

# MARKET RESEARCH BELTA SEAL - 2018

## PRODUCTION

Mobilidade Acadêmica

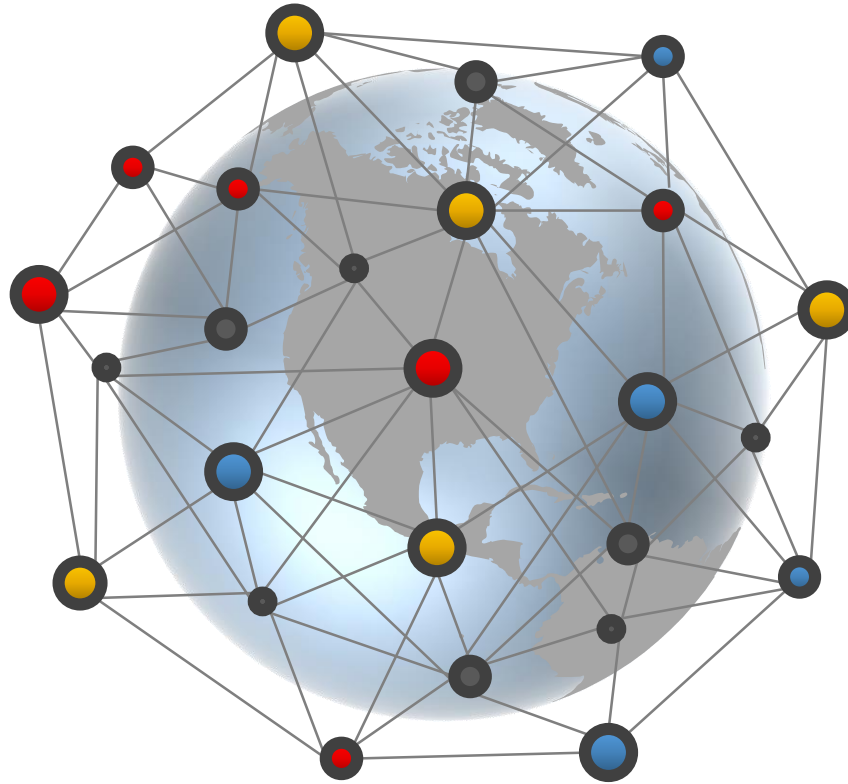
a via acadêmica internacional



## SPONSORSHIP



# Belta Seal Research- Agencies



**Development team**  
Manolita Correia Lima  
Danilo Torini  
Claudia Silva



# Methodology

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- **Type of research:** quantitative;
- **Target audience:** managers of international education agencies' and agencies' network, franchisees, supervisors, managers, owners or representatives of study abroad brands;
- **Tool for data collection:** online questionnaire;
- **Strategy for data collection:** invitations sent by email and phone;
- **Time span:** December 2017 to March 2018;
- **Extent:** national (Brazil);
- **Listing:** Supplied by Belta;



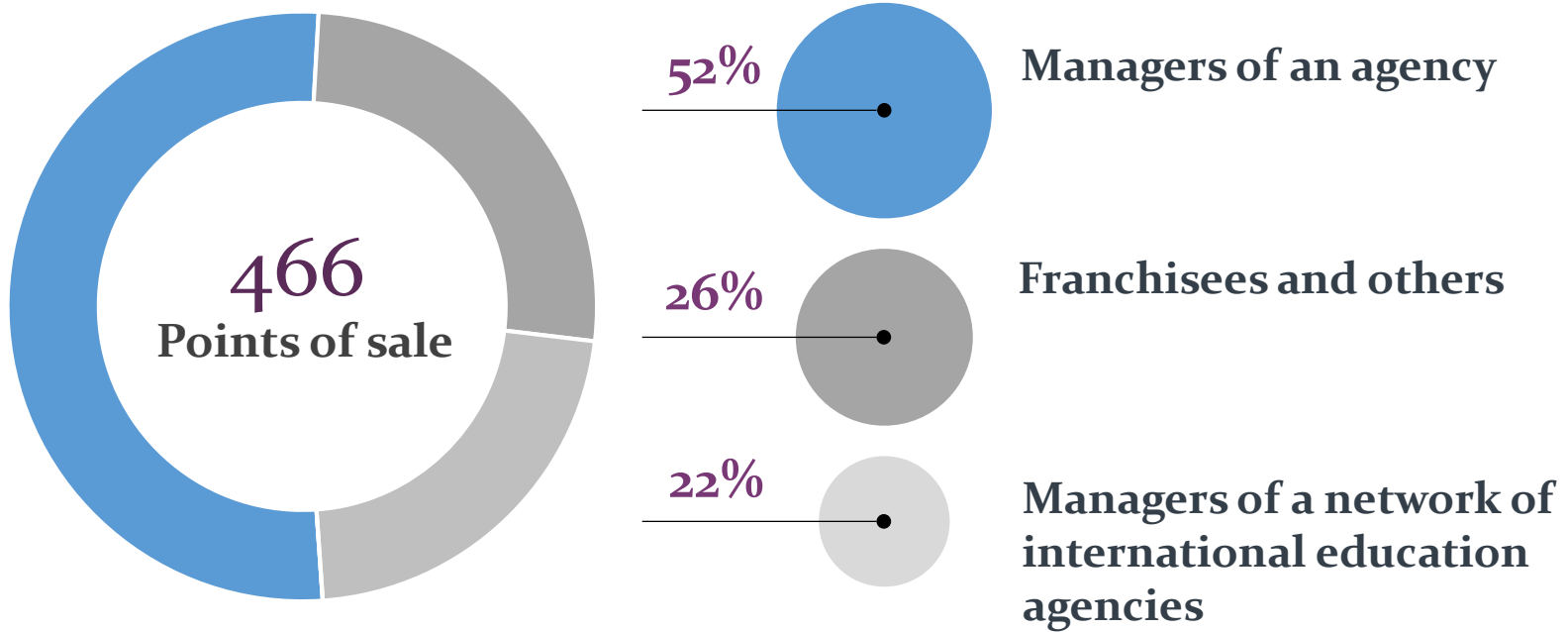
# Methodology

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- **Rankings** were the main tool used for most of the questions in this research, according to which a grade was assigned to each response according to the position attributed to the items by the respondent (*E.g.: 1st place: 20 pts; 2nd place: 19 pts; ....; 20th place: 1 pt*).
- It is a resource that guarantees greater **accuracy of information** and **refinement of analysis**
- This methodology is appropriate for **longitudinal comparative studies** (researches within a time span).

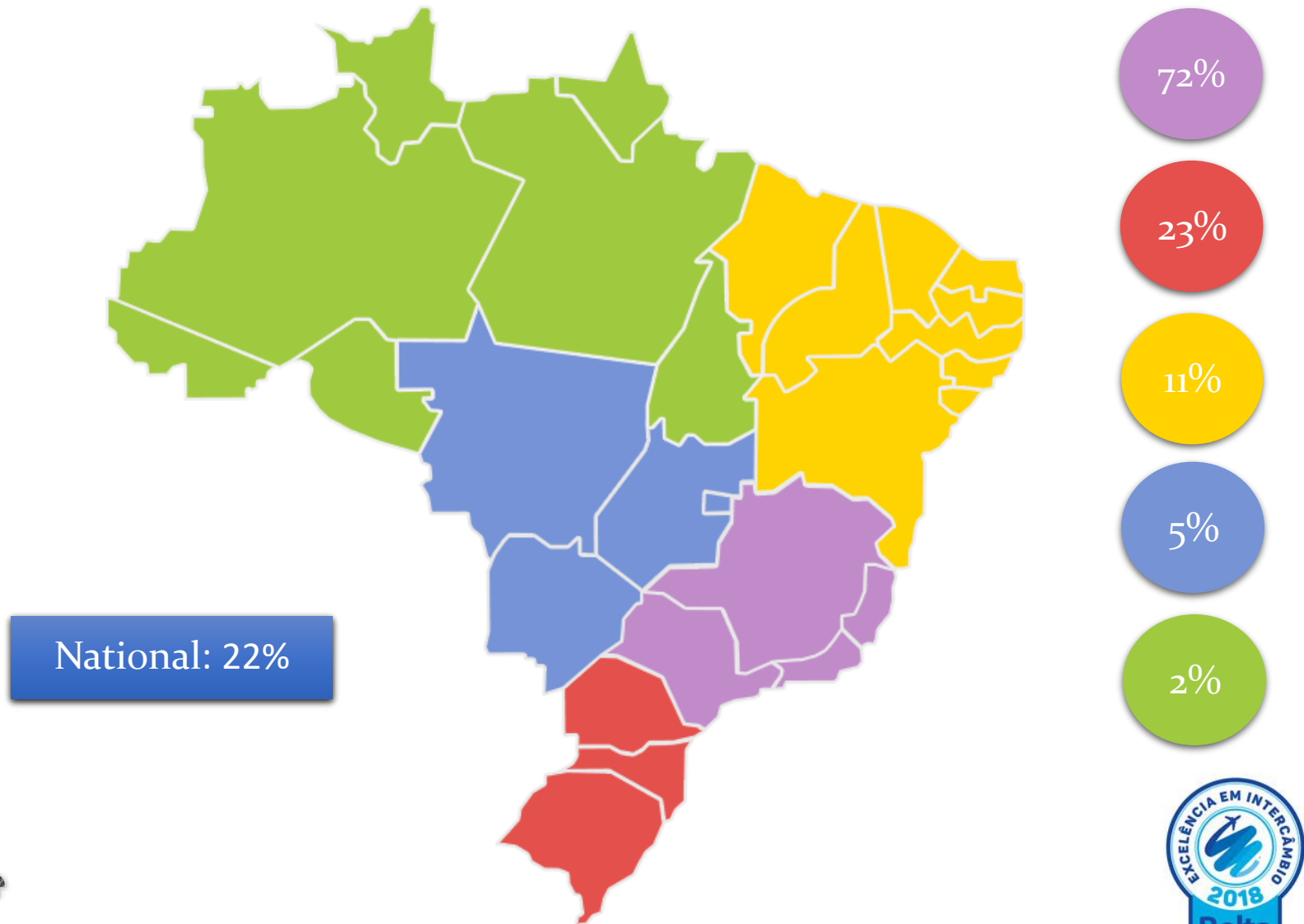


# Sample (agencies)



Total of participators:  
440 Belta and 26 Non-Belta.

# Regional Distribution



The sum is higher than 100% because some agencies are present in more than one region.

# Regional Distribution

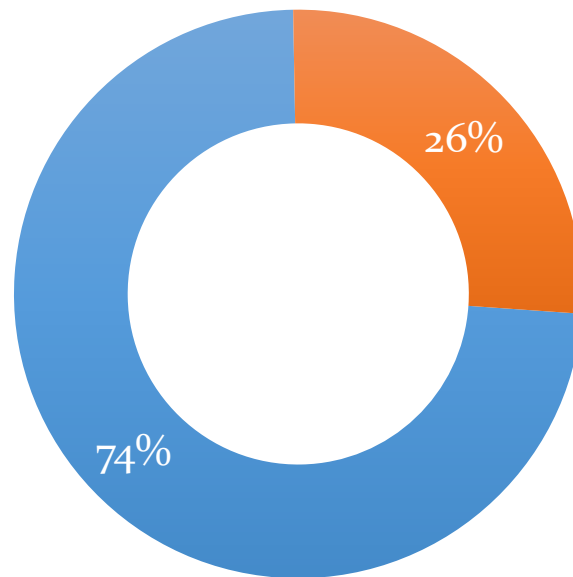
Position	State	Percentage
1st	São Paulo	51%
2nd	Parana	15%
3rd	Rio de Janeiro	12%
4th	Minas Gerais	6%
5th	Rio Grande do Sul	6%
6th	Bahia	4%
7th	Pernambuco	4%
8th	Espirito Santo	3%
9th	Distrito Federal	2%
10th	Santa Catarina	2%
11th	Goiania	2%
12th	Alagoas	1%
13th	Amazonas	1%
14th	Ceara	1%
15th	Maranhao	1%
16th	Mato Grosso do Sul	1%
17th	Roraima	1%

National: 22%



# Sample (agencies)

Gender of the respondents



■ Female ■ Male



# Main products sold

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- 1** Language course
- 2** Language course with temporary work
- 3** Teen's vacation programme (summer/ winter)
- 4** Professional course, Certificate or diploma
- 5** High School
- 6** Undergraduate courses
- 7** Volunteer work
- 8** Internship / work experience
- 9** Graduation (*Masters* or MBA)
- 10** Postgraduate academic courses (*Masters* or PhD)

# Main products sold

	Position	Position	Position	Product	Score
	2017	2016	2015		
	1st	1st	1st	Language course	6866
	2nd	2nd	4th	Language course w. temporary work	6807
	3rd	3rd	3rd	Teen's summer/ winter Programmes	5861
↑	4th	5th	5th	Professional course, certificate or diploma	5709
	5th	4th	2nd	High school	4363
↑	6th	7th	8th	Undergraduate courses	3880
	7th	9th	7th	Volunteer Work	3867
↑	8th	10th	10th	Internship (work experience)	3494
	9th	8th	9th	Graduation courses (including MBA)	2174
↑	10th	12th	11th	Post-grad academic courses(Masters or PhD)	1663
	11th	6th	6th	Work in the USA (vacation work)	1634
	12th	11th	12th	Cultural tourism	1557
	13th	13th	13th	Academic Events	643
	14th	14th	14th	Corporate events	539

Q2. List, in order of importance, the main products sold by your agency in 2017



# Main products sold (by Belta's coordination)

## North/ Northeast

2017	Products
1st	Language course
2nd	Language course with temporary work
3rd	Teens' vacation courses(summer/winter)
4th	Professional course, diploma or certificate
5th	High School
6th	Undergraduate
7th	Volunteer work
8th	Internship (work experience)
9th	Graduate level courses (MBA or Masters)
10th	Postgraduate academic courses (Master's or PhD)
11th	Work in the US (vacation work)
12th	Cultural Tourism
13th	Academic events
14th	Corporate Events

## Pernambuco/Bahia

2017	Products
1st	Language Courses
2nd	Language courses with Temporary work
3rd	Professional course, diploma or certificate
4th	Graduate level courses (MBA or Masters)
5th	Undergraduate
6th	Postgraduate academic courses (Master's or PhD)
7th	Teens' vacation courses(summer/winter)
8th	Volunteer work
9th	High School
10th	Internship (work experience)
11th	Work in the US (vacation work)
12th	Academic events
13th	Corporate Events
14th	Cultural Tourism

Q2. Number, in order of importance, the main products sold by your agency in 2017



# Main products sold (by Belta's coordination)

## Minas Gerais

2017	Products
1st	Language Courses
2nd	Language courses with temporary work
3rd	High School
4th	Teens' vacation courses(summer/winter)
5th	Professional courses, diploma or certificate
6th	Undergraduate
7th	Volunteer work
8th	Graduate level courses (MBA or Masters)
9th	Internship (work experience)
10th	Postgraduate academic courses (Master's or PhD)
11th	Work in the USA (vacation work)
12th	Cultural tourism
13th	Academic events
14th	Corporate events

## Rio de Janeiro

2017	Products
1st	Language Courses
2nd	Language courses with temporary work
3rd	Professional courses, diploma or certificate
4th	Teens' vacation courses(summer/winter)
5th	High School
6th	Volunteer work
7th	Cultural tourism
8th	Internship (work experience)
9th	Undergraduate
10th	Postgraduate academic courses (Master's or PhD)
11th	Graduate level courses (MBA or Masters)
12th	Work in the USA (vacation work)
13th	Corporate events
14 <sup>th</sup>	Academic events

Q2. Number, in order of importance, the main products sold by your agency in 2017



# Main products sold (by Belta's coordination)

## Parana/ Santa Catarina

2017	Products
1st	Language course
2nd	Professional courses certificates or diploma
3rd	High School
4th	Language course with temporary work
5th	Teens' vacation courses(summer/winter)
6th	Internship (work experience)
7th	Undergraduate
8th	Cultural tourism
9th	Graduate level courses (MBA or Masters)
10th	Corporate events
11th	Postgraduate academic courses (Master's or PhD)
12th	Academic Events
13th	Work in the USA (vacation work)
14th	Volunteer work

## Rio Grande do Sul

2017	Products
1st	Language course
2nd	Teens' vacation courses(summer/winter)
3rd	Professional courses certificates or diploma
4th	High School
5th	Graduate level courses (MBA or Masters)
6th	Undergraduate
7th	Postgraduate academic courses (Master's or PhD)
8th	Language course with temporary work
9th	Volunteer work
10th	Cultural tourism
11th	Internship (work experience)
12th	Work in the USA (vacation work)
13th	Corporate events
14º	Academic Events

Q2. Number, in order of importance, the main products sold by your agency in 2017



# Main services sold

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- 1** Travel health insurance
- 2** Visa assistance
- 3** Issuance of air tickets
- 4** Currency exchange operations
- 5** Accommodation booking

# Main services sold

Position 2017	Position 2016	Position 2015	Service	Score
1st	1st	1st	Travel health insurance	3341
2nd	3rd	2nd	Visa assistance	3190
3rd	2nd	3rd	Issuance of air tickets	2377
4th	4th	4th	Currency exchange operations	1977
5th	5th	5th	Accommodation booking	929

# Main services sold (by Belta coordination)

## North/Northeast

2017	Services
1st	Travel health insurance
2nd	Visa assistance
3rd	Issuance of air tickets
4th	Currency exchange operation
5th	Accommodation booking

## Pernambuco/Bahia

2017	Services
1st	Travel health insurance
2nd	Visa assistance
3rd	Accommodation booking
4th	Issuance of air tickets
5th	Currency exchange operation

## Minas Gerais

2017	Services
1st	Issuance of air tickets
2nd	Travel health insurance
3rd	Visa assistance
4th	Currency exchange operation
5th	Accommodation booking

## Rio de Janeiro

2017	Services
1st	Travel health insurance
2nd	Currency exchange operation
3rd	Issuance of air tickets
4th	Visa assistance
5th	Accommodation booking

## Parana/Santa Catarina

2017	Services
1st	Travel health insurance
2nd	Issuance of air tickets
3rd	Visa assistance
4th	Accommodation booking
5th	Currency exchange operation

## Rio Grande do Sul

2017	Services
1st	Travel health insurance
2nd	Issuance of air tickets
3rd	Currency exchange operation
4th	Visa assistance
5th	Accommodation booking



Q2. Number, in order of importance, the main services sold by your agency in 2017



# Main destinations



- 1º Canada
- 2º The USA
- 3º United Kingdom
- 4º Australia
- 5º Ireland
- 6º New Zealand

# Main destinations

Position 2017	Position 2016	Position 2015	Country	Score 2017
1st	1 <sup>st</sup>	1 <sup>st</sup>	Canada	9194
2nd	2 <sup>nd</sup>	2 <sup>nd</sup>	United States	8638
3rd	5 <sup>th</sup>	5 <sup>th</sup>	United Kingdom	7742
4th	3 <sup>rd</sup>	3 <sup>rd</sup>	Australia	7654
5th	4 <sup>th</sup>	4 <sup>th</sup>	Ireland	6602
6th	6 <sup>th</sup>	6 <sup>th</sup>	New Zealand	6356
7th	7 <sup>th</sup>	7 <sup>th</sup>	Malta	6085
8th	8 <sup>th</sup>	8 <sup>th</sup>	South Africa	5571
9th	9 <sup>th</sup>	10 <sup>th</sup>	Spain	4132
10th	10 <sup>th</sup>	9 <sup>th</sup>	France	3474
11th	13 <sup>th</sup>	13 <sup>th</sup>	Argentina	2841
12th	12 <sup>th</sup>	12 <sup>th</sup>	Italy	2575
13th	11 <sup>th</sup>	11 <sup>th</sup>	Germany	2227
14th	14 <sup>th</sup>	14 <sup>th</sup>	Chile	1077
15th	21 <sup>st</sup>	18 <sup>th</sup>	Colombia	550
16th	20 <sup>th</sup>	17 <sup>th</sup>	Belgium	489



Canada was placed in the **top 3** at least **98%** of the times it was mentioned.

