

Internet Distribution of Travel and Tourism Services: USA – Europe - Brazil

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www.crt.dk

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"E-Business for Tourism", Sao Paulo, Brazil, 15-16 September, 2003

Overview

1. USA: Trends in the US online travel market
2. Europe: Trends in the European online travel market and comparison with the USA
3. Brazil: Trend in Internet usage + Tentative status for the Brazilian online travel market: Airlines - and hotels

Abstract

1. This presentation will discuss the evolution of the online marketplace for travel and tourism services, comparing and contrasting the development in the USA and Europe. Tentatively, the development in Latin America will be discussed, based on key indicators of telecom, computer and Internet usage.

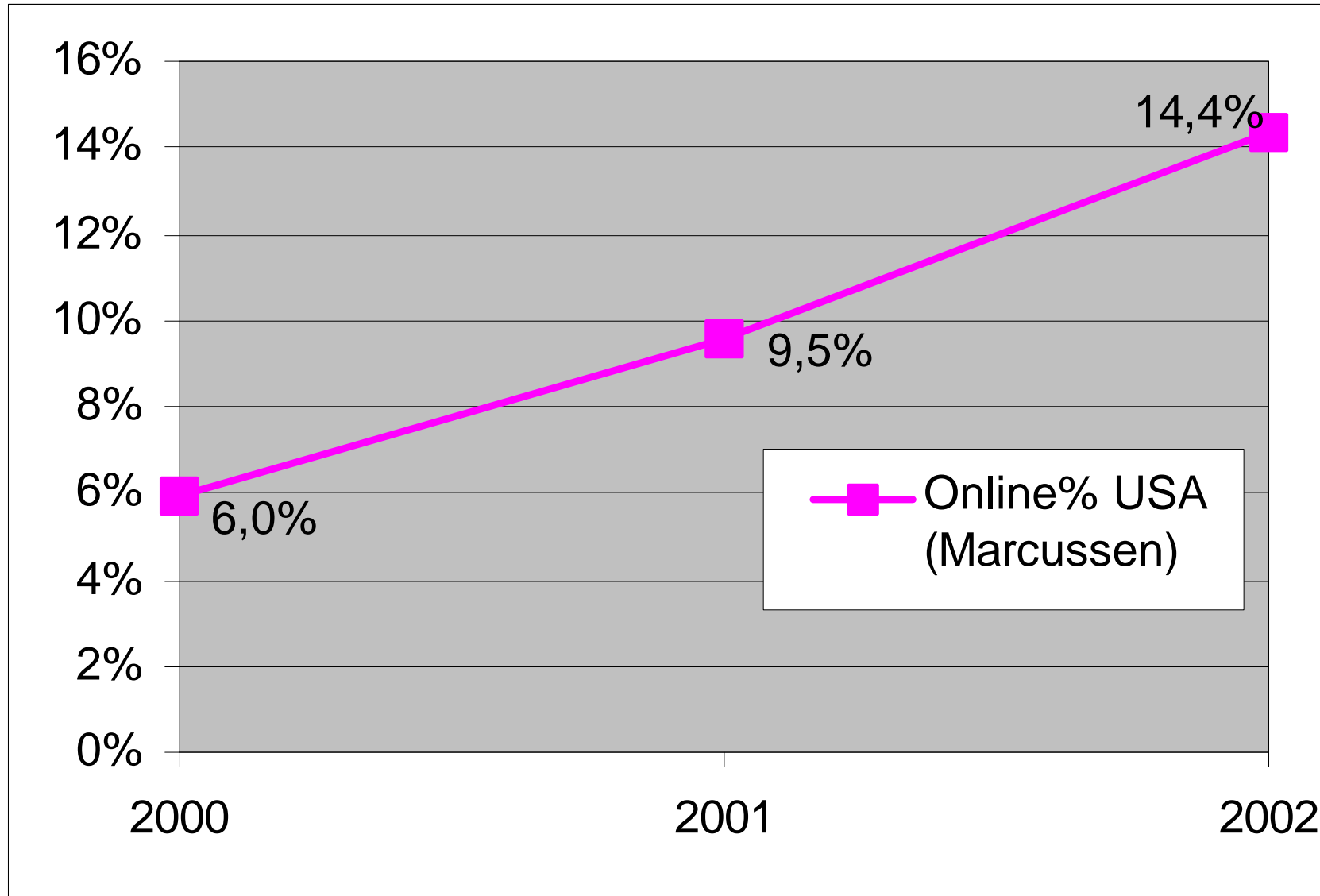
2. Examples of the most successful sites for travel and tourism services in terms of revenue generated in the US and in the different countries in Europe will be shown, and based on that it will be discussed what type of travel services is likely to catch on first in Latin America, e.g. Brazil.

3. The field of Internet distribution of hotels is reviewed. The roles of GDS', online agencies, hotel chains, hotel associations and destination marketing/management organisations are discussed.

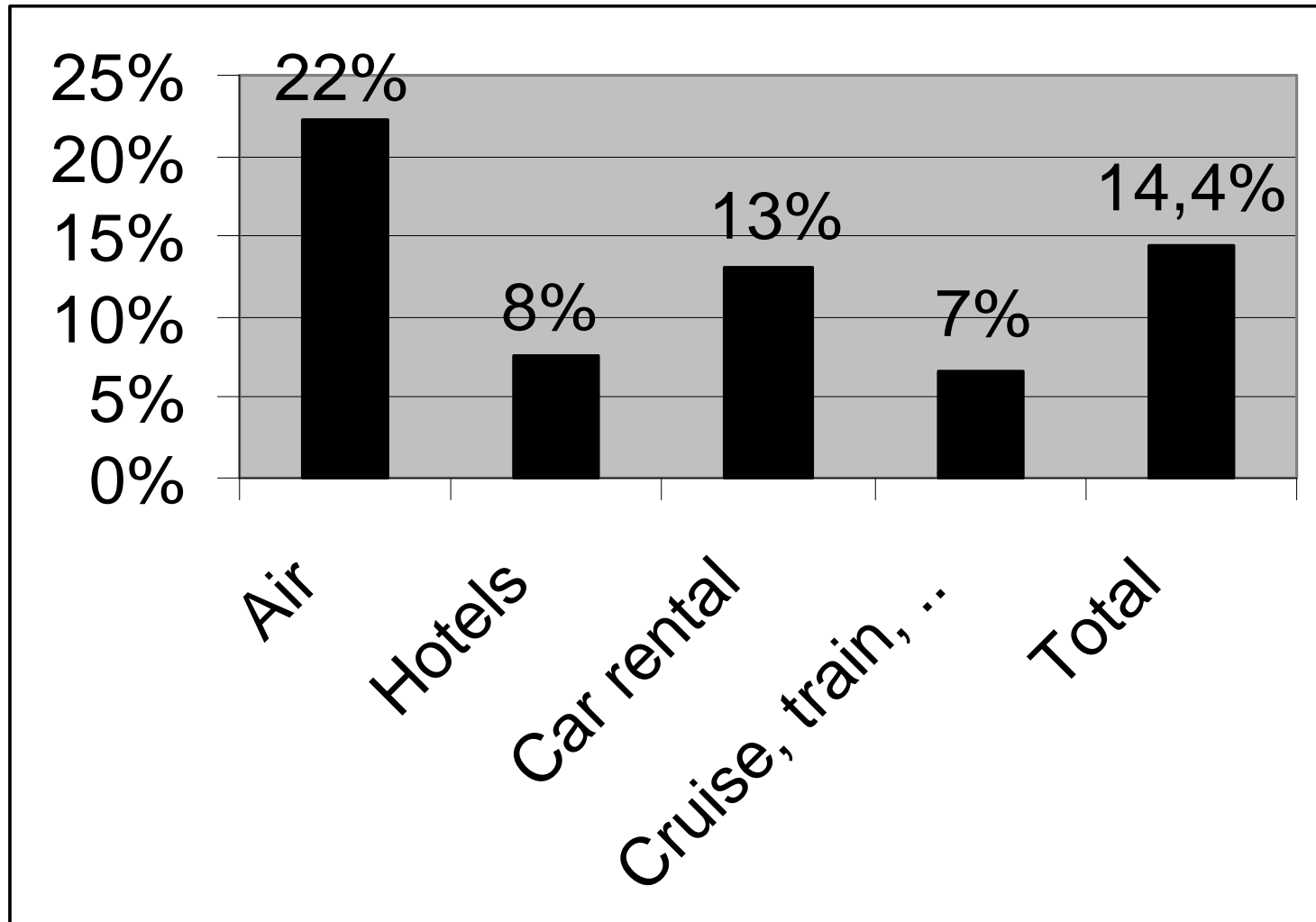
1. USA:

Trends in the US
online travel market

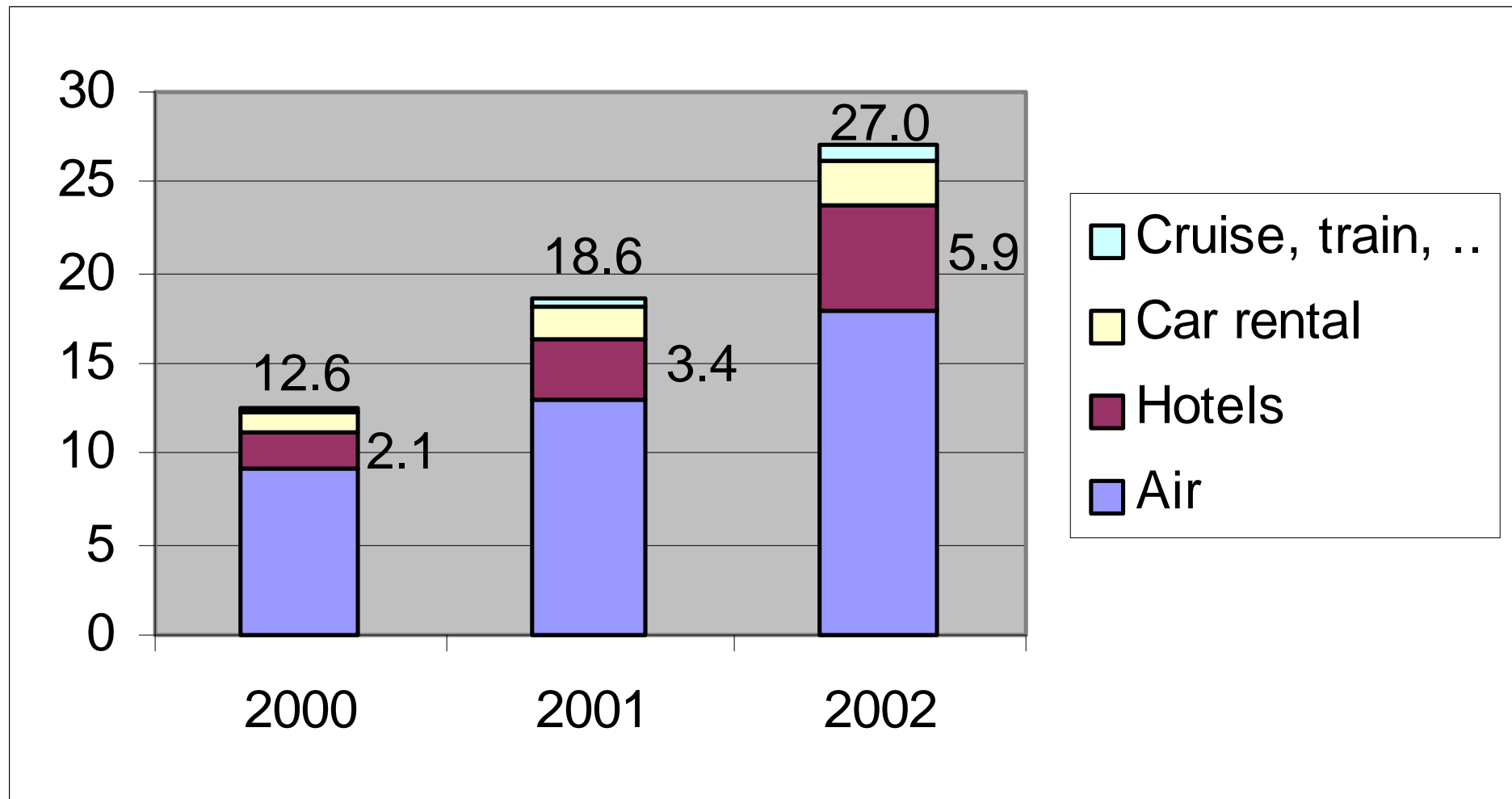
The US online travel market in percent of the total US travel market 2000-2002



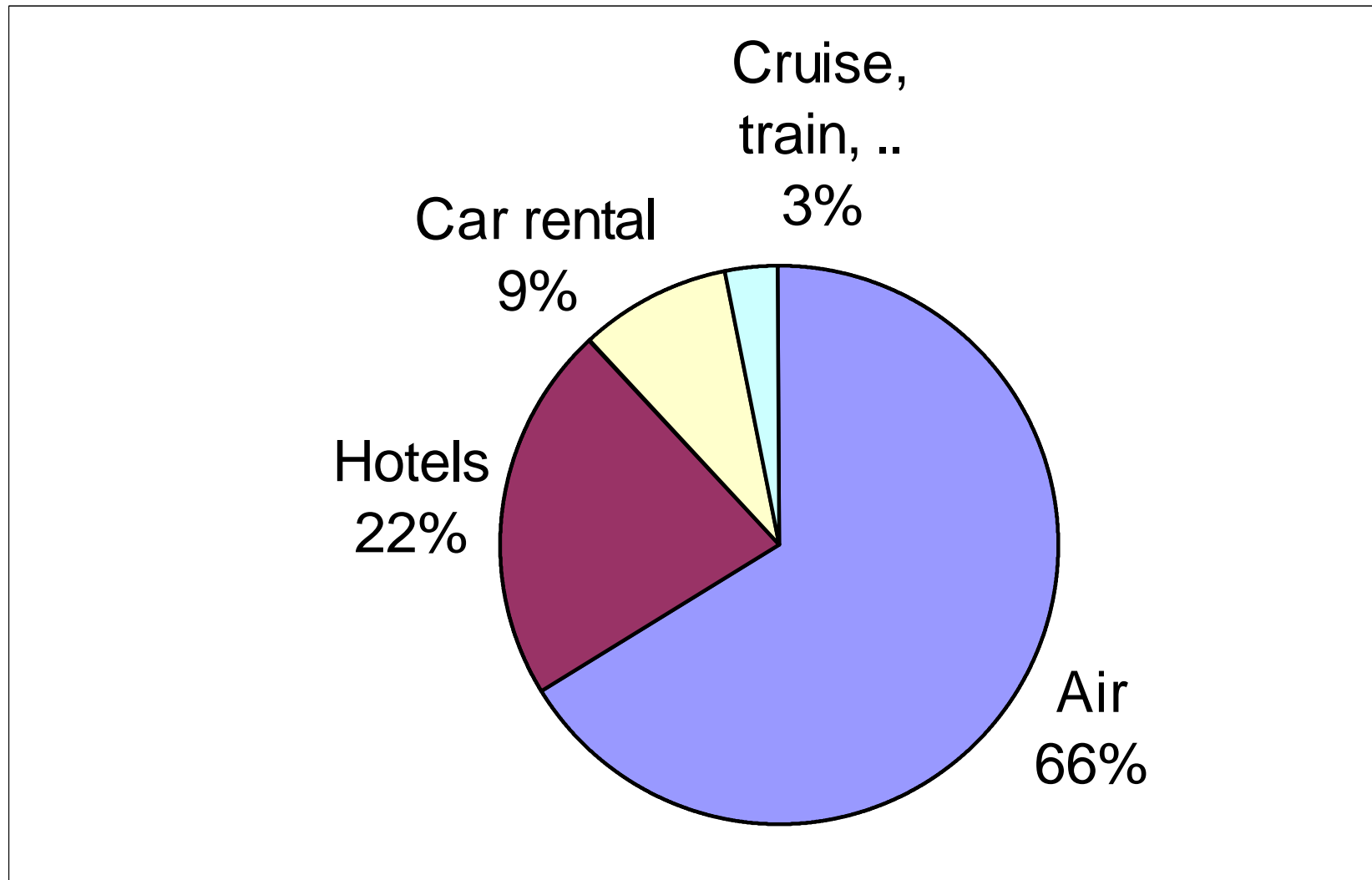
8% of hotel revenue in the US market was generated by online bookings (vs. 22% of airticket sales) in 2002



