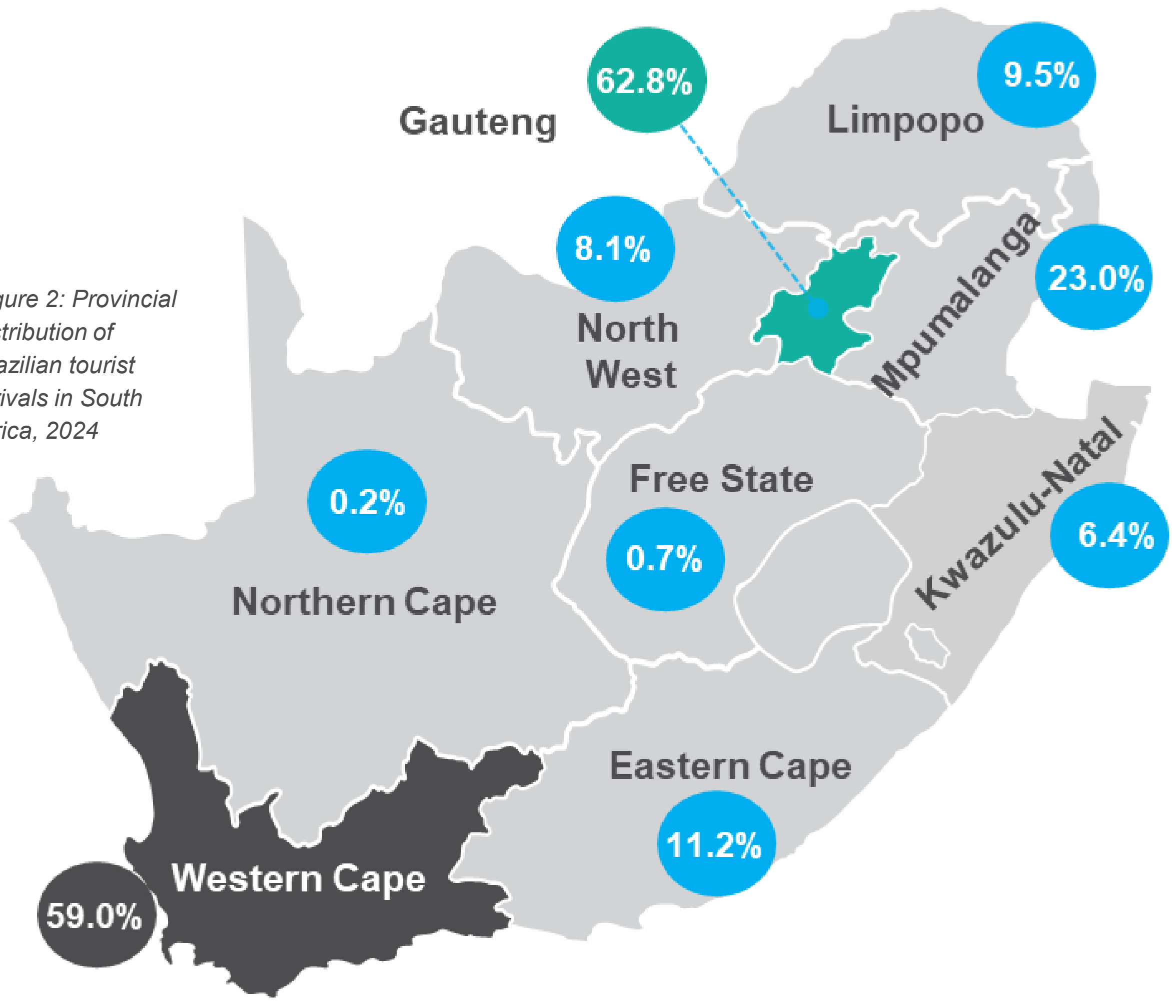
72.8% were first-time travellers to South Africa

Source: South Africa Tourism (2025)

4.3 Provincial distribution of Brazilian tourist arrivals in South Africa, 2024

- In 2024, the Western Cape ranked second as the province of choice for Brazilian visitors in South Africa, as can be seen in Figure 2.

