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IN RESPONSE TO A REQUEST FROM THE GOVERNMENT OF BRAZIL THE GOVERNMENT OF THE UNITED STATES ENTERED INTO AN INTER-GOVERNMENTAL AGREEMENT TO PROVIDE THE SERVICES OF TWO PROFESSIONAL CONSULTANTS TO GIVE TECHNICAL ADVICE TO THE CONSELHO DE TURISMO DA CONFEDERAÇÃO NACIONAL DO COMÉRCIO IN CONNECTION WITH THE BRAZILIAN GOVERNMENT'S INTEREST IN INCREASING TOURIST TRAVEL TO BRAZIL.

THIS REPORT REPRESENTS THE PROFESSIONAL AND TECHNICAL VIEWS OF THE EXPERTS ON THE QUESTIONS CONNECTED WITH DEVELOPING AN INCREASED FLOW OF TOURISTS TO BRAZIL.

IT IS EMPHASIZED THAT THE DATA AND RECOMMENDATIONS CONTAINED IN THIS REPORT ARE STRICTLY TECHNICAL IN CHARACTER AND DO NOT REPRESENT THE OFFICIAL VIEWS OF EITHER THE CONFEDERAÇÃO NACIONAL DO COMÉRCIO (DESIGNATED BY THE GOVERNMENT OF BRAZIL) OR THE GOVERNMENT OF THE UNITED STATES. THE APPLICABILITY OF THESE TECHNICAL RECOMMENDATIONS OF COURSE DEPENDS UPON MANY FACTORS WHICH ARE OUTSIDE THE TERMS OF REFERENCE RELATING TO THIS REPORT.

A. I. D. HISTORICAL AND
TECHNICAL REFERENCE
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PA-ABP-068

A STUDY OF THE
BRAZILIAN TOURISM POTENTIAL

BOOK I

INTERNAL CONDITIONS

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INTRODUCTION

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I N T R O D U C T I O N

This study was conducted in accordance with the terms of a contract between the International Cooperation Administration of the United States Government and McCann-Erickson, Inc., in which the latter agreed to furnish technical assistance in surveying the tourism potential of Brazil. This technical cooperation project was undertaken at the request of the Brazilian Government. The work of planning and organizing the survey was done in close cooperation with the Conselho de Turismo da Confederacao Nacional do Comercio, which was designated for the project by the Brazilian Minister of Foreign Affairs.

Objectives and Scope

General objectives of the project are to recommend ways and means to increase tourist travel from the United States of America to Brazil.

The short-term objective aims at the immediate increase of tourist travel to Brazil under existing facilities and conditions.

The long-range objective is pointed to the full scale development of tourist resources, attractions and facilities within Brazil in proper relationship to the overall economic development needs of the country.

Methods Used

The survey was conducted by means of personal examination of current and projected tourist attractions, facilities and conditions in Brazil.

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Specially prepared questionnaires were used in key cities, wherever feasible, to get detailed information on the status of hotels, transportation means, travel agent services, guided tour operations and souvenir selling practices.

The examination and analysis of resulting data were done by two representatives of McCann-Erickson, Inc., specialists in the field of international travel, and three representatives of the Conselho de Turismo, each of whom has had considerable experience with tourism in Brazil.

The decision as to which of the existing resources or facilities should be visited was determined largely on the advice of the Conselho de Turismo, based on their intimate knowledge of internal conditions in Brazil. Itineraries were established and reviewed with the United States Operation Mission to Brazil. The Confederacao Nacional do Comercio undertook responsibility for all transportation and accommodation arrangements.

During the course of the survey, approximately 9,000 miles were traveled by air in Brazil and each of the major Brazilian air carriers was used at least once. About 2,700 miles were traveled on the ground, mainly by automobile. Survey team members were guests in 19 different hotels throughout Brazil, and made personal inspections of some 50 others. More than 25,000 words of detailed notes were taken, covering all of the places visited and conferences held with travel people.

In the places visited, the determination of specific resources and attractions to be surveyed was based primarily on the advice of the local Federation of Commerce, and in some cases on suggestions made by the state

and municipal tourism departments. Cooperation of these groups was also enlisted for arranging local transportation and meetings with officials and private organizations.

Study Philosophy

The scope of this study is limited to appraising Brazil's tourism potential and recommending what must be done to fully capitalize on it, both internally and externally. It does not include an analysis of the economic benefits which might be derived from tourism investment as compared with investment in other sectors of the economy, which is, in the final analysis, a matter of Brazilian determination. Hence, any recommendations for tourism development programs made in this report must be related to the overall economic development needs of the country.

The main purpose of the report is to provide the framework for a tourist development program, the adoption and implementation of which is solely in the hands of Brazil. The adaptability of the program to the Brazilian milieu, and its final success, rests with the resourcefulness of the Brazilians. This type of consultative relationship is typical of U.S. technical cooperation projects.

In the analysis of facts and development of recommendations, an attempt was made to be completely impartial and objective. Statements in the report which may appear to be critical of any part of Brazilian life are intended only to be constructive in terms of maintaining objectivity and satisfying the end purposes of the survey. It is in this spirit that the entire project was executed.

This survey would not have been possible of success without active cooperation from the Conselho de Turismo da Confederacao Nacional do Comercio, the collaboration of the local Federations of Commerce, tourism associations and the participation of segments of Brazilian government, commerce and industry. Appreciation and gratitude is expressed to the many individuals who gave generously of their time and effort.

Report Organization

This report is contained in two books. Book I deals with Brazil's internal tourism conditions - assets, problems and recommended development needs. Book II outlines the international travel situation and recommends a program of total communications to be carried out in the United States over a period of three years - advertising, sales development and public relations, with proposals for additional research on American attitudes about Brazil. (An appendix to Book I contains samples of questionnaires used, a list of the places surveyed, and other pertinent data.)

BOOK I RESUME

1. Brazil's tourism advantages can be summarized as: a country with different or unique characteristics and background; hospitable, friendly people; generally favorable climate; beautiful scenery; cost savings; folklore and festive events; world's newest capital; hunting and fishing; gem stone souvenirs; faster ships and upcoming international commercial jet transportation.
2. Some attempts have been made to capitalize on these advantages, but certain fundamental problems have contributed to Brazil's relatively small participation in the U.S. overseas travel market, and have been obstacles to the growth of tourism.
3. Some of the internal tourist conditions, in varying degrees, are necessarily related to the overall economic development of the country. Principal problems center around hotels, language barriers, transportation, sanitation, customs and entry regulations, guided tours and sports facilities.
4. Improvement of internal conditions, i.e. the creation of a modern "visitor plant" to provide the goods and services enjoyed by Americans, deserves first priority in the touristic perspective.
5. Certain places with tourist appeal are more capable than others of relatively quick upgrading to meet the goals of expanded tourism. Despite attendant difficulties, these places have more to offer the American

tourist today: Rio de Janeiro and environs, Sao Paulo area; Bahia; Iguacu; Ouro Preto; Manaus; Caxambú, Araxa, Poços de Caldas; Porto Alegre, Samuara Resort. The initial exploitation effort should focus on the immediate development of these places, consistent with the overall economic needs of the country.

6. The expanded program aims at the actions necessary to bring other tourist attractions up to international standards, plus the steady upgrading of those places selected for initial development, as the infrastructure of the economy is strengthened.
7. There are three prime considerations in the implementation of Brazil's tourist development program: tourism management - creation of an officially sanctioned national tourism body; tourism machinery - integration of capital, facilities and labor; tourism mentality - an internal program to educate tourist interests and the general public to an understanding of tourism benefits.
8. Tourism has deep significance for the peoples of the modern world, because the benefits of travel can contribute to the cause of peace through improvement not only in terms of economic advancement but with respect to the political, cultural and social relationships of nations as well.

SECTION I

EVALUATING BRAZIL'S TOURISM POTENTIAL

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I. EVALUATING BRAZIL'S TOURISM POTENTIAL

An analysis of the general situation with regard to tourism potential for Brazil will be covered in this section. There is an explanation of the things to which the American tourist is sensible and which can contribute to or detract from his enjoyment of the places he visits. Also will be found a specific appraisal of each of the places surveyed.

A. BRAZIL'S TOURISM ADVANTAGES

1. Different or Unique Characteristics and Backgrounds

- . Contrast in living habits - from primitive conditions of the interior to cosmopolitan life in large cities; North-South regional differences.
- . Backgrounds of different ethnic cultures and European backgrounds, and the carry-over of certain customs and traditions therefrom.
- . Fourth largest country in the world, holding half the population of South America.
- . A reputation for political stability as compared to other South American countries, with a constitutional government styled after that of the United States.
- . Only Latin American country with Portuguese as its native tongue.

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- . Heritages and traditions passed on from Portugal, which have had strong cultural influences.

2. Hospitable, Friendly People

Brazilians know how to relax, and have a natural courtesy and friendliness which most Americans would find appealing. A liking for foreigners seems to be an integral part of their personality. This attitude of cordial acceptance can serve advantageously in making the tourist feel welcome and "at home."

3. Generally Favorable Climate

From Recife south to Rio de Janeiro, the mean temperature ranges from 78° to 73° along the coast, from 64° to 70° in the Highlands, down to 66° at the southern boundary. Few places get more than 80 inches of rainfall annually, the coast north of Belem, some of the Amazon Basin and a small area of the Serra do Mar. (A temperature and rainfall chart for major cities of Brazil is included in the Appendix, Table 1.)

(It is important to try and time tourist seasons with the most favorable climate in each location, mindful of humidity and rainfall peaks.)

4. Beautiful Scenery

Some scenes in Brazil are of matchless beauty - Rio with its panoramic tapestry of blue sea, islands etched in white sand, waving palms and green covered mountains; the Amazon region,

mysteriously compelling with a myriad of jungle colors, forms and sounds; other coastal cities with magnificent, sweeping beaches set in tropical splendor. Complementing these natural surroundings can be found handsome architectural styles ranging from colonial period to advanced contemporary. It is not uncommon to find lush forests skirting the borders of thriving cities.

5. Cost-savings

Even though the cruzeiro-dollar exchange might not continue at its present level, Brazil's tourist living expenses are generally less than those in Europe, the Mediterranean, Hawaii and most places in the Caribbean. The initial cost of first class transportation between New York and Brazil is about the same as a round trip to Europe (\$828 to Rio versus \$819 to Paris). Europe has some advantage now in initial cost with the recent development of the Economy Fare - \$490 round trip to Paris. However, the generally lower cost of lodging, food, sightseeing and entertainment while staying in Brazil for two or three weeks can make up for this differential.

6. Folklore and Festive Seasons

Carnaval still remains the No. 1 attraction, but it requires further exploitation; the promotional effort seems to have been focused on Rio, whereas other cities offer interesting Carnavals, different in some aspects from Rio's. There are such events as the Festa da Uva in Caxias, the Holy Week pageant in Ouro Preto, Gaucho rodeos in Rio Grande do Sul, international sporting events in Rio, and other

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activities that could be developed into attractions of international prominence.

The music and dance of Brazil was formed from the fundamental elements which gave rise to the nation and offers a wealth of entertainment for tourists. The samba, born in the hill-side poor section of Rio, is today an international dance. The fetichistic songs of the macumbas, xangos and candombles (negro rites) are often endowed with profound beauty and grave suggestion.

7. World's "Newest Capital"

When Brasilia is completed and open to the public it will probably be a place that tourists want to see because of its bold concepts in design, ultra-modern functionalism, and position as a new capital.

8. Hunting and Fishing

Vast regions of Brazil still covered by jungle and virgin forests offer unexcelled opportunities for hunting big game - leopard, elk, crocodile, buffalo and others. River and offshore waters teem with fish of all types and sizes - it has been stated by an ichthyologist that there are 3,850 types of fish in the Amazon region.

9. Gem Stone Souvenirs

Brazil's rich deposits of precious and semi-precious stones of extraordinary purity, and the fine quality of Brazilian lapidary art produce great "bargains" in gem stone purchases for tourists.

10. Preparations for International Commercial Jet Flights

By 1960 there should be regularly scheduled jet planes flying from New York to Rio in 9 hours, each one capable of carrying 130 passengers. Air travel time to Brazil will be reduced by more than 50 per cent. In step with this advance in transportation, there will be two new, modern ships in service in 1958, capable of reaching Rio in eight days from New York, each with 500 passenger capacity.

B. THE TWELVE "SENSSES" OF THE AMERICAN TOURIST

While it is true that different things appeal to different people, experience and research has shown that there are certain characteristics in common to popular tourist places which have a "universal" appeal to the "senses" of the American tourists. It is useful to explain these "senses" and to adapt them as a basis for appraising the various tourist places which have been examined during the course of this survey. The twelve "senses" of the American tourist could be:

SANITATION	SHOWMANSHIP
SAVINGS	SIGHTSEEING
SCENERY	SMOOTH-WAYS
SEASONS	SOUVENIRS
SECURITY	"SPECIAL-APPEAL"
SERVICE	SPORTS

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1. Sanitation

Hygienic conditions are essential to the comfort and peace of mind of the average tourist. For example, clean restrooms, soap always available, clean glasses, dishes, lack of flies, insects, etc. are important. Although many travelers are tolerant of slight deviations in this respect - the opposite of first class sanitation systems can seriously hamper tourism potential. A bad reputation in this area can "worry" the tourist away from making a visit or even a stopover.

2. Savings

Low cost without sacrifice of high quality remains as a determining factor in the tourists choice of a place to visit. A hotel, for example, which meets international standards but charges one half the price can mean an actual saving, and create very favorable tourist reaction. The same applies to food, souvenirs, transportation, entertainment, etc.

3. Scenery

Nature provides the stage, in this case, and man can only arrange the "chairs" for comfortable viewing. Accessibility, transportation and accommodations are leading factors in "presenting" scenery to the tourist. The most beautiful panorama is somewhat blurred if observed by an exhausted, dissatisfied visitor. Also, capturing



scenery on film is a popular tourist pastime and should be catered to. Carefully located and marked observation areas as well as photo supply stands can contribute to the appreciation of scenery.

4. Seasons

The condition of climate usually serves as a holiday inducement when it offers the extremes of sun or snow. In the middle range lies the appeal of temperate, "good weather." Seasonal characteristics afford a variety of tourist recreations: swimming, golf, tennis, boating, hiking, photography, skiing, sleighing, etc. The tourist usually seeks "seasonal specialties" which are opposite to or an improvement on the climate currently prevailing in his native region.

5. Security

A sense of personal safety is important to the traveler and his family. Any compromise with security against harm and fraud has far-reaching, negative effects. The very "foreignness" of a place often times sets the tourist "on guard" - to mitigate this, steps should be taken to make the tourist feel secure during his visit; adequate and sympathetic police protection, honest treatment from merchants, reliable taxi service, up-to-date air and rail service, stable political climate, etc. Sometimes security is measured as a feeling of "well-being" rather than a tangible experience.

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6. Service

Gracious, skillful attention to the tourists' personal needs creates a lasting glow of satisfaction. The most elaborate hotel can be condemned with a few words - "the service was bad." A combination of fine cuisine and excellent service makes a memorable impression, and can establish a restaurant in the tourist's mind as a place to revisit. Service, to the international traveler, is both the art and science of creating an atmosphere of welcome.

7. Showmanship

The deft combination of elements of motion, sound, color, etc., to produce a dramatic effect distinguishes showmanship from random entertainment. Experience and flair in organizing and displaying talents for special audiences is important. Showmanship is a selling tool of tourism in that it can make routine attractions memorable and good attractions thrilling. Communicating information about a "show" aids in drawing the tourists.

8. Sightseeing

Probably the most popular tourist activity is "seeing the sights" of a foreign place. It is in this sphere that the highest degree of organization is required. All elements of the machinery of tourism should coordinate and center on making sightseeing an interesting, comfortable experience. From the very first hometown

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contact with the travel agent or carrier, the tourist is carried forward in a pre-planned manner by a team of qualified persons whose business it is to "handle tourists" - hotel; ground tour operator; management of museums, public gardens, art galleries, historical exhibits, other cultural manifestations; municipal tourism authorities; reception centers; souvenir dealers, etc. It is especially important that the "first visit" sightseer be hand-processed lest the "foreignness" of a place proves more bewildering than bewitching.

9. Smooth-Ways

The high level of safety, comfort, service and convenient schedules afforded by international transportation companies as well as U.S. domestic carriers has tended to develop high expectations in the traveling habits of the American tourist. Enroute to a foreign country from his hometown the ways are smoothed for him with care and precision. If the ground, air or water transportation within the foreign country is markedly lower in quality, the places visited will be less enjoyable for the traveler. Smoothways, on city sightseeing trips or long-range flights, can deliver relaxed, contented tourists in the right frame of mind to have fun and spend dollars.

10. Souvenirs

Gifts or mementos carried home can provide long-term recollections of a place visited. To the average tourist, souvenirs usually mean one or more of these:

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- (1) Products indigenous to and symbolic of a particular country or region;
- (2) An item handcrafted and aesthetically appealing;
- (3) A "bargain" in terms of value and cost.

Merchandising, packaging and display lend their influence to the salability of gifts bought abroad, although the tourist usually recognizes a balance between these factors and the quality and cost of the merchandise. A proud souvenir, which has been well made, interestingly presented and honestly sold can continue to extol the virtues of a place long after the holiday is over, thereby creating favorable conditions for more tourist visits.

11. "Special-Appeal"

Traditions blended with a contemporary way of life produce the flavor of a nation, its people and places. Seasoned with the innovations of man, plus natural beauty, the whole can harmonize to create a vibrancy which excites the imagination of a visitor. Certain of these aspects of life have extraordinary appeal, and they can be woven into the tourism picture. International travelers are stimulated by local customs or sights when they are expressed in such a way as to reflect the vital "personality" of a country.

12. Sports

"Greatest fishing in the world!" may be an anglers exaggeration, but it is the kind of word-of-mouth advertising that helps build the holiday image of a place. Most tourists are susceptible to some kind of outdoor recreational activity during a vacation in sunny lands. The more popular warm-weather pastimes are: swimming, golf, horseback riding, tennis, hiking, sailboating, skin diving, and other type spectator sports. It must be understood, however, that a trout stream without readily available fishing tackle has no more attraction than a beautiful bay empty of sailboats for hire, or tennis courts which exclude tourists. When sports facilities are properly organized they can add another exhilarating experience to the tourist's impressions, and enable the host interests to capitalize on existing resources without large expense.

The foregoing factors are linked to still another quality or "sense" which can make a place stand forth as a tourist attraction- namely, that reputation for being "different" or "unique." The greater the "differences," providing they are congenial in character, the greater are the advantages for the host country to draw tourists. These special features are usually distinctive treatments or resources in one or more of the areas generally covered by the twelve "senses" i.e.: climate, food, service, recreation facilities, historical landmarks, souvenirs, etc.



Oftentimes the "unique" things about a place are those very things for which "a place is known": France - cuisine; Switzerland - skiing; Italy - historical sites; Belgium - lace; England - tradition; United States - tall buildings, etc. It is a charge of the responsible tourism authorities to capitalize on those favorable characteristics which tend to make their region or country different from others. In doing so, through organization and communication, the "image" of a place is created, and desirable identification is submitted for the potential travelers consideration.

C. APPRAISALS OF PLACES SURVEYED

The favorable features of Brazil's tourism advantages have been generally reviewed. To determine how well Brazil has exploited these natural advantages it is useful now to submit specific appraisals of each of the places visited, employing the criteria outlined under the Twelve "Senses" of the American Tourist.

The appraisal system used is not a statistical one, describing fine gradations of accuracy, but rather a measuring device designed specially for this survey to aid in visualization.

A qualitative rating was established for each of the criteria in relation to the strengths and weaknesses of each place visited; U = unsatisfactory, P = poor, F = fair, G = good, E = excellent.

The bars marked with white cross-hatching show a higher rating based on contingency or potential. Their use is borne out in the "comments."

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To insure maximum objectivity, it was deemed essential to obtain unanimity of opinion on the system of rating, as well as the overall application. Appraisals of the following places were prepared by the survey team; accord on the results was later reached with the three Brazilian representatives of the Conselho de Turismo:

Rio de Janeiro (D.F.)

Petropolis (Rio de Janeiro)

Teresopolis (Rio de Janeiro)

Porto Alegre (Rio Grande do Sul)

Caxias do Sul (Rio Grande do Sul)

Samuara Resort (Caxias do Sul)

Torres (Rio Grande do Sul)

Iguaçu (Parana)

Cabo Frio (Rio de Janeiro)

Caxambu (Minas Gerais)

Campos de Jordao (Sao Paulo)

Belo Horizonte (Minas Gerais)

Ouro Preto (Minas Gerais)

Araxa (Minas Gerais)

Pocos de Caldas (Minas Gerais)

Sao Paulo (Sao Paulo)

Campinas (Sao Paulo)

Santos-Guaruja (Sao Paulo)

Manaus (Amazonas)

Belem (Para)

(Continued)

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Recife (Pernambuco)

Paulo Afonso (Alagoas)

Salvador (Bahia)

The appraisals follow - in order of places visited...(Charts 1 through 23)

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Chart 1

RIO DE JANEIRO (D. F.)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█					Many points of this beautiful city manifest <u>surprisingly</u> poor conditions of sanitation.
SAVINGS	█	█	█	█	█	Current dollar exchange advantageous.
SCENERY	█	█	█	█	█	In this respect the claims of the "travel folders" are truly fulfilled. Islands of Guanabara Bay deserve more attention.
SEASONS	█	█	█	█	█	Generally good with cooling trade winds. Relatively high humidity. Rainy season Nov. - May. About 90°F max. in Feb.; 60°F min. in July.
SECURITY	█	█	█			Language barriers, serious local transportation problems, remoteness of police, etc., detract from relaxed enjoyment.
SERVICE	█	█				All things being relative, "service" standards in this capital city are disappointingly under par.
SHOWMANSHIP	█	█	█	█		Again, this is a relative evaluation. For a city of such dimensions, minimum dynamism and imagination reduce this factor markedly.
SIGHTSEEING	█	█	█	█		Countless sights to see. Many adversely affected by negative aspects of other "senses". More English speaking guides urgently needed.
SMOOTH-WAYS	█	█	█	█		Excellent connections into the city. All aspects of in-city movement sub-standard.
SOUVENIRS	█	█	█	█		Gem stones popular. Cigars and other good Brazilian products not exploited. One promotional establishment, others lack spark.
"SPECIAL-APPEAL"	█	█	█	█	█	The very reputation of Rio, fabled in song and script, is exciting. Exploitation of this factor seems static.
SPORTS	█	█	█	█	█	<u>Could</u> be full range of top notch recreation facilities. Most sports require special arrangements or are unavailable.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 2
PETRÓPOLIS (Rio de Janeiro)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Standard hygienic conditions; clean streets; nice gardens and tree-shaded streets give "well-kept" impression.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Scenic drive from Rio, good mountain views -- forest offers varied and interesting landscape.
SEASONS						Cool, dry climate; pleasant relief during hot season.
SECURITY						Well-policed streets as would be expected in a city where the Government stays the summer.
SERVICE						Hotel accommodations good at the Hotel Quitandinha; service slow; food fair.
SHOWMANSHIP						Nice gardens, flowers, streets lined with trees, bridges, make this resort very picturesque.
SIGHTSEEING						Scenery, Quitandinha, Imperial Museum, lavish houses, orchid collection, horse-drawn carriages, provide ample opportunities.
SMOOTH-WAYS						Well-paved road from Rio, and scenic drive through forest.
SOUVENIRS						Somewhat limited in variety.
"SPECIAL- APPEAL"						Nature's setting complemented by pretty homes and scenic drives is charming.
SPORTS						Facilities for golf, swimming, rowing, tennis, volley-ball, horse-riding, are organized for tourists.

U = unsatisfactory P = poor F = fair G = good E = excellent

Chart 3

TERESÓPOLIS (Rio de Janeiro)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Sub-standard, hygienic conditions; no soap in hotel, swarms of flies at mealtime; unclean streets.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Scenic drive from Rio, good mountain views. National Park offers varied and interesting landscape.
SEASONS						Cool, dry climate; pleasant relief during hot season.
SECURITY						Unlit streets at night and lack of policemen create apprehension.
SERVICE						Hotel accommodations meager, service slow; good at one resort where accommodations are limited.
SHOWMANSHIP						Little effort made to capitalize on Nature's works.
SIGHTSEEING						Scenery, National Park and lavish homes, provide some opportunities.
SMOOTH-WAYS						Well-paved roads from Rio. New highway to Teresópolis will reduce travel time.
SOUVENIRS						Very limited in variety.
"SPECIAL- APPEAL"						Natural setting, complemented by pretty homes and scenic drives is charming.
SPORTS						Facilities for golf, swimming, tennis, good. Not organized for tourists.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 4

PORTO ALEGRE (Rio Grande do Sul)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Overall impression of up-to-date living conditions and attention to standard sanitation requirements.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Landscape offers pleasant vistas of rolling terrain, mountains and river. Nice observation from high places in city.
SEASONS						Average temperature in January and February 86°F; March, April and May are more moderate and are considered best months.
SECURITY						Friendly, tolerant appearing people in atmosphere of serious industry provokes secure, relaxed feeling. Adequate public safeguards.
SERVICE						European background of region contributes to better service standards. Promising new hotel under construction. Few good restaurants.
SHOWMANSHIP						Dramatic interpretation and presentation of urban and regional attractions lacking.
SIGHTSEEING						Conscientious but moderately effective "visitor plant". Limited variety of tourist sights-to-see.
SMOOTH-WAYS						Local transportation media overloaded. Surrounding road connections bear improvement. Air and other route passages satisfactory.
SOUVENIRS						Tourist shopping facilities not yet developed. Adaptation of existing retail outlets to tourist needs not observable.
"SPECIAL- APPEAL"						Demographically and physically agreeable, but inadequate utilization of traditional, unique cultures and customs.
SPORTS						Large stadium, swimming nearby, and an attractive golf club offer certain outdoor recreations.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 5

CAXIAS DO SUL (Rio Grande do Sul)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	■					Overall impression of below standard sanitary conditions. Observable living standards add to this impression.
SAVINGS	■	■	■	■	■	Although current dollar exchange is advantageous does not seem to be opportunity here to make capital of it.
SCENERY	■	■				Limited natural endowments.
SEASONS	■	■	■	■		See Porto Alegre.
SECURITY	■	■	■			Absence of tourist conditions causes uncomfortable feeling for visitors, relieved by simple, agricultural personality of citizens.
SERVICE	■					Inasmuch as there can be little demand yet for "service" this factor has minimal significance.
SHOWMANSHIP	■	■				Wine Festival celebration and Industrial Exhibition are susceptible to upgrading for tourist tastes.
SIGHTSEEING	■					Beyond the two mentioned above there is nothing known to be seen. There is no "visitor plant".
SMOOTH-WAYS	■	■				Limited air connections and poor roads.
SOUVENIRS	■	■	■			Items of some interest are purchasable at Feira Industrial. Language barriers present a problem.
"SPECIAL- APPEAL"	■					Aside from the Festa da Uva there is little excitement. Italian background is not displayed in lively manner.
SPORTS	■	■	■	■	■	Visitors will doubtless apply this factor against facilities at nearby Samuara Resort. There, sports <u>should</u> be well organized.

