



REPORT 1: REGIONAL TOURISM



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EXECUTIVE SUMMARY

The present report examines the promotion and development of regional tourism within BRICS countries, Brazil, China, Egypt, Ethiopia, India, Indonesia, Iran, Russia, Saudi Arabia, South Africa, United Arab Emirates (UAE).

Specifically, its objectives are:

- To analyze the principal axes of action of the national tourism plans of BRICS countries, especially about the development of regional tourism;
- To identify marketing campaigns and branding initiatives in the promotion of memorable local experiences, aiming at the enhancement of cultural and natural heritage;
- To analyze recent research on the domestic and international tourism market of BRICS countries and identify trends.

Six thematic axes have been identified for the research:

- 1 - Infrastructure;
- 2 - Diversification of the Tourism Offer;
- 3 - Professional Qualification;
- 4 - Public-Private Cooperation;
- 5 - Financing and Incentives for Tourism;
- 6 - Tourism Promotion.

The main recommendations related to each thematic axis are presented below.

1. INFRASTRUCTURE

The BRICS countries regard infrastructure investments as crucial to regional tourism development. These investments are primarily directed toward enhancing connectivity and improving access to tourist destinations; ensuring accessibility and safety for tourists; advancing sustainable tourism initiatives; modernizing destinations, services, and tourism products through the integration of technology and innovation; and, more recently, supporting community-based tourism destinations as a strategy to promote the social inclusion of rural and people, especially women, youth and people with disabilities, in vulnerable situations.

Recommendations

- Strengthen cooperation among BRICS members to share best practices, technologies, and investments in tourism infrastructure.
- Enhance connectivity among BRICS members through direct flights and stopover programs; rail networks integrating national and transnational destinations when feasible; and ports and waterways linking maritime and river tourism routes, fostering an efficient and multimodal transportation network.
- Modernize the transportation system, focusing on minimizing environmental impacts.
- Prioritize projects that promote environmental sustainability, focusing on waste management, natural resource conservation, biodiversity protection, and renewable energy utilization.
- Invest in innovation and technology in tourism, focusing on management, research, and data analysis; smart and sustainable infrastructure; promotion and commercialization; and integrating systems and sharing information among BRICS countries.
- Invest in developing community-based tourism destinations.

2. DIVERSIFICATION OF THE TOURISM OFFER

To mitigate tourism overload and the impacts of unbalanced tourism, the countries in the group should diversify travel options by fostering less conventional routes and promoting itineraries that support a more balanced economy.

Recommendations

- Develop a platform to showcase tourism offerings and the main hubs and airlines of BRICS while integrating member countries' best practices in technology, accessibility, and sustainability.
- Review planned actions by the group that have not yet been implemented, like the BRICS Business Travel Card.
- Reflect on access strategies between BRICS countries through visa facilitation programs
- Develop the qualification and training of human resources for tourism while diversifying the offerings.

3. PROFESSIONAL QUALIFICATION

Education for tourism is a key element in the development and progress of nations, as it creates numerous job opportunities in sectors directly or indirectly related to the industry. The tourism value chain offers opportunities for multifaceted development. It can contribute to poverty reduction and promote a balanced participation, particularly involving women, youth, and people in vulnerable situations.

Recommendations

- Incentive programs and government actions to facilitate the inclusion of young people in the tourism workforce. These initiatives may include financial aid, exchange opportunities, international cooperation, and joint training programs offered in a hybrid format (online and in person) among BRICS countries.
- Develop campaigns that promote the advantages of working in tourism, with a focus on young audiences and the dynamic and diverse range of roles across the sector.
- Foster dialogue and research among the educational sphere (professors and tourism researchers), the entrepreneurial sphere (hospitality companies, agencies, event organizers, and others), and the governmental sphere (official tourism and education agencies).

4. PUBLIC-PRIVATE COOPERATION

Public-private partnerships (PPPs) are collaboration agreements between the public and private sectors to manage services, construction projects, and other public interest initiatives. These partnerships offer significant benefits, including sharing risks and responsibilities in the design, financing, construction, operation, and maintenance of projects. In BRICS countries, such partnerships have been particularly prominent in the tourism sector, especially in areas like infrastructure, connectivity, promotion, and innovation, fostering the competitiveness of tourism destinations.

Recommendations

- Promote cooperation among BRICS countries to exchange best practices in public-private partnerships within the tourism sector and to develop joint projects.

- Establish public-private partnerships to implement technological solutions in various tourism areas, including management, planning, information, infrastructure, promotion, and commercialization.
- Invest in airport, port, and railway infrastructure through public-private partnerships, focusing on modernization and the sustainability of these facilities.
- Establish public-private partnerships with airlines to expand international and regional flights, focusing on strategic destinations.
- Develop joint marketing campaigns with governments and private companies, leveraging digital platforms to promote tourism destinations strategically.

5. FINANCING AND INCENTIVES FOR TOURISM

The BRICS countries have implemented various initiatives to boost the tourism sector, including reducing taxes and subsidies, particularly for small and medium-sized enterprises (SMEs); establishing tourism development funds to finance strategic projects; providing credit lines with reduced interest rates; and funding projects through public calls for proposals.

Recommendations

- Promote incentives such as tax reductions and subsidies for SMEs and innovative startups in the tourism sector, emphasizing projects that advance sustainability and social transformation.
- Develop tax incentive programs specifically tailored for enterprises in less developed regions.
- Contribute to establishment of tourism development funds to inject capital into strategic projects within the tourism sector. Offer credit lines with reduced interest rates through partnerships with financial institutions, including the BRICS New Development Bank, to support the modernization and expansion of tourism businesses.
- Launch public calls for proposals to finance tourism projects regularly, focusing on sustainability, accessibility, social inclusion, and tourism security.

6. TOURISM PROMOTION

Strengthening the image of the tourist destination for domestic and international and regional markets is one of the main pillars of a nation's tourism activity. Promotional actions should highlight natural and cultural treasures while providing visitors memorable experiences through strategic marketing efforts.

Recommendations

- Create joint promotional actions among countries to optimize resources and support emerging economies.
- Design destination brands and establish an identity for tourist locations.
- Promotion of familiarization tours for digital influencers, and media professionals among BRICS members.

1. INTRODUCTION

Tourism has gained more visibility on the BRICS agenda since the inception of the Tourism Working Group. The most recent highlight is the first BRICS Tourism Forum held in Moscow on June 20 and 21, 2024, attended by tourism ministers. As a result, the Kazan Declaration, the final document of the XVI BRICS Summit, emphasized in paragraph 99 the commitment of countries to:

further strengthening people-to-people connectivity, enhancing multistakeholder cooperation, and developing joint projects in the tourist sphere. We appreciate the adoption of the Roadmap for BRICS Tourism Cooperation, which aims to facilitate tourist exchanges, develop skills, promote sustainable tourism, and digitalize tourist services. (KAZAN DECLARATION, 2024)

Recognizing the importance of the joint and continuous effort to align with global trends, strengthen the sector's adaptability, and ensure that tourism becomes an increasingly inclusive and transformative force among the BRICS members, the XVII Summit, expected to be held in July 2025 in Brazil, in the city of Rio de Janeiro, inserts tourism as a strategic agenda.

During Brazil's pro tempore BRICS presidency, the theme "Strengthening Global South Cooperation for more Inclusive and Sustainable Governance" will guide discussions on tourism under three priority axes: **1. Digital and Inclusive Tourism — focusing on the segment of digital nomads; 2. Regenerative and Sustainable Tourism — strengthening tourism's resilience; 3. Collaborative Governance in Tourism — promoting Regional Tourism.** This report, therefore, refers to the third axis to broaden the debate on the development of regional tourism in the BRICS countries.

This document understands the development of regional tourism as a way of boosting the different regions of the countries, through actions in the areas of management, infrastructure, financing, diversification of the tourism offer and promotion of tourism, with the aim of reducing social and economic disparities and promoting social inclusion in the BRICS countries.

Brazil, China, Egypt, Ethiopia, India, Indonesia, Iran, Russia, Saudi Arabia, South Africa, and the United Arab Emirates have distinct tourism

planning and management structures adapted to their territorial realities, political-administrative divisions, and national development strategies. Given this, regional tourism is organized and promoted according to each nation's particularities.

In Brazil, the Ministry of Tourism, through the National Tourism Plan (2024-2027), prioritizes reducing regional and social inequalities, aiming to distribute tourism's benefits more equitably throughout the national territory. Thus, it strengthens decentralized management, allowing a more flexible and responsive approach to regional needs and opportunities.

Tourism management in a regionalized way in Brazil began in 2004, with the creation of the Brazilian Tourism Regionalization Program (BTRP), in force since then. Within the scope of the BTRP, tourist regions are defined as geographical spaces with similar and complementary characteristics and potentialities capable of being articulated and defining a delimited territory for tourism planning and management purposes. Tourist regions are defined by state tourism bodies and regional governance bodies, which involve government agencies, the private sector, and local communities. Tourist regions are identified on the Brazilian Tourism Map, a tool to guide investments in the industry and the production of public policies focused on the management, structuring, qualification, promotion, and support for the commercialization of Brazilian Tourism (Brasil, 2024).

The report then presents the BRICS countries' commonalities in relation to their efforts to develop regional tourism, providing relevant examples and cases.

2.OBJECTIVES

2.1 General Objectives

This report analyzes the promotion and development of regional tourism in BRICS countries.

