LATAM Unlocked: Growth by Design Through Strategic Ecosystems
Built on Trust. Driven by Data

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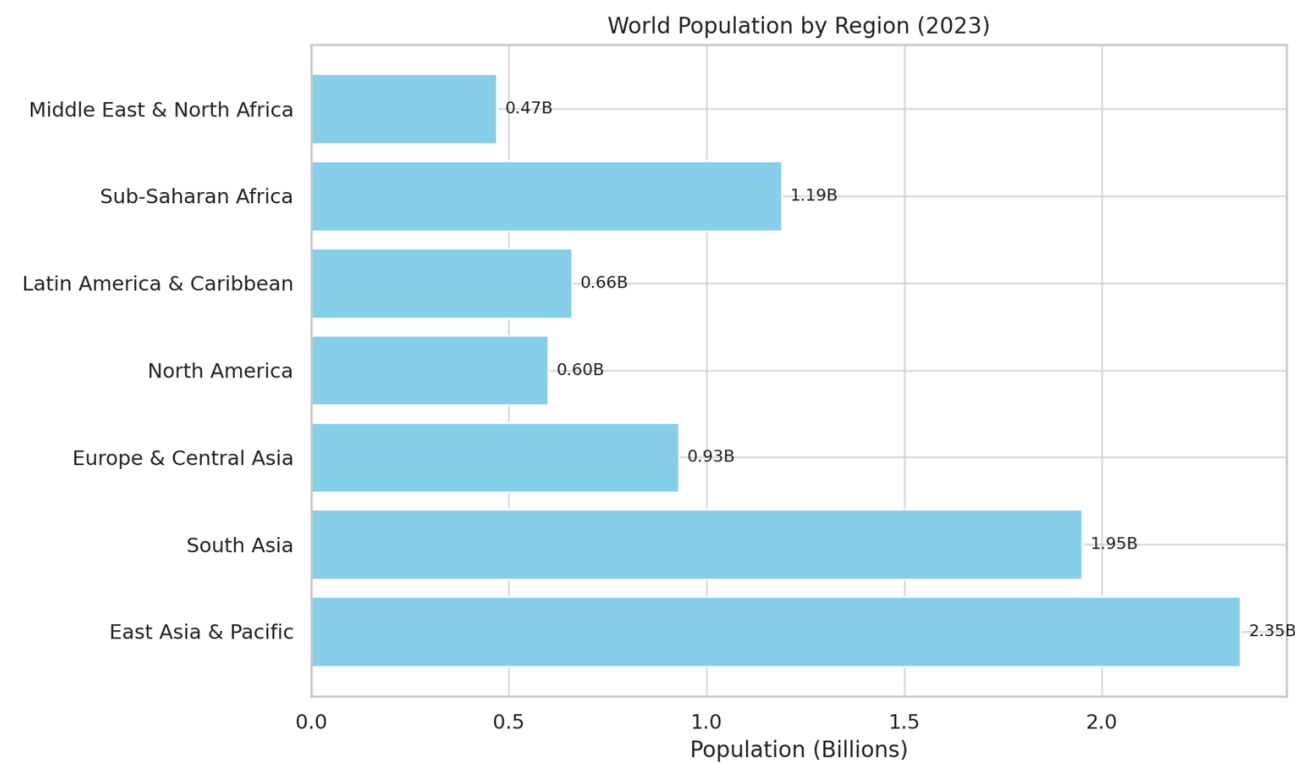
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LATAM AT A GLANCE

- **Geographical Scope - 33 countries** across **South America**, **Central America**, and the **Caribbean**

- **Population**.- 667M – 8% Word Population, Brazil (211M), Mexico (128M)

- **Language & Identity** – **Spanish** and **Portuguese**, and Many indigenous languages and English

- **Economy & GDP** - US$ 6.06T **(6% of global GDP** - 2023) - Key economies: **Brazil**, **Mexico**, **Argentina**, **Chile**, and **Colombia**

- **Culture, Music & Habits -** From **samba**, **cumbia, salsa,** and **reggaeton** to **tango** and **bossa nova**, LATAM is rhythmically gifted.

- **Diversity -** A unique blend of **Indigenous**, **African**, **European**, and **Asian** heritage

- **Regional Identity -** The term **LATAM** unifies countries across three regions, **South America**, **Central America**, and the **Caribbean**

- **Youth & Demographic Shift - Aging population** in countries are growing

- **Urbanization & Megacities - 80% of LATAM's population** lives in cities, making it one of the **most urbanized regions** globally.

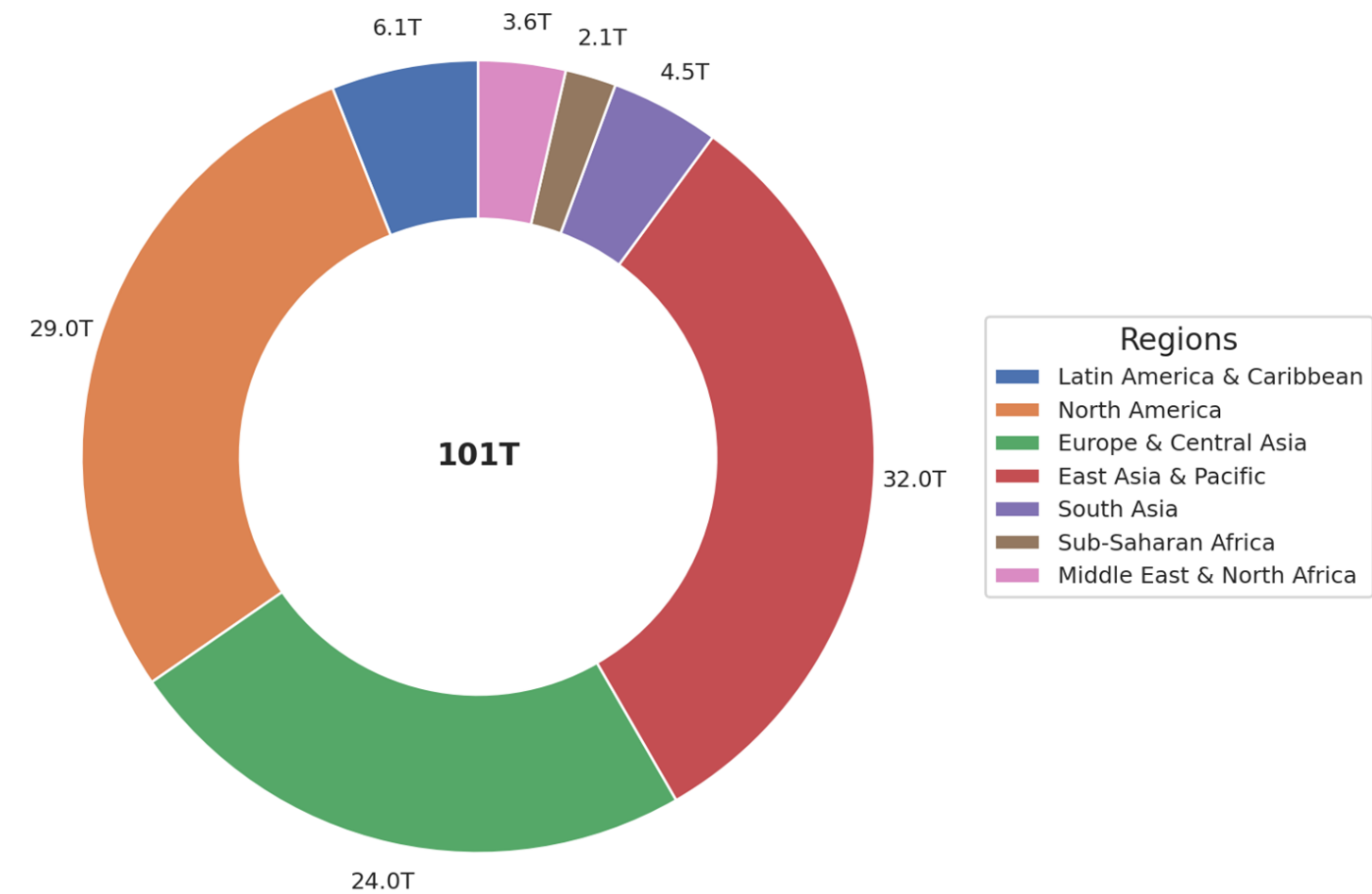- **LATAM is not for beginners - complexity, contradictions, and intensity***

