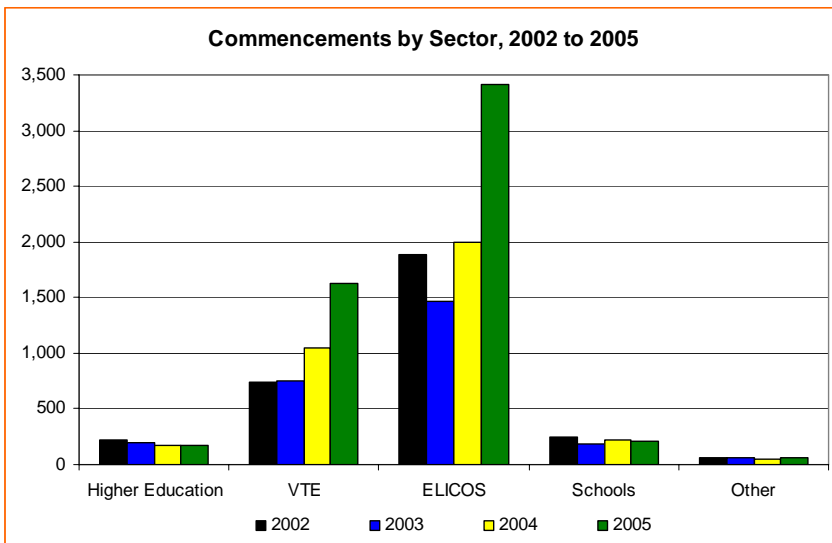




## Brazil

Brazil has one of the fastest growth rates of enrolments and commencements of any sizeable market for Australian education, particularly for the English Language Intensive Courses for Overseas Students (ELICOS) and Vocational and Technical Education (VTE) sectors. It is the fifth largest country in the world, both in land mass and population, with over 180 million people. Brazil is the world's 12<sup>th</sup> largest economy.

Brazil is by far the largest market for Australian education and training in Latin America. Between July 2004 and July 2006, the number of Brazilian enrolments by students on a student visa in Australian programmes grew by 109%. ELICOS institutions recruit a sizeable number of Brazilians on student visas—English Australia<sup>1</sup> reports that 74% of Brazilians studying ELICOS programmes in Australia are on a student visa compared with 49% across all nationalities in the sector. At the same time, local agents suggest that the number of Brazilians studying in competitor countries, specifically the USA, the UK and New Zealand, is declining.



Brazil currently has a potential market of 250,000 prospective students who could enrol in studies overseas, according to research published by BELTA, the Brazilian English Language and Travel Association. In 2004 only 17% of prospective students – 42,000 Brazilians – studied overseas, most of them in English-speaking countries.

At current growth rates, and providing the economy remains stable, Brazil has the potential to become Australia's largest source of international student enrolments outside Asia during 2007.

### ELICOS

- Brazil is the fifth largest source country for ELICOS enrolments, and the largest outside Asia, growing 67% in 2005 from 2004 and 62% from January to July 2006 compared to the same period in 2005.
- The average number of student weeks studied by Brazilian ELICOS students, according to English Australia, was 13.9 weeks in 2005.
- The number of student weeks increased by 81% in 2004 over 2003, and by a further 98% in 2005.
- ELICOS is the dominant sector for Brazilian students, with 56% of all enrolments in 2005.
- The majority of enrolments (84%) were in New South Wales and Queensland institutions.

	2002		2005		Growth 2002 to 2005
	Number	Ranking	Number	Ranking	
Commencements	3,155	12 <sup>th</sup>	5,505	10 <sup>th</sup>	74.5%
Enrolments	4,198	13 <sup>th</sup>	7,052	12 <sup>th</sup>	68.0%

### Schools

- Brazil is the second largest source country outside Asia, although enrolments are lower than at their peak five years ago.
- Schools are a short-term study abroad market, with students enrolling for 6 to 12 months, mostly in years 10 and 11.
- 68% of all enrolments are in Queensland institutions.

### Higher Education

- Brazil is the second largest source of full degree students from Latin America. Nevertheless, the proportion of Brazilians in Higher Education programmes remains low, accounting for no more than 6% of Brazilians studying in Australia.
- During January to July 2006, enrolments were up by 10% and commencements by 34%, compared to the corresponding period in 2005.
- 58% of enrolments were postgraduate, mainly at the Masters by Coursework level, while 42% were for undergraduate programmes.

### VTE

- Brazil is Australia's eighth largest source country for VTE enrolments and the largest outside Asia.
- VTE is the second largest sector for Brazilian students, with 34% of all Brazilian enrolments in 2005.
- The growth rate from January to July 2006 was 56%, compared to the same period in 2005.
- The fields of study that are attractive to Brazilians are business, information technology, telecommunications, tourism and hospitality and design. There is opportunity for further growth in this sector.
- 73% of enrolments were in New South Wales institutions.

The majority of Brazilian enrolments (85%) are in New South Wales and Queensland institutions – accounting for 52% and 32% of all enrolments respectively. Enrolments in Western Australia have grown compared to the previous year, now accounting for 9% of the overall students, while Victoria receives 5% of all enrolments.

<sup>1</sup> English Australia Survey of Major ELICOS Regional Markets in 2005.