2.2 Specific Objectives

- To analyze the principal axes of action of the national tourism plans of BRICS countries, especially about the development of regional tourism.

- To identify marketing campaigns and branding initiatives in the promotion of memorable local experiences, aiming at the enhancement of cultural and natural heritage.
- To analyze recent research on the domestic and international tourism market of BRICS countries and identify trends.

3. METHODOLOGY

This report was prepared through bibliographic and documentary research, using mainly official documents from BRICS countries and international tourism organizations. In addition, the official tourism bodies of the BRICS countries were consulted on the main topics that make up the report.

To conduct the research, we established six thematic axes:

- 1 - Infrastructure
- 2 - Diversification of the Tourism Offer
- 3 - Professional Qualification
- 4 - Public-Private Cooperation
- 5 - Financing and Incentives for Tourism
- 6 - Tourism Promotion

To understand and analyze the thematic axes, four guiding questions were elaborated:

1. Do the strategic actions outlined in the country's tourism planning contribute to the distribution of tourist flows, balancing the number of visitors and promoting destinations?

2. How do marketing campaigns and branding initiatives promote countries' natural and cultural heritage and memorable experiences for visitors?

3. Regarding multi-destination tourism, are there studies promoting implementing simplified travel procedures and itineraries among BRICS members?

4. Has the country recently studied traveler profiles and emerging tourism trends to inform strategic planning policies?

For the documentary research, each country's tourism planning documents were collected, and the official tourism websites were consulted (Table 1).

Table 1. Official documents and websites consulted

Country	Official Tourism Body	Official Tourism Document	Official website / Source of documents
Brazil	Ministry of Tourism	Plano Nacional de Turismo 2024-2027	https://www.gov.br/turismo https://www.gov.br/turismo/pt-br/acao-a-informacao/acoes-e-programas/planos/plano-nacional-do-turismo
China	Ministry of Culture and Tourism	14th Five-Year Plan for Tourism Development	https://www.mct.gov.cn https://en.ndrc.gov.cn/policies/
Egypt	Ministry of Tourism and Antiquities	National Strategy for Sustainable Tourism 2030	https://www.experienceegypt.eg/en https://beta.sis.gov.eg/en/media-center/strategies/national-strategy-for-sustainable-tourism-2030/
Ethiopia	Ministry of Tourism	Sustainable Tourism Master Plan (2015-2025)	https://repository.uneca.org/handle/10855/23486
India	Ministry of Tourism	Swadesh Darshan 2.0 Scheme Guideline: Developing Sustainable and Responsible Destinations	https://tourism.gov.in https://tourism.gov.in/sites/default/files/2023-04/Swadesh%20Darshan%20%20Guideline%20Booklet.pdf
Indonesia	Ministry of Tourism and Creative Economy	Document not found	https://kemenpar.go.id/en
Iran	Ministry of Cultural Heritage, Tourism and Handicrafts	Document not found	https://www.tourism.gov.ir/
Russia	Federal Tourism Agency	Tourism Development Strategy of the Government of the Russian Federation (2035)	https://en.economy.gov.ru/ https://www.economy.gov.ru/material/file/fb8a4b084460e064e787d6f199dba82e/strategiya_razvitiya_turizma.pdf

			https://en.economy.gov.ru/material/news/tourism_development_strategy_until_2035_was_approved.html
Saudi Arabia	Ministry of Tourism	Document not found	https://www.mt.gov.sa/
South Africa	Department of Tourism	Department of Tourism Annual Performance Plan 2024-2025 Tourism Sector Master Plan National Tourism Sector Strategy	https://www.tourism.gov.za https://www.tourism.gov.za/ResourceCentre/Pages/StrategicDocuments.aspx
United Arab Emirates	Ministry of Economy	UAE Tourism Strategy 2031	https://u.ae/en/about-the-uae/strategies-initiatives-and-awards/strategies-plans-and-visions/tourism/uae-tourism-strategy-203

Source: Research data (2025).

This research approach allowed a broad vision of the axes drawn, an understanding of the strategies adopted by each member country, and the identification of trends, providing subsidies for the formulation of recommendations and guidelines to the group of BRICS member countries.

4. DISCUSSION AND ANALYSIS OF RESULTS

4.1 Infrastructure

The official tourism bodies of the BRICS countries recognize infrastructure investments as a strategic action for regional tourism development. In the official tourism planning documents of each country, infrastructure actions aimed at:

- The expansion of connectivity, covering air, land, water and rail modes;
- Improving accessibility and tourist safety;
- The implementation of tourism projects with a focus on sustainability;
- The modernization, technology, and innovation of tourist destinations, services, and products;
- Support for community tourism destinations as a form of social inclusion of rural and vulnerable communities.

Expanding **air, land, maritime, and rail connectivity** and improving access to destinations are fundamental to diversifying tourism supply and distributing flows, relieving pressure on consolidated destinations. Although connectivity issues fall outside the direct scope of the Ministry of Tourism, it is crucial to establish closer interministerial collaboration to achieve common goals and enhance the overall development of the tourism sector.

In countries with large territorial areas, like several BRICS countries, air connectivity is considered essential for developing tourism in more remote regions. Thus, significant investments are being made in airport construction, modernization, and expansion. In Russia, for example, 70 airports are currently being modernized. In Brazil, in 2025, the AmpliAR Program foresees investments in modernizing 100 regional airports, prioritizing the Legal Amazon region and part of the Northeast (Brasil, 2025). The 2025 budget foresees investments in airports and helipads in India to connect 120 new destinations, particularly in remote and underserved regions.

Rail transport is also essential for tourists in continental countries, where the journey is often a central part of the tourist experience. India, for example, has luxury trains and several high-speed trains that connect new and lesser-known destinations. In maritime tourism, India has identified 30 possible tourist routes along inland waterways for development by 2047. China's 14th Five-Year Tourism Development Plan intends to build tourist waterways to develop inland cruise tourism in the Yangtze River Basin and other rivers. The Russian project "5 seas and the Baikal lake" aims at integrated development of seaside resorts in 9 regions of the country.

In addition to investments in the construction and modernization of transport infrastructure, the BRICS countries are also concerned about reducing the transport sector's environmental impacts and dependence on fossil fuels, in line with the fight against climate change. In this context, countries have been investing in electric trains, subways, and buses, the use of biofuels and renewable energies, and non-motorized transport.

Accessibility and tourist safety are points of attention for countries to make destinations more balanced, welcoming, and safe. In this perspective, there are actions aimed at the adaptation of infrastructures and services for people with disabilities and reduced mobility; use of assistive technology, with applications and digital platforms that facilitate communication; qualifying services to assist visitors with specific needs; universal signage; and availability of information for tourists in different languages. In terms of tourist security, actions focus on strengthening

public safety, crisis management plans, and tourist information centers by providing guidelines on safety.

Investment in **tourism projects focusing on sustainability** and coping with climate change aims to encourage tourism enterprises to use renewable energy, manage waste, clean public spaces, and conserve natural resources and biodiversity. In this context, the dissemination and awarding of best practices and the certification of sustainable destinations are also carried out as an incentive. In Russia, for example, modular hotels are being implemented with modern, high-quality technologies, eliminating the need for heavy infrastructure and increasing the number of affordable hotels, especially for the ecotourism segment.

The **modernization, technology, and innovation of tourism destinations, services, and products** are the target of investments in the tourism infrastructure of the BRICS countries, aimed at improving the tourist experience and optimizing the public and private management of the sector. There are many initiatives in this area, such as digital platforms with real-time tourist information about attractions, events, transport, and others; use of virtual and augmented reality technologies in tourist attractions and museums; innovative city projects with public Wi-Fi and efficient transportation system; environmental monitoring systems, with sensors and drones in preserved areas; digital purchase and payment that facilitate transactions for tourists, among others. China, for example, seeks to accelerate the application and diffusion of new technologies in the tourism sector, such as Big Data, Cloud Computing, Internet of Things (IoT), Blockchain, 5G, Beidou system, Virtual Reality (VR) and Augmented Reality (AR), raising the level of development of the sector through scientific and technological innovation (China, 2021).

More recently, BRICS countries have shown interest in supporting **community tourism** as a social inclusion for rural and vulnerable communities. Segments of ethnotourism and rural tourism involving local communities are considered an essential strategy for valuing the cultural diversity of countries, revealing the richness of traditional cultures, and involving family agricultural production, crafts, dance, music, and gastronomy. Thus, investments occur in projects that seek to support the offer of lodging and food and the structuring of destinations that involve management by the local community. These initiatives aim to improve living conditions, empower the local community, and contribute to a more balanced participation of women, young people, and older people in the tourism production chain.

Community tourism is in line with the Global Code of Ethics for Tourism ([UN Tourism, 1999](#)), which argues that tourism activities should be

conducted in harmony with the attributes and traditions of the host regions and countries and respect of their laws, practices and customs.

India actively participates in [UN Tourism's Best Tourism Villages initiative](#), demonstrating its commitment to sustainability and preserving culture and traditions. In addition, it actively promotes stays in rural homestays to boost local economies and enhance cultural experiences.

In Brazil, the Ministry of Tourism has invested in programs [aimed at community-based tourism](#), promoting itineraries that protect and value the culture and ways of life of indigenous peoples and traditional communities. The initiatives strengthen local economies and favor environmental conservation, creating a sustainable alternative for development in regions of ecological and cultural importance.

