

# Brazil's Addressable Market for Applicants & Opportunities for Growth



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# AGENDA

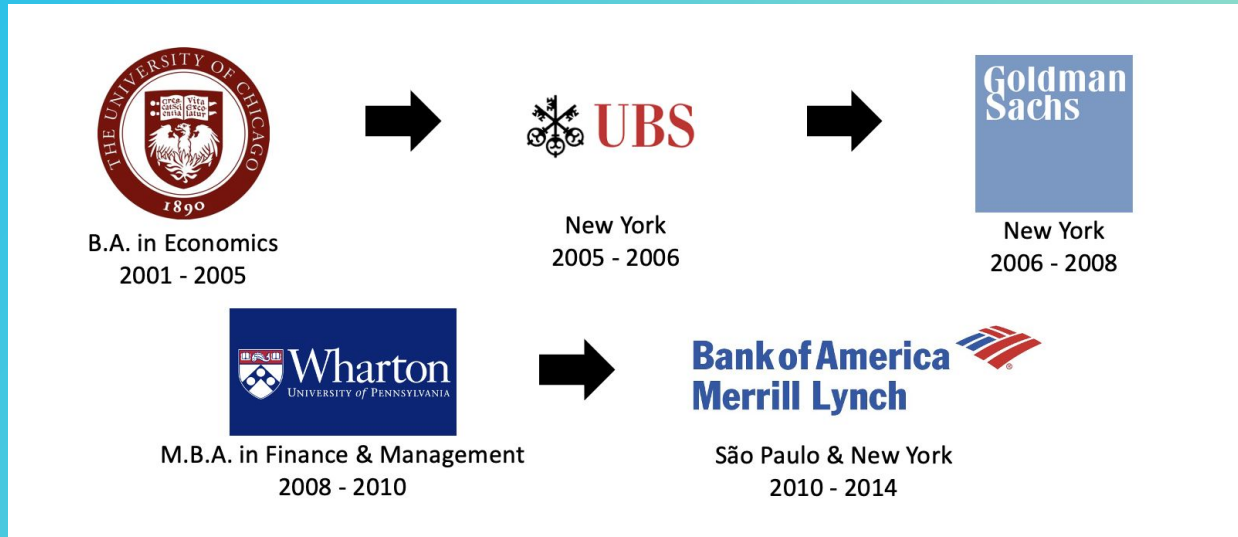
- ❑ Brief Intro
- ❑ Overview of Brazil's education landscape and growing interest in international education
- ❑ Key objectives: To highlight the size, potential, and growth opportunities in Brazil's college-bound student market
- ❑ A few ways you can tap into this potential



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# Brief Intro

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# Brief Intro

- ❑ Bandeirantes founded in 1944
- ❑ 2,700 students from 1st to 12th grade
- ❑ Graduating class: ~450 students
- ❑ 10-12% tend to apply to universities outside of Brazil
- ❑ Dedicated 3-person counseling team
- ❑ Over 1,000 1-on-1 counselor meetings every year
- ❑ 150+ annual visits from international universities
- ❑ Have workshops and SAT prep classes
- ❑ 700+ acceptances to universities outside of Brazil in the past 5 years
- ❑ Acceptances into 240+ international universities including Harvard, Princeton, Yale, Columbia, Stanford, UChicago, Duke, Penn, Brown, Dartmouth, Hopkins, UBC, UToronto, Bocconi, IE University and many more



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# Brief Intro



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# Brazil's Demographics – College-Bound Age Group

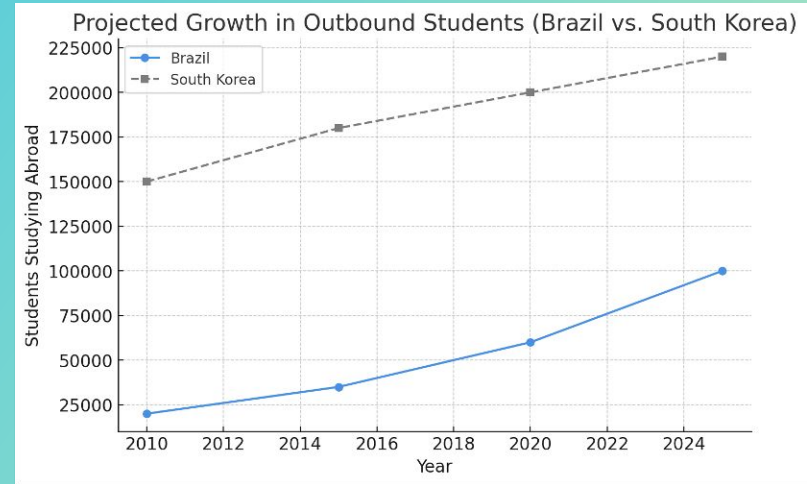
- ❑ Brazil and Mexico are the two largest markets in Latin America in terms of GDP and population, followed by Colombia
- ❑ Together, Brazil and Mexico account for ~330M people (50% of LatAm) and ~USD 4T of GDP (60% of LatAm)
  - ❑ Brazil has ~200mn people vs. Mexico's 130mn
  - ❑ Brazil's GDP is USD 2.2T vs. Mexico's USD 1.8T
  - ❑ Brazil and Mexico account for 50% of total students across Higher Education and K-12
- ❑ Brazil's Population: 214 million (2023 estimate)
  - ❑ Ages 15-24: Approx. 34 million young people in the prime college application age
- ❑ Growing middle- and upper-middle-class population with aspirations for global education
- ❑ Increased English proficiency and international curriculum adoption (IB, AP, A-Levels, etc)