The United States were placed in the **top 3** **85%** of the times they were mentioned.

82% answered Canada in **1st place** and 15% in 2nd place

2% mentioned the USA in **1st place** and 69% in 2nd place.

In total, **36 countries** were mentioned

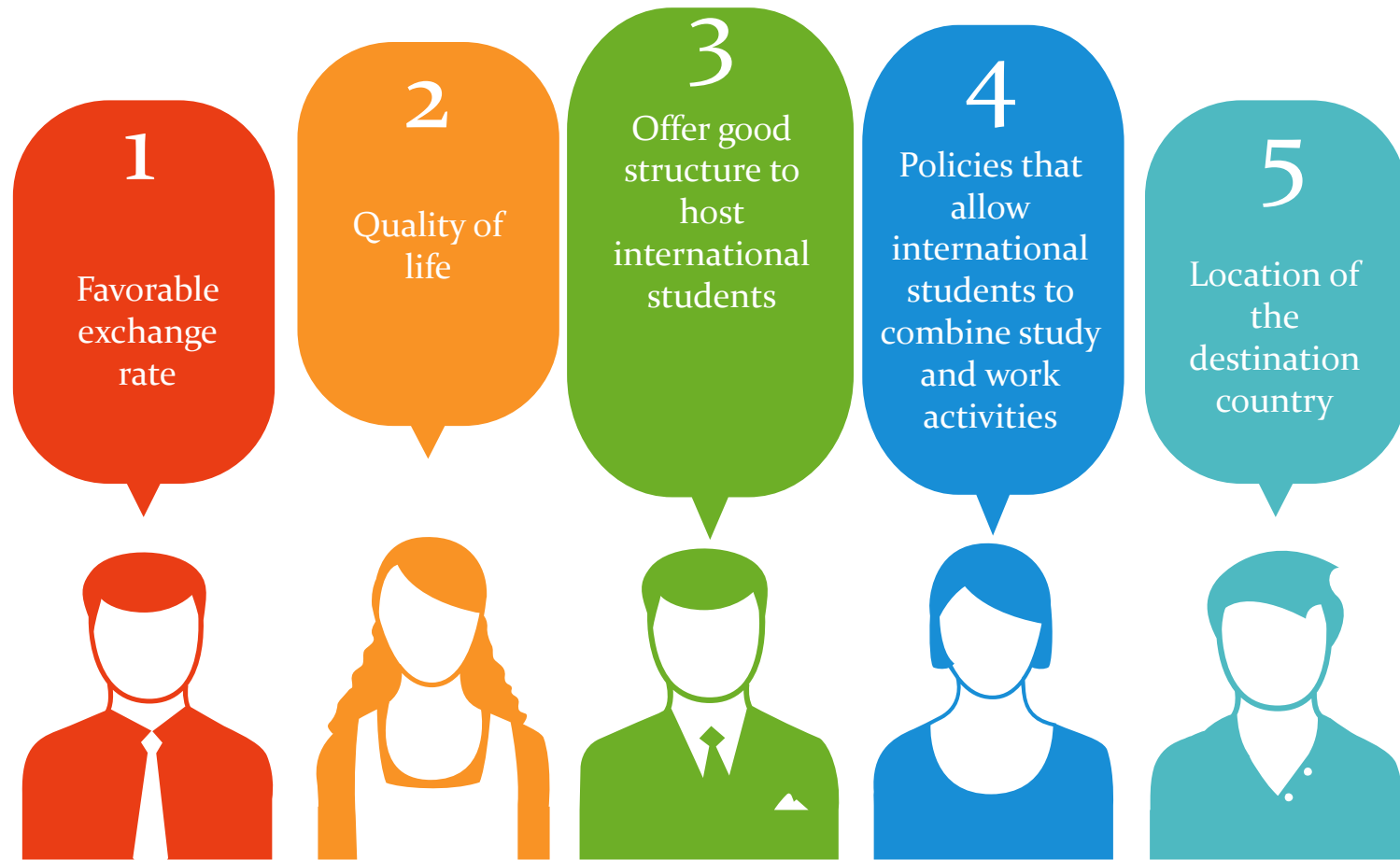


# Main destinations

## Other countries mentioned:

Position 2017	Country	Score 2017
17th	Costa Rica	420
18th	United Arab Emirates	377
19th	Mexico	324
20th	Norway	240
21st	Panama	180
22nd	Japan	123
23rd	Sweden	60
24th	Austria	49
25th	India	27
26th	Switzerland	23
27th	Netherlands	20
28th	Dominican Republic	15
29th	Peru	9
	Denmark	9
	Afeganistan	9
32nd	China	6
	Singapore	6
34th	South Korea	3
	Cuba	3
36th	Luxembourg	1

# Main motivations for the country choice



Q5. Point in order of importance the five aspects that most influenced your clients to choose these countries



# Main motivation for the country choice

Position 2017	Position 2016	Position 2015	Aspects	Score (2017)
1st	1st	1st	Favorable Exchange rate	1558
2nd	2nd	3rd	Quality of life	1337
3rd	4th	7th	Offer good structure to host international students	850
4th	3rd	2nd	Polices that allow international students to combine study and work activities	769
5th	9th	6th	Location of the destination country	706
6th	7th	4th	English speaking country	612
7th	5th	5th	Easy in the visa process	535
8th	10th	10th	public security	357
9th	6th		possibility to stay in the country to work after finishing the studies	243
10th	8th	5th	Recommendation from friends and family	175
11th	11th	9th	Touristic attractions	175
12th	13th	8th	Good climate for Brazilians	80
13th	12th		Pathways to start other study programmes after an English course	16
14th	14th	11th	Presence of family or friends	3

**69%** mentioned favorable exchange rate and **49%** mentioned life quality in their **Top 3** motivations



Q5. Point in order of importance the five aspects that most influenced your clients to choose these countries

# Age group of clients who went abroad in 2017

- 1 22 to 24 years old
- 2 18 to 21 years old
- 3 15 to 17 years old
- 4 25 to 29 years old
- 5 30 to 39 years old

# Age group of clients who went abroad in 2017

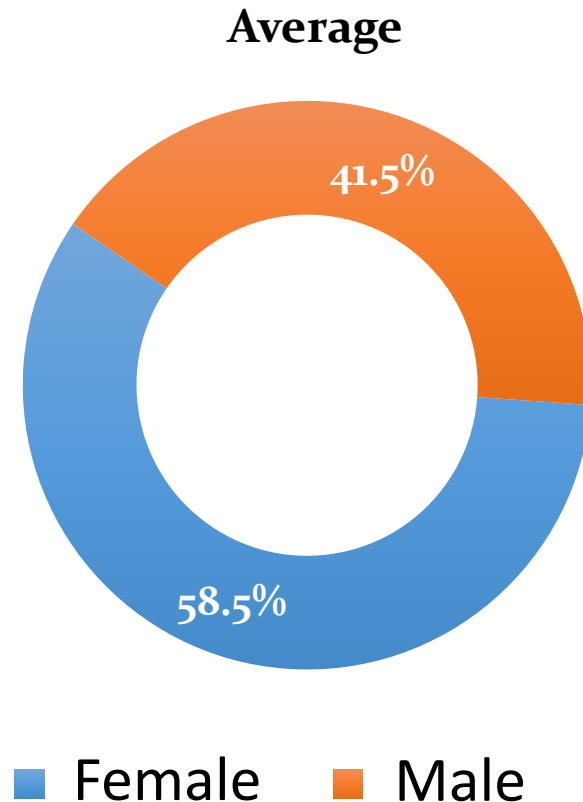
Position 2017	Position 2016	Position 2015	Age group	Score 2017
↑ 1st	2nd	1st	22 to 24 years old	2972
↑ 2nd	3rd	3rd	18 to 21 years old	2891
↑ 3rd	5th	4th	15 to 17 years old	2408
↓ 4th	1st	2nd	25 to 29 years old	2320
5th	4th	5th	30 to 39 years old	2264
6th	6th	6th	40 to 49 years old	1920
7th	8th	7th	Under 15 years old	1614
8th	7th	8th	50 to 59 years old	1604
9th	9th	9th	60 years old or over	1552

Mentioned in the top 3:  
 15 to 17 y.o: 21,2%  
 18 to 21 y.o: 27,3%  
 22 to 24 y.o: 31,4%  
 25 to 29 y.o: 20,1%



Q6. List, in order of importance the age group of the clients who travelled through your agency in 2017.

# Gender of the clients who travelled in 2017

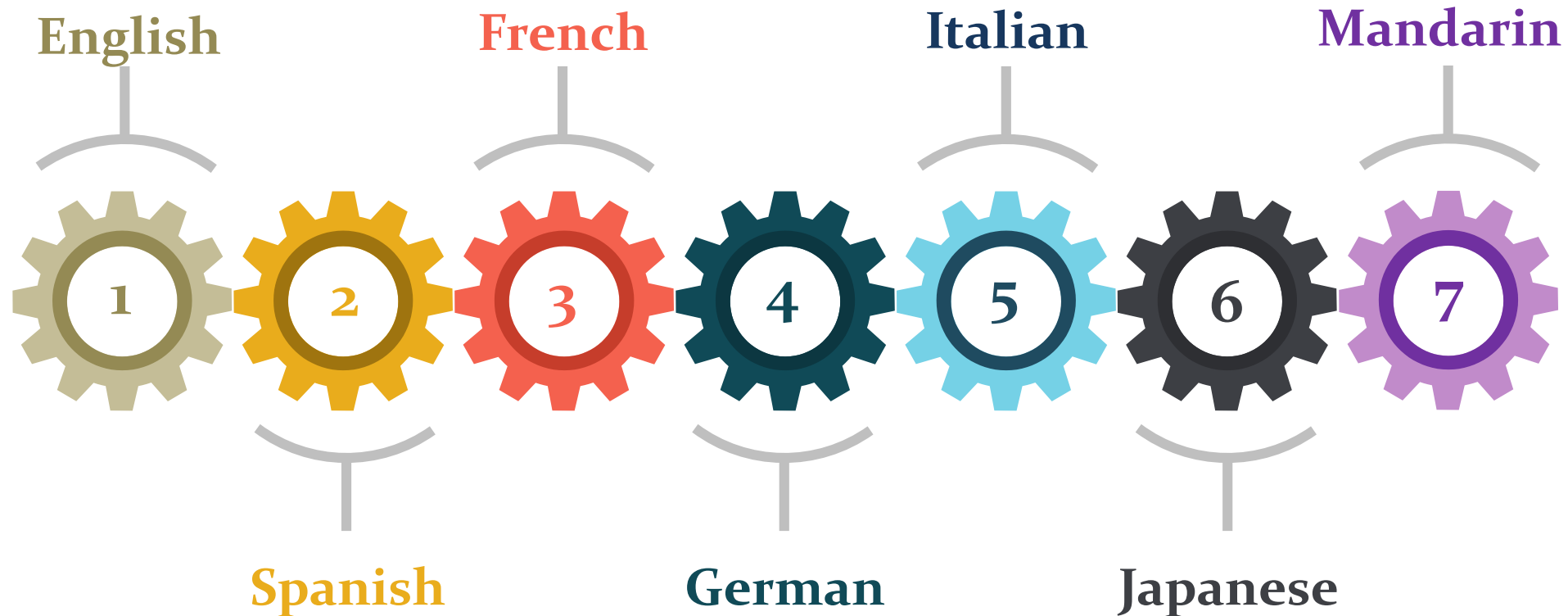


Q.6b. What was the approximate percentage of clients by gender in 2017?





# Language of the marketed courses



Q7. List, in order of importance, the languages for which your agency marketed courses in 2017.



# Language of the marketed courses

67% answered  
"English" in  
the 1st place

Position 2017	Position 2016	Position 2015	Languages	Score
1st	1st	1st	<b>English</b>	<b>2359</b>
2nd	2nd	2nd	<b>Spanish</b>	<b>1867</b>
3rd	3rd	3rd	<b>French</b>	<b>1734</b>
4th	4th	4th	<b>German</b>	<b>1667</b>
5th	5th	5th	<b>Italian</b>	<b>1312</b>
6th	6th	6th	<b>Japanese</b>	<b>1255</b>
7th	7th	7th	<b>Mandarin</b>	<b>1089</b>

41% answered  
"Spanish"  
among the  
top 3 and 39%  
in 2nd place

Although English is the main option, the overall score is more scattered than it was in 2016 and 2015



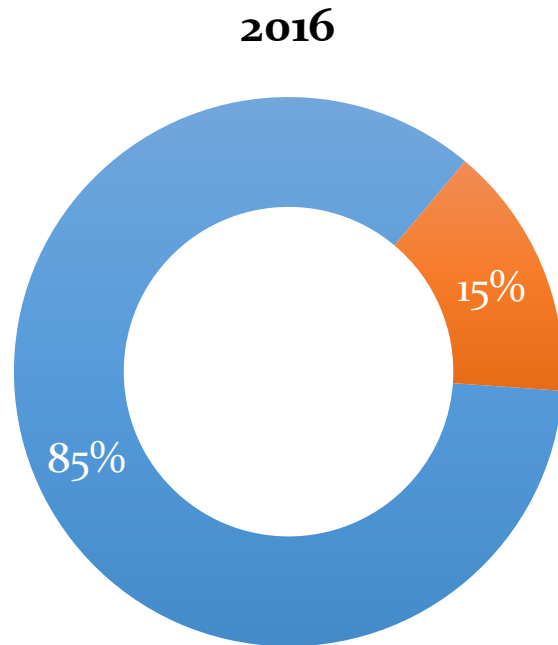
Q7. List, in order of importance, the languages for which your agency marketed courses in 2017.

Questions answered only by the  
**MANAGERS**

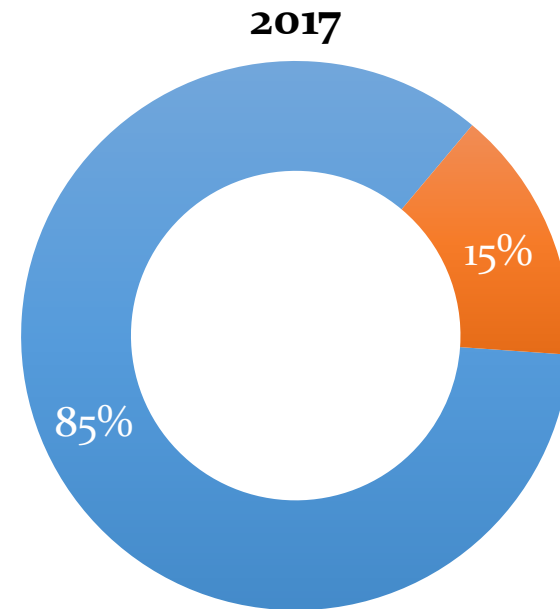
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# Agencies which offer online consultancy



■ Yes ■ No

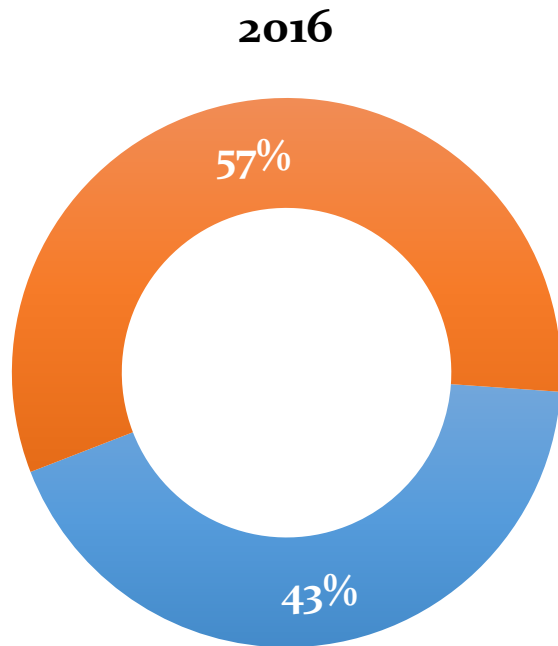


■ Yes ■ No

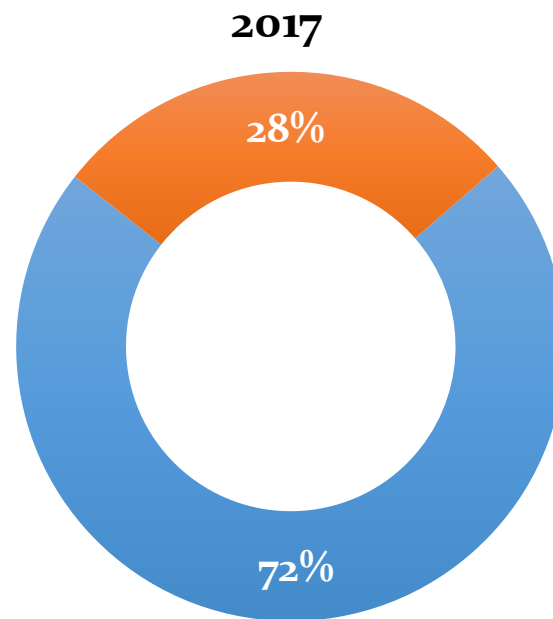
Q9. Does your agency offer online services?