Figure 2: Provincial distribution of Brazilian tourist arrivals in South Africa, 2024



Top 5 attractions visited in the Western Cape:

V&A Waterfront
Cape Point
Table Mountain Aerial Cableway
Camps Bay
Table Mountain National Park: Boulders

Source: South African Tourism (2025)

4.4 Brazilian traveller trends

Table 1 shows that in 2024, the Western Cape experienced a notable increase in tourist arrivals from Brazil, with a remarkable growth rate of 159.7%. This surge resulted in a total of 29,401 visitors from Brazil, significantly surpassing the 11,319 arrivals recorded in the previous year (2023).

In 2024, this market contributed a total of R451 million in foreign direct spend to the Western Cape's economy, with an average spend of R16,700 per tourist. The number of bed nights totaled 324,970 in 2024, resulting in an average length of stay of 11.4 nights. These details can be seen in Figures 3 and 4.

The increase in total foreign direct spend, bed nights, and length of stay highlights the diverse opportunities available for tourism-related businesses and services and the positive ripple effects it creates throughout the provincial economy, potentially leading to job creation and improved services for residents in the Western Cape.

Figure 3: Tourist arrivals and length of stay in South Africa and the Western Cape, 2019–2024

	Tourist Arrivals in SA	Tourist Arrivals in WC	WC % Share of SA Arrivals	LOS in SA	LOS in WC
2019	77,261	36,350	47.0%	17.0 nights	21.6 nights
2020	19,388	13,271	68.4%	16.6 nights	18.5 nights
2021	5,366	2,862	53.3%	20.8 nights	20.8 nights
2022	14,727	5,303	36.0%	17.9 nights	25.4 nights
2023	25,672	11,319	44.1%	16.1 nights	10.7 nights
2024	49,855	29,401	59.0%	14.5 nights	11.4 nights

Figure 4: Brazil TFDS, average spend, and bed nights in the Western Cape, 2019–2024

	TFDS in WC	WC % Share of SA TFDS	Avg. Spend in WC	WC % Share of SA Avg. Spend	Bed Nights in WC	WC % Share of SA Bed Nights
2022	113mn	28.6%	R26,200	84.8%	74,100	32.5%
2023	205mn	31.3%	R20,600	70.5%	116,946	31.0%
2024	451mn	43.0%	R16,700	72.3%	324,970	47.3%

SA – South Africa
WC – Western Cape
LOS – Length of Stay
Avg. – Average
TFDS – Total Foreign Direct Spend

Source: South Africa Tourism (2025)