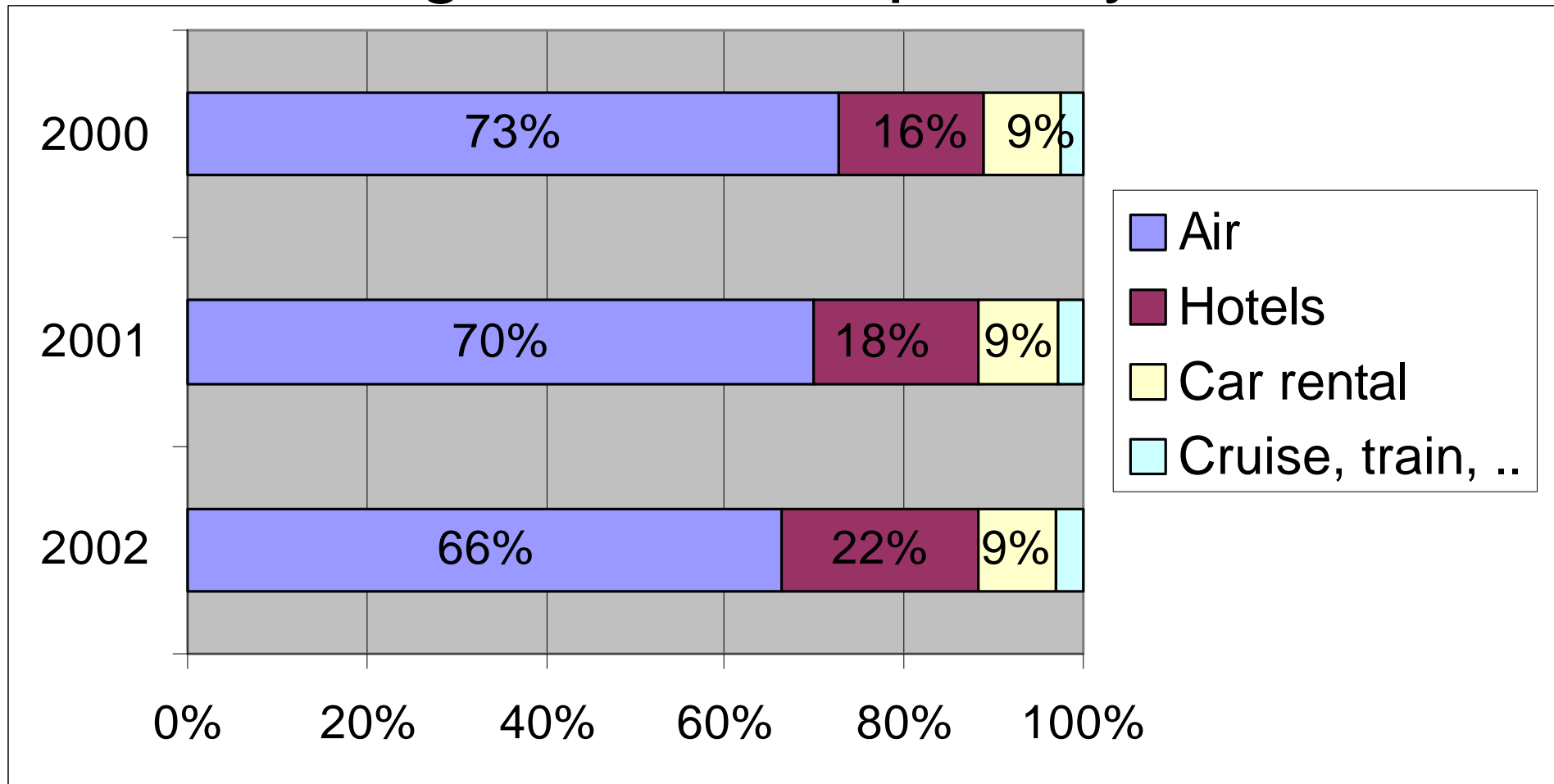
In absolute values all types of travel services increased in the US online travel market 2000-2 (bn. \$)



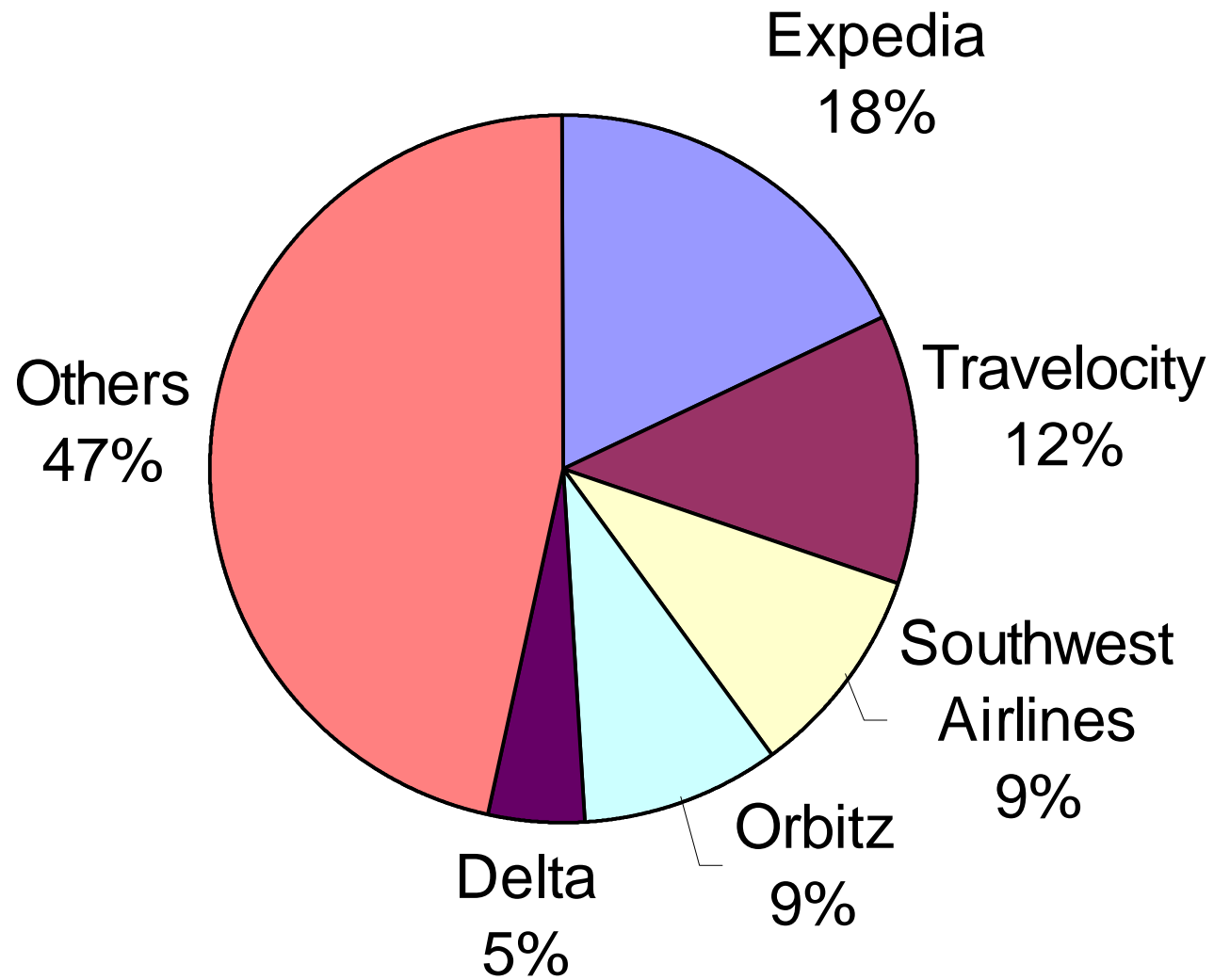
Airtickets accounted for 66% of the US online travel sales in 2002 – hotels was 2nd largest type of service with 22%



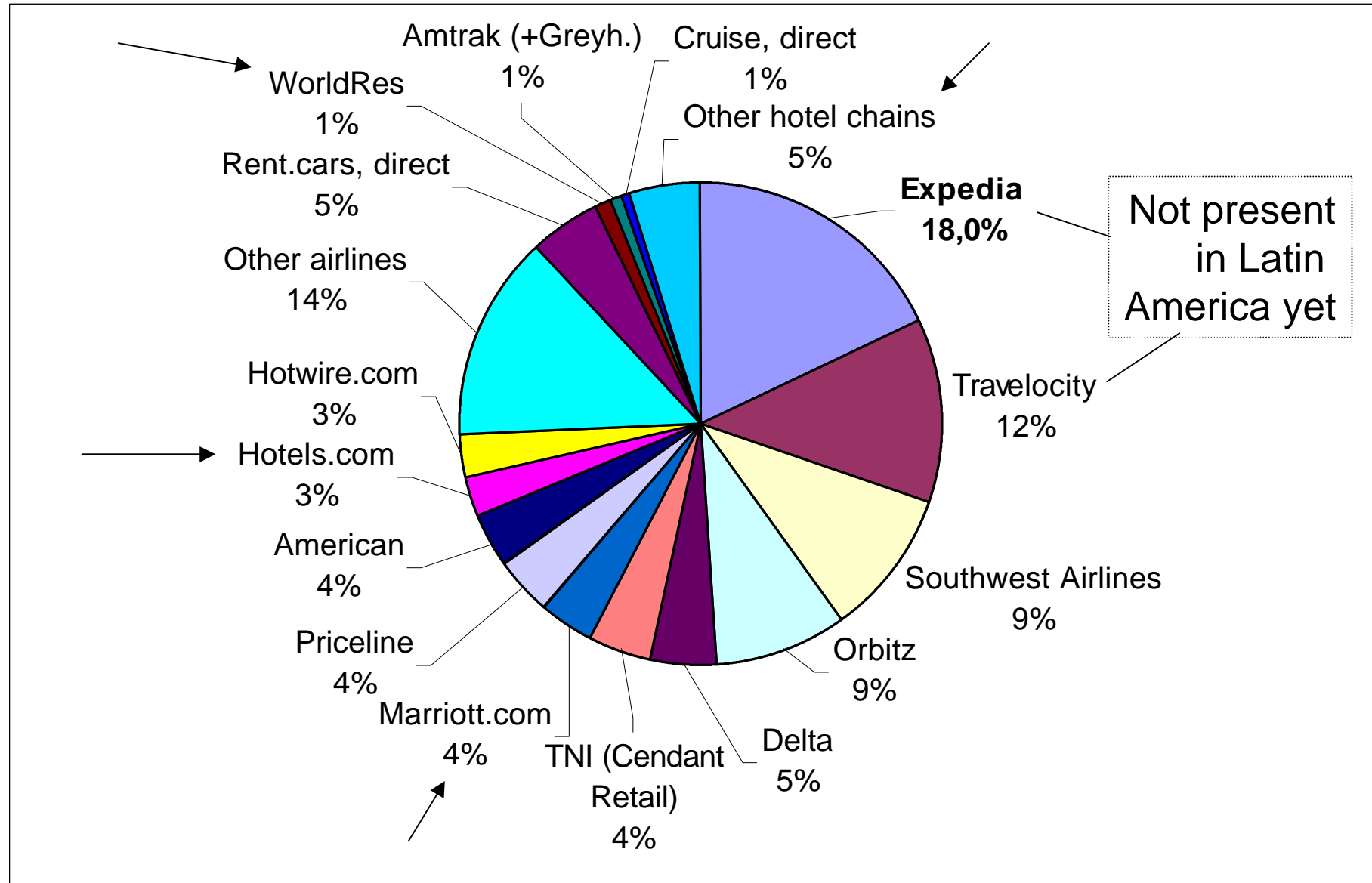
Hotels have been increasing their share of the US online travel market during the last couple of years



Top 5 in the US online travel market 2002 (27.0 bn. \$)



Marriott – largest pure hotel site in the US online travel market 2002





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Marriott Rewards

- Find & Reserve
- Hotel Search Options
- In a City
- Near an Airport
- Near an Address
- Along a Route
- By Leisure Activity
- Hotel Directory
- Confirm/Cancel Reservations
- Telephone Reservations

Search Results — In a City

Marriott: 5 hotels in Brazil

5 hotels were found in Brazil.

Sort by: City | Brand

page 1 of 1

Jump to cities beginning with:

Renaissance Costa do Sauipe Resort>>

Costa do Sauipe

[Check Availability](#)

Rodovia BA 099 KM 76 Linha Verde SLN Costa do Sauipe 48280

[Hotel photo](#)



Costa do Sauipe Marriott Resort & Spa>>

Costa Do Sauipe

[Check Availability](#)

Rodovia BA 099 KM 76 Linha Verde SLN Costa Do Sauipe 48280-000

[Hotel photo](#)



JW Marriott Hotel Rio de Janeiro>>

Rio de Janeiro

[Check Availability](#)

Avenida Atlantica 2600, Copacabana Rio de Janeiro 22041-001

[Hotel photo](#)



Sao Paulo Airport Marriott Hotel>>

Sao Paulo

[Check Availability](#)

Av. Monteiro Lobato S/N Guarulhos Sao Paulo 07190-000

[Hotel photo](#)



Renaissance Sao Paulo Hotel>>

Sao Paulo

[Check Availability](#)

Alameda Santos 2233 Sao Paulo, Sao Paulo 01419-002

[Hotel photo](#)



View Hotels 10 per page

page 1 of 1

You Searched:
Brazil

Modify Search:

Check Availability

Check-in date

Check-out date

Number of guests

Marriott Rewards Number

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[Modify search options >>](#)



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Top Cities: [New York](#), [Las Vegas](#)

TRAVEL SUMMARY

Destination

Augusto's Copacabana Hotel
RIO DE JANIERO, BR

Arrival Date

Sep 11, 2003

Departure Date

Sep 13, 2003

Guests and Rooms

1 Adults, 0 Children
1 Room, 2 Nights

[start over](#)

BOOK ONLINE OR CALL

800 2-HOTELS

(800-246-8357)
Europe: 00800.1066.1066
Vacation Rentals: 800.617.8496

Hotels : Pick a Room and Rate



Augusto's Copacabana Hotel

Rua Bolivar 119
Rio De Janiero Br 22061-020

[map](#) | [printer friendly version](#)

hotels.com:
55 hotels in Rio (of 2134)

LOWEST RATES ... **GUARANTEED!**
Book by phone! Call **800 246-8357**

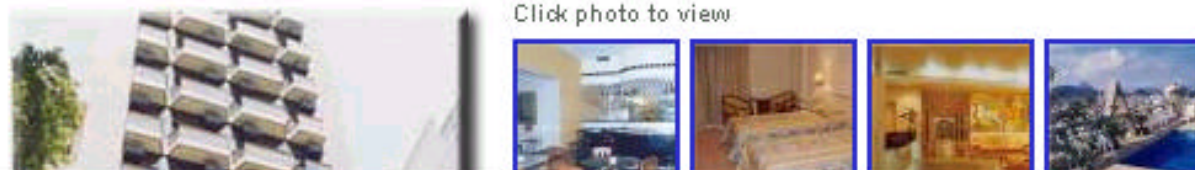
US\$ 60 + 4 per night.