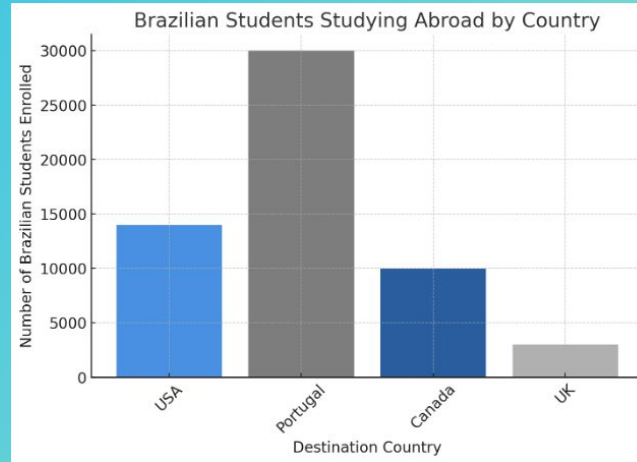
# Brazil's Demographics – A Comparison

- ❑ Brazil can be compared to South Korea in many ways:
  - ❑ Population Size: Brazil ~214M vs. Korea ~52M
  - ❑ South Korea sends ~200K+ students abroad annually vs. Brazil ~50-60K but growing fast
  - ❑ Both have strong private education sectors
  - ❑ Cultural aspirations for international degrees
- ❑ **South Korea shows what Brazil could become with more structured international pathways**



# Addressable Market for Students Applying Abroad

- ❑ Brazil has over 3.5 million students graduating from high school annually
- ❑ Rising numbers of students from top-tier private schools applying internationally
- ❑ Estimated 100,000+ Brazilian students currently enrolled in universities abroad (up from 58,000 in 2017 → up 70% in 7 years)
- ❑ 50,000-60,000 students apply abroad each year



Sources: Brazilian Ministry of Education (MEC), UNESCO, Brazilian Association of International Education (FAUBAI), EducationUSA, Fundação Estudar



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# Addressable Market for Students Applying Abroad

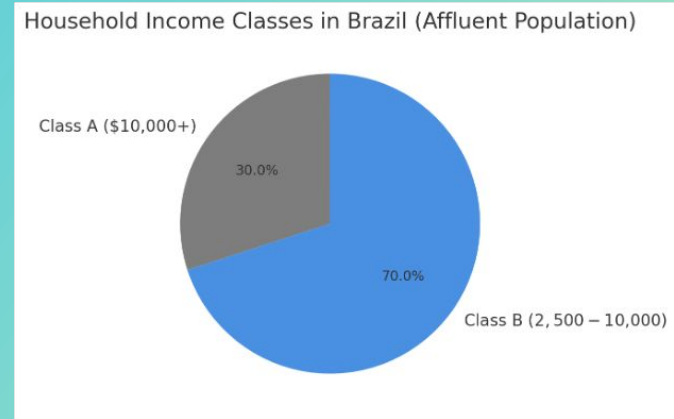
- ❑ Increasing outbound student numbers seeking quality higher education, career opportunities, and global mobility
- ❑ Strong and growing demand for global higher education, particularly in STEM, business, and liberal arts
- ❑ Families increasingly willing and able to invest in international education
- ❑ Large, growing bilingual student population well-prepared for international education
- ❑ Strong international school network fostering more globally competitive graduates
- ❑ Access to scholarships and financial aid fueling interest, including government and private-sector initiatives supporting study-abroad scholarships



# Household Income & Capacity to Pay for Colleges Abroad

- ❑ Upper-Middle-Class & Affluent Households (A & B classes):

- ❑ Class A: Avg monthly income of USD 10K+
- ❑ Class B: Monthly income of USD 2.5-10K



- ❑ Families investing in education as a priority:

- ❑ Private school tuition (international schools) averages USD 15-30K per year
- ❑ Capacity to pay for university tuition abroad (especially in the US, Canada, UK)



# What's Driving the Demand?

- ❑ International Experience: Exposure to diverse cultures and global perspectives is a significant motivator
- ❑ Enhanced Career Prospects: Degrees from internationally recognized institutions can improve employability and career advancement
- ❑ Language Acquisition: Improving proficiency in languages like English is a key factor
- ❑ Scholarship Opportunities: Availability of financial aid and scholarships makes studying abroad more accessible
- ❑ "Prestige" Factor: Cultural drive towards aspirational "brands" and networking opportunities



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# What's Suppressing Demand?