U= unsatisfactory

P = poor

F = fair

G = good

E = excellent

Chart 6

SAMUARA RESORT (Caxias do Sul)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						If the promises of Samuara are fulfilled when it is completed (scheduled July 1958), this factor should rate high.
SAVINGS						Same as the foregoing -- with reference to "Savings".
SCENERY						A fine mountain top view, natural lake, etc.
SEASONS						The climate is temperate and agreeable.
SECURITY						Same as "Sanitation" -- with reference to "Security".
SERVICE						Same as above -- with reference to "Service".
SHOWMANSHIP						Same -- with reference to "Showmanship".
SIGHTSEEING						Same -- with reference to "Sightseeing".
SMOOTH-WAYS						Surrounding roads generally bad. Local transportation inadequate. Air connections fair.
SOUVENIRS						Same -- with reference to "Souvenirs".
"SPECIAL- APPEAL"						Same -- with reference to "Special-Appeal".
SPORTS						This factor should be outstanding if all expectations are fulfilled, i.e. boating, swimming pools, etc.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 7

TORRES (Rio Grande do Sul)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Modest sanitation facilities during more than 3 hour drive to Torres - below international traveler standards.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Expanse of ocean, beach and mountains behind presents a striking scenic panoply. Comfortable accessibility lacking.
SEASONS						Climate, temperate and agreeable.
SECURITY						Pleasant, peaceful character of village partly compensates for absence of "visitor-plant" and uncertain transportation means.
SERVICE						Structured primarily for simple, local tastes. One hotel, closed from March through November.
SHOWMANSHIP						None apparent.
SIGHTSEEING						No "visitor plant". Transportation within and to Torres is inadequate.
SMOOTH-WAYS						Relatively long, arduous drive along the not-so-smooth beach; also, unpaved road.
SOUVENIRS						None apparent.
"SPECIAL- APPEAL"						Natural beauty unworked by the innovation or ingenuity of man.
SPORTS						Organization and equipment lacking.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

Chart 8
IGUAÇU (Paraná)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Existing facilities rate low. When new hotel opens there should be a decided improvement.
SAVINGS						Usual economy advantages, but there is little opportunity to use them presently.
SCENERY						Falls are very impressive. Certain close-up views breathtaking. Reach full range July-September.
SEASONS						Extremes of heat and cold occur here.
SECURITY						Present low standards of security should be elevated when new hotel opens.
SERVICE						Similarly, bad service standards should be well improved when new hotel opens.
SHOWMANSHIP						Techniques for "showing" the falls are humble. Crude walks, platforms etc. need streamlining.
SIGHTSEEING						No "visitor plant". Roads very bad. No guides.
SMOOTH-WAYS						Transportation to and within Iguazu is inconvenient and uncomfortable.
SOUVENIRS						None apparent.
"SPECIAL- APPEAL"						With facilities of new hotel this mighty spectacle should be even more enjoyable.
SPORTS						None seem to exist presently. Fishing, swimming, boating etc. should be organized when new hotel opens.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

Chart 9
CABO FRIO (Rio de Janeiro)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	■	■	■			Below international traveler standards. Many flies. Unclean conditions.
SAVINGS	■	■	■	■	■	Current dollar exchange advantageous.
SCENERY	■	■	■			Island dotted shore. A section of white sand dunes. Accessibility crude.
SEASONS	■	■	■	■		Refreshing breezes in Summer months turning to cold in Fall and Winter.
SECURITY	■	■	■			No particular attentions or welcome for foreigners. No road signs. Generates a "cut-off" feeling.
SERVICE	■					Well below expectations of the international traveler.
SHOWMANSHIP	■					None apparent.
SIGHTSEEING	■					No efforts in this direction are evident.
SMOOTH-WAYS	■	■	■			Pleasant ferry-boat ride to Niterói. About 25% of route consists of bad, dirt roads.
SOUVENIRS	■					None apparent.
"SPECIAL- APPEAL"	■	■	■			The allure of sea, sand and sky is left unsupported by man's imagination in devising "local color".
SPORTS	■					Only swimming now. No organized fishing, boating or skin diving facilities.

U = unsatisfactory P = poor F = fair G = good E = excellent

Chart 10

CAXAMBU (Minas Gerais)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Even the streets are washed and swept at night ...
SAVINGS						Current dollar exchange advantageous.
SCENERY						A pretty town with mountains and forests around.
SEASONS						Moderate and comfortable.
SECURITY						A visitor can relax and enjoy himself in a tourist oriented atmosphere.
SERVICE						Care for comfort and convenience of visitors demonstrated in top hotel.
SHOWMANSHIP						Imagination and creativity has been invested in design of Parque das Aguas.
SIGHTSEEING						No "visitor-plant". Mountain ascent interesting but saddle horses poor. English not spoken at Parque.
SMOOTH-WAYS						Only about 45 minutes of the drive from Rio on dirt road. Charrete transportation within town entertaining.
SOUVENIRS						Sidewalk vendors offer limited wares.
"SPECIAL-APPEAL"						Quiet charm, reflecting the warm, friendly disposition of the citizens.
SPORTS						Swimming pool, tennis courts and rowing lake are available. Golf course desirable.

U = unsatisfactory P = poor F = fair G = good E = excellent

Chart 11
CAMPOS DE JORDÃO (São Paulo)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Hygienic conditions are noticeably a prime consideration. Nearby sanitaria might cause slight concern.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Splendid mountain-valley views from 1600 meters above sea level. Hard-packed dirt roads.
SEASONS						Generally cool. Summer: days, 77°F; nights, 60°F; Winter: days, 66°F; nights, 52°F.
SECURITY						Tourists are the business of this section. Thus an air of professional hospitality is evoked.
SERVICE						Indifferent. Perhaps it improves during season, December -- March.
SHOWMANSHIP						Hotels with Swiss chalet type architecture are picturesque. Beyond that, not much drama or excitement.
SIGHTSEEING						Electric train ascent of mountain (2 hours) offers fine views. No "visitor plant". Little English spoken.
SMOOTH-WAYS						About 45 minutes of dirt road on 3½ hour drive from Caxambu. No airport.
SOUVENIRS						One shop with tidy appearance and interesting local products. No English spoken.
"SPECIAL- APPEAL"						"Local color" is pale. Nature awaits man's ingenuity to produce vital tourist conditions.
SPORTS						One hotel has indoor swimming pool; others have tennis courts. Saddle horses are poor. Need golf, fishing etc.

U = unsatisfactory P = poor F = fair G = good E = excellent

Chart 12

BELO HORIZONTE (Minas Gerais)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						Generally high standards in this respect.
SAVINGS						Current dollar exchange advantageous.
SCENERY						A nicely planned city without notable scenic attributes.
SEASONS						Invigorating climate.
SECURITY						One has a feeling of "well being" in this bustling city.
SERVICE						Hotel procedures generally show attention to comfort and pleasure of guests. Some good restaurants.
SHOWMANSHIP						None apparent. No night-life.
SIGHTSEEING						No organized tours. Recently founded "school for guides" is a promising step.
SMOOTH-WAYS						Air terminal unprepossessing. Roads leading out of city are poor. Internal networks are good.
SOUVENIRS						None apparent.
SPECIAL- APPEAL"						Commercial overtones of Belo Horizonte do not afford lively tourist appeals.
SPOrts						A single club offers tourists Brazil's largest swimming pool, and tennis courts. Good climate for golf.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 13

OURO PRETO (Minas Gerais)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█			Aside from one up-to-date hotel, facilities in this old town are crude.
SAVINGS	█	█	█	█	█	Current dollar exchange advantageous.
SCENERY	█	█	█	█		Steep hills crowned with churches, vistas of terraced gardens, ruins etc.
SEASONS	█	█	█	█		Invigorating climate.
SECURITY	█	█	█			Special character of the town helps to offset a feeling of being "cut off" from the usual "shelters".
SERVICE	█	█				Facilities of the single, small hotel can only satisfy basic requirements.
SHOWMANSHIP	█	█	█			Museu da Inconfidência is alive with 18th century atmosphere. Holy Week procession a moving display of dramatized faith.
SIGHTSEEING	█	█	█			No "visitor plant". Fine camera "targets", but rugged routes, inadequate transport, no English etc.
SMOOTH-WAYS	█					Suitable only for the hardest travelers. Paved road from Belo Horizonte to be completed in January 1959.
SOUVENIRS	█	█	█	█		Distinctive items of soapstones -- also antiques and religious articles. No English.
SPECIAL-APPEAL	█	█	█	█		The romance of the past preserved in a treasure house of colonial and baroque architecture.
SPORTS	█					(The absence of sports features does not have significance for Ouro Preto).

U = unsatisfactory P = poor F = fair G = good E = excellent

Chart 14
ARAXÁ (Minas Gerais)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█	█		Generally satisfactory, but attention to detail lacking: cobweb on hotel lampshade, bad bathroom drainage...
SAVINGS	█	█	█	█		Current dollar exchange advantageous.
SCENERY	█	█	█			Immediate hotel vicinity presents modest scenic display. Bridle paths uninteresting.
SEASONS	█	█	█	█		Invigorating climate.
SECURITY	█	█	█	█		The hotel complex is a complete "shelter" with the properties of a "city" in itself.
SERVICE	█					Ranges from indifferent to invisible. Dismal lighting throughout.
SHOWMANSHIP	█	█	█			Movie theater in hotel offers pleasant diversion. Boite commonly decorated. Baths closed at 10:00 a.m. Pool closed 3 hours noon.
SIGHTSEEING	█					If there are sights to see outside the hotel they are not organized.
SMOOTH-WAYS	█	█	█	█		Convenient air schedules. Adequate roads.
SOUVENIRS	█	█	█			One sidewalk vendor outside hotel with attractive cloth items. Shops in hotel commonplace.
"SPECIAL- APPEAL"	█	█	█			The 600 room "luxury" hotel needs many guests to lend it life, much less excitement.
SPORTS	█	█	█			Poor use made of existing facilities: tired horses, too few tennis courts, pool closed half day etc.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

Chart 15

POÇOS DE CALDAS (Minas Gerais)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						No slum sections on way from airport to hotel. Town has a well tended look with attention to cleanliness.
SAVINGS						Current dollar exchange advantageous.
SCENERY						Picturesque forests. Scenic attractions of secondary importance to thermal establishments.
SEASONS						Excellent climate. Average daily temperature 70°F -- cooler at night. Highest altitude of all Brazilian spas.
SECURITY						A resort town with some experience in handling foreign visitors. Hence the tourist does not feel alien.
SERVICE						A European atmosphere pervades the top hotels, influencing service standards favorably.
SHOWMANSHIP						A variety of coin games in one hotel provides divertimento. Two decent movie houses in town.
SIGHTSEEING						No "visitor plant". Very little English spoken throughout.
SMOOTH-WAYS						Convenient air connections. Air field needs extension (now only 2700 feet). Fair dirt roads lead into town.
SOUVENIRS						One or two well equipped souvenir shops. No English spoken.
SPECIAL APPEAL"						Landscaping, architecture, entertainment etc. are agreeable, but without flair.
SPORTS						Country Club has rundown appearance. Mecano-terapia (world's largest) offers unusual opportunities for exercise.

U = unsatisfactory P = poor F = fair G = good E = excellent

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Chart 16
SÃO PAULO (São Paulo)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION						High levels of sanitation usually found in an up-to-date, progressive city.
SAVINGS						Costs for lodging, food, entertainment etc. are relatively higher than in other Brazilian cities.
SCENERY						A thriving, commercial metropolis whose natural, scenic attractions lie outside the city.
SEASONS						Temperate with foggy nights and ample rainfall.
SECURITY						Civilized, "big city", international atmosphere generates feeling of easy security.
SERVICE						European backgrounds plus intelligent attention to profit values set higher service standards.
SHOWMANSHIP						Some interesting places to see that need to be endowed with life. Relatively cosmopolitan nightclubs.
SIGHTSEEING						Good operational base, but improved organization and development needed. Need more English speaking guides.
SMOOTH-WAYS						Good route connections. Internal tourist handling techniques need sharpening. One outfit to add 250 sightseeing buses soon.
SOUVENIRS						Souvenirs available, but this factor not well integrated into the total tourist picture.
SPECIAL- APPEAL"						A pervasive kinetic energy stimulates the visitor's senses. Not enough "typically" Brazilian flavour.
SPORTS						If available, not organized for tourists. Excellent sport clubs not open to tourists.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

Chart 17

CAMPINAS (São Paulo)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█			Limited restroom facilities on the way and during visit to coffee farm.
SAVINGS	█	█	█	█	█	Current dollar exchange advantageous.
SCENERY	█	█	█			Interest in plantations is functional rather than scenic. Motor-road presents fair views.
SEASONS	█	█	█			Temperate, ample rainfall.
SECURITY	█	█	█	█		As Campinas is usually seen in a one-day conducted tour, this factor is satisfactorily disposed of.
SERVICE	█	█	█			Some "service" could well be woven into the lengthy plantation visit: serve coffee, refreshments etc.
SHOWMANSHIP	█					Coffee farm, composer museum, silk plant, hotel etc. do not trade effectively on this factor.
SIGHTSEEING	█	█	█			Organized tours and good routes available. The sights need polishing to reflect higher interest.
SMOOTH-WAYS	█	█	█	█	█	The "ways" are relatively smooth. Taxis not best for highway travel.
SOUVENIRS	█					None apparent.
SPECIAL-APPEAL"	█					No capital made of plantation life, legend, harvest traditions etc.
SUPPORTS	█					Not a significant factor, inasmuch as such a short time is spent in Campinas.

U = unsatisfactory P = poor F = fair G = good E = excellent

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Chart 18
SANTOS - GUARUJÁ (São Paulo)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█			Overall impression of elegant holiday resort dimmed by oily surf, unclean sand in Santos, signs of neglect in hotels.
SAVINGS	█	█	█	█		Current dollar exchange advantageous.
SCENERY	█	█	█	█		Beautiful sweeps of beaches and offshore islands set in tropical splendor
SEASONS	█	█	█			Temperate. Heavy rainfall in June, August and September.
SECURITY	█	█	█			The quiet, tropical beauty creates a feeling of warmth and familiarity.
SERVICE	█	█	█	█		An impression that service is neglected rather than absent. A Guarujá restaurant rates high in this respect (building hotel)
SHOWMANSHIP	█	█	█	█		Latent possibilities, attended with indifference by host interests. A Guarujá-Club restaurant does a very good job.
SIGHTSEEING	█	█	█			Narrow tourism mentality restricts "visitor plant". Little English spoken.
SMOOTH-WAYS	█	█	█	█		Bridge to Guarujá would relieve ferryboat congestion. Time consuming taxi and launch ride to airport. Good route connections.
SOUVENIRS	█					None apparent.
"SPECIAL-APPEAL"	█	█	█	█		Many natural advantages not capitalized on. Guarujá has developed this factor well.
SPORTS	█	█	█	█		Not well developed in Santos. A Guarujá-Club restaurant offers full range of recreation activities at Jequití-Mar.

U = unsatisfactory P = poor F = fair G = good E = excellent

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Chart 19
MANAUS (Amazonas)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	■	■	■			Aside from hotel the appearance of city gives impression of low sanitation standards.
SAVINGS	■	■	■			Hotel costs are relatively high. Food and equipment imported by air from São Paulo.
SCENERY	■	■	■	■		Lush jungle foliage and great rivers provide exotic views.
SEASONS	■	■	■			Average temperature 80° F. High humidity and heavy rainfall. Weather best during May, June and July.
SECURITY	■	■	■			It is expected that this low-rated factor is not important to the adventurous tourist.
SERVICE	■	■	■			Similarly, it is not expected that poor "Service" will deter the Amazon visitor.
SHOWMANSHIP	■	■	■	■		Launch tour, macumba, living on houseboat etc. Useful giveaways presented to hotel guests.
SIGHTSEEING	■	■	■	■		English speaking guide supplied by hotel. Main roads good. Interesting four day tour program.
SMOOTH-WAYS	■	■	■	■		Convenient air service. Mainly paved roads around the city. Hotel supplies 2 Volkswagen buses.
SOUVENIRS	■					A poor display in the hotel. Indian handiworks could be developed.
"SPECIAL- APPEAL"	■	■	■	■		The magic lure of "a trip up the Amazon" is strong.
SPORTS	■	■	■	■		A paradise for fishermen, with special attractions like alligator hunting. Needs organization.

U = unsatisfactory P = poor F = fair G = good E = excellent

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Chart 20
 BELÉM (Pará)

TOURIST "SENSSES"	RATING					COMMENTS
	U	P	F	G	E	
NITATION						Insect protection afforded by screened windows in hotel. Dock littered with fish remains and busy "urubus".
VINGS						Current dollar exchange advantageous.
ENERY						Nice tree shaded boulevards. Rubber-boom buildings in state of disrepair. Route from airport through run-down section.
ASONS						Warm climate -- between 80° and 84°F. Frequent showers. High humidity.
CURITY						Town has a stillness which produces easy feeling of "well-being" despite lack of tourist "cares".
RVICE						Basic in nature although top hotel has European appearance. No English spoken.
OWMANSHIP						Some beautiful churches, the Bosque and Museu Paraense etc. are good to see. No night-life. Folklore festivals undeveloped.
HTSEEING						No effective "visitor plant" yet. SENAC attempting to conduct tourist guide instruction courses. Several guides available.
OOOTH-WAYS						Air service good. Fine internal connections.
UVENIRS						Several small, pleasant looking shops. Alligator-skin items -- some poorly made.
PECIAL- APPEAL"						Faded elegance reminiscent of past glories is without stimulation here.
ORTS						None apparent. River sailing and big game hunting could be developed.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 21

RECIFE (Pernambuco)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█	█		Generally good impression. Some narrow unclean streets.
SAVINGS	█	█	█	█		Current dollar exchange advantageous.
SCENERY	█	█	█	█		Boa Viagem quarter presents imposing shore-line view; monotony of flat-looking city broken by river running through center.
SEASONS	█	█	█	█		Temperature in the 80's, comfortable breezes. Little rainfall.
SECURITY	█	█	█	█		New beach hotel and quiet Venice-like appearance of city combine to produce comfortable feeling of "well-being".
SERVICE	█	█				In one hotel, bad. In a single restaurant, good. Generally sub-standard.
SHOWMANSHIP	█					Hotel arranges jangada "voyages" in offhand manner. No other evident attempts to capitalize on local "color".
SIGHTSEEING	█					No "visitor plant". Churches of relative interest, a modest museum, dirt road zoo-botanico etc.
SMOOTH-WAYS	█	█	█	█		Air service good. New 10,000 foot runway underway to handle jet aircraft. Comfortable internal connections.
SOUVENIRS	█	█	█	█		Interesting ceramic art (Vitalino). Only 2 suitable shops. In one, prices marked. No English spoken.
"SPECIAL- APPEAL"	█	█				Folklore dances were not demonstrated. Characteristic jangada rafts are exciting for the adventurous.
SPORTS	█					One golf club with tired, rustic appearance, surf swimming. Fishing and boating need development.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 22

PAULO AFONSO (Alagoas)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█	█	█	Existing hotel and restaurant facilities rate low. When new hotel is completed, there should be decided improvement.
SAVINGS	█	█	█	█	█	Usual economic advantages -- little opportunity to use them presently.
SCENERY	█	█	█	█	█	Falls not as impressive as Iguacu -- somewhat barren surroundings.
SEASONS	█	█	█	█	█	Hot, dry climate.
SECURITY	█	█	█	█	█	Present low standards of security should be elevated when new hotel opens.
SERVICE	█	█	█	█	█	Sub-standard service should be upgraded when new hotel opens.
SHOWMANSHIP	█	█	█	█	█	Techniques for showing falls poor; hydroelectric plant well organized.
SIGHTSEEING	█	█	█	█	█	Crude facilities for viewing falls; no guides; hydroelectric plant has reception center.
SMOOTH-WAYS	█	█	█	█	█	Transportation to and within Paulo Afonso is inconvenient and uncomfortable.
SOUVENIRS	█	█	█	█	█	None apparent.
"SPECIAL- APPEAL"	█	█	█	█	█	Falls have limited appeal -- hydroelectric plant only to special groups.
SPORTS	█	█	█	█	█	None apparent.

U = unsatisfactory

P = poor

F = fair

G = good

E = excellent

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Chart 23
SALVADOR (Bahia)

TOURIST "SENSES"	RATING					COMMENTS
	U	P	F	G	E	
SANITATION	█	█	█			Adequate in hotels and public places. Streets need cleaning.
SAVINGS	█	█	█			Current exchange rate advantageous.
SCENERY	█	█	█	█		Panoramic sweep of ocean, beach and palm trees beautiful. Upper and lower cities provide contrast.
SEASONS	█	█	█			Offshore breeze keeps temperature moderate.
SECURITY	█	█	█			City gives impression of being quiet, peaceful -- inhabitants friendly.
SERVICE	█	█	█			Hotel capacity limited, but service inadequate. Too few public restaurants -- typical dishes unavailable.
SHOWMANSHIP	█	█				Candomblé and Capoeira not tourist-oriented. Yacht Club good, but closed to tourists. Limited night-life.
SIGHTSEEING	█	█	█	█		Great variety offered -- beaches, upper and lower city, churches, colonial antiquity still preserved.
SMOOTH-WAYS	█	█	█			Good air connections; smooth ride from airport and in-city; well-marked streets.
SOUVENIRS	█	█	█			Good variety offered in market and several shops. "Bargaining" adds to fun.
"SPECIAL-APPEAL"	█	█	█	█		Charm and vibrancy created by blending of cultures, folklore, picturesque settings.
SPORTS	█					Swimming possible. Other recreation must be arranged in private clubs.

U = unsatisfactory P = poor F = fair G = good E = excellent

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D. BRAZIL'S TOURISM PROBLEMS

Analyses of the specific appraisals and discussions with all elements of the travel business, have disclosed that there are many problems in common to tourism in Brazil. Outlined in this section are the major internal problem areas, both specific and overall, which have contributed to Brazil's relatively small participation in the U.S. travel market and which represent obstacles to the growth of tourism.

1. SPECIFIC

a. Hotels

There seems to be complete agreement among members of the tourist industry in Brazil that the need for more hotel rooms represents a No. 1 problem (Appendix, Table 2). According to hoteliers, the situation is particularly critical in some sectors. Occupancy rates in some Class A hotels run as high as 80 - 90% on an annual basis, and 85 - 100% during the peak tourist seasons (Appendix, Table 3). Sao Paulo and Santos reported the lowest annual occupancy rate - 65 and 40%, respectively.

There are certain seasons of the year when some cities are at crowded or peak hotel occupancy while hotel facilities in other cities are at their points of lowest occupancy. For example, in the month of November hotels in Porto Alegre are at highest occupancy while the hotels in Rio de Janeiro are at lowest occupancy.

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It is evident then that a redirection of the tourism flow during these seasons would enable Brazil to utilize the existing hotel space now available to maximum advantage (Appendix, Table 3).

The hotel industry reports that the present burdensome hotel tax structure and the lack of government incentives (tax exemptions) on new hotel construction are the major inhibiting factors to attracting investor capital.

Present plans for expanding hotel capacity in all of Brazil incorporate less than 1,500 rooms, as reported by leading hoteliers. Some of these plans await necessary financing and in no case does it seem that firm completion dates can be established (Appendix, Table 4).

The need for additional hotel space is certainly not restricted to Brazil. It is one of the major problems facing the entire tourist industry. In an "International Travel Report to the President of the United States," Mr. Clarence B. Randall, Special Assistant to the President, had this to say: "The acute shortage of hotel rooms in most countries of the world is subjecting tourists to great inconvenience and discouraging travel. As a result, travel agents are increasingly bypassing many cities formerly on regular itineraries. Confounding the problem is the anticipated increase in airline capacity with the advent of the jet age."

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the price factor is one thing that is presently advantageous to tourism in Brazil. Hotel rates are on a par with, or lower in many instances, than rates in leading cities of other countries (Appendix, Table 5).

Standards of service in most hotels visited during the course of the survey were below those to which the average U.S. tourist is accustomed. Some of the difficulties encountered were: inability to make oneself understood, poor telephone service, phlegmatic waiters, no soap in bathrooms, suits misplaced by the laundry; water shortages and generally poor attention to detail with regard to room service. Registration details which must be recorded by guests are irritatingly lengthy and probing.

Of all cities responding to the hotel questionnaire, only one in Brazil stated that their hotel people had made a study of the tastes of Americans. Only one city reported that their hotel people had established regular training courses for hotel staff. Two cities admitted to any kind of minimum quality standards.

Responses to questionnaires revealed that there are about 125 air-conditioned hotel rooms in all of Brazil. At certain times of the year air-conditioning would be considered an essential part of good service by most American tourists (Appendix, Table 6).

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b. Language

There are an insufficient number of English-speaking personnel ✓
for every point of contact where the American tourist seeks to express his needs and desires. This applies to customs inspectors, baggage porters, taxi drivers, hotel staff, policemen, shopkeepers, etc. The situation creates confusion and frustration. While the traveler is ready to expect some difficulties in this respect, continued repetition of the problem makes a very unfavorable impression.

This situation is pointed up in the analysis of hotel questionnaires from Sao Paulo. Generally speaking, Sao Paulo had the highest service standards of any city visited, in the opinion of the survey team. Nevertheless, of the 20 Sao Paulo Class A hotels responding to the questionnaire (Appendix, Table 7):

- 11 had no English-speaking telephone operators.
- 10 had no English-speaking headwaiters.
- 7 had no English-speaking maids.

In addition to the above it was also ascertained that 17 of the hotels did not have English on their menus and 13 of them admitted to no training of the staff in English.

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c. Transportation

It is now estimated that some 150,000 U.S. visitors will travel Europe by automobile this year, either by shipping their own vehicles, or by renting or purchasing cars on arrival. Because more of the country can usually be seen, and also because of acquired habits, Americans like to drive their own cars on vacation. Brazil cannot satisfy this need because of certain factors:

- Insufficient paved roads linking tourist attractions.
- Lack of cars for hire. Even in major cities it is extremely difficult, as well as prohibitive cost-wise, to arrange for a drive-yourself automobile.
- Relatively high cost of chauffeured automobiles. For most international travelers, the hire-cost and generally antiquated condition of the automobiles would be unsatisfactory.
- Personal automobile cannot be brought into the country without posting a 150 per cent "ad valorem" bond. Two-week entry delays are not uncommon.

There are within the National Highway Plan certain highways which may usefully serve the facilitation of international tourism as well as the national tourist traffic of Brazil.

(A status report concerning the Government's plan for

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developing these routes and a map indicating them as recorded under Public Law, Number 2975, November 24, 1956, is contained in the Appendix, Table 8.)

The limited and antiquated nature of train service in Brazil tends to discourage the tourist from using this means of transportation.

A special situation concerns the shortage of taxis in some of the principal cities. Searching for a taxi can be a most trying and frustrating experience. The same applies to the usually long wait for airport transfers.

While the ground facilities, flight schedules, and frequencies of internal air travel appear to be adequate, there exist certain inconveniences:

- Airport announcements for domestic flights are made in Portuguese only.
- Service and food on board are geared to local tastes.

d. Sanitation

The American traveler has been brought up, almost without exception, in an atmosphere where hygienic conditions are taken for granted. He is not accustomed to unclean washrooms with old, malfunctioning plumbing. He expects to find soap in public restrooms, and in his hotel bathroom. Ample water for ablutions is a normal expectation.

Certain foods and liquids in Brazil are reputedly unsafe to consume; such edibles as lettuce, uncooked or unpeeled fruits and vegetables, milk, etc. Further, tourists are warned to drink only bottled water. This "threat" to health detracts from the visitor's full enjoyment, and in fact sometimes causes him extreme discomfort.

A remarkably inconsistent condition is in the dirty, unrepaired streets in Rio, contrasted with the artistic and distinctive splendor of the mosaic sidewalks. These walks could be one of Rio's singular attractions, but their value is almost entirely effaced by the general state of uncleanness and disrepair. Many visitors who have traveled long distances to see beautiful Copacabana beach are disappointed when they see its present condition of apparent neglect.

e. Tours

Quoting from a returned travel agent questionnaire, "Unless the tourist is traveling on some sort of itinerary, he must pretty much dig up an agent himself in order to learn what is available. Tour brochures are poor generally and not well distributed." The observations of the survey team coincide with this conclusion.

Estimates as to the number of English-speaking guides in Rio (population about 3,000,000) range from 15 to 20. In Sao Paulo there are about 10; in Bahia 8 or 9. In most of the other cities the situation is worse.