# Agencies which offer online sales



■ Yes ■ No

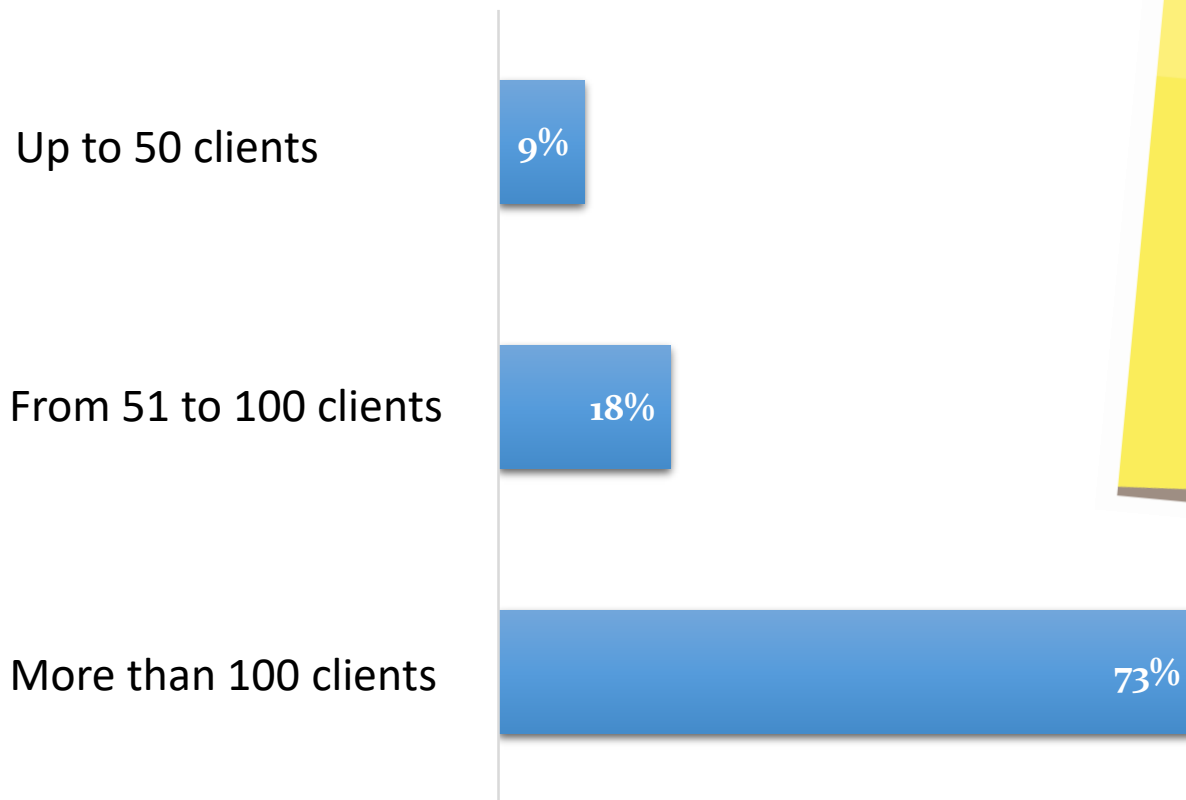


■ Yes ■ No

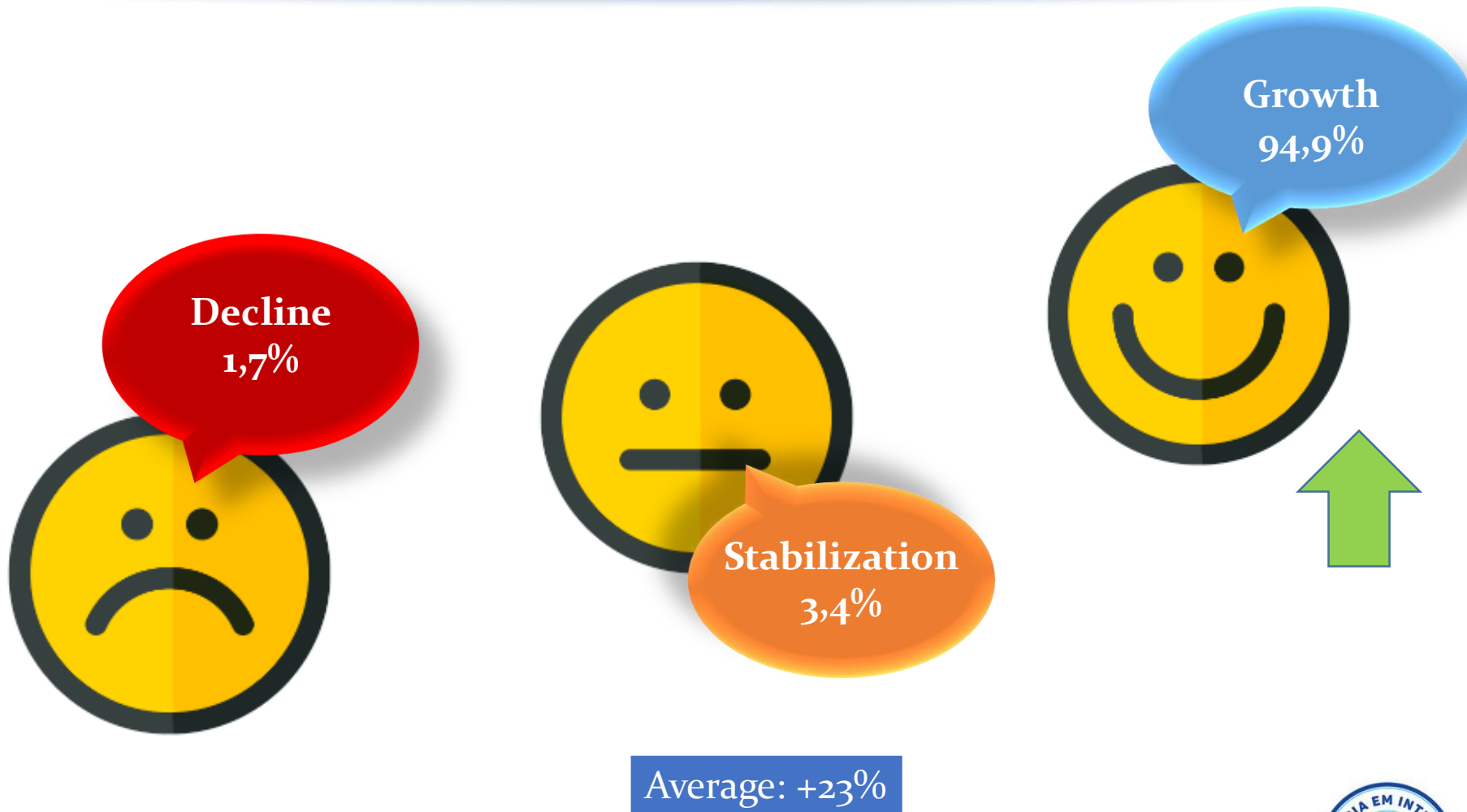
Q9. Does your agency sell on line?



# Average of clients per agency



# Total of products commercialized in 2017 (compared to 2016)



Q11. Compared to 2016, the total of products sold in 2017 represented:



# Main positive/ negative factors for the sales of products/ services

## Positive



- ✓ The client's need to stand out professionally
- ✓ Client's interest in investing in an international education
- ✓ Client's interest in having an international experience
- ✓ Possibility of paying the amounts involved in the exchange
- ✓ Permission to combine work and study activities

## Negative



- ✓ Valorisation of Dollar/ Euro in comparison with the local currency
- ✓ Decline of clients' purchasing power
- ✓ Economic/ Political crisis in Brazil and fear of decapitalization
- ✓ Client's unemployment
- ✓ Difficulty to obtain a visa

Q13. Point out, in order of importance, the FIVE main factors that favoured/ disfavoured the sale of products/ services in 2017.





# Main factors that favoured the sale of products/ service

Position 2017	Position 2016	Position 2015	Languages	Score (2017)
↑ 1st	5th	2nd	Client's need to stand out professionally	1118
2nd	3rd	4th	Client's interest in having an international education	1116
↑ 3rd	2nd	3rd	Client's interest in having an international experience	992
4th	9th	9th	Clients' ability to pay for the investment involved in studying abroad	657
5th	4th	5th	Permission to combine study and work activities	607
↑ 6th	11th	11th	Possibility to fund the course and air tickets	512
7th	1st	1st	Clients' need to invest in language learning	474
8th	7th	7th	Clients' interest in travelling and expanding cultural experience	204
9th	10th	10th	Easy to obtain visa	115
10th	6th	6th	Clients' wish to travel to new countries and get to know different cultures	101
11th	8th	8th	Clients need to attend the demands of employers in the industry	5

23<sup>0</sup>% mentioned in 1<sup>st</sup> or 2<sup>nd</sup> place, the client's need to stand out professionally

Q13. Point out, in order of importance, the FIVE main factors that favoured/ disfavoured the sale of products/ services in 2017.



# The main factors that are detrimental to the sale of products / services

Position 2016	Position 2016	Position 2015	Languages	Score (2017)
1st	1st	1st	Valorisation of Dollar/ Euro in comparison with the local currency	1750
2nd	2nd	2nd	Decline of clients' purchase power	1260
3rd	3rd	3rd	Economic/ Political crises in Brazil and the fear of decapitalizing at this time	1098
4th	4th	4th	Clients' unemployment	773
5th	5th	10th	Difficult to obtain visa	546
6th	8th	8th	Political and/ or economic instability in the country of destination	307
7th	7th	9th	Increase of airfare costs	306
8th	9th	6th	Difficulties to combine work and study activities in the country of destination	25
9th	6th	5th	Higher costs for studying abroad regardless of exchange rate	24
10th	10th	7th	Higher living costs in the country of destination	13
11th	11th	11th	Higher accommodation costs	5

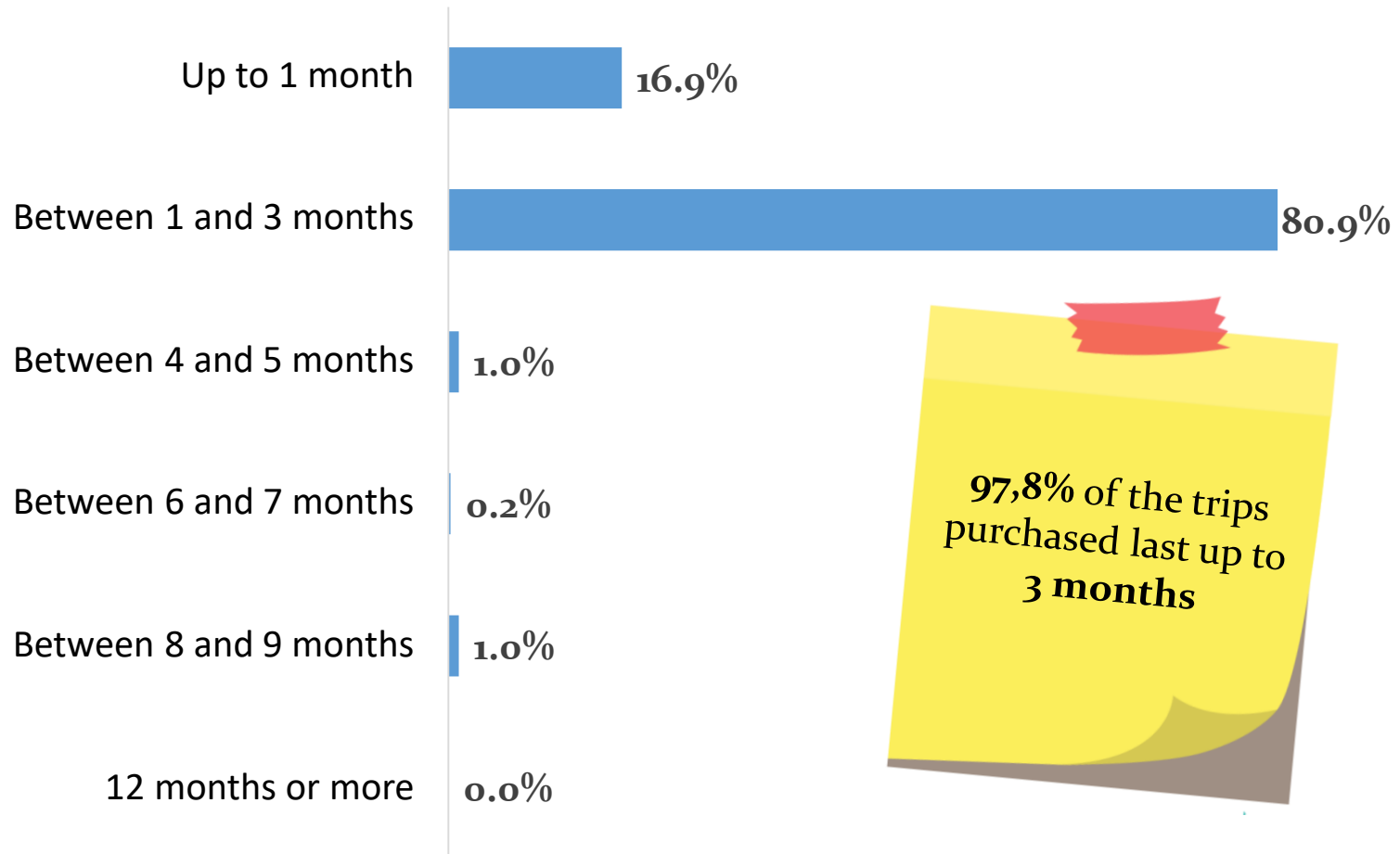
Obtaining a visa is still on of the main worrying factors appointed

The 4 first factors are still directly related to the political and economical crises.



Q13. Point out, in order of importance, the FIVE main factors that favoured/ disfavoured the sale of products/ services in 2017.

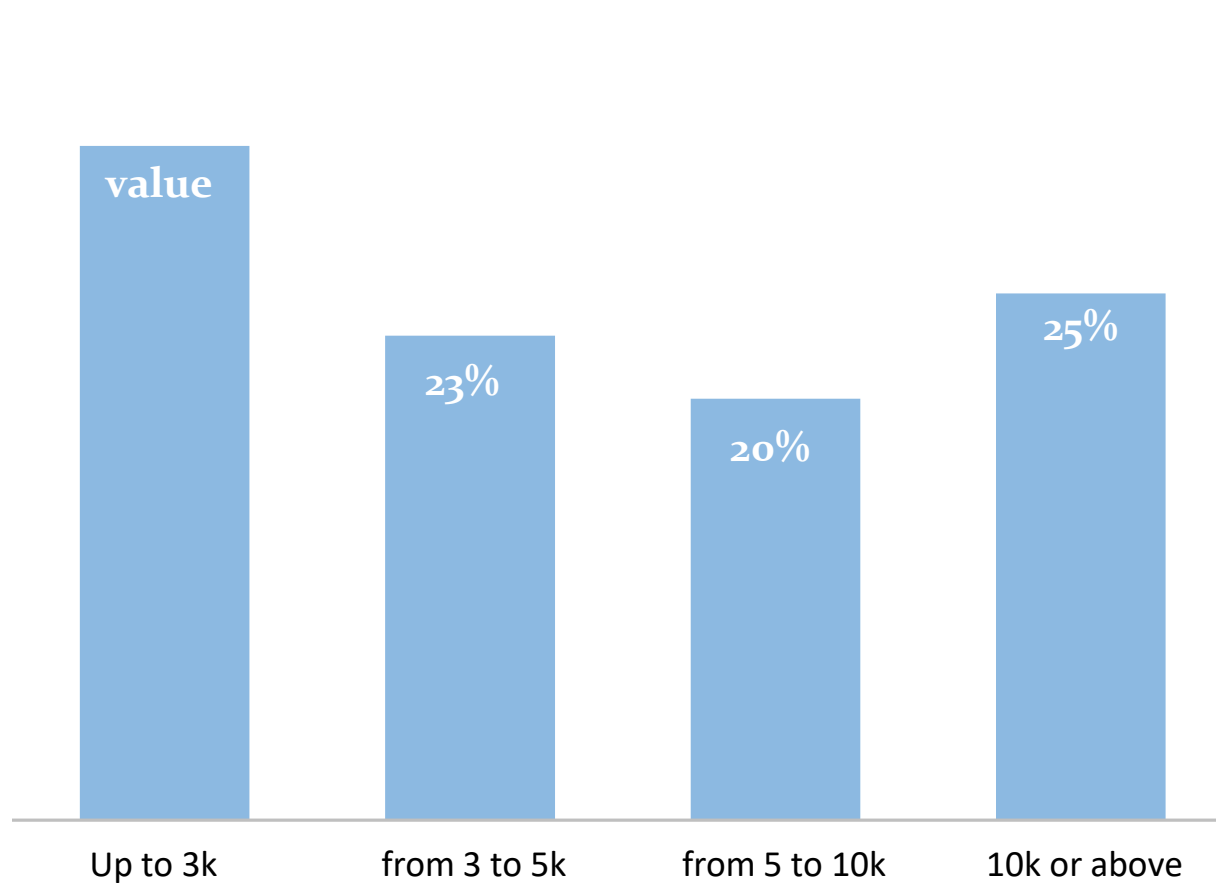
# Average time span of the programmes abroad



Q.15 Indicate the average duration of the programme contracted by your customers in 2017

# Average client investment (measured in dollars)

Average per client: \$ 9.989 (+12%)