Population x GDP

GDP Share by Region (World Bank & IMF 2023)

World Population by Region (2023)

World in 2050 - GDP

falling to 10th place, while Indonesia could rise to 4th place by 2050 (see Figure 2). By 2050, six of the seven largest economies in the world could be today's emerging economies in PPP terms according to our projections.

Figure 2: **Projected GDP rankings (at PPPs)**

2016	2030	2050
China, 1		China, 1
United States, 2		India, 2
India, 3		United States, 3
Japan, 4		Indonesia, 4
Germany, 5		Brazil, 5
Russia, 6		Russia, 6
Brazil, 7		Mexico, 7
Indonesia, 8		Japan, 8
United Kingdom, 9		Germany, 9
France, 10		United Kingdom, 10
Mexico, 11		Turkey, 11
Italy, 12		France, 12
South Korea, 13		Saudi Arabia, 13
Turkey, 14		Nigeria, 14
Saudi Arabia, 15		Egypt, 15
Spain, 16		Pakistan, 16
Canada, 17		Iran, 17
Iran, 18		South Korea, 18
Australia, 19		Philippines, 19
Thailand, 20		Vietnam, 20
Egypt, 21		Italy, 21
Nigeria, 22		Canada, 22
Poland, 23		Bangladesh, 23
Pakistan, 24		Malaysia, 24
Argentina, 25		Thailand, 25
Netherlands, 26		Spain, 26
Malaysia, 27		South Africa, 27
Philippines, 28		Australia, 28
South Africa, 29		Argentina, 29
Colombia, 30		Poland, 30
Bangladesh, 31		Colombia, 31
Vietnam, 32		Netherlands, 32

Sources: IMF for 2016 estimates (updated for Turkey due to recent major statistical revisions), PwC projections for 2030 and 2050

5 — Brazil

7 — Mexico

29 — Argentina

31 — Colombia

- 32 countries, accounting for around 85% of world GDP

- Part of the seven largest emerging economies - Brazil and Mexico

- Argentina & Colombia, projected to be the fastest growing and ahead of many mid-tier economies.
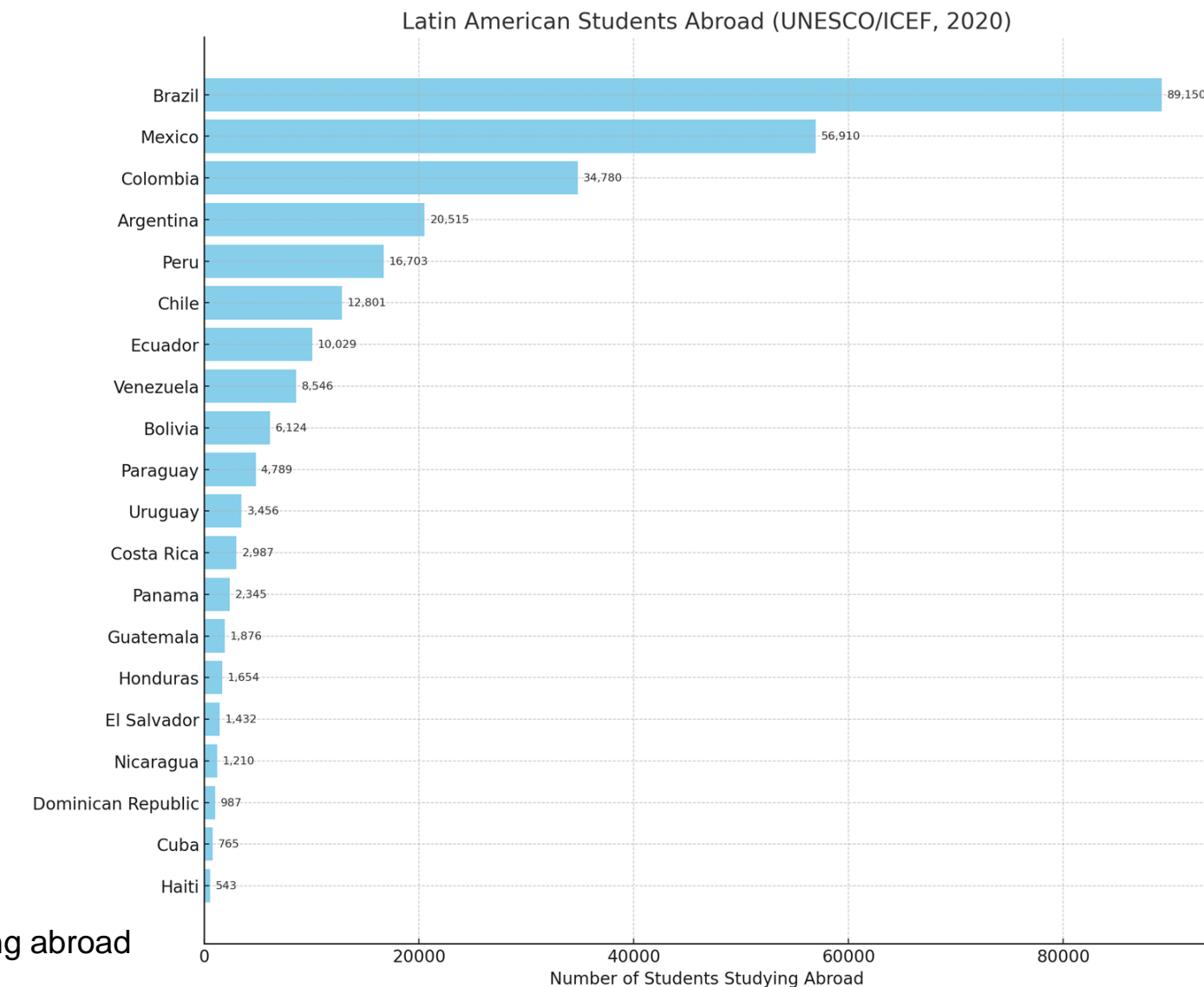
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LATAM Student Outbound