Only in one city visited was there a major, organized effort to train prospective guides in English and the culture and traditions of the region. Most travel agents admitted freely that the guides in their employ did not base their tours on carefully devised, prepared talks.

f. Customs and Entry Regulations

There is no separation at the various points of entry between "true" tourists and those persons who may be arriving in Brazil for other reasons. (Great Britain customs has separate desks for tourists and for returning or entering nationals. France and Italy allow returning nationals to do most of the paper work involved with bringing in furniture, appliances, etc., at their consulates in the foreign country from whence they are returning.)

The tourist may have to wait a long time while returning residents are clearing appliances, TV sets and other articles of merchandise.

Sometimes he is not allowed to bring in cameras, films, souvenirs purchased in other places, hand valises and similar articles which are normally permitted entry by foreign countries.

Brazilian customs agents generally do not speak English.

There are no organized welcoming procedures, such as offering a cool refreshment, personal greeting, etc.

These conditions cause delays, confusion and negative impressions at the very outset of a holiday.

g. Sports

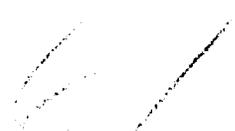
The average tourist must rely in the main on his own wits or personal acquaintances in order to avail himself of sports recreation facilities in Brazil. For golf or tennis, sailing or yachting he must generally make arrangements at private clubs, providing he is fortunate enough to gain access or have a friend "at court." Fishing, skin diving and other sports are even less organized for tourist participation.

Inasmuch as the focus of the survey is on tourism, the preceding problems have not been evaluated in relation to the total economic needs of the country.

Their relative importance is more properly a matter for Brazilian determination, in the light of overall economic development objectives. Many of these problems are broad in scope, involving diverse elements of the economy, and it is expected that their solutions will gradually evolve as the basic needs of the country are fulfilled.

2. OVERALL

The foregoing problem areas are symptoms of underlying troubles facing tourism in Brazil which are all-encompassing in scope and character:



a. Tourism Management

Tourism today is big business. Solving the problems, therefore, requires application of modern management techniques.

- . Organizing - while there are various groups in Brazil concerned with tourism on a state or municipal level (as well as private entities), there is no national body with official sanction that can speak with authority, initiate necessary legislation, prepare and execute a comprehensive tourist development program.
- . Planning - there is no overall blueprint for tourism - covering the programming of planned actions necessary to effectively exploit the natural and man-made resources which have potential for tourist attractions.
- . Integrating - the construction of hotels, restaurants, expansion of transportation services, etc., should go hand in hand with the advancement of public facilities like roads, bridges, airports, water and sewage systems, etc. In Brazil, there are many examples of half-developed tourist attractions, i.e., a modern hotel with an unpaved, dusty road leading to it; a magnificent waterfall letting worthy of several days visit with inadequate hotel accommodations; a beautiful beach marred by sewage disposal channels.



- Measuring - Brazil has no system for determining the number of visitors entering the country, where they come from, expenditures, time spent, etc. Nor does it know how many Brazilians visit abroad, where they go, etc.

b. Tourism Machinery

Tourism, just like any other business operation, requires a "plant" to produce goods and services. The building stones of a sound "visitor plant" for Brazil include:

- Capital - while the capital requirements of this business must be correlated with the total economic needs of the country, consideration should be given to some government spending and ways and means of attracting private investor capital. At the present time there is no evidence of any Federal budget being assigned to tourism; nor do there appear to be adequate incentives for stimulating the flow of private funds.
- Facilities - the "visitor plant" is made up of certain essentials: shelter, food, communication, transportation, protection, entertainment, recreation, etc. In Brazil these elements exist for the most part, but they have not been refined and

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brought together to effectively produce the goods and services required for tourism. They have not been "engineered" to provide for maximum utilization of natural resources. The survey revealed that incomplete or no structuring of "visitor plants" in Brazil have resulted in conditions of incomplete satisfaction for tourists.

- . Labor - the "visitor plant" must be manned. Trained employees are required, just as in any other industry, to keep the machinery running - guides, hotel personnel, policemen, taxi drivers, customs agents, information and reception attendants and others. While the Confederation of Commerce has commendably initiated certain training programs (SESC and SENAC), the results to date have not met the needs of the situation.

c. Tourism Mentality

The proper mental attitude toward tourism requires three things:

- . Realization of the economic and social benefits to the host country.



- . Understanding and knowledge of the consumer.
- . Willingness by all parties concerned to cater to his needs and desires.

For a host country, Tourism Mentality is a sine qua non. It keynotes the success story of tourism in those foreign countries which receive heavy influxes of visitors from the U.S.

In many instances incomplete satisfaction with Brazilian touristic features is attributable to underdeveloped tourism mentality.

* * *

If Brazil wishes to take full advantage of its favorable tourism features, it is essential that the foregoing problem areas, both specific and overall, be dealt with effectively. Further, the appraisal of places visited revealed that in each instance there were certain features requiring corrective action before full tourism potential could be exploited. The situation, then, is one in which certain coordinated actions are needed internally in order to provide a sound basis for an increased flow of tourist travel from the U.S.



SECTION II

BASIC TOURISM NEEDS

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I I. B A S I C T O U R I S M N E E D S

Before Brazil can expect a large increase in U.S. visitors, it must proceed with the development of a modern "visitor plant." Even though it is possible now to make greater capital of certain attractions, their full exploitation relies on solution of the fundamental problems outlined in the preceding section.

These basic needs, i.e more paved highways, better sanitation, etc., will approach fulfillment as the infra-structure of the economy is strengthened. Based on the experience of other countries, it can be expected that tourism benefits will increase in geometric proportions to the growth of these basic facilities.

Inasmuch as the scope of this survey did not include the weighing of economic benefits to be derived from tourism investment as opposed to other investments, the following recommendations are not meant to advocate the diversion of Brazilian resources from their present uses to tourism.

It is recognized that requirements of a modern "visitor plant" must be related to the overall needs of the country, which is a Brazilian matter. Nevertheless, in order to give some direction to the solution of these problems, which Brazil may choose to deal with at a given time, it is well to outline some corrective measures.

A. Hotels

1. Consider the establishment of incentives to stimulate the attraction of investor capital into this industry:

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- Re-examination of present tax structure.
- Tax exemptions and accelerated depreciation rates.
- Import duty exemptions for needed equipment.
- Credit facilities - long term loans, low interest rates.

2. Upgrade hotel service standards:

- Study of American tastes and expectations.
- Training programs for staff.
- Establishment of minimum quality standards.
- Simplification of registration procedures.
- Renovation of interiors and furnishings.

B. Language

1. Use the 54 Binational Centers [REDACTED] for assistance in planning English language training courses covering all elements of the tourism industry.
2. Streamline the SENAC - SESC Programs and integrate its activities with that of above.

C. Transportation

1. Establish a car rental service in major cities.
2. Develop and install systems for better taxi control and airport transfers.

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3. Upgrade service standards on domestic airlines.
4. Modify the burdensome 150 per cent "ad valorem" impost on entry of private cars to Brazil.
5. Integrate the expansion of paved highways with tourism significance.

D. Sanitation

1. Establish and police minimum cleanliness standards for public places.
2. Initiate a street clean-up and repair "campaign" in Rio, including the Copacabana section and beach.
3. Modernize water and sewage systems.

E. Tours

1. Organize the dissemination of information about sights to see.
2. Integrate guided tours with hotel activities.
3. Train guides in proper presentation of sights.
4. Expand the number and scope of activities of reception centers at visitor entry points.

F. Customs and Entry Regulations

1. Separate the "true" tourist from other passengers, and expedite his entry.

2. Extend the tourist card period from 30 to 60 days.
3. Permit free entry of cameras and other tourist supplies.

G. Sports

1. Make facilities available to American tourists and inform them of this fact through printed literature, guides, hotels, etc.



SECTION III

TOURISM DEVELOPMENT PROGRAM

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I I I. TOURISM DEVELOPMENT PROGRAM

The appraisals of specific attractions revealed that certain places were relatively more capable of being upgraded quickly to meet the requirements of expanded tourism. Generally, these places possessed the combination of greater vacation appeal and ready facilities to handle more tourists.

While it would be possible, in most cases to realize an increase in tourist travel under the existing facilities and conditions, it would not serve the best interest of Brazilian tourism to promote these places without attending to the individual internal development needs.

The suggested improvements for places selected for initial exploitation, in general, would require less time and effort than the needs outlined for those places incorporated under the expanded program. While a few of the recommended improvements will require a long period of time to accomplish, they are nonetheless included because it is best to sustain developmental effort on those places whose innate tourist appeal is evident now.

A. Initial Exploitation

The selection of places for early attention may assist in establishing priorities, but the adoption and timing of the recommended measures is a matter of Brazilian decision.

1. The places selected for initial exploitation are:

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ARAXA

The impressively large hotel plant at Araxa possesses the features of a small "city in itself." When certain development needs have been complied with, visitors will not have to go outside the borders of the resort grounds to find first class recreation, entertainment, shops and thermal facilities. Araxa presently has the physical properties of being Brazil's most luxurious "country" hotel, with the added attraction of offering hydrotherapy - and, as such, is worthy of immediate tourist exploitation.

BAHIA (SALVADOR)

Through song and script Bahia has already been impressed on the minds of many Americans as a colorful, romantic place. This vague but pleasant image is supported by the actual tourism potential of Bahia and needs only to be strengthened and clarified through internal improvements and external communications. The blending of Bahia's unusual folkloric customs, soft, tropical climate and beautiful shore line scenery is unexcelled anywhere else in Brazil.

BELO HORIZONTE

During the time that Belo Horizonte is improving its own tourist resources it serves as the "doorway" to Ouro Preto. The city must therefore be prepared to handle the travelers who are on their way to the national monument, and who will probably wish to spend a day in Belo.



CAXAMBÚ

One of the most tourist-oriented, "small" vacation places in Brazil, Caxambú charmingly demonstrates another side of the country's tourism picture - the spa. An American who seeks mineral water therapy, or simply the adventure of "taking the waters" at a spa nestling in a quiet Brazilian valley, can find satisfaction in Caxambú now.

CAXIAS DO SUL

This town was included among short-term objectives inasmuch as it is close to Porto Alegre and Samuara Resort. It possesses the attributes of an industrial exposition building, wine plants and an annual wine festival, and would only require basic tourism improvements to become an agreeable "side attraction" for tourists.

IGUAÇU

The magnetism of a "world's largest" kind of place is patent. The spectacular dimensions of Iguazu Falls and near readiness of modern accommodations make it an important tourist attraction of Brazil.

MANAUS

The magic lure of "a trip up the Amazon" is strong tourism incentive; combined with comfortable, modern accommodations and well organized tours, this incentive can become a strong selling tool for bringing tourists to Manaus. Since the romantic overtones of visiting the Amazon region are already established in the minds of many Americans, it is a relatively simple matter to exploit them by directing the appeal of Manaus to the vacationer who is ready for adventure and something "different." There is a good "visitor plant" foundation

in Manaus which can be upgraded quickly to heighten excitement, entertainment and convenience for the American tourist.

OURO PRETO

Ouro Preto, preserved as a national monument, offers the interest value of a town-size museum filled with eighteenth century atmosphere. The lives of the original miners who search for black gold with a pick and a prayer; Tiradentes, the hero who fought for freedom; and Aleijadinho, whose magnificent sculptures belie the "little cripple's" handicaps, are joined and blended in the physical and spiritual character of Ouro Preto which makes it appeal to the romantic traveler as a place well worth visiting.

POÇOS DE CALDAS

A pleasant resort town and spa with experience in handling foreign visitors, Poços de Caldas will be ready, after conforming to recommended development needs, to receive American tourists interested in thermal treatments and easy living in an active, semi-European atmosphere. The manner in which the "big town" personality of Poços differs from Caxambú and Araxá adds variety to the spas of Brazil and enlarges the sphere of promotional possibilities.

PORTO ALEGRE

The inherent appeal of distinctive Gaucho cultures and traditions is a prime consideration in selecting Porto Alegre for immediate tourism development. In presenting "Gaucho life" to the North American tourist a link of familiarity is established in the



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tourist's mind with the great west of the United States, at the same time as a new interest in the Brazilian "cowboy" is awakened to reach the visitor's spirit of romance and adventure.

RIO DE JANEIRO - Petrópolis - Teresópolis

This city in Brazil known best by Americans is outstanding for its glamour and romance, and is currently the number one tourist attraction.

SAMUARA RESORT

A new, modern, "comprehensive" hotel with facilities for a variety of sports and recreations is unique in Brazil. Providing it meets and maintains high international tourism standards, it could grow in reputation until it becomes a well-known, stylish, holiday-adventure resort. Samuara is an attractive and necessary complement to the Porto Alegre tourist complex and was chosen, therefore, to aid in bringing southern Brazil into the tourism orbit.

SAO PAULO - Campinas - Santos (Guaruja)

With a reputation for being "the fastest growing city in the world" and a potpourri of European and oriental cultures, contributing interesting tourism resources, Sao Paulo is a vital demonstration of the adventure of progress in Brazil's economic and social advance. Tourists can find in Sao Paulo today, urban conditions which are in striking contrast to the more traditional ways of life apparent in other large Brazilian cities. As a part of the Sao Paulo tourism complex, Campinas and Santos (Guaruja) offer auxiliary attractions which serve to vary the interest and tempo for tourists.

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2. Recommended Development Needs

The appraisals revealed that there were language barrier problems in common to all areas, in greater or less degree. These all-inclusive needs are:

- Provide an adequate number of trained, English speaking guides for each Brazilian visitor area in which it is necessary to explain different points of interest.
- Encourage the placement of English speaking personnel in all hotels likely to be visited by American tourists, in such principal tourist contact positions as: reception, porteria, telephone switchboard, room service, housekeeping, restaurant and bar.

There exist certain development needs in the places selected for initial exploitation. These needs, as they apply to each specific place, follow:

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ARAXA

- 1) Operate hotel facilities, such as mineral baths, swimming pool, boite, room service, shops, etc. with closer regard for the needs, comfort and entertainment of the guests - pool and baths should be open a full day.
- 2) Provide better quality saddle horses and more interesting bridle paths.
- 3) Instill a brighter, gayer personality in the hotel through improved service, entertainment, reception, etc.
- 4) Provide charretes for sightseeing and taxi service.
- 5) Present arriving guests with an attractive folder which describes and locates all of the entertainment and health facilities of the resort.
- 6) Install a resident doctor to prescribe mineral bath treatment (at no charge) and inform guests of this service.
- 7) Improve and modernize lighting throughout the hotel to dispel gloomy appearance at night - plaza in front and gardens in rear should be illuminated at least until the boite closes.
- 8) Redecorate the boite to relieve drab appearance.
- 9) Modernize the airport terminal building so that first and last impressions of Araxa will be more pleasant.

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BAHIA (SALVADOR)

- 1) Build a first class 150-200-room beach-front hotel with a swimming pool.
- 2) Preserve and maintain the old colonial architecture in the city for its historical value and unique charm.
- 3) Modernize the port's physical facilities to provide greater convenience and comfort for disembarking ship tourists.
- 4) Persuade the Yacht Club to extend special guest privileges to American tourists - consideration should be given to charging them a reasonable fee.
- 5) Take steps to eliminate the nuisance charge of Cr\$10 for a hotel registration card.
- 6) Improve room service standards and housekeeping maintenance of the handsome, existing tourist hotel - establish more regular shopping hours at the hotel's gift store.
- 7) Encourage the construction, initially, of one fine night club-restaurant overlooking the beach and surf - imaginatively designed to make effective use of local folk color and the beautiful natural setting - featuring native dishes on a varied menu.
- 8) Install charrettes for sight-seeing and transportation to the beach.

- 9) Record the music of the rituals of Xarel Capoeira and Candomble, etc., and sell these through local souvenir dealers and hotels. Offer the exotic, music-making instruments (berimbaus, caxixis, agogos, etc.) for sale as souvenirs.
- 10) Stage "native entertainment," retaining as much authenticity as possible, with care to the comfort and convenience of American tourists and with attention to attractive costuming and setting.
- 11) Establish swimming and sunning zones on the beach for tourists, with "cocoanut soft drink" stands and concessions handling beach chairs, mats, towels, changing cabanas, etc.
- 12) Popularize for tourists the unusual native dishes by having them served regularly in the better restaurants.
- 13) Organize boating and fishing facilities for tourists.



BELO HORIZONTE

- 1) Reroute the approach from the airport to the center of town through a more built-up or rustically attractive neighborhood or improve the appearance of housing conditions along the present route, in order to give visitors a better first and last impression of Belo Horizonte.
- 2) Inform tourists through hotels and tour operators about the facilities of the sports club which are available to them - including a cocktail lounge for after dinner relaxation.
- 3) Organize a guided tour of the city, highlighting colonial and ultra-modern structures, birth places of prominent Brazilians, the industrial section, and a meal at a good churrascaria.
- 4) Offer first class bus and private limousine service to Ouro Preto.

CAXAMBÚ

- 1) Complete paving of road from Rio.
- 2) Build a golf course, improve quality of saddle horses and bridle paths.
- 3) Notify all visitors automatically that accredited local doctors are available to prescribe specific treatment in the medicinal baths.
- 4) Prepare information leaflets for hotel guests, and distribution at other points in Brazil, describing cures, different types of waters and other features of the hydrotherapy.
- 5) Add to safety and comfort features of the hydrotherapy: rubber mats in tubs; handles or rails to assist in levitation from tubs; talcum powder, hair dressing, and sterilized combs and hair brushes in dressing-rooms.
- 6) Advise hotel guests that bottle of water in bedroom is from the mineral springs.
- 7) Limit internal transportation to the use of charrettes, saddle horses, bicycles and pedestrianism, for the sake of novel appeal and "quiet charm."
- 8) Clean, paint and landscape those sections of town needing refurbishment (such as the market place).

CAXIAS DO SUL

- 1) Establish a number of "tourist approved" rest rooms, bars and restaurants for visitors to the Festa da Uva.
- 2) Organize and expand the Festa da Uva - convenient observation areas for tourists, a gay "Italian" party the evening of the parade with food and wine, group dancing, etc.
- 3) Provide English-speaking guides at Feira Industrial.
- 4) Package grapes for tourists in plastic bags marked "washed under sterile conditions..."
- 5) Organize visits to wine plants (Cantinas), using trained English-speaking guides.

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IGUACU FALLS

- 1) Open the Hotel Brasil.
- 2) Pave or at least smooth the road from airport.
- 3) Adjust flight schedules to provide greater frequency from Rio, Sao Paulo and Porto Alegre, as tourist volume increases.
- 4) Improve "walks" around the falls: smoother, easier-on-the-feet paths; better safety-railing precautions; a closer view of the falls; provide spray protection for outer clothing.
- 5) Establish souvenir, film supply and camera equipment shops in hotel - and a working photographer who can take pictures of visitors on request.
- 6) Develop cooperative procedures for viewing falls from Argentina side.
- 7) Organize fishing, boating and swimming facilities in vicinity of falls.
- 8) Arrange guide services in hotel to show falls and take visitors through the park.
- 9) Operate hotel transfer service from airport and place vehicles at disposal of guests for countryside sightseeing.

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- 10) Offer guests in hotel the services of a travel desk to aid in transportation arrangements.
- 11) Illuminate the falls at night with varied colored lights for dramatic effect, and to extend the viewing time.

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MANAUS

- 1) Construct a swimming pool, or at least a safe, clean "swimming hole" for use of hotel guests.
- 2) Establish a shop, either in the hotel or located nearby, selling the type of clothing that tourists probably associate with the Amazon region, pith helmets, khaki shorts, leather boots, sheath knives, etc.
- 3) Offer the tourist greater opportunity for organized "jungle life": walks in the jungle; hunting; camping overnight; native meals, celebrations and rituals, etc.
- 4) Exploit Indian handiworks for souvenir items; enlarge gift counter in hotel or open shops nearby.
- 5) Provide trophy-mounting facilities for fishermen and game hunters.
- 6) Equip a night club-houseboat on the Amazon, with native decor, music, dancers, for unique entertainment.
- 7) Establish film and camera supply shops for picture "hunters."
- 8) Reduce the cost (\$5.00 per hour) of the Rio Negro launch ride presently arranged by the hotel.
- 9) Clean up the old Opera House without disturbing its historical charm, and make greater use of it for theatrical presentations.
- 10) Expand hotel capacity by at least 100 rooms.

OURO PRETO

- 1) Complete the paving of road from Belo Horizonte.
- 2) Expand hotel capacity by 100 rooms.
- 3) Clean up streets - paint buildings without disturbing antiquity.
- 4) Improve local transportation means for greater sightseeing comfort - suggest charretes.
- 5) Distribute literature (in English) to visitors about the town's history, points of special interest, Tiradentes, Aleijadinho, etc. Prepare descriptive literature (signs, text) in English for museums, churches, etc.
- 6) Establish film supply and camera equipment shops for tourists.

POCOS DE CALDAS

- 1) Extend the airport's 2,700 ft. runway, for the safety of visitors and to prepare for larger aircraft in the future.
- 2) Supply arriving hotel guests with an attractive folder describing and locating all of the health, entertainment and shopping facilities of the town.
- 3) Encourage greater use of charretes for sightseeing and taxi service.
- 4) Inform visitors of the availability of accredited doctors, with cooperation from the town's medical department, who will prescribe mineral bath treatments.
- 5) Renovate the Country Club building to make it more of a tourist attraction. Attention to new landscaping would add much to the appearance of the Club grounds.



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PORTO ALEGRE

- 1) Capitalize on Gaucho culture and traditions:
 - . Restaurants serving churrasco dishes, etc., decorated in Gaucho themes.
 - . One or more dude ranch type resorts, within 10 miles of Porto Alegre.
 - . Souvenirs based on Gaucho personal utensils, music, clothing and items of the home.
 - . Rodeos and stock fairs, making use of football stadium.
- 2) Adapt existing retail outlets to tourist souvenir buying, and open special souvenir and gift shops.
- 3) Complete paving of road to Caxias do Sul.
- 4) Provide for adequate, reliable, reasonably priced chauffeured car rental and taxi service to handle local sightseeing and car trips to Caxias and Samuara.
- 5) Popularize local dishes for tourists - such things as: cafe de colonia; galetto al primo canto with polenta and radiche salad; churrasco com farofa and typical campanha sauce.
- 6) Advise tourists of Class A restaurants with Italian or German kitchens through guides, hotels, travel agents, etc.

- 7) Create one or more night clubs - possibly with Gaucho motifs and entertainment, or European style atmosphere, borrowing from the Italian and German backgrounds of the population.
- 8) Organize fishing facilities for tourists.
- 9) Notify tourists that golf club is available, through hotels, travel agents, guides, etc.

RIO DE JANEIRO - Petrópolis - Teresópolis

- 1) Repair the sidewalks of Copacabana and keep them in a state of cleanliness which will do justice to their unique artistic design.
- 2) Improve general sanitation conditions, relieving first those which can have direct negative effects on the visitors' sensibilities (open sewage, inadequate garbage disposal, etc.).
- 3) Organize sports facilities in Rio so that tourists can more easily avail themselves of the many outdoor recreations suggested by the beautiful natural settings, i.e., tennis, golf, horseback riding, boating, fishing, skin diving, water skiing, hiking, etc.
- 4) Place fare notices in all taxis explaining (in English) the meter system being used, taxi zone procedures, the reasons for raising numbered discs on the meter, and other features of public taxi service which are peculiar to Rio - so that the passenger-tourist feels more confident that he is being thoughtfully and honestly handled. Expand on the reassuring police procedure of recording taxi transfers from Santos Dumont airport to town and enact or activate legal controls to assure foreign travelers reliable, available taxi service throughout their stay in Rio.

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- 5) Train special detachments of bilingual policemen, who will wear an identifying arm band, to patrol tourist-frequented areas and provide visitors with the courtesies that will make them feel safe and welcome.
- 6) Exploit more fully the beautiful islands of Guanabara Bay; conduct small groups on comfortable full-day boat excursions stopping at one or more of the islands for swimming, sight-seeing and dining.
- 7) Elevate the service standards in all tourist contact areas in Rio, i.e., hotels, restaurants, visitor attractions, etc. - make the tourist feel well attended.
- 8) Stage some aspects of Carnaval in such a way and in such places that the tourist can enjoy the "show" with greater ease and understanding and without facing the risk of being "closed out" by the din and sweep of this mighty spectacle. It must be remembered that the tourist is a spectator rather than a participant.
- 9) Use more Braziliana in the presentation of night life entertainment, i.e., music, dances, costumes, decor, etc. Tourists are in Brazil to experience those "different" things which are distinctively a part of the Brazilian mind and heart.

- 10) Encourage the construction of a dramatic night club-restaurant so located and designed as to capitalize on Rio's proudest physical assets - the crescent curve of Copacabana, the sea, the mountains, the lighted city at night - such an entertainment place overlooking and "etched" into the magnificent setting of Rio could well be named "The Carioca."
- 11) Give consideration to "importing" showmen from the U.S. (even Paris does this) to produce new, extravagant night club reviews which will enliven the atmosphere and reinforce the image of Rio as the brightest, gayest of Latin American cities.
- 12) Make it possible for tourists to try, in first class restaurants, well prepared local dishes from various regions of Brazil.
- 13) Renovate visitor accommodations (souvenirs, eating, rest rooms, etc.) at Urca and Sugar Loaf to improve appearance and raise the standards of cleanliness; print safety cautions in English as well as Portuguese in the cable cars.
- 14) Build an escalator or elevator of some type, at Corcovado, to comfortably raise visitors the several hundred steps from the automobile parking area to the statue.
- 15) Encourage the construction of a modern, resort-type hotel in Rio (swimming pool, nite-club, commanding view of ocean, etc.) with a capacity of 500 rooms.

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- 16) Train additional English speaking guides and equip them with prepared "talks," on various points of interest in Rio, so that they are well informed on their subject and can reply to questions with authority.
- 17) Create another tourist-interest activity by making it possible for visitors to enjoy (exclusive of conducted tours) "country dining" on the outskirts of Rio - more and better restaurants of the Esquilos and Bar Bem type. Reliable taxi or special limousine transportation must be arranged by the restaurants, hotels, or travel agents.
- 18) Supply hotels and other tourist contact services with an up-to-date list of "approved" dining places in Rio, including "how to get there" directions and descriptions of food specialties, for distribution to tourists.
- 19) Expedite and streamline customs entry procedures to eliminate delays, confusion and other negative impressions at the very outset of a tourist holiday, i.e.: separate "true" tourists from other travelers; equip customs agents with a working English vocabulary; permit free entry of a larger variety of obviously personal articles; institute welcoming activities such as cool refreshment, and personal greetings from an official tourism representative.
- 20) Give consideration to the economic and psychological benefits of creating a free port shopping area in Rio which

could be operated by a consortium of Brazilian merchants who might return a percentage of their revenues to the Government - Brazilian gem stones could be the dramatic highlight of the "shop," along with imports and other national products.

- 21) Enlist the cooperation of appropriate retail outlets and the manufacturer to bring to the attention of tourists the excellent quality and reasonable cost of Brazilian cigars.
- 22) Use horse-drawn carriages for organized scenic tours of Petrópolis, including Quitandinha, Imperial Museum, beautiful homes.
- 23) Improve service and food standards at Petrópolis' resort hotel. Publicize in Brazil the hotel's great variety of attractions, as a place to spend week-ends while vacationing in Rio, particularly during the hot season.
- 24) Construct new, modern resort hotel in Teresópolis, with capacity of 100 rooms. Upgrade service and hygienic standards of existing hotels in area. Publicize Teresópolis as a week-end retreat to escape the heat.
- 25) Improve security factors in Teresópolis; well-lit streets, policemen in sight, etc.