From 2020 to 2024, South Africa invested in twenty-two community-based tourism projects, particularly lodging facilities, located in different parts of the country (South Africa, 2024).

In addition to aviation, the Etihad Rail project, a 1,200 km railway network, is enhancing inter-emirate connectivity, linking all seven emirates to key logistics hubs, Saudi Arabia, and Oman. This project is expected to improve domestic and regional tourism while reducing road congestion and freight costs. Furthermore, Khalifa Port's expansion is transforming Abu Dhabi into a leading cruise tourism hub, with an expected annual passenger capacity of 500,000.

4.2 Diversification of the Tourism Offer

Expanding, innovating, integrating, diversifying, and decongesting tourism: these words have become increasingly prevalent in discussions surrounding the management and mitigation of the detrimental effects of the excessive exploration of tourist destinations (unbalanced tourism). The diversification of tourism offerings is critical to the sustainability of destinations and the equitable distribution of benefits. This diversification includes promoting travel during off-peak seasons, exploring less conventional routes, and visiting areas (both rural and surrounding) of crowded tourist hotspots. Such measures allow tourists to discover new landscapes, cultures, and experiences.

Analyzing the main tourist segments and destinations highlighted in each BRICS country is pertinent to achieving this. Generally, the segments of sun and beach, cultural/historic, and nature/adventure remain among the most sought-after destinations, albeit with slight variations in each nation:

- **Brazil: Sun and beach** destinations such as Rio de Janeiro and the Northeast region stand out, along with ecotourism and nature destinations like the Amazon, Foz do Iguaçu, and Pantanal. The **Integrated Amazon Routes** represent an alternative to diversify tourist activities, thereby strengthening the Amazon region in the international market. Following the COVID-19 pandemic, there has been a growing interest in **nature and outdoor tourism** segments, consolidating locations such as national parks and rural communities in the countryside (Brazil, 2024). A notable highlight is the "Experiences of Rural Brazil" program, which aims to boost products and services related to family agriculture associated with tourism. This initiative seeks to promote innovative experiences for visitors. Additionally, **Afro Tourism and traditional peoples** continue to gain visibility in the country's tourism scene. The **Business and Events segment** has also gained prominence, with significant investments in infrastructure in cities such as Brasília and Belém.
- **Russia:** Cultural and urban tourism are the most sought-after. Moscow and Saint Petersburg are renowned for their rich historical heritage and museums. The segments of nature and adventure tourism have been gaining popularity as foreigners explore the Trans-Siberian Railroad and embark on trips to seaside spots and Lake Baikal. Russia has also promoted domestic tourism and Russian cuisine in the post-pandemic era, introducing new visitors to destinations such as Altai, Kamchatka and Caucasus mountains. The diversification of tourism offerings is also evident in developing tourist routes that promote comfortable access and logistics, and adaptation of some of them to the needs of foreign visitors (Russia, 2024).
- **India:** The cultural and spiritual segment is key in India, with the Taj Mahal (Agra), sacred cities (Varanasi), and the tourist route of Rajasthan attracting millions. Known as Wellness Travel, these offerings include longevity and holistic health, rest, disconnection, and innovations such as rejuvenating retreats and spiritual circuits. The development of technological resources has allowed virtual access to religious ceremonies, making the spiritual heritage of India more accessible to the public. Nature tourism is also growing, with wildlife national parks, such as tiger reserves, gaining notoriety. Since 2020, the Indian domestic market has boosted mountain destinations like the Himalayas and coastal destinations like Goa and Kerala as the country invests in improving infrastructure to accommodate this demand (India, 2023).
- **China:** Beyond iconic cultural landmarks such as the Great Wall, the Forbidden City in Beijing, and the Terracotta Army in Xi'an, China has increasingly focused on promoting natural destinations and less densely tourist areas. This include western Chinese provinces, such as Tibet and Sichuan, rural tourism, ecotourism, and smart tourism experiences in places like Zhangjiajie and Guilin. For national and international tourists, premium tourist routes are being developed, including national itineraries for snow and ice tourism, gastronomic

tourism routes, and scenic routes such as "The Four Seasons of Rural Beauty." These efforts aim to diversify tourism options, particularly **domestic tourism**, and promote even small historical cities. The **Business and Events** sector thrives in major centers like Shanghai and Guangzhou. However, these events have been reimagined as hybrid events during the pandemic (China, 2024).

- **South Africa:** Renowned globally for its **safaris and nature tourism**, particularly in Kruger National Park, and its stunning landscapes in Cape Town and along the Garden Route, the country excels in **Business and Events** tourism in cities such as Johannesburg and Cape Town. In the post-pandemic era, with a growing preference for outdoor activities, **ecotourism** and **community-based** tourism destinations have gained even more visibility, including tourism in townships and winery routes (South Africa, 2024).
- **Egypt:** The historical and cultural attractions remain the flagship offerings of Egypt, with highlights in Cairo such as the Pyramids of Giza and the Egyptian Museum, as well as the temples and pharaonic tombs in Luxor and Aswan. These attractions are complemented by **leisure tourism** in Red Sea resorts in Sharm El Sheikh and Hurghada. Post-pandemic, Egypt experienced a rapid recovery in demand for its archaeological sites and invested in enhancements, including the opening of the New Museum of Cairo. Emerging segments now include **adventure tourism** in the desert and **ecological tourism** in oases and other protected areas (Egypt, 2024).
- **Ethiopia:** The country promotes itself as an exquisite destination for **cultural and historical tourism** in Africa, featuring notable sites such as the Rock-Hewn Churches of Lalibela, Axum, and Gondar. The natural segment is also highlighted with attractions like Simien Mountains National Park. **Gastronomic and coffee tours** cater to travelers seeking an emotional connection with local culture through the flavors of ancestral cuisine. In the post-pandemic era, Ethiopia has emphasized **cultural, community, and religious** tourism, spotlighting traditional festivals like Timkat and capitalizing on its image as the cradle of civilizations (Ethiopia, 2023).
- **Indonesia:** Renowned for its **sun and beach tourism** in Bali and other tropical islands, Indonesia also attracts visitors with its cultural tourism at sites like the temples of Borobudur and Prambanan in Java, as well as **ecotourism** in destinations such as Komodo and the forests of Sumatra. Bali quickly recovered with an influx of regional tourists in the post-pandemic era. There have been efforts to diversify tourist flows beyond Bali, promoting destinations like Lombok, Labuan Bajo, and ecotourism in Borneo. With hundreds of millions of trips within the country each year, Indonesian domestic tourism has become vital for maintaining the sector (Indonesia, 2024).
- **Saudi Arabia:** Traditionally centered on **religious tourism** in the sacred cities of Mecca and Medina, which attract millions of Muslims each year for Hajj and Umrah, the country is now investing heavily in new tourism segments. Projects such as Al-'Ula, known for its archaeological sites of the Nabateans, the futuristic city of NEOM, and resorts at the Red Sea, aim to promote Saudi Arabia as a destination for **cultural and luxurious tourism**.

The post-pandemic period saw a massive return of pilgrims, with record numbers in 2023, and a gradual beginning for international leisure tourism, facilitated by easier visa processes (Saudi Arabia, 2024).

- **United Arab Emirates: Cultural tourism** has flourished with landmarks like the Louvre Abu Dhabi, the Museum of the Future, and the Sharjah Biennial Art Exhibition, enhancing the UAE's reputation as a center for heritage and innovation. **Adventure tourism** is thriving, particularly in Ras Al Khaimah, home to the world's longest zipline and extensive hiking trails. **Sustainability** is also a priority, with Abu Dhabi's Green Mobility Strategy integrating cycling tracks and electric transport to reduce carbon emissions. Domestic tourism has been boosted by initiatives like the "**World's Coolest Winter**" campaign, increasing hotel occupancy and economic activity. Additionally, the UAE is strengthening **sports and medical tourism**, attracting international visitors for major **sporting events and specialized healthcare services**. Despite pandemic-related challenges, swift recovery efforts enabled Dubai to regain its position among the world's top travel destinations by 2023. (United Arab Emirates, 2024).
- **Iran:** Iranian tourism strongly emphasizes **cultural and religious** segments. Highlights include historical attractions such as Persepolis, Isfahan (Naqsh-e Jahan Square and its mosques), and Shiraz, which are related to ancient Persia and attract visitors interested in history and architecture. Simultaneously, Shiite religious tourism flows to sanctuaries in Mashhad and Qom, receiving pilgrims from Iraq, Pakistan, Bahrain, and other countries. Despite sanctions and economic challenges, Iran had been growing as an alternative destination before the pandemic. However, it faces obstacles like air connectivity and visa permissions for Western tourists. **Natural tourism**, including deserts and mountains like Damavand, is not yet widely explored internationally. This segment presents a potential for diversifying offerings, especially considering the post-pandemic trend of seeking less crowded places (Iran, 2023).

The overview demonstrates that each BRICS country has well-defined and consolidated tourism guiding segments. Additionally, it highlights the efforts and initiatives aimed at innovating and presenting new possibilities for travelers.

To diversify tourism flows and introduce appealing itineraries that differ from those already established in the country, the government and stakeholders should invest in basic **infrastructure** related to tourism access, support, and technology is also advised, considering digital transformation, changes in habits and consumption patterns, and travelers' expectations and preferences. To provide smart travel experiences incorporating immersive technologies such as virtual and augmented reality, allowing for new ways of interacting with destinations and tourism experiences even before the trip. It is essential to observe the changes in the labor market and the opportunities created by remote work and

seasonal activities involving temporary visas, as these could represent a beneficial niche to diversify the range of tourist destinations offered.