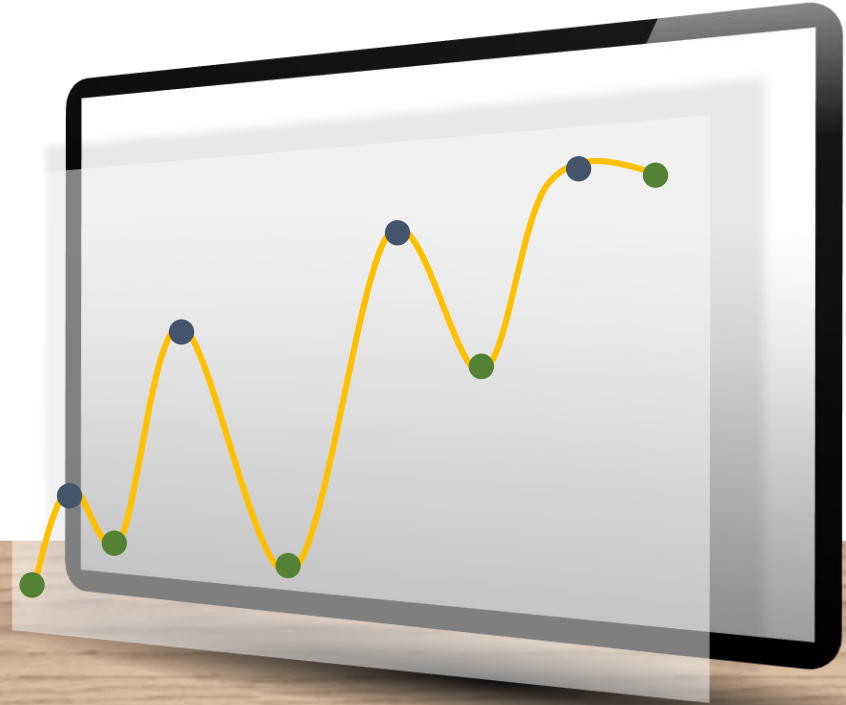


**Average revenue  
per agency:  
\$ 3.745.875**

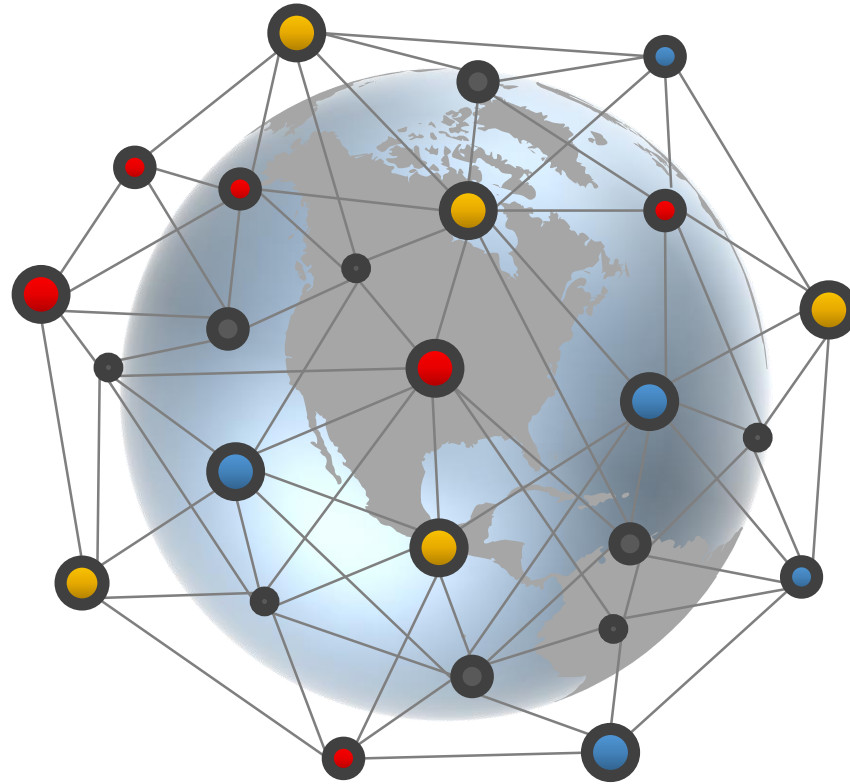


# Total turnover of the sector (projection)

Between \$ 2,7  
and  
\$3 billions



# Belta Seal Research– Students



**Development team**  
Manolita Correia Lima  
Danilo Torini  
Claudia Silva

# Methodology

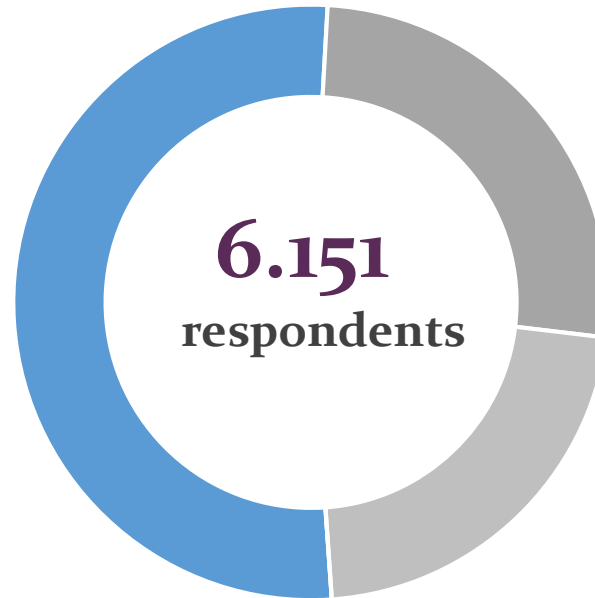
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- **Type of research:** quantitative;
- **Target-audience:** students who either studied abroad or are interested in studying abroad
- **Tool for data collection:** on-line questionnaire;
- **Strategy for data collection:** invitations sent via email;
- **Time span:** from December 2017 to march 2018;
- **Range:** national;
- **Listing:** supplied by Belta and Embassies/ Consulates/ international education institutions;



# Sample (students)

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21% have studied abroad 79% intend to study abroad



# Regional distribution



Q4a. In which state do you live in?

# State of residence

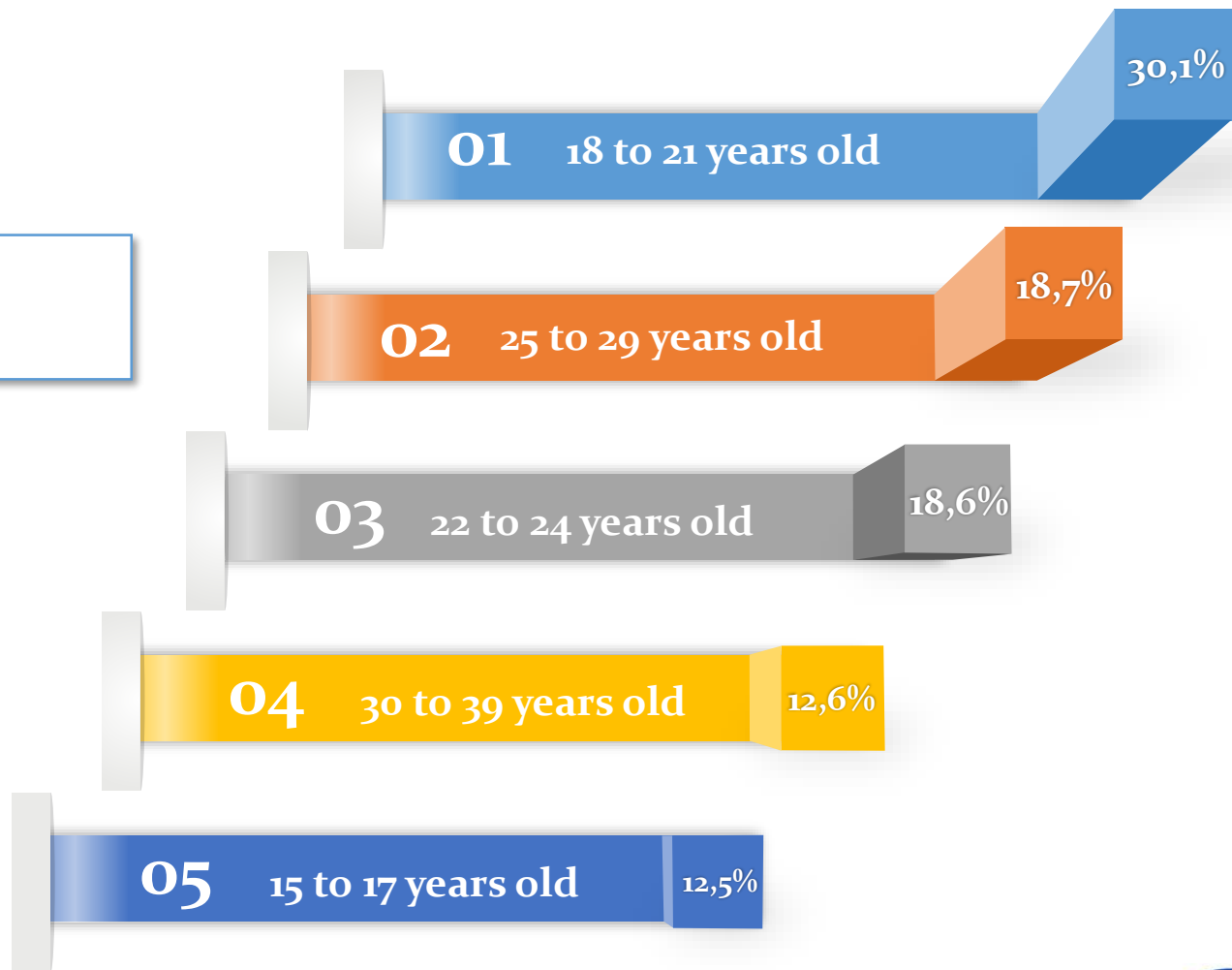
UF	%
São Paulo	33,0
Rio de Janeiro	13,4
Distrito Federal	11,6
Minas Gerais	9,9
Pernambuco	7,5
Rio Grande do Sul	6,5
Bahia	4,3
Paraná	4,0
Goiás	1,8
Ceará	1,7
Santa Catarina	1,5
Espírito Santo	0,7
Paraíba	0,6
Pará	0,5
Amazonas	0,5
Maranhão	0,5
Mato Grosso do Sul	0,4
Rio Grande do Norte	0,3
Mato Grosso	0,3
Sergipe	0,2
Piauí	0,2
Alagoas	0,2
Tocantins	0,1
Rondônia	0,1
Amapá	0,1

Q4a. In which state do you live in?



# Age group of respondents

Average age:  
24,6 years old



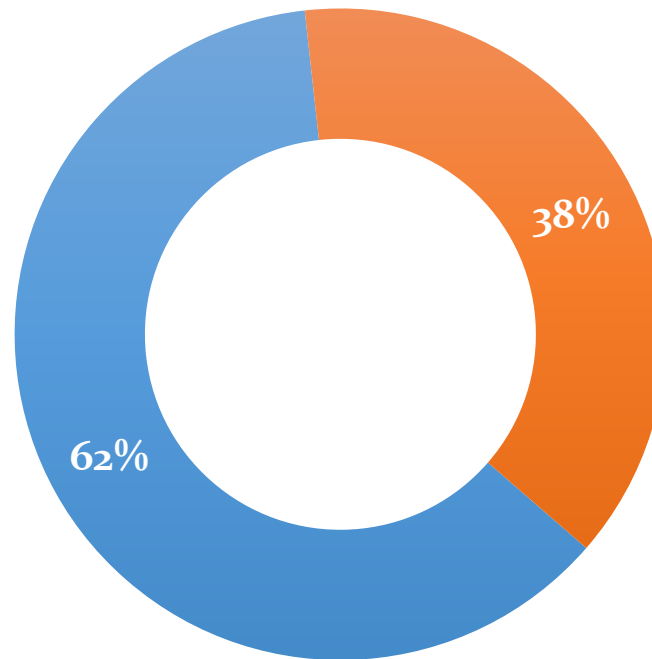
40 to 49 years old	3,9%
50 to 59 years old	2,1%
Under 15 years old	1,1%
60 years old or more	0,4%



# Sample (students)

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Gender



■ female ■ male



# Profile

Relationship status	%
Single	86,8
Married	7,7
Stable union	3,5
Divorced	1,5
Separated	0,4
Widow	0,1

Living with	%
Parents	68,3
Spouse	10,6
Alone	10,4
Other people	5,6
Grandparents	2,8
Friends	2,6

Professional status	%
Student only	33,8
Full time employee	27,7
Internship	10,4
Temporary work	7,4
Self employed	5,4
Employed in family business	2,9
Volunteer work	2,3
Retired	0,8
Others	9,3

2017



# Study abroad experience

\_\_\_\_\_

# Have studied abroad

Type	2015	2016	2017
Language course	43,2%	39,2%	46,4%
Undergraduate	19,0%	25,5%	12,1%
High School	4,6%	4,5%	9,3%
Language course with temporary work	5,2%	6,4%	6,3%
Teens' vacation courses (summer/ winter)	2,4%	2,7%	3,6%
Vacation work in the USA	3,0%	2,3%	3,1%
Volunteer work	2,4%	1,0%	3,1%
Professional course, certificate or diploma	4,5%	4,7%	3,1%
Cultural tourism	1,5%	1,8%	2,4%
Postgraduate academic courses (Master's or PhD)	2,2%	2,7%	1,8%
Internship/ work experience	2,1%	1,6%	1,8%
Graduate programme(MBA or Master)	2,6%	1,2%	1,8%
Academic events	1,1%	0,6%	0,5%
Corporate events	0,5%	0,8%	0,1%
Others*	4,5%	4,9%	4,7%

\*au pair; short courses etc



Q6. What kind of exchange programme did you do?

# Have studied abroad (by gender)

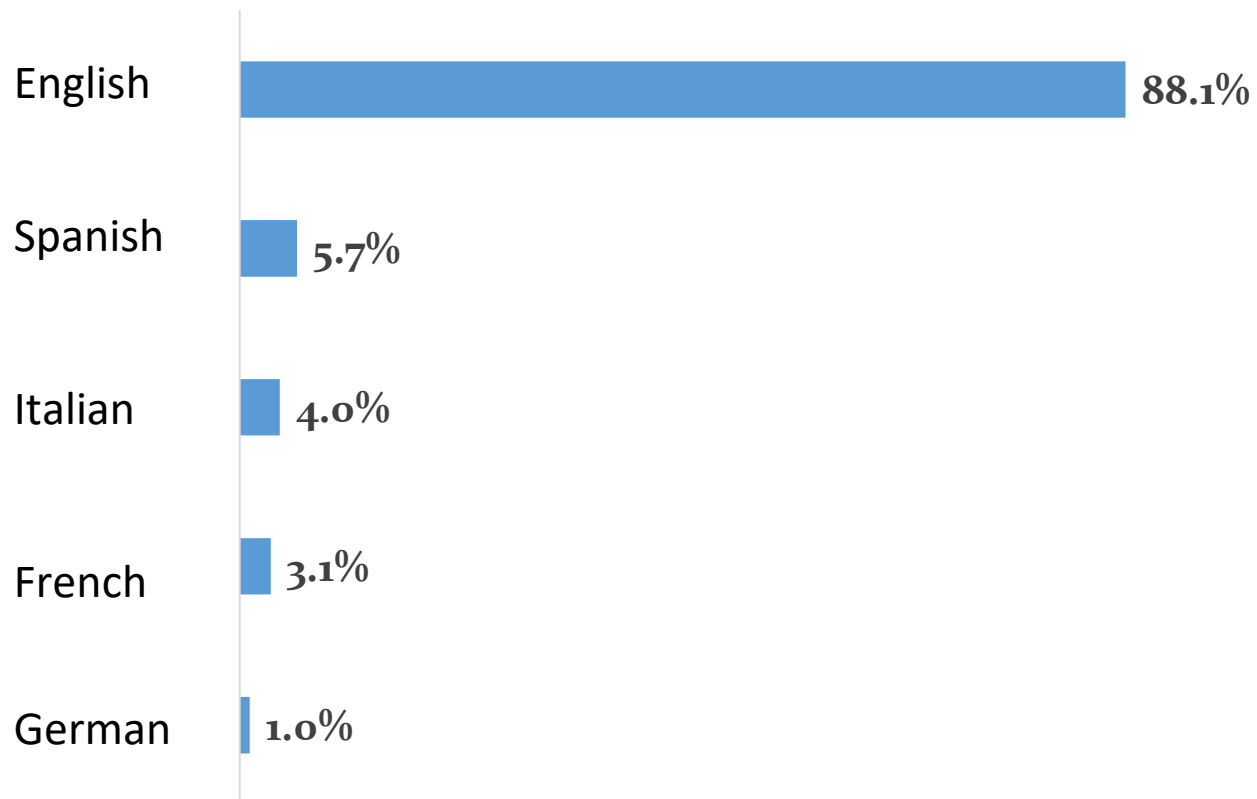
TYPE	Fem.	Male.
Language course	46,1%	46,7%
Undergraduate	12,4%	11,3%
High School	9,6%	8,7%
Language course with temporary work	6,0%	6,8%
Teen's vacation course (summer/ winter)	4,2%	2,3%
Vacation work in the USA	3,1%	3,5%
Professional course, certificate or diploma	3,2%	2,8%
Volunteer work	2,9%	3,3%
Cultural Tourism	2,6%	2,3%
Graduate programme(MBA or Master)	2,0%	1,4%
Postgraduate academic courses (Master's or PhD)	1,0%	3,3%
Internship / work experience	1,7%	2,1%
Academic events	0,3%	0,9%
Corporate events	0,0%	0,2%
Others*	4,9%	4,2%



Q6. What kind of exchange programme did you do?



# Language studied



Q7. Which language did you study?



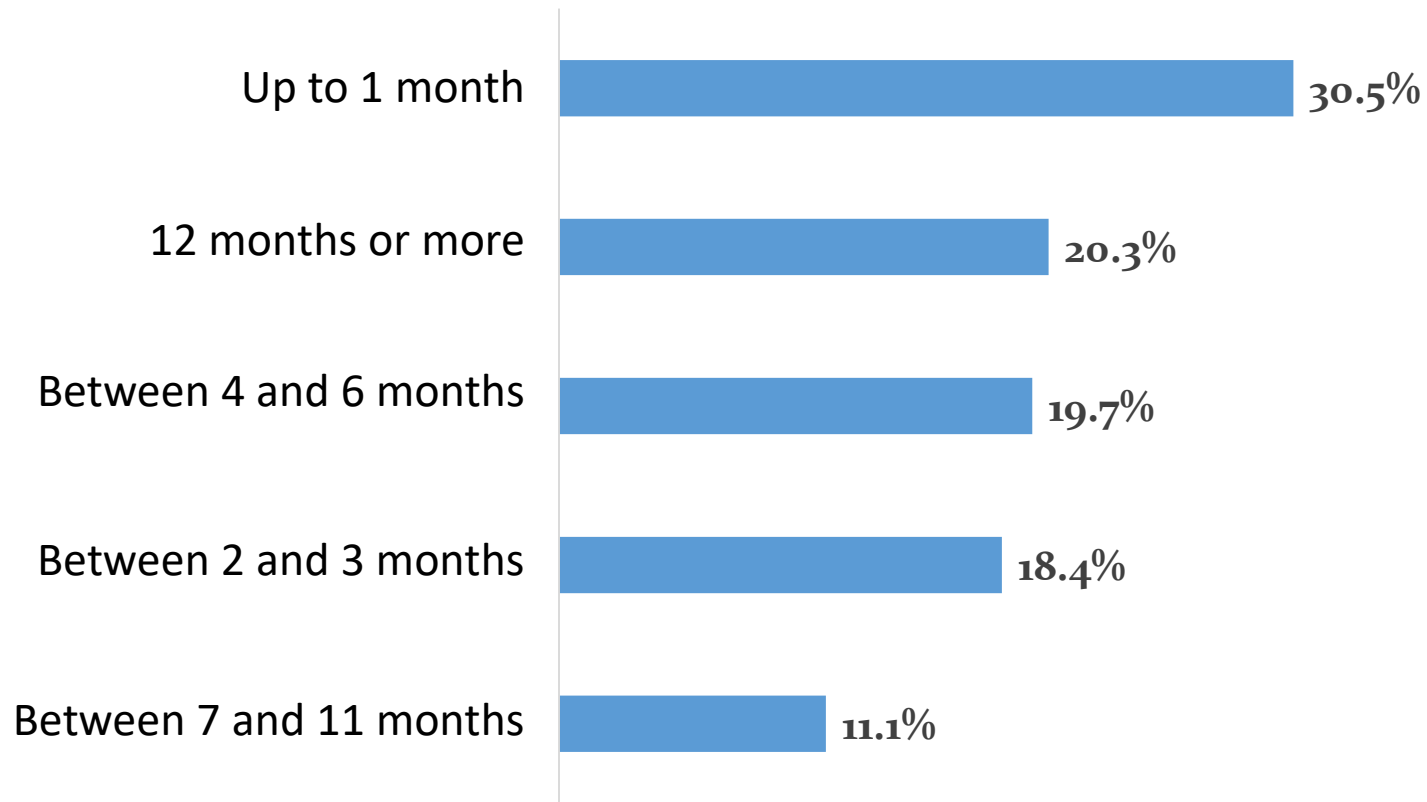
# Countries of destination

Countries	2015	2016	2017
Canada	18,8%	18,0%	23,0%
United States	22,3%	19,8%	21,6%
United Kingdom	14,4%	16,2%	10,2%
New Zealand	3,9%	5,4%	6,9%
Ireland	8,7%	10,8%	6,5%
Australia	4,4%	5,9%	3,6%
Portugal	3,1%	1,5%	3,2%
Spain	4,8%	4,4%	3,0%
France	2,6%	2,3%	2,5%
Argentina	1,7%	1,8%	2,4%
Malta	1,7%	0,8%	2,2%
Germany	4,8%	3,1%	2,1%
South Africa	2,2%	0,5%	1,3%
Italy	1,3%	1,5%	1,2%
Mexico	0,9%	0,8%	1,0%
China	0,4%	0,3%	0,7%
Chile	0,4%	0,5%	0,6%
Colombia	0,9%	0,3%	0,6%
Other countries	3,2%	6,1%	6,2%

Q8. Which country did you go to?



