
An overview of contemporary tourism development in Brazil

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Abstract

Tourism in South America has been largely overlooked compared to other tourism developing regions such as Asia and Africa. Decades of political and economic uncertainty have directly influenced tourism development in the region and explain tourism's current state. Despite its dimension, diversity and attractiveness, Brazil has only recently recognized the tourism industry as a promoter of economic and social development. Recent trends in the tourism industry in Brazil clearly illustrate the correlation between economic and political stability and development in tourism. This paper discusses the major issues that have influenced and shaped tourism in Brazil and addresses the major developments in the last decade and the future perspectives for the industry.

Introduction

The recent celebration of Brazil's 500th anniversary served to highlight how travel has played an important part in the country's heritage and conquests. Newly published material (books, essays, films, documentaries, etc.) for the 500-year festivities have accounted for new facts, challenging previously held assumptions and, particularly for tourism scholars and professionals, have presented an enormous wealth of information about travel in early colonial days. Detailed accounts of the early settlers' travels into the interior of the country, including routes, postings, services, hazards, challenges faced by the "conquistadores", etc., illustrate how important travel infrastructure was for the country's development and achievements. Contrary to popular belief, therefore, travel and tourism are not new phenomena in the country.

Although Brazil is not a tourism-dependent country, this activity represents one of the most important sectors for the Brazilian economy and its importance for the country's development is increasing year by year. This paper strives to examine contemporary tourism in Brazil. It commences by contextualising Brazilian tourism development within South America. A discussion of some of the elements that have contributed to shaping tourism in the region is followed by an overview of major tourism developments in Brazil in the last decade. The paper concludes with a discussion of the main challenges and future perspectives for tourism in the country.

Tourism in South America

For most South American countries tourism represents unrealised developmental

potential. Only recently has it attracted the attention of policy-makers as it has the potential to contribute towards alleviating the major political, social, and economic problems that characterize the region. In an effort to raise their general level of prosperity, some nations have embraced tourism as a strategic alternative. In fact, in countries such as Brazil (see Figure 1), Chile and Argentina, tourism has taken a new dimension in recent years, contributing significantly to those country's balances of payments and providing millions of jobs.

The major structural changes experienced by most Latin American countries in the 1990s, such as the transition to democracy in many previously oppressed countries, the consolidation of economic blocs, the improvement in trade with major markets around the world and the improvement in basic services such as health and education, among others, have contributed positively to the development of tourism in the region and the sector has emerged as an important promoter of economic development. Indeed, the World Travel and Tourism Council – WTTC (1999) predicts regional travel and tourism GDP growth of 6.1 per cent per annum for this decade, which is double the world average. The same report predicts even higher rates for Argentina, Chile, and Venezuela. By the year 2010, travel and tourism in Latin America are expected to produce US\$347.1 billion worth of economic activity and 15.3 million jobs (WTTC, 1998). These prospects were unimaginable a few decades ago, when South America was submerged in regional disputes, chronic economic problems and major social problems and was ruled mainly by dictatorial or military regimes.

If measured by its economic impacts, tourism in South America is a relatively recent phenomena, making its major contribution after the Second World War. However, some limiting factors, such as the great distance from the most important



Figure 1
Brazil in South America



generating markets and a lack of resources for investment in tourism infrastructure, have compromised growth and expansion. The fact that most economies in the region were weak and suffered from prolonged recessions has also influenced the development of regional and intra-regional travel.

As a reflection of the political, economic and social situation in the region, the performance of the industry in the 1960s was mediocre, despite the tourism boom experienced elsewhere. This depressing period was further aggravated in the 1970s by serious social and political disputes. Armed conflict, guerrilla warfare, military coups, social tension, terrorism, natural disasters and health-related issues characterised the 1970s and have all contributed to creating a reputation that still causes many generating countries to define South America as a region of political and economic instability to which it is relatively unsafe to travel. The overall consequences of these contextual issues were low investment in tourism and decreasing interest in the international tourism market in the region.

Increasing internal and external debts, hyperinflation and social and political uncertainties in the 1980s, have all helped to guarantee that both tourists and tourism investment remain out of the region. However, towards the end of the decade major changes, such as the process of democratisation and economic reforms, struck major regional players, especially Brazil, Argentina, and

Chile. The reforms implemented in this period have positively influenced neighbouring countries and have paved the way for a more promising tourism industry. The 1990s marked the beginning of the slow and fragile process of major reforms in the South American context, which were decisive for the improvement of tourism in the region.