Rates do not include applicable tax recovery charges or our service fees.

Pick a Room and Rate	Average Nightly Rate	Sep 11	Sep 12
Standard 2 People View Room Details	\$ 59.95 BOOK IT	\$ 59.95	\$ 59.95
Standard 3 People View Room Details	\$ 85.95 BOOK IT	\$ 85.95	\$ 85.95

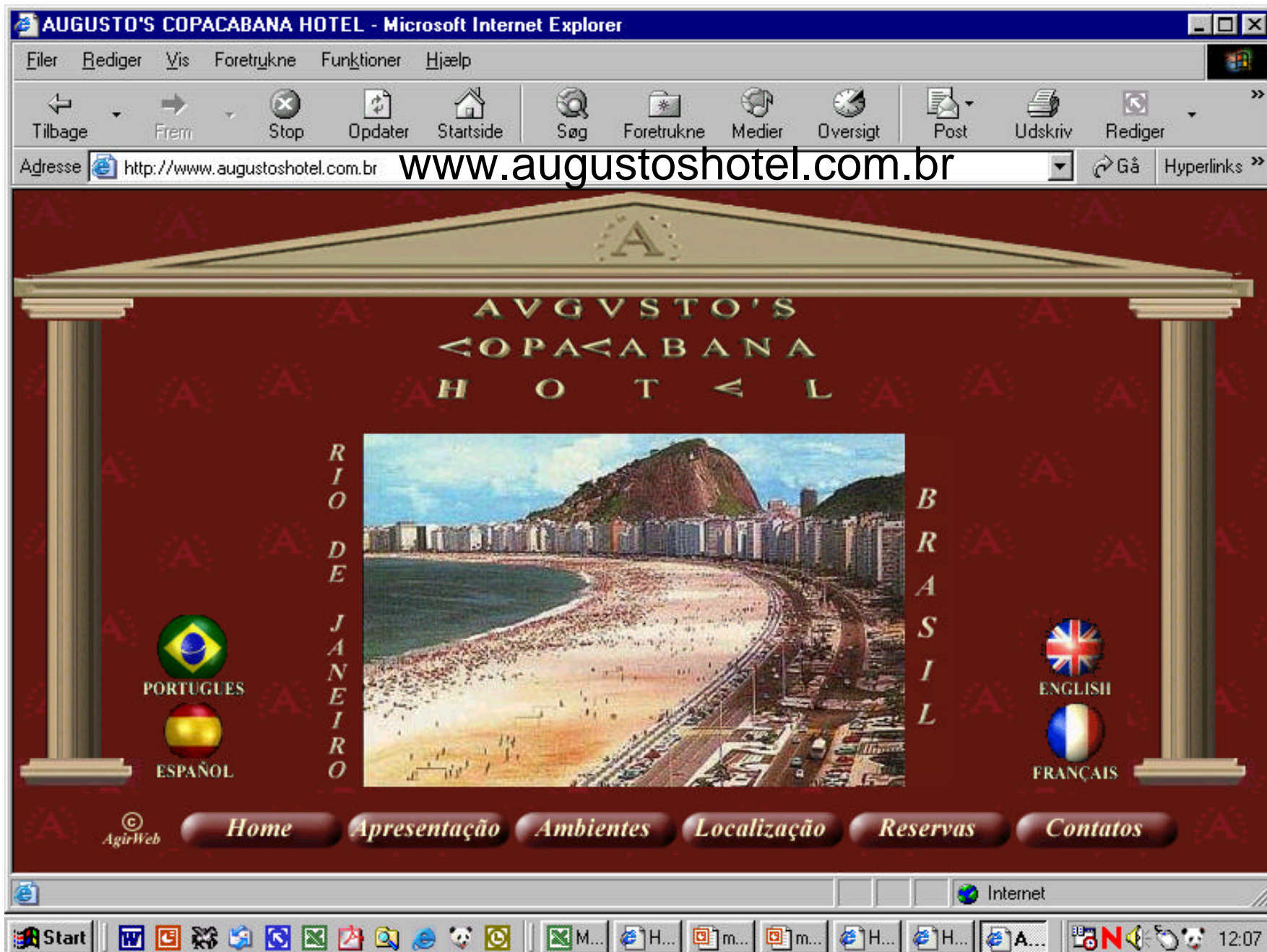
Claimed to be a special Internet rate.

Hotel Details



Click photo to view

Hotels.com got the booking, although Augusto's got "home page".



Augusto's offered same rate, but did not offer online realtime booking.



Rua Visconde de Inhaúma, 95
 Centro - Rio de Janeiro - RJ
 CEP: 20091-000
 Tel: (5521) 2121-1212
 FAX: (5521) 2121-1260

Talk to Us

- ▶ diretoria@hotelsaofrancisco.com.br
- ▶ gerencia@hotelsaofrancisco.com.br
- ▶ reservas@hotelsaofrancisco.com.br
- ▶ sugestoes@hotelsaofrancisco.com.br

Rates

Rack Rate

Type of Accommodation: (Cost per daily room rate)	Single (1 person)	Double (2 people)	Triple (3 people)
STANDARD	US\$ 55,00	US\$ 55,00	US\$ 69,00
SUPERIOR	US\$ 55,00	US\$ 55,00	US\$ 69,00
SUÍTES	US\$ 80,00	US\$ 90,00	US\$ 110,00

US\$55

Economical Standard: with cable TV, air conditioning, minibar and no need of operator for international and long distance calls.

Superior Standard: with cable TV, air conditioning, minibar, telephone with no need of operator for international and long distance calls. Wing of rooms with tiled floor.

Suites: 2 and 3 environments with balcony. All of them with cable TV, air conditioning, minibar and telephone with no need of operator for international and long distance calls.

Consult ours promotionals prices

▶ General conditions

Packages and Special Offers

- GP Brasil of Motorcycling
- Ask us about special rates for groups



Online Reservation

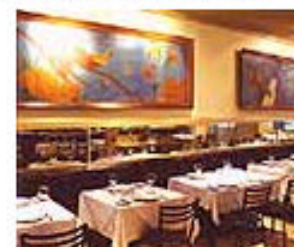
Book right now.

Location

Strategically located on the corner of Avenida Rio Branco, in Business and Historical Center, near the large companies and the Cultural corridor with its Museums and Art Centers. It is about 1 Km

Food and Beverage

SÃO CHICO RESTAURANT



São Chico Restaurant offers international cuisine at lunch time and happy hour with delicious brazilian drinks from 06:00 p.m to 11:00 p.m monday than friday.

▶ [Check our menu](#)

FRISCO RESTAURANT



Frisco Restaurant and Coffee Shop opens every day to serve our delicious breakfast, and in lunch and dinner you can have our traditional Executive Buffet at economical price.

▶ [Check our menu](#)

AMERICAN-BAR WITH WHISKEY

Start search over ▾
[Back to search results](#)

Grande Hotel Sao Francisco

- Overview
- Location
- Property info
- Room features
- Photos**



[More information about this property](#)

Discounts Rate	US\$46
Standard Rate	US\$55

At a later time there was NO discount rate for this hotel.

Expedia.com:
79 hotels in Rio
(of 2134=4%)

Click on thumbnails to see large photos





Hotels of Brazil

Reservations of hotels with confirmation in real time.

[» Search of hotels](#) (login, click [here](#))

City **Point of Interest** **Airport**

Country:

City:

Arrival: » [Calendar](#)

Departure: » [Calendar](#)

Adult: Child:

Guest Preferences (optional)

Proximity:

Distance: km

Hotel: Maximum Rate (R\$):

Chain:

Home





GRANDE HOTEL SAO FRANCISCO
 Address: RUA VISCONDE DE INHAUMA, 95
 Quarter: CENTRO
 City: Rio de Janeiro
 Zip Code: 20091000
 Tel.: 21-21211212
 Fax: 21-21211260
 Internet: HOTELSAOFRANCISCO.COM.BR
 Category: * * *

[More photos from the hotel](#)

Periodo of: **Sat, 13/09/2003 a Sun, 14/09/2003**

BRL 114 = US\$38 !!

(rate valid all days of week)

These accommodations are availables.

» **To make your reservation, click in accommodations type in accordance with your choice.**

Type of Accommodation	1 Person	2 Persons	Additional
<input checked="" type="checkbox"/> SP-SUPERIOR - TRF ACORDO COM CAFE	BRL 114,00	BRL 128,00	BRL 51,00
<input checked="" type="checkbox"/> ST-STANDARD - TRF ACORDO COM CAFE	BRL 114,00	BRL 128,00	BRL 51,00

Services



» [Legends of icons](#)

Rooms Features

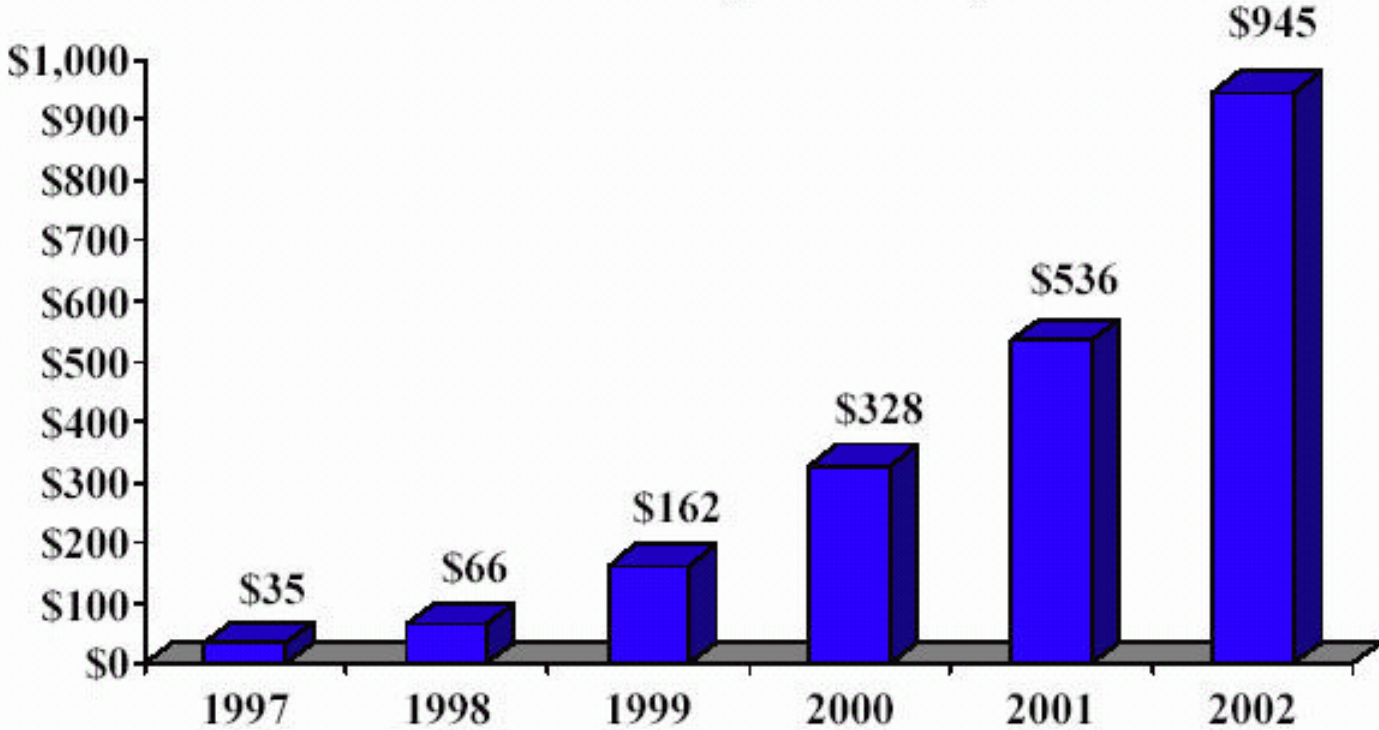


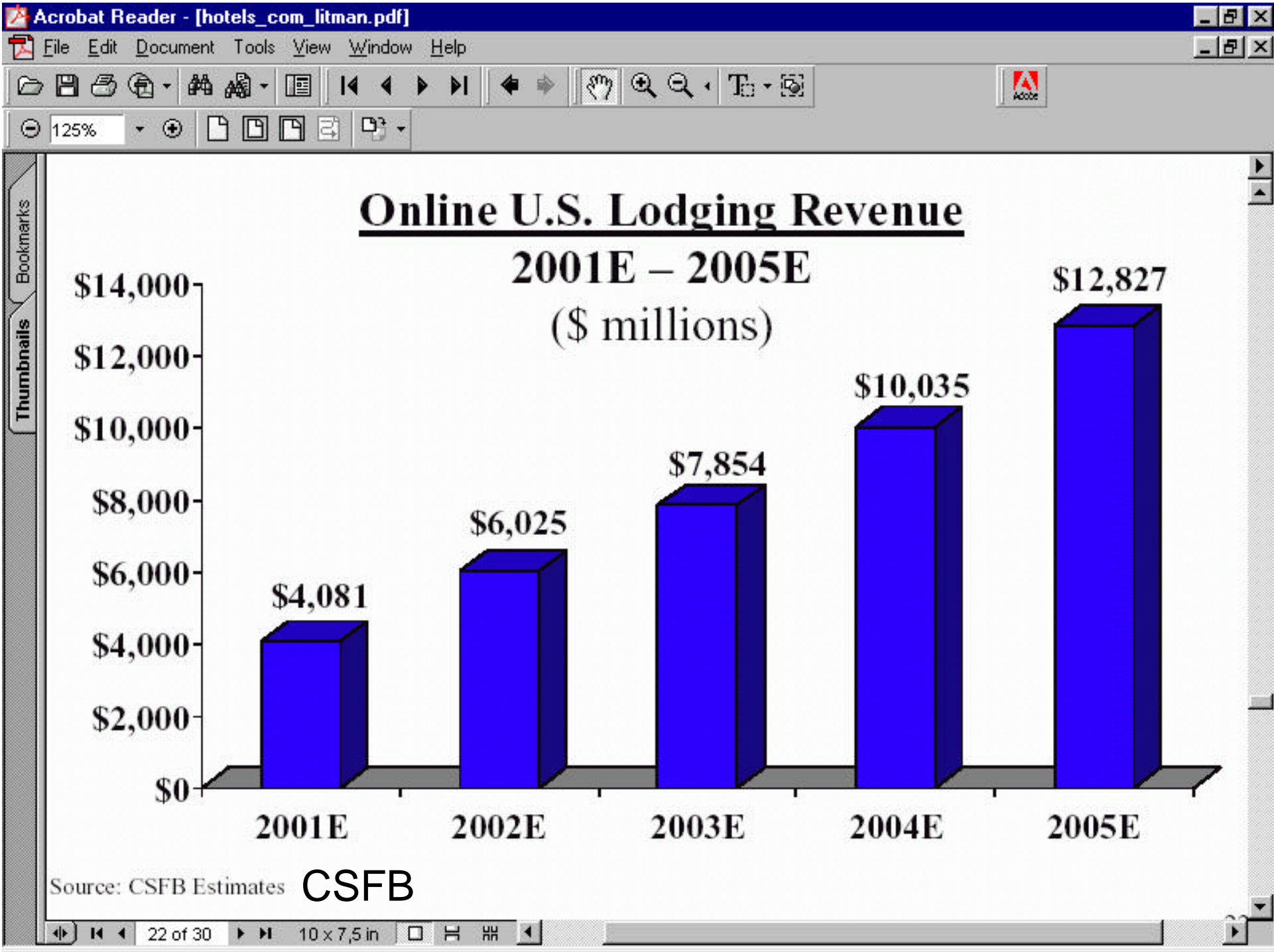
» [Return to the hotels selection](#)