- 26) Organize existing sports facilities in both Petrópolis and Teresópolis - golf, swimming, tennis, horseback riding, for more ease of utilization by tourists.

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SAMUARA RESORT

- 1) Improve road connections from Caxias.
- 2) Establish hotel "limousine" service from airport in Caxias.
- 3) Capitalize on the newness, varied facilities, and naturally beautiful environs of Samuara to make and keep it a first-class Brazilian resort, inviting to international travelers, honeymooners, etc.
- 4) Make full use of Gaucho color, food, entertainment, etc. to give Samuara distinctive appeal. Provide for large outdoor barbecues, Gaucho style.
- 5) Schedule sports and social events of significance to American audiences (covered by fashion, sports, etc., press groups from the U.S.).
- 6) Preserve the naturally beautiful setting of Samuara by establishing zoning restrictions which will prevent the encroachment of commercial structures, home building developments, etc.
- 7) Coordinate flight schedules from Rio to Porto Alegre to Caxias for those who don't want to spend time in Porto Alegre - or make arrangements to amuse "stopover" travelers in Porto Alegre.
- 8) Provide "shopping facilities" in hotel, and other services like a travel desk, cable office, golf and tennis pros, etc. for convenience and comfort of guests.

SAO PAULO - Campinas - Santos (Guaruja)

- 1) Strengthen and emphasize those tourist attractions which are generally associated with a metropolis such as Sao Paulo, whose character is that of a modern, cosmopolitan, commercial city; fine hotels with first class service standards; excellent restaurants with varied menus; handsome night clubs with exciting entertainment; beautiful shops with a wide selection of gift and souvenir merchandise at "bargain prices"; good theatrical presentations of musical reviews featuring typical Brazilian music, dances and pulchritude; special race track events drawing fashionable attendances; major international sport events held in the stadium, etc.

- 2) Bring tourism and municipal authorities together to decide whether one of these "attractions," all of them, or additional ones will serve as focal point for creation of a new tourist personality for Sao Paulo. (A reputation for being Chicago-like does not produce the greatest appeal for the American tourist - particularly if he is from Chicago - nor is it worthy of Sao Paulo's distinctive tourist assets which must be extracted and exploited more fully.)

- 3) Develop a number of organized, dependable tours covering the many points of interest (including night life) in Sao Paulo, with half-day visits to Campinas and overnight excursions to Santos-Guaruja. Tour information should be available to tourists in printed form with prices noted.

- 4) Vivify the atmosphere of the Parque Ibirapuera through use of showmanship - pretty hostess guides (English speaking), music, games, restaurants, dancing at night, special events, etc.
- 5) Provide tourists with a printed guide to the Parque, locating and describing various exhibits and containing comments on other points of interest.
- 6) Make the interesting Casa do Bandeirante museum more of a "real-life" experience by having a few "early settlers" in appropriate costume operating some of the crude farm machines, i.e., sugar cane juicer, corn masher, etc.
- 7) Time the "venom milking" demonstrations at Butantan snake farm (if necessary, increase frequency) to coincide with visits of tourist groups.
- 8) Present working demonstrations of harvesting, washing, pulping, hulling, grade separating, etc. at the coffee farm visited in Campinas, for the tourists' interest and edification - offer free coffee of different types.
- 9) Popularize through frequent and standardized appearance on menus the tasty Sao Paulo regional dishes which are of local origin or have their source in the foreign background populations, i.e., "virado a paulista," cuscuz-paulista, tartaruga, bataiak, green lasanha, etc.

- 10) Provide "drive yourself" cars for the tourist who wishes to be on his own and transport his family to Santos for a day or two. Tour representatives in that city must receive the traveler and see to his comfort and entertainment.
- 11) Inform tourists, when they are in Sao Paulo, of the attractions of Santos-Guaruja and promote this side trip, laying particular emphasis on the beaches, scenic beauty, and the entertaining restaurant-club at Jequiti-Mar.
- 12) Increase the trip frequency of ferry service between Santos and Guaruja to reduce congestion and delays on peak movement days - or give consideration to the idea of constructing a bridge between the two points.
- 13) Stimulate night life in Santos - at least the hotel boites should be open and offer some form of entertainment.
- 14) Select safe, clean sections of beach in Santos for tourists and, if proximity permits, arrange for the hotels to provide all the essentials (beach chairs, mats, towels, light food and drink, etc.) for comfortable, enjoyable days of sunning and swimming - otherwise set up beach concessions to handle these essentials.
- 15) Simplify and expedite customs procedures in Santos whereby travel agents will be able to board ships easily to greet passengers, and the passengers in turn will be subjected to a minimum examination inconvenience in disembarking for a visit of Santos and Sao Paulo.

- 16) Organize boating and fishing facilities for tourists in Santos.
- 17) Install charretes in Santos and Guaruja for sight-seeing.

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B. Expanded Program

The appraisals of specific attractions disclose that certain places - in relation to the "basic tourism needs" and the total touristic perspective - can only be developed over a period of time. Although they possess, in varying degrees, some good tourist features and should begin their development plans concurrent with those of the places selected for initial exploitation, it is felt that their full development cannot be achieved as rapidly.

1. Expanded Projects Include:

- . Belem
- . Brasilia
- . Cabo Frio
- . Campos de Jordao
- . Maquine
- . Morro Velho
- . Paulo Afonso
- . Ponta Grossa
- . Recife
- . Torres

2. Recommended Development Needs

BELEM

- 1) Modernize more of the facilities (air conditioning for bedrooms, new furniture, plumbing, decor, etc.) of the existing tourist hotel.

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- 2) Introduce tourists to the rugged beauty and abounding wild-life of Marajo Island - erect guest house, organize tours, arrange hunting "expeditions", etc.
- 3) Repair the paved road from airport to town and improve appearance of the approach into town.
- 4) Produce some lively entertainment for tourists, drawing on folklore customs - also some recreational activities like river sailing and fishing.

BRASILIA

Build a first-rate "visitor plant," along with the other modern structures of Brasilia, equipped to handle tourists of different nationalities.

CABO FRIO

- 1) Complete paving of road to Cabo Frio, and pave or at least smooth the roads on the Cape.
 - 2) Elevate the general sanitation and comfort standards to meet the expectations of international travelers.
 - 3) Build some first class hotels or motels on the beach.
 - 4) Organize fishing, boating, skin diving facilities and other outdoor activities which would be sufficiently different and appealing to draw tourists from Rio on a side-trip weekend.
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CAMPOS DE JORDÃO

- 1) Complete paved highway from Sao Paulo.
- 2) Construct airport.
- 3) Prepare thermal facilities.
- 4) Expand and organize recreational features.

MAQUINE

- 1) Pave the road from Belo Horizonte.
- 2) Provide greater tourist interest, comfort and convenience, i.e.: safe, carefully laid-out route passages in the caves; adequate, constant lighting throughout; food, refreshment and souvenir stands near the caves; printed literature, picture post-cards and "albums", signs and other markers explaining and illustrating all features of special interest.

MORRO VELHO

- 1) Pave the road from Belo Horizonte.
- 2) Plan tours of the mine (providing it continues in operation) and processing plant so that a group of four or five people are able to hear the guide above the noise of the machinery - portable electric loud-speaker, megaphone, use of large written cards, etc.

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- 3) Offer novel, inexpensive, souvenir gold items for sale, made from "freshly mined gold."

PAULO AFONSO

- 1) Organize regular tourist group visits through the hydro-electric plant.
- 2) Relieve inconvenience and discomfort of transportation means to and within Paulo Afonso.
- 3) Organize sports recreation facilities.
- 4) Improve techniques for "showing" the Falls.
- 5) Create a special "personality" for Paulo Afonso which will make its appeals something different from those of Iguacu Falls, and therefore non-competitive with the larger scale display.

PONTA GROSSA (VILLA VELHA)

Study the historical, legendary and aesthetic significance of the rock formations from the perspective of international tourist interest; and then prepare a prospectus containing the tourism exploitation intentions of Villa Velha.

RECIFE

- 1) Improve service standards in the beach front hotel.
- 2) Increase the safety factor of jangada sailing and organize a "fleet" of these modified craft for tourist entertainment: fishing, skin diving and sailing.
- 3) Organize the presentation of folklore dances for tourists.
- 4) Create some night-time entertainment for tourists making use of local color and customs.
- 5) Determine the tourist "sales theme" for Recife (surf and sun, sailing, fishing, folklore, etc.) and build up corresponding tourist attractions emphasizing the "theme", i.e., boats for hire; night clubs with jangada motifs and "native" entertainment; complete facilities for fishing; full range of beach resort services, swimming pool, beach chairs, cabanas for changing, refreshment stands; dramatized "return of the jangada fishing fleet," etc.

TORRES

- 1) Schedule regular air flights from Porto Alegre.
- 2) Build a resort hotel overlooking the ocean with complete services, and appealing in design and character to the international traveler.

The tourist development program should be one of sustained effort. Just as in the construction of an office building where the alert agent is renting space while the floors are being laid and the wiring is being installed, so should the initial exploitation tourism projects of Brazil be organized and promoted concurrent with the progressive achievement of "basic tourism needs" which in turn will lead to full scale tourism encompassing the expanded projects.

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SECTION IV

IMPLEMENTATION OF PROGRAM

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I V. IMPLEMENTATION OF THE PROGRAM

This section makes recommendations covering the previously mentioned overall tourism structure of Brazil.

A. Tourism Management

It is recommended that an official national body be established in Brazil that can provide leadership in the vital management functions of organizing, planning, integrating and measuring the entire tourist development program.

1. Authority and Responsibility

The scope of authority and responsibility that could be assigned to such a body would include:

- . Long-range planning for tourist development, establishing priorities and initiating programs.
- . Coordinating the execution of approved internal programs with all groups concerned - hotels, carriers, banks, etc.
- . Preparing and administering official tourism budgets.
- . Recommending needed legislation or other action to develop and maintain the "visitor plant."
- . Integrating the development of tourist attractions with the advancement of public facilities.

- . Establishing minimum quality standards for hotels, sanitation, transportation, communication or other tourist elements.
- . Blending the efforts of state and municipal tourism departments and tourism associations.
- . Executing external advertising and public relations campaigns through appointed agencies in the U.S.
- . Measuring the results of approved programs by establishing statistical systems and controls covering number of visitors, origin, expenditures, time spent, etc.

2. Organization Structure

The organization of this national body should be such as to provide for integrated planning and action on the part of all tourism interests in Brazil, so that its internal development needs can be effectively dealt with. At the same time the structure should provide for the coordinated execution of the external advertising, public relations and sales promotion activities in the United States. With this concept in mind the following structure is recommended.

a. Board of Directors

The Board of Directors should consist of representatives from the various syndicates and associations whose interests are directly concerned with tourism. These would include representatives from hotels, transportation (both foreign and domestic), travel agents, and various commercial

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organizations. Also, because of the needed integration with governmental public works, it is essential that representatives of the various federal agencies, as well as banking interests, be included on the Board. The Board would concentrate initial emphasis on the internal tourism development needs and provide for coordination of the various elements of the tourism industry who can contribute to that end.

b. Headquarters Administrative Staff

A skeleton administrative staff will be needed to effectively implement the broad programs which are approved by the Board of Directors. This staff should be headquartered in the nation's capital and should consist of an Executive Director, who should automatically be a member of the Board, two or three assistants and needed secretarial help.

The primary responsibility of this staff would be that of planning, coordination and implementation, so that the necessary programs, both internal and external, are properly phased and brought together so that maximum results are realized. The staff would initiate necessary action, follow up to ensure that action is taken and measure the results of approved programs.

While no specific reporting relationship for the Executive Director is recommended, it is suggested that this position be placed high enough in the government hierarchy so that its voice can be heard when major policy decisions are made.

c. United States Representation

Because there exists so little information about Brazil in the U.S. travel industry, it is important that representation be established in the United States to fulfill this need.

1) Short Term

It is recommended that this representation be established in New York City initially. Its primary function would be:

- . To coordinate the efforts of the agencies appointed in the United States to handle the advertising, public relations and sales promotion activities.
- . To make available to the United States travel industry factual and interesting data in the form of colorful brochures, pamphlets and posters.
- . To effectively sell Brazil to the various segments of the travel industry that have an influence on potential United States overseas travelers.
- . To provide a central source for information and dissemination of factual material on Brazil as a vacation opportunity.

The head tourist representative in New York would report directly to the Executive Director of the national tourism

body. In addition, there should be at least two "sales-merchandising" men whose primary function would be to personally contact travel agents, airline and steamship company executives, etc., presenting to them complete plans and details on all aspects of travel and vacations in Brazil.

2) Long Range

In the future, provision should be made for establishing additional tourism representatives in the following major markets:

- . Chicago

- . Miami

- . Los Angeles

Personnel in these places would perform similar functions to those of New York.

With the above type of organization structure the broad policies and programs, along with a supporting budget, could be established at headquarters of the national body. Many of the details of execution could be delegated to the tourism representation in New York where decisions can be reached quickly.

In order to provide for the most effective implementation and communication, the United States agencies appointed to handle the various aspects of this program could establish their counterpart functions in accordance with the recommended organization plan.

B. Tourism Machinery

1. Capital

It is recommended that a committee on tourism be established as part of the National Economic Council to study the capital needs of tourism in relation to the overall economic development objectives of the country, and to work with national and international monetary organizations in the pursuit of tourism goals. Members of the national tourism body would participate on this committee.

2. Facilities

A Tourism Facilities Committee should be established as part of the national tourism body to make on-the-spot appraisals of current and projected tourist attractions, recommend needed improvements, and integrate them with the growth of public facilities.

3. Labor

A comprehensive training program should be initiated by the national tourism body for all employees of the tourism industry, with particular emphasis on English-speaking facility and study of American tastes. Integration of this program with the Binational Centers is urged.

C. Tourism Mentality

A continuing public relations program within Brazil, aimed at the inculcation of proper tourism mentality in all segments of the tourist industry and the general public, is recommended.

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An internal development program of the scope recommended earlier will only work satisfactorily when all of its participants can understand and communicate its objectives.

A few of the suggested publics and communicator groups that would have to be reached in an internal communications program are:

Editors

Educators

Builders and Architects

Union Leaders

Union Members

Legislators

The Clergy

Transportation officials and employees

Hotel officials and employees

Local travel agents and guides

Students

The following broad suggestions for a tourism orientation program in Brazil, to be conducted by the national tourism authority, are intended as guide-lines. If adopted in whole or part, they should be worked into a full-scale plan with assistance and counsel from the public relations group which has been assigned responsibility for the external program.

1. Establish a Committee on Tourism Orientation as a Part of the National Tourism Authority Whose Responsibility Will Be to:

- a. Explain the potential benefits of international tourism to the tourist industry in Brazil.
 - b. Inform the representatives of the tourist industry as to the tastes and expectations of the foreign traveler.
 - c. Explain and keep before the Brazilian public eye the benefits of tourism to the social and economic status of the country.
 - d. Enlist the interest and cooperation of the public in making tourists feel welcome in Brazil.
2. Organize a Tourism-Training Exchange Procedure Between the United States and Brazil Whereby:
- a. Key members of Brazil's tourist industry visit the U.S. to study tourist-handling techniques and tourism promotion methods.
 - b. Travel authorities from the U.S. (both American and foreign) are invited to Brazil to address various tourism groups and explain their operations.
3. Unify the Aims and Actions of Brazil's Tourism Industry by:
- a. Keeping all members informed of current and new practices.
 - b. Expanding the operations of SESC and SENAC in order to improve and standardize tourist-service training procedures.

4. Institute and Maintain Minimum Tourism Standards Through the Use of:

- a. Visible "approved for tourists" commendations issued under the auspices of an official tourism body.
- b. Review of licensing and other legal, quality control measures where applicable in tourist contact areas.
- c. A system of regular inspections agreed upon and with enlightened cooperation of members of the tourism industry.

5. Coordinate Internal Tourism Orientation Program with External Public Relations in Such a Way That:

- a. Rapid improvement in certain Brazilian tourist areas can be made capital of in the U.S.
- b. Special promotions in the U.S. leading to heavier traffic or influential visits to a certain area will be "protected" by an informed, trained "visitor plant" group with an alert Tourism Mentality.

A program of this nature calls for a catalytic symbol or slogan which can readily be identified with the overall objectives of the internal program. As in the case of "Operation Bootstrap" which identifies the program of Puerto Rico, such a slogan comes to have meaning to editors, writers, businessmen, government officials and the public at large. It comes to be recognized and quoted. It forms an ideal combination of words for the signature of an advertisement, a headline on a newspaper, a reference in a speech, a caption on a photograph.

Such a slogan would indicate what Brazil is driving towards. It would be a promise of better things to come. It should be a phrase employing action words - for example, "Hospitality Helps Brazil."

"In summary, international travel is big business and a superlative foreign exchange earner, is a form of international trade in which new countries can readily participate, is a stimulant to other trade and capital investment, and serves to reduce the dollar gap and the need for economic assistance."

Clarence B. Randall,
Special Assistant to the President,
International Travel Report
to the President of the United States

APPENDIX

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Table 1.

Temperature and Rain in State Capitals of Brazil

(Yearly Average)

CAPITALS OF THE STATES	T E M P E R A T U R E						R A I N		
	Diurnal Average		Absolute Maximum		Absolute Minimum		Rainfall		Number of Rainy Days
	°C.	°F.	°C.	°F.	°C.	°F.	mm.	Inches	
Manaus	26.6	79.8	38.8	100.1	17.6	63.7	1,995	78.5	167
Belem	25.6	78.2	35.1	95.2	18.5	65.3	2,805	110.8	250
Sao Luiz	26.5	79.7	34.8	94.7	19.6	67.3	2,807	82.2	150
Teresina	26.8	80.3	39.0	102.3	13.8	56.9	1,475	58.1	114
Fortalesa	26.3	79.4	36.0	96.8	9.0	49.1	1,191	46.9	113
Natal	26.2	79.2	32.7	90.9	16.9	62.4	1,525	60.0	128
Joao Pessoa	25.1	77.2	34.5	94.1	16.8	62.2	1,717	67.6	207
Recife	25.7	78.3	33.4	92.2	17.8	64.2	1,537	60.5	204
Bahia (Salvador)	24.8	76.7	33.6	92.5	17.0	56.5	1,854	73.0	160
Vitoria	23.2	73.8	37.2	99.0	9.3	49.7	1,431	56.4	153
Rio de Janeiro	22.7	72.9	35.0	103.3	10.2	50.4	1,050	41.4	140
Sao Paulo	21.9	71.4	41.8	107.2	5.0	41.0	2,083	82.0	147
Curitiba	16.2	61.2	34.6	94.3	6.3	44.0	1,352	53.2	179
Goiania	23.9	75.1	37.8	100.1	7.2	45.7	1,684	66.4	113
Cuiaba	25.6	78.2	39.8	103.1	1.2	34.2	1,394	55.0	137
Belo Hori- zonte	20.7	69.3	35.2	95.5	1.2	34.2	1,472	58.0	172
Flori- anopolis	20.5	69.0	36.0	96.8	1.3	34.4	1,351	53.2	139
Porto Alegre	19.1	66.4	40.4	111.2	0.7	33.3	1,242	48.8	124

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Table 2.

Number of Hotels and Rooms Available in Selected Cities

				Number of Rooms Available					
				Class "A" Hotels			Class "B" Hotels		
CITY	Hotels			Double With Bath	Double Without Bath	Per Cent of Total Rooms Without Bath	Double With Bath	Double Without Bath	Per Cent of Total Rooms Without Bath
	TOTAL	Class "A"	Class "B"						
Rio de Janeiro	47	32	15	3,048	-	-	970	2,612	73%
Sao Paulo	28	10	18	1,890	-	-	881	-	-
Belo Horizonte	12	6	6	769	-	-	470	-	-
Porto Alegre	9	3	6	461	-	-	275	375	58
Santos	8	4	4	666	87	12%	133	246	65
Bahia	4	2	2	231	50	18	99	17	15
Recife	3	3	-	279	57	17	-	-	-
Belem	3	3	-	85	-	-	17	105	86
Manaus*									

*This information was not reported for Manaus.

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Table 3.

Occupancy Rate of Brazilian Hotels

CITY	Annual Average Occupancy Rate		Months of Highest Occupancy (Class "A" and "B")		Months of Lowest Occupancy (Class "A" and "B")	
	Class "A" Hotels	Class "B" Hotels	Months	Average Occupancy Rate (Per Cent)	Months	Average Occupancy Rate (Per Cent)
Rio de Janeiro	70%	*	January, February, July	100%	June, November	65%
Sao Paulo	65	68%	January, February, March, July, December	80	May, June, August, Sept., October, November	50
Belo Horizonte	*	*	<u>1/</u>		<u>1/</u>	
Porto Alegre	80	75	July, November, December	90	February, March, August	73
Santos	40	40	January, February, July	85	June, August, Sept. (Rainy Season)	10
Bahia	80	70	<u>1/</u>		<u>1/</u>	
Recife	75	-	January, February, March	90	June, August, September	60
Belem	90	95	<u>1/</u>		<u>1/</u>	
Manaus	*	*	*	*	*	*

1/ No seasonal variation; rate remains consistently high throughout the year.

* Not reported.

Table 4.

Adequacy of Existing Hotel Facilities (Rooms)

CITY	Can Handle Present Traffic		Plan to Build More Rooms		Number Planned	Completion Dates
	Yes	No	Yes	No		
Rio de Janeiro	X			X		
Sao Paulo	X		X		450	Not known
Belo Horizonte	X			X		
Santos	X			X		
Porto Alegre		X	X		400	Not known
Recife		X	X		240	Not known
Bahia		X	X		120	(Lack the funds to build)
Belem		X	X		160	Not known
Mangus*						

*Not reported.

Table 5.

Price Rates of Brazilian Hotels

(In Cruzeiros)

CITY	Class "A"				Class "B"			
	Double		Single		Double		Single	
	Minimum	Maximum	Minimum	Maximum	Minimum	Maximum	Minimum	Maximum
Rio de Janeiro	*	*	200	550	*	*	*	*
Sao Paulo	550	750	400	600	380	500	280	350
Belo Horizonte	*	*	*	*	*	*	*	*
Santos ^{1/}	850 ^{2/}	1,200 ^{2/}	240	400	*	*	*	*
Porto Alegre	550	750	300	500	400	500	200	300
Recife	470	1,200	330	1,200	<u>3/</u>			
Bahia	650	800	400	600	600	800	350	500
Belem	-	710	-	510	330	800	190	450
Manaus	*	*	*	*	*	*	*	*

* Not reported.

1/ This city is the only one reporting a seasonal variation in prices: rates run 20 to 25 per cent lower in June, August and September.

2/ American plan, includes three meals.

3/ No Class "B" hotels in Recife.

Table 6.

Extent of Air Conditioning and Swimming Pools Available in Brazilian Hotels

CITY	Air Conditioning		Swimming Pools		
	Hotels With	Number of Rooms	Yes	No	Number of Pools
Rio de Janeiro	8	48	X		2
Sao Paulo	4	*		X	-
Belo Horizonte	*	*	*		
Porto Alegre	1	16		X	-
Santos	2	*	X		1
Bahia	0	-		X	-
Recife	2	24		X	-
Belem	1	5		X	-
Manaus ^{1/}					

*Not determined.

^{1/} Not reported but it is estimated that there are about 30 air conditioned rooms in Manaus.

Table 7.

English-Speaking Personnel in Hotels

CITY	Number of Hotels Reporting	Telephone Operators		Attendants		Doorkeepers		Maids		Headwaiters		Barmen	
		Hotels With	Number	Hotels With	Number	Hotels With	Number	Hotels With	Number	Hotels With	Number	Hotels With	Number
Rio de Janeiro	17	13	23	17	48	15	40	11	26	11	33	15	33
Sao Paulo	20	9	15	17	44	16	34	13	86	10	26	16	25
Belo Horizonte	0												
Porto Alegre	3	2	3	3	11	3	7	2	9	2	4	3	3
Santos	0												
Bahia	2	0	-	1	4	1	3	1	1	1	4	1	2
Recife	3	0	-	3	9	2	5	1	1	2	3	3	5
Belem	1	1	4	1	4	1	4	0	-	1	1	1	1
Manaus	1	0	-	1	1	0	-	0	-	1	2	1	1

Table

Plans for Highways

Highway	Km. to Construct	Cost Per Km. (Cruzeiros)	Km. to Surface	Cost Per Km. (Cruzeiros)
Floresta da Tijuca	-	-	22	Cr\$6,000,000.-
Paineiras-Alto da Boa Vista	-	-	16	6,000,000.-
Rodovia Litoranea	96	-	96	25,000,000.-
Belo Horizonte-Ouro Preto	-	-	107	-
Rio de Janeiro-Petropolis Terezopolis	-	-	115	-
Eng. Passos-Parque do Itatiaia-Caxambu	-	-	68	-
Vidinha-Ponte Preta S. Lourenco-Itajuba	75	-	89	7,000,000.-
Itajuba-BR2-Rodovia P. Dutra	-	-	-	-
Itajuba-Pocos de Caldas	-	-	176	6,000,000.-
BR76-Km.14-Campos do Jordao	27	-	33	3,500,000.-
BR2-Pinda-Piracuama-Campos do Jordao	33	-	33	8,500,000.-
Sao Paulo-Linhaoia-Pocos de Caldas	-	-	-	-
BR2-Sao Paulo-Curitiba-Lajes-Porto Alegre	-	-	-	-
Porto Alegre-S. Gabriel Uruguaiana-Panamericana	435	Cr\$2,000,000.-	635	4,500,000.-
S. Gabriel-Bage-Acegua Panamericana	90	2,000,000.-	150	4,500,000.-
Alternative Route-Bage a BR37-Estadual	-	-	171	3,000,000.-
Osorio-Torres	-	-	104	4,500,000.-

Necessary funds for accelerated execution of the construction

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8.