# Duration of the programme



Q9. How long was your exchange programme?



# How the programme was purchased

	2015	2016	2017
<b>In person, via international education agency</b>	<b>61%</b>	<b>68,1%</b>	<b>64,2%</b>
<b>Directly with school or organization abroad</b>	<b>31,5%</b>	<b>25,3%</b>	<b>25,1%</b>
<b>Online, via international education agency</b>	<b>7,7%</b>	<b>6,6%</b>	<b>10,7%</b>

# Investment amount

AMOUNT	2015	2016	2017
Between 5 and 10k (Reais)	27,7 <sup>0</sup> %	25,3 <sup>0</sup> %	26,3 <sup>0</sup> %
Between 11 and 15k (Reais)	14,2 <sup>0</sup> %	22,7 <sup>0</sup> %	21,2 <sup>0</sup> %
Up to 5K (Reais)	25,2 <sup>0</sup> %	18,7 <sup>0</sup> %	18,4 <sup>0</sup> %
Between 15 and 25k (Reais)	13,5 <sup>0</sup> %	17,3 <sup>0</sup> %	17,5 <sup>0</sup> %
Over 25k (Reais)	19,4 <sup>0</sup> %	16,0 <sup>0</sup> %	16,6 <sup>0</sup> %

Q11. What was the size of the required investment?



# Source of funds for studying abroad

Source of funds	2015	2016	2017
Own personal savings	49,4%	45,8%	43,2%
Family	40,6%	35,7%	42,9%
Scholarship from a National agency	16,1%	16,7%	7,7%
Scholarship from International agency	3,5%	4,0%	3,5%
Scholarship from home university	5,2%	4,8%	3,4%
Scholarship from the organization where I work	1,4%	2,0%	1,3%
Others*	1,2%	3,4%	5,5%

The total sum is above 100% because it was possible to choose more than one option

\*other scholarships, event organizers etc.

Q 12. Who sponsored your exchange programme? (you can choose more than one answer.)

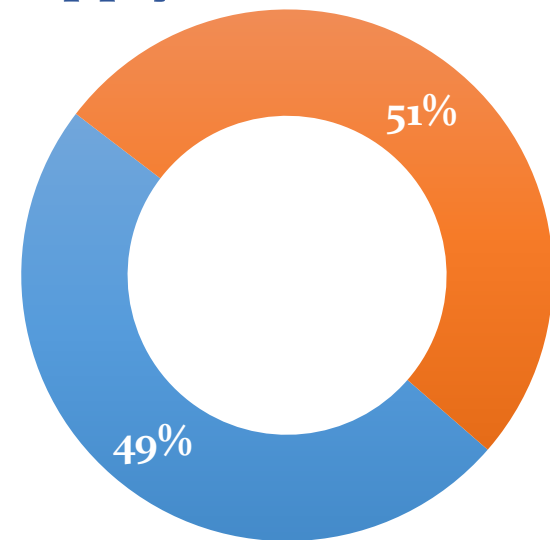


# Scholarship relation with agency

## Services acquired at the agency (scholarship)

Services	%
Travel health insurance	37%
Air ticket issuance	33%
Accommodation booking	20%
Assistance with visas	10%
Money exchange	3%

## Agency assistance to apply for scholarship



■ yes ■ no

Q12c. In addition to receiving the scholarship, have you acquired any other service (s) from an agency? If yes, which service(s)?

P12d. Have you used the service of an exchange agency to apply for this scholarship? Yes or no? If so, how did this happen?



# External influence for decision to study abroad

INFLUENCE	2015	2016	2017
Friends who have already studied abroad	31,3%	33,3%	28,5%
Information from websites specialized in study abroad	25,0%	25,3%	19,1%
My parents	20,2%	19,7%	17,3%
Information obtained in fairs and events about study, work and/or tourism abroad	22,5%	18,5%	17,2%
Professionals from the educations institution where I study	13,4%	14,7%	10,1%
Information from agencies that promote study abroad programmes	13,5%	13,5%	12,2%
Family members who have already studied abroad	9,1%	7,4%	7,2%
Professionals from the organization where I work	6,1%	7,2%	5,1%
Self-made decision/ No external influence	20,0%	17,6%	16,2%
Others*	4,0%	4,8%	4,3%

The total sum is above 100% because it was possible to choose more than one option

\*other relatives and digital influencers.



# Objectives for studying abroad

<b>1st OBJECTIVES ANSWERED</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>
<b>Accomplish the dream of getting to know different countries and cultures</b>	<b>22,4%</b>	<b>17,6%</b>	<b>19,2%</b>
<b>Interest in investing in an international education</b>	<b>24,2%</b>	<b>25,8%</b>	<b>17,2%</b>
<b>Interest in learning/ improving languages</b>	<b>16,3%</b>	<b>13,6%</b>	<b>13,9%</b>
<b>Live an international experience that combines work, study and tourism</b>	<b>11,5%</b>	<b>12,9%</b>	<b>7,2%</b>
<b>Interest in travelling and expanding horizons</b>	<b>7,5%</b>	<b>7,8%</b>	<b>5,8%</b>
<b>Important to make CV stand out</b>	<b>3,0%</b>	<b>3,6%</b>	<b>3,8%</b>
<b>Develop skills related to profession</b>	<b>7,5%</b>	<b>9,8%</b>	<b>3,5%</b>
<b>Interest in living abroad for a set period of time</b>	<b>2,9%</b>	<b>2,9%</b>	<b>2,9%</b>
<b>Have better conditions for an international career</b>	<b>1,9%</b>	<b>2,9%</b>	<b>1,8%</b>
<b>Gain more autonomy by temporarily living away from family</b>	<b>1,2%</b>	<b>1,1%</b>	<b>1,4%</b>
<b>Interest in making friends from different nationalities</b>	<b>0,4%</b>	<b>0,0%</b>	<b>0,4%</b>
<b>Employers' demand for international experience</b>	<b>0,4%</b>	<b>0,9%</b>	<b>0,3%</b>



Q14 List the three main OBJECTIVES of your exchange trip.

# Objectives for studying abroad

1st, 2nd and 3rd OBJECTIVES ANSWERED	2015	2016	2017
Accomplish the dream to get to know new countries and different cultures	38,2%	42,7%	46,50%
Interest in investing in international education	27,9%	28,7%	45,4%
Interest in travelling and expanding horizons	25,2%	27,5%	35,4%
Interest in learning/ improving languages	26,9%	33,8%	35,2%
Live an experience that combines work, study and tourism	22,7%	23,5%	32,7%
Importance to make my CV stand out	18,5%	20,4%	24,1%
Develop skills related to my profession	14,9%	12,0%	24,1%
Interest to live abroad for a set period of time	13,9%	17,4%	15,6%
Have better conditions for an international career	9,2%	8,1%	14,7%
Gain more autonomy by temporarily living away from family	6,9%	11,0%	10,0%
Interest to make friends from different nationalities	3,8%	5,8%	6,5%
Employers' demand for international experiences	1,1%	2,2%	5,3%
Other*	0,6%	2,3%	2,2%

\* Immigration related reasons, interest in moving abroad.



Q14 List the three main OBJECTIVES of your exchange trip.

# Reasons for country decision

1st REASONS ANSWERED	2015	2016	2017
Life quality in the country	5,3%*	13,90%	10,3%
Country's location	23,1%	12,6%	9,0%
Recommendation from friends and family	8,8%	7,1%	7,3%
Living costs better suited for financial conditions	6,8%	4,1%	6,6%
Being able to have a remarkable trip	11,7%	11,0%	5,4%
Natural beauty and cultural attractions	6,5%	6,6%	4,7%
Country's life style	-	-	4,7%
Public safety	6,7%	3,7%	4,5%
Favourable exchange rate	1,8%	1,4%	2,4%
Easy to obtain visa	3,9%	3,2%	2,1%
Permission to work in the country	2,8%	2,1%	2,1%
Information available in the media (newspaper, magazine, TV, websites, etc)	4,1%	2,7%	2,0%
The country offers more investment options for an academic pathway	6,3%	2,5%	1,3%
Possibility to fund course	3,6%	1,8%	1,3%
Destination approved by my parents	3,6%	1,6%	1,2%
Variety of curses format (short/ mid/ long term, summer/ winter, etc)	4,1%	3,4%	1,1%
Social valorisation of my diploma	4,2%	3,7%	1,0%
Country offers better investment options for an academic pathway	1,6%	2,1%	0,6%
Possibility to stay in the country and work after course	-	-	0,5%
Pathway options between English course and other study programmes	-	0,2%	0,4%
Possibility of financing the payment of the air tickets	0,6%	0,0%	0,3%
Other reason	18,8%	10,5%	6,6%

Q15. What were the three main factors that influenced your choice of destination country? (1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> places)

# Reasons for country decision

Reasons mentioned in 1st, 2nd and 3rd places	2015	2016	2017
Life quality in the country	17,6%	38,6%	31,1%
Country's location	18,9%	24,9%	20,3%
Country's life style	5,1%*	24,9%	19,4%
Natural beauty and cultural attractions	12,6%	20,5%	16,9%
Being able to have a remarkable trip	13,3%	22,3%	16,8%
Public safety	13,6%	16,3%	16,2%
Recommendations from friends and family	8,4%	11,8%	14,5%
Living costs better suited for financial conditions	6,8%	11,4%	14,1%
Easiness to obtain visa	5,8%	10,0%	9,8%
Favourable exchange rate	3,9%	4,4%	9,2%
Information available in the media (newspaper, magazine, TV, websites, etc)	5,5%	7,0%	5,8%
Social valorisation of my diploma	7,3%	8,4%	5,2%
Permission to work in the country	3,4%	5,2%	4,7%
The country offers more investment options for an academic pathway	5,6%	5,6%	4,1%
Possibility to stay and work after finishing studies		3,6%	3,8%
Possibility to finance the payment of the course	2,8%	2,8%	3,8%
The country offers more investment options for an international career	5,6%	7,8%	3,6%
Destination approved by my parents	3,6%	4,4%	3,6%
Variety of courses format (short/mid/long term, summer/ winter etc)	5,5%	6,6%	3,2%
Pathway options between English course and other study programmes		1,8%	2,1%
Possibility to finance air tickets	0,6%	1,2%	1,4%
Other reason*	11,1%	15,3%	10,3%

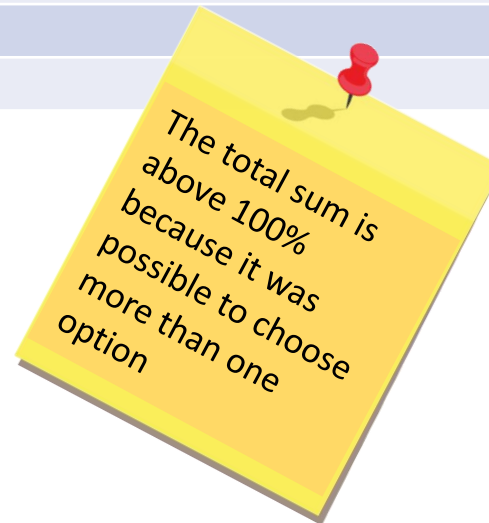
\*scholarship limitations, childhood dream, quality of institutions, etc

Q15. What were the three main factors that influenced your choice of destination country? (1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> places)



# Reasons for agency choice

REASONS	2015	2016	2017
Trust in the programme offered	45,7%	41,6%	36,3%
Easy to get in touch	32,8%	29,9%	31,0%
Custom-tailored services	31,2%	30,3%	28,8%
Payment methods compatible with my budget	25,3%	22,9%	24,8%
Final price for the programme	26,6%	22,5%	22,2%
Accessible location	16,0%	17,7%	18,6%
Appropriate structure	9,4%	10,8%	10,5%
Others*	6,8%	7,0%	13,0%



\* Agreements with school, company or funding agency.



Q16. What were the main reasons for choosing the agency or organization that took care of your exchange? (you can choose more than one option)

# Results of the study abroad experience

RESULTS	2015	2016	2017
Learn/ improve foreign languages	75,8%	74,1%	63,3%
Learn from an intercultural experience	74,0%	65,3%	60,9%
Better self-knowledge	51,9%	53,0%	47,9%
Mature emotionally	55,7%	49,4%	47,9%
Gain more personal autonomy	49,6%	50,8%	45,7%
Make my CV stand out	53,2%	54,8%	43,4%
Improve employability in Brazil	40,5%	37,1%	34,1%
Improve my social capital (make friends)	36,4%	32,7%	32,9%
Improve employability abroad	32,7%	32,1%	27,6%
Raise my self steam	29,4%	30,3%	26,5%
Develop skills related to my profession	28,9%	31,5%	17,9%
Study in a respected educational institution	24,0%	28,3%	17,0%
Specialize in my area of interest	17,8%	18,7%	9,6%
Obtain a diploma with social prestige	11,6%	10,8%	8,7%
Prospect scholarship opportunities	14,3%	12,2%	8,4%
Be part of international networks in my area of interest	12,9%	12,2%	7,3%
Acknowledgement in my area of interest	8,0%	9,0%	5,1%
Others*	1,4%	1,6%	1,1%

\* Learn how to deal with limitations, frustrations and acquire better conscience.

Q17 What were the main personal, academic and professional results of your exchange experience? (you can choose more than one option)

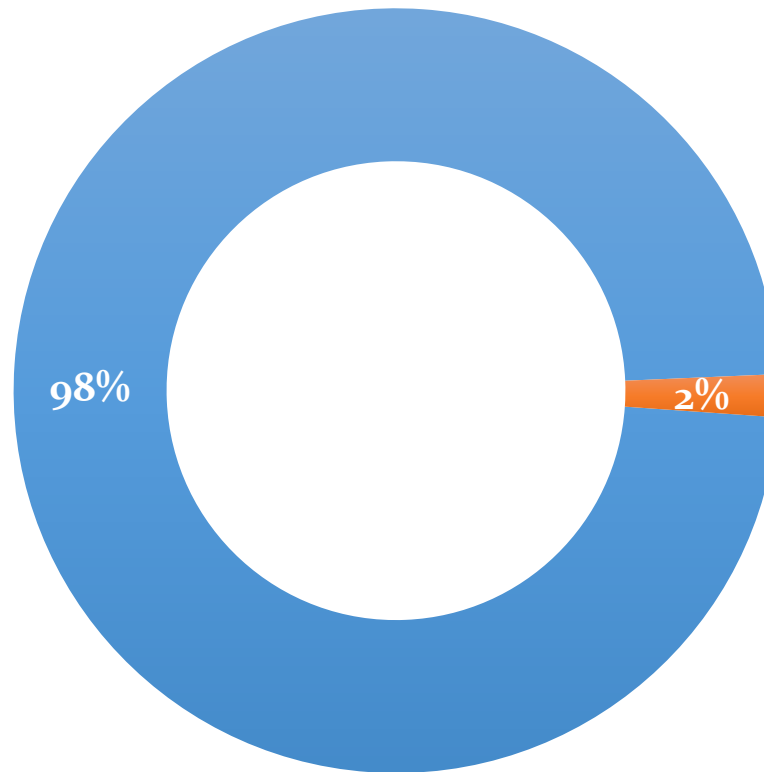






Interest in studying  
abroad

# Interest in studying abroad



■ yes ■ no ■

Are you interested in going in to na exchange programme soon?





# Possibility to study abroad in 2018

POSSIBILITY	%
1	30,2
2	8,1
3	9,1
4	7,2
5	16,8
6	6,3
7	6,4
8	6,4
9	2,7
10	6,9

	2018
From 1 to 4 (less likely)	54,5%
from 6 to 10 (more likely)	28,7%

9.19 Considering 1 (unlikely) and 10 (most likely), what is the possibility of you doing your exchange in 2017?



# Desired type of programme

TYPES	%
Language course with temporary work	38,0
Language course	17,6
Undergraduate	9,8
Professional course, certificate or diploma	6,0
Academic graduate course (masters or PhD)	4,8
Graduate courses (MBA or Master's)	4,1
Internship (work experience)	3,9
Teens' vacation courses (summer/ winter)	3,7
High School	2,8
Vacation work in the USA	2,5
Volunteer work	2,4
Cultural tourism	2,1
Academic events	0,9
Corporate events	0,1
Others	1,4

Q.20 What kind of exchange programme would you like to do?