Rank	Country	
1	**Canada**	Fastest-growing destination; large increases from Brazil, Mexico
2	**United States**	Historically dominant, still strong for Brazil, Colombia, Mexico
3	**Spain**	Popular due to language and historical ties
4	**Australia**	Attractive for Colombia & Brazil; strong growth pre-pandemic
5	**Portugal**	Especially strong for Brazilians
6	**United Kingdom**	Gaining attention due to scholarships and English-medium programs
7	**Germany**	Increasing popularity for affordable tuition and strong STEM fields

195K studying abroad

Latin American Students Abroad (UNESCO/ICEF, 2020)

Country	Number of Students Studying Abroad
Brazil	89,150
Mexico	56,910
Colombia	34,780
Argentina	20,515
Peru	16,703
Chile	12,801
Ecuador	10,029
Venezuela	8,546
Bolivia	6,124
Paraguay	4,789
Uruguay	3,456
Costa Rica	2,987
Panama	2,345
Guatemala	1,876
Honduras	1,654
El Salvador	1,432
Nicaragua	1,210
Dominican Republic	987
Cuba	765
Haiti	543

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LATAM High School Overview

	High Schools	Private HS	Students in HS	Students in Private HS	IB Program	IB Students	University Entry Exam	English Rank 25 Y avg/ 45% men
Brazil	29K	14K	7.7M	3.9M	42	1050	5M	58
Argentina	22K	6,2K	4.4M	1.6M	52	1300	1.6M	30
Colombia	22K	9.2K	4.5M	1M	59	1475	529K	77
Chile	3.8K	2.1K	1.2M	500K	26	650	246K	45
Mexico	27K	9.5K	5.3M	800K	80	2K	2.5M	88
Peru	17K	4.2K	2.8M	1.4M	77	1925	260K	51
Ecuador	3.8K	1.3K	1.9M	350K	77	1925	155K	82
Market Size	122.6K	46.5K	32.9M	12.7M	413	10K	10.3M	Moderate avg

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Brazil Higher Education

25.8% of Brazilian Students (Public)

74.2% of Brazilian Student (Private)

In 2019, **2.1 m** students enrolled in 337 Public HEIs

6.4 m students enrolled in 2,152 Private HEIs in 2019

2023 – **9.9 m**

Higher Education BR

- Health Sciences — 17%
- Social Science — 14%
- Engineering — 14%
- Natural Sciences — 10%
- Humanities — 8%
- **Business and Administration** — 14%
- Law — 10%
- Education — 9%
- Arts — 2%
- Others — 3%

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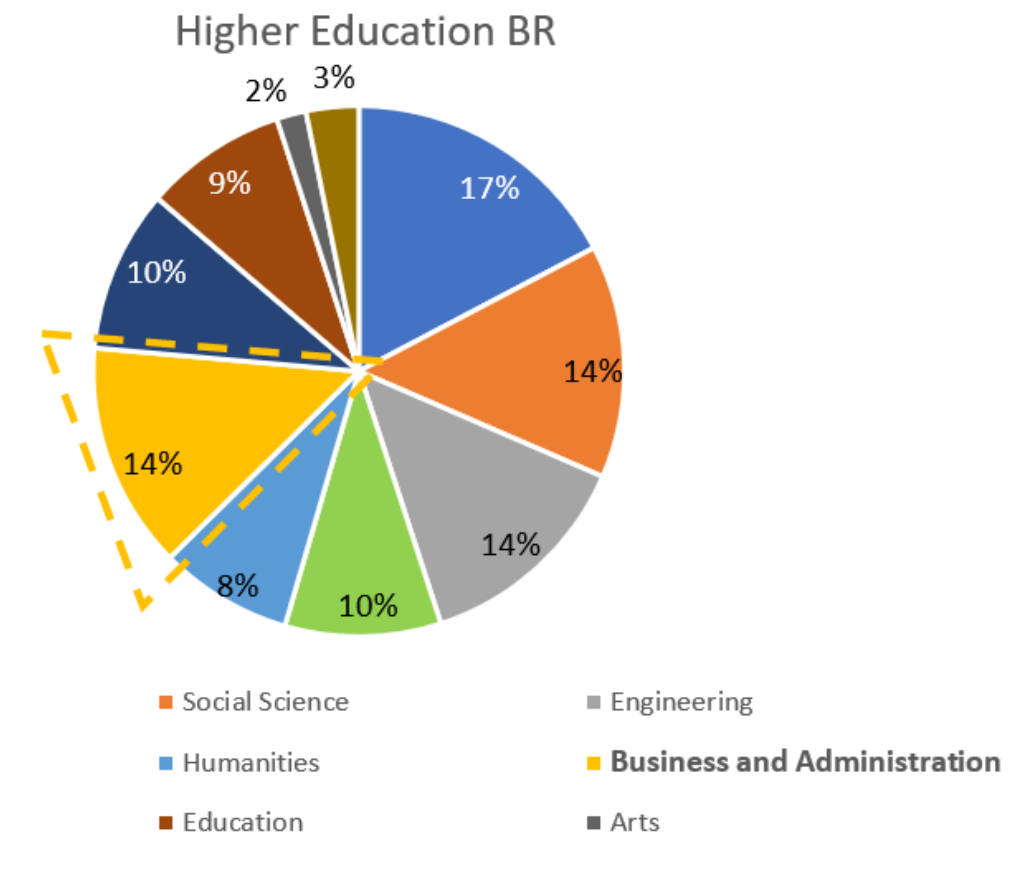
International Baccalaureate

Región de Desarrollo IberoAmericana del IB

- ANDORRA
- ANTILLAS NEERLANDESAS (ARUBA, BONAIRE, CURACAO, SABA, SINT MAARTEN, SINT EUSTATIUS)
- ARGENTINA
- BELIZE
- BOLIVIA
- BRASIL
- CHILE
- COLOMBIA
- COSTA RICA
- CUBA

- ECUADOR
- EL SALVADOR
- ESPAÑA
- GUIANA FRANCESA
- GUATEMALA
- GUYANA
- HONDURAS
- MEXICO
- NICARAGUA
- PANAMA
- PARAGUAY
- PERU
- PORTUGAL