- ❑ High tuition and cost of living abroad
- ❑ Fears regarding immigration / shifting political climates
- ❑ English proficiency concerns
- ❑ Family hesitation to sending kids away
- ❑ Limited understanding of the number of possibilities (beyond the "Ivies" and optionality to transfer, etc)
- ❑ Large segment of population not taught to "dream big"



# International M&A Activity in Brazilian Education

- ❑ Inspired Education Group: Acquired multiple international schools in São Paulo, Rio de Janeiro, and Brasília
- ❑ Nord Anglia Education: Recently expanded its footprint in Latin America, targeting premium private education institutions
- ❑ Cognita Schools: Entered the Brazilian market, focusing on high-quality bilingual and international education



# Potential Strategies to Tap Further

Importance to diversify within Brazil itself:

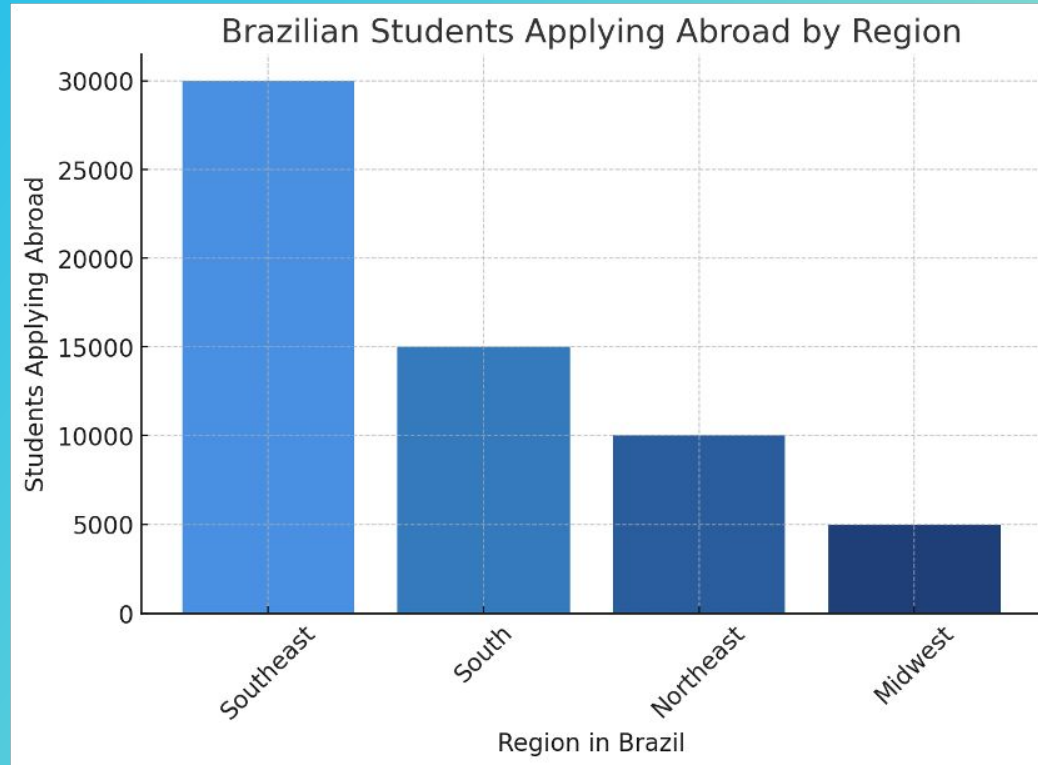
- ❑ Southeast (São Paulo, Rio de Janeiro, Minas Gerais):
  - ❑ Highest concentration of elite international and bilingual schools, with São Paulo being the economic hub with highest GDP and purchasing power
- ❑ South (Paraná, Santa Catarina, Rio Grande do Sul):
  - ❑ European-influenced education culture, high levels of English proficiency and growing interest in STEM and business degrees abroad
- ❑ Northeast (Bahia, Pernambuco, Ceará):
  - ❑ Rapidly growing private education sector with affluent families seeking international education
- ❑ Midwest (Brasília, Goiás, Mato Grosso):
  - ❑ Brasília: High GDP per capita, strong diplomatic and expatriate communities
  - ❑ Agribusiness driving income growth
  - ❑ Demand for international programs growing in secondary cities



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# Potential Strategies to Tap Further



Sources: UNESCO, Brazilian Association of International Education (FAUBAI), Fundação Estudar



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# Potential Strategies to Tap Further

- ❑ Tailored Marketing: Develop campaigns that resonate with Brazilian cultural values and educational aspirations
- ❑ Language Support: Offer preparatory language courses to assist with language proficiency requirements
- ❑ Scholarship Programs: Highlight available scholarships and/or financial aid options to alleviate cost concerns
  - ❑ More financial aid and/or merit-based scholarships directed at the region to attract extraordinary talent
- ❑ Alumni Success Stories: Share testimonials from Brazilian graduates who have excelled after studying abroad → BRASA help?



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# Potential Strategies to Tap Further

- ❑ Potential for partnerships, dual-degree programs, and pathway programs with Brazilian higher education institutions
- ❑ Include Brazil in recruitment trips (maybe longer trips or even 2x per year?)
- ❑ Map out the key players in terms of Brazilian schools that have large cohorts of applicants
- ❑ Reach out if you need help!

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