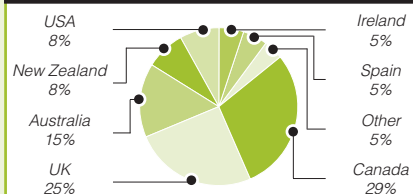


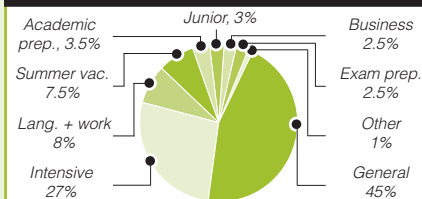
# Brazil back on form

The USA continues to decline in popularity among Brazilian students, according to our survey of agency business trends in Brazil last year. But overall, market growth is good and student confidence regarding outbound travel has returned.

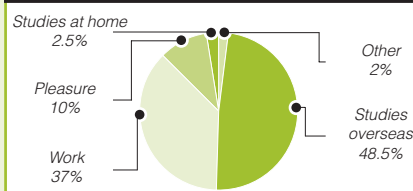
## Top destinations



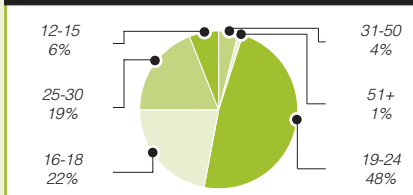
## Most popular courses



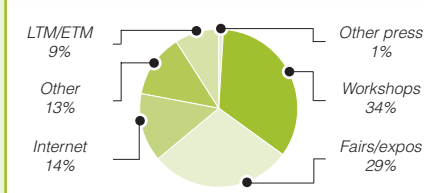
## Reasons for language travel



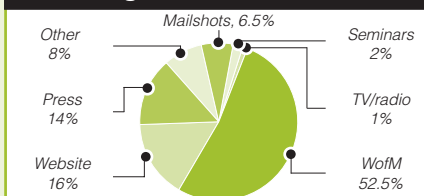
## Age range of clients



## How do agencies find new schools to represent?



## How do agencies recruit students?



## Key points

- The total number of students placed by 14 of the 15 agencies in our survey was 6,699
- Individual agencies placed between 12 and 3,022 students on language courses last year
- Average growth of combined agency business in 2003 was 17 per cent
- The average spend on tuition and accommodation per week was US\$327
- Average length of stay increased to 11 weeks, up from eight weeks in our previous survey
- Only 30 per cent of agencies charged a handling fee, down from 100 per cent in 2002
- Word-of-mouth recommendation accounted for 52 per cent of agency clients
- On average, each agency represented 41 language schools overseas in 14 countries

## Market growth

Brazil is back on form, after a dismal year in 2002, as reported in last year's Agency Survey (see *Language Travel Magazine*, June 2003, pages 12-13). The overall average growth rate of business, recorded across the 15 agencies that took part in our survey, stood at 17 per cent in 2003, with individual agencies recording growth rates as high as 50 or 100 per cent. However, four agencies did register a decrease in business last year. The busy times of the year for Brazilian agencies were during the southern hemisphere's summer – from December to February – and in the month of July.

## Student trends

Continued studies overseas featured far more prominently in this survey as a reason for taking a language course abroad. In our previous survey, just 15 per cent of clients were studying overseas for this reason, while in 2003, the figure was 48 per cent, making it the most important motivating factor among students. The proportion of students in the age range for continued studies overseas, the 19-to-24 year old age range, was higher too, with almost half of all our

respondents' clients falling into this age category last year. The second most important reason to study overseas was for work.

## Course and destination trends

Canada remains the most popular destination while the USA's position has declined further over the past year, dropping from second position in 2002 to joint-fourth position in our 2003 survey. The UK is in number two position, followed by Australia and New Zealand, the latter of which shares its position with the USA. One agency forecast more bookings for Australia and New Zealand in the future. In terms of course trends, general and intensive language programmes continue to ac-

count for the majority of Brazilian bookings, while programmes incorporating work experience remain the third most requested course.

## Agency business

The type of business conducted by the agencies that took part in our survey varies widely, with some agencies sending over 3,000 students per year while others only dealt with 12 individual bookings. Agencies were in agreement, however, regarding the language required by most clients, with English chosen by an overall 84 per cent of clients, followed by Spanish at eight per cent and then other European languages. Agencies estimated that after receiving advice, 50 per cent of clients changed their minds about which country to study in.