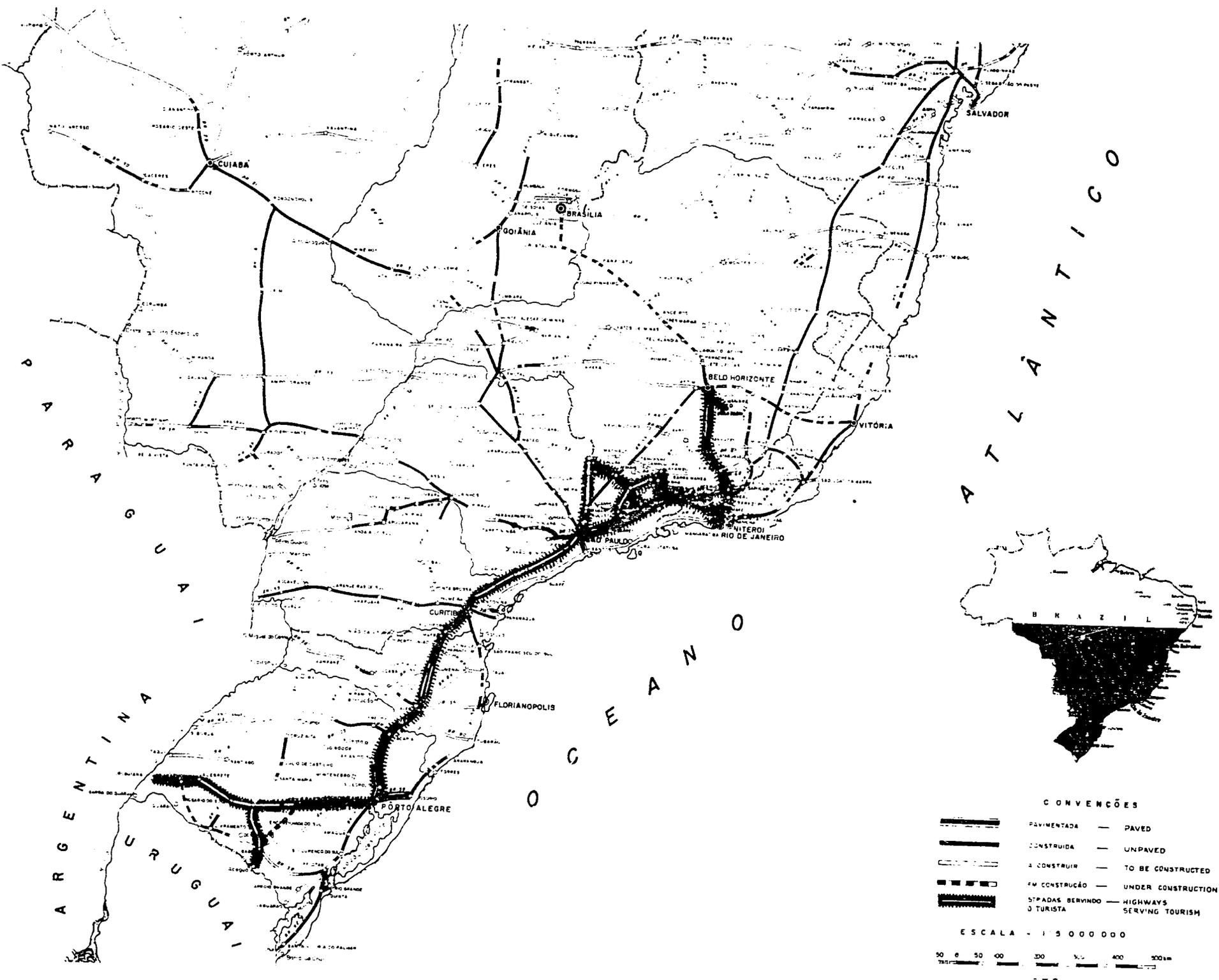
Serving Tourism

Total Extension	Total Cost (Cruzeiros)	Date of Completion	Funds
22	Cr\$132,000,000.-	-	None.
16	96,000,000.-	-	None.
96	2,400,000,000.-	-	None.
107	-	1959	Surfacing Plan-D.E.R.-Minas.
115	-	1959	D.N.E.R.-Five Years Plan.
68	-	1959	D.N.E.R.-Five Years Plan.
89	559,000,000.-	-	None.
79	-	1958	D.N.E.R.-Five Years Plan.
176	1,056,000,000.-	-	None.
33	100,000,000.-	-	Only Cr\$10,000,000 for 1958.
33	300,000,000.-	1963	D.N.E.R.-Five Years Plan.
286	-	1959	D.E.R.-Sao Paulo.
1230	-	1960	D.N.E.R.-Five Years Plan.
635	3,760,000,000.-	-	D.N.E.R.-Five Years Plan-for roadbed construction only.
150	855,000,000.-	-	None.
171	513,000,000.-	-	None.
104	468,000,000.-	-	None.

and surfacing of above program Cr\$9,374,000,000.-

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PLACES SURVEYED

- 1) Rio de Janeiro
- 2) Petrópolis
- 3) Teresópolis
- 4) Porto Alegre
- 5) Samuara Resort
- 6) Caxias do Sul
- 7) Torres
- 8) Iguaçu
- 9) Ponta Grossa
- 10) Cabo Frio
- 11) Caxambú
- 12) Campos de Jordão
- 13) Belo Horizonte
- 14) Morro Velho (Belo)
- 15) Maquine (Belo)
- 16) Ouro Preto
- 17) Araxa
- 18) Poços de Caldas
- 19) Sao Paulo
- 20) Campinas
- 21) Santos
- 22) Guarujá
- 23) Manaus
- 24) Belem
- 25) Recife
- 26) Salvador (Bahia)
- 27) Paulo Afonso

HOTELS

GENERAL QUESTIONNAIRE

I. How many Class A hotels are there in Rio de Janeiro, i.e., those that can satisfy international tourists?

a) South Zone: how many?

which? (name them)

b) Downtown and Flamengo: how many?

which? (name them)

II. How many Class B hotels are there in Rio de Janeiro?

a) South Zone: how many?

which? (name them)

b) Downtown and Flamengo: how many?

which? (name them)

III. How many rooms and apartments are there in Class A hotels?

Rooms:

Apartments:

a) South Zone:

Double (with bath?
(without bath?
(total?

Single (with bath?
(without bath?
(total?

b) Downtown and Flamengo:

Double (with bath?
(without bath?
(total?

Single (with bath?
(without bath?
(total?

[Handwritten signature]

IV. How many rooms and apartments are there in Class B hotels?

Rooms:

Apartments:

a) South Zone:

(with bath?	(with bath?
Double (without bath?	Single (without bath?
(total?	(total?

b) Downtown and Flamengo:

(with bath?	(with bath?
Double (without bath?	Single (without bath?
(total?	(total?

V. What is the average annual rate of occupancy?

Class A:

Class B:

VI. During which months is the occupancy rate highest?

a) indicate the months:

b) indicate the percentage:

VII. During which months is the occupancy rate lowest?

a) indicate the months:

b) indicate the percentage:

VIII. What prices (minimum and maximum) are generally charged?

a) In Class A hotels:

Single apartment (minimum:	Single room (minimum:
(maximum:	(maximum:

b) In Class B hotels:

Single apartment (minimum:	Single room (minimum:
(maximum:	(maximum:

- IX. Is there any variance in rates by season?
- a) Are they raised or lowered?
 - b) How much?
 - c) When? (indicate the months)
- X. Are the existing hotel facilities in Rio de Janeiro adequate in terms of number of rooms available?
- XI. If no, what are the present plans for expansion or renovation of existing or construction of new facilities?
- a) South Zone:
 - b) Downtown and Flamengo:
- XII. Which hotels have air-conditioned installations?
- a) Indicate them:
 - b) Indicate number of rooms and apartments:
 - c) Indicate the number and name of other parts of the hotel:
- XIII. Which hotels provide a swimming-pool?
- XIV. Has a study ever been made to determine the tastes and requirements of the American and international tourists?
- a) By whom?
- XV. Is there any training technique for hotel management and personnel?
- a) If so, does it include trips abroad to observe successful foreign hotel operations?
 - b) Are there regular training courses in hotel management in the country?

XVI. Have minimum standards of quality been established for hotels aiming at their classification?

- a) Is there any official classification?
- b) Established by whom?
- c) By whom is it controlled and supervised?

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HOTELS

PRIVATE QUESTIONNAIRE

NAME OF THE HOTEL:

ADDRESS:

I - What measures has this hotel taken in order to facilitate communications with the English language tourist?

- | | |
|---|-----------|
| a) Has it polyglot telephone operators? | How many? |
| b) Has it polyglot attendants? | How many? |
| c) Has it polyglot door-keepers? | How many? |
| d) Has it polyglot maids? | How many? |
| e) Has it 'maitre'? | How many? |
| f) Has it barmen? | How many? |
| g) English 'menu'? | |
| h) English regulations? | |

II - Do the training programs of the hotel include practice preliminary of English language, in order to facilitate the touch with international tourists?

III - Is there any kind of course to teach special treatment to be given the tourist, as well as other necessary aspects for a "good service"?

IV - Is there, in this hotel, an organized information service in connection with tours, amusements, etc., in the city?

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V - Has the hotel any special system to attend complaints? - What is it?

VI - What incentive have the Federal and Municipal Governments given to:

- a) build new hotels?
- b) preservation or improvement of these hotels?

VII - Are there financial facilities for hotels?

- a) If yes, what are they and in what range?
- b) If no, what measures are recommended?

VIII - Is this hotel managed by a professional innkeeper?

- a) If no, what reason?

TRANSPORTATION QUESTIONNAIRE

1. What facts can be obtained regarding the people visiting Brazil from the United States?

a) Total number for years (By class)	1955,	1956,	1957
b) By states of origin	"	"	"
c) By mode of travel (air/sea)	"	"	"
d) By purpose of visit	"	"	"
e) By months of the year	"	"	"
f) Average length of stay	"	"	"
g) Average dollar expenditure per day	"	"	"
h) Package tours	"	"	"

2. What are the current schedules of those carriers serving Brazil from the United States (for each carrier)?

a) Each city in Brazil

12/16

2. b) Number of flights or ships

 - c) Total capacity

 - d) Percentage utilization of capacity (No. of passengers actually carried vs. total capacity).
-
3. What schedule changes are planned during 1959 and 1960?
(Provide same information as in a, b, and c above)
-
4. What are the current prices for trips to Brazil (for each carrier)?
 - a) First Class - Tourist

 - b) Package Tours

 - c) From various parts of the U.S.
-
5. What role do the various carriers play in terms of advising tourists and potential tourists where to go, what to see, etc, while in Brazil?

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6. What steps have the various carriers taken to stimulate increased travel to Brazil? (Or as part of South American tour).

a) Advertising

1 - Media used

2 - Frequency

3 - Budget

b) Publicity

1 - Type

2 - Budget

c) Brochures and Literature

1 - Type (show examples)

2 - Amount

3 - Budget

d) Travel Agent Tours

1 - Number

2 - Frequency

3 - Budget

7. What are some of the major problems or obstacles to be overcome in terms of promoting increased travel from the U.S. to Brazil?

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SOUVENIR DEALERS QUESTIONNAIRE

Definition: Souvenirs are generally:

- products native to a particular country or region
- handcrafted and aesthetically appealing
- a "bargain" in terms of value and cost
- symbolic and only available in the country

1. What tourist souvenirs are offered for sale in Rio?

2. What is the range of prices of the various items?

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1.1/2

3. Where are the souvenir selling places located?

Air - ship - rail terminals

Hotels

Department Stores

Specialty Shops

Street Vendors

Others

4. What means are used to advise the tourist of the types of souvenirs available and where they can be purchased? (Show samples of literature, advertisements, etc.)

5. What types of souvenirs seem to appeal most to American tourists?

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6. What is the average expenditure of American tourists for souvenirs of various types?

Gems _____

Handbags _____

Others _____

7. In the case of gems, are there any quality guarantees assured the buyer?

8. Has any consideration been given to the creation of a "free port" shopping center similar to Shannon's and various islands in the Carribean?

9. Outside of those items usually considered souvenirs, are there any other products available in Rio, which represent real bargains to the American tourist? If yes, what are they, where are the stores located, how is the tourist informed of these items, etc.?

10. Is there any advertising or public relations conducted in the United States promoting the sale of Brazilian souvenir items?

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A STUDY OF THE
BRAZILIAN TOURISM POTENTIAL

BOOK II

REACHING THE U.S. TOURIST

Copy # 2

A.I.D. HISTORICAL AND
TECHNICAL REFERENCE
ROOM 1856 NS

August 12, 1958

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IN RESPONSE TO A REQUEST FROM THE GOVERNMENT OF BRAZIL THE GOVERNMENT OF THE UNITED STATES ENTERED INTO AN INTER-GOVERNMENTAL AGREEMENT TO PROVIDE THE SERVICES OF TWO PROFESSIONAL CONSULTANTS TO GIVE TECHNICAL ADVICE TO THE CONSELHO DE TURISMO DA CONFEDERAÇÃO NACIONAL DO COMÉRCIO IN CONNECTION WITH THE BRAZILIAN GOVERNMENT'S INTEREST IN INCREASING TOURIST TRAVEL TO BRAZIL.

THIS REPORT REPRESENTS THE PROFESSIONAL AND TECHNICAL VIEWS OF THE EXPERTS ON THE QUESTIONS CONNECTED WITH DEVELOPING AN INCREASED FLOW OF TOURISTS TO BRAZIL.

IT IS EMPHASIZED THAT THE DATA AND RECOMMENDATIONS CONTAINED IN THIS REPORT ARE STRICTLY TECHNICAL IN CHARACTER AND DO NOT REPRESENT THE OFFICIAL VIEWS OF EITHER THE CONFEDERAÇÃO NACIONAL DO COMÉRCIO (DESIGNATED BY THE GOVERNMENT OF BRAZIL) OR THE GOVERNMENT OF THE UNITED STATES. THE APPLICABILITY OF THESE TECHNICAL RECOMMENDATIONS OF COURSE DEPENDS UPON MANY FACTORS WHICH ARE OUTSIDE THE TERMS OF REFERENCE RELATING TO THIS REPORT.

B O O K I I

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FOREWORD

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F O R E W O R D

Book I presented an evaluation of Brazil's tourism potential, discussed some of its internal development needs, and defined initial and expanded tourist development programs.

As the internal development programs proceed it is increasingly important to communicate effectively to the growing U.S. travel market, so that potential tourists have knowledge of what Brazil has to offer.

Under today's highly competitive conditions for the American tourist's dollar, it is essential that every medium of communications be considered - advertising, public relations, sales development, merchandising, and communications through sales channels. In Book II we make recommendations on how the objective of promoting U.S. tourism to Brazil may be accomplished through an integrated External Communications Program.

This program is divided into four sections:

1. The Situation

A discussion of the situation facing Brazil in its bid for increased tourism. This information provides the factual basis for the Program.

2. External Communications Objectives

Objectives are based on the needs indicated in the situation. They establish specific areas of activity and pinpoint the goals to be reached in order to accomplish the prime overall objective.



3. The Three Year Plan

The Program has been broken down in three phases, covering approximately one year each, so timed that the External Communications Program can keep proper pace with the internal development.

4. Budget

The costs involved for each Phase of the Program are presented covering a period of three years.

It is strongly recommended that the following projects be given top priority during the first phase of the Program:

- a) Aggressive sales development and public relations work among Travel Agents and Carriers. This activity is the foundation for the entire program.

- b) "Show of Force" advertising to convince the travel industry that Brazil intends to become an important factor in their business.

BOOK II RESUME

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B O O K I I R E S U M E

1. U.S. foreign travel expenditures have increased more than two and a half times in the last decade, reaching a total of \$1.9 billion in 1957. Every indication is that this rate of expansion will continue in the future under the impetus of the jet age.
2. South America's share of this expanding travel market has been relatively small, averaging between two and three per cent during this period, and reaching a high of \$37 million in 1957 (2.7% of the total).
3. These U.S. foreign travel expenditures represent the major source of dollar income for many European countries, including Great Britain, France and Italy.
4. Tourist-conscious foreign countries, trying to attract increasing numbers of U.S. visitors, spent approximately \$12 million in 1957 on advertising and promotion, which represents about 25 per cent more than that spent two years before.

5. The amount spent by South American countries promoting tourism in the United States is insignificant, with the result that little information exists in the travel industry and in the public mind as to what it has to offer.
6. In Brazil during recent years a considerable foreign travel deficit has built up, resulting from residents of Brazil spending more money on foreign travel each year than is received from foreign visitors.
7. Most Americans travel to Brazil by air, and traffic to Brazil by this means can be increased greatly without over-burdening present airline capacity. New, faster steamships, with increased capacity, will be in service soon.
8. While first class air fares from the United States to Brazil and Europe are roughly comparable, the new economy fare to Europe puts Brazil at a competitive disadvantage. However, the low price of domestic flights and other cost of living items while in Brazil offsets this to a large degree.
9. There is a need for additional research to determine the image of Brazil as a vacation land in the

mind of the American public so that its strong points can be exploited and its weak points overcome by positive communication.

10. United States travel agents do not possess sufficient travel knowledge about Brazil to advise potential tourists about its vacation possibilities. The relative unavailability of all-expense package tours encompassing Brazil alone is a deficiency.
11. Aggressive sales development and public relations efforts aimed at travel agents, travel editors, the American public, in cooperation with the carriers, in promoting Brazil's touristic merits is urgently needed.
12. "Show of force" advertising is needed to convince all elements of the travel industry if Brazil is desirous of seeking a larger share of the expanding U.S. travel market.

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SECTION I

THE SITUATION

Table 1.

Expenditures for Overseas Travel by U.S. Residents

(Expenditures in millions of dollars: number of travelers in thousands)

Year	Number of travelers	Foreign expenditures	Fares paid		TOTAL
			To foreign carriers	To U.S. carriers	
1947	435	573	55	88	716
1950	676	754	145	123	1,022
1953	827	929	179	198	1,306
1954	912	1,009	183	209	1,401
1955	1,075	1,153	201	258	1,612
1956	1,239	1,275	238	301	1,814
1957	1,369	1,372	256	322	1,950

Source: "Survey of Current Business" -
U.S. Department of Commerce,
Office of Business Economics.
July 1958.

I . THE SITUATION

A. The U.S. International Travel Situation

1. Size of U.S. Overseas Travel Market

U.S. residents spent more than \$1.9 billion for foreign travel in 1957, which represents an increase over the \$1.8 billion spent in 1956. Every indication is that 1958 will be another record year, with most estimates ranging about \$2 billion.^{1/}

Foreign countries received over \$1.6 billion from U.S. travelers in 1957, including \$250 million in international fares. U.S. shipping companies and airlines received \$330 million in fares.^{1/}

This dollar income of foreign countries from the U.S. travelers of \$1.6 billion - the fares collected by their plane and ship operators and the goods and services purchased abroad - represents a larger sum than the amounts spent abroad for either coffee or petroleum, the two largest import items of the United States. Travel accounts for 7-8 per cent of the total outlays of U.S. imports for goods and services.

The trend of foreign travel in the postwar years is shown on Table 1, facing page.

Almost 1,240,000 Americans went abroad (other than Canada and Mexico) in 1956 and this figure rose to 1,370,000 in 1957. The rate of expansion of this market is best illustrated by the following facts: the 1957 total number of overseas travelers is three times the 1947 figure; the amount of foreign expenditure in 1957 is almost two and a half times that spent in 1947.^{1/}

^{1/} Source: U.S. Department of Commerce, Office of Business Economics.

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This growth in foreign travel is one facet of the gradual rise in the standard of living in the United States, a feature of which has been the use of a larger proportion of consumer incomes for recreational and related purposes.

An increasing proportion of disposable personal income is being spent by Americans on foreign travel, as shown in the following table. These figures reflect the continuing prosperity, increased leisure, vacations with pay, and other factors here and abroad.

Table 2.

Foreign Travel Expenditure and Disposable Personal Income^{1/}

(In millions of dollars)

Year	Total Expenditures for Foreign Travel	Disposable Personal Income	Column 1 Per Cent of Column 2
1948	822	187,600	0.44
1949	927	188,200	0.49
1950	1,022	206,100	0.50
1951	1,028	226,100	0.45
1952	1,188	237,400	0.50
1953	1,306	250,200	0.52
1954	1,401	254,400	0.55
1955	1,612	270,600	0.60
1956	1,814	286,700	0.63
1957	1,950	300,600	0.65

Some American tourists come from the nine million families in the U.S. with incomes between \$5,000 and \$7,000, but with the competitive pressures on discretionary income and the high cost of living in the United States today, the heart of the market is among the families with incomes of over \$7,000 per year - six million families - or about 18 million people.^{2/}

^{1/} U.S. Department of Commerce, Office of Business Economics.

^{2/} The Dynamics of Travel, Curtis Publishing Company. November 1956.

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Table 3.

Expenditures^{1/} for Foreign Travel^{2/} by United States Residents, Less Transportation,
Total and Per Cent of Total, by Country and by Region, 1947-56.

(Amounts in millions of dollars)

YEAR	TOTAL		Canada		Mexico		Europe and Mediteran.		Bermuda,W. Indies & Cent.Amer.		South America		Other	
	Amt.	%	Amt.	%	Amt.	%	Amt.	%	Amt.	%	Amt.	%	Amt.	%
1947	573	100	241	42.0	140	24.4	107	18.7	56	9.8	16	2.8	13	2.3
1948	631	100	267	42.3	147	23.3	128	20.3	52	8.2	22	3.5	15	2.4
1949	700	100	265	37.9	155	22.2	185	26.4	57	8.1	21	3.0	17	2.4
1950	754	100	261	34.6	172	22.8	225	29.9	61	8.1	22	2.9	13	1.7
1951	757	100	255	33.7	194	25.6	195	25.8	75	9.9	25	3.3	13	1.7
1952	840	100	257	30.6	209	24.9	256	30.5	78	9.3	25	2.9	15	1.8
1953	929	100	282	30.4	226	24.3	306	32.9	76	8.2	20	2.2	19	2.0
1954	1,009	100	284	28.1	233	23.1	360	35.7	87	8.6	22	2.2	23	2.3
1955	1,153	100	306	26.5	255	22.1	430	37.3	107	9.3	22	1.9	33	2.9
1956	1,275	100	316	24.8	279	21.9	473	37.1	134	9.2	29	2.3	44	3.4
1957	1,372	100	340	24.8	305	22.2	483	35.2	153	11.2	37	2.7	54	3.9

^{1/} Excludes fare payments to United States and foreign-flag carriers; excludes fare payments of emigrants, travel expenditure of the Armed Forces, Government employees and their dependents, and persons employed in foreign countries.

^{2/} Travel to Canada and Mexico as well as oversea travel.

Source: U.S. Department of Commerce, Office of Business Economics, Balance of Payments Division. July 1958.

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This foreign travel market is a highly concentrated one geographically. In 1957, 72 per cent of all passports issued was accounted for by the people from only 11 States: New York, California, Illinois, New Jersey, Pennsylvania, Massachusetts, Ohio, Michigan, Texas, Connecticut and Florida. The balance of 28 per cent of the passports issued were distributed over the other 37 States. For the first quarter of 1958, there were about two-thirds as many people leaving from the West Coast of the United States (California) as there were from New York State, to South America. Through March 1958 there were 1,607 persons going to South America from the state of New York as opposed to 1,091 persons leaving from California.^{1/}

2. Dollar Share of Overseas Markets

Table 3 (facing page) depicts the trend in expenditures for U.S. foreign travel as concerns the various regions of the world. In analyzing this table, two significant facts stand out:

- a. Europe has increased its share of the money from this expanding market, going from 18.7 per cent in 1947 to 37.1 per cent in 1956, at the expense of almost every section of the globe except Bermuda, West Indies and Central America. However, Europe had a slight decline in share in 1957, accounting for 35.2 per cent of U.S. tourist dollars. It would indicate that the impact of the Suez crisis last year is reflected in this decline.

^{1/} Travel and Resort Department, Hearst Advertising Service, First Quarter Report, New York, 1958.

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The current unrest and trouble in the Middle East will undoubtedly affect the travel habits of the American tourist again in 1958 and 1959, causing still further decline in total dollar expenditures to the European and Middle East regions.

- b. South America's participation in U.S. foreign travel expenditures has declined, dropping from a high of 3.5 per cent in 1948 to a low of 1.9 per cent in 1955. While the South American share of dollars from tourism has risen in both 1956 and 1957, it still is considerably short of the share of market dollars received in 1948.

This increase in expenditures of American tourists to South American countries (as well as the increase in number of tourists) for the years 1956 and 1957 is a healthy sign. The largest share of this increased revenue to South America will go, without doubt, to the country or countries which are most active in promoting their tourism potential to the people of the United States. Brazil, with its great variety of magnificent attractions, could through proper exploitation capture a considerable share of this increased tourist trade.

If South America had maintained its 1948 share of this market, Americans would have spent over \$45 million in South America in 1956, exclusive of fare payments to foreign carriers. This amount is roughly double that which was actually spent. Adding an estimated \$8 million for payments to foreign carriers serving South America

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Table 4.

Number of United States Travelers to Oversea Countries,
by Means of Departure from the United States, 1955-56-57^{1/}

(Thousands)

Travelers	1955	1956	1957	Travelers	1955	1956	1957
<u>Oversea,</u> <u>total.....</u>	1,075	1,239	1,369	<u>Cuba,</u> <u>total.....</u>	210	261	269
Sea.....	318	327	303	Sea.....	33	43	*
Air.....	757	912	1,066	Air.....	177	218	*
<u>West Indies</u> <u>and Cen-</u> <u>tral</u> <u>America,</u> <u>total.....</u>	522	631	704	<u>Europe and</u> <u>Mediterranean,</u> <u>total....</u>	482	521	556
Sea.....	87	87	79	Sea.....	214	226	205
Air.....	435	544	625	Air.....	268	295	351
<u>Bermuda,</u> <u>total....</u>	89	93	99	<u>South</u> <u>America,</u> <u>total....</u>	34	42	51
Sea.....	20	18	*	Sea.....	6	5	7
Air.....	69	75	*	Air.....	28	37	44
<u>British</u> <u>West</u> <u>Indies,</u> <u>total....</u>	181	223	276	<u>Other</u> <u>Oversea,</u> <u>total....</u>	37	45	58
Sea.....	25	19	*	Sea.....	11	9	12
Air.....	156	204	*	Air.....	26	36	46
				<u>Japan,</u> <u>total...</u>	28	39	44
				Sea.....	8	7	*
				Air.....	20	32	*

^{1/} Excludes number of travelers on cruises, military personnel and other Government employees stationed abroad, their dependents and U.S. citizens residing abroad.

Sources: U.S. Department of Commerce, Office of Business Economics, and U.S. Department of Justice, Immigration and Naturalization Service.

Note: Separate estimates of the number of U.S. travelers are available only for those countries and areas shown in this table (except Europe and Mediterranean).

* Not available for 1957.

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and the amount would have totalled \$53 million in 1956. In the same line of reasoning, South America would have gathered \$48 million in 1957 and, with an estimated \$9 million to foreign carriers added to this, the total amount would have come to \$57 million in 1957. However, all of South America received only \$37 million in 1957 which, incidentally, is \$6 million less than the \$43 million spent by Americans in Cuba alone in 1957.

Of the total amount spent by American tourists in South America in 1956, Brazil received the largest amount - \$8 million. Assuming they maintained their 1948 share of this expanded market, this amount would have been \$16 million in 1956, or double that which was actually received. Figures of the 1957 breakdown are not yet available.

Recent estimates of SUMOC^{1/} in Brazil indicate that in 1957 all foreigners spent about \$12 million in Brazil for travel and related goods and services. At the same time Brazilians spent about \$52 million abroad for foreign travel.

3. Numbers of Overseas Travelers

Table 4 (facing page) shows the number of U.S. travelers going overseas (except Canada and Mexico) by means of departure for the years 1955, 1956 and 1957.

These data reveal that in 1957, excluding Canada and Mexico, the West Indies and Central America received the largest number of American

^{1/} Superintendencia do Moeda do Credito.

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Table 5.

U.S. Citizens Arriving in and Departing from the United States,
by Counti, of Embarkation and Debarkation,
by Means of Transportation, Calendar Year 1956^{1/}

Country	Arrivals			Departures		
	Sea	Air	TOTAL	Sea	Air	TOTAL
South America.....	6,546	41,842	48,388	8,903	45,957	54,860
Argentina.....	1,471	1,673	3,144	1,307	1,823	3,130
Brazil.....	1,371	6,859	8,230	1,925	6,584	8,509
Colombia.....	337	5,554	5,891	637	6,685	7,322
Venezuela.....	2,071	19,602	21,673	3,274	21,885	25,159
Other So. Am.	1,296	8,154	9,450	1,760	8,980	10,740

Table 6.

Aliens Arriving in and Departing from the United States,
by Country of Embarkation and Debarkation,
by Means of Transportation, Calendar Year 1956^{1/}

Country	Arrivals			Departures		
	Sea	Air	TOTAL	Sea	Air	TOTAL
South America.....	7,458	63,183	70,641	11,848	50,899	62,747
Argentina.....	2,231	4,822	7,053	2,534	3,449	5,983
Brazil.....	1,876	13,207	15,083	2,635	10,325	12,960
Colombia.....	305	10,353	10,658	874	9,184	10,058
Venezuela.....	2,027	20,251	22,278	4,377	17,317	21,694
Other So. Am.	1,019	14,550	15,569	1,428	10,624	12,052

^{1/} Excludes travel over land borders to and from Mexico and Canada.

Source: U.S. Department of Justice, Immigration and Naturalization Service.

Note: These figures cover all aliens; hence they include both immigrants and non-immigrants. It should be kept in mind that alien residents going abroad for temporary visits appear in these totals.

tourists (51%), followed by Europe and the Mediterranean (41%), with all of South America receiving only 51,000 visitors (3.7%).