The economic importance of tourism for South America

Although not as significant as in other regions of the Americas, such as the Caribbean, the overall importance of tourism in services in South America cannot be underestimated. In 1997 tourism represented 53 per cent of total receipts in services and tourism receipts as a percentage of exports was 9.16 per cent (WTO, 1999a, p. 48). According to the World Tourism Organization (WTO, 1999a) the region received 15.868 million tourists in 1997. A comparative analysis with 1992 data (when 10.423 million international tourists visited South America) (WTO, 1994) suggests an increase of about 50 per cent in the number of arrivals.

Despite the geographical concentration of tourist arrivals in just a few countries of the Americas in 1997 (the USA, Canada, and Mexico received almost 72 per cent of all arrivals in the region), tourism seems to be increasing consistently in South America, demonstrating overall positive results in both arrivals and receipts. Compared to 1996, for example, total arrivals in 1997 rose 7.9 per cent and receipts increased by 8.3 per cent, reaching over US\$13.5 billion (WTO, 1999a). In 1998, South American destinations overtook, for the first time, those of the Caribbean in terms of arrivals (WTO, 1999b). More recent data suggest that tourism in South America increased by 10 per cent in 1999 (WTO, 2000).

Intra-regional travel represents by far the greater proportion of international arrivals in the region. One reason for that might be the associated high costs and time involved to reach South America from the major generating countries. Intra-regional travel grew at an average of 4.1 per cent in the period 1988-1997 (WTO, 1998, pp. 34-5) and was responsible for three-quarters of tourist arrivals in the Americas in 1997 (which reached over 87 million arrivals).

Tourism in Brazil - an overview of recent developments

Despite the fact that Brazil is the largest country in South America and has a wealth of cultural and ecological diversity, tourism

has been largely overlooked by both policy makers and the private sector. As a consequence, it has until very recently played a mediocre role in terms of economic and social contribution to the nation, compared to its neighbouring countries. For instance, Uruguay used to receive more international tourists than Brazil, and Argentina received twice as many tourists as Brazil. This situation began to reverse only in 1997 when Brazil gained three positions on the ranking of the America's top 20 destinations, moving to sixth position. In 1990 Brazil used to occupy the ninth position. Table I shows the changes in terms of tourist arrivals in South America at two periods in the 1990s.

Compared to 1996, the number of tourist arrivals in Brazil increased by 6.9 per cent, to 2.8 million international tourist arrivals (WTO, 1999a, pp. 50-51) and receipts for the same period improved by 5.1 per cent (WTO, 1999a, p. 57). In 1998 Brazil experienced an unprecedented 10 per cent increase in the number of arrivals (WTO, 1999b). It is interesting to observe the context in which these changes took place. In fact, the Brazilian example clearly illustrates the correlation between economic and political development and changes in tourism. The major structural changes implemented in the country in the mid-1990s reversed the trend of obscurity in which tourism was submerged. The several years of military regimes (1964-1985), decades of poor economic policies and high level of corruption in governmental institutions, meant that none of the required conditions for tourism to prosper were available. The economic reforms implemented in 1994 paved the way

Table I

Tourist arrivals for South America for the years 1992 and 1997

Country	1992 arrivals ('000s)	1997 arrivals ('000s)
Argentina	3,031	4,540
Bolivia	245	355
Brazil	1,475	2,850
Chile	1,283	1,644
Colombia	1,076	1,544
Ecuador	403	525
Guyana	93	76
Paraguay	334	395
Peru	217	747
Surinam	30	61
Uruguay	1,802	2,317
Venezuela	434	814
South America	10,423	15,868

Source: Adapted from WTO, 1994; 1999a

for the implementation of national tourism programmes that have since changed the face of tourism in the country. Control of inflation, which once reached 80 per cent a month, was of fundamental importance to regain both the public and investors' confidence in the future prospects of the nation. The fragile but steady improvements in the economic arena, which were confirmed by the good economic performance during the Asian and Russian crises, sent a positive message to both institutional and private investors. Investment in tourism infrastructure and tourism products has increased considerably since then. Proactive and specific tourism policies by the Federal Government were also decisive in this process. The implementation of the Política Nacional do Turismo (PNT) – Diretrizes e Programas – 1996-1999 (National Tourism Policy – Directives and Programs – 1996-1999), under the former Ministry of Industry, Commerce and Tourism – EMBRATUR (Instituto Brasileiro do Turismo), was critical for the new phase of prosperity and development of tourism in Brazil. More recently, tourism has also been formally recognized as a promoter of social and economic development and has been legitimized with the introduction of the Ministry of Sports and Tourism.