4.3 Professional Qualification

Researching professional qualifications in tourism is fundamental to the sector's development. According to World Travel & Tourism Council (WTTC) data, tourism accounted for 7.6% of global GDP in 2022, employing nearly 296 million people. In this regard, the need for continuous qualification and improvement of professionals already active in the tourism job market is evident, as is the need for training new professionals, particularly young people. According to the World Tourism Organization (UN Tourism), tourism can be a significant sector for youth employability, with young people representing 16% of the global population. The topic in question has been extensively examined in the [Youth and the 2030 Agenda for Sustainable Development](#) document. It reaffirms the need to think about training for tourism and its sub-sectors, focusing on attracting young people interested in developing their skills for the sector.

In this context, education for tourism is a relevant element for the development and progress of nations. The tourism value chain offers opportunities for multifaceted development, contributing to poverty reduction and playing a fundamental role in promoting a more balanced participation, particularly for women, young people, and vulnerable populations, especially in BRICS countries.

Therefore, continuous investment in education is essential as a key means to empower individuals, promote social and economic development, and build a sustainable and inclusive future for all.

A brief retrospective of studies conducted in 2024 within the scope of the G20 Tourism Working Group (TWG) under Brazil's presidency highlighted key findings in the “Report on Professional Qualification in the Tourism Sector”. The results indicated that programs such as “Profissionais do Futuro” and “Qualifique Mais” in Brazil and the “NASSCOM Future Skills” platform in India are essential tools for professional training in tourism and related sectors. Likewise, the studies carried out for the G20 TWG indicate coverage of courses offered in several areas, especially Events and Sustainability, with a predominance of in-person or hybrid formats.

Regarding incentives for professional training of people in vulnerable situations, most G20 members report having specific programs for these groups, including scholarships, wage subsidies for underrepresented students, inclusion programs for people with disabilities, transportation subsidies, and more. The participation of young people aged 16 to 25 in the

tourism job market was one of the key aspects discussed in the analysis of initiatives undertaken by G20 members, highlighting governmental actions that facilitate youth entry into tourism employment.

According to the [Global Education Forum \(2023\)](#), tourism is one of the leading employers of young people, with over 50% of its workforce being 25 years old or younger. Consequently, the G20 TWG report recommends training actions and strategies targeted at this age group, as well as financial incentives, exchange opportunities, international cooperation, and other initiatives.

Within the BRICS members, professional qualification stands out as one of the primary initiatives supporting tourism, emphasizing entrepreneurial education.

India emphasizes the need for professionals fluent in foreign languages with skills in hygiene and safety, as well as training programs that develop advanced competencies such as digital marketing, sustainable tourism, and customer service. Strategies to promote a more balanced participation of young people and women in the qualification process and in the planning and operation of tourism activities are also highlighted. Regarding entrepreneurship development, India underscores the Skill India Mission (SIM), which trains and promotes professionals with an entrepreneurial profile in the country.

Russia presents its professional training opportunities offered by the centers for training and human resource development in tourism, located in Saint Petersburg, Moscow, and Kazan, in order to significantly increase the number of highly qualified workers in the sector. Another notable initiative from the country is the recognition and awarding of projects that showcase best practices, fostering the exchange of tourism-related experiences, as well as promote the attractiveness of the profession.

Ethiopia, on the other hand, seeks to establish partnerships aimed at providing high-quality, practical tourism training, focusing on fast-track programs for leaders and employees. An approach that bridges the gap between training institutions and tourism employers, ensuring that skills supply meets market demand. To address this gap is crucial to the industry's development, as many tourism employers highlight a shortage of specialized labor, even in countries with multiple training programs, revealing a lack of dialogue between educational and business spheres.

The United Arab Emirates, in its Tourism Strategy 2031 plan, emphasizes that the availability of labor in the tourism sector does not meet the required demand. The country has created federal programs to enhance the competitiveness of human resources in the private sector and attract citizens to Dubai's tourism sector to address this gap. In this regard,

the contribution of tourism education institutions is fundamental, as academic and technical training must remain closely aligned with the job market. This collaboration is essential in developing skills and competencies that match business demands, thereby contributing to the growth of tourism in different countries.

Another critical factor identified by the United Arab Emirates is the need for a broader range of training options at different educational levels — higher education (universities, colleges), technical education (vocational schools, specialized tourism training platforms), and educational programs both domestically and internationally (exchange programs). Given that human resource shortages pose a challenge for most BRICS member states, joint training initiatives between countries may offer an encouraging alternative for future professionals, particularly young people seeking their first jobs and the opportunity to discover new countries and cultures.

To cater to the luxury travel market, the Luxury Hospitality Certification program provides advanced training in high-end customer service and premium guest experiences, strengthening the UAE's reputation as a premier luxury destination. . By integrating these training strategies, the UAE is addressing labor market challenges while fostering a sustainable, skilled workforce.

Furthermore, the UAE's strategic planning highlights the imperative of conducting communication campaigns targeting individuals interested in pursuing careers in tourism and related fields, with a particular emphasis on young people.

In South Africa skills development and training programmes target unemployed youth and graduates between the ages of 18 and 35 in all nine provinces. The programmes focus on food and beverage, food safety quality assurance, national youth chefs training, professional cookery, fast food, and wine services.

As human resource shortages remain a pressing issue for most BRICS countries, collaborative and joint training initiatives can motivate aspiring professionals, particularly those entering the workforce for the first time. The opportunity to experience different cultures and broaden horizons may be an additional incentive to attract talent to the tourism sector.

4.4 Public-Private Cooperation

Public-private partnerships (PPPs) in the tourism sector across BRICS countries have been primarily encouraged in **infrastructure, connectivity, promotion, and innovation.**

In Brazil, the [International Tourism Acceleration Program \(PATI\)](#), a public-private partnership with airlines and airports, aims to increase the number of seats and international flights. Embratur, the Ministry of Tourism, and the Ministry of Ports and Airports implement the program. By 2025, at least 260,000 new seats will be secured for the country's northeastern region.

To enhance the tourist experience, China has implemented measures to optimize payment services, such as accepting foreign credit cards and expanding mobile payment options. A notable example is the **National Foreign Cultural Trade Base** in Guangzhou, which connects more than 400 local financial institutions to provide services such as accessibility to international card payments and the introduction of multilingual tourist information map systems. These initiatives aim to expand tourism reception capacity, ensuring a more pleasant experience for foreign visitors. Furthermore, the Chinese government encourages businesses to adopt favorable financial policies to stimulate tourism consumption. These policies include issuing discount vouchers through payment platforms and gas stations, fostering greater engagement and tourist spending.

In South Africa (2024), public-private partnerships are promoted to develop tourist destinations, improve connectivity, and modernize tourism facilities.

For the United Arab Emirates public-private partnerships (PPPs) in the UAE have played a fundamental role in advancing tourism growth, digital marketing, and infrastructure development. One of the most impactful collaborations is the Dubai Tourism & Google Partnership, which leverages artificial intelligence, search engine optimization, and digital storytelling to enhance Dubai's online presence. This initiative has significantly increased tourist engagement, strengthening Dubai's visibility as a leading global destination. Another notable partnership is the Sharjah Tourism and Air Arabia Initiative, which has improved international accessibility to Sharjah through direct flight promotions and travel packages. Similarly, Expo 2020 and Emirates Airlines formed a strategic collaboration offering special flight packages, discounted event tickets, and promotional deals, leading to record-breaking international arrivals during the Expo. In the luxury tourism segment, the UAE has established partnerships between high-end travel operators and private aviation companies, further strengthening its appeal among affluent travelers.

4.5 Financing and Incentives for Tourism

The governments of BRICS countries seek to stimulate the tourism sector through several initiatives, such as:

- **Tax reductions and subsidies** for tourism businesses, with a focus on small and medium-sized enterprises (SMEs) and innovative startups in the sector.
- The establishment of a **Tourism Development Fund** to inject capital into strategic tourism projects and ventures.
- The provision of **low-interest credit lines**, in partnership with financial institutions, to support businesses in the tourism sector.
- **Funding** for projects through public grant programs, mainly aimed at promoting sustainable tourism development.

These measures, generally permanent and designed to boost the tourism economy, were intensified during and after the COVID-19 pandemic to accelerate the sector's recovery. The dynamism of domestic and international tourism played a crucial role in this process. However, much of the success can also be attributed to expanded financing policies and tax exemptions, especially during the most critical period of the crisis.

One notable example of incentive policies is the Russian government's initiative, which offers regional subsidies to entrepreneurs interested in developing tourism-related projects. This financial support can be used for various purposes, from organizing tourist routes to developing mobile applications focused on tourism. The main objective of this mechanism is to foster local entrepreneurship, enabling new businesses to emerge and allowing regions to enhance their tourism products and services.

Additionally, the Russian government grants Value-Added Tax (VAT) exemptions for tourism operators engaged in domestic tourism, as well as for hotels and other tourism-related facilities. This measure aims to reduce operational costs for these businesses, stimulate sector growth, and make tourism services more accessible and competitive.

Ethiopia recognizes that financing is a key factor in encouraging tourism enterprises. For this reason, it is implementing a Tourism Development Fund and offering tax incentives.