No statistics are currently available concerning the actual number of U.S. residents arriving in Brazil. Neither are there any at hand regarding Brazilians traveling overseas.

Some clue as to the relationship between the number of U.S. residents leaving for various countries in South America as opposed to residents of these countries arriving in the U.S. is afforded by tables 5 and 6. (Facing page.)

This is the only breakdown made by the Department of Commerce for individual countries within South America and the figures are not strictly comparable with the other data shown previously. Despite the qualifications described in the footnotes to the table, it is interesting to note that almost twice as many Brazilians arrived in the United States during 1956 (15,083) as there were U.S. citizens arriving in Brazil (8,230). (See facing tables.)

The figures on Table 5 (facing) apply only to American citizens. However, the totals cannot be considered indicative of the number of U.S. citizens visiting a particular country. The country of debarkation (or embarkation) may or may not be among the countries being visited. Travel in additional countries is not indicated in these tables at all.

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The situation facing South America can best be summarized by quoting from a world travel expert:

"The mystery of the tourist world continues to be South America. With magnificent scenery, rich cultures, foreign atmosphere, historic sights and friendly people, the countries of the southern continent, in effect, do nothing to exploit their tourist resources. The result is that their share of U.S. tourist expenditures overseas is only 2.7 per cent represented by 51,000 visitors who spent \$37 million in 1957."

4. Economic Significance of Tourism

Table 7 indicates the average travel expenditures of U.S. residents in Europe and the Mediterranean for the years 1952, 1954, 1956 and 1957. There is a definite upward trend in terms of the average amount spent until 1957, where a small decline was experienced. It establishes a peak expenditure during the second quarter of the year. In 1956, the highest spenders averaged \$965 while in Europe. This combined with the average of \$1,690 for transatlantic fares, brings the total to \$1,655 for the entire trip. Although there was a decline in the average amount spent by tourists in Europe in 1957, the increase in number of travelers brings the total expenditures to about two per cent higher than that of 1956.

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Table 7.

Average Travel Expenditures of United States Residents in Europe and the Mediterranean Area, 1952, 1954, 1956 and 1957 by Quarter.^{1/}

	1952	1954	1956	1957
United States Residents:				
First Quarter.....	657	722	744	711
Second Quarter.....	853	931	965	918
Third Quarter.....	743	849	916	878
Fourth Quarter.....	*	*	888	855
Total.....	<u>767</u>	<u>858</u>	<u>905</u>	<u>867</u>
Sea.....	800	947	1,005	998
Air.....	722	761	829	790
Native-Born Residents:				
Total.....	<u>935</u>	<u>1,007</u>	<u>1,062</u>	<u>1,000</u>
Sea.....	1,024	1,146	1,226	1,202
Air.....	831	869	954	898
Foreign-Born Residents:				
Total.....	<u>548</u>	<u>637</u>	<u>643</u>	<u>633</u>
Sea.....	553	684	707	722
Air.....	539	577	581	566

*Not available.

The economic importance of the American tourist in Europe is dramatized by the fact that more dollars are earned for the national economies of some countries from U.S. tourism than from any other export. This is true of Great Britain, France, and Italy for example. In Switzerland, only the watch industry earns more dollars,^{2/} and in Canada only newsprint brings in more dollars.^{3/}

^{1/} Source: U.S. Department of Commerce, Office of Business Economics.

^{2/} Commercial Attache, Swiss Consulate, New York, New York.

^{3/} International Travel Report to the President of U.S. by C. B. Randall, April 17, 1958.

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Travel prognosticators have conservatively estimated that expenditures this year would exceed last year's total by five per cent. But late reports from state agencies, air lines, automobile clubs, and other sources^{1/} surveyed indicate the increase will exceed ten per cent.

5. Factors Influencing Tourist Decisions

The various forces that shape and influence the American tourist's choice of a place to visit are the following:

a. Tourist advertising and public relations spending is big.

A major influencing factor on the total travel market, both domestic and foreign, is the weight of advertising and public relations expenditures. Americans are persuaded to travel by some \$100 million spent every year, according to estimates made by the National Association of Travel Organizations. A large share of this amount goes for direct consumer advertising in newspapers (about \$58 million), while the rest goes for outdoor advertising, publicity, radio and TV, direct mail, promotion, pictures and brochures. Most of these expenditures are paid for by the large carriers and major resort and travel areas.

There has been an estimated 21 per cent increase in travel advertising during the last two years, in the various media in the United States.^{1/} This is certainly one of the most important

^{1/} Source: Printers' Ink, Special Report, July 18, 1958.

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factors in the rapidly increasing rate of travel and resulting expenditures on the part of American tourists.

It is estimated about twelve million dollars were spent by foreign countries during the year 1957 in order to capitalize on this expanding U.S. tourist market. The foreign governments involved have spent \$7,214,520 for the calendar year closing 1957.^{1/} In addition to this government spending, there are many private concerns interested in foreign tourist promotion who spent another \$5,000,000 by the end of 1957.

In respect to individual countries:

- The Canadian Government Travel Bureau spent close to \$2,000,000 against the U.S. market. The payoff is that Canada's tourist revenue set a new record of \$362 million in 1957, with American accounting for \$328 million of that sum.
- Nassau allocated \$1,300,000 to attract more American tourists.
- Bermuda spent \$1,100,000 against the U.S. market.
- Hawaii spent over half a million dollars wooing visitors from the mainland.

Some typical official governmental expenditures by European governments are as follows:

^{1/} Source: Report of the Attorney General of the Congress of the United States on the Administration of the Foreign Agents Registration Act: Washington, D.C. May 1958.

- The British Travel Association spent \$801,223 on travel promotion alone in 1957 in the United States. (This, combined with \$1,292,958 spent by the British information services and the British Broadcasting Corporation, comes to a total of \$2,094,181 spent by Great Britain in the United States.) Britain's tourist revenue in 1957 was \$82,000,000.
- The French Government tourist office spent \$661,082 and the French National Railroad spent \$353,144. (The majority of this latter sum was spent in promoting the use of French railroads by American tourists when they visit France.) France's share of the 1957 American tourist dollar was \$83,000,000.
- The Italian State Tourist Office spent \$388,618 and Italy received \$93,000,000 in U.S. tourist revenue.
- The German Tourist Information Office spent \$262,171 in promoting Germany as a tourist attraction and American tourists spent \$58,000,000.
- During 1957, approximately 5,000 Americans visited the Union of South Africa, which represented an increase of 25 per cent over the number of Americans who visited in 1956. While the total tourist income to the Union of South Africa was \$77 million, there are no figures to

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show how much of this was from American spending. A large factor in increasing tourism to Africa, as a whole, however, can be attributed to the large amounts that hotel interests are spending on improving their "tourist plant." It is estimated that over \$5 million will be spent in 1958 on new accommodations.

Typical media expenditures by various foreign governments on magazines and supplements are shown by the following listing.

(Dollars)

Government Organization	1957 Expenditures in U.S. Magazines & Supplements ^{1/}
Canadian Government Travel Bureau	\$687,095
Nassau Development Board	280,831
British Travel Association	245,357
Bermuda Trade Development Association	229,566
French Government Tourist Office	150,755
Italian State Tourist Office	88,403

In a report on Tourist Trends in the Caribbean, the University of Miami states "There seems to be, with the exception of Cuba, a relation between tourist promotion spending and share of the total Caribbean tourist activity. The more spent, the larger the share of the market."

^{1/} Curtis Publishing Company from data supplied by P.I.B.

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Table 8.

Promotion Expenditures by Government Tourist Boards in Selected Areas

(1956)

	Amount of Promotion Expenditures (Dollars)	Number of Visitors	Promotion Expenditure Per Visitor (Dollars)	Estimate of Actual Expenditure Per Visitor (Dollars)	Revenue Per Dollar Promotion (Dollars)	Estimated Revenue from Expenditures of Tourists (Dollars)
Curacao (N.W.I.)	\$149,041	117,998	\$1.26	\$49.09	\$39.00	\$5,793,000
Jamaica	504,000	161,386	3.12	147.80	49.00	23,853,000
Trinidad & Tobago	127,976	89,435	1.43	107.34	75.00	9,600,000
Virgin Islands	51,345	99,563	.52	116.97	227.00	11,646,000
Dominican Republic	500,000	48,040	10.40	151.12	15.00	7,260,000

Source: Adapted from reports of cooperating agencies.

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Some idea as to the amount spent by the various countries in the Caribbean is afforded by Table 8 (facing page).

The relationship between the amount spent in advertising and promotion per visitor and the dollars received from tourist expenditures is illustrated by the following examples. In 1956:

- . Dominican Republic spent \$10.40 and received \$151.12 per visitor.
- . Jamaica spent \$3.12 and received \$147.80 per visitor.

A complete listing of official government expenditures, as were reported to the U.S. Government, is found on Table 8a (following).

b. The travel agent is important in overseas travel.

The impact of the numerous impressions made by advertising and public relations, along with the advice of friends who have already traveled, has probably helped the potential tourist make up his mind about where he would like to go. Nevertheless, if he decides to go overseas, he often relies on the travel agent for help in determining particular places to visit and transportation and accommodations arrangements.

Informed people in the travel field estimate that 30-40 per cent of all overseas bookings are handled through travel agents. In the case of South America, it is estimated to be even higher. Americans look to the travel agent for professionally developed information, assistance and advice. He is in a position to recommend any place he thinks appropriate to the tourist's needs, desires and pocketbook.

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Table 8a.

Official Foreign Governmental Tourist Promotion Expenditures in the U.S.

(1957)

Government Information and Tourist Offices	Expenditures	Government Information and Tourist Offices	Expenditures
American-Swedish News Exchange, Inc.	\$ 65,480.36	German Tourist Information Office	\$ 262,170.89
Arab Information Center	106,265.78	Haiti Government Tourist Bureau	Unreported
Australian Broadcasting Commission	28,755.00	Information Service of India	191,523.49
Australian National Travel Association	67,942.26	Information Service of South Africa	26,076.79
Australian News and Information Bureau	45,502.87	Iranian Information Center	30,000.00
Austrian State Tourist Department	41,254.13	Irish Tourist Bureau	144,700.42
Belgian Government Information Center	44,179.89	Israel Government Tourist Office	110,920.07
Bermuda Trade Development Board	95,331.61	Israel Office of Information	150,737.61
British Broadcasting Corporation	268,890.02	Italian State Tourist Office	388,618.34
British Information Services	1,024,068.29	Japan Broadcasting Corporation	31,650.56
British Travel Association	801,223.00	Japan Tourist Association	112,274.89
Casa de Portugal	140,026.01	Mexican Government Railway System	64,685.97
Chinese News Service	160,764.18	Netherlands Information Service	166,891.87
Cuban Tourist Commission	8,088.00	Netherlands National Tourist Office	43,696.45
Danish Information Office	55,975.67	Netherlands West Indies Tourist Committee	50,091.43
Danish National Travel Office	38,800.00	New Zealand Government Travel Commissioner in the U.S. and Canada	110,863.56
Dominican Republic Information Center	44,932.83	Norwegian National Travel Office	27,048.02
Finnish National Travel Office	35,245.87		
French Broadcasting System in North America	136,717.24		
French Government Tourist Office	661,082.23		
French National Railroad	353,144.40		
German Federal Railroad	68,795.36		

(Continued)

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Table 8a.

Official Foreign Governmental Tourist Promotion Expenditures in the U.S.
(Continued)

(1957)

Government Information and Tourist Offices	Expenditures
Official Belgian Tourist Bureau	\$ 58,900.00
Province of Quebec Tourist Bureau	20,060.07
Republic of Indonesia Information Office	21,626.43
Royal Norwegian Information Services	17,739.36
Scandinavian Railways	36,944.29
South African Tourist Corporation	131,131.42
Spanish National Tourist Office	49,750.00
Swedish National Tourist Office	56,416.06
Swiss National Tourist Office	305,837.48
Turkish Information Office	223,195.65
Yugoslav Information Center	58,583.31
Yugoslav State Tourist Office	29,920.76
TOTAL	\$7,214,520.19

Source: Report of the Attorney General to the Congress of the United States on the Administration of the Foreign Agents Registration Act of 1938, as Amended for the Calendar Year 1957. May 1958.

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B. The U.S. International Traveler

This section deals with characteristics of the American overseas traveler, as well as his habits of travel.

1. Characteristics of U.S. Overseas Travelers

A portrait was made of the U.S. tourist in Europe by the International Travel Research Institute and the European Travel Commission. This study revealed that the typical U.S. visitor in Europe is:

- . Probably 45 years or older.
- . Most likely to be a college graduate: 58% had attended college.
- . Either in the \$10,000 or better income bracket (38%) or certainly in the \$5,000 or over level (67%).
- . Possessor of lively literary, musical, artistic and other cultural tastes.
- . Prepared to spend an average of \$870 (exclusive of transatlantic fare) on the Continent during a visit averaging from 50 days in the summer to \$1,037 on average for a winter's holiday of 61 days.
- . Most fond of the cities of Paris, London, Rome, Amsterdam, Frankfurt, Copenhagen, Munich, Brussels, Edinburgh and Madrid in that order for the 10 most popular cities in Europe.
- . Disposed to purchase clothing, luggage or cameras in preparation for a trip, and during the trip to buy

clothing, jewelry, textiles, pottery and perfume to bring home.

- . Most likely to be a member of a profession or a business executive or a teacher or a housewife.
- . Most probably traveling for pleasure (only 25% on business).
- . Intent on sightseeing, meeting the people of other countries, visiting historical and cultural attractions and attending festivals of the arts, such as music, theatre, painting, exhibitions, etc.

2. The U.S. Traveler to Latin America

While the United States traveler to Latin America is very much like the U.S. traveler to Europe, there are also certain differences. The following is an extract from a "profile" of known characteristics of winter visitors to a Latin country (not Brazil) during the winter season of 1957-58.

This "typical" winter tourist to a Latin country fits the following pattern.

- . He is comparatively wealthy. His income is considerably above average, usually above \$7,000 a year. (There is a 1 in 2 possibility that this income may be even over \$10,000.00 a year.)
- . He is apt to hold a responsible executive position or be a professional man.

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- . He lives, most likely, in a large metropolitan area on the Eastern seaboard of the United States.
- . He has, for the past two years at least, taken approximately one vacation trip a year, but there are indications that he may be taking more trips per year in the future. (The travel rate for his class shows an increase in the number of trips per year in 1957 as compared to the number taken in 1956.)
- . His vacation trip is most likely to be in the winter and is usually from two to three weeks duration.
- . He is approximately 40 years of age and is most likely to have his wife with him (but not any children under 18, if he has them.)
- . He has friends who have tastes similar to his own and upon whose judgment he relies. If he has friends who have visited any particular country, he is more likely to visit there.
- . There are indications that he will arrive in a foreign country with a fairly well established idea of what he wants to do.
- . He will probably stay at a first class hotel and will have a strong tendency to compare the service with the service in luxury hotels in the United States.
- . He can afford to buy souvenirs and services but will strongly resent any implication that he "has been taken advantage of." When he uses local transportation,

such as taxicabs or limousines, he will expect a firm price (similar to U.S. systems). This area of local transportation is the one that can cause more ill will than many other areas of service. If he must "bargain" and pay what he thinks is an unreasonable charge, his favorable impression of the whole country can change. He will, however, in most cases tip higher (regardless of the circumstances) for these services than tourists from any other country.

C. The Brazilian Travel Situation

1. Foreign Travel Expenditure

Some evidence of the current foreign travel situation in Brazil is shown in the following table:

Table 9.

Foreign Travel Expenditures: Brazil^{1/}

(Millions of Dollars)

Year	Amount Spent by Foreigners in Brazil	Amount Spent by Residents of Brazil on Foreign Travel	Foreign Travel Deficit
1955	7	19	12
1956	9	43	35
1957	12	52	40

^{1/} Source: Superintendencia do Moedae do Credito.

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This represents an accumulated total deficit of \$87 million for the three year period.

Other Latin countries, through proper exploitation and promotion, have managed to earn a profit on foreign travel, as is the case in Guatemala (Table 10).

Table 10.^{1/}

(Millions of Dollars)

Foreign Travel Expenditures: Guatemala			
YEAR	Amount Spent by Foreigners in Guatemala	Amount Spent by Guatemalans Abroad	Foreign Travel Profit
1955.....	4.5	2.3	2.1
1956.....	4.5	2.5	2.1
1957 ^{2/}	6.2	3.2	3.0

No matter what the attractions of any country are, they do not act as a lure for the potential tourist unless he has advance knowledge about them.

There seems general accord both in the Brazilian and U.S. travel industries that Americans do not know enough about Brazil. This applies to the potential overseas traveler directly and also to those "authorities" who help to shape his decisions, mainly travel editors and travel agents.

^{1/} Source: Banco de Guatemala.

^{2/} Estimated.

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There is no organized, continuing program of communication in the U.S. for purposes of promoting vacation trips to Brazil. (Current Brazilian income tax laws do not consider advertising in the U.S. by private companies as a legitimate business expense. The profit tax imposed thereon acts as a deterrent to external communications.)

Advance knowledge about places to visit, derived from a planned program of advertising and public relations, is important for several reasons:

- . Nearly two-thirds of all vacations are planned from three to twelve months in advance, according to a study made by the Curtis Publishing Company.^{1/}
- . Most Americans have a limited amount of time and money to spend on a vacation. They will tend to stay away from places no matter how different they purport to be, if there is not specific information to offset the impression that they are "taking a chance."
- . Travel writers must be supplied with inspiration, and supporting facts, leading to the development of favorable stories in the press.
- . Travel agents are better equipped to recommend a vacation spot or deal intelligently with the potential traveler whose interests have been preconditioned through exposure to positive communications techniques.

The importance of the travel agent in the planning of trips abroad by American tourists cannot be underestimated. As was pointed out

^{1/} The Dynamics of Travel, Curtis Publishing Co., Nov. 1956.

in Section I, 30 to 40 per cent of all trips to Europe are planned through a travel agent, and the percentage is still higher among trips to South America.

2. Tour Packages)

The chief selling aid of the travel agent is the all-inclusive tour package. Ideally, a "package" relieves the tourist of all the tedious details that go into the planning of a trip. It also gives him greater assurance that his trip will be a successful one in every respect. It means that by paying a specified sum in advance (and many agencies are now offering these services on a credit basis) the tourist can be assured of the following:

- Reserved, confirmed passage, by either sea or air, to and from his destination;
- Reserved and confirmed accommodations in the hotels of his choice, upon arrival in the country;
- The expert arrangements by travel specialists of his time and activities in a foreign country which will ensure his getting the most from the country that it can offer him within the allotted time that he has to spend; and
- He knows precisely what his whole vacation will cost.

This last point is most important. If a tourist does not have to pay-as-he-goes for his meals, hotels, passage, airport transfers, sight-seeing, etc., he is inclined to spend more than he normally would

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for his amusements, relaxations or the purchase of souvenirs while he is visiting the country.

The popularity of package tours and vacations has increased tremendously, and without exception all people who are engaged in this type of selling, insist that they have specific planned packages that they can sell to a customer. They must to be in a position to say to their prospective customers, "Here is a specific place that you can go to, and here are specific things that are included in this particular tour, and it will cost you this amount of money." As a general rule they shy away from promoting a trip to a location on a general basis.

Travel agents indicate that they would not be enthusiastic about simply telling their prospective customers "Go to Brazil."

They would much rather be able to sell to their prospective customers a specific package for one week, two weeks, or three weeks, which may include transportation to a specific hotel in a specific city with specific side trips to various places of interest, all included in one price.

A comparative example of Tour Packages follows. The first is a 23-day all-expense European tour package currently being offered in the United States. The second is a model tour recommended by the Touring Club of Brazil for a 22-day stay in Brazil. This second tour, incidentally, is purely a proposed one. No such tour package of Brazil is being offered in the U.S. at the present time.

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The European tour is being offered at the price of \$867.00 and includes:

1. Transatlantic air transportation both ways
2. By air in Europe as in itinerary
By first class steamer from Barcelona to Palma de Mallorca
3. All hotels with at least hot and cold running water
4. Two meals daily
5. All transfers
6. All entrance fees for sightseeing listed, as well as guide fees, etc.
7. All gratuities and taxes

The second tour, that of Brazil, was taken to two major travel agents in New York for an estimate of cost to an American tourist. They felt they could not offer this tour and include the comparable services of the European tour for under \$1500.00, (and one made the reservation that it might go as high as \$1800.00). This is an example of the lack of information, even among the travel "experts," of the tourism advantages of Brazil.

The two tours follow:

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Tour 1

A typical 23 day tour of Europe:

Independent Air-Land Cruise Leaving Daily

NEW YORK

1st Day Leave New York International Airport for your overnight hop to Lisbon.

LISBON

2nd Day Arrive Lisbon in the morning and transfer to hotel.
Afternoon city sightseeing tour including Restauradores Square, Edward VII Park, the Greenhouse, the Bull Ring, New Quarters, the Museum of Coaches, Jeronimos Monastery, Port Wind Institute, etc.

3rd Day Morning sightseeing of city includes Rossio, St. George's Castle, Ancient Art Museum, Popular Art Museum, St. Toque's Church, etc.

4th Day Morning at leisure
Afternoon excursion to the Royal Palaces of Queluz and Sintra, the Pena Castle, Tea at Estoril.

MADRID

5th Day Leave by plane for Madrid, transfer to hotel. At leisure.

6th Day Morning sightseeing tour including Town Hall, Mayor Aquare, Puerta del Sol Chamber of Deputies, Canova Square and Prado Museum.
Afternoon sightseeing tour visiting Royal Palace, Church of San Francisco the Great, San Antonio de la Florida, etc.

7th Day Day at Leisure
Excursions to Toledo, the most ancient town in Europe (Optional).

8th Day At leisure

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BARCELONA

9th Day Leave by morning plane to Barcelona. After checking baggage, sightseeing tour including a visit to Paseo de Gracia, Parque de la Ciudadella, Pedralbes, Sagrada Familia, Plaza de Toros.

Leave Barcelona by night boat for Palma de Mallorca.

PALMA DE MALLORCA

10th Day Arrive Palma de Mallorca in the early morning and transfer to your hotel. Morning sightseeing tour on foot visiting the Cathedral, Town Hall, San Francisco Cloister, the Longa Museum, etc.

Afternoon city sightseeing tour by motorcoach including Son Vida, Genova Grottoes, Bellver Castle, Mulet typical house.

11th Day Two Days at leisure
and Excursions to Valldemosa, Deya and Soller or Manacor
12th Day and Drach and Hams Grottoes or to Formentor. (Optional)

NICE

13th Day Leave by air to Nice via Barcelona. Transfer to hotel. Afternoon excursion to Grasse and Georges du Loup.

14th Day Morning at leisure. Afternoon excursion to Menton and Monte Carlo going via the Grande Corniche and coming back along the sea front.

15th Day At leisure

ROME

16th Day Day at leisure
By evening plane to Rome and transfer to your hotel.

17th Day Morning city sightseeing tour including Quirinal Palace, Trevi Fountain, Pantheon, Vatican Museum and Galleries. Afternoon tour visiting the Sistine Chapel, Basilica of St. Mary Major, St. John Lateran, etc.

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ROME (cont)

- 18th Day Morning at leisure
In the afternoon, an excursion to Tivoli
- 19th Day Day at leisure
Or optional sightseeing tour of Church of the Capuchin Monks, Borghese Picture Gallery, Janiculum Hill, St. Peter's Basilica, Colosseum, St. Paul's outside the walls, Palatine Hill, Capitol Hill Imperial and Roman Forum.
- 20th Day At leisure in Rome
and Optional excursion to NAPLES-SORRENTO-CAPRI with
21st Day to Pompeii.

ZURICH

- 22nd Day Leave Rome by early morning plane to Zurich.
Arrive Zurich and transfer to your hotel.
Remainder of day free for shopping.
- 23rd Day Morning OR afternoon sightseeing tour of Zurich,
one of Switzerland's loveliest cities.
- In the evening board your plane for your overnight hop back to New York.

OR TAKE ADVANTAGE OF THE STOPOVER PLAN AND
VISIT ALL OR ANY ONE OF THESE CITIES WITHOUT
ADDITIONAL AIRFARE:

PARIS, BRUSSELS, AMSTERDAM, LONDON,
DUBLIN, FRANKFURT, COLOGNE

RETURN AT YOUR CONVENIENCE ANYTIME FROM ANYWHERE.

- 24th Day Arrive New York International Airport in the morning.

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TOUR 2

A typical 22 day tour of Brazil, as proposed by the Touring Club of Brazil in its "Turismo Dollar Plan":

Sample-Itinerary for a North American Tourist -
22 Days in Brazil.

AMAZONIA

- 1st Day Arrive at night in the National Park of Amazonia; overnight stay.
- 2nd Day Visit the National Park of Amazonia; overnight stay.

SALVADOR

- 3rd Day Leaving by plane in the morning to Salvador, and calling for sea-bath and lunch (regional food) in the National Park of the Northeast of Brazil (littoral); dinner and sleep in Salvador.
- 4th Day Visiting Salvador - overnight stay.

RIO DE JANEIRO

- 5th Day Sightseeing in the morning and departure in the afternoon for Rio de Janeiro; overnight in Rio.
- 6th Day Excursions to Rio beaches and Sugar Loaf; visit to churches and the National Museum.
- 7th Day Petropolis excursion.
- 8th Day Excursion to Corcovado (returning by Caminho das Canoas.)
- 9th Day Excursion on Guanabara Bay, beaches and Fluminense Lakes.
- 10th Day Rio-Teresopolis-Petropolis-Rio Circuit excursion.
- 11th Day Free

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BELO HORIZONTE

- 12th Day Leaving by plane in the morning for Belo Horizonte. Lunch (regional food). Sightseeing. Departure at 15:00 hours to Ouro Preto, by motorcar. Hotel. Dinner with short lecture about the Memorial City. At 21:00 hours visiting the town with the effects of light and shadow, guards and guides wearing 18th century clothes in the churches.
- 13th Day Leaving at 9 A.M. for Belo Horizonte. Lunch. Return to Rio by plane. Afternoon free. At night in Rio: nightclubs, and regional shows.
- 14th Day Visit to the Municipal Stadium and go for a ride around Tijuca.

SAO PAULO

- 15th Day Leaving by car to Sao Paulo, via Angra dos Reis. Lunch at Angra (regional food). Visit to Volta Redonda, Military Academy of Agulhas Negras (Black Needles). Night stay in the hotel of the National Park of Itatiaia.
- 16th Day Visit to the National Park of Itatiaia. Departure after lunch for Sao Paulo. Overnight in Sao Paulo.
- 17th Day Visits in the Sao Paulo City. Butantan Institute, Ipiranga Museum, Ibirapuera Park, etc. Night stay in Sao Paulo.
- 18th Day Visit to Campinas, Agronomic Institute and typical coffee farm - lunch in the locale. Dinner and night stay in Sao Paulo.
- 19th Day Visit to Santos. Sao Vicente. Guarujá. Dinner and night stay in Sao Paulo

IGUAÇU

- 20th Day Departure by plane to the National Park of Iguazu, flying over the coffee planting region and forest of North Parana. Night stay at the Hotel of the Park.
- 21st Day Visit to the National Park of Iguazu. Night stay.
- 22nd Day Departure by plane for Montevideo, Buenos Aires or Lima.

This Brazilian itinerary was devised on the provision that the tourist should travel by plane. For those who travel by steamer different arrangements must be made, from the points of entry at Rio de Janeiro or Santos.

As was stated before, no such tour package for Brazil is being offered in the United States at the moment. It is also evident that the high price of the estimates for the proposed "package" of Brazil puts it at a competitive disadvantage.

