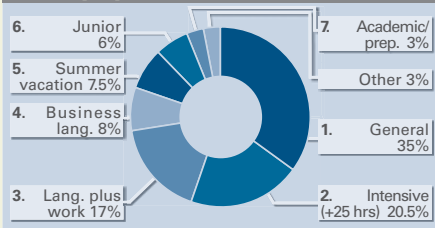


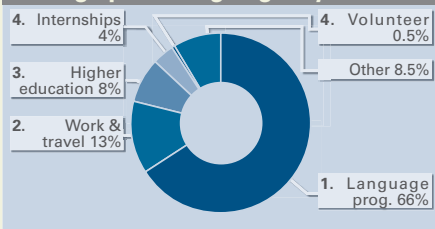
Brazil's bias

Brazilian students clearly favour North America when considering where to study English, while higher education placements are also increasingly sought after.

Most popular courses



Average percentage agency business

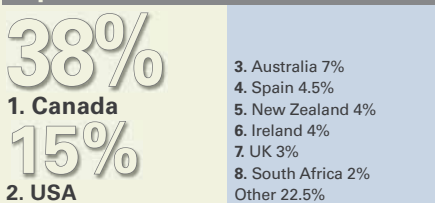


Economic overview

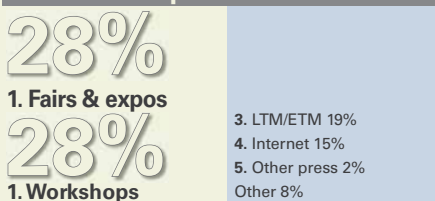
- Brazil's economy has been performing outstandingly, with economic growth improving from an average of 1.6 per cent between 1990 and 2004 to an average since then of 4.4 per cent.
- In the first quarter of 2008, economic growth expanded by 5.8 per cent compared with the same period in 2007. There are fears that inflation will creep upwards, largely because of rising food prices, and it stood at 5.8 per cent to year-end May 2008.
- The longer-term forecast for economic growth from 2008 to 2012 is an average of 4.1 per cent; slightly less than in 2004-2007, but enough to allow real incomes to rise in the forecast period.

Source: FT.com; Economist.com.

Top destinations



How do agencies find new schools to represent?



Market growth

With an impressive 26 agencies from Brazil taking part in this issue's Agency Survey of Brazil, it seems that the overwhelming consensus is that business is buoyant, as only two agencies reported a decrease in business in the last year and four said business was on an even keel. All others reported a hike in business, of between 10 and 50 per cent. The overall average growth rate recorded was a very good 28 per cent. Some agencies mentioned exciting plans ahead, such as launching programmes in China or opening a new office. A number of respondents signalled the favourable economic climate in Brazil.

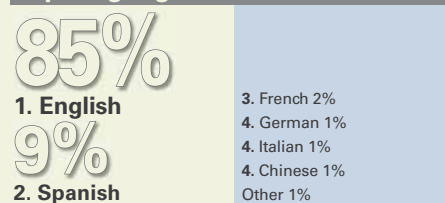
Language and destination trends

English remains the mainstay of the market, responsible for 85 per cent of language course bookings, with Spanish a clear second favourite (and Argentina signalled as a destination as well as Spain). Since our last survey (see LTM, December 2007, pages 14-15), Canada's market share has improved slightly, up from 36 per cent to 38 per cent, while the UK has notably plummeted down the league table, down from second position last year to sixth this year. The USA and Australia remained in order in terms of popularity, with twice as many students opting for the USA as for Australia. In fact, other than the UK's decline, little other change was noted, except for the emergence of South Africa as a new destination request.

Student and course trends

Current or future work was the dominant reason for agency clients to request

Top languages



How do agencies recruit students?