4.5 CPT International schedule
IATA summer 2025 (Apr – Oct)

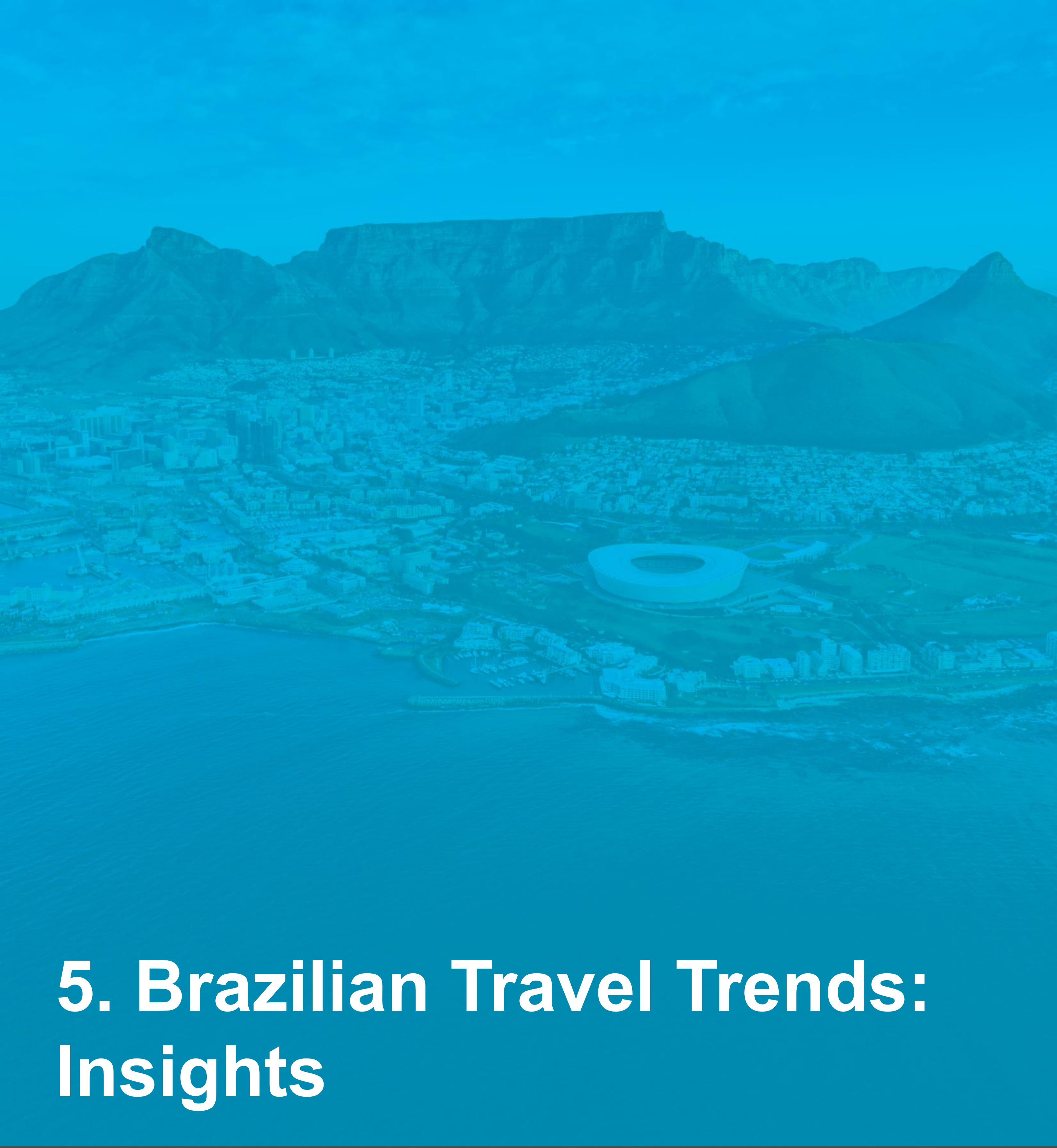
North & South America

DELTA AIR LINES	**Delta Air Lines**	Atlanta (ATL) | 3x per week* **5x per week starting end October 2025*
UNITED	**United Airlines**	Newark (EWR) | 3x per week* Washington D.C. (IAD) | 3x per week **4x per week starting end October 2025*
SOUTH AFRICAN AIRWAYS	**South African Airways**	São Paulo (GRU) | 2x per week

Source: Milanamos

** CPT International – Cape Town International*

Source: Cape Town Air Access Powered by Wesgro (2025)



5. Brazilian Travel Trends: Insights

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5.1 Euromonitor International Consumer Statistics

Consumer data and insights presented in this section are sourced from the Voice of the Consumer: Travel Survey (Euromonitor International, 2024). The voice of the consumer: travel survey explores the trends that influence consumer's travel habits, personal traits, and decision making when travelling.