Dramatic Online Shift



Growth in Revenue 1997 – 2002 (millions)



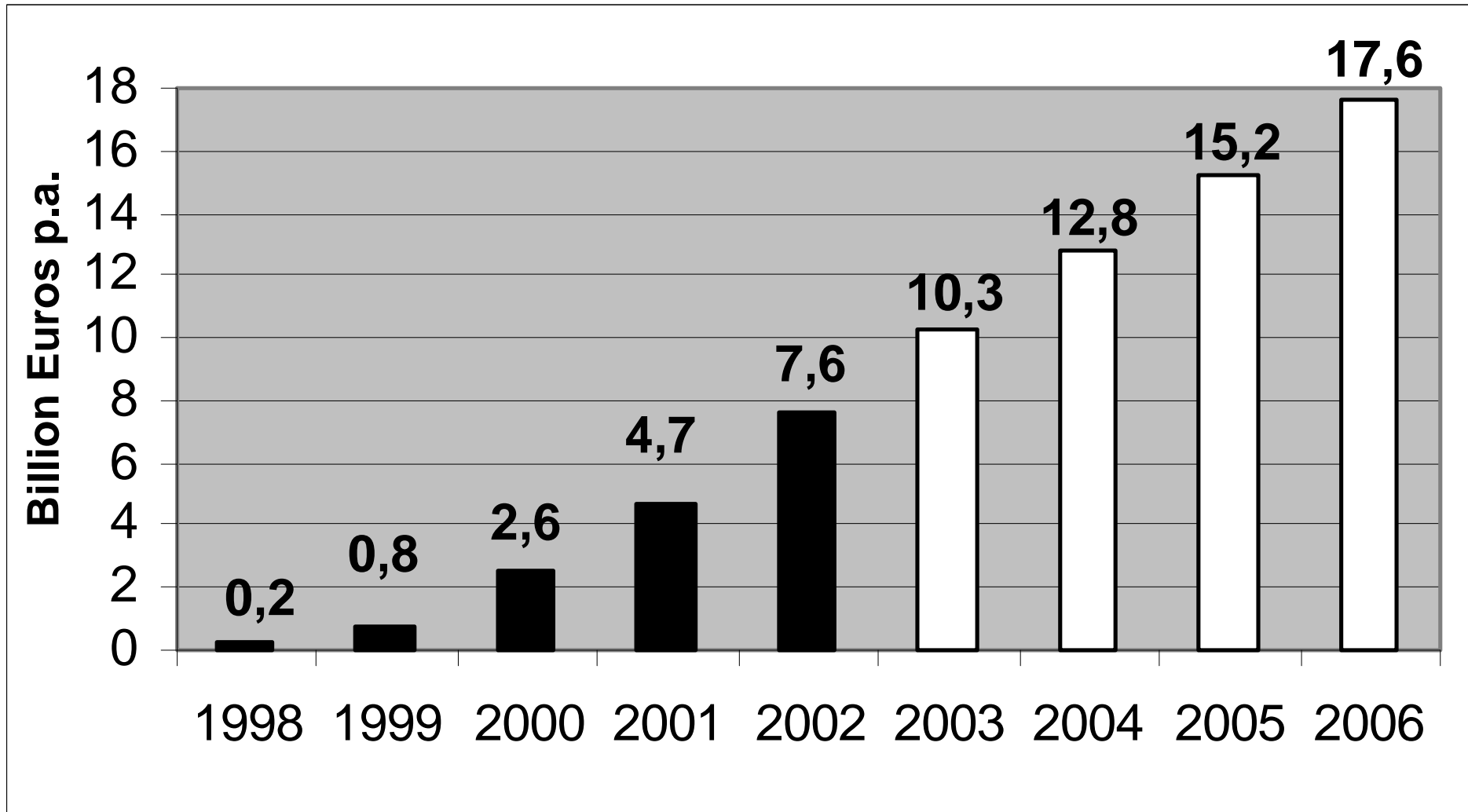


2. Europe:

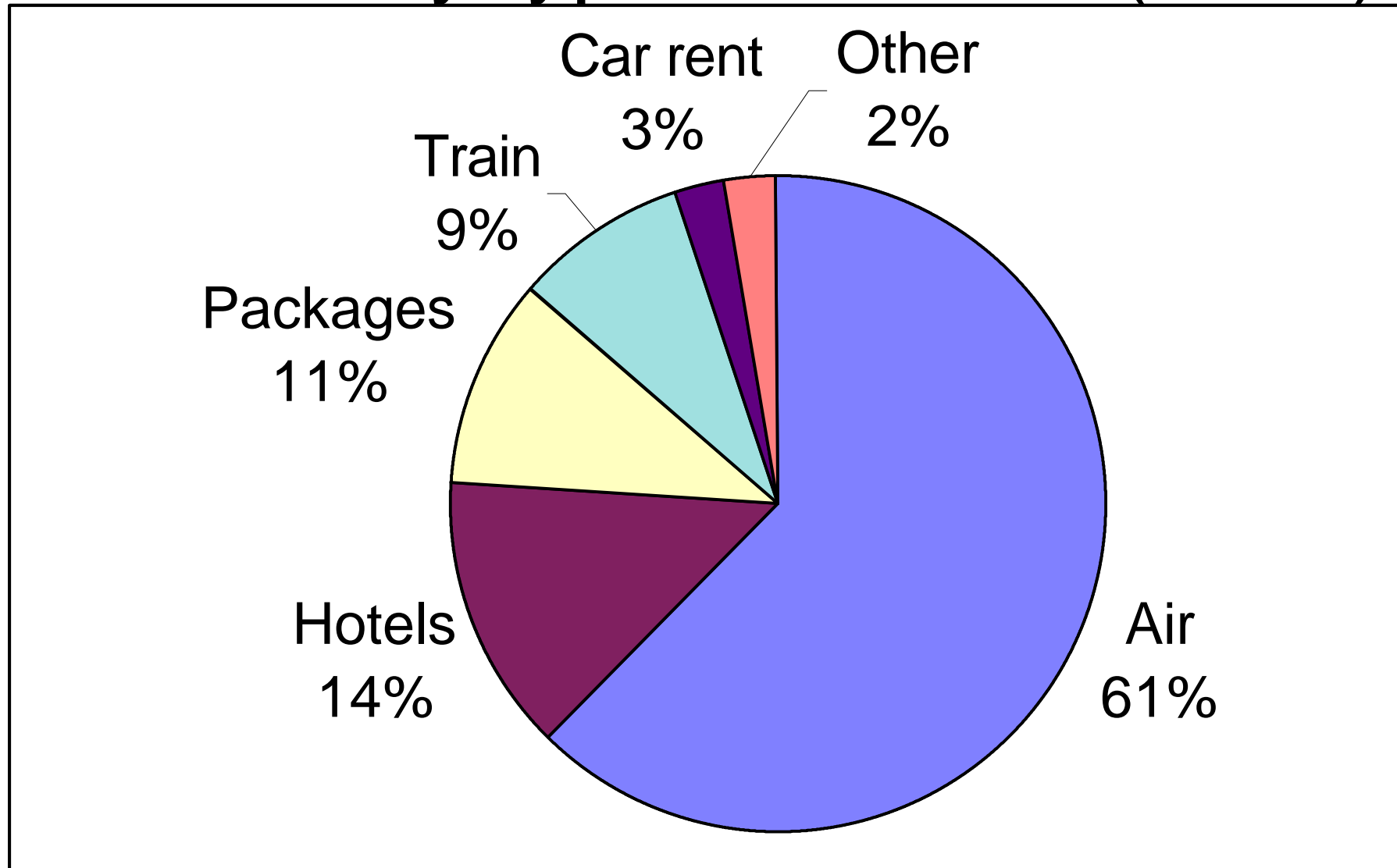
Trends in the European online
travel/tourism market

- and comparison with the USA

Trends in overall online travel market size - Western Europe 1998–2002-2006



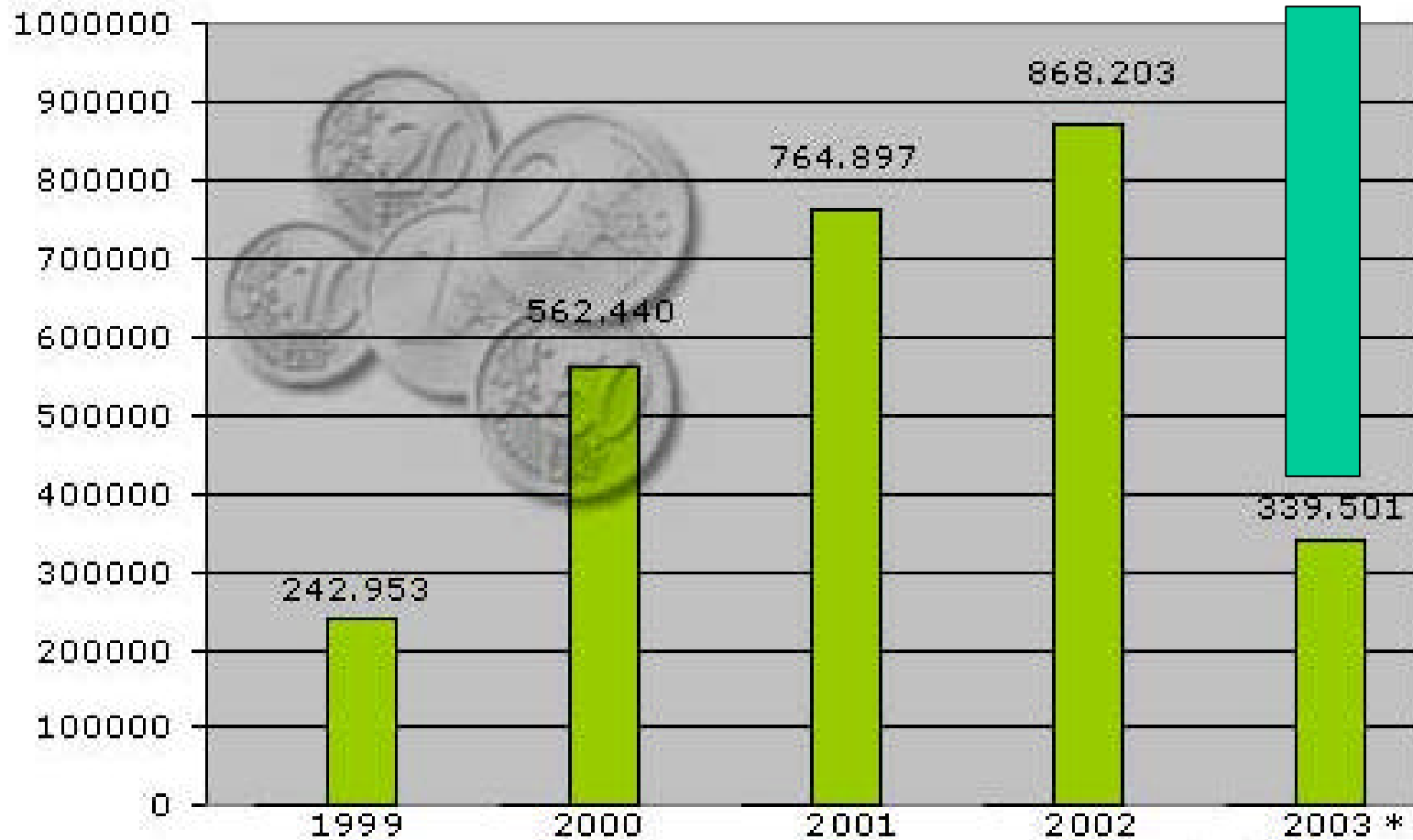
The European online travel market by type of service (2002)



The largest hotel booking site in Europe is tiscover.com, Austria



Reservierungsanfragen/Buchungen
Jahresvergleich



* Jän-Apr

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Tiscover.com is your electronic guide for made to measure holidays: travel, recreation, sports, activities, weather and traffic reports, online booking of hotels and package deals. Choose from a wide range of regions, resorts, hotels, accommodations, B&Bs and holiday apartments!



Select Country/Holiday Region:

Country

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Autumn Hikes



Autumn time - hiking time! When the heat of summer sags and landscapes show their most beautiful autumn colors it is the best time for impressive and most recreative tours. Hike into autumn and check our hiking offers!

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Trivia Game



WIN! A Week for Two plus Breakfasts & Dinners at a Wienerwald Hotel!