Key points

- The total number of students placed by 25 of the 26 agencies in our survey was **11,502** (one declined to reveal client numbers)
- Individual agencies placed between **8** and **8,000** students on language courses each year
- Average business growth was **28 per cent**
- The average length of stay for Brazilian students was **nine weeks**
- **Three-quarters** of agencies charged clients a handling/processing fee (most typical fee was US\$100)
- **Canada** remained the most popular destination for Brazilian students while the UK lost market share
- In the last 12 months, agencies had worked with an average of **50 language schools** each

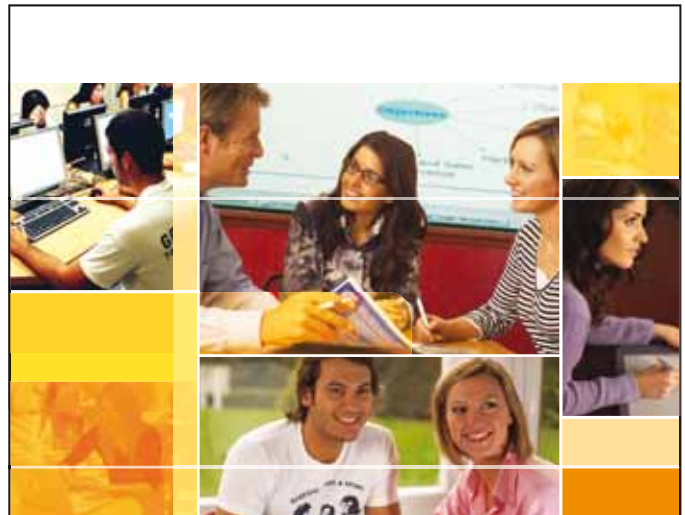
language courses abroad; and they were most likely to find out about an agency by word-of-mouth recommendation, followed by an agency's website (18 per cent). This latter figure is quite low compared with other markets, for example, Korea, where 37 per cent of clients are recruited via an agency's website (see LTM, August 2008, pages 18-19). Mail shots were the third most useful marketing method to attract clients. General and intensive language programmes remained the most popular request among agency clientele followed by language courses with a work placement element.

Agency business

We asked agencies about other aspects of their business, and work & travel programmes were the second biggest business sector (13 per cent overall) after language programmes (66 per cent). Higher education placements are rising in importance; they accounted for 0.5 per cent of placements in our previous survey yet eight per cent this year. In order to find new partners, agencies relied on fairs & expos and workshops as the main conduits to new business relationships, followed by contact via *Language Travel Magazine* or *Education Travel Magazine*. On average, agencies had agreements with 51 educators.

Looking ahead

There is certainly optimism among Brazilian agencies – many pointed to the strong economy and favourable exchange rates as factors likely to boost business further in 2009. Typical expectations were for between 10 per cent and a bullish 40 per cent growth next year!



Hand picked from the best English language schools

Canada

- Access International English Language Centre, Toronto
- East Coast School of Languages, Halifax
- Vancouver English Centre

Ireland

- ATC Language and Travel, Bray, Dublin
- Cork English College
- The Linguaviva Centre, Dublin

Malta

- Clubclass Residential Language School
- Global Village English Centre

New Zealand

- Auckland English Academy
- Languages International, Auckland and Christchurch
- Rotorua English Language Academy (RELA)

South Africa

- Interlink School of Languages, Cape Town

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English

QE events for Agents 2008

- QE invites agents in the Ukraine to meet the QE schools on **7th October in Kiev**
- QE invites agents in Poland to meet the QE schools on **9th October in Warsaw**