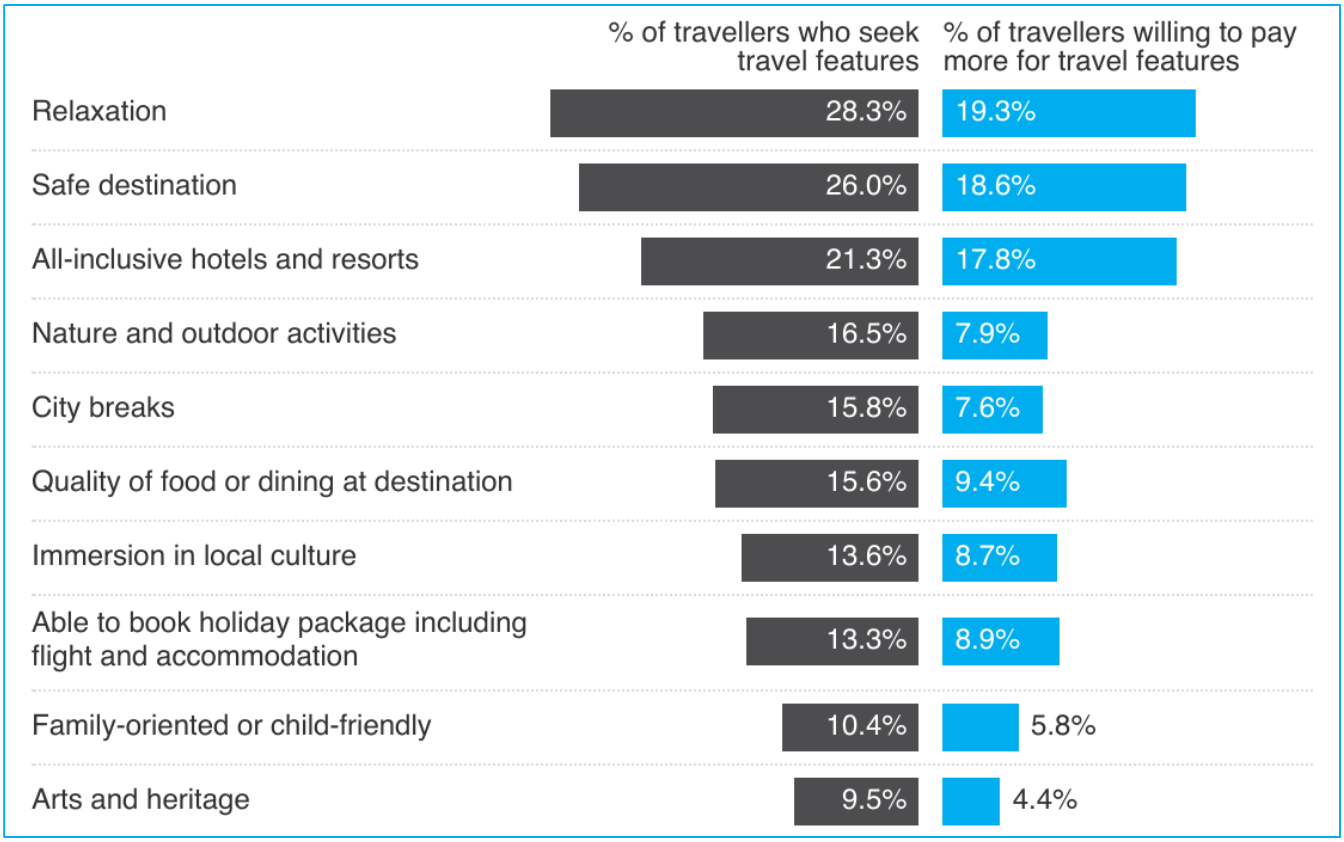
5.2 What Brazilian travellers seek in a destination

Looking at the destination features (see Figure 5) sought by Brazilian travellers when planning future vacations and travellers' willingness to pay more for travel features when booking their trips, three salient features emerge: relaxation, the assurance of a safe destination, and the availability of all-inclusive hotels and resorts. These factors collectively underscore the importance of comfort and security in the traveller's decision-making process for this market.

Relaxation is not merely a luxury for these travellers; it is an essential aspect influencing their destination choice. In addition, the emphasis on safety reflects a broader trend among global travellers, who prioritise security in an increasingly complex world. Finally, the attraction of all-inclusive accommodations speaks to a desire for convenience and value, as travellers seek to simplify their experiences while ensuring that their needs are met in a singular offering.

Together, these three features significantly influence the preferences of Brazilian travellers, shaping their vacation choices and the types of experiences they seek.