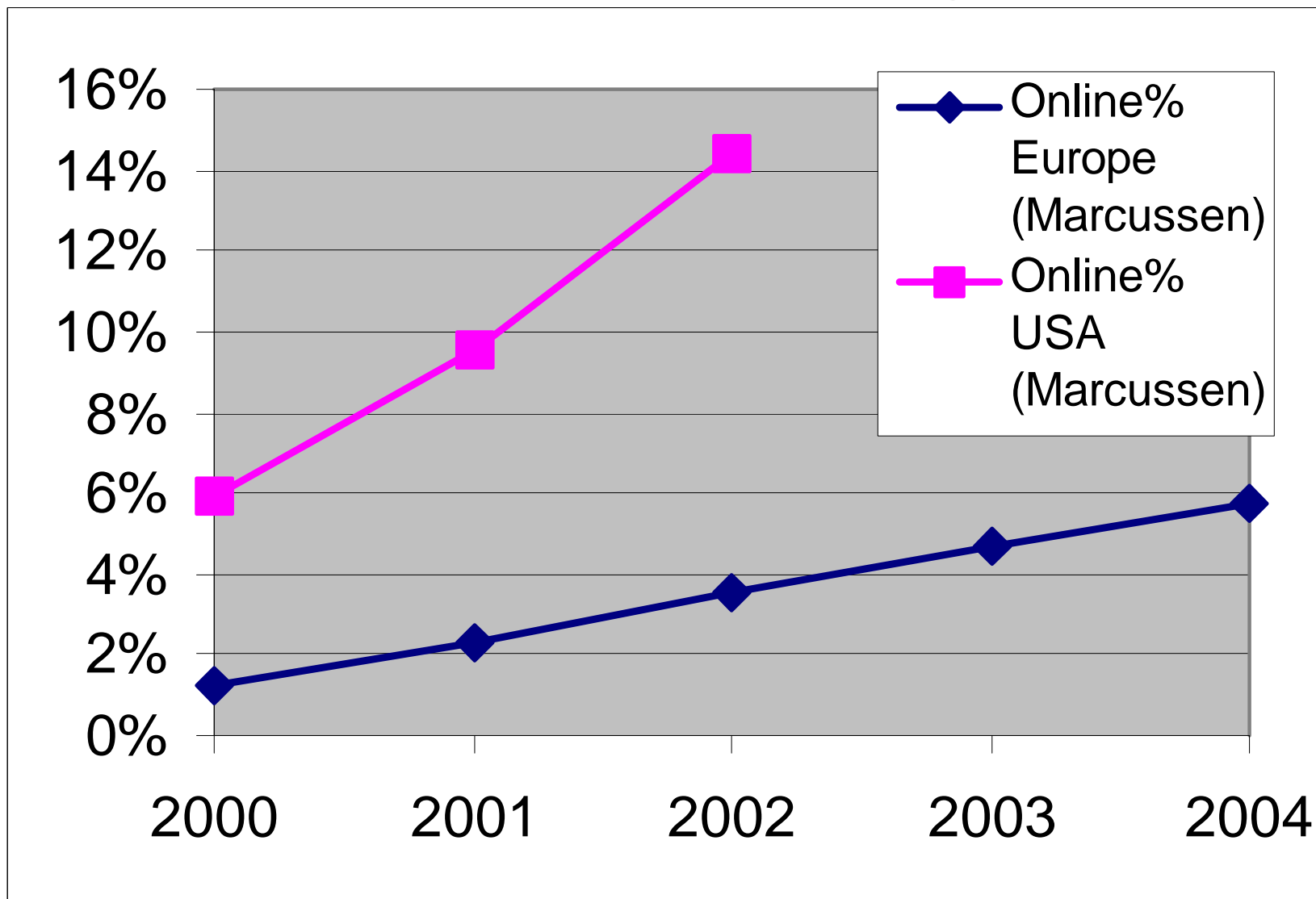
Swarovski e-shop



Eurohappening



Europe is not catching up (%)



3. Brazil:

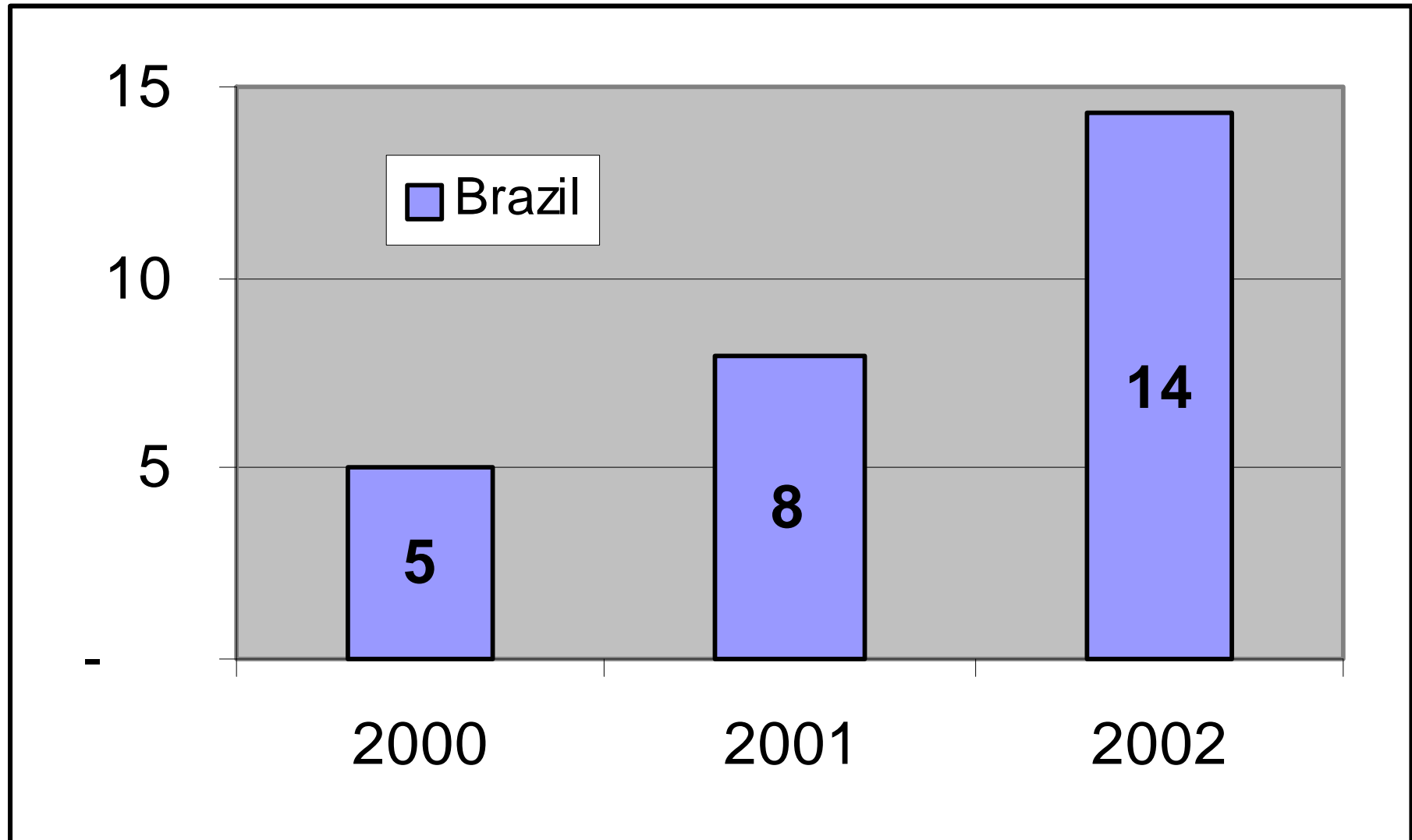
Tentative status and outlook:

Internet users 2000-2002

Airlines – and hotels online

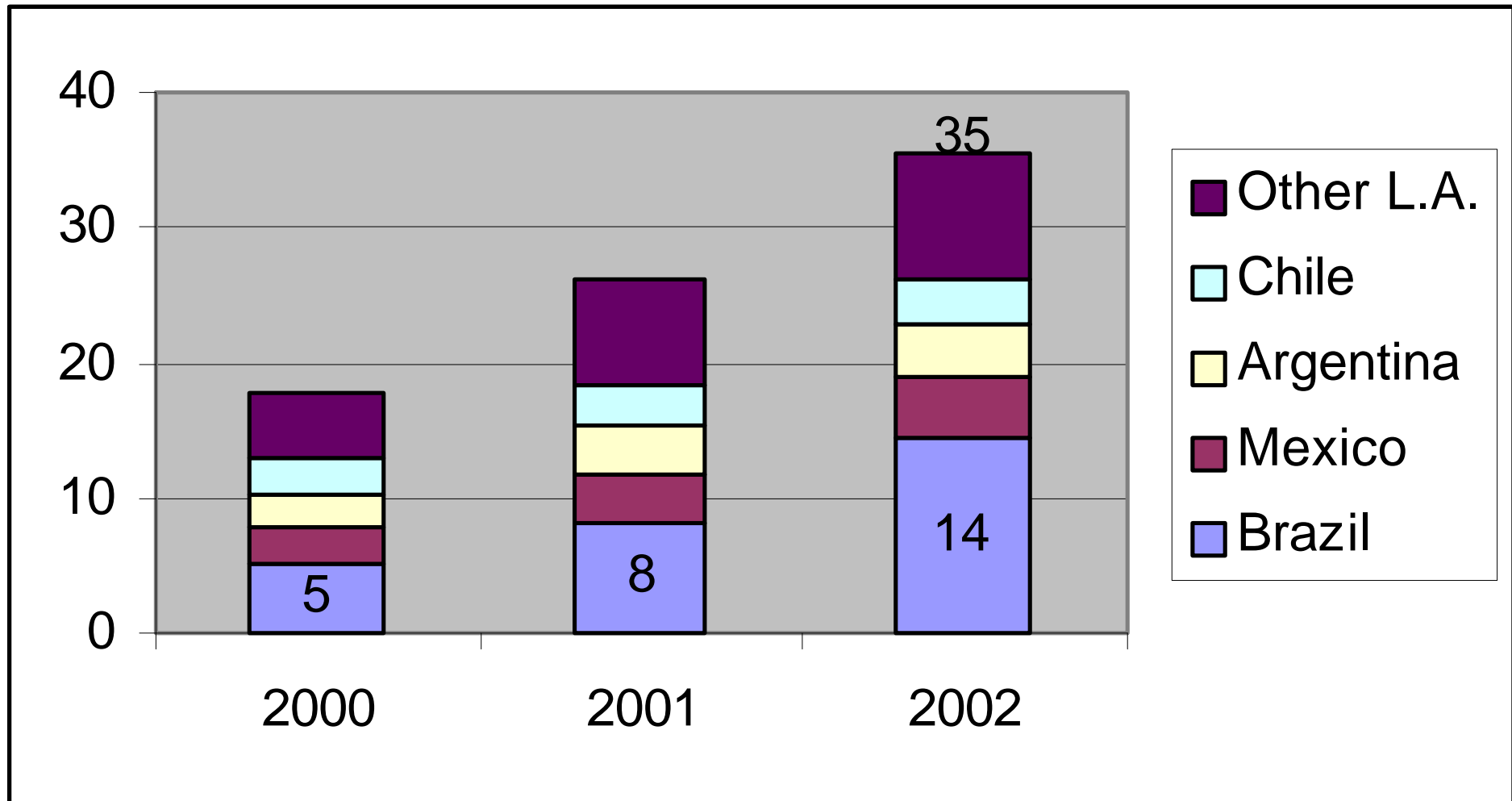
- Hotel chains online
- Hotels in SP, Rio, .. and a seaside resort (Buzio) online

Internet users in Brazil, 2000-2002



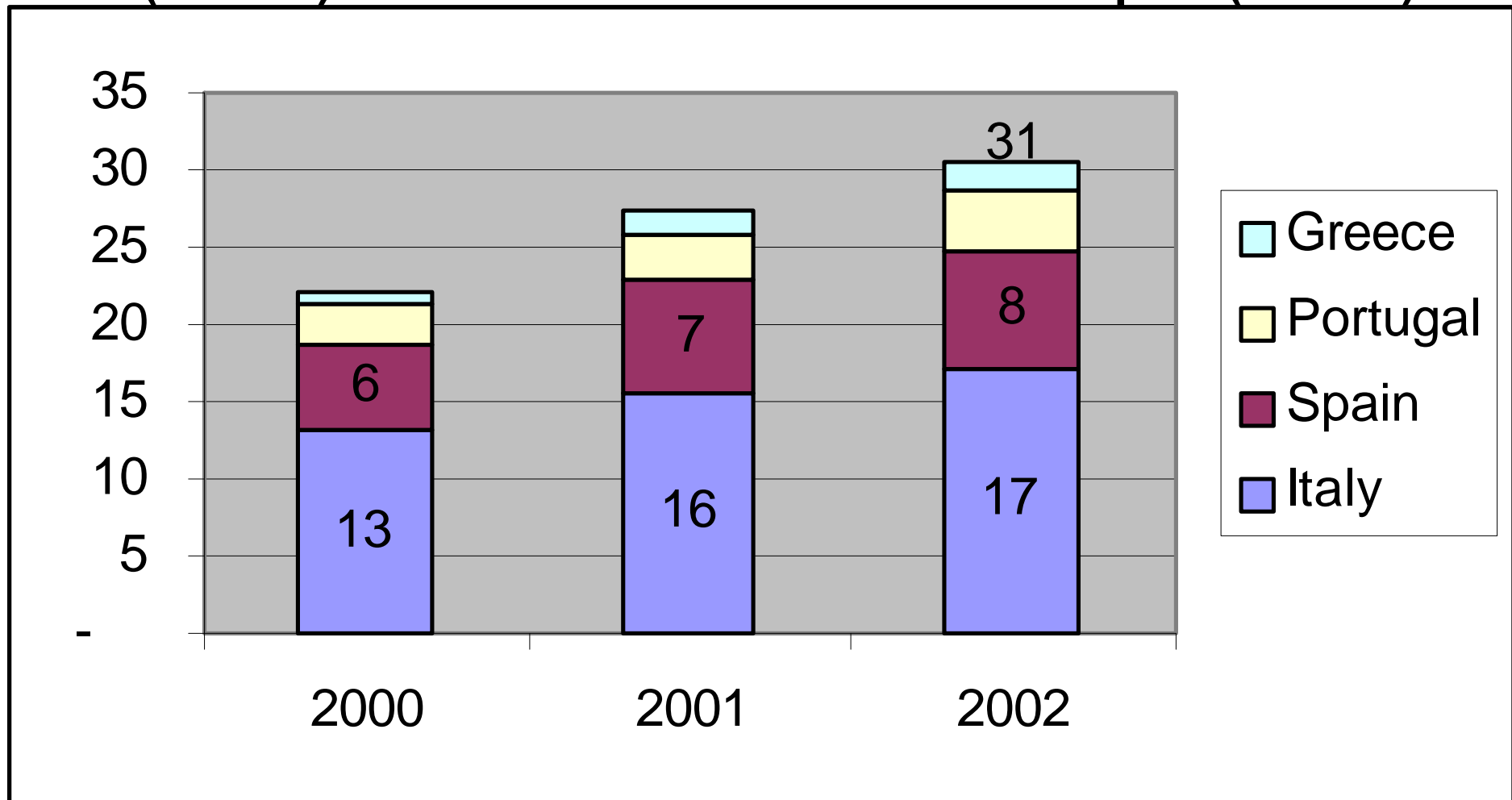
Source: International Telecom. Union, ITU, Sept. 2003