Domestic tourism

Supported by a strong currency, Brazilians began travelling abroad and internally in great numbers. Indeed, by 1998 most tourism indicators had experienced unprecedented growth. The deregulation of air transport helped to raise domestic travel to record levels. In 1998 the number of air passengers increased by 25 per cent. According to Breitingner (1999, p. 54) 17 per cent of those passengers had never travelled by air before. Domestic travel increased by 43 per cent over 1997, when 38.2 million Brazilians (nearly a quarter of the population) travelled within the country (Carvalho, 1999, p. 5). In the same period package tours alone increased by 26 per cent. Although domestic travel is still highly seasonal, with over 70 per cent of all trips taking place in the high season, the contribution to overall tourism receipts in 1998 was significant, with over US\$6 billion. This represents approximately 1.48 per cent of the country's GDP (EMBRATUR, 1999a, p. 218).

Even though Brazil is a country of continental dimensions, airlines play a relatively small role in domestic tourism. According to EMBRATUR (1999a), the preferred means of travel is by road. Bus travel accounted for 50 per cent of all trips,

followed by private motor cars (19 per cent). One interesting observation was that hitch-hiking accounted for an impressive 11.8 per cent of all domestic modes of travel (EMBRATUR 1999a, p. 211). It is hardly surprising then, that organized travel plays a limited role in the tourism industry as a whole. In fact, in 1998 only 5 per cent of all trips were organized (EMBRATUR, 1999a, p. 213).

In 1998 the main purpose of travel, 77 per cent, was for leisure (EMBRATUR, 1999a, p. 213) and, when away, Brazilians stayed on average 11.7 days at their destinations and spent on average US\$290 per trip. The variables “stay” and “expenditure” in domestic tourism are strongly influenced by income. Classes ABC spent, on average, more than twice (US\$388) the amount spent by classes DE travellers per trip (US\$152). With respect to length of time spent on holidays, classes DE stayed on average 12.9 days when away while those of the upper classes (ABC) spent only ten days (EMBRATUR, 1999a, p. 210). Another interesting fact is that only 11.5 per cent of all domestic tourists used hotels in 1998. Most Brazilians stayed with friends and relatives (over 73 per cent). However, it has been observed that the demand for hotel accommodation from those belonging to income classes ABC has been increasing over the last few years (EMBRATUR, 1999a, p. 211; FADE-EMBRATUR, 1998).

International tourism

According to EMBRATUR (1999b), more than 4.8 million tourists visited Brazil in 1998, generating more than US\$3.7 billion in tourism receipts. In terms of exports, tourism was second only to soya, surpassing traditional export products such as iron and other minerals, coffee and sugar. The preferred destination for foreign tourists is still Rio de Janeiro. In 1999 it received 32.5 per cent of all international tourists. However, other destinations within the country, such as the Amazon and the Pantanal, are increasingly attracting more and more tourists. Given its proximity to Argentina and Paraguay, Florianópolis received 17.7 per cent of the total number of international tourists in 1999, followed by São Paulo with 13.7 per cent. While in Brazil, the great majority of tourists stay at hotels, 80 per cent in 1998 and 73.5 per cent in 1999 (EMBRATUR, 1999c, p. 13). Not surprisingly, the vast majority of international visitors revealed that their main reason for tourism was to experience Brazil, 71.8 per cent in 1998 and 77.6 per cent in 1999. The second most important motivation was business with 22.7

per cent in 1998 and 18 per cent in 1999 (EMBRATUR, 1999c, p. 10). Another interesting observation is that repeated visits play a major role in the overall number of international tourists. In fact, only 36.7 per cent of tourists were visiting the country for the first time. Research conducted by EMBRATUR (1999c, p. 17), revealed that 91.1 per cent of tourists have indicated that they intend to return. The general intention trend between 1995-1999 has been a positive one of 89 per cent. When in Brazil, visitors stayed on average 14 days and their expenditure per day was approximately US\$80 in 1999 (EMBRATUR, 1999c, p. 10).