- PUERTO RICO
- REPUBLICA DOMINICANA
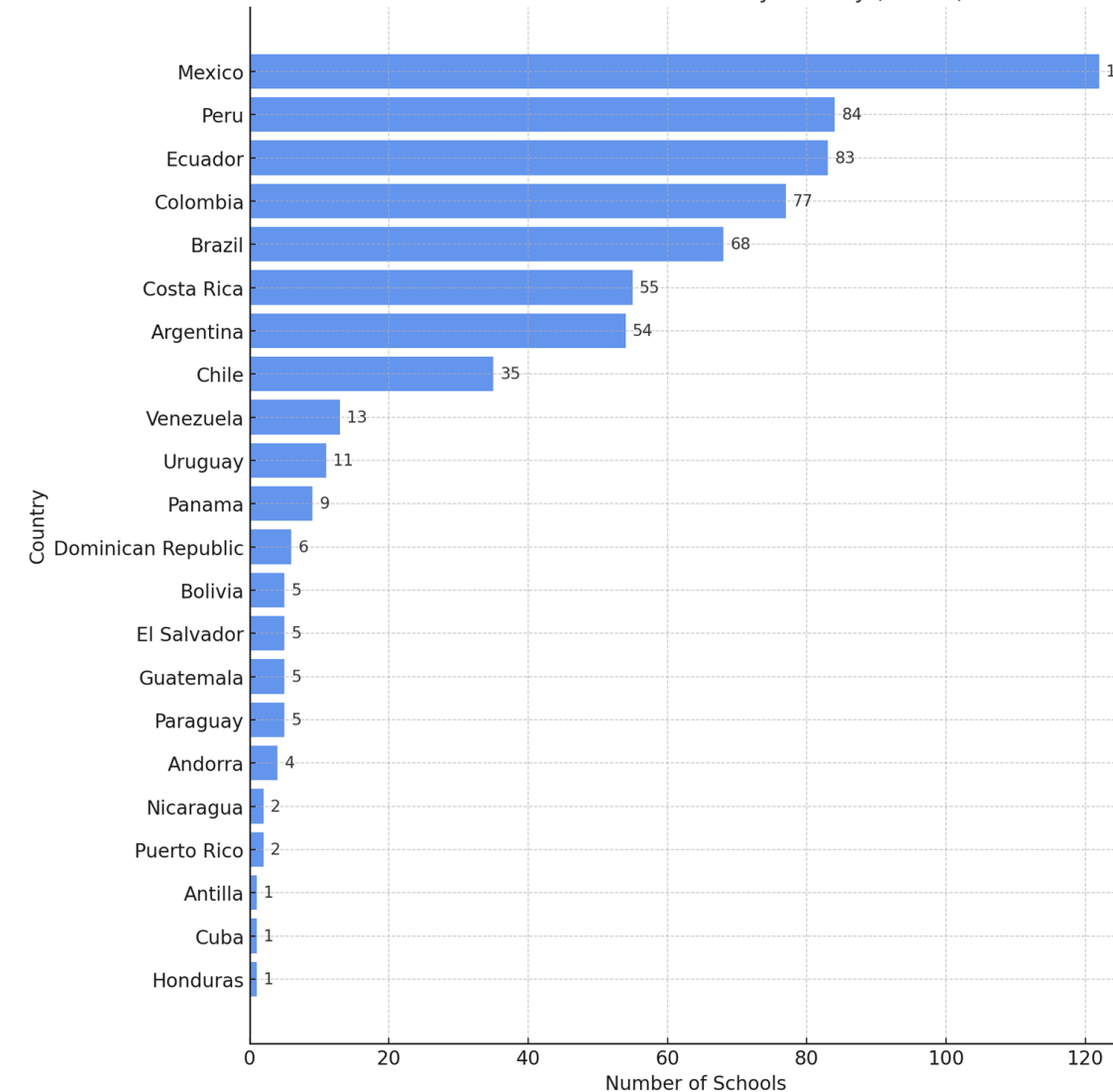- SURINAM
- URUGUAY
- VENEZUELA

#IBDayIBeroAmerica

27 Countries

648 Schools

Number of IB World Schools by Country (LATAM)

Country	Number of Schools
Mexico	122
Peru	84
Ecuador	83
Colombia	77
Brazil	68
Costa Rica	55
Argentina	54
Chile	35
Venezuela	13
Uruguay	11
Panama	9
Dominican Republic	6
Bolivia	5
El Salvador	5
Guatemala	5
Paraguay	5
Andorra	4
Nicaragua	2
Puerto Rico	2
Antilla	1
Cuba	1
Honduras	1

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https://www.ibo.org/programmes/find-an-ib-school/

International Baccalaureate

Joinville, Brazil
April 12, 2025

Contact: elsa.ramos@ibo.org

International Study Programs

ISP Schools by Region

- Asia 23.5%
- Europe 22.4%
- Middle East 10.6%
- North 15.3%
- LATAM 28.2%
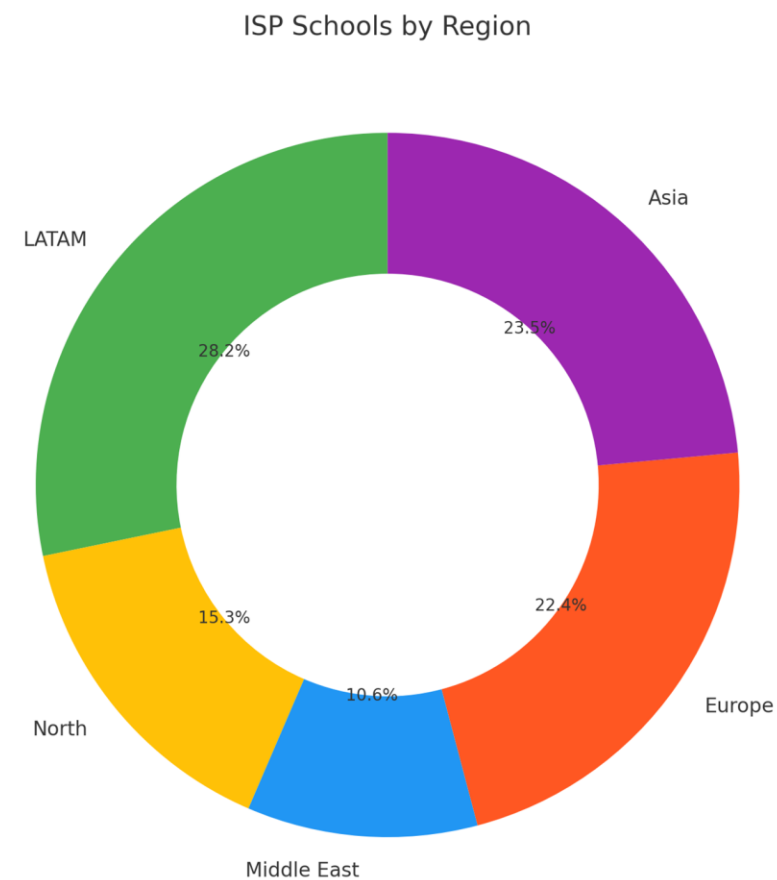
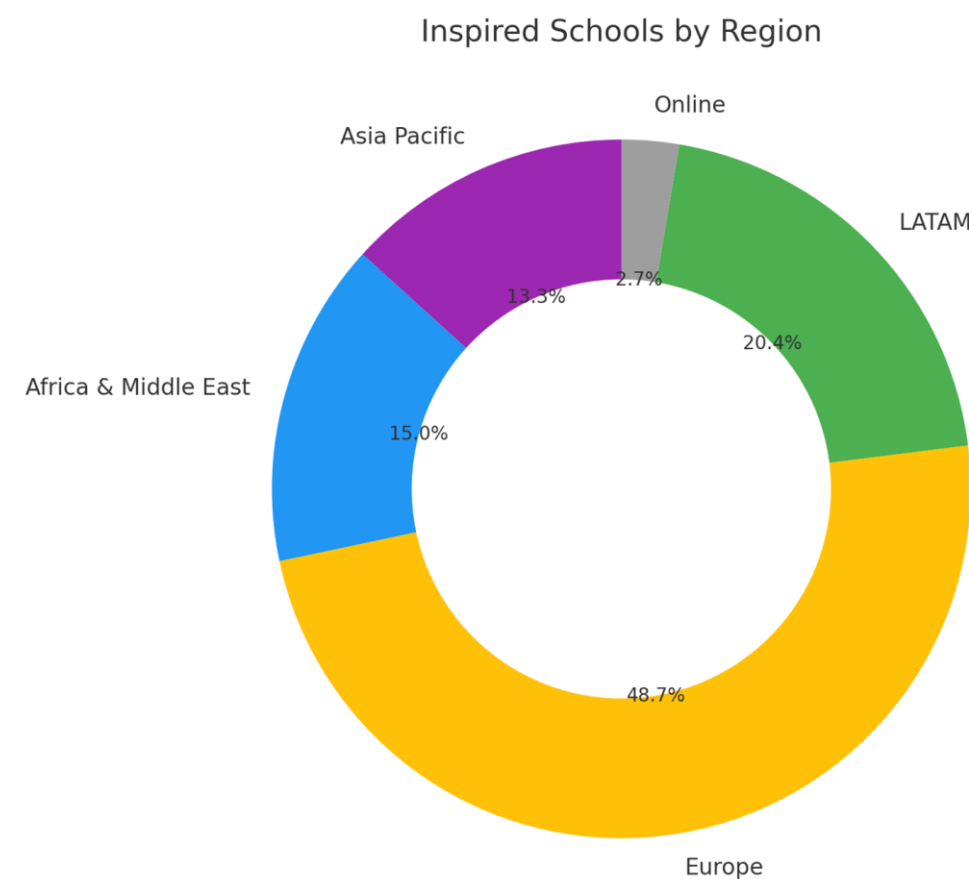| 92K	105	25	24	11
TE	Schools	Countries	LATAM	Mexico