Internet users in Latin America, 35 million in 2002, of which Brazil 40%



Source: International Telecom. Union, ITU, Sept. 2003

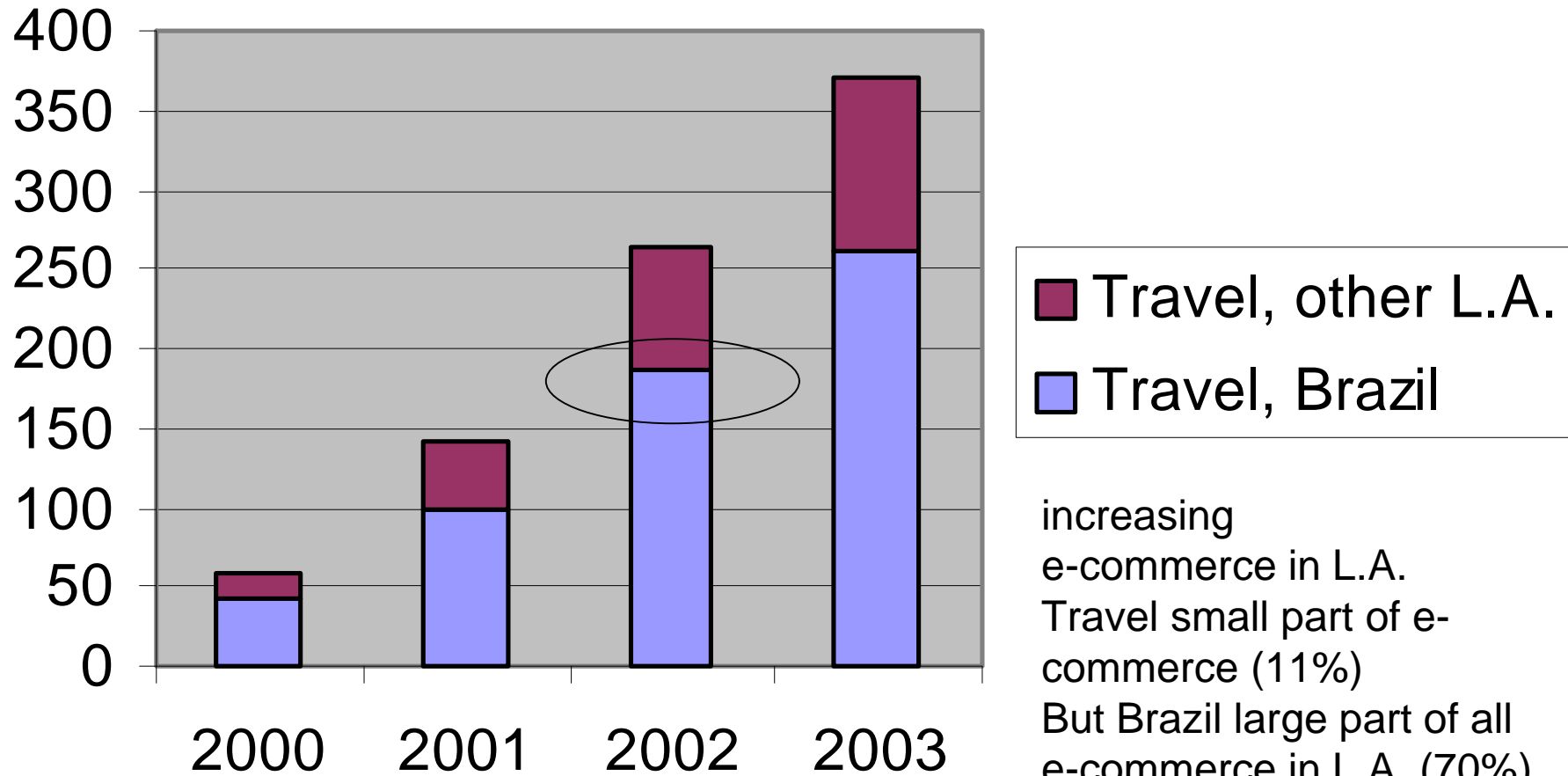
Soon more Internet users Brazil than in Italy. More internet users in L.A. (35m) than in Southern Europe (31m).



Source: International Telecom. Union, ITU, Sept. 2003

Online travel market on the rise in Latin America

Mill.
US\$



Which is or will be the largest travel site in Brazil, in terms of revenue generated online?

Certainly an airline, ... but will it be

Varig 36% - merging with **TAM 33%** - or **GOL 17%** of domestic market (pass.km)

Varig: Great turnover, many international passengers

TAM: Many domestic passengers

GOL: Low prices at buzzy routes, domestic only

GOL: A candidate for a high-flier in the Brazilian online travel market

www.voegol.com.br/

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COMPRE AQUI / SELECIONE / VERIFIQUE / CONTATO / COMPRE / CONFIRME

VERIFIQUE ▼ Rio (S. Dumont) S. Paulo (Congonhas)

Ida escolhida

	Tarifa T- exclusiva Web Adulto	R\$147,00	Dom, 01 Jun 03 Vôo G31708	10:30 Saída 11:30 Chegada	SP-Congonhas (CGH) Rio-Galeão (GIG)
--	--------------------------------	-----------	------------------------------	------------------------------	--

GOL: R\$ 170, own way, weekend, or R\$256 during week, incl. R\$7 tax.

Volta escolhida

	Tarifa T- exclusiva Web Adulto	R\$147,00	Ter, 03 Jun 03 Vôo G31697	11:30 Saída 12:26 Chegada	Rio-Galeão (GIG) SP-Congonhas (CGH)
--	--------------------------------	-----------	------------------------------	------------------------------	--

TAM: Rio (S. Dumont) S. Paulo (Congonhas) R\$199 Sábados e Domingos – codesharing with Varig – some flight operated by Varig (+R\$ 7 tax).

Preços

Ida (Tarifa T- exclusiva Web)		
1 Adulto	R\$147,00	R\$
Taxa de Embarque (detalhes)		R\$ 7,20

Detalhes das tarifas

Ida (Tarifa T- exclusiva Web)
 -Tarifa promocional, exclusiva de Internet (WEB) em classe economica, valida na classe tarifaria indicada, exclusivamente, nos voos, datas, e trechos reservados, para compras no Brasil, com pagamento em Real.

The Varig weekend offer is R\$ 225 – or R\$ 328 during week.

e-PONTE
PONTE VARIG RIO SUL

Serviços
Notícias
Mapa do site
Fale Conosco

Mídia VARIG
Como falar com 1 milhão de executivos?
Conheça a [Mídia VARIG](#).

Tire suas dúvidas!
Confira em nosso [FAQ](#) as perguntas e respostas mais freqüentes.

Saiba quem são os vencedores dia 08 de setembro.

Compre seu bilhete

origem: SP RJ
 Ida Ida e volta
 bilhete eletrônico

passageiros:

Tarifa Promocional: R\$ 328,00 (por trecho)
Bilhete válido por 12 meses a partir da data compra

Tarifa Weekend: R\$ 218,00 (por trecho)
Bilhete válido por 12 meses a partir da data compra

Taxa de embarque: R\$ 7,20 (por trecho)

Condições dos aeroportos

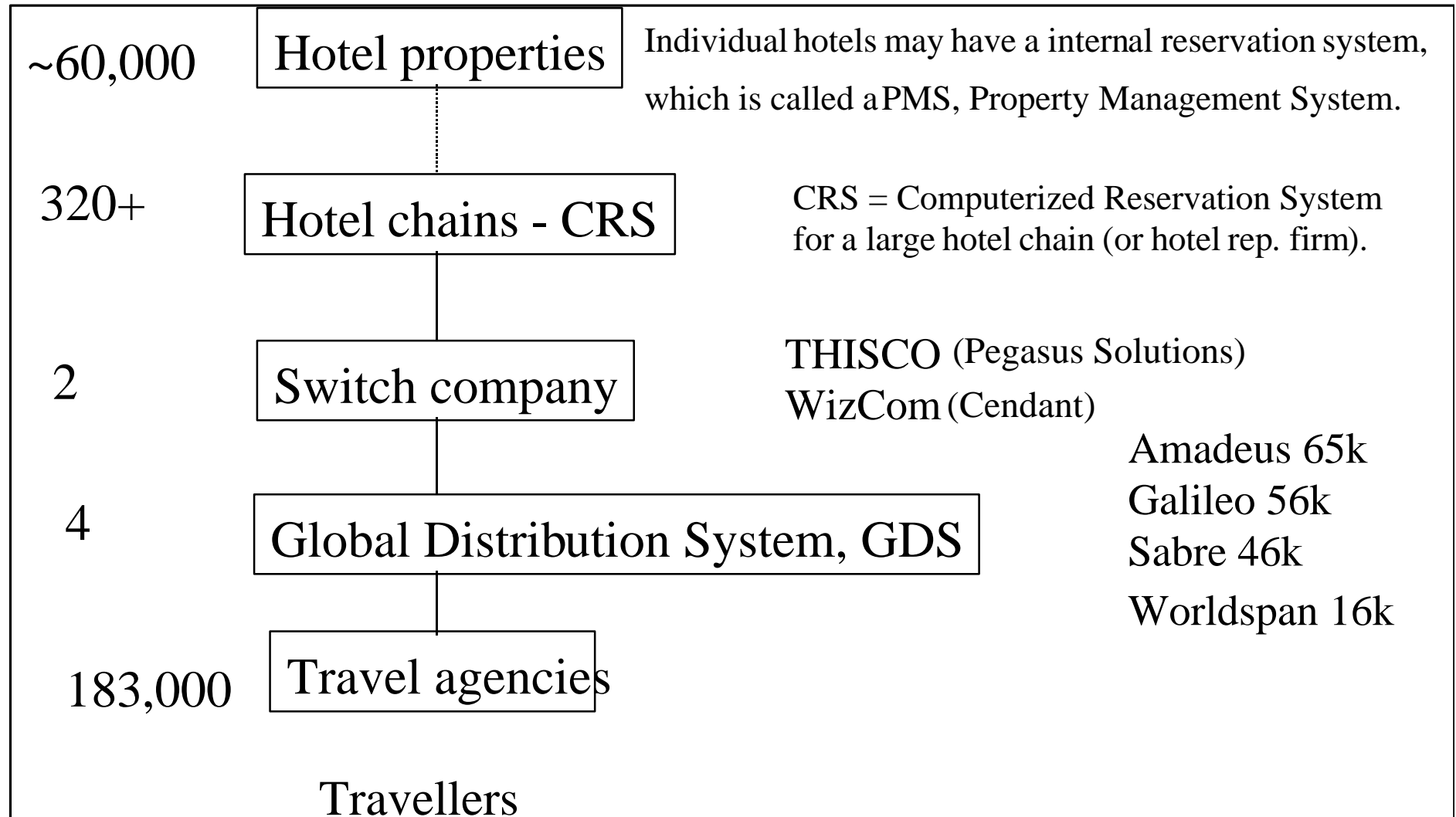
	pouso	decolagem
Congonhas:	aberto	aberto
Santos Dumont:	aberto	aberto

Advice NetBusiness

MySmiles Número do cartão: Senha: [Solicitação de senha](#)

https://internetsegura.varig.com.br/eponete/index_ssl.htm

The traditional electronic hotel distribution chain - before Internet: Via GDS' to travel agencies



Internet distribution for hotels

All the types of actors mentioned before
- and more, such as DMO's and online agents -
can act as a platform for making hotels present on
the WWW for tourists and business travellers alike

- 1) with some kind of booking functionality:
 - online 'real-time' bookings
(with availability data and instant confirmation)
 - or just bookings on a request basis – and
- 2) with content (in one or more languages)

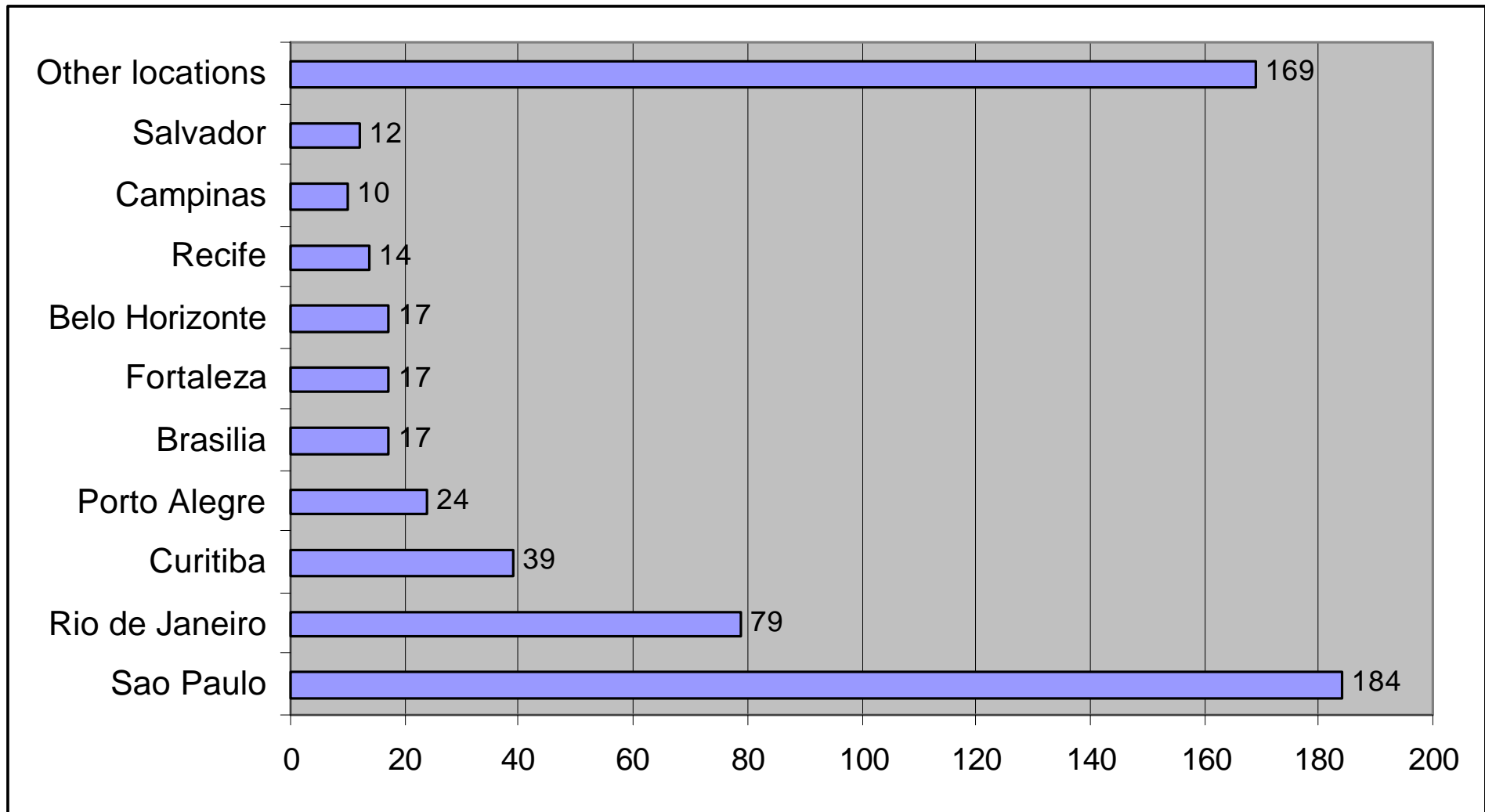
Booking functionality of hotel web-sites:

No. of hotels	Booking functionality	Booking on @ request basis only	Online "real- time" bookings
Single hotel		"Home pages" for a single hotel	Not common
Multiple hotels		Internet based hotel lists with booking request function	Hotels in chains (or similar) and advanced destinations

Hotels in cities with an international airport tend to be online bookable in real-time, with instant confirmation – if they are on the Internet at all.

Hotels in town without an international airport tend not to be online bookable in real-time, but many have a simple "home-page" anyway.

Online real-time bookable hotels in Brazil: About 600 (~582) of 10,000.



Most major hotel chains in Brazil have got English language versions, and online (real-time) booking

	<u>Units</u>	<u>English?</u>	<u>Online booking?</u>
www.accorhotels.com.br/	115	Yes (a)	Yes
www.choicehotels.com	34 (9 up)	Yes (b)	Yes
www.solmelia.es	23	Yes	Yes
www.hoteis-othon.com.br	22	Yes	Yes
www.bluetree.com.br	19	Yes	Yes
www.riema.com.br/ (<u>flats</u>)	18	Yes	Yes
transamerica <u>flats</u> .com.br/	17	Yes	CMNet
www.tropicalhotel.com.br/	10	No	Yes
www.bestwestern.com.br	9	Yes	Yes
Summithotels.com w/Estanplaza	8	Yes	Yes
www.utell.com w/Golden Tulip	<u>68</u>	Yes	Yes
	<u>343</u>		

(a) English at accorhotels.com; (b) In English, but not in Portuguese.