# Objectives for studying abroad

1st OBJECTIVES ANSWERED	2016	2017	2018
Accomplishing the dream to get to know different countries and cultures	20,2%	17,5%	24,4%
Interest in investing in an international curriculum	30,5%	27,4%	21,9%
Interest in learning/ improving languages	11,5%	11,0%	17,7%
Live an international experience that combines study, work and tourism	11,9%	16,8%	9,1%
Interest in travelling and expanding my horizons	5,7%	3,2%	7,3%
Importance to make my CV stand out	3,8%	3,9%	4,8%
Develop skills to related to my professional activities	5,5%	8,9%	4,4%
Interest to live abroad for a set period of time	4,8%	5,6%	3,7%
Have better conditions for an international career	2,2%	3,8%	2,3%
Gain more autonomy by temporarily living away from family	1,0%	0,5%	1,8%
Interest of making friends from different nationalities	1,0%	0,2%	0,5%
Employer's demand for international experiences	1,2%	0,4%	0,4%
Others*	0,8%	0,9%	1,7%

\* immigration, "restart life in a better country"...

# Objectives for studying abroad

OBJECTIVES ANSWERED IN 1st, 2nd and 3rd PLACES	2016	2017	2018
Accomplishing the dream to get to know different countries and cultures	43,8%	46,2%	54,3%
Interest in learning/ improving languages	33,3%	34,2%	42,9%
Interest in investing in an international education	48,9%	46,2%	36,4%
Interest to travel and expand horizons	23,1%	29,1%	34,9%
Live an international experience that combines study, work and tourism	45,0%	41,4%	29,9%
Importance to make my CV stand out	20,1%	22,5%	25,9%
Interest to live abroad for a set period of time	21,9%	27,0%	22,1%
Develop skills related to my profession	27,9%	20,4%	15,2%
Gain more autonomy by temporarily living away from family	6,0%	6,0%	13,9%
Have better conditions for an international career	19,8%	14,1%	10,2%
Interest in making friends from different nationalities	4,2%	6,9%	7,3%
Employers' demand for international experiences	3,6%	3,3%	2,8%
Others*	2,4%	2,7%	2,9%

\* immigration, live abroad for a while and then decide about coming back, "restart my life in a better country"...



Q22. List the three main OBJECTIVES of your future exchange trip (1st, 2nd and 3rd places):

# Potential source of funds

SOURCES	2016	2017	2018
Own personal savings	60,9%	74,1%	48,3%
Help from family	34,5%	36,9%	35,9%
Scholarship from a international agency	38,5%	30,6%	30,0%
Scholarship from a national agency	32,5%	25,9%	27,9%
Scholarship from home university	18,3%	15,1%	13,8%
Other source*	-	6,7%	4,6%
Scholarship from the organization where I work	5,4%	4,1%	3,8%

The total sum is above 100% because it was possible to choose more than one option

\* Other types of scholarship and credit.



# Potential investment amount

AMOUNT	2016	2017	2018
Up to 5k (Reais)	30,1%	25,3%	40,7%
Between 5 and 10k (Reais)	36,6%	34,7%	32,7%
Between 11 and 15k (Reais)	17,0%	18,8%	13,1%
Between 15 and 25k (Reais)	9,0%	11,2%	6,5%
Over 25k (Reais)	7,3%	10,0%	5,5%

# New Zealand



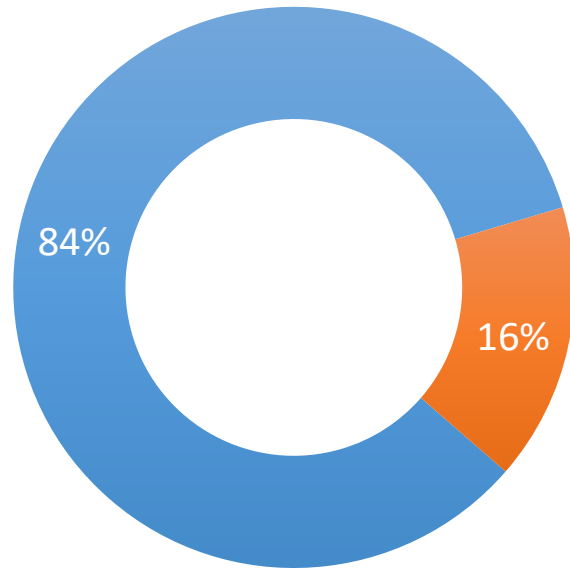
**NEW ZEALAND**  
EDUCATION

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**ThinkNew**<sup>TM</sup>

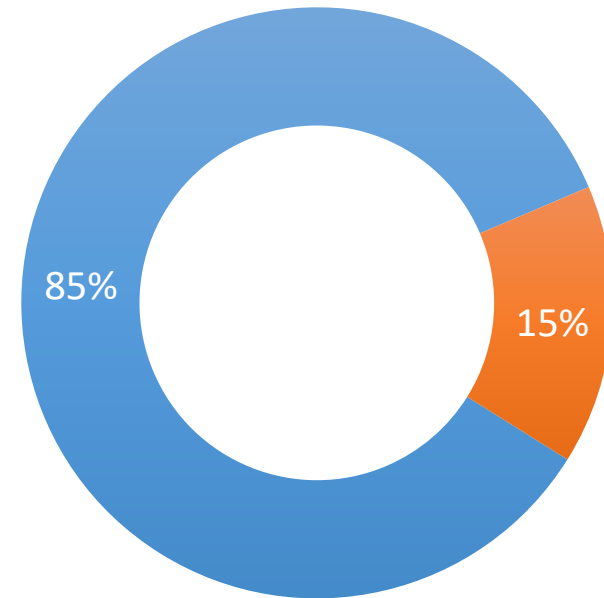
# Commercialization of New Zealand products

2016



■ yes ■ no

2017



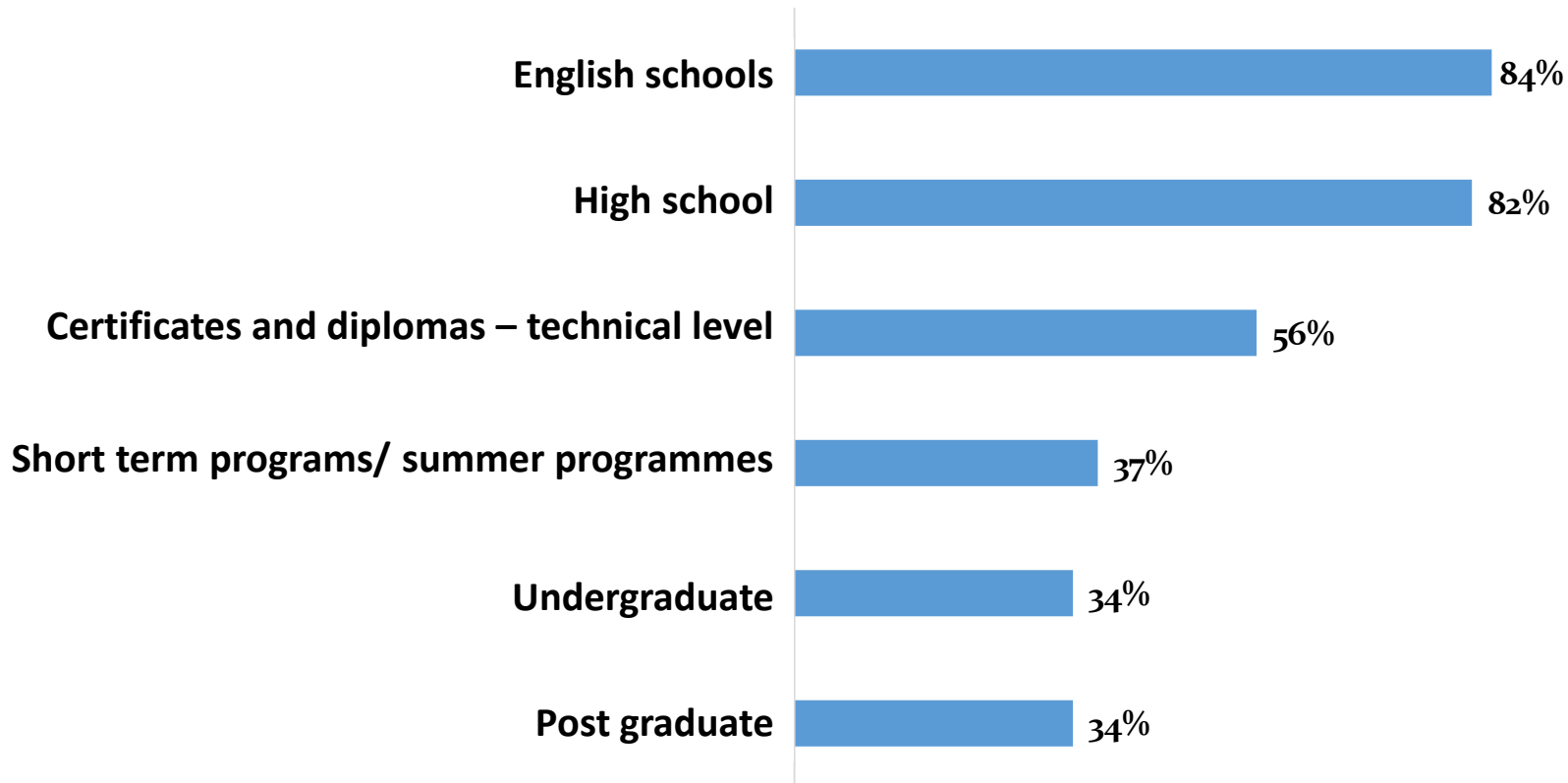
■ yes ■ no

Q17. In 2016, did you market one or more products to New Zealand?





# Education sectors represented

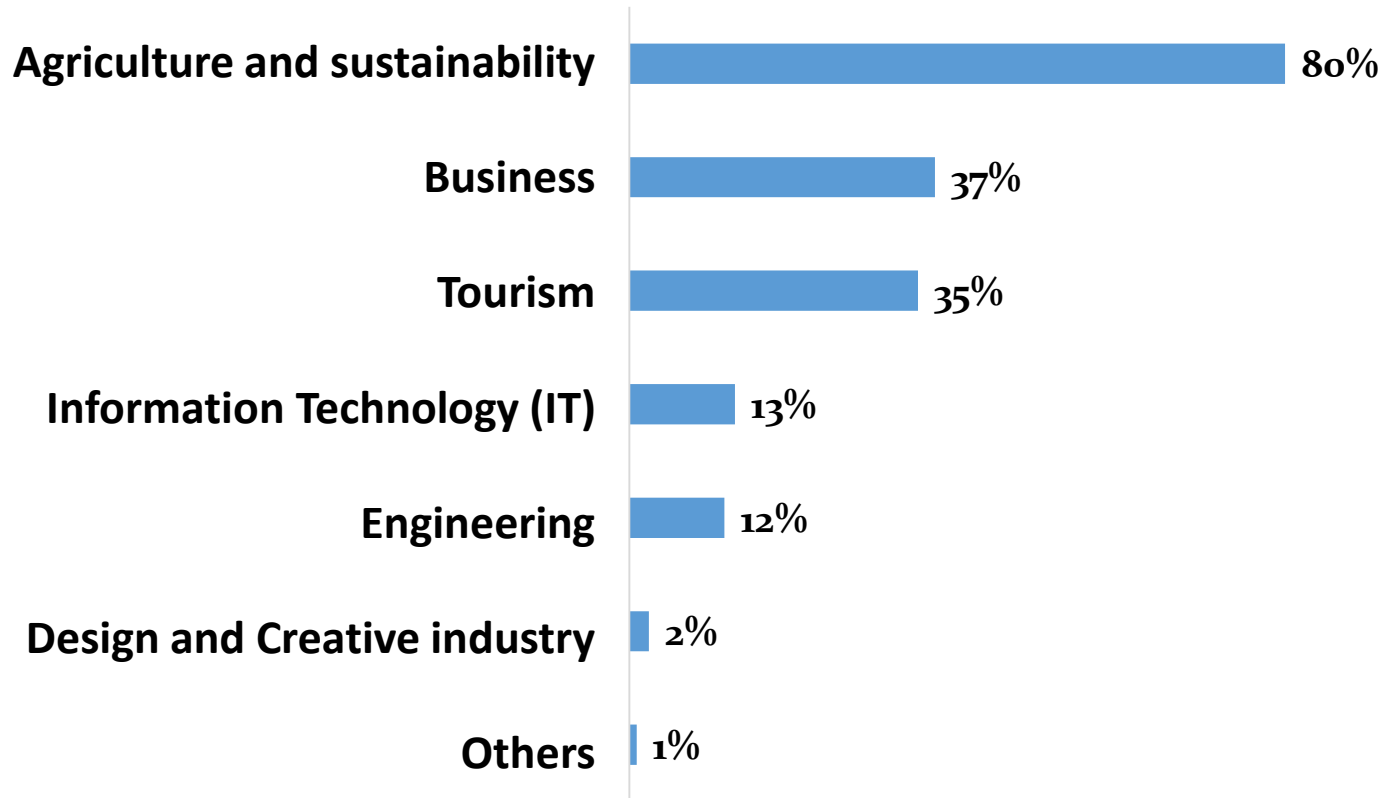


*Note: Multiple answer questions. This is the reason why the sum is more than 100%*

Q18. Which New Zealand education sectors do you represent?



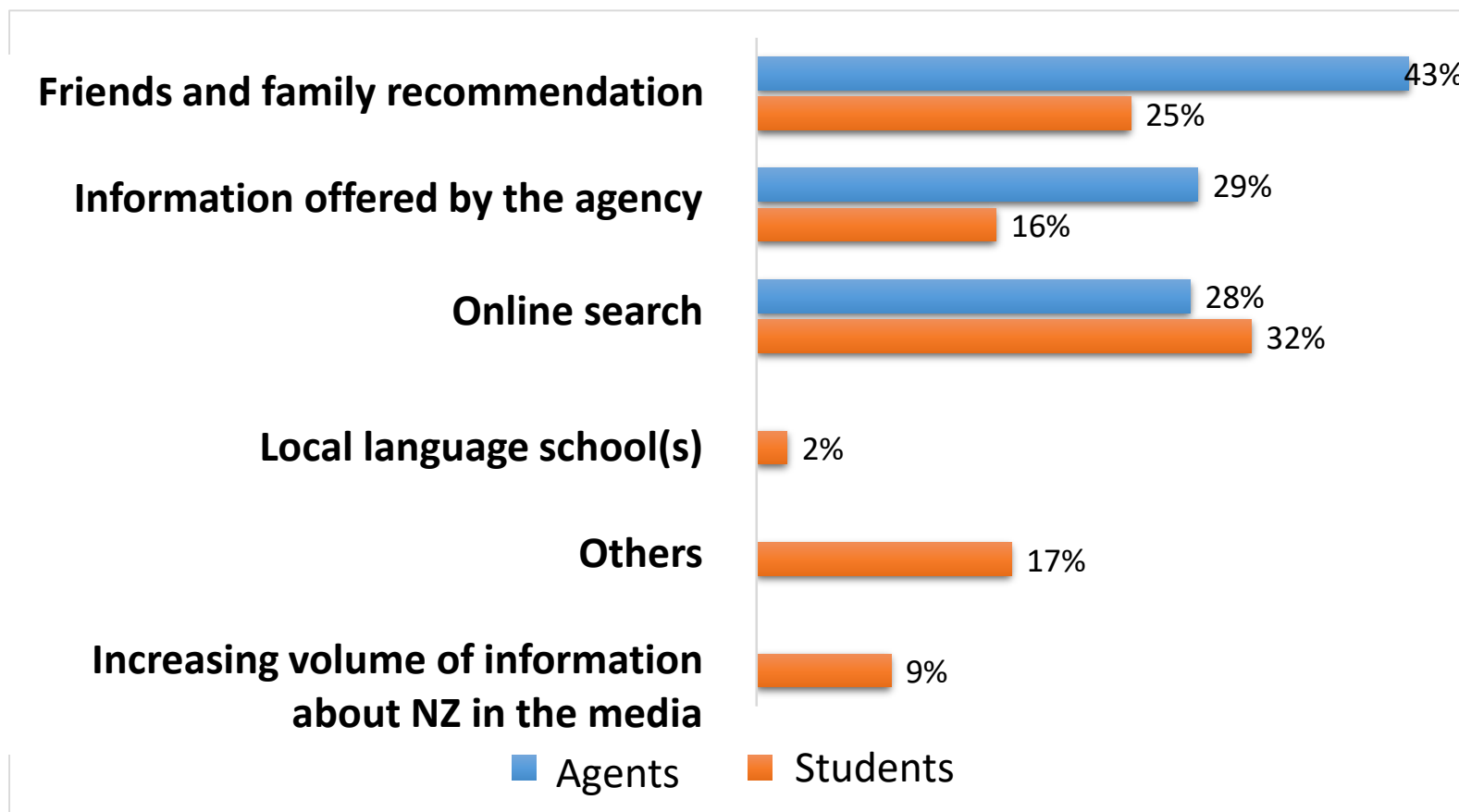
# Areas of knowledge seen as reference in the country



*Note: multiple choice question. Hence the sum is higher than 100%*



# Channels through which students got in touch with the country for the first time



\* others: digital influencers; social networks and digital media.

Q20. Among the students you sent to New Zealand in 2016, by which channel did the majority had the first contact with the country?