- ISP has expanded into South America, welcoming new schools in Colombia, Ecuador, and Chile.
- BIS joined 2024

https://internationalschoolspartnership.com/

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Inspired Education Group

Inspired Schools by Region

- Online 2.7%
- LATAM 20.4%
- Europe 48.7%
- Africa & Middle East 15.0%
- Asia Pacific 13.3%

90K	118	24	23	11
TE	Schools	Countries	LATAM	Brazil

- Inspired Education Group acquired Escola Eleva Global Schools in May 2022.
- March 2025 invested USD 500 MM in Brazil
- Online HS 2025
- Owns schools outright, no franchising; standardized Backed by Oakley Capital.
- Operations in Brazil, Bahamas, Panama, Peru, Colombia, Mexico

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Cognita Schools

Cognita Schools by Region
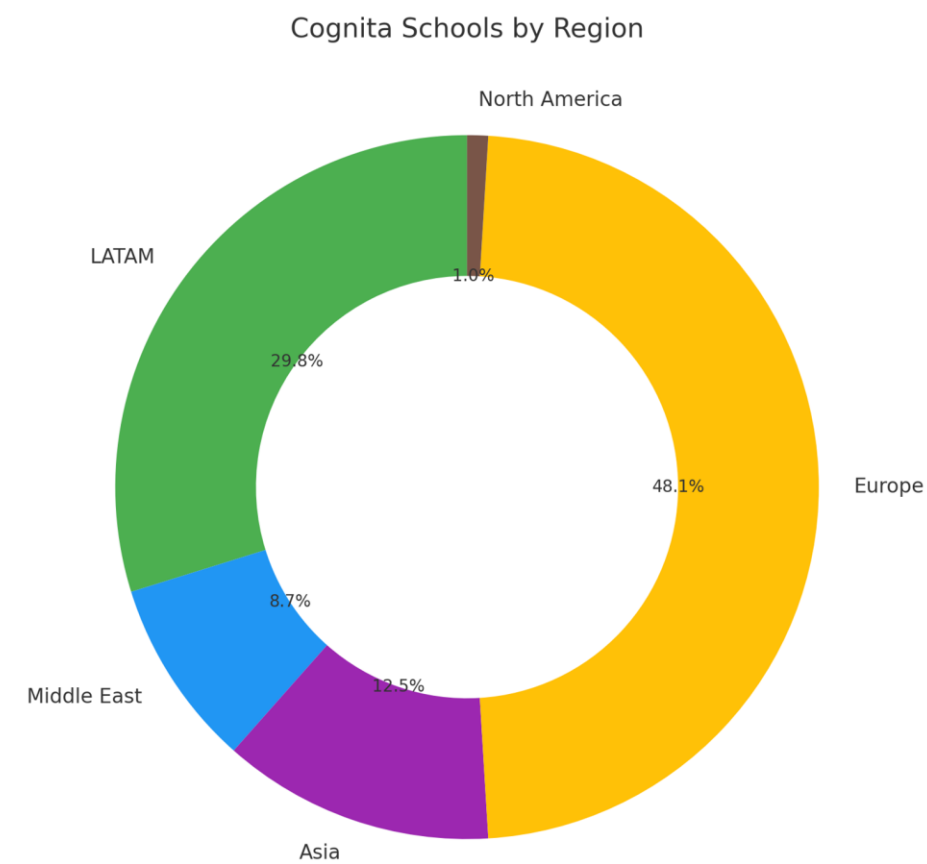
95K	100+	17	31	17
TE	Schools	Countries	LATAM	Chile

- Expanding its presence in LATAM through strategic alliances and initiatives
- Operation: Brazil, Chile, Colombia, Mexico