For further information: agents@quality-english.com

Agents can be sure of

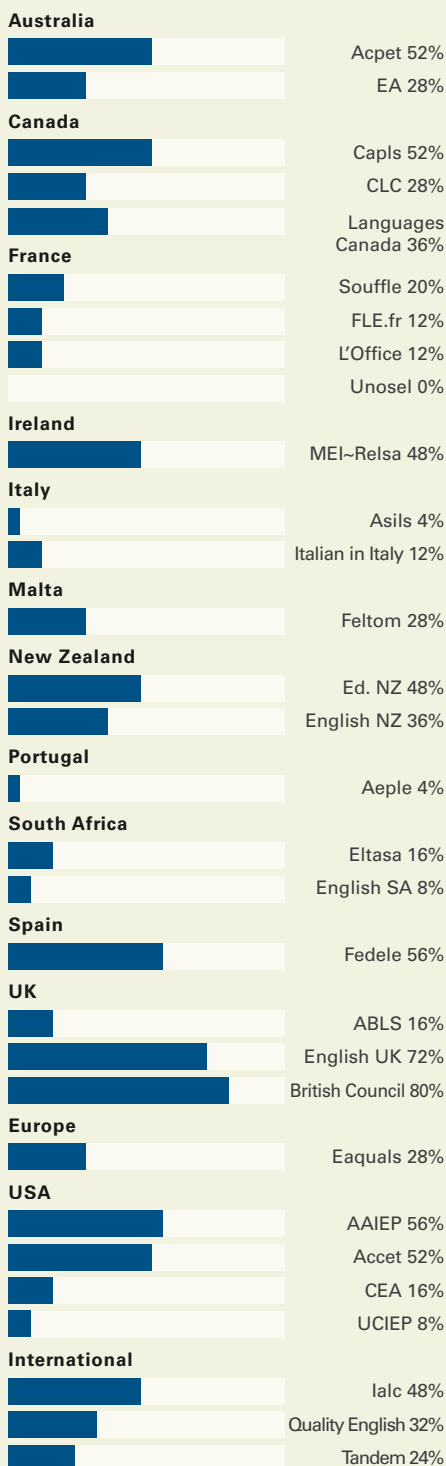
- a fast and flexible response
- a strong partnership with the decision-makers
- a commitment to individual service and attention

www.quality-english.com



Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations



Brazilian agents named a range of language programmes they work with, including, in Australia: ACE, various; Australian Language Schools, Brisbane, QLD; Geos Oceania, various; Sarina Russo School, Brisbane, QLD; PICE, Perth; OIBA, Gold Coast, QLD; in Canada: Ialc, various; Omnicon Schools, Toronto, ONT; PLI, various; KGC, Vancouver/Toronto; Pacific Gateway International College, various; Hansa Language Centre, Toronto, ONT; British Columbia College, Vancouver, BC; Global Village, Vancouver, BC; Bodwell Language School, Vancouver, BC; LSC, various; School District #73, Kamloops, BC; Tamwood International College, various; Vancouver English Centre, Vancouver, BC; in France: France Language, Paris; in the USA: EC Boston, Boston, MA; ELS, various; NESE, Boston, MA; IH-San Diego, San Diego, CA; University of Delaware, Newark, DE; University of California, Irvine, CA; in Ireland: CES Swandean, Dublin; ISI Ireland, Dublin; Emerald Cultural Institute, Dublin; Swan Training Institute, Dublin; in New Zealand: Dynaspeak, Auckland; Rural Exchange NZ, Clarkville; in China: Beijing University, Beijing; in the UK: Angle-Continental, Bournemouth; Bell International, various; Bloomsbury International, London; East London School of English, London; ELC Bristol, Bristol; Hampstead School of English, London; Malvern House, London; Milner School, London; Worldwide: Embassy CES; Eurocentres; Kaplan Aspect; Geos; LAL

Thank you to the following agencies for taking part in our survey: 2001 Travel; Azies Intercambio Cultural; Britannia International English; CI; Ciete Intercambio; DMP Intercambio; Esquema International; Griffe Viagens; High Connections; IEP Brazil; Interclubs; Kenigaro Education; Liguria Turismo; Moirhotur; NR Intercambio; Number One Intercambio; Prida Viagens e Turismo; SIC Travel Agency Brazil; Study N Travel; Trek Viagens e Intercambio; Trends & Business - LCCI Brasil; Upward Study Abroad and Travel; US Education & MBA Consulting; Via Mundo Intercambio e Turismo; Wes Brazil Worldwide Education Services; Yazigi Travel.