# Reason for the country choice

## (1st place answers- 2016)

	Agents	Students
Favourable exchange rate	42%	36%
English speaking country	13%	15%
Friends and family recommendation	10%	6%
Good structure to host international students	8%	12%
Possibility to stay and work in the country after finishing studies	8%	10%
Ease in the visa process	6%	8%
Country 's location	6%	4%
Policies that allow international students to combine study and work activities	2%	4%
Life quality	2%	4%
Public safety	2%	1%

# Reason for the country choice

## (First place answers- 2017)

	Agents	Students
Life quality	15%	11%
Natural beauty and cultural attractions	12%	16%
Friends and family recommendation	9%	7%
Information available in the media (newspaper, magazine, TV, websites, etc)	7%	5%
Country's location	6%	5%
Being able to have a remarkable trip	6%	7%
Public safety	4%	5%
Other reasons	4%	5%
Ease in the visa process	2%	2%
Country approved by parents	1%	1%
Permission to work	1%	1%
Cost of living compatible with my budget	1%	1%
Possibility to stay and work in the country after finishing studies	1%	1%

# Reason for the country choice

(Sum of 1st, 2nd and 3rd reasons answered - 2016)

	Agents	Students
Favourable exchange rate	69%	64%
Policies that allow international students to combine study and work activities	33%	45%
Ease in the visa process	33%	36%
Life quality	33%	43%
Good structure to host international students	29%	20%
English speaking country	25%	27%
Friends and family recommendation	21%	15%
Possibility to stay and work in the country after finishing studies	19%	24%
Country's location	17%	15%
Public safety	10%	16%
Easy pathways between English course and other types of study programmes	6%	4%
Presence of family or friends	2%	1%
Have a good climate for Brazilians	2%	1%



Q15. Outside education, what were the three main FACTORS that influenced the choice of destination country? (1st, 2nd and 3rd places)

# Reason for the country choice

(Sum of 1st, 2nd and 3rd reasons answered - 2017)

Quality of life	38%	35%
Natural beauty and cultural attractions	32%	33%
Being able to have a remarkable trip	26%	19%
Public safety	25%	20%
Country's location	14%	12%
Friends or family recommendation	10%	7%
Country's life style	10%	11%
Cost of living compatible with my budget	9%	7%
Information available in the media (newspaper, magazine, TV, websites, etc)	8%	7%
Ease in the visa process	7%	7%
Favourable exchange rate	7%	8%
Possibility to stay and work in the country after finishing studies	7%	8%
Permission to work	5%	5%
Other reasons	5%	6%
Possibility to finance the course payment	2%	4%
Destination approved by parents	2%	1%
Variety of courses format (short/mid/long term, summer/ winter etc)	1%	1%



Q15. Outside education, what were the three main FACTORS that influenced the choice of destination country? (1st, 2nd and 3rd places)

# Evaluation



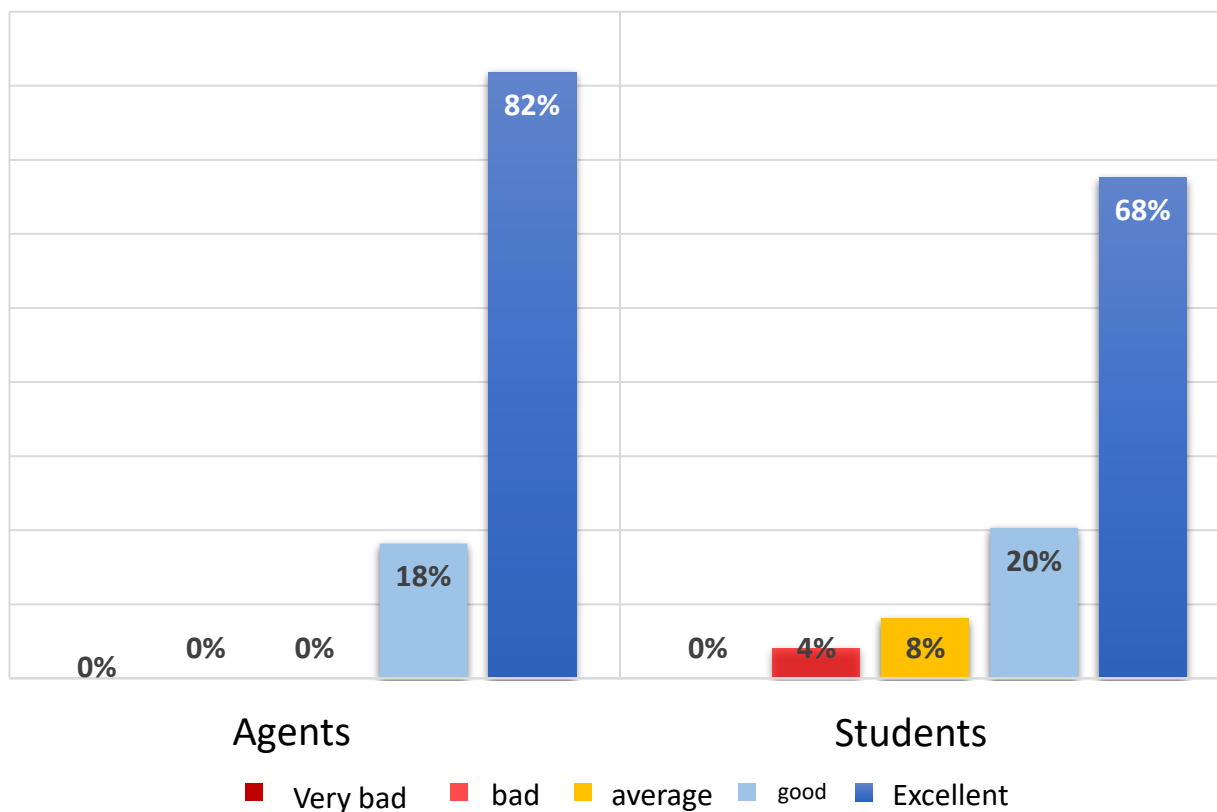
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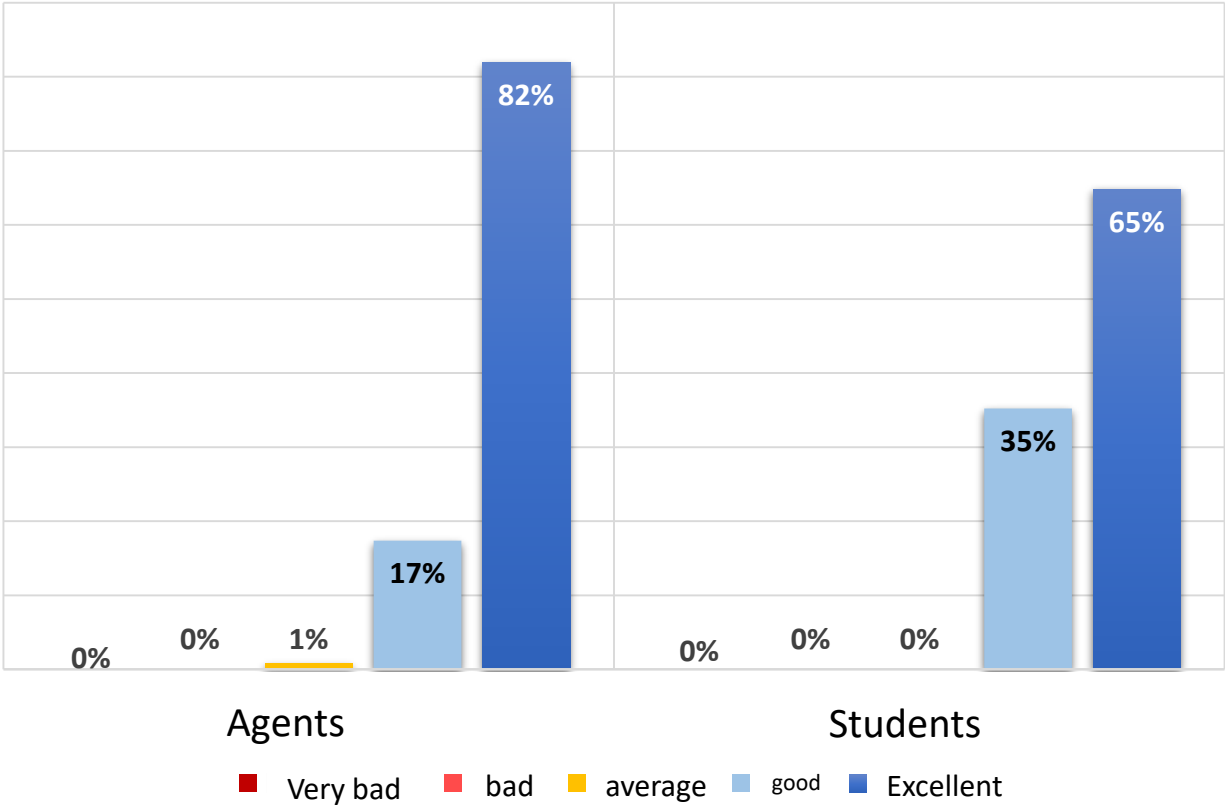
# Quality of English schools and language programmes



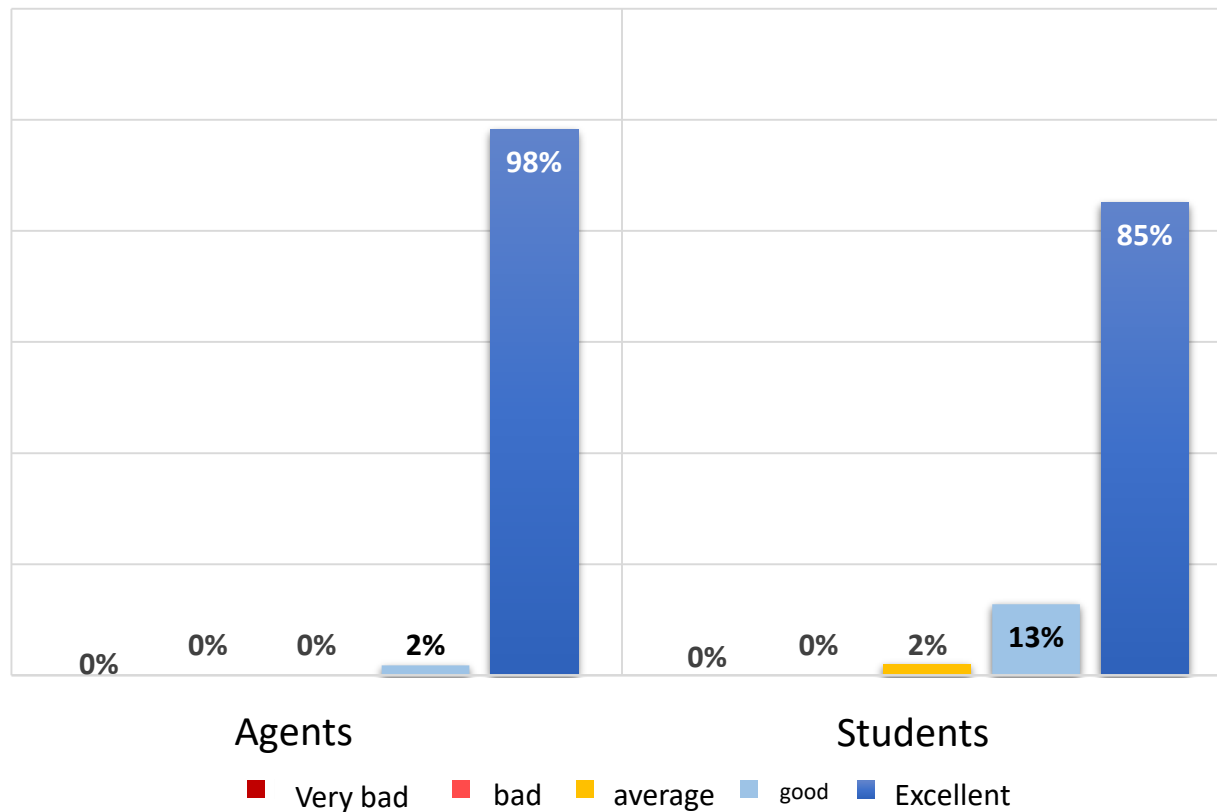
Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



# Quality of higher education programmes and institutions



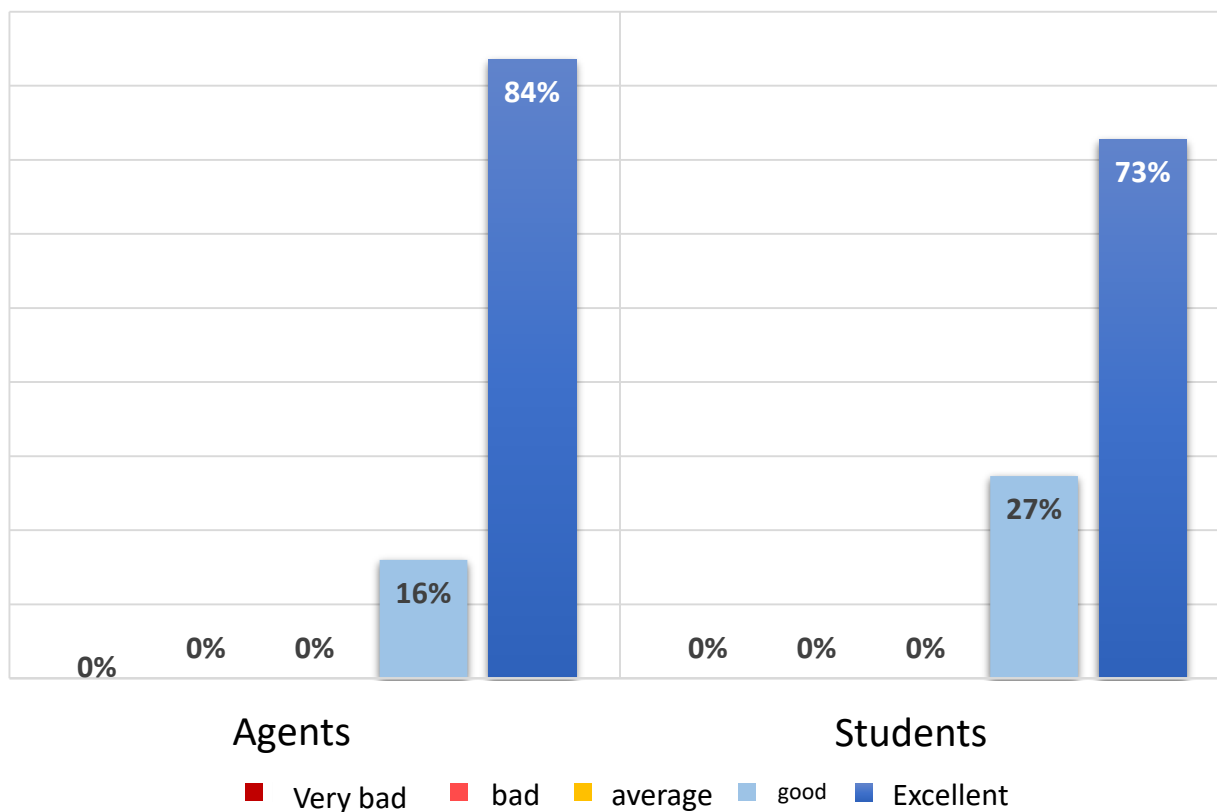
# Safe country and welcoming people



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



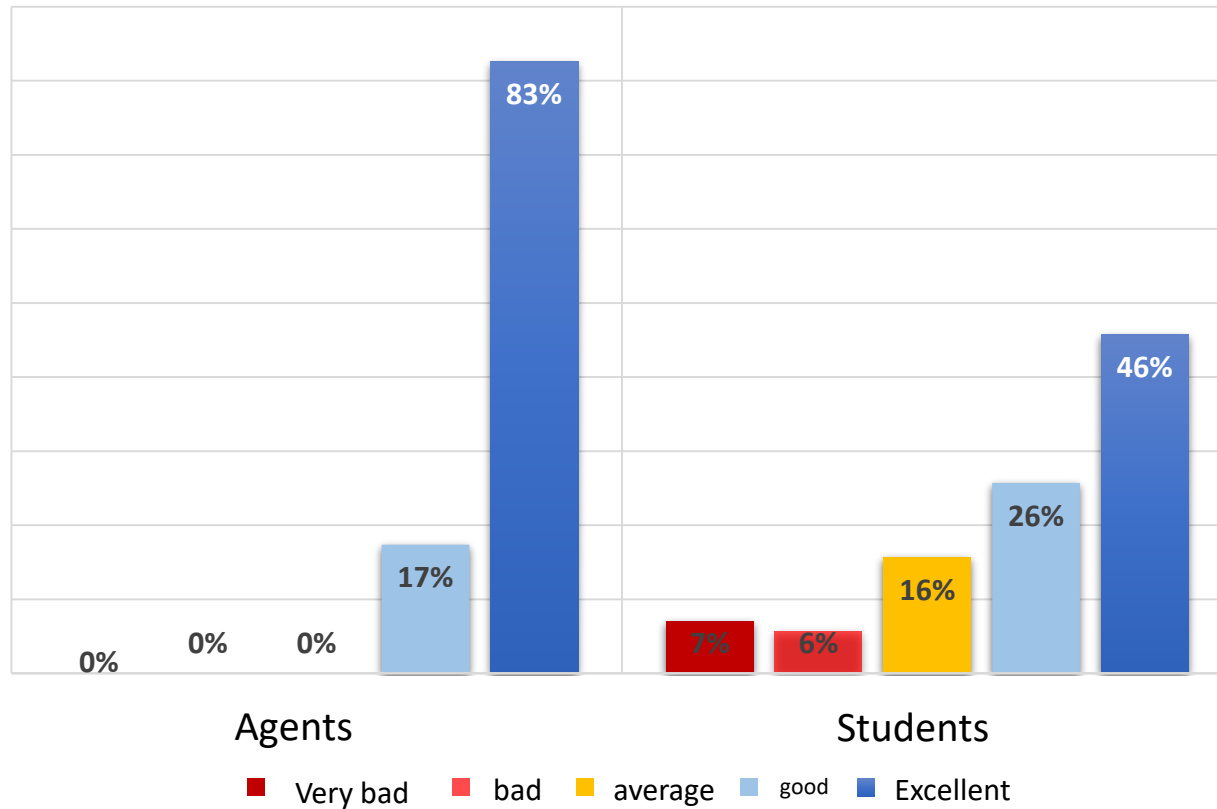
# Quality of experience in High School programmes



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



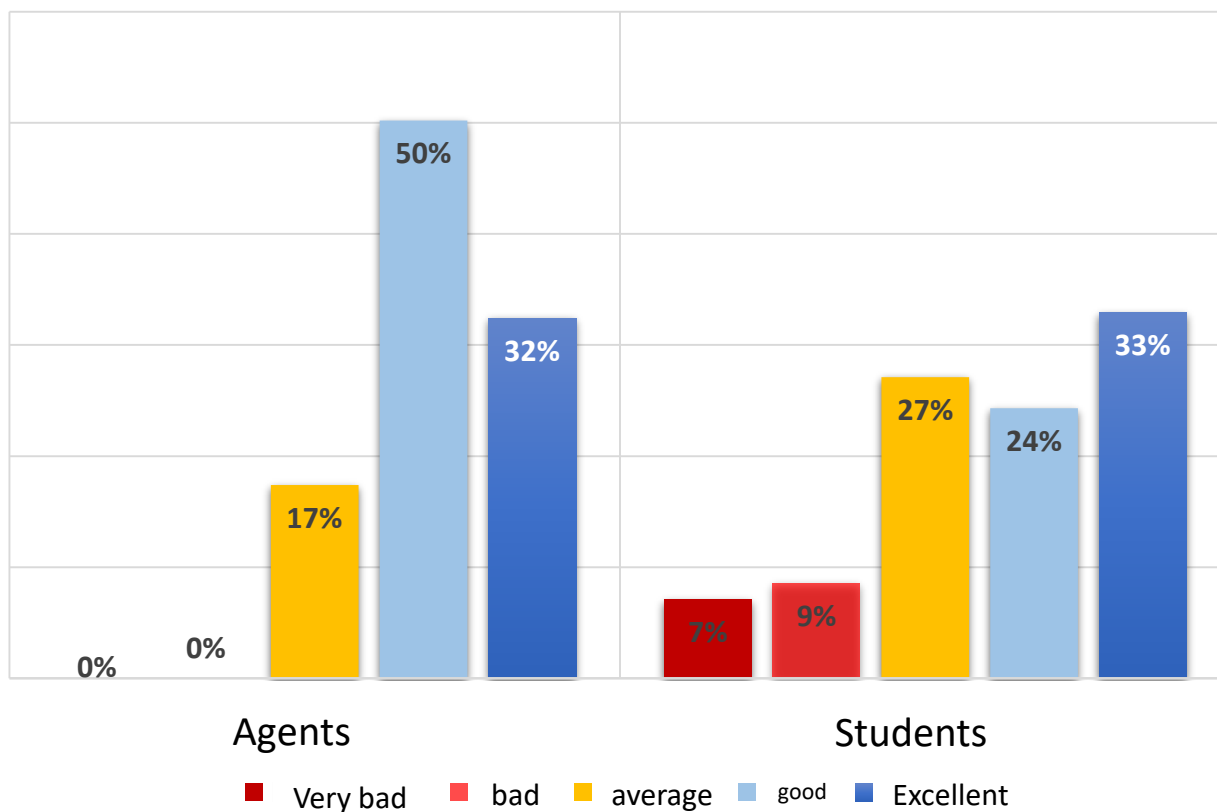
# Possibility to work in the country while studying