Figure 5: Top 10 most important destination features, 2024



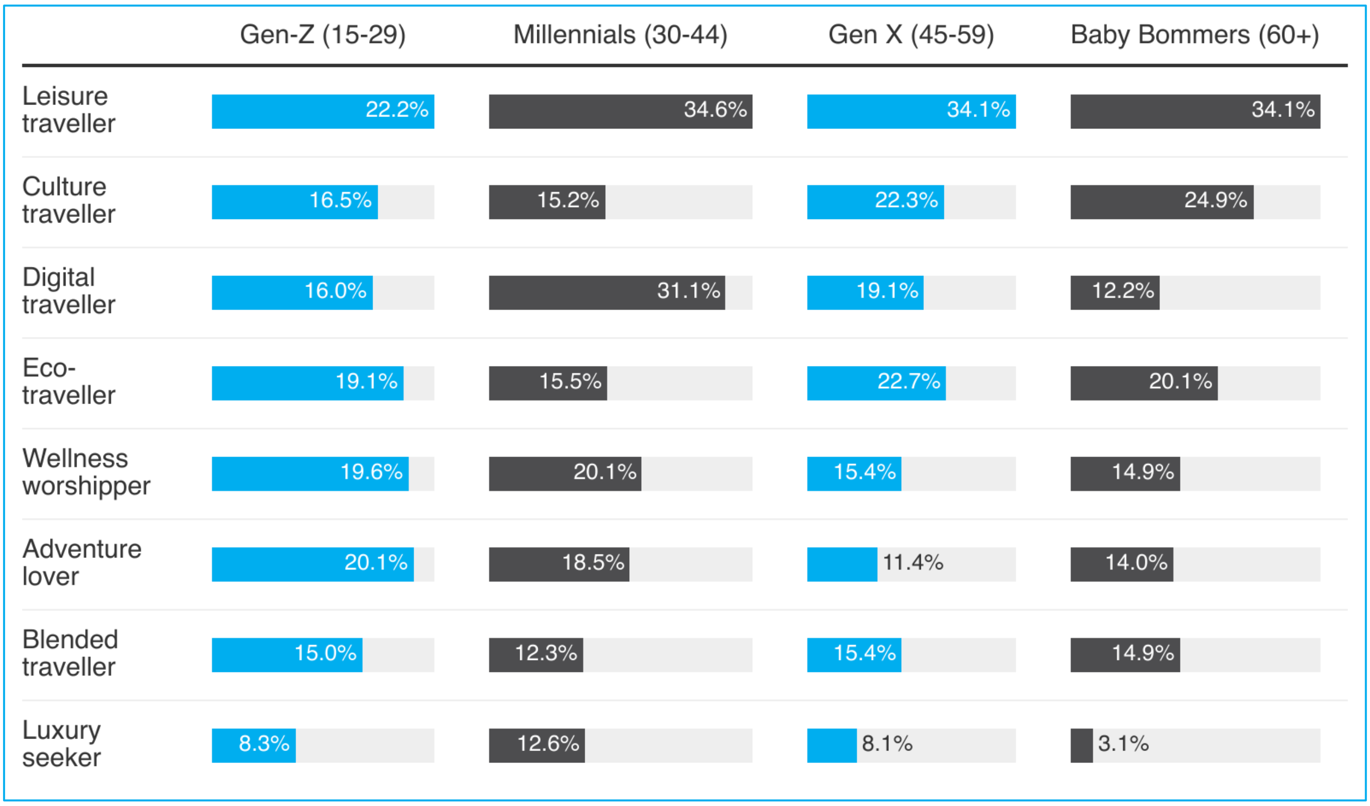
Source: Euromonitor International, Voice of the Travel Consumer Survey (2024)

5.3 Trends among different generations of Brazilian travellers

The analysis of outbound travel trends in Brazil shows that the leisure segment will be the main driver of air travel from 2025E to 2029(F). The insights in Figure 6 provide details about other important travel preferences that Brazilian travellers consider, across different generations.

- **Millennials** are the largest group when it comes to digital travellers, emphasising their reliance on technology for travel planning and experiences.
- **Baby boomers** constitute the largest group who are defined as 'cultural travellers', demonstrating a strong inclination toward cultural experiences and heritage exploration.
- **Generation X** leads as eco-travellers, reflecting an increasing awareness and commitment to sustainable travel practices.
- **Generation Z** emerges as the largest group of adventure enthusiasts, showcasing a preference for thrilling and experiential travel opportunities.

Figure 6: Brazilian traveller trends for different generations, 2024



Source: Euromonitor International, Voice of the Travel Consumer Survey (2024)

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