

## ASSOCIATION NAME

## COUNTRY

National Report for FELCA AGM – 2012

### AGENTS & Associations

There are around 300 agents in Brazil. But many of them are branch or franchise of BELTA members. And some of them are small agencies or travel agencies that sell other tourism services other than only educational programs.

BELTA congregates 72 organizations, and 55 of them are agents making an account of approximately 600 point of sales in Brazil, 36 of them offer also inbound programs in the country. They represent around 90% of the international education market here.

Belta did a research last year. When we could notice that the owners and managers have 95,8% higher education or post graduated studies, 62% are female and 38% are male, and 55% are from 25 to 44 years old.

Moreover São Paulo (Capital) has the great concentration of agencies: 40,9%, the second is Minas Gerais: 15,5%, followed South of Brazil: 9,9%, São Paulo countryside: 9,8%, Rio de Janeiro: 8,5%, Northeast: 7%, Midwest: 5,6% and a few in the North: 2,8%.

Many of the companies are very well established in the market: 42,3% were created more than 15 years ago.

Finally, the research conclusion said that the market of educational agencies in Brazil is highly concentrated and about 10 companies represent nearly 90% of the students' volume sent abroad for courses.

### Market Growth/Decline

As last year, Brazilian economy is an important moment. The Real (Brazilian currency) has risen in comparison to US dollar until May 2012, when it increase a little. Besides an international experience is becoming more popular among young people and preparing them for the work market. For this reason, language programs are raised while work & travel programs are declined.

On the other hand the Brazilian market growth with clients from middle class looking for an opportunity to study in others countries. Because the Real is stronger in comparison with other currencies and the condition for paying in instalments, the agencies have 40% clients from middle class (Belta Research 2011).

According to the Belta Research, 2010 was the better year for the agencies. They sent 170.000 students with an investment of US\$ 1,160 billion. For 2011 the research estimates 217.000 students with an investment of US\$ 1,500 billion.

The Brazilian market for Education International has grown 638% in the last nine years.

The optimistic expectation for 2012 is growing 30% the number of Brazilian students will travel for outbound programs. It means 283 thousand Brazilian students going abroad. And the conservative projection is increasing 15% with 221 thousand Brazilian students travelling for outbound programs this year.

### Visa regime – any new difficulties?

Since many years, BELTA has a strong relationship with the Consulates and Embassies of US, UK, Canada, New Zealand, Australia, South Africa, Spain and others. They contact BELTA for training the agencies.

As usual, many Embassies and Consulates as well as official education organizations take part of our fair (ExpoBelta) this year with booths and lectures about student visa and educational system as US, Australia, New Zealand, Sweden, France, Holland, Ireland, Canada, and European Union Delegation in Brazil. Saturday morning before ExpoBelta, Spain Consulate did training for BELTA's associates as happened last year.

Particularly US Consulate is working very close with BELTA and offering visa training to the BELTA members.

Nowadays there is less restriction visa for Brazilian students. However student has to be a genuine student. The visa authorities count on BELTA members support for enrolling genuine students. For this reason the relationship is keeping strong.

#### Government Relations – any developments with your or other governments?

Since seven years ago, BELTA is responsible of the Brazilian Exchange Club with the support of EMBRATUR. The purpose of this partnership is to internationally promote Brazilian programs that focus on foreign students through the promotion of the programme "Study in Brazil", which aims promoting the opportunities of studies in Brazil overseas, consolidating the country as an important educational destination.

BELTA, via Brazilian Exchange Club, was the responsible for the Brazilian universities participation in NAFSA 2012. The Brazilian booth had 28 educational institutions, many of them the best reputation universities in the country.

On the other hand BELTA is signing a Technical Cooperative Agreement with EMBRATUR. BELTA will then be responsible for the commercialization and actions for promoting Brazil into the Educational Market starting at the end of September 2012 for the next two years.

Besides the mission of conquering overseas market, the Brazilian Exchange Club is also responsible for giving orientation to its associates so that the concept of the program is kept, a uniform conduct exists and the offered services are provided within the highest quality.

#### Other key issues for the industry?

The BELTA Research 2011 has had fantastic results. The most important medias in Brazil has seen the association as source of information in the Education International market. Every week we receive the contact of these medias for providing numbers and trends. Globo, the most important TV of the Brazil, was in the breakfast that it was launched and they spread the information all over the country.

As last year, "Exchange" is a great agenda for Brazilian media and BELTA is the contact for all information. The Board of Directors give interviews many times.

#### Initiatives/Developments for your association?

This year BELTA is celebrating 20 Years and we are very proud with all things the association could archive in this time. We are organizing a celebration with the support of Tourspain in August. There will be also the entrance into the new BELTA's Board of Directors.

BELTA's Board of Directors objective is to continuing a more participative performance of the members through famtrips, trainings, meetings and regional activities; maintain and improve the relationship with consulates and international organizations; seek sponsors; strengthen BELTA products – BELTA Magazine, ExpoBelta that last edition has New Zeleand as the Guest of Honor with 19 universities at the fair, space for interaction activities with the students and an auditorium for exclusive lectures and BELTA Online; promote the I BELTA National Workshop with the participation of the owners and directors of the agencies members; a Photography Competition for Brazilian students in the Facebook; make a BELTA Research 2012. The outcome of the actions will be to have Belta seal as top of mind of the Brazilian consumer when buying services abroad of quality, and therefore extend this seal to the international partners, who are the final link to serve the Brazilian students.

In the last BELTA Annual Meeting in the Alphe Latin America, the rules for becoming member change and it is more restrictive in order to keep the high quality of the associates.

The new portal – BELTA Online - with new features available to reach the student was launched and it is a great success among the public.

### Felca Agency Accreditation Code

BELTA promotes FELCA among its members providing information about the Felca Agency Accreditation Code as well as highlighting the importance of the Federation and sending its logo by e-mail and in the monthly newsletter. Many of BELTA members has already included the logo in their promotional material.

With the support of FELCA, BELTA had a breakfast meeting, previously schedule in Brazil with four Colombian agents on March 1<sup>st</sup> of 2012, in order to contact the Colombian agents who are trying to organize a new association. Presently Carlos Hurtado from Educaminos is in charge of the association. He said they produced an Ethic Code on Belta's Ethic Code. The association – Agecol – was already registered in the Colombian Government Department that takes care of it.

After giving all details about BELTA, we gave the information about FELCA as well as the folder and explained how the Federation works in order to support their members, stating why we were members and the benefits from it. They were very much interested. They understood how important is to be part of an international organization after they organize the Colombian association.

After BELTA to Bogota they have already had their first official meeting/assembly. They see with a very optimistic view other Colombian agencies besides the eight founders become members.