South Africa has a number of initiatives that are implemented as partnerships between the Department of Tourism and government entities that offer financial support to qualifying private sector actors. Examples of the initiatives under the Tourism Incentive Programme include:

- **Market Access Support Programme** which offers partial financial support to qualifying small tourism enterprises to participate and exhibit at selected tourism marketing platforms;
- **Tourism Grading Support programme** which offers discounts of up to 90% on grading assessment fees for accommodation and meeting venues that apply for star grading by the Tourism Grading Council of South Africa;
- **Green Tourism Incentive Programme** which offers partial grant funding support on the cost of retrofitting tourism facilities with energy and water efficiency equipment and systems;
- **Tourism Transformation Fund** which offers a combination of debt finance and grant funding for smaller new and expansion tourism development projects with majority black shareholding;
- **Tourism Equity Fund** is a new programme that was established to promote growth and to address the funding challenges in the tourism sector and to stimulate job creation in the sector. Applicants must have a minimum of 30% black-ownership or achieve a minimum of 30% black-ownership through the transaction prior to funding being disbursed.

4.6 Tourism Promotion

Innovation and monitoring of marketing strategies for tourist destinations are crucial, as they enhance promotion efforts to strengthen the destination's image in both domestic and international markets. Promotional activities should highlight the destination's natural and cultural richness while creating opportunities for visitors to have memorable experiences. From this perspective, promotional tourism actions enable destinations to communicate their products and services effectively.

The majority of BRICS countries outline key actions in their official documents (national plans or reference documents) as follows: a) Participation in and organization of national and international fairs; b) Creation of digital tools, such as platforms to host services, companies, tourist guides, itineraries, and other resources that tourists may be interested in; c) Establishment of marketing offices in other countries; d) Formation of partnerships with key stakeholders; e) Development of a national brand.

Considering international tourism's marketing and strategic assumptions, creating a destination brand and unique identity for tourist sites is deemed a relevant promotional strategy for BRICS countries. A **national brand** is crucial to differentiate a country in the global market for products and services. The primary objective is to convey messages to

consumers that make the brand essential to identifying, recognizing, and appraising a product with added value (Pérez-Nebra & Rosa, 2008).

Conceptually, a national brand evokes values, qualities, and emotions in the consumer's mind regarding the country's products and services. In this regard, BRICS countries must develop a national brand that focuses on tourism development and reduces geographical distances, particularly in the tourism sector. Notably, the Brasil brand, created in 2005, and the new Discover Russia brand, launched in 2023, already well-represented at international tourism fairs, illustrate successful examples of national branding.

In the tourism sector, **digital platforms**, being informative and interactive, offer inclusive and intangible services that differentiate them as distribution channels and alternative media for promotion. These platforms facilitate disseminating information and services and enhance the traveler's experience. Most BRICS countries consider digital platforms valuable for promoting tourism and integrating technology and accessibility into the tourism offering.

Integrating marketing campaigns with the **national plans for tourism** of BRICS countries is an important tool for aligning tourist activities. It connects the objectives and areas of work defined in national policies. This approach ensures that domestic and international audiences embrace strategic guidelines for promoting tourism.

According to the current [Brazilian National Plan for Tourism](#) from 2024 to 2027, the overarching objective is "to position Brazil as the leading destination for visitors in South America by 2027. This strategic goal aims to transform tourism into a catalyst for sustainable development and a source of employment and income". In Brazil, tourist regions serve as a framework for planning and managing tourism activities. Consequently, marketing campaigns must be aligned with the historical, cultural, and economic identities of the cities (administrative areas), thereby crafting the image of a regional destination.

In their official documents, including those unrelated to marketing plans, BRICS countries outline actions and strategies that present opportunities to promote and commercialize destinations.

Brazil has the [Aquarela Plan](#), which, in its most recent edition of 2020, published by [Embratur](#)— the Brazilian state tourist board responsible for promoting tourism abroad — establishes strategies, goals, and international marketing objectives for Brazilian tourism. Embratur is currently developing a new **marketing plan** that will outline the Brazilian promotion strategy for 2024 to 2026, taking into consideration analyses of the demand for foreign travelers and benchmarking.

India has the [Swadesh Darshan 2.0 Scheme Guidelines](#), which determines the following areas for tourism promotion:

- Detailed Benchmarking and analyses of aspects of the destination and,
- Promotion and Marketing of destinations.

Indian initiatives used to promote tourism are aligned to priority areas as defined in the [Goa Guide](#):

- Green tourism;
- Digitalization;
- Skills;
- Tourism micro-, small and medium-sized enterprises (MSMEs);
- Destination management.

Additionally, **promotion campaigns and strategic collaborations** such as "Chalo India," "Wedding in India," and "Dekho Apna Desh" are noteworthy, as they actively enhance both domestic and international tourism. These initiatives promote cultural trips and experiences and familiarization (FAM) tours for influencers, travel opinion makers, and media professionals. Furthermore, the Incredible India Digital Platform (IIDP) provides a digital interface for exploring and experiencing travel throughout India.

The UAE has executed some of the world's most successful tourism marketing campaigns done through all local tourism authorities, strategically positioning itself as a premier global destination. The "Visit Dubai" global campaign has been instrumental in increasing international tourist arrivals through targeted digital marketing, influencer collaborations, and large-scale media outreach in over 20 key markets. This campaign has reinforced Dubai's brand identity as a hub for luxury, business, and family-friendly travel.

Beyond Dubai, the UAE has strengthened its presence at global tourism expos such as the World Travel Market (WTM) and ITB Berlin, leading to increased business-to-business (B2B) partnerships and tourism investments. The introduction of the Golden Visa for Tourism Entrepreneurs has further contributed to long-term tourism growth by attracting high-net-worth investors and business leaders to establish tourism-related enterprises in the country.

In addition, the UAE has actively developed maritime tourism through the Maritime & Cruise Tourism Campaign, which has expanded port infrastructure and enhanced local excursion offerings, positioning Dubai and Abu Dhabi as top-tier cruise destinations.

Some countries face challenges raising funds for campaigns and actions in tourism marketing. Ethiopia has proposed an alternative by creating a Tourism Development Fund to support promotion and commercialization efforts. This approach can be realized through public and private partnerships, particularly with companies with a multilateral outlook, such as airlines, international tourism agencies, and large hotel chains.

Finally, **promotion campaigns** and **strategic collaborations** enhance the commercialization of tourism in BRICS countries, focusing on adventure, rural, wellness, business and events, leisure, and experience segments. These efforts promote travel that seeks to value cultural heritage and advance sustainable development goals.

5. CONNECTIVITY AND TOURISM EXPANSION IN BRICS COUNTRIES

Over the past five years, the tourism sector has undergone profound transformations due to unexpected events, global challenges, and the resilience of markets and travelers. The impact of the COVID-19 pandemic has redefined travel patterns, forced governments to rethink policies, and driven structural changes in how tourists explore the world. The recovery, in turn, has introduced new behaviors, opportunities, and challenges that are still being understood.

5.1 The Recovery of International Tourism Post-COVID-19

Due to the crisis caused by the COVID-19 pandemic, BRICS countries collectively lost approximately 77% of their international tourism flow in 2020 compared to the previous year. Table 2 illustrates the magnitude of the pandemic's impact on tourism flows, with profound socioeconomic effects, given the importance of tourism in various economies.

In summary, 2020 and 2021 marked a period of historic decline, during which domestic tourism, in many cases, became the only means of sustaining economic activities related to the sector.

Table 2. Arrival of International Tourists in BRICS Countries, from 2019 to 2024 (in millions of visitors).

Country	2019	2020	2021	2022	2023	2024	% (2024/2019)
Brazil	6,35	2,15	0,75	3,63	5,91	<u>6,77</u>	6,6%
China	31,88	-	-	-	13,78	26,94	-15,5%
Egypt	12,88	3,62	7,97	11,66	14,91	<u>15,80</u>	22,7%
Ethiopia	0,81	0,27	0,52	0,84	1,08	1,30	60,5%
India	17,91	6,34	7,01	14,33	8,38	<u>9,66</u>	-46,1%
Indonesia	15,46	3,92	1,55	4,91	11,56	<u>13,74</u>	-11,1%
Iran	9,11	1,55	0,99	4,11	5,87	7,50	-17,7%
Russian Federation	24,4	6,36	7,08	8,24	8,21	9,05	-62,9%
Saudi Arabia	17,53	4,14	3,48	16,64	27,42	<u>30,00</u>	71,1%
South Africa	10,23	2,80	2,26	5,70	8,48	<u>8,92</u>	-12,8%
U. Arab Emirates	21,56	7,17	11,48	22,65	28,15	<u>29,2</u>	35,4%
Total BRICS	168,12	38,32	43,09	92,71	133,75	158,88	-5,5%

Source: National statistics provided by BRICS countries (2025) and UN Tourism (2024).