Sol Meliá - Microsoft Internet Explorer


Tilbage Frem Stop Opdater Startside Søg Foretrukne Medier Oversigt Post Udskriv

Adresse <http://www.granmeliawtcsaopaulo.solmelia.com/> Gå


Español | English

Start Location & transport Rooms Bars & restaurants Services and facilities Leisure Meeting rooms Images


hotels by  Sol Meliá



Gran Meliá WTC Sao Paulo *****G.L. ■
WTC Sao Paulo



The hotel is located in Sao Paulo's World Trade Center complex, in the city's fastest developing district. Just 8 km distance from the Avenida Paulista and the Congonhas regional airport, 54 km from the Cumbica international

BOOK ROOM

MaS program 
Free stays and exclusive services get you MaS card NOW!

airport.
 LOCATION MAP  WEATHER

The rates are .. for a 5 star hotels


Gran Meliá WTC Sao Paulo *****G.L.

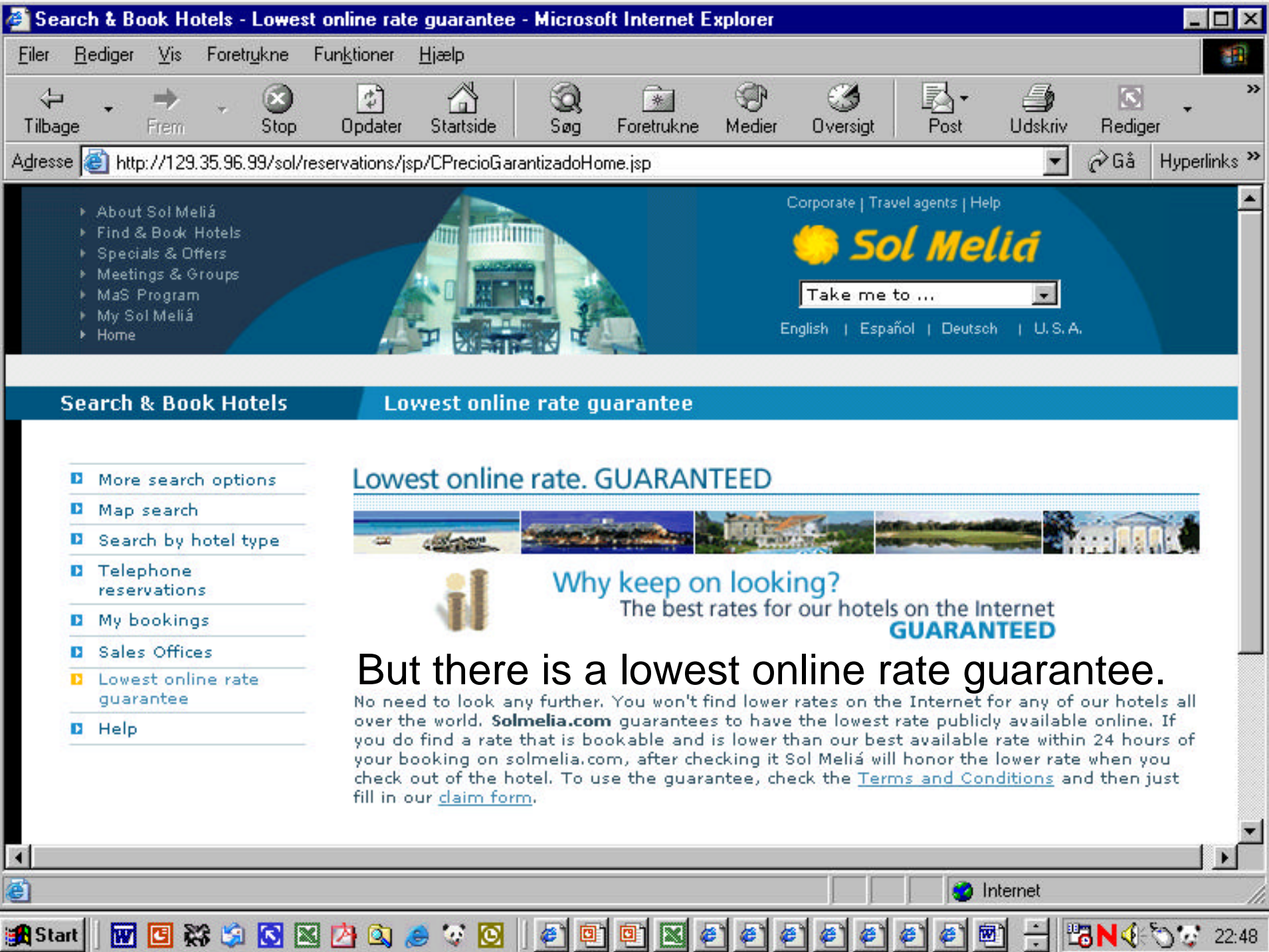
LOCATION: Av. Das Nações Unidas, 12559, Sao Paulo-SP, BRAZIL

Hotel description: The hotel is located in Sao Paulo's World Trade Center complex, in the city's fastest developing district. Just 8 km distance from the Avenida Paulista and the Congonhas regional airport, 54 km from the Cumbica international airport.

[MORE INFORMATION ▶](#) [CHECK ROOM AVAILABILITY ▶](#)

Done Internet

Start  22:17



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No need to look any further. You won't find lower rates on the Internet for any of our hotels all over the world. **Solmelia.com** guarantees to have the lowest rate publicly available online. If you do find a rate that is bookable and is lower than our best available rate within 24 hours of your booking on solmelia.com, after checking it Sol Meliá will honor the lower rate when you check out of the hotel. To use the guarantee, check the [Terms and Conditions](#) and then just fill in our [claim form](#).



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- Faça já o seu cartão

Programas

Club Bienvenue

O melhor da gastronomia, com descontos em bares e restaurantes.

Fidelité

O programa de felicidade do Sofitel. Participe.

Business

- Seja um Franqueado
- Feiras e Congressos

Encontre e Reserve um Hotel ou Flat

Escolha o seu destino

Procure abaixo uma opção de destino

Escolha uma Cidade

ou veja todos os hotéis

Escolha uma rede

- Sofitel
- Novotel
- Mercure
- Ibis
- Formule 1
- Parthenon

Acesso Direto / Reserva rápida

Código Hotel
Rede Escolha

Consulte/Modifique/Cancele sua Reserva

Promoções & Ofertas Especiais



Final de Semana
Diárias IBIS com preços super especiais

Blumenau, Ibis Blumenau	R\$ 49
Curitiba, Ibis Centro Cívico	R\$ 63
Guarulhos, Ibis Guarulhos	R\$ 43
Manaus, Ibis Manaus	R\$ 85
Paulínia, Ibis Paulínia	R\$ 49
São José dos Campos, Ibis	R\$ 69
São José do Rio Preto, Ibis	R\$ 53
São Paulo, Ibis Congonhas	R\$ 75
São Paulo, Ibis Expo	R\$ 79
Vitória, Ibis Vitória	R\$ 65

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a partir de R\$ **49***

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Reservas Online

Conheça o novo website da rede Ibis. Sua reserva online em 2 cliques.

Feiras & Congressos

Descontos nos hotéis da Rede para diversos eventos. Confira.

Oktoberfest em Blumenau





A special Internet rate is offered!

- The hotel
- Room
- Restaurant/Bar
- Hotel services
- Meetings / Conferences
- Business services & information
- Sports & Leisure
- Tourist information



Datas da estada

Para efetuar uma reserva, escolha o tipo de apartamento e umatarifa disponível.

- Os preços da diária são por dia, porapartamento, de acordo com o número de pessoas e datas,fornecidos anteriormente.
- Não inclui taxas e impostos locais.
- Os valores convertidos em moeda estrangeira são apenas parareferência. Preços e condições sujeitosa alteração sem aviso prévio.

Condições de venda por internet

[Outro tipo de apartamento](#)

Tarifa(s) disponíveis - Tipos de apartamentos - Tipos de apartamentos

Moeda **BRL**

Preço Standard - Quarto Standard com 1 cama casal	
12.09.2003	160.00 BRL
<i>Café da manhã / pessoa / dia (a ser reservado no hotel)</i> 10.00 BRL	
Tarifa especial de internet - Quarto Standard com 1 cama casal	
12.09.2003	89.00 BRL
<i>Café da manhã / pessoa / dia (a ser reservado no hotel)</i> 10.00 BRL	

Sua escolha

Mercure Sao Paulo Downtown / Opening jul 03
 Chegada : 12-09-2003
 Número de noites : 1
 Partida : 13-09-2003

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Showing Records: 1 - 10 of 68

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www.reservehoteis.com.br



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 Cidade:
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 Adultos: Crianças:
 Hotel: Valor Máximo:
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Para alterar seus dados e consultar sua lista de reservas, **Clique Aqui**

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Faça agora o seu **login** e tenha acesso às tarifas exclusivas.

Login:

Senha:

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Diga para **onde** você quer ir e nós damos todas as **dicas** da cidade e seus **Hotéis...**

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Cadastre o seu **Hotel** e venha fazer parte do site ReserveHotéis. **Clique Aqui!**



RS - VARANDA DAS BROMÉLIAS BOUTIQUE HOTEL

Nas reservas realizadas pelo site ReserveHotéis, você ganha de presente uma garrafa de champagne.

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RJ - ARCADIA POUSADA

Faça a sua reserva na Arcádia Pousada em Itaipava e ganhe 50% de desconto na 3ª noite + upgrade da categoria escolhida.

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Promoção Internet Last Minute - Faça a sua reserva no Sofitel Rio de Janeiro através do site ReserveHotéis e pague apenas R\$ 350,00* na diária. Aproveite!
*Promoção válida até 30/09/03

[RESERVE AGORA](#)



Rep. 165 Braz. hotels in Internet and GDS

Three players make 348 hotels online bookable in real-time

reservhotel.com.br → reservehoteis.com.br
(interlinkhotels.com.br) - Hotel rep. company:
165 hotels in Brazil (on web-site)

although: " São mais de 200 hotéis selecionados nas principais cidades do Brasil."
ReservHOTEL International: represents 2120 hotels worldwide.

Major player	Brazil	Worldwide	Brazil %
ReservHOTEL	165	2120	8%
Utell	68	4500	1,5%
Accor Hotels	115	3835	3%
	348		

How important are foreign guests for hotels in Brazil?

Example:

”Foreigners were responsible for 24% of the occupation of Rio de Janeiro state hotels.” (2001)

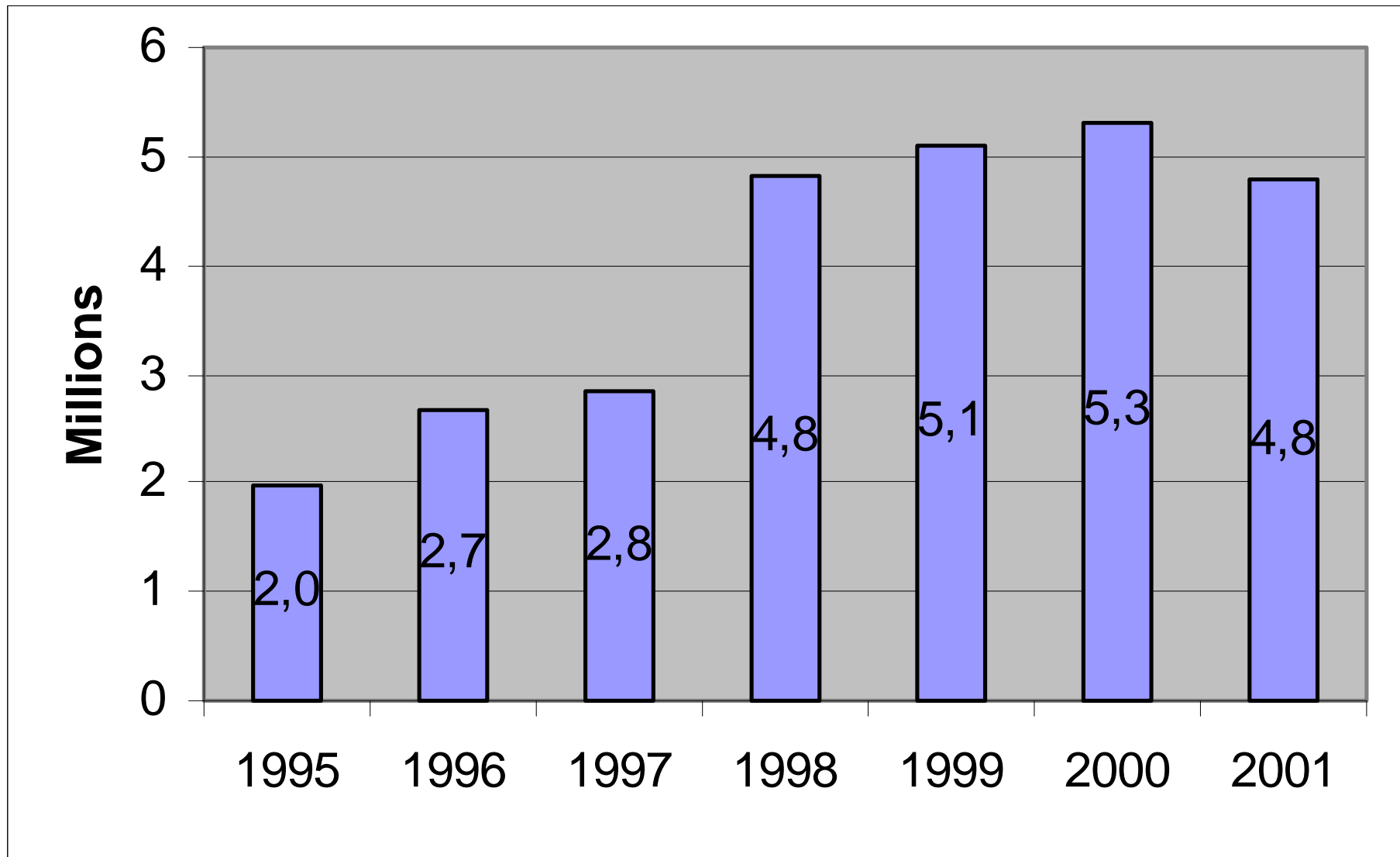
In Rio de Janeiro state there were 2132 hotels, with an average of 69 beds per hotel (vs. 50 in Europe and 140 in the USA).

Source: Study by IBGE,

<http://www.expats.com.br/noticias.php?cod=2209>, February 5, 2002

In Brazil there are more than 10,000 hotels and similar establishments.

International visitor arrivals - Brazil



... of which Argentina: 1.74 or 33% in 2000 and 1.37 or 29% in 2001.