The economic stability and strong currency have also made it possible for Brazilians to travel abroad. In 1997 Brazil experienced an unprecedented tourism deficit that destabilized the country's balance of payments. More than four million Brazilians went abroad compared to 2.9 million international arrivals (*Brasilturis Jornal*, 1998, p. 4). According to EMBRATUR (1999b, p. 177) the deficit was in the order of US\$3.9 billion. Other variables also contributed to the travel deficit. Brazilians are among the highest spenders in the world. According to the ITA – Tourism Industry (21 March 2000), from 1992 to 1997 the Brazilian travel market to the USA outperformed Japan, the UK and France in terms of visitor growth. Brazilians have also outspent all other overseas markets by at least 28 per cent (per trip), outspending Japanese travellers, who are generally regarded as up-market travellers. Brazil became the fifth-largest overseas market to the USA in 1997, when 941,000 Brazilians visited that country. Even more impressive, though, was the more than US\$3 billion spent by Brazilians in the USA. Indeed, Pinheiro (1998, p. 33) stated that Brazilians spent on average US\$2,373 while visiting the USA in 1997. This is considerably more than the average Japanese or German tourists spent on their trips. Also, this is in clear contrast to the average expenditure of about US\$1,560 of US visitors to Brazil, the US\$1,754 spent by Germans, or the US\$1,874 that Italians spent in Brazil (EMBRATUR, 1999b, p. 159). Altogether, domestic and international tourism contributed over US\$18 billion to the Brazilian economy, or 3.4 per cent of the nation's GDP (EMBRATUR, 1999a, p. 219).

Tourism infrastructure and recent national policies

One of the most important inhibiting tourism factors in Brazil is the lack of basic and

tourism infrastructure. Indeed, data from foreign tourists gathered by the Brazilian Government clearly identifies a number of inadequacies. The complaints range from the most basic issues, such as a lack of tourist information, to more contextual ones, such as traffic congestion and noise. Among other aspects, tourists are not satisfied with the standards of airport facilities, the lack of public toilets and the hygiene of existing ones, the high cost of air tickets, the lack of good road networks and connections, concerns about safety, tourist exploitation, and so on. There is no doubt that these issues have been hampering tourist satisfaction and spending in the country.

As Brazil is a developing nation, with enormous social problems, there are a series of other priorities, other than tourism, that head the governmental agenda, such as health, education, and security. It is true that tourism will benefit from investment and development in these areas. However, tourism is an activity that relies on a number of services, many of them usually provided or controlled by the public sector such as public utilities and, in some cases, transport and finance-related services. As mentioned previously, the Government has taken a new stand in relation to tourism and has implemented a series of tourism policies that have been changing the face of the industry over the last five years.

With the introduction of the PNT (National Tourism Policy), Brazil has for the first time a clear national policy for tourism, which had as macro strategies: the planning, development, and promotion of tourism through the articulation of the government and the private sector; the implementation of basic and tourism infrastructure; the training of human resources in tourism in general; and the decentralization and modernization of tourism administration. By 1998 the positive results could be felt in many areas:

- the number of international visitors doubled in the period 1994-1998, from 1.8 million to over 4.8 million tourists (EMBRATUR, 1999b, p. 13);
- tourist receipts nearly doubled in the same period, from US\$1.9 in 1994 to US\$3.7 in 1998 (EMBRATUR, 1999b, p. 177);
- total investment in tourism is expected to reach US\$5.5 billion by the end of 2000 (EMBRATUR, 1999d);
- the Plano Nacional de Municipalização do Turismo – PNMT (National Tourism Municipalization Plan) has trained thousands of agents who will eventually disseminate and multiply the skills and knowledge in their communities;

- a substantial increase in domestic tourism;
- an improvement of the country's image in major international tourist markets.

EMBRATUR has set new goals for the Brazilian tourism industry. Among others, it intends to modernize and adapt the directives and goals of the PNT; create more opportunities for investment in tourism; continue and improve the programme of human resources training; continue the process of tourism decentralization; improve the level of investment in basic and tourism infrastructure; introduce new methodologies for tourism analysis in the country; increase marketing and promotion budgets and consolidate the Consumer Protection Act for tourists (EMBRATUR, 1999d).

The Government has also introduced a tourism investment programme (PRODETUR “Projeto para o Desenvolvimento do Turismo” (“Tourism Development Project”)), which facilitates and encourages investment in tourism. Apart from direct federal and state investments and credit lines, international institutions, such as the Inter-American Development Bank (IDB) are participating in the various investment programmes. The programme was designed to improve existing tourism facilities and expand infrastructure as well as to provide basic infrastructure for tourism development in areas considered to have tourism potential. For the Northeast of the country PRODETUR received US\$670 million from the Inter-American Development Bank (IDB) for the first phase of PRODETUR, from 1995 to 1999. In general the investments were spent on improving and modernizing airport facilities, paving thousands of kilometres of highways, restoring historical buildings and protecting the environment, among others. The second round of investment by PRODETUR, from 1999 to 2004, will benefit other regions of the country as well as the Northeast. The Northeast is expected to benefit from over US\$600 million. The Amazon will receive US\$212 million for basic infrastructure, while US\$450 million will be invested in the Pantanal (Wetlands Region), also for infrastructure. For the Southern part of the country US\$464 million will be allocated through the PRODETUR SUL. Private investment alone in the country reached over US\$6 billion in 1999 (Schneider, 1999, p. 13).