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Nord Anglia

Nord Anglia Schools by Region

- United States
- Middle East
- Other Americas (LATAM)
- Asia
- Europe
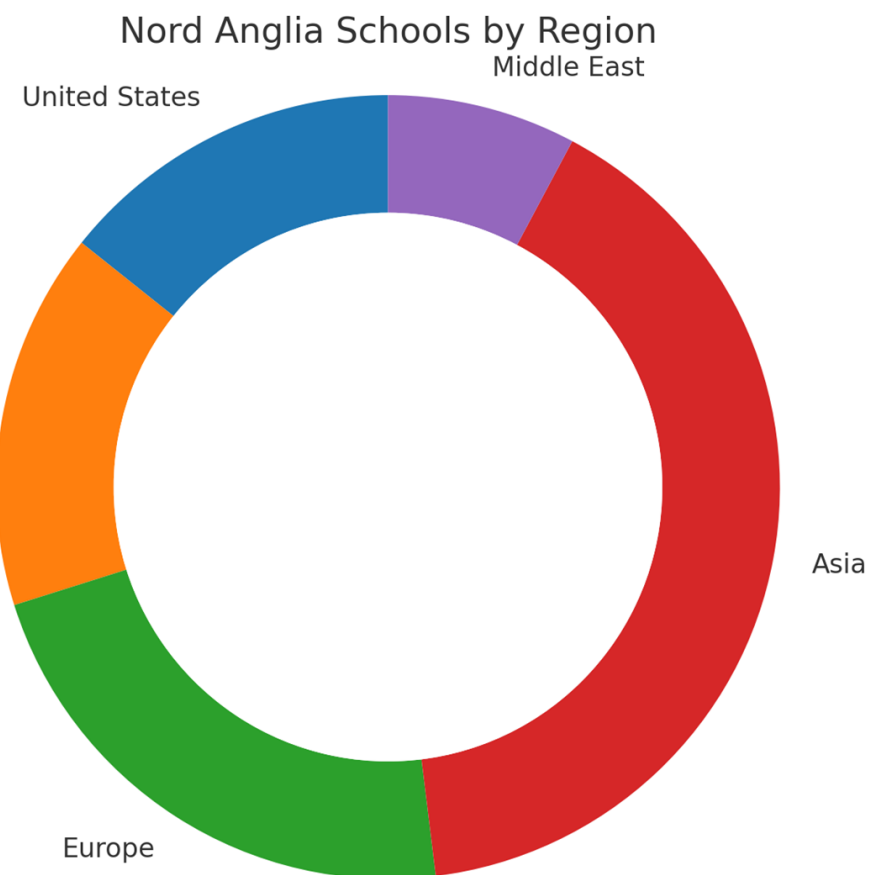
85K	80+	87	12	3
TE	Schools	Countries	LATAM	Brazil

- In February 2025, Nord Anglia Education welcomed Kipling School, Mobile in 2024, Avenues in Oct 2023.

https://www.nordangliaeducation.com/

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Grupo SEB

Grupo SEB / Maple Bear Presence in LATAM

Countries
- Brazil
- Mexico
- Peru
- Guatemala
- Costa Rica
- Paraguay
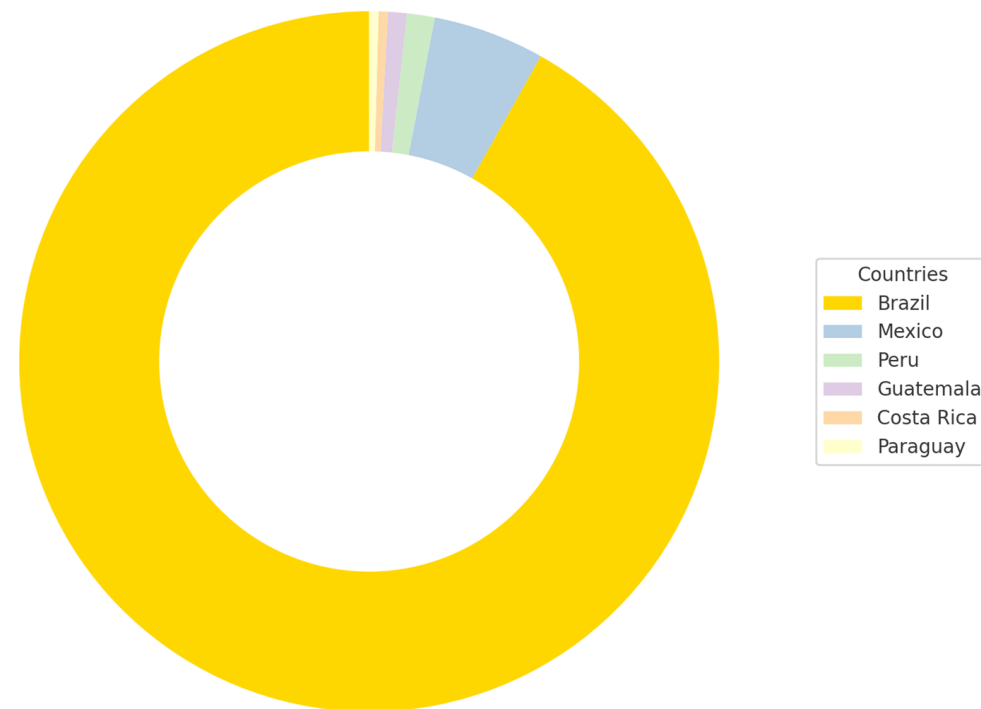
60K	450+	39	7	231
TE	Schools	Countries	LATAM	Brazil

- Grupo SEB has acquired 100% of Maple Bear, to double the number of schools and reach 250K students globally within 5 year. Added a 20% investments in Colombia. Carolina Patricio, Pueri Domus, Sphere, Concept, AZ

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ICEF LATAM - Miami

240+ Agents | **330+** Providers | **40+** Countries

Miami, USA
December 8 - 10, 2025

1. Colombia
2. Brazil
3. Mexico
4. Ecuador
5. Peru
6. Argentina
7. Bahamas
8. Barbados
9. Bolivia
10. Chile
11. Costa Rica
12. Dominican Republic
13. El Salvador
14. Guatemala
15. Honduras
16. Jamaica
17. Nicaragua
18. Panama
19. Trinidad & Tobago
20. Uruguay
21. Venezuela

Agent segment interest

Segment	Percentage
Language courses	87%
Career / vocational programmes	76%
Undergraduate programmes	73%
Additional programmes and services	72%
Grad / postgrad master	68%

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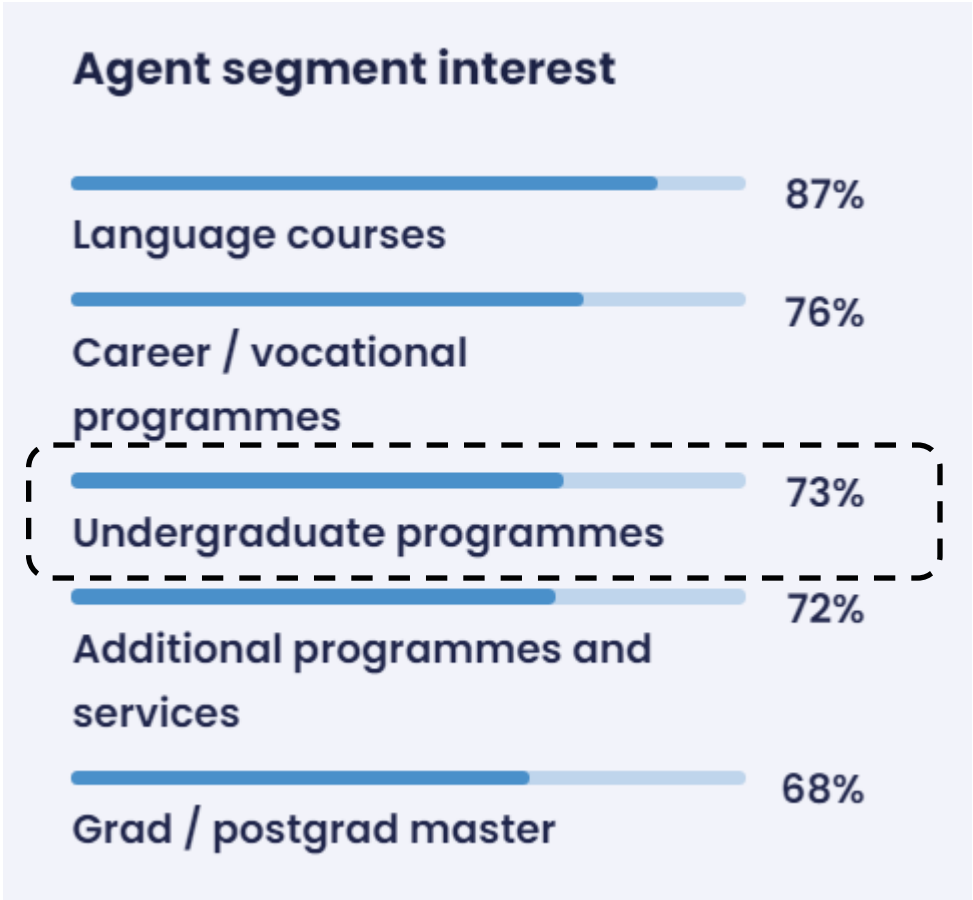
Central American College Tours