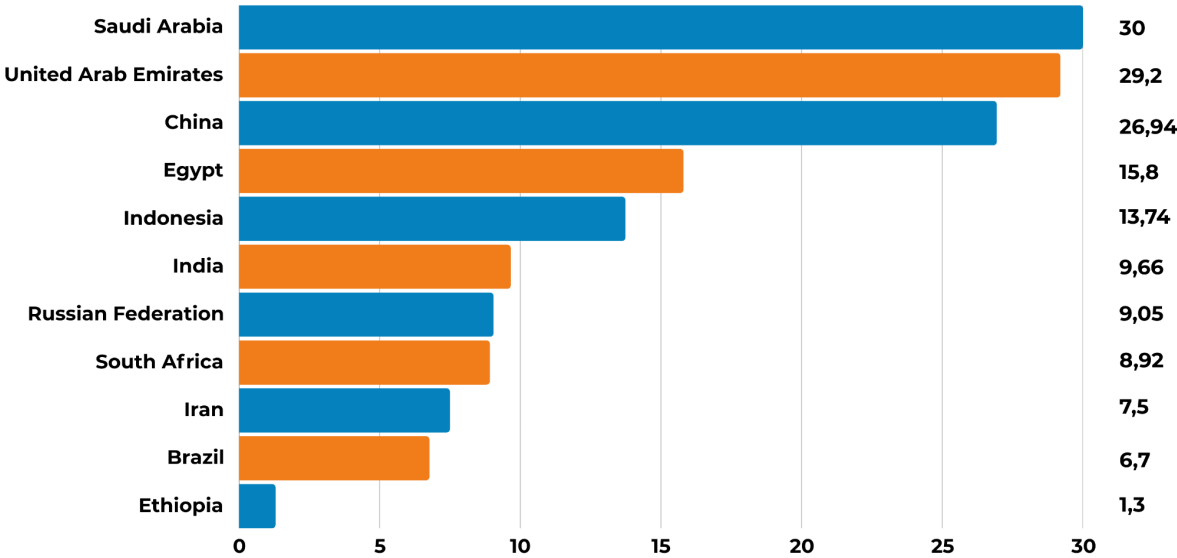
After gradual growth in 2021, 2022, and 2023, international tourism flows steadily recovered in 2024. The most significant increases were recorded in Saudi Arabia (71.1%), Ethiopia (60.5%), the United Arab Emirates (35.4%), Egypt (22.7%), and Brazil (6.6%), which surpassed their 2019 levels.

The factors driving the recovery of international tourism varied across countries. In general, contributing factors included easing health restrictions, resumption of international flights (often with government support for airlines), and targeted tourism promotion campaigns aimed at revitalizing destination appeal. Countries that effectively communicated safety measures and had captive source markets (such as neighboring regions) recovered more quickly.

On the other hand, several countries, including Russia (-62.9%), India (-46.1%), Iran (-17.7%), China (-15.5%), South Africa (-12.8%) and Indonesia (-11.1%), continue to work toward restoring their tourism flows to pre-pandemic levels as of 2024.

In 2024, the countries that stood out as the main receiving hubs among the BRICS countries were Saudi Arabia, the United Arab Emirates, China, Russia and Egypt (Figure 1).

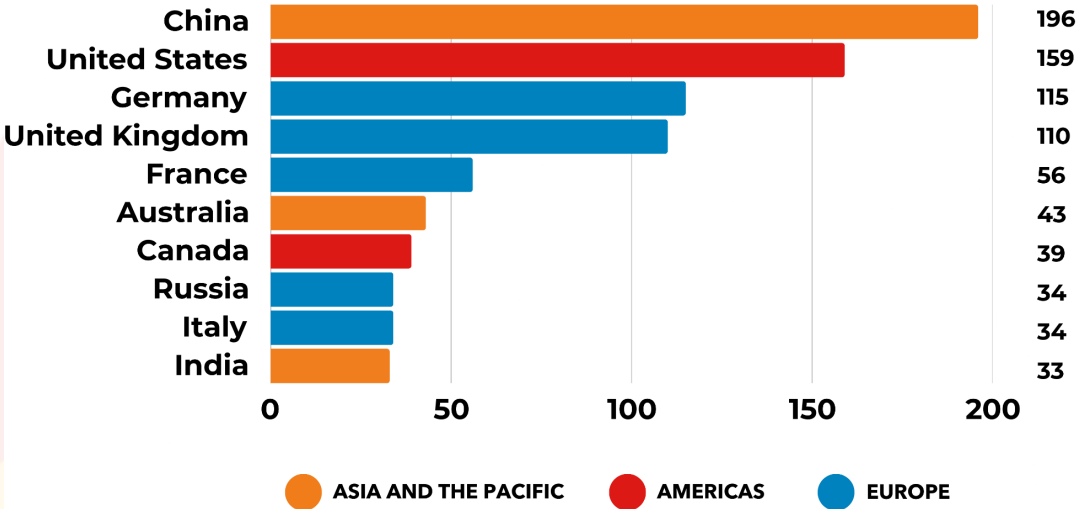
Figure 1. Arrival of International Tourists in BRICS Countries in 2024 (in millions of visitors)



Source: National statistics of BRICS countries (2025).UN Tourism (2024)

China, Russia, and India are among the top 10 countries worldwide in terms of outbound tourism spending. According to UN Tourism (2024), China was the world's largest spender on international travel in 2023, with \$196 billion, ahead of the United States (\$150 billion), Germany (\$112 billion), and the United Kingdom (\$110 billion). Russia ranked 8th (\$34 billion). At the same time, India—now the world's most populous country—rose from 14th to 10th place, highlighting the growing importance of the Indian outbound tourism market (Figure 2).

Figure 2. World's Top 10 Tourism Spenders – International Tourism Expenditure (US\$ billions, 2023).



Source: UN Tourism (2024).

In this context, improving connectivity between BRICS countries is crucial, given the still largely untapped potential for tourism flows within the bloc. Together, these countries have a combined population of approximately 4 billion people, with particularly large populations in India (1.438 billion), China (1.411 billion), Indonesia (281.2 million), Brazil (203.1 million), and Russia (146 million). These countries have been experiencing significant socioeconomic growth, increasing their population’s purchasing power and enabling greater spending on leisure and travel, both domestically and internationally.

5.2 Main Source Markets and Connectivity Among BRICS Countries

The leading international tourist source markets for each BRICS country largely reflect geographical, cultural, and economic factors. Table 3 summarizes the top three countries of origin for tourists visiting each of the 11 BRICS members based on WTTC (2024) data for 2023.

A strong presence of neighboring and regionally close countries as primary source markets is observed—for example, Argentina and Paraguay for Brazil; Zimbabwe, Mozambique, and Lesotho for South Africa; Malaysia and Singapore for Indonesia; Iraq, Turkey, and Azerbaijan for Iran, among others.

In some cases, long-haul leisure tourism and business travel also place countries such as the United States, the United Kingdom, and Germany among the top three source markets for Brazil, Egypt, Ethiopia, and India.

Table 3. Main Sources of Tourists to BRICS Countries in 2023

Destination (BRICS)	1st Source Market	2nd Source Market	3rd Source Market
Brazil	Argentina (27%)	United States (13%)	Paraguay (9%)
China*	Hong Kong, SAR China (51%)	Macau, SAR China (14%)	Myanmar (7%)
Egypt	Russian Federation (12%)	Saudi Arabia (11%)	Germany (8%)
Ethiopia	Nigeria (12%)	Sudan (9%)	United States (8%)
India	United States (10%)	Bangladesh (10%)	United Kingdom (7%)

Indonesia	Malaysia (25%)	Singapore (14%)	Australia (13%)
Iran	Iraq (37%)	Türkiye (11%)	Azerbaijan (7%)
Russian Federation**	Kazakhstan (27%)	Tajikistan (10%)	Uzbekistan (10%)
Saudi Arabia	Bahrain (12%)	Egypt (10%)	Pakistan (10%)
South Africa	Zimbabwe (24%)	Mozambique (16%)	Lesotho (14%)
United Arab Emirates	India (14%)	Russian Federation (7%)	Saudi Arabia (7%)

* Visitors travelling between China and Hong Kong SAR, China, or Macau SAR, China, or Taiwan, China are considered as 'international' visitors for the purpose of WTTC research.

** Data of the Russian Federation.

Source: WTTC (2024).

Regarding intra-BRICS tourism flows, as of 2024, only Egypt, Saudi Arabia, and the United Arab Emirates had other BRICS members among their top three source markets.

Egypt recorded a significant influx of tourists from Russia and Saudi Arabia (Egypt, 2024). Meanwhile, Saudi Arabia counted Egypt as one of its most important sources of international visitors, reflecting the dominance of religious tourism (Muslim pilgrimage) in its tourism statistics. India and Indonesia also contribute significant numbers of pilgrims to Mecca annually (Saudi Arabia, 2024). For the United Arab Emirates, India is the top source market, followed by Russia and Saudi Arabia, which are motivated by shopping and leisure tourism in Dubai/Abu Dhabi, luxury tourism, and business travel (United Arab Emirates, 2023).

Regarding air connectivity among BRICS member countries, Table 4 presents each country's airline hubs. In contrast, Table 5 highlights the routes of direct and connecting flights between BRICS members.

Table 4. Main Air Hubs and Airlines in BRICS Countries

BRICS	Airport	Airline
Brazil	Guarulhos International Airport (GRU)	LATAM Airlines Brasil
	Brasília International Airport (BSB)	GOL Linhas Aéreas LATAM Airlines Brasil
	Viracopos International Airport (VCP)	Azul Linhas Aéreas Brasileiras
China	Beijing Capital International Airport (PEK)	Air China

	Shanghai Pudong International Airport (PVG)	China Eastern Airlines
	Guangzhou Baiyun International Airport (CAN)	China Southern Airlines
Egypt	Cairo International Airport (CAI)	EgyptAir
Ethiopia	Addis Ababa Bole International Airport (ADD)	Ethiopian Airlines
India	Indira Gandhi International Airport (DEL)	Air India, Vistara
	Chhatrapati Shivaji International Airport (BOM)	IndiGo, GoAir
Indonesia	Soekarno-Hatta International Airport (CGK)	Garuda Indonesia
Iran	Imam Khomeini International Airport (IKA)	Iran Air
Russian Federation	Sheremetyevo International Airport (SVO)	Aeroflot
	Domodedovo International Airport (DME)	S7 Airlines
Saudi Arabia	King Abdulaziz International Airport (JED)	Saudia
	King Khalid International Airport (RUH)	Saudia
South Africa	O.R. Tambo International Airport (JNB)	South African Airways
	Cape Town International Airport	-
United Arab Emirates	Dubai International Airport (DXB)	Emirates
	Abu Dhabi International Airport (AUH)	Etihad Airways
	Sharjah International Airport (SHJ)	Air Arabia

Source: National Civil Aviation Agency (Anac/Brazil) (2014); Intermodal Digital (2024).