The main beneficiaries of investment have been the accommodation and entertainment sectors. At the beginning of 2000, more than 300 hotels and ten new theme parks were under construction across the country. In

1997 Brazil had over 18,000 hotel establishments, with an average of 59 hotel rooms per hotel. Investment from both private and institutional sources in the hotel sector has since reached record levels and the accommodation capacity is expanding rapidly. More than 60 hotels were under construction in 1998 by the Accor Group alone. Altogether, more than 200 hotels were built in 1998. Total investment in the sector has reached US\$76 billion (FADE-EMBRATUR, 1998, p. 76). The number of hotel rooms in the city of São Paulo received a boost of 10,000 new rooms in 1998. As a result of the economic stability and the significant increase in both domestic and international tourism, the overall hotel occupancy rate in Brazil increased from 47 per cent in 1993 to 59.3 per cent in 1996 and 67 per cent in 1997 (FADE-EMBRATUR, 1998, p. 64; Horwath Consulting/Soteconti, 1998, p. 3). The new economic conditions and the increase in both domestic and international tourism have attracted the attention of international hotel chains and today most of the major international hotel chains are present in the country.

Challenges and future perspectives for tourism in Brazil

There is no doubt that tourism already plays a major role in the Brazilian economy and that it also presents an alternative for development. However, the legacy of many decades of inappropriate policies has placed the nation in an unfavourable position for competing both regionally and internationally in the tourism market. Contrary to the choice made by many countries in Asia, Brazil has adopted inward-investment strategies. It is now suffering the consequences of its choice, which inevitably affects tourism development. This choice has contributed to creating inefficiency in all productive sectors. It has generated bureaucratic systems, allowed corruption to flourish, increased international debt and among other negative effects, has also widened the social gap between rich and poor. As a consequence the country has endured prolonged economic instability, hyperinflation, increased unemployment, sharp increases in external and internal debt, political instability, civil unrest, and so forth. Although macro economic indicators have been relatively positive in the last five years, income distribution has been poor. In fact, Brazil has one of the worst records of income distribution in the world. Even though this analysis is clearly an over-simplification of

the facts, it does help, nevertheless, to illustrate how this process has dictated tourism development in the country and goes some way towards explaining tourism's present state.

As an emerging destination Brazil needs governmental commitment if it is to achieve the structure required to compete on a global scale. The competition, both regionally and globally, is intensifying and is based not only on attractiveness and diversification but also on service quality, infrastructure and innovation. Without public support few of these can be achieved. Therefore, the federal and state governments should be involved in building the nation's infrastructure and capacity as well as in the provision of training and education for tourism, market research, promotion campaigns and other issues that promote tourism.

It is clear that the industry is still in its infancy in Brazil and it represents an enormous unrealised potential. The country's cultural and natural diversity is extremely rich and needs to be orderly explored in an orderly manner to avoid the negative impacts of tourism. The tropical climate provides a natural setting for nature-based tourism in the whole of the national territory. Moreover, Brazil has a hospitable population, the Amazon Rainforest, diverse and unique cultures, thousands of miles of unspoiled beaches, the largest wetlands in the world, mountains, and so on. All this suggests that the country can play a more significant role in the world scenario. For this to become a reality, a tourism culture must be developed, a culture that will foster investment and innovation and will be guided by the philosophy of sustainability.

Conclusion

There is enough evidence to support the view that tourism will continue to grow in Brazil well into the twenty-first century. The major recent structural changes, such as the introduction and consolidation of democracy and improvement in economic factors, have all contributed towards creating the right conditions for tourism to flourish. Both arrivals and receipts have been consistently increasing in the last few years and tourism now represents an important contribution to the country's GDP as well as being a major source of employment. Intra-regional tourism is likely to strengthen its participation in the Brazilian tourism industry in terms of both arrivals and contribution to receipts. Long-haul tourism is not expected to change dramatically in the foreseeable future, as it

demands changes in terms of investment pattern and organization.

Having said that, the future prosperity of tourism still depends on advances in many areas such as improving service quality (training and education), decentralization of tourism, deregulation, improvement of security and safety, and the privatisation of basic services. More importantly, perhaps, is the creation of a strong tourism culture, a culture that will foster and promote innovation so as to create and maintain a sustainable competitive advantage. Even though there are enormous demands on government resources, and considering the many social problems, tourism is slowly becoming part of the governmental agenda.

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