The closest thing to such a package that exists now is a 22 day all-South American tour, offered by two airlines serving the area, which includes stopovers in seven cities in South America. It includes Rio and Sao Paulo for a period of 6½ days. The total cost of this tour is \$845.00, but it does not provide for the number of services outlined in the European tour.

3. Transportation to Brazil

The flow of tourism could increase considerably without taxing the present facilities and capacity of the carriers serving Brazil from the United States. At present five scheduled airlines link the United States to Brazil on a regular departure basis. Steamship companies increased their capacity in 1958 with new, faster ships. (As steamship transportation currently accounts for such a small amount of the traffic, only the airlines will be considered here.)

Brazilian

1. Real/Aerovias
2. Varig

American

3. Pan American
4. Braniff International

Argentinian

5. Aerolíneas Argentinas

The total capacity of these airlines in terms of flights and number of seats is as follows:

Table 11.

	In One Month	
	Flights ^{1/}	Number of Seats ^{1/}
From U.S. to all of Brazil	78	4,680

Flights Servicing:		
Belem	45	450
Rio de Janeiro	78	2,025
Sao Paulo	69	1,845
Porte Alegre	36	360

Taking the monthly seating capacities for the cities of Rio de Janeiro and Sao Paulo cited above and projecting them on an annual basis, we find a total capacity of 46,440 seats per year. However, these five airlines reported carrying only 15,258 passengers from the United States to these two cities in 1957, or an average of only 33 per cent utilization of total capacity. Of course, it must be realized that there were times during the year when these carriers flew to near peak capacity but it also means that there were times when these same carriers flew practically empty.

^{1/} Based on figures from cooperating airlines.

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Table 12.

Air Passengers^{1/} to Rio de Janeiro and
Sao Paulo by U.S. City of Origin^{2/}

Destination	Total Passengers for 1957	Originating City				
		New York	Miami	San Francisco	Chicago	Los Angeles
Both Cities	15,258	10,749	4,411	36	133	29
Rio de Janeiro	8,793	6,346	2,320	36	67	24
Sao Paulo	6,465	4,403	1,991	-	66	5

4. Fare Comparisons: Brazil vs. Europe

The following tables (Tables 13 and 14) reveal that while first class fares are roughly comparable, most of the major cities in Europe can be reached, via Economy Flights, at cheaper rates than the big cities of Brazil.

Once the travel rate to South America shows a healthy increase, the airlines servicing it will be in a position to solicit the permission of I.A.T.A. for establishment of Economy Class fares. The introduction of such reduced fares would be of immeasurable value in boosting the tourist traffic to Brazil.

1/ Includes all passengers, not only U.S. citizens.

2/ Source: Figures furnished by cooperating airlines.

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Table 13.

Fares from Three Major Economic Areas in U.S. to Points in Europe

	F R O M								
	New York			Chicago			West Coast ^{1/}		
	First Class	Tourist	Economy	First Class	Tourist	Economy	First Class	Tourist	Economy
<u>TO EUROPE</u>									
London	783 (435)	567 (315)	453 (252)	864 (477)	637 (350)	524 (287)	1089 (595)	775 (419)	661 (356)
Paris	819 (455)	603 (335)	489 (272)	900 (497)	673 (370)	560 (307)	1125 (615)	811 (439)	697 (376)
Rome	951 (528)	704 (391)	591 (328)	1033 (570)	775 (427)	662 (364)	1258 (689)	912 (495)	799 (432)
Berlin	884 (491)	662 (367)	548 (304)	966 (533)	732 (403)	619 (340)	1191 (652)	870 (471)	756 (408)
Brussels	819 (455)	603 (335)	489 (272)	900 (497)	673 (370)	560 (307)	1125 (615)	811 (439)	697 (376)
Copenhagen	851 (473)	635 (353)	522 (290)	933 (515)	706 (388)	592 (325)	1125 (615)	811 (439)	697 (376)
Stockholm	901 (500)	685 (380)	571 (317)	983 (542)	755 (416)	642 (353)	1175 (643)	860 (466)	747 (403)
Frankfurt	851 (473)	635 (353)	522 (290)	932 (515)	706 (388)	592 (325)	1158 (633)	843 (457)	730 (394)

^{1/} Fares quoted are from either Los Angeles or San Francisco, depending on which was the most direct route quoted.

Note: Figures in parentheses are one way. All rates quoted are in U.S. dollars.

Table 14.

Fares from Three Major Economic Areas in U.S. to Points in Brazil

F R O M						
	New York		Chicago		West Coast ^{1/}	
	First Class	Tourist	First Class	Tourist	First Class	Tourist
<u>TO BRAZIL</u>						
Belem	540 (300)	449 (236)	615 (340)	519 (266)	804 (445)	679 ^{2/} (347)
Natal	657 (365)	566 (301)	729 (403)	611 (319)	906 (502)	784 ^{2/} (407)
Recife	669 (371)	583 (307)	745 (412)	644 (338)	934 (517)	809 ^{2/} (419)
Salvador	709 (394)	598 (315)	785 (434)	659 (346)	965 (535)	843 ^{2/} (440)
Vitoria	855 (486)	753 (400)	899 (499)	749 (416)	1050 (582)	853 ^{2/} (472)
Rio de Janeiro	829 (461)	728 (486)	898 (499)	749 (416)	1021 ^{3/} (567)	837 ^{3/} (463)
Sao Paulo	829 (461)	728 (386)	898 (499)	749 (416)	1021 ^{3/} (567)	837 ^{3/} (463)
Porto Alegre	936 (520)	798 (419)	1013 (557)	858 (460)	1122 ^{3/} (617)	944 ^{3/} (519)

^{1/} Fares quoted are from either Los Angeles or San Francisco, depending on which was the most direct route quoted.

^{2/} San Francisco.

^{3/} From Los Angeles.

Note: Figures in parentheses are one way. All rates quoted are in U.S. dollars.

Table 15 reveals that fares within Brazil (because of the high exchange rate of the Brazilian cruzeiros to dollars) are cheaper than comparable fares between major cities in Europe.

Table 15.

Fares Between Cities Within Europe and Comparable Cities Within Brazil

BRAZIL	First Class	Tourist	EUROPE	First Class	Tourist
Rio de Janeiro- Belem	235 (131)	162 (90)	Stockholm- Rome	302 (168)	229 (127)
Rio de Janeiro- Salvador	56 (31)	52 ^{1/} (29)	Paris- Rome	143 (79)	104 (58)
Rio de Janeiro- Sao Paulo	35 (20)	14 (8)	London- Paris	56 (31)	46 (25)
Sao Paulo- Porto Alegre	72 (40)	45 (25)	Copenhagen- Berlin	93 (52)	64 (36)
Belem- Natal	65 (36)	* *	Rome- Brussels	144 (80)	104 (58)

^{1/} Class "B" fare.

* No tourist class fare quoted.

Note: Prices quoted for Brazilian rates are based on a conversion of Brazilian cruzeiros to U.S. dollars. Rate as of July 1, 1958: \$Cr. 130.00 - \$U.S. 1.00.

Figures in parentheses are one way. All rates quoted are in U.S. dollars.

D. Brazil's Image in the U.S.

The following image of Brazil was derived from answers given by respondents in regard to their attitude toward a Caribbean Latin country, where Brazil had been included to be asked about for comparative purposes only. It cannot be determined whether these responses are from people who would logically be potential tourists to Brazil or not. At least half of them have, however, visited at least one Latin country (either Caribbean, Central or South American).

It is of utmost importance in considering this image of Brazil to realize that this image is not a definitive one, nor is it one that can be considered in any light other than that of a clue, or possible inkling of what might be revealed in a proper investigation of attitudes towards Brazil.

Almost half of the respondents said that Brazil is a place that they would be interested in visiting, and listed it as one of their first three choices of a country within the western hemisphere that they would choose as a country for vacation. These responses were divided almost equally between first, second or third choice. (A very small minority mentioned Brazil as a place where they would definitely not spend a vacation.) The other half of the sample made no mention of Brazil as a place they would or would not want to visit.

However, the picture of what Brazil represents to these people is rather vague. There are no clear cut attributes that emerge with any clarity.

This is undoubtedly due in part to the fact that these people were not probed in any "depth" on their attitudes and impressions of Brazil.

It is significant that Rio emerges as a goal of this conjectured travel. Rio, or some aspect of it such as Sugar Loaf or Copacabana, is mentioned as a place they'd like to visit or as a place well known from pictures they've seen, or from hearing other people's descriptions of it.

Brazil is described as being "gay and exciting" as well as "romantic" and yet specific examples of what these terms mean is not evident. Another image of Brazil is that of a "modern, advanced and up-to-date" country, but beyond the fact that Brazil is seemingly highly industrial there are no specifics as to what these terms mean.

The scenery of Brazil is mentioned as having appeal, but again this is described in broad generalities, such as "pretty" or "natural" or "interesting." Not once do they mention realities that one might expect in connection with Brazil's scenery.

Even though an interest in going to Brazil has been expressed, there exist certain negatives, or reasons why they have not gone. These are:

1. It is "too far away";
2. It is too expensive to get there; and
3. They do not know enough about Brazil.

A somewhat typical quote which illustrates the third point mentioned above is "Brazil...I have never read or heard anything about this being a good place for tourists to go. They must not advertise for tourists."

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In summary, it can be said that Brazil is not rejected as a possible vacation trip, and this already existing interest is exploitable. However, this interest is somewhat vague because it has not been bolstered with enough concrete information to overcome the concept of Brazil being "too far away" or of this distance being too expensive to traverse for vacation purposes.

It should be emphasized that the validity of the foregoing picture as being indicative of the existing situation regarding Brazil as a tourist potential can only be determined by much more extensive research.

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SECTION II

EXTERNAL COMMUNICATIONS OBJECTIVES

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II. EXTERNAL COMMUNICATIONS OBJECTIVES

The single prime objective of the overall program, of course, is to increase the flow of tourists from the U.S. to Brazil as a means of aiding Brazil's economic development.

The research findings outlined in the foregoing "Situation Section" direct us to definite areas of opportunity and activity.

The following specific objectives have been established to provide, within each area of activity, a goal to be reached in order to accomplish the single prime objective.

Communication Objectives to be Accomplished in the U.S.

1. To communicate to Americans the positive tourism advantages of Brazil as a place to spend an entire vacation.
2. To promote Brazil among U.S. Travel Agents with the objective of securing their important influence on potential tourists.
3. To provide Travel Editors with news and pictures about Brazil and her people.
4. To activate the Travel Wholesalers and Carriers to develop all-inclusive Brazilian tours and feature Brazil in all their South American itineraries.

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5. To coordinate and tie in with the public relations activities of the Carriers, and encourage special promotional events.
6. To integrate and pace the entire communications program with the availability and development of tourist facilities in Brazil.
7. To maintain a continuing pulse of trade and consumer attitudes as they may be influenced by public events.

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SECTION III

THE THREE YEAR PLAN

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I I I. THE THREE YEAR PLAN

Introduction

After careful analysis of the Situation and Objectives, a Three Year Plan has been developed around the Purchase Proposition, involving Research, Sales Development, Public Relations and Advertising.

In presenting this Plan, we recognize the prevailing tendency of most Americans to want to see more than one country in South America. Further, we understand that travel agents are prone to sell a complete South American tour, rather than an all-inclusive Brazil tour, particularly with the incentive of discounted special excursion fares.

However, we feel that this situation has been brought about because of the almost complete lack of information and promotional effort on the part of any South American country. This lack creates an opportunity for an aggressive campaign, and the country which takes the leadership in going after the U.S. travel market would be in an advantageous position.

As other South American countries awaken to the opportunities of tourism, then Brazil could be sold as part of a two-country or three-country tour of South America. However, the success of this concept would take considerable time to implement, because it would require the participation of other South American countries, sharing of advertising funds and coordination of carrier and travel agent activities.

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Specific recommendations and budgets for accomplishing this plan will be presented. It should be emphasized that the total impact of all these communication channels is needed in order to change present trade and consumer opinions about Brazil.

A. THE PURCHASE PROPOSITION

A well integrated and coordinated communications program must first define the one basic idea to be communicated before detailed recommendations can be developed.

In the case of Brazil, this basic idea, or Purchase Proposition, will be the motivating force that will ultimately influence people to seriously consider Brazil for a vacation, and cause the travel agent to recommend Brazil to his clients as a fine place to go.

What is the single idea about Brazil that can be communicated that will accomplish this end? In the advertising recommendations a detailed explanation of the creative philosophy which explains the Purchase Proposition is outlined.

For the moment, we can say that many Americans think of Brazil as a great untraveled land with one magnificent city (Rio) - a land of "big" contrasts ranging from the most modern architecture to the primitive world of the Amazon.

This is not a country that the unseasoned traveler would select for his vacation. This traveler is more concerned with first seeing the well

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publicized sights of Europe where he knows what to expect. Therefore Brazil's appeal during Phase 1 is directed to the more experienced traveler who may be so used to the familiar that he is seeking a more adventurous vacation.

With these psychological factors in mind, we have conceived the Purchase Proposition for Brazil to be -

BRAZIL IS THE LAST GREAT LAND OF
ADVENTURE IN THE WESTERN WORLD FOR
THE ROMANTIC TRAVELER.

Every communication medium to be used will be keyed to this basic idea.

In each of the following recommendations this Purchase Proposition has been projected to the particular audience involved. The Purchase Proposition may be communicated in one way to the Travel Agent - in different words to the Carrier - and in still another form to the potential tourist. But all communications have one single objective - the building of a specific Prazilian image and creating the desire to visit this great land.

B. RESEARCH

The survey of the travel experts who visited Brazil was limited to an appraisal of the existing facilities and conditions within Brazil, as outlined in Book I of this report. Inasmuch as this survey covered only the internal conditions of tourism within Brazil, it is important to consider what additional research is necessary to determine what the

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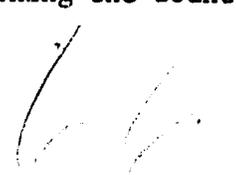
situation is regarding Brazil's tourism outlook in the United States. While limited data have been presented regarding the attitudes of Americans toward Brazil, these findings are only tentative and need to be validated by further full-scale investigation.

Ideally, the type of research described under part 1 should be done prior to initiating any full-scale external communications program. For this reason we recommend that this research be done during Phase I of the overall three-year plan, which is described later. While the consumer advertising and public relations during Phase I will be a limited effort, the primary emphasis during this stage will be directed at the vital basic area of sales development - working with travel agents in giving them the proper aids so that they can effectively sell Brazil to potential customers. When the research findings become available they will provide a more definitive basis for expanded advertising and public relations activities during Phases II and III.

The recommended research to develop needed information for a full-scale external communications program is described below.

1. Exploratory Image Study of Selected American Households

Past studies have indicated that every country has, at a given point in time, a "personality" or "image" in the public mind. This "image" is generally consistent from person to person, and cuts across income and occupation groups. It consists of a group of stereotyped notions and associations concerning the country in question.



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A country's "image" at any given moment may be favorable or unfavorable. It may be vague and undefined, or it may be specific and detailed. The "image" can be measured or evaluated at any moment in time but it is never static.

It changes as people get new ideas and associations about the country, or as public relations or advertising efforts or specific actions by or in the country induce a change. Although it cannot change overnight, the "image" of a country can be purposefully changed or improved over a period of time by a variety of programs of communication and activities.

The immediate objective of this pilot study is to uncover elements of strength and weakness in this image on a qualitative basis. The Brazilian image indicated by the survey can then provide the basis for immediate activity - possible corrective action plus positive communication.

Method

The function of image study is to find out the psychological characteristics, understand the needs, predispositions and resistances that exist in people's minds concerning Brazil; to discover the basis for their feelings; to find the appeals most apt to move them.

The depth interview technique will be used to discover the consistent notions, attitudes and prejudices which form the basis for the image of Brazil. It does not aim at a physical description of present and

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potential visitors in terms of their age, income, education, where they live, size of family, or other background characteristics of that nature. Such investigations are the important task of market research based on large-scale sampling, which is described in detail later in this proposal.

The "depth" interview is a flexible "conversation" between the trained interviewer and the respondent which generally lasts about an hour and a half. The interviewer follows a guide list of question "areas." Characteristically, these question "areas" cover not only the specific individual's behavior which is being studied, but also how this behavior relates to the broader context in which it takes place. On each topic in the guide list, the interviewer first allows the respondent to talk himself (or herself) out spontaneously. Then if a complete understanding of the respondent's attitudes has not been reached, additional probing questions are asked to clarify or expand the information. Care is taken to avoid leading or guiding the replies. Answers are recorded verbatim.

All interviews are made in person by appointment. The respondent is assured of anonymity, and each is given a small gift as a token "thank-you" for his or her time.

The sample for this phase would consist of 100 persons, 50 who have been to Brazil and 50 who are financially and geographically similar to those who have been to Brazil but have not visited the

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country. The sample will be diversified by age, income, marital status, and sex, in order to avoid bias.

Sample size need not be large in qualitative investigations of this nature. Attitudes tend to be quite consistent, and to cut across demographic groupings. We have found from previous surveys that 100 "depth" interviews are ample to reveal a country's "image" in full detail.

The cost of the proposed survey would be \$8,000 and would take 12 weeks to complete.

2. Survey of Current American Tourist Trade

Who makes up the most readily available market that can be tapped for increasing the tourist trade to Brazil and where are these persons located? This information can be most quickly obtained through a survey of tourists currently traveling in Brazil. The objective of this part of the research program is to study in detail the Who, When, Where and Why of the current market for Brazil tourism so that this market can be more thoroughly tapped. It will have as its further objective the quantitative validation of the qualitative findings outlined in part 1 above.

The first phase of this study will consist of interviews with tourists entering Brazil. These travelers will be questioned to determine their socio-economic characteristics, their vacation habits and previous vacation experiences. In addition the reasons

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for their visit and their expectations regarding Brazil will be explored. They will be asked also about the nature of their trip, e.g. whether it was part of a tour, whether they made arrangements through a travel agent, other places visited on this trip and related questions.

The second phase of the study will call for interviews with tourists returning from Brazil. They, too, will be questioned about their background characteristics, vacation habits, and the purpose and nature of their trip. In addition, these returning travelers will be asked for information about the things they saw in Brazil, the places they visited, what they liked most and what they liked least, as well as what manner of items they purchased.

Method

The sample of tourists visiting Brazil will be selected on a two-stage basis. Key points of entry will be chosen so as to include both sea and air travelers. A sample of 150 entering travelers to Brazil will be interviewed at steamship docks and air terminals as well as hotels. Scientific sampling techniques will be used in selecting this sample.

Similarly, interviews with about 150 departing travelers from Brazil will be made at docks and airports and at selected hotels as they are checking out. In total, a sample of approximately 300 interviews of this type will be conducted.

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The actual period of interviewing would take approximately 5 to 6 weeks. The formal questionnaire to be used will be developed from information obtained from preliminary depth interviews conducted with several such travelers. The number of foreign travelers arriving in Brazil in any one month is comparatively small. Further, the number of tourists who would be eligible and would consent to an interview would be still fewer. Because of the small size of this sample, it would be essential to know certain facts about all incoming and outgoing American tourists.

We propose to enlist the aid of both the official Brazilian National Tourism Authority and the Customs Department of the Brazilian Government to allow an English speaking person to be present and work as part of the customs team. Their sole duty would be to ask 4 short questions of one member of each party of arriving Americans and 5 short questions of one member of each departing American party.

These questions would be:

Incoming

1. City and state of traveler's origin
2. Number of persons in the party
3. Visiting Brazil for business or pleasure
4. Estimated number of days stay in Brazil

Outgoing

1. City and state of traveler's origin
2. Number of persons in party
3. Have visited Brazil for business or pleasure

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4. Number of days stay in Brazil
5. Determine whether they were asked these questions upon entering Brazil

To facilitate this, the interviewer would use a printed check sheet. These questions would take approximately 30 to 45 seconds and would be asked in such a manner as to not interfere with or slow down the usual customs procedures. Interviewers would be on duty during regular customs hours and would be stationed at the selected customs offices which have the heaviest flow of American tourists. This phase would be conducted during the same interval of time as the 300 interviews with the incoming and departing visitors.

The three phases of this study will then provide data on who the tourists are, where they live and what are the biggest attractions to them in Brazil as well as other valuable data which could not be otherwise obtained.

This "Survey of Current American Tourist Trade" would cost \$15,000 and will take approximately 4 months to complete.

3. Future Research

It is recognized that additional research to assess the actual effects of the tourist development program is desirable. Such research could be conducted two years after the program is initiated.

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For example, Travel Agents and Editors could be interviewed to determine their up-to-date image of Brazil, their degree of satisfaction with promotional literature, etc. Also, changes in the composition of visitors to Brazil could be measured and current tourist attitudes toward Brazil determined.

It is premature at this time to spell out such studies in detail as their overall design and appropriate methodology must be determined in the light of the then existing situations.

It is estimated that this evaluation research can be completed at a cost approximating \$20,000.

C. SALES DEVELOPMENT

1. Need for Sales Development

A well planned and executed sales development program is fundamental in promoting tourism to Brazil. The people who sell tourism to the American public must first be persuaded to sell Brazilian tourism against tourism for competitive places. These people must first be educated about Brazil and then be given the necessary materials and guidance so that they can sell Brazilian tourism effectively and at a profit.

The people who are in a position to promote tourism directly with the American tourist are divided into three groups:

1. Travel Agents
2. Airline Companies
3. Steamship Companies

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Interviews were conducted with key companies and executives connected with these three groups in order to determine their impressions about Brazil. Our findings are summarized as follows:

1. Detailed information is needed about Brazil, its facilities and attractions.
2. Existing descriptive materials are inadequate.
3. Information and brochures are needed on specific package tours and vacations.
4. A central place must be established where this information can be obtained.
5. A coordinated effort to furnish necessary programs and materials on travel to Brazil must be maintained.

The popularity of package tours has increased in relation to the expanding travel market and without exception all people who are engaged in this type of selling have specific planned packages that they can sell to a customer. They must be in a position to say to their prospective customers, "Here is an itinerary showing specific places that you can go to, and here are the specific activities that are included in this tour, and it will cost you this amount of money."

Travel agents are out to sell their prospective customers a complete itinerary (or package tour) be it for one week, two weeks, or three

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weeks. The itinerary may include round trip transportation to a specific city, hotel bookings in the specific city with specific side trips to various places of interest all included for one package price. In doing this he makes 10% or more profit instead of 7% which is all he would make on transportation. As an example, travel agents believe that they could sell successfully a package which would include a two week's stay in a modern hotel in Rio, plus side trips to Petropolis and Teresopolis.

Brazil must recognize that it is in competition with such attractions as Europe, Bermuda, Jamaica and other vacation destinations where travel agents find it much easier to sell packages and trips to the American tourist. Aside from the importance of making available to these people factual and interesting data in the form of colorful materials, brochures and pamphlets, there must be a sales organization and a central office for the dissemination of the material and the information which is so vital to the success of any tourism program.

The staff of any such office should be trained adequately in sales development work and given all the assistance and selling tools necessary to contact travel agents, airlines and steamship companies.

In addition to the tourism staff in New York, a travel expert should be assigned to this office by the sales development agency who will perform the following functions:

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1. Help train personnel and assist in setting up office procedures.
2. Assist the director in coordinating sales, merchandising, public relations and advertising activities within the plans prepared by the agency.
3. Make sales calls on key executives of major travel agencies, airlines and steamship companies.
4. Coordinate the activities of the "sales-merchandising" men in New York and agency field representatives in Chicago, Miami, and Los Angeles.

These men plus the travel expert should be responsible for contacting travel agents, airline company and steamship company executives, and presenting complete plans to them covering all details on travel and vacations in Brazil.

During Phases I and II, agency field representatives should be available, one in Chicago, one in Miami, and one in Los Angeles, in addition to the people in New York, to contact key travel agents and carriers on a part-time basis to sell the programs formulated by the agency.

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2. The Sales Development Plan

It is recommended that the plan of action be divided into three phases as follows:

PHASE I To be started upon approval of plan and budget for a 12 month period if all activities can be coordinated between Brazil and New York.

PHASE II A period of accelerated exploitation to start immediately after Phase I and to continue for a 12 month period.

PHASE III A period of continuous exploitation to continue for a 12 month period following Phase II.

* * *

Phase I -- During the introductory period the following should be accomplished:

1. Train personnel -- both "sales-merchandising" and clerical.
2. Develop package tours.
3. Create and produce all printed promotional materials.

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4. Set up prospects -- start direct mail campaign to key executives of airlines, travel agencies and steamship companies.
5. Continue direct sales work with agents, airlines and steamship companies to sell tourism to Brazil.

Materials Needed During Phase I

- a. Illustrated Booklet on Brazil. The areas selected for initial exploitation should be highlighted. This booklet should contain a great deal of specific information about places of interest in Brazil. It should be written with the American tourist in mind, and contain illustrations that will be interesting and romantic, in standard sizes (9" x 4"). The copy should contain enough "sell" to deliver an effective sales message to its readers.
- b. Travel Agents Manual on Brazil. This book is the basic data book on Brazil. It must be made available for agents to use as their prime source of all details connected with selling tourism to Brazil. Agents and airlines refer to the manual as their "selling Bible." It should contain detailed information on the following:
 - Transportation to and from Brazil
 - Transportation within Brazil
 - Package Tours

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Hotel Information - accomodations, costs, etc.

Points of interest - Tours - Side trips

Night Clubs

Restaurants

Sports facilities and activities

Special Events

Miscellaneous data

Exchange rates

Customs regulations, etc.

This manual should be in loose leaf form with a good cover and section separators. Information must be furnished to agents on a continuous basis whenever necessary or whenever changes are made.

The organization and format of this manual will be prepared by the agency and will contain detailed data furnished by Brazilian tourist authorities and then distributed to holders of this manual.

- c. Special Package Tour Folders. These folders must be colorful and printed in quantity for distribution by agents to prospective customers, in standard sizes. As the new and special tours or package tours are developed, new folders must be printed.

Special tour folders are very important sales instruments and are used by all travel agents. Consumers judge the tour

or vacation by the quality and exactness of the material contained in these folders. They must be well written with interesting illustrations and feature specific places and hotel accommodations. Prices should be indicated on separate rate sheets.

The following package tours are recommended as a starting point:

1. One week tour of Brazil
2. Two week tour of Brazil
3. Three week tour of Brazil
4. One and two week vacations in Rio, Sao Paulo - Santos, including interesting side trips.

d. Sales Presentation Materials

Visual presentation materials must be used in selling airlines, travel agents, etc. on promotion of tourism in Brazil. These presentation materials will also be necessary in quantity for use within these organizations to educate their personnel on the program. The following is recommended:

1. Strip film in color for agents and selling personnel to be used with larger groups after solicitation of executives.
2. Visual presentation materials -- Easel presentations, charts, forms, etc. containing training materials on the proper handling of potential Brazilian tourists.

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- e. Mailing Pieces. A series of at least five mailing pieces should be sent to the 500 leading executives of the travel groups to be reached. Where a large sales force is not available, expert use of direct mail can help accomplish the selling job. These mailing pieces should contain "attention getters" as well as basic selling messages. It would be desirable if each mailing contained a unique gift typical of Brazil of about \$1.00 in value to gain the recipient's attention and increase the likelihood of his reading the selling message.

Phase II -- After completing Phase I, Accelerated Exploitation

should take place. Activities would include the following:

1. Sales meetings with leading travel agents in key cities.
2. Display program - placement of colorful displays in key travel agencies, department stores and other high traffic locations.
3. Distribution of posters and materials.
4. Special promotion - Carnival in Rio is one example - to include special promotional materials, folders and displays, plus presentation materials with travel agents, airlines, steamship companies and visiting dignitaries.
5. Active participation in trade conventions.

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Phase II will actually be the period of concentrated effort, and would extend over a period of approximately 12 months. This period should produce the concentrated effort of all cooperating travel agencies, airlines and steamship companies to get Americans to visit Brazil. Every opportunity will be taken to create a favorable image of Brazil and to produce maximum results during the period.