- **High School Rotation**

- **Strive Scan**

- Ocean to Ocean/ PASCA - Panama

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College Fairs - Brazil

12 Apr - IC3 Brazil Forum - School of the Nations - School of the Nations - DF

7 Jun - Lycée International Français de São Paulo - SP

15 Aug - Coree International School Fair -

25 Aug - Colégio CAVE - MG

26 Aug - Escola Eleva Urca Fai - RJ

27 Aug - Our Lady of Mercy School Fair - RJ

28 Aug - Escola Eleva - Barra da Tijuca Fair - RJ

29 Aug - Escola Carolina Patrício Fair - RJ

30 Aug - Maple Bear Valinhos - Valinhos - SP, 13278-510, Brazil

30 Aug - Escola Concept São Paulo - SP

30 Aug - Colégio Miguel de Cervantes - SP

TBC Sep - Beacon School Fair – SP

4 Sep - Escola Móbile Fair - SP

5 Sep - Escola Americana de Campinas Fair - Campinas – SP

5 Sep - Colégio Etapa Valinhos Fair - Valinhos - SP

6 Sep - Colégio Etapa Vila Mariana Fair – SP

10 Sep - Magister - SP

10 Sep Coree International School - Joinville - SC

11 Sep - St. Francis College Fair - SP

15 Sep - Villa Global Education Fair Day 1- Salvador - BA

16 Sep - Villa Global Education Fair Day 2 - Salvador - BA

18 Sep - Great International School - PI

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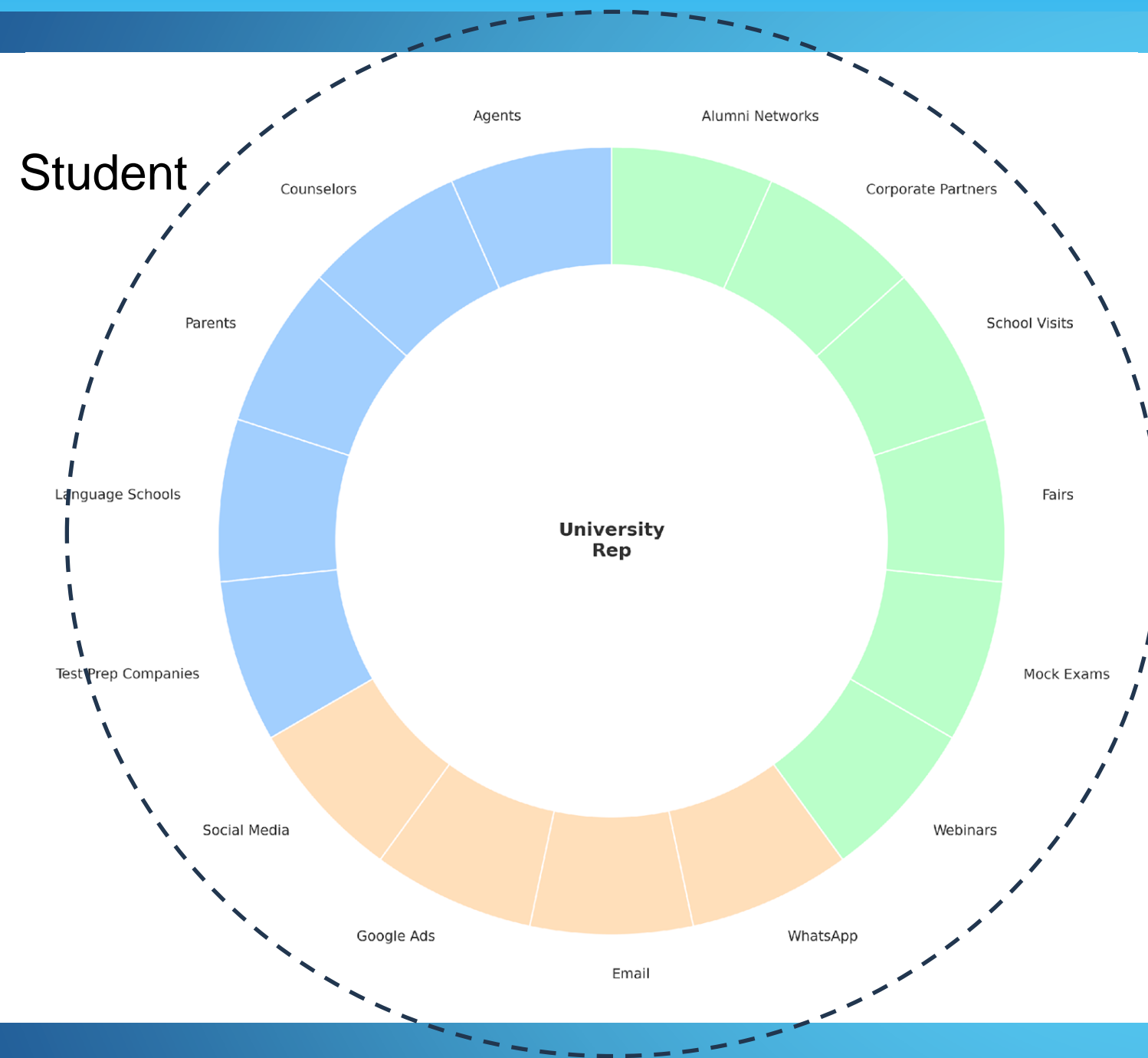
Mexico College Fair

September

17 - 27 September 2025

S	M	T	W	T	F	S
14	15	16 🇲🇽 Mexican Independence Day 🇲🇽	17 Colegio Americano de Puebla	18 John F. Kennedy School Querétaro	19 The American School of Tampico	20 Colegio Americano de Torreón (pending)
21	22 American School of Puerto Vallarta	23 The American School Foundation Guadalajara	24 The American School Foundation Monterrey	25 Greengates (morning) and Edron Academy (afternoon) CDMX	26 ASF (morning) and Eton (afternoon) CDMX	27 TAE CDMX