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



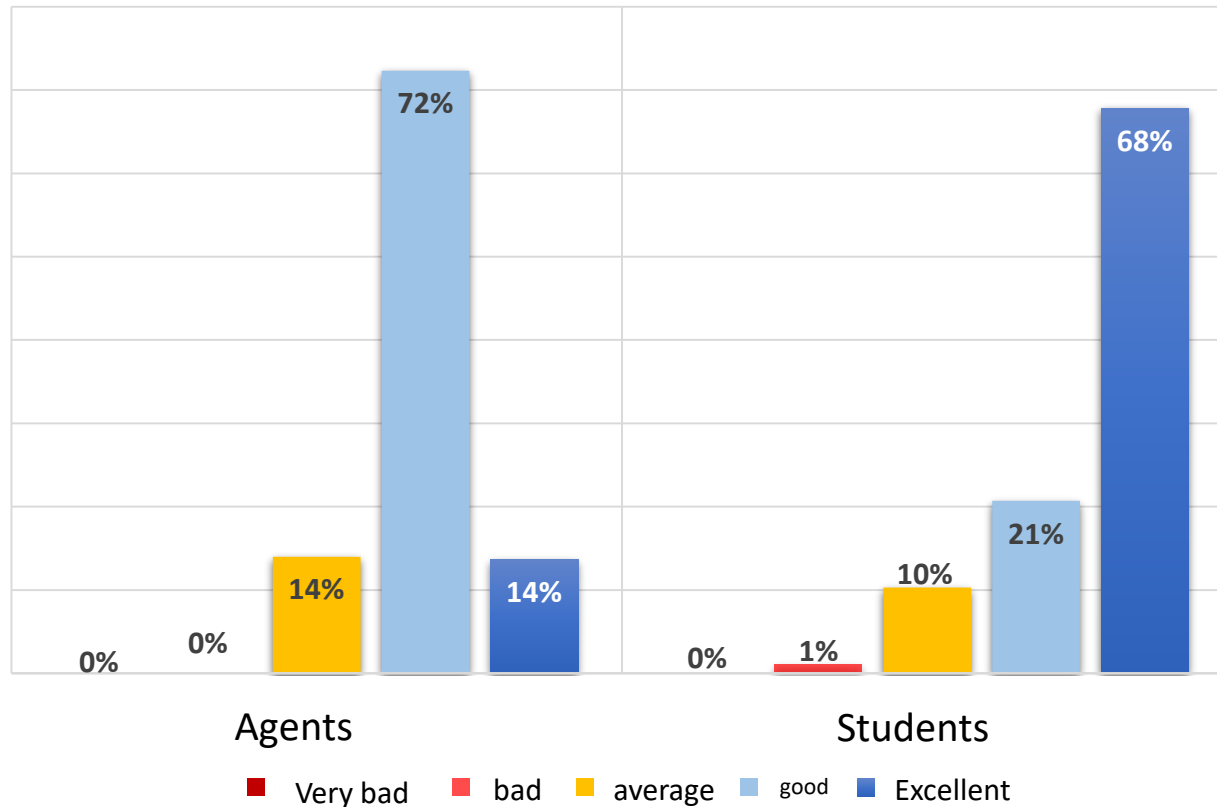
# Real chances of staying and working in the country after finishing studies



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



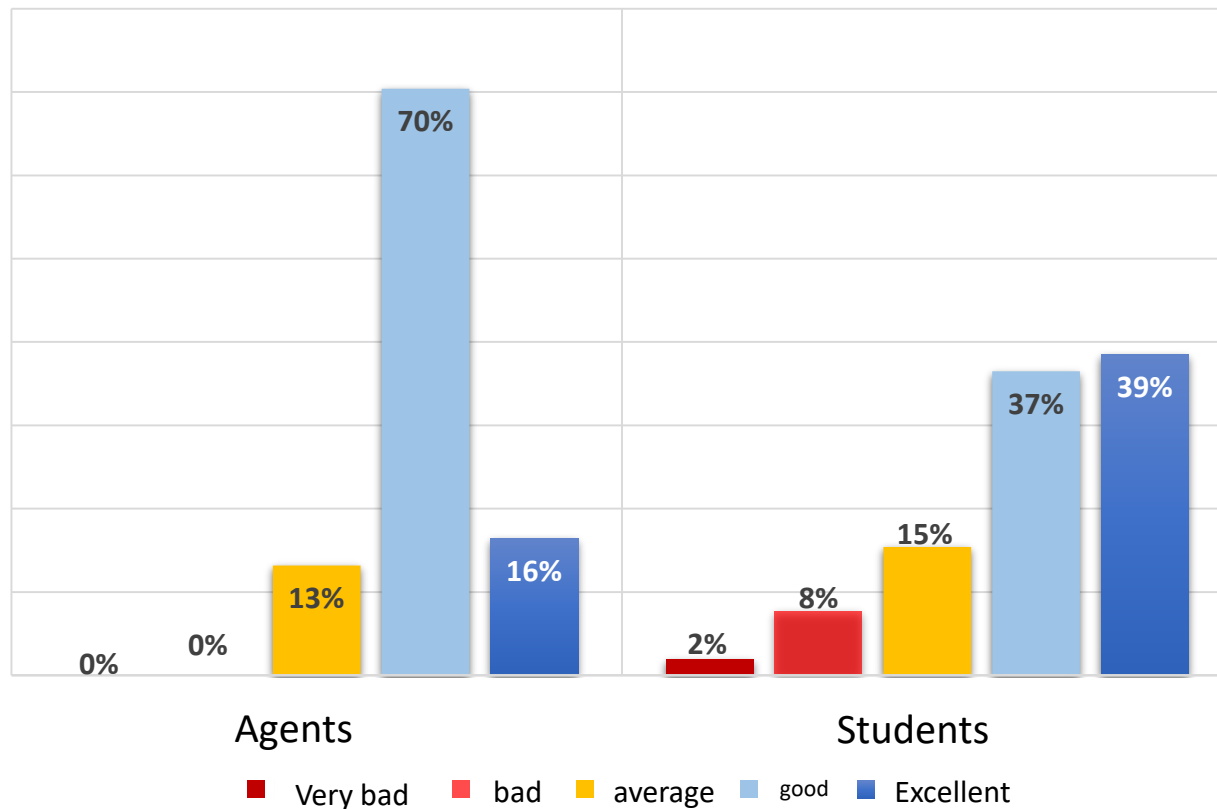
# Country's qualifications will have a positive impact on the student's career



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



# Ease to move from English programmes to Higher Education programmes



Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?





# Comparison (2016)

(Sum of excellent and very good percentages)

	Agents	Students
Safe country and welcoming people	96%	97%
Quality of English schools and language programmes	94%	88%
Quality of experience in high school programmes	89%	100%
Quality of higher education programmes and institutions	86%	92%
Possibility to work in the country while studying	80%	77%
Country's qualifications will have a positive impact on the students career	78%	91%
Ease to move from English programmes to higher education courses	78%	100%
Real chances of staying and working in the country after finishing studies	77%	67%

Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



# Comparison (2017)

## (Sum of excellent and very good percentages)

	Agents	Students
<b>Safe country and welcoming people</b>	<b>100%</b>	<b>98%</b>
<b>Quality of English schools and language programmes</b>	<b>100%</b>	<b>88%</b>
<b>Quality of experience in High School programmes</b>	<b>100%</b>	<b>100%</b>
<b>Possibility to work in the country while studying</b>	<b>100%</b>	<b>72%</b>
<b>Quality of higher education programmes and institutions</b>	<b>99%</b>	<b>100%</b>
<b>Country's qualifications will have a positive impact on the student's career</b>	<b>86%</b>	<b>89%</b>
<b>Ease to move from English programmes to higher education programmes</b>	<b>86%</b>	<b>76%</b>
<b>Real chances of staying and working in the country after finishing studies</b>	<b>82%</b>	<b>57%</b>

Q21. Considering a scale from 1 to 5 (where 1 = very poor and 5 = excellent), what grade do you assign to the following items related to New Zealand?



# Main barriers (2016)

	<b>Agents</b>	<b>Students</b>
Distance	45%	51%
Cost of air ticket	19%	24%
Difficulties with visa	11%	13%
Cost of programmes (mainly high school)	11%	12%
Lack of information/ knowledge about the destination	9%	7%
Bureaucracies linked to the possibility of working	6%	13%

Q25. In your opinion, what is the main barrier to promoting New Zealand as a student destination?



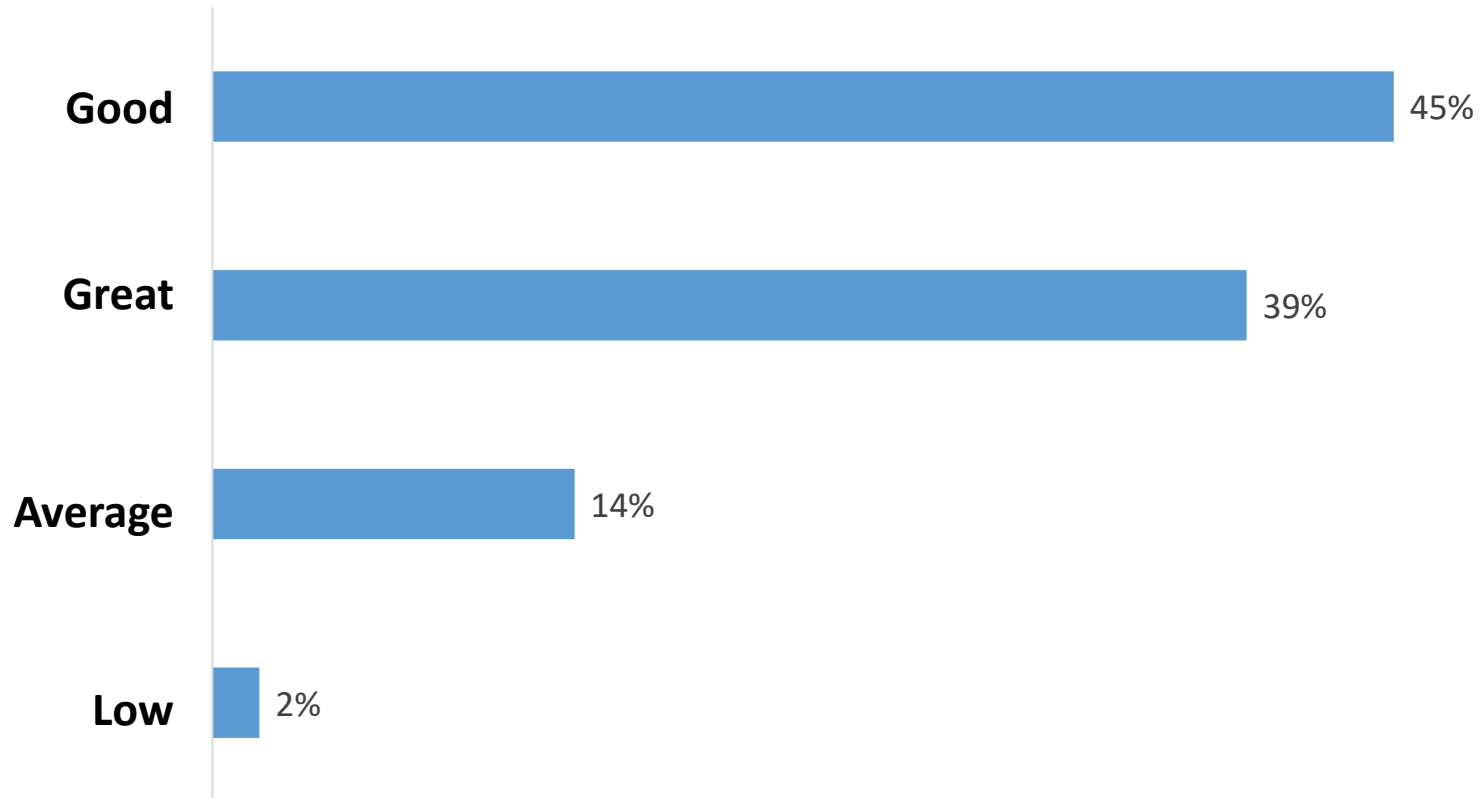
# Main barriers (2017)

	Agents	Students
Lack of information/ knowledge about the destination	30%	18%
<b>Cost of life*</b>	17%	21%
Difficulties with visa	16%	14%
Distance	14%	25%
Cost of air ticket	12%	17%
Cost of programmes	9%	10%
Bureaucracies linked to the possibility of working	4%	8%

Q25. In your opinion, what is the main barrier to promoting New Zealand as a student destination?



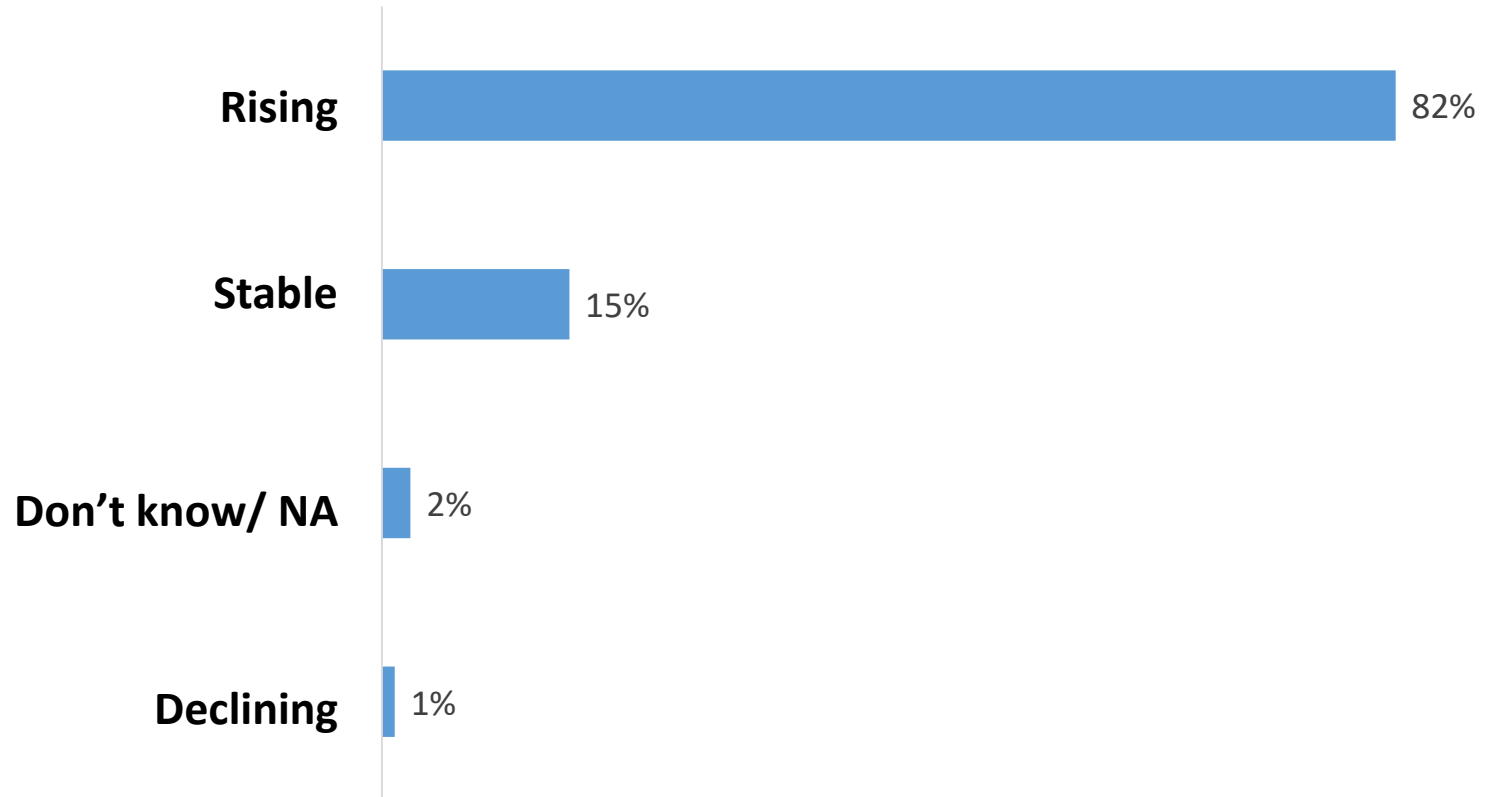
# Agency knowledge about New Zealand(Agents)



Q22. How would you rate your agency's knowledge of New Zealand?



# Demand of students for New Zealand (Agents)



Q23. In general, you would say that students' demand for New Zealand has:



# Suggestions and comments(agents)

Destination is recommended to students who enjoy nature and outdoor activities. We need to work more on the career opportunities and universities of the country.

There is a lack of transparency on the visa policy. The new changes brought disorders.

Still lacks some promotions and the identification is still low. The distance is not an issue.

There isn't deep knowledge of the country and its rules. And not having visited the country.

The lack of knowledge from students. A campaign with more promotion of the destination would help

Cost of air ticket

Costs are not very attractive

New Zealand is not often mentioned by the media and the students visa is very bureaucratic.

People think New Zealand is too far away and the cost of air tickets

Lack of knowledge and distance of the country

Distance of the country and lack of plenty of information like other countries.

Distance and lack of knowledge from students

Lack of knowledge

Air ticket costs and distance for short term courses

Q24. What activities or initiatives for other English-speaking destinations does your agency offer and which of them, if offered by New Zealand, would help to promote the destination?