Air hubs play a strategic role in improving and expanding connectivity between BRICS countries, serving as key points that facilitate the integration of air routes and the optimization of passenger flows. By concentrating on international and domestic connections, hubs enable travelers from different regions to access destinations within the bloc more efficiently, reducing travel times and operational costs. This dynamic is particularly relevant for countries with vast territorial extensions, such as Brazil, Russia, India, and China, where air connectivity is essential to overcoming geographical distances.

Table 4 reveals opportunities for implementing **stopover flight**¹ strategies among the bloc's countries. This strategy can attract and facilitate the movement of passengers interested in exploring new destinations and making the most of long journeys. Additionally, airports that offer stopovers stimulate the local economy by receiving more transit

¹ An intermediate stop on a connecting flight that allows the passenger to stay in the connecting city/destination for an extended period, usually at no additional cost to the ticket.

tourists who can experience new attractions, further encouraging return visits to the destination.

Table 5. Direct commercial flights between the countries that make up BRICS.

BRICS Country	Countries with Direct Flights	Airlines
Brazil	<ol style="list-style-type: none"> 1. Ethiopia 2. South Africa 3. United Arab Emirates 	LATAM Airlines Emirates
China	<ol style="list-style-type: none"> 1. Egypt 2. Ethiopia 3. India 4. Indonesia 5. Iran 6. Russia 7. Saudi Arabia 8. United Arab Emirates 	Air China Air India Cathay Pacific China Eastern Airlines China Southern Airlines South African Airways
Egypt	<ol style="list-style-type: none"> 1. India 2. South Africa 3. United Arab Emirates 	EgyptAir
Ethiopia	<ol style="list-style-type: none"> 1. Brazil 2. China 3. Egypt 4. India 5. Russia 6. Saudi Arabia 7. South Africa 8. United Arab Emirates 	Ethiopian Airlines
India	<ol style="list-style-type: none"> 1. China 2. Russia 3. United Arab Emirates 	Aeroflot Air India Air India Express
Indonesia	<ol style="list-style-type: none"> 1. China 2. Saudi Arabia 3. United Arab Emirates 	Garuda Indonesia
Iran	<ol style="list-style-type: none"> 1. China 2. Russia 3. United Arab Emirates 	Iran Air
Russia	<ol style="list-style-type: none"> 1. China 2. Egypt 3. Ethiopia 4. India 5. Indonesia 6. Iran 7. United Arab Emirates 	Aeroflot Ethiopian Airlines Mahan Air Emirates
Saudi Arabia	<ol style="list-style-type: none"> 1. China 2. India 3. Russia 	Saudia

South Africa	<ol style="list-style-type: none"> 1. Brazil 2. China 3. Egypt 4. Ethiopia 5. United Arab Emirates 	South African Airways Egypt Air Ethiopian Airlines Emirates
United Arab Emirates	<ol style="list-style-type: none"> 1. UAE has direct flights to all BRICS countries 	Emirates Airline , Etihad Airline , Air Arabia, Fly Dubai

Source: National information of BRICS countries (2025).

Air connectivity among BRICS countries remains limited, with only a few direct flight routes. The countries that stand out with the greatest connectivity are UAE, China, Ethiopia, Russia and South Africa, with direct flights to several BRICS countries. The remaining countries have connectivity, on average, with 2 to 3 BRICS countries.

Given the market's potential, this scenario highlights the importance of **regional integration, enhanced connectivity, and travel facilitation** to boost tourist flows among BRICS countries. Cooperation initiatives, such as bilateral visa agreements or joint promotion of multi-destination itineraries (when feasible), can further strengthen intra-bloc tourism. Additionally, adopting the BRICS Business Travel Card, currently under study, could ease mobility between member countries, reducing bureaucratic barriers and fostering a more dynamic flow of travelers for tourism and business or academic activities.

5.3 Travel Facilitation Among BRICS Countries

Given the importance of strengthening BRICS relations in the tourism sector, it is essential to facilitate travel among the member countries. One of the key lessons from the recovery of international tourism is that **reduced bureaucratic barriers** help restore tourism flows quickly and effectively. In this regard, as highlighted during the first BRICS Tourism Forum, held in Russia in 2024, the **mutual visa exemption** among BRICS countries emerges as a desirable medium-to-long-term goal. Concrete measures are underway; in the short term, governments are evaluating the expansion of **electronic visas (e-visa)**. India, for example, has broadened its e-visa program, facilitating entry for Chinese, South African, and Brazilian travelers (CNI, 2017). South Africa has instituted a trusted tour operator system that allows qualifying tour operators to obtain visas on behalf of their clients. This system is currently operating for tour groups from China and from India. Russia also launched e-visas for citizens of 64 countries, including 5 BRICS countries (China, India, Indonesia, Iran, Saudi Arabia).

Moreover, there were concluded visa-free agreements with China and Iran for mutual traveling tourist groups.

Additionally, existing bilateral visa exemption agreements can serve as models: Brazil and Russia have mutually abolished tourist visas since 2010, and Brazil and South Africa implemented reciprocal visa exemption in 2023. Similar initiatives should be negotiated to include the new BRICS members, encouraging intra-bloc tourism.

Another proposed initiative is the **BRICS Business Travel Card**, which the BRICS Business Council suggested in 2015. This card would operate similarly to the APEC Business Travel Card, streamlining business visa processes among member countries. The MICE (Meetings, Incentives, Conferences, and Exhibitions) sector could also benefit from this initiative. Although primarily aimed at the corporate segment, this tool has the potential to enhance mobility while strengthening tourism integration, business opportunities, and investment flows.

Travel facilitation measures and improvements in direct air connectivity are expected to reduce costs and bureaucracy, benefiting leisure and business tourism across the 11 BRICS members.

5.4 The Relevance of Domestic Tourism

As previously mentioned, the health crisis consolidated a significant trend: the **increased appreciation of domestic and regional tourism**. With restrictions on international travel, tourists began to explore destinations within their own countries or nearby regions, resulting in an unprecedented boom in domestic tourism.

China, a leading power in domestic tourism, recorded 5.6 billion domestic trips in 2024, marking a 14.8% increase compared to the previous year. In 2023, India registered a record of approximately 2.5 billion domestic trips, surpassing pre-pandemic levels (India, 2023).

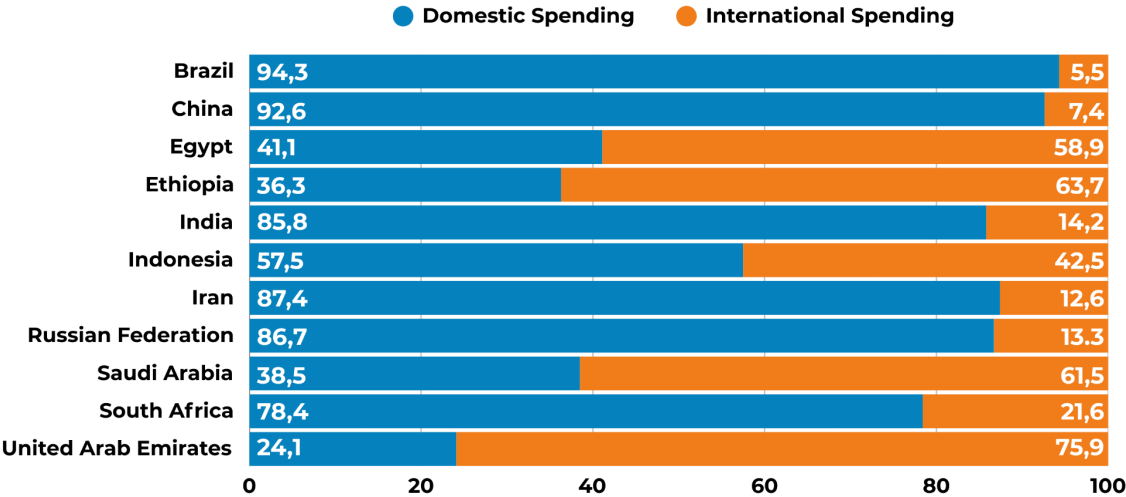
In Russia, domestic tourist trips reached 81.4 million in 2024, representing an 10% increase compared to 2023 (Russian Federation, 2024).

Brazil's domestic tourism market is undoubtedly its greatest asset; in 2023, around 91 million passengers were transported on domestic flights (Brasil, 2024). During the critical period, domestic tourism in Brazil was strengthened through public incentives and an increased appreciation of national destinations among Brazilian travelers (Brasil, 2024).