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Recruitment Ecosystem

Student

University Rep

- Agents
- Alumni Networks
- Counselors
- Corporate Partners
- Parents
- School Visits
- Language Schools
- Fairs
- Test Prep Companies
- Mock Exams
- Social Media
- Webinars
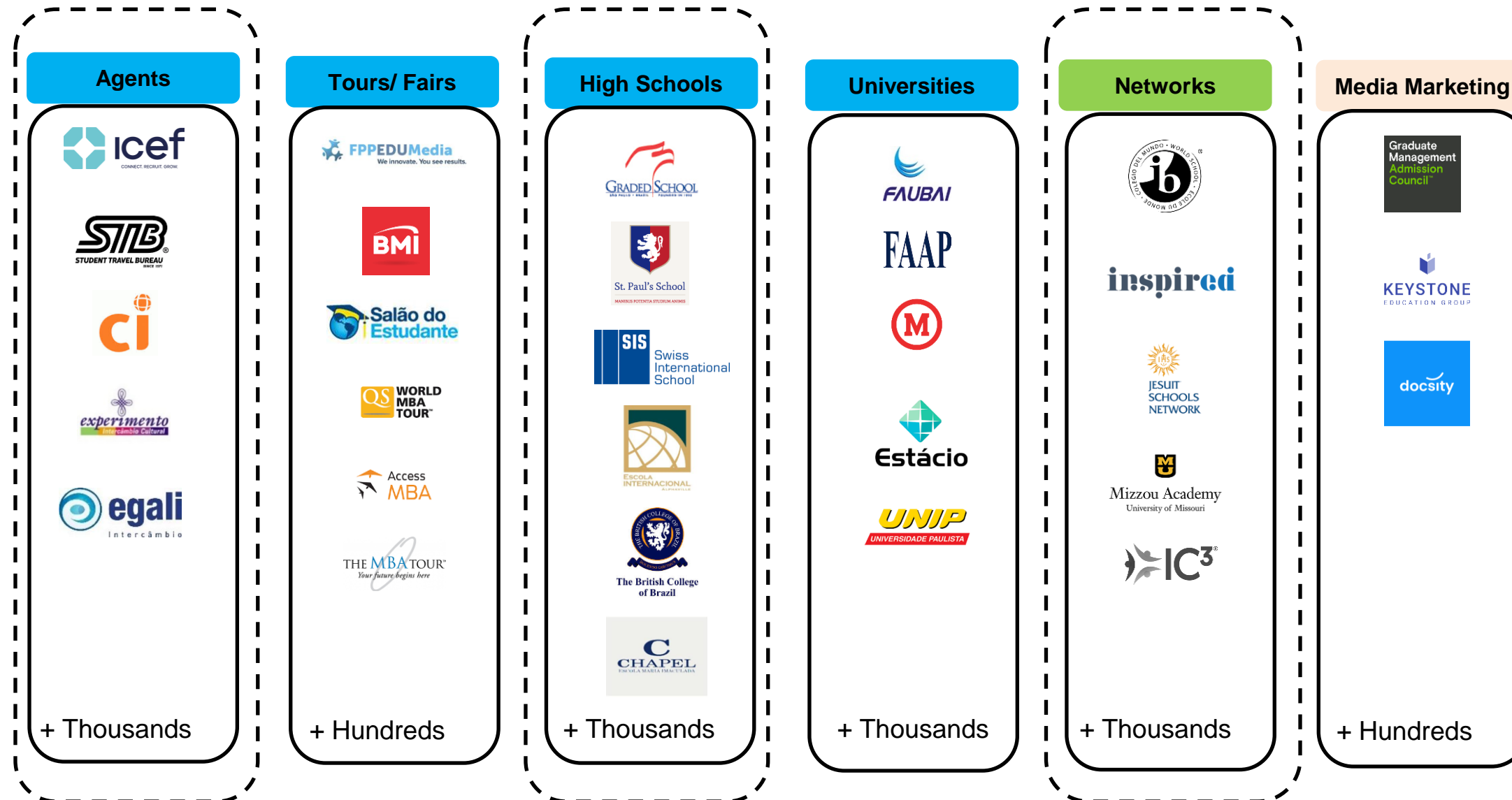- Google Ads
- WhatsApp
- Email

Primary Channels

- 🔵 Human – Relationship Driven
- 🟠 Digital – Scalable Outreach
- 🟢 Engagement – Value-added Strategies

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Strategy by Design

Agents	Tours/ Fairs	High Schools	Universities	Networks	Media Marketing
+ Thousands	+ Hundreds	+ Thousands	+ Thousands	+ Thousands	+ Hundreds

- Budget x no budget
- UG x PG
- World x LATAM x Brazil
- Define your priorities
- 'If you don't know where you're going, any road will take you there.'
- 80/20

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Pitch Yourself*

- Research the school and counselor priorities.

- Be clear on what makes your university stand out.

- Show how you support students, not just promote programs.

- Share real examples that counselors and students can relate to.

- Offer value year-round (events, updates, support).

Build Real Relationships 🤝

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Connect – Add Value – Stay Top of Mind (How To)

Stage	Goals	F2F	Online
First Contact	Start the Relationship	School visit, fair, intro, coffee	Personalized email, LinkedIn
Add Value	Show you are helpfull	Handouts, resources	Deadlines, scholarships, rankings
Stay Visible	Keep relationship active	Event follow-up, return visits	Monthly email, webinars, updates
Deepen Trust	Become Go-to-rep	Co-host events, meet ups	Tailored Q&As, FAQs, alumni

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Time x Trust

Sector	Start biz	Gain referrals	Build Trust
Sales In-person/ online	3-5 hrs 10-15 hrs	6-8 hrs 15-20 hrs	5-7 Interactions
Education In-person/ online	3-5 hrs 10-15 hrs	6-10 hrs 15-20 ghes	2-3 in person 4-6 online

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Action Plan

Time Frame	Objective	Key Actions
Month 1	Connect & Introduce	Intro email/ message, resources, short call
Month 2	First Engagement/ Visit	Attend fair, in-person or virtual visit, share stories, FAQs, Info Session
Month 3	Add Value	Host webinar, send resources, share dealines/ scholarships, mock exam
Month 4-5	Stay Visible	Month update email, re-engage, via event invites or check-ins
Month 6-9	Deepen Trust, Academic Strengghts	Propose speaker session, connect with alumni, custom workshops, webinars, faculty feadture
Month 10+	Advance Engagement + Partnership	Plan fly-ins, co-branded events, school partnerships

OKRs & KPIs

Objective: Build recruitment presence and generate student leads in Ecuador.

Key Results (What success looks like this quarter)
1. Host 1 virtual event (info session or mock exam) for students.
2. Connect with 5 new partners (counselors, agents, or schools) based in Ecuador
3. Generate at least 5 completed student applications from Ecuador.

KPIs (Ongoing indicators you will track)
# of attendees from Ecuador at your virtual event
# of follow-up conversations after the event (WhatsApp replies, email opens)
# of new contacts added to your CRM (counselors, agents, students)
Conversion rate from Ecuador/ leads to completed applications

Why We Show Up*

LATAM Unlocked: Growth by Design Through Strategic Ecosystems
Built on Trust. Driven by Data

Ricardo Arikawa
Admissions & Recruitment Manager - LATAM
SP Jain School of Global Management

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