Source: <http://www.brazil.org.uk/>

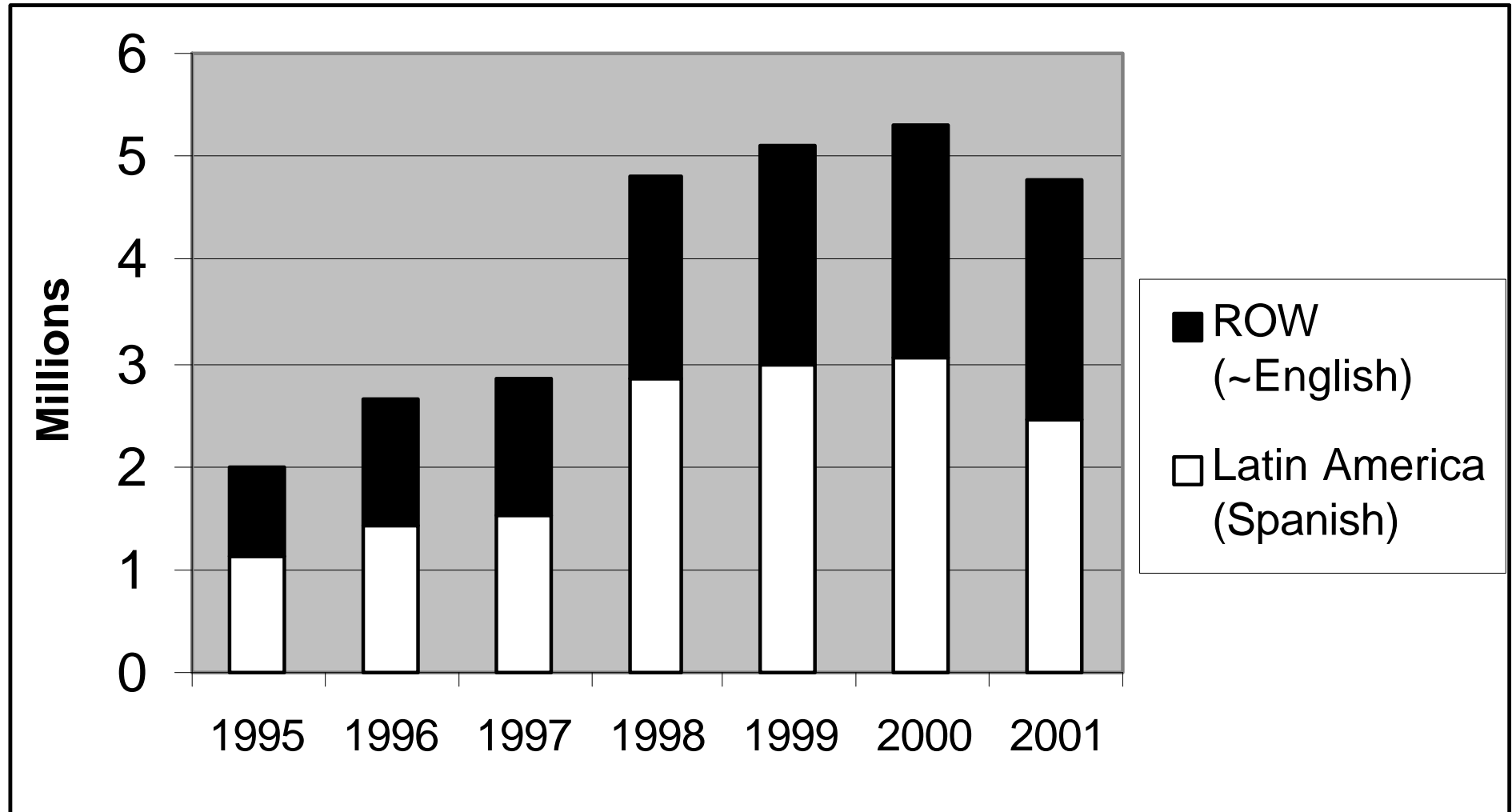
Which should be the first
foreign language version of
website?

Spanish or English?

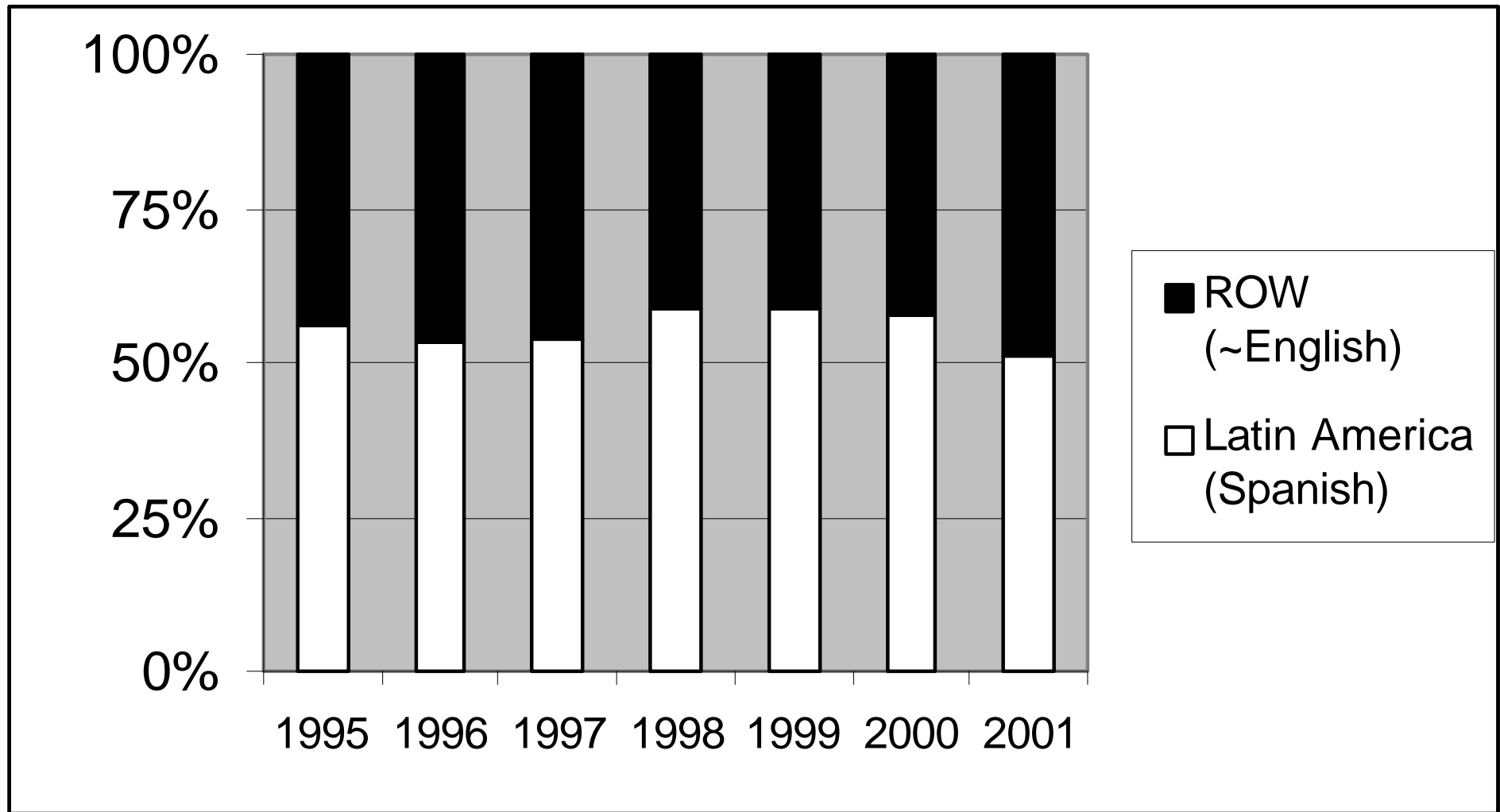
Or will the native
language version do?

Ideally: English AND Spanish,
in addition to native language version.

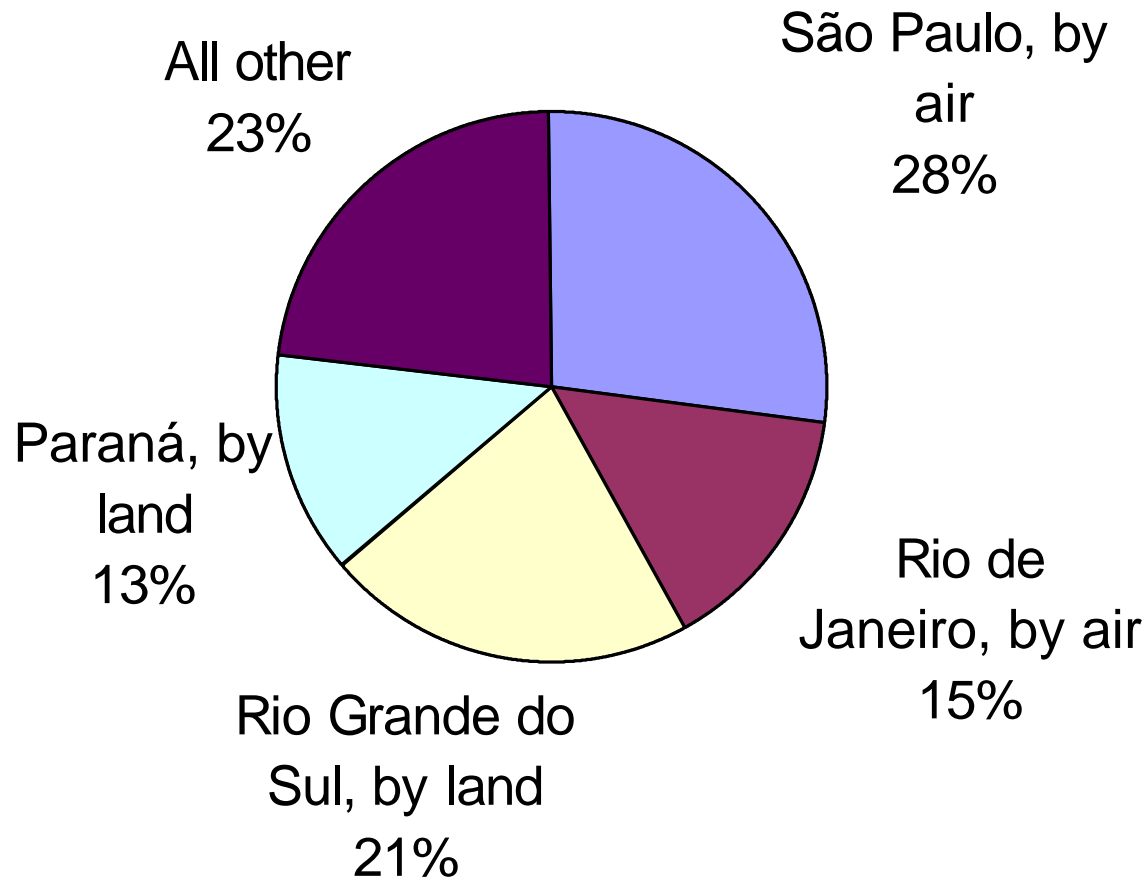
International visitor arrivals - Brazil



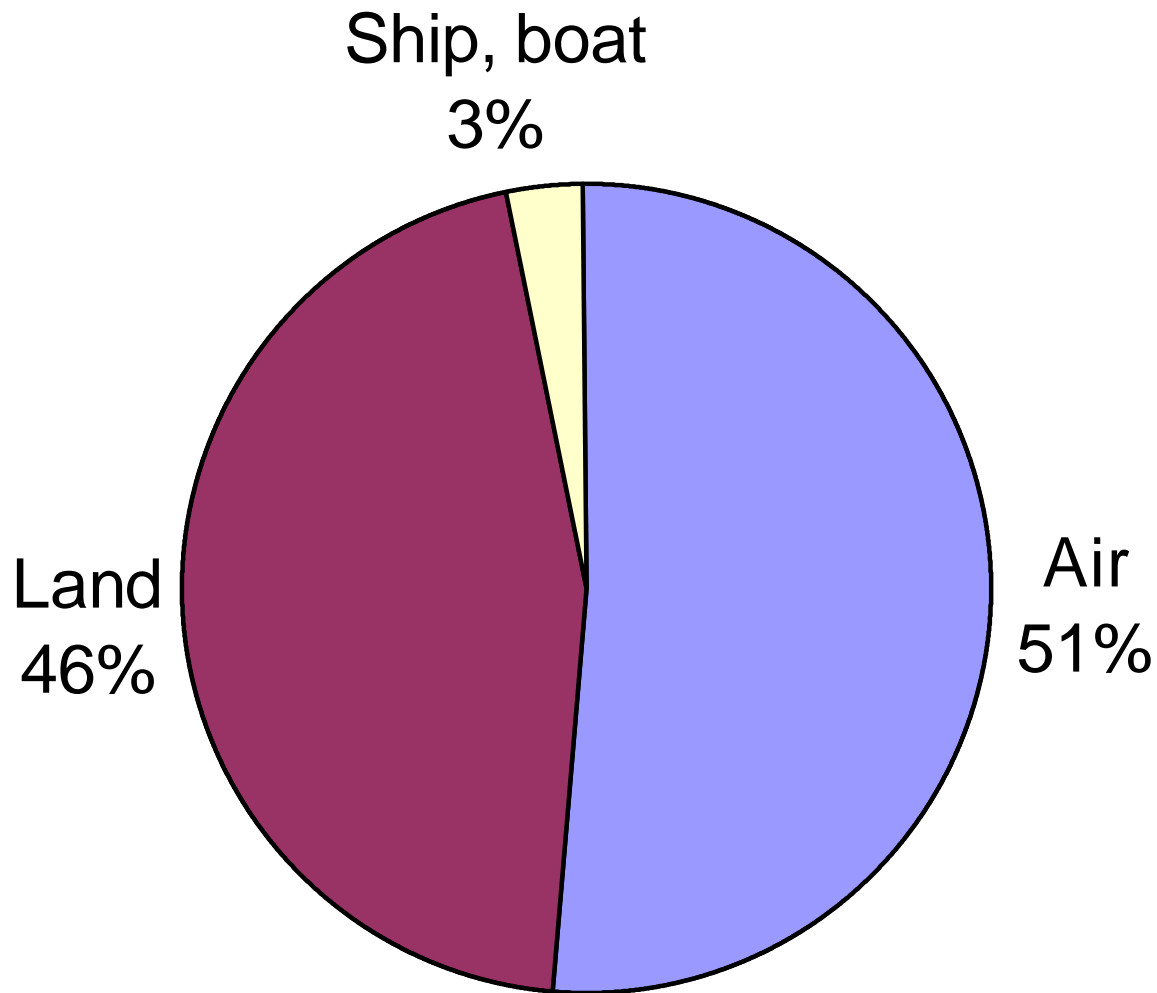
International visitor arrivals - Brazil



How did international visitors enter Brazil (5.3 million - 2000)?



How did international visitors enter Brazil (5.3 million - 2000)?



In some places .. like Buzios .. with many small and independent hotels .. Internet booking on a request basis makes sense

Hotels and inns at
www.buziosonline.com.br/

SUPERIOR - \$\$\$	6
MODERADO - \$\$	35
ECONÔMICO - \$	<u>11</u>
	52

Language versions at
www.buziosonline.com.br/

Portuguese	100%
English	81%
Spanish	25%
French	4%
Italian	2%

Also:

Buziosdirect.com.br: 41 (also Portuguese and English)

Summary

- The USA was ahead of Europe by a factor 4 in 2002, in terms of Internet travel sales in their respective markets, both in absolute and relative terms.
- Airline tickets were the main type of service in both the USA and Europe, followed by hotels.
- In Latin America there were more Internet users than in the four Southern European countries (35 million vs. 31 million).
- Brazil had 14 million Internet users by the end of 2002, almost three times the number in year 2000 (5 million).
- There are probably around 600 - out of a total of 10.000 - hotels in Brazil, which are currently bookable online, in real-time (i.e. with instant confirmation). More than 2.000 hotels in Brazil have got a presence on a website.
- Online booking of travel related services is in an initial stage in Brazil, but there is every reason to believe that it will increase quickly over the next few years.
- For small independent hotels in resorts outside of the main cities it makes sense to consider offering Internet booking on a request basis, for a start.