Phase III -- After establishing Brazil as a tourist attraction, all efforts must be continued not only to maintain this position, but to enhance it.

With the very keen competition for the American tourist's dollar from countries throughout the world, it will be mandatory that Phase III be continued on an aggressive basis with the purpose of constantly improving the following:

- Services and Facilities
- Special Attractions and Promotions
- Sales Brochures
- Display Materials
- Training Programs
- Package Tours and Vacations

During this phase it is recommended that a color motion picture film be developed for maximum exposure in movie houses, television stations, schools, clubs, church

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groups and as a loan to travel agents and carriers.

By the time Phase III is entered an evaluation should be made of the programs and materials to date, plus the reaction of travel agencies, airlines and steamship companies. All this will serve as a basis upon which to formulate future plans for sales development programs.

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Sales Development

Phase I Budget Summary (12 Month Period)

<u>Item</u>	<u>Amount of Item</u>	<u>Cost</u>
Booklets on Brazil Art, Mechanical and Creative Work	30,000	\$ 25,000
Travel Agents Manual	500	5,000
Training and Sales Material Easel Presentation and Materials		6,000
Color - Slide film with 25 extra copies		10,000
Special Folders -- Five different folders	40,000 (of each)	40,000
Direct Mail -- 5 Mailings	500	3,000
Consulting fee including full time travel expert assigned to supervise and coordinate activities in New York, plus two part-time men - one in Chicago and one in Los Angeles.		60,000
		<hr/>
Total Cost - Phase I		\$149,000

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Sales Development

Phase II Budget Summary (12 Month Period)

<u>Item</u>	<u>Amount of Item</u>	<u>Cost</u>
Large colorful displays to be installed in key locations, including contract for installation charges with window trimming company	200	\$ 10,000
Materials for sales meetings and Agents Groups		5,000
Provision for creation of new booklets, tour folders, selling materials. Also printing of additional quantities of materials produced during the first year.		12,000
Posters and materials -- four different posters -- and partial cost for package promotions.		10,800
Special development campaign -- Carnival in Rio -- complete program -- for materials and meetings, etc.		25,000
Consulting fee and cost of full-time tourism expert and two part-time men in Chicago and Los Angeles		60,000
		<hr/>
Total Cost - Phase II		\$122,800

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Sales Development

Phase III Budget Summary (12 Month Period)

<u>Item</u>	<u>Cost</u>
Continuous training materials	\$5,000
Special Event Promotion	25,000
<p>Note: The special tourism executive will have trained the personnel and obtained the cooperation of the travel agents, and his services will no longer be needed.</p>	
Provision for printing of materials for agents and consumers, such as new manuals, tour folders, presentation materials, and direct mail campaign.	12,000
Replacement of window displays and continuance of window trimmers fees.	10,000
Production of a color motion picture film featuring interesting places in Brazil. To be shown in movie houses, television stations, schools, church groups, as well as being used with travel agents and airlines.	30,000
Posters and other point-of-sale materials. These can be produced in Brazil where poster work is excellent.	4,000
<hr/>	
Total Cost - Phase III	\$136,000

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D. PUBLIC RELATIONS

The purpose of this section is to present basic recommendations for the initiation of a public relations program for the promotion of tourism to Brazil.

These recommendations will cover three stages of development.

PHASE I The exploitation of short range objectives through immediate publicity.

PHASE II Utilization of public relations activities in support of the programs for sales promotion and advertising...

The development of ideas and material for the achievement of long range objectives to be determined upon conclusion of the recommended research program.

PHASE III Continuation and expansion of Phase II as the tourism resources within Brazil are developed and expanded.

It will be the responsibility of the public relations agency to lend its full efforts towards achieving the prime objective set forth earlier by directing its skills in the following areas of development:

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- . To further develop in the United States of America a public attitude of friendship, understanding, and respect for Brazil and her people.
- . To disseminate accurate information in the United States with respect to the hospitality of the people of Brazil, and to illustrate the continuing opportunity for discovering the thrills and romance that a Brazilian vacation has to offer.
- . To emphasize the cultural background of Brazil.
- . To report and illustrate to the people of the United States the development and beautification of your cities and resorts.
- . To emphasize the will of the Brazilian people to please and to welcome the American traveler to her shores.

This presentation sets forth the methods and manner in which the public relations agency proposes to implement these purposes.

1. Methods to be Employed

Public relations, of course, is neither a cover for shortcomings, nor a substitute for the "positive." Publicity -- so-called "free publicity" -- cannot make a cause of action or a product or an industry popular if it is against the public interest. It will be the function, therefore, of public relations to create a positive interest on the part of the would-be American traveler by publicizing, through the medium of editorial and feature columns,

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those points of positive interest that Brazil holds out and, in this way, support the sales development and advertising programs.

The written word, the spoken word, and pictures are the vehicles to be used in conveying desired messages about Brazil's tourist resources to the general public and the travel industry in the U.S. News items, feature articles, and picture stories will be produced for placement with appropriate publications and radio and TV outlets through the medium of the public relations agency.

When an occasion of special news value warrants, the public relations group will arrange press interviews for Brazilian personalities or officials whose "words" will reach a public in the U.S. and contribute toward building the "image" of Brazil as an interesting place to visit.

When a press conference is arranged, the news will reach American audiences through the wire services, and supplementary stories prepared by the staff of the public relations agency for release in the U.S.

News developments and human interest angles having to do with Brazilian tourist features should be put into form for use on television and radio when such material lends itself to broadcast use.

The comprehensive public relations program will make use of editorial channels in the U.S. which afford indirect as well as

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direct means of communicating information about Brazil's tourist attractions; the sum total effect being reinforcement of the desired "image."

From the public relations agency's office located in Brazil specially trained, experienced personnel would maintain contact with Brazil's national tourism body, send background material on request from New York for publicity application, and coordinate the internal public relations tourism-orientation program with the Communications Committee of the national tourism body.

In the first year of the public relations program, the "short-term" tourist attractions will serve as bases for the development of travel stories on Brazil. During the next two years, as part of the expanded program, additional places (listed in Book 1) will be selected for presentation in the U.S. through public relations communications channels.

In the pages that follow, while we show all the services that should be utilized in a full scale program, we specify those that would be provided during the first year during Phase I, and how they would be expanded in successive years.

2. Media to be Utilized

The public relations agency should employ, in the various phases of the program, its experience and skills in disseminating the "image" of Brazil as a tourist land through the many facilities of total communications available in the United States:

1,760	daily newspapers
8,478	weekly and semi-weekly newspapers
3	major news "wire services"
50	major newspaper syndicates
205	daily newspaper columnists
6	magazine supplements for newspapers
104	leading consumer magazines
2,978	business, trade and professional magazines
34	leading agricultural magazines
1,744	college and university newspapers
96	labor union newspapers
8,500	trade and professional association publications
7,000	industrial "house organs"
5	employee reading rack services
833	foreign language periodicals
260	library bulletins
198	book publishing houses
3	television networks
496	local television stations
4	radio networks
3,566	local radio stations
38	producers of newsreels and films serving television
18,000	motion picture theaters
--	as well as fairs, trade shows, concerts, art exhibits, sports events, club programs, conventions, courses in the schools, window displays, records, package premiums, etc.

a. The U.S. Press

While no public relations organization can guarantee the placement of stories in specific publications at specific times, it is worth noting that the public relations agency finds existing areas of editorial interest in all of the following subjects where accentuation of the positive can obtain immediate results.

Some places with particular interest to American travel editors and their audiences are:

- 1) The glamour of untouched and unexplored Rio to give wider appeal to that which is already known about the city.
- 2) The life "within the walls" at the resorts of Petropolis and Teresopolis as a means of accentuating the graciousness of living of the Brazilians.
- 3) With the rage for "Westerns" in the United States, the cowboy's counterpart -- the Gaucho and his free way of life -- would generate interest from many U.S. media, such as TRUE and HOLIDAY magazines. Television programs such as Wide, Wide World and Lowell Thomas' High Adventure would also be contacted by the public relations agency to interest them in Brazil's efforts to push back the frontiers.

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- 4) The glorious and awe-inspiring spectacle of the Iguacu Falls for the sightseer and the fishermen interested in capturing the "king" of all fresh water game fish -- the fabulous "Dorado."
- 5) The pleasures of "just resting" at the health resort areas of Caxambu and "taking the waters" at Pocos de Caldas.
- 6) Personal participation in the thrills that a "river safari" from Manaus offers suggests a wealth of story material, not only for the editors of sports and field magazines but for house organs and weekly supplements of the leading newspapers.
- 7) Bahia and its colorful surroundings are a completely untapped area to be thoroughly exploited for the benefit of travel editors and editors of cultural columns.

During Phase I, it will be the public relations agency's function to explore thoroughly these areas from the standpoint of generating and creating exciting stories and graphic material illustrating the beauties of the above resorts.

Because these lend themselves to immediate publicity, information available from the survey will be used to prepare a planned program of exploitation as a guide to teams of writers

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and photographers who will be selected for this purpose. Where practical, Brazilian writers and/or photographers will be encouraged to work with their counterparts sent from the U.S. The advantages to this system would be to secure the widest possible coverage at a minimum cost and, at the same time, provide a training school for Brazilian nationals who would serve in the expanded programs to be recommended under Phases II and III.

b. U.S. Television and Radio

During the course of the three year period, the public relations agency will adapt for television and radio coverage in the U.S. those story angles and news developments listed in the preceding section on "The U.S. Press" which lend themselves to broadcast use -- either through film clip, tape recording, news commentary insert, or arranged spot and interview coverage.

Publicity via radio-television stations -- on newscasts, disc jockey programs, homemaker and special service programs -- is one of the most important mediums in America today, with audiences numbered in the millions, tuned to 4,000-plus stations.

Most of these stations carry network programs during certain hours of the day, but all of them produce local programs -- with local personalities conducting music shows and home service programs of all kinds. The public relations agency

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will cooperate with a special group of these stations in furnishing them a script service directed primarily at the daytime home service-type program.

c. Motion Pictures

As proposed under the section devoted to sales development, budgeting for a motion picture film is recommended in Phase III. However, publicity can be generated around movies shot on location in Brazil which would be shown later in the United States. Thus, the U.S. release and showing of feature films shot in Brazil will be used by the public relations agency to obtain additional publicity for the country.

During Phases II and III, the public relations agency will assist in the development of such publicity with the studios and will work with film distributors in the dissemination of material for local use coinciding with the opening of such films in each city. Among the possibilities:

- 1) Appearance of stars on television
- 2) Placement of featured Brazilian actors on TV and radio programs.
- 3) Stories on featured Brazilian actors in the U.S. fan magazines.

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- 4) Stories on the making of such films in Sunday supplements of newspapers, on entertainment pages of newspapers, and in movie fan magazines.
- 5) Use of sequences from the motion picture on TV programs and in magazines.

d. Special Events

A year-round calendar of special events would be of tremendous assistance in expanding publicity, increasing individual and family tourist traffic, lengthening tourist stays in the country, and increasing tourist expenditures in Brazil.

The public relations agency should draw up a program of events during Phase I for exploitation with various segments of the U.S. public during Phases II and III. The planning task would be an arduous one, requiring in most instances the checking of ideas with the local businesses and communities involved and the conduct of research within the geographical areas where events may be held, as well as with the prospective "markets" for U.S. attendance and participation.

Among the special events, possibilities which the public relations agency should explore are the following:

- 1) A possible festival of folk-lore and agricultural pursuits held in conjunction with the coffee harvest.

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- 2) A "Hemisphere Fair" type of event to be held in one of the major cities taking its theme from the growing relationship and cooperation between the peoples of South and North America.
- 3) An invitation to the American Society of Travel Agents (ASTA) to hold their annual convention in Brazil.
- 4) A festival of Regional Brazilian music and dance enlisting the participation of prominent composers, conductors and choreographers from each of the States.
- 5) A Latin American Architectural Symposium.
- 6) Annual institution of "gaucho" rodeo.

The necessary overtures with the parent groups and the potential "producers" within the U.S. and Brazil must be made to sound out the extent of interest and the degree of participation which might be expected. A fixed program of this nature will provide the public relations agency with yet another vehicle for creating editorial interest on the part of the U.S. press.

3. The Three-Year Plan

The ICA Survey of Brazil, together with other subsequent studies conducted by the agency, has revealed certain attitudes and notions held by peoples of both countries that can be given immediate attention.

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An analysis of the facts we have so far indicates that exploitation of "positive" public relations activities should be immediately conducted in Phase I among:

- . Travel Agents and Carriers
- . Travel Editors
- . Segments of the traveling public in a position to visit Brazil under current conditions.

a. The Travel Agents and Carriers

Working with the group assigned to the sales development program, the staff of the public relations agency in Brazil will work in close liaison with the national tourism body collecting descriptive and illustrative materials of improved services, new facilities, developing resort areas, etc., which the Sales Development Group can interpret and use in their educational work with the travel agents and carriers.

b. The Travel Editors

The public relations agency will work through the same channels in its work with the travel editors, to generate, gather, and develop materials which will be processed in New York for dissemination to the editorial field of travel. Such materials, designed to communicate the appeals of Brazil's touristic

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features, will be aimed at travel industry through the means of approximately:

- 207 daily newspapers with travel editors
- 20 travel magazines
- 30 leading consumer magazines with travel departments
- 12 syndicated travel columnists
- 120 automobile-travel publications
- 12 TV-radio travel departments
- 50 top free-lance travel writers

During Phase I, visits to Brazil by representatives of the press should be arranged in order that these key communicators may enlarge their own understanding of the country's facilities and develop their own story ideas and material. This activity will continue to be developed into Phases II and III. Two types of press tours will be considered:

- 1) An exclusive, pin-point itinerary tour for specific travel editors and writers -- including full inspection of Brazil's program for the expansion of tourism. (Phase I)
- 2) An organized, "point of editorial interest" tour for a generic group of editors and travel agents -- with common

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transport, hotel facilities, entertainment, press conferences, and receptions.^{1/} (Phases II and III)

c. A Brazilian Newsletter

The publication of a monthly newsletter is recommended. The public relations agency will assist in drawing together and preparing the material for this newsletter.

The newsletter should be prepared on a bi-monthly basis, i.e., six issues per year. It would be designed to interest travel agents, the carriers and also travel editors. It would be sent to a selected list of approximately 3,000. Because there might be a limited amount of material that could be developed for it during the first year, the public relations agency recommends its incorporation in Phase II rather than at the commencement of the program.

Recommended format is 8-1/2 x 11 in size, 2 to 3 pages in length, depending upon the quantity of truly important subject matter.

^{1/} Because of the high cost of transportation to Brazil, the degree to which group tours could be encouraged to go to Brazil would depend, to some extent, on the cooperation received from the various transportation interests in the country.

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4. Organization and Implementation

The public relations program would be implemented through two agency service groups -- one located in New York and the other in Rio. These two service groups would, of course, be supported by the internal service divisions of the public relations agency as well as by branch offices throughout the United States.

Initially, the public relations agency would appoint an Account Director in the New York Office who would be responsible for the management, service, and contact of both service groups.

His counterpart in Rio would be the Account Executive who would have a secretary during the first year. With the expanded programs foreseen for Phases II and III, both service groups would require additional personnel.

The duties of the service groups would include the generation, compilation, and processing of story material as described in previous pages, in addition to the very important service of counseling and communicating to all the interested parties within Brazil the progress made on the implementation of the program.

It will also be a responsibility of the public relations agency to establish continuing liaison with the advertising and sales development agencies as well as with members of the U.S. travel press and American organizations whose activities are involved with travel

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to Brazil. Similarly, the office of the public relations agency in Rio de Janeiro will establish regular contact with the Brazilian press and American wire services (UPI and AP) located there.

In this manner, editorial contact service in the U.S. will work two ways for Brazil: as a channel toward the press to aid in instilling more awareness of Brazil and acceptance for news about Brazil, and as a channel from the press to provide the editor with a familiar personal source, informed on his subject and experienced in the particular methods of this work.

5. Counseling

The counseling services of the public relations agency are as much a part of the program as the publicity it will develop. It is advisable that the Brazilian tourism authorities take full advantage of the varied talents and experiences offered by the agency and, prior to taking any action receive counsel on matters which can affect public awareness of the image of Brazil.

Two manners of counseling should be made available to Brazilian authorities by their public relations representatives, each of independent value yet interrelated, and both ultimately helpful toward successful accomplishment of the communications objectives in the United States:

a. Management Counsel

In the exercise of its franchise to increase tourist travel from the United States to Brazil, the national tourism authority, with subsidiary and affiliated tourist organs, will profit by consulting with the public relations advisors on matters concerning adjustments in "visitor plant" management.

b. General Counsel

Professional advice should be sought before actions are taken which will directly alter or stress the presentation to the American public of any of Brazil's tourist attractions, i.e.,

- . the renovation or creation of new tourist facilities;
- . production of new printed literature, posters, films, etc.;
- . participation in American attended special events, exhibits and trade shows.

The service groups of the public relations agency should be at the disposition of tourism officials in Brazil to counsel on the development of improved tourist-handling techniques, arrangement of special events and construction of new facilities, assuring that all possible is done to accommodate American tastes and expectations.

Public Relations

Budget Summary - Phase I (12 Month Period)

During Phase I the service groups in New York and in Rio would be established as follows:

NEW YORK

- Account Director
- Secretary
- Part-time use of personnel
- News Bureau
- Supervision

RIO DE JANEIRO

- Account Executive
- Secretary

Service Fee \$117,000.00

Out-of-pocket Expenses

Photographic File	\$7,000.00
Mimeographing	4,000.00
Mat Services	6,000.00
Travel	15,000.00
Miscellaneous	5,000.00

\$37,000.00

37,000.00

\$154,000.00

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Public Relations

Budget Summary - Phases II & III (Two 12 Month Periods)

During Phase II and through Phase III the service groups would be augmented by the addition of a part time Account Executive in New York and the full time of another Account Executive in Rio. With these additions and the extra work load called for in these two phases on the part of service departments of the Public Relations Agency, the service fee would be increased to..... \$174,000.00

There would also be an increase in the out-of-pocket expenses due to the expanded scope and the activities of the broader programs..... 46,000.00

\$220,000.00

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E. ADVERTISING

For Phase I of the program, the consumer advertising has a dual purpose, which is directed to both short-term and long-range objectives.

To provide a potent sales and merchandising tool to be used in sales development work with Travel Agents and Carriers.

To start developing an image of Brazil among consumer and trade alike that Brazil is the last great land of adventure in the Western World for the romantic traveler.

1. Creative Philosophy

A Purchase Proposition is that one idea, which when communicated to the consumer, will be most likely to move him to action. In the case of Brazil this idea will be in the form of a new image of Brazil conceived to appeal to a specific market of tourists representing the best potential at present for Brazil.

In view of the Internal Development needs reported in Book I, we do not recommend trying to appeal to every vacationist at this time. It would seem logical that the consumer advertising should also be planned in phases.

Most Americans lack knowledge about Brazil, except for Rio which is considered a glamorous city, and are prone to think

of Brazil as a far-off somewhat primitive land in the interior. Research from other travel industries indicates that the average vacationist has a resistance to the idea of going to some remote far-off place about which they know very little. Britain, France and Germany have been brought emotionally closer to the average American, and because of their advance knowledge of European countries, they do not have the fear that they may be cutting ties with creature comforts when they contemplate a European vacation.

Therefore we believe that the Brazilian advertising during Phase I should be directed to the more sophisticated traveler. This would be the traveler who perhaps, has been to Europe, a seasoned enough traveler to enjoy discovering places and things. This is also the kind of traveler who is not as disturbed by the lack of so-called conveniences. Finally, this is the traveler who thinks of his trip not as a "vacation" but as an "adventure."

Advertising cannot represent what Brazil does not have available at present, nor can a few advertisements achieve a consumer acceptance such as Mexico and France have done over a period of years, in making people fairly familiar with their culture, sightseeing activities, traditions, without having even visited the country. It is this kind of pre-familiarity or knowledge that must be developed before Brazilian advertising can successfully attract the volume market of travelers.

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In summary, the objective of the consumer advertising is to create a new Brazilian image that is exciting and compelling to both consumer and trade.

We recommend using full-color to capture the grandeur of Brazil and also to place Brazil in a competitive position with the advertising of the Carriers and other vacation lands which are in color.

We believe it is of paramount importance not to use typical, banal "Travelogue-type" photographs which are generally not dramatic, nor of distinctive interest. Since our advertising is very probably the first visual contact with Brazil by many of our readers since their grade-school geography days, the Brazil pictures must have the contemporary and professional elements of drama and action.

2. Strategy

Before creating a strong consumer interest in Brazil, through a major advertising investment, it is essential that the Travel Agents become knowledgeable about Brazil and are favorably disposed toward recommending a Brazilian vacation to their clients.

While it obviously would not be economically sound at this time to attempt to match the budgets in paid advertising of competitive vacation lands, it is imperative to make a "Show of Force", particularly to the "trade", to demonstrate that Brazil plans an aggressive program to develop consumer interest in Brazil, and which will direct potential customers to the Travel Agent.

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Unless the Travel Agent is presented with tangible evidence of this program, such as proofs and a schedule of advertisements, he will not be motivated to change his present negative impression of Brazil.

Further, without some actual indication of increased consumer interest in Brazil, it is understandable that the Travel Agent may not be inclined to recommend an all-inclusive Brazilian vacation package tour when he can make the same profit through the fast, easy sale of a complete South American itinerary featuring only well-known vacation spots.

The immediate advertising objectives may be achieved within a relatively limited budget, providing the advertising is adroitly and aggressively merchandised to the travel industry.

3. Media Recommendations

Media recommendations are based on the so-called "Show of Force" strategy which required sufficient advertising at the national and local level to make a strong impression among the travel industry and also to influence the consumer.

a) National Advertising

In order to make a "Show of Force" and create news in the industry, a dramatic break with traditional travel advertising should be made.

An unusual departure would be two insertions of a 4-page full-color "Print Travel Spectacular." This unique departure from conventional travel advertising would provide two exceptional merchandising opportunities:

- 1) To dramatize to the trade the power and "bigness" of Brazilian advertising - this in itself reflects a provocative image of the country.
- 2) To increase the impact of the advertising among the consumers through use of the same spectacular advertising at the point-of-sale.

In merchandising to the trade, the proposed 4-page "Spectacular" would be utilized as the spearhead of the selling program to Travel Agents. This might also be the theme for a Sales Promotion piece.

HOLIDAY Magazine is recommended as the major medium for two key reasons. The first is the editorial content of HOLIDAY, which is entirely conceived for the travel-conscious reader. The combination of its editorial content and advertising produces what its Editors like to call the "HOLIDAY mood."

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HOLIDAY is a monthly magazine with a current circulation of 900,000. It reaches a comparatively high income group, the median income of its reader-families being \$8,661 compared to the U. S. median family income of \$4,700. In addition, 62.9% of its families are in the \$7,000-and-over income bracket. These readers represent a large share of the potential market for Brazilian tourism.

The second reason for the selection, which is of vital importance during the first phase of the program, is HOLIDAY's strong acceptance and prestige among Travel Agents.

The American Society of Travel Agents has consistently referred to HOLIDAY as the magazine which "is doing the most to stimulate travel".

A recent survey conducted among active members of ASTA by HOLIDAY revealed the following information:

- 1) 83% believe that travel advertising in national magazines helps their own travel business
- 2) 68% regularly read or look through HOLIDAY.
- 3) 65% feel that HOLIDAY does the best job of any consumer magazine in

stimulating interest in travel. This is 7 times the number of mentions received by the second magazine.

The advertising proposed for HOLIDAY is two insertions, each consisting of a 4-page full-color gatefold insert. (A photostatic rough layout of one of these proposed advertisements is enclosed in the back cover of this volume.) The space cost for this advertising is \$35,814.50 per insertion, or a total of \$71,629.

b) Local Advertising

Although 88% of the Travel Agents believe that travel advertising in national magazines is an important influence in creating customers for foreign travel, they also recognize the "immediacy" value and flexibility of newspaper advertising.

To provide local support for the Travel Agent and to compliment the HOLIDAY advertising, it is recommended that a limited newspaper campaign of 3,600 lines be run in the Travel Sections of Sunday newspapers in the principal markets that account for an important share of foreign tourists.

Travel sections in the Sunday papers are recommended not only because the Sunday paper is large, but because the reader is in a relaxed mood.

The markets and newspapers selected are: New York Times, New York Herald-Tribune, Chicago Tribune,

Philadelphia Inquirer, Boston Globe, Dallas Morning News, Detroit News, Miami Herald, and Los Angeles Times. The space cost of this newspaper advertising would be \$44,129.

c) Trade Advertising

In line with our recommendation for heavy sales development work, with Travel Agents and Carriers, we believe that it is important to run an impressive and consistent campaign in the four major trade publications during the first phase of the program.

As a communications medium, these publications provide an opportunity for Brazil to establish a new image among the travel industry through advertising and in addition, it opens an outlet for Brazilian news releases. There is also the important political aspect of supporting the Travel Agent through these publications which is our reason for using all four major publications in order not to offend any single industry group.

To insure maximum readership and attention, we propose using a 2-page insert of a thick quality paper. The inserts will be in color. There will be 12 insertions in these monthly publications; ASTA, Travel Agent, Travel Trade and Travel Item. The cost, \$12,060 plus production.

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Phases II and III

The recommendation for print advertising during Phase I, was necessarily limited for the reasons stated in the media recommendation.

As Brazil makes progress with Internal Development, the advertising in turn must increase the flow of tourists. Therefore in Phases II and III the consumer advertising budget should be stepped up to \$225,000 for Phase II and then to \$300,000 for Phase III.

We do not believe it is practicable to make specific media recommendations for Phases II and III until we have had the opportunity to evaluate the findings of the research that is recommended in this program. However, it is clear to us even at this time that the frequency of the magazine advertising must be increased.

For example, at the end of Phase I, we would re-examine the use of the budget for HOLIDAY which is our major advertising medium. We would also consider expanding the newspaper campaign. THE NEW YORKER and NATIONAL GEOGRAPHIC would be evaluated, as they are excellent media for tourism.

The travel industry is a volatile, fast-moving industry and we must remain in a flexible position in order to meet changing consumer desires, and even world events.

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Advertising

Budget Summary - Phase I, II, III

Phase I

Holiday:

2 insertions, each consisting of
a single gatefold (3-four color
pages) plus 1-four color page.
2 insertions @ \$35,814.50 \$71,629.

Newspapers (Sunday Travel Sections):

Total 3,600 lines in the New York
Times, New York Herald-Tribune,
Chicago Tribune, Philadelphia
Inquirer, Boston Globe, Dallas
Morning News, Detroit News, Miami
Herald, and Los Angeles Times 44,129.

Trade:

12 insertions, 2 page inserts each,
in ASTA Travel News, Travel Agent,
Travel Trade, and Travel Items 12,060

Total Space Cost \$127,818.

Preparation Charges 42,182.

Total \$170,000.

Phase II 225,000.

Phase III 300,000.

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SECTION IV

BUDGET SUMMARY

I V . B U D G E T S U M M A R Y

This external communications program has been designed to function as a whole. It must be emphasized that it can only operate at maximum effectiveness if each of the component parts are executed in the manner which has been outlined. All pieces of the program are essential to produce the desired results.

Outlined below is the recommended budget covering each communications program for the three-year period:

	(M Dollars)			
	<u>Phase I</u>	<u>Phase II</u>	<u>Phase III</u>	<u>3-year Total</u>
Research	\$23		\$20	\$43
Sales Development	149	123	136	408
Public Relations	154	220	220	594
Advertising	170	225	300	695
Total by Phases	<u>\$496</u>	<u>\$568</u>	<u>\$676</u>	<u>\$1,740</u>

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