Similarly, in Saudi Arabia, there was a significant rise in domestic tourism during the pandemic, with millions of Saudis visiting national destinations—including deserts, historical sites such as Al-'Ula, and Red Sea beaches—driven by government-led promotional campaigns (Saudi Arabia, 2023).

Data from the WTTC (2024) regarding expenditures generated by domestic and international tourism in 2023 further underscore the importance of the domestic market for BRICS members (Figure 3).

Figure 3. Percentage of domestic and international tourism spending (2023)



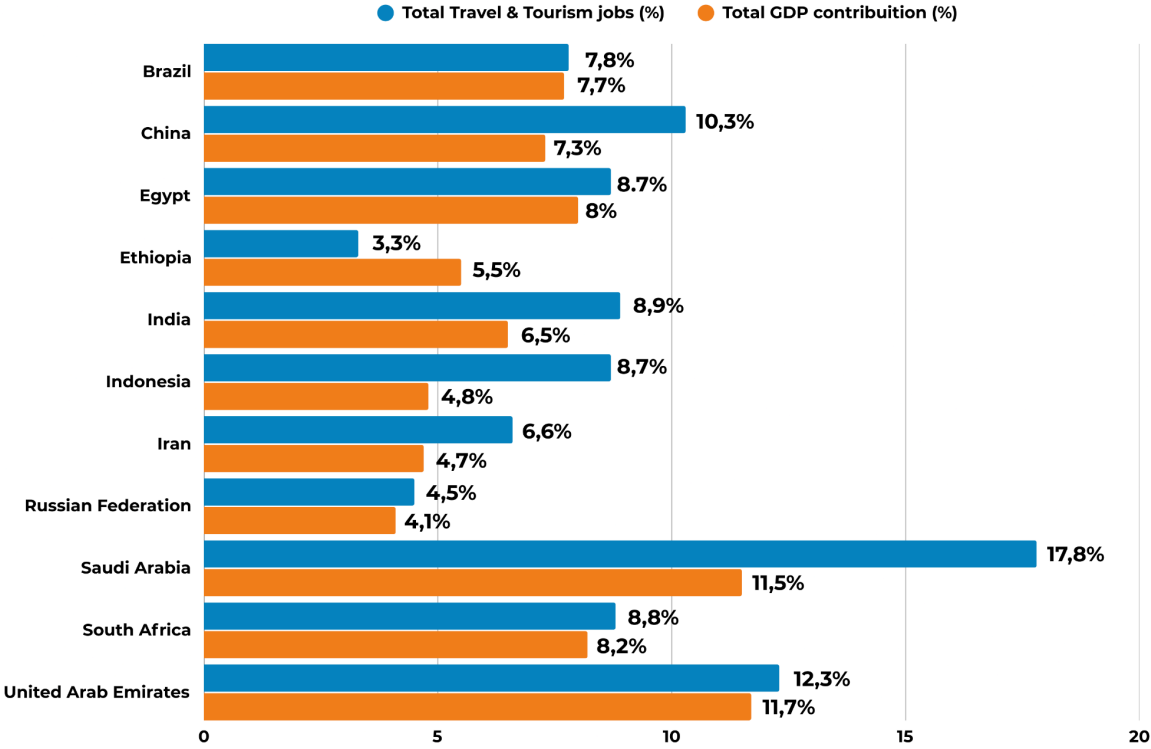
Source: WTTC (2024).

It can be observed that in countries such as Brazil (94.3%), China (92.6%), Iran (87.4%), Russia (86.7%), India (85.8%), and South Africa (78.4%), domestic tourism expenditures significantly outweigh those of international tourism. This difference indicates that the internal market is the primary driving force behind developing tourism activities in these countries. The predominance of domestic tourism underscores the need for policies and investments focused on strengthening tourism infrastructure and services across different regions to understand better, cater to, and promote internal demand.

Conversely, the United Arab Emirates (24.1%), Ethiopia (36.3%), Saudi Arabia (38.5%), and Egypt (41.1%) exhibit a lower percentage of expenditures from domestic tourism, making them more dependent on international visitor flows. Indonesia, in 2023, demonstrated the most balanced distribution between domestic (57.5%) and global (42.5%) tourism contributions.

Finally, Figure 4 presents the role of the tourism sector in the domestic economy and job creation across BRICS countries. Notably, the United Arab Emirates and Saudi Arabia stand out, where tourism represents 11.7% and 11.5% of GDP, respectively. Tourism generates a significant share of employment, accounting for 17.8% in Saudi Arabia and 12.3% in the UAE.

Figure 4. Percentage of Tourism's Contribution to the Gross Domestic Product and Labor Market in BRICS Countries (2023)



Source: WTTC (2024).

As observed, tourism plays a significant role in the GDP of BRICS countries, with potential for further growth given the dynamism of domestic and international tourism. A coordinated approach within the BRICS framework can play a key part in this process by promoting joint initiatives, facilitating tourism integration, and strengthening the global appeal of these countries as travel destinations. With well-structured strategies and appropriate investments, tourism has the potential to become an even more robust pillar for economic and social development across BRICS countries.

6. RECOMMENDATIONS AND FINAL CONSIDERATIONS

Six thematic axes were established to guide the research: Infrastructure, Diversification of the Tourism Offer, Professional Qualification, Public-Private Cooperation, Financing and Incentives for Tourism, and Tourism Promotion. Each pillar was analyzed to identify

challenges, opportunities, and recommendations to strengthen regional tourism.

In the **Infrastructure** axis, the importance of investments in connectivity, accessibility, tourism security, and sustainability was highlighted. It is recommended that cooperation among BRICS countries be expanded to share best practices and technologies in tourism infrastructure and prioritize projects that integrate modernization and environmental impact reduction. Investments in community-based tourism have also been identified as an essential strategy to promote the social inclusion of local and people in vulnerable situations. Additionally, expanding air connectivity through new direct flights between BRICS countries and promoting stopover programs to encourage tourists to visit multiple destinations in a single trip is advised.

Regarding the **diversification of the tourism offer**, the report highlights the key segments developed by BRICS countries and presents initiatives to expand the sector. To this end, creating a platform that promotes tourism offerings, best practices from each country, and the main hubs and airlines within BRICS is suggested, integrating technology, accessibility, and sustainability. Furthermore, it is recommended that planned actions that have not yet been implemented, such as the *BRICS Business Travel Card*, be resumed, and qualification and training programs for human resources in tourism should be developed.

Regarding **Professional Qualification**, it was observed that most BRICS countries consider it essential to invest in training human resources for tourism, especially by encouraging young people to enter the job market. Moreover, it is important to provide training opportunities for women and individuals in vulnerable situations to promote more equitable participation in tourism-related activities. It is recommended that government programs be created to integrate young people into the job market through government subsidies, international exchange opportunities, and cooperative training courses between BRICS countries, which could be conducted in hybrid formats (both in-person and remote). Awareness campaigns should also highlight the advantages of working in tourism. Strengthening dialogue between research and various sectors—such as academia (tourism professors and researchers), the business community (hotels, travel agencies, event organizers), and government institutions (tourism and education agencies)—is key to fostering better integration between academic knowledge, the job market, and public policies.

In the **Public-Private Cooperation** axis, partnerships between sectors were recognized as strategic for boosting tourism, particularly

infrastructure, connectivity, and innovation. It is recommended that best practices in public-private partnerships (PPPs) among BRICS countries be shared, in addition to investing in airport, port, and railway infrastructure, focusing on modernization and sustainability. Joint marketing campaigns between governments and businesses were also suggested to enhance the competitiveness of destinations.

The **Financing and Incentives for Tourism** axis was analyzed based on government initiatives, such as tax reductions, subsidies, and credit lines for small and medium-sized enterprises (SMEs). Tourism development funds should be allocated or enhanced to expand these efforts, and public calls for projects that finance sustainable and inclusive tourism initiatives should be initiated. Prioritizing investments in less developed regions was also highlighted as an essential measure to address regional inequalities.

Finally, regarding **Tourism Promotion**, the report outlines the priorities of BRICS countries in promoting tourism, highlighting existing documents, current strategies, and future planning. Based on the gathered information, it is recommended to plan joint promotional actions among BRICS countries to optimize resources and support emerging economies, establish destination branding initiatives, develop a platform that promotes tourism offerings and best practices, and integrate technology, accessibility, and sustainability. Additionally, organizing familiarization tours for influencers, travel opinion leaders, and media professionals among BRICS members is advised.

In summary, tourism represents a strategic opportunity for the economic and social development of BRICS countries. However, to fully achieve its potential, it is necessary to invest in infrastructure, diversify offerings, train professionals, strengthen public-private partnerships, foster sustainable initiatives, and promote destinations in an integrated and innovative manner. Cooperation among BRICS members is essential to overcoming challenges and positioning tourism as a central pillar of sustainable and inclusive growth.

The 11 BRICS countries demonstrate resilience and transformation in their tourism sectors. Following the unprecedented shock of COVID-19, there has been a significant—although uneven—recovery, driven by domestic and regional markets and adaptations to new traveler preferences. With their diverse attractions, ranging from ancient cultural icons to breathtaking natural landscapes and modern megacities, BRICS countries are repositioning tourism as a sustainable development and cooperation driver.

The coming years will be crucial for consolidating positive trends, deepening intra-BRICS tourism integration, and promoting growth that

balances economic benefits with cultural appreciation and environmental conservation. In the face of significant challenges posed by climate change, ensuring that tourism contributes to achieving the sustainable development goals of BRICS members is essential.

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