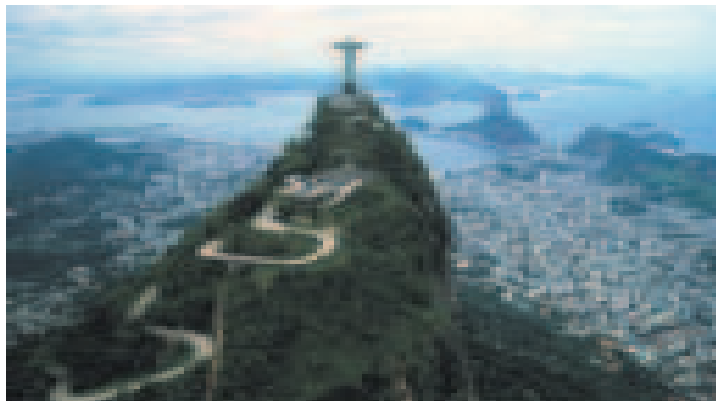


Brazil's uncertainty

Continued economic problems, combined with the events of September 11, have had a mixed effect on the outgoing student market in Brazil, with high school bookings down but university bookings remaining strong.



In contrast to the results of our previous Consultants' Report on Brazil (see *Education Travel Magazine*, issue 4 2001, page 10), the respondents of this survey reported decreasing high school bookings and increased university bookings for 2001.

Economic difficulties, including the devaluation of the Brazilian real and the events of September 11, 2001, were repeatedly given as reasons for any decrease in business experienced by our consultants. The high school market especially seems to have been particularly affected by the terrorist attacks in the USA, as consultants said that younger students were put off travelling overseas due to issues of safety.

However, while country-wide economic problems have been making university education overseas even more expensive for the average Brazilian student, our consultants said that many university students are still keen to pursue their studies overseas as they see it as an investment for their future career prospects, even more important in times of economic uncertainty.

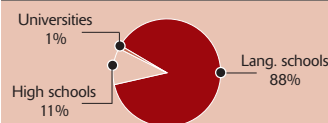
A reflection of the financial difficulties facing many Brazilian students is the change in the top three destinations for university students from last year's survey. Australia moved from third place to second place amid comments from agents that this country was becoming more popular due to its lower costs.

When it came to advising students about where to study, our respondents reported that the advisory process was very important for their students. On average, just 10 per cent of students knew which institution they wanted to study in, 26 per cent knew the city and 63 per cent knew the country.

Key Facts

- 12 consultants took part in our Consultants' Report survey
- Respondents placed a total of 906 students in high schools and universities in 2001
- 32 per cent of respondents' clients required a language course before their education course
- 75 per cent of respondents reported an increase in university bookings in 2001
- 55 per cent of respondents reported a decrease in high school bookings in 2001
- On average, 43 per cent of clients changed their mind about where they wanted to study after being advised by a consultant
- 30 per cent of respondents who placed students in high schools received no commission from schools for their services
- Commission rates varied from 10 to 20 per cent

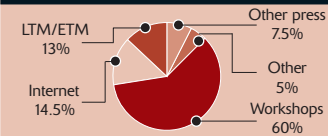
Consultants' business by sector



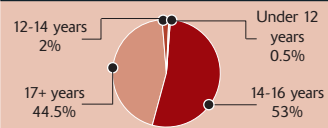
Average growth in consultants' business



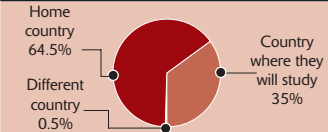
How agencies find new schools and universities



High school placements by age



Where students take language courses



Top three university courses

1. Business
2. Hotel management/hospitality
3. Design

Universities

Top three destinations

1. USA
 2. Australia
 3. Canada
- Average commission: 13%

High schools

Top three destinations

1. USA
 2. New Zealand
 3. Australia
- Average commission: 14%

Participating consultancies:

AF Programas Culturais, Atrium Turismo, AZICS Intercambio Cultural, CI-Central de Intercambio, D. W. Brazil, Ematur Empr. Adm. Turismo, High Connections, Improvement, Integrity Exchange Student Agency, Intercambio Global, PRIDE - Intercambio e Turismo, True Way.

Most frequently mentioned programmes:

High schools: In Australia: Adelaide Dominican School, Adelaide, SA; Narrabeen Sports School, Sydney, NSW. In Canada: Belmont Secondary School, Victoria, BC; West Vancouver School District, Vancouver, BC. In New Zealand: Avondale College, Auckland; Hillmorton High School, Christchurch; Rosehill College, Papakura. In the USA: Adventures in Real Communication, Chagrin Falls, OH; CCI - Center for Cultural Interchange, St Charles, IL. Worldwide: Embassy CES, Study Group.

Universities: In Australia: Griffith University, Nathan, QLD; University of Southern Queensland, Toowoomba, QLD. In Canada: University of Victoria, Victoria, BC. In Spain: Universidad de Barcelona, Barcelona. In Switzerland: Hotel Consult "Cesar Ritz", Le Bouveret; Swiss Hotel Management School, Montreux. In the UK: University of Newcastle, Newcastle. In the USA: University of California, Berkeley, CA; University of Kansas City, Kansas, MO.