## Economic overview

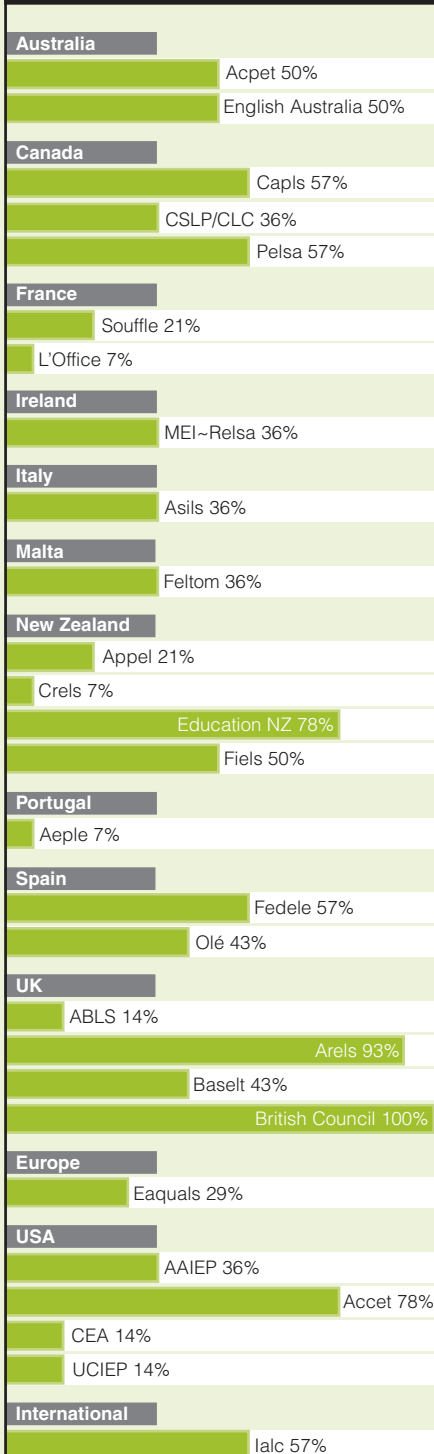
- Brazil's economy declined last year by 0.2%, as interest rates were close to their highest level in four years. President Luiz Inacio Lula da Silva endorsed the interest rate rises in January in a bid to curb inflation. The result was restricted consumer demand and a slow economy.
- The mood seems to have changed already in Brazil, with forecasters confident of a 3.5% growth in GDP this year, although they warn that sustained growth may be harder to achieve. Retail sales rose by 6% in January compared with the previous year.
- The World Bank is optimistic about prospects for the Brazilian economy in 2004, predicting increased exports, mainly due to demand from China and from Argentina, with the economy of the latter country going through recovery.

Source: Bloomberg, Washington Times

## Forecast for 2003

The majority of agencies were positive about business performance in 2004. One agent told *Language Travel Magazine* that he had sold more programmes in the first two months of the year than in six months last year. Confidence in outbound travel is on the up among students, say agents, which in turn fuels their optimism for the future.

## Percentage of agents who recognised each of the following organisations



**Brazilian agents named a range of language programmes they work with, including, in Australia:** HHH Language Centre, Brisbane; International House Queensland, various; Phoenix English Language Academy, Perth; Stratton International College, Brisbane, South Australian Government Schools, Adelaide; **in Canada:** Centre Linguista, Toronto; CLC Hawhorn, Vancouver; Guaraco Exchange Programme, St Catharines; ILAC, Toronto; LSC, various; Languages International, Toronto; LSC, various; Pacific Global Language School, Vancouver; PLI, various; Tamwood International College, various; Saskatchewan Public School Division, Saskatoon; University of Saskatchewan/CSU, Saskatoon; **in France:** Ecole des Roches, Paris; **in Ireland:** Emerald Cultural Institute, Dublin; ISI, Dublin; **in New Zealand:** AUT International House, Auckland; Christchurch College of English, Christchurch; Dominion English Schools, various; **in the UK:** Bell, various; Concord College, Shrewsbury; ELC Bristol, Bristol; Hampstead School of English, London; LIC, Epsom; Malmorn House, London; St. Ann's International College, Bournemouth; St. Giles Colleges, various; Stafford House School of English, Caterbury; Swan School of English, Oxford; **in the USA:** Converse International School of Languages, San Diego; ELC, Santa Barbara, CA; FLS International, Pasadena, CA; MiraX English Institute, various; New England School of English, Boston, MA; Zoni Language Centers, New York, NY; **Worldwide:** Aspect I/A; EF; ELS Language Centers; Gosa; Embassy CES, Springfield.

**Thank you to the following agencies for taking part in our survey:** Britannia International English, Central de Intercambio, Circuito Mundial Intercambio e Cursos no Exterior, Embarque Turismo, Exel Turismo, ICL, Improvement, Kangaroo Tours, MA Intercambio & Turismo, Mainhos de Vento Turismo, Mundo-Brasil/Canada-Brasil/Exchange Programmes, Pressio, True Way, SIC Travel Agency.