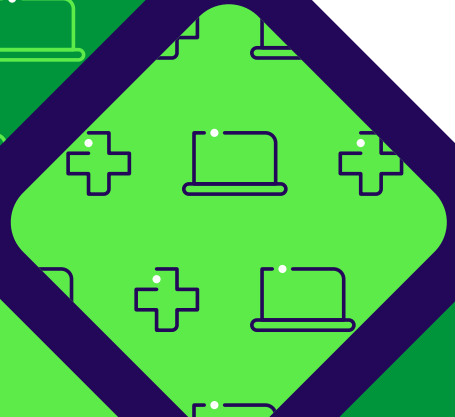


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# Benchmarking the UK as a study destination

British Council



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A special commendation is reserved for the dedicated team who developed the research. We extend our deepest thanks for the collaborative spirit and cooperation demonstrated by all involved parties. This publication stands as a testament to the collective efforts that have culminated in a comprehensive and insightful exploration of the international education landscape in the Americas region.



**Joanna Burke**  
Regional Director

# Introduction / Foreword

This research delves into the landscape of international education from two distinct perspectives: that of the student or alumnus and that of the educational agent. It offers a mapping of key stakeholders and networks in the Americas connected to both audiences, providing information and analysis on international education in Brazil, Colombia, Mexico, and Peru.

This report not only supplies benchmarks but also provides resources to better understand the diverse local contexts and respond effectively to market needs. The first part of the publication maps agents and agent networks across the four countries, offering an overview of the services and programs they provide along with details of their current partnerships in the UK, with a particular focus on higher education.

The second part presents the socio-economic profile of students and alumni interviewed by the research team. It covers their academic background, current and future areas of interest, preferred study programme formats, and communication channels. Additionally, it includes their views on the UK as a study destination.

Finally, the third part examines the primary funding mechanisms for student mobility from Brazil, Colombia, Mexico, and Peru. This includes national government scholarships and loans, as well as various private funding sources. It outlines the engagement of UK universities and governmental entities with key stakeholders in these countries.

The overall outcome of this study is an updated landscape for the involved countries and their links with the UK, highlighting potential opportunities, under-explored areas, and barriers that need addressing. Importantly, it emphasises the significance of local and international actors working strategically for more inclusive, supportive, and successful international education experiences in the UK.

This report purports to benchmark the United Kingdom as a study destination for Latin American students, and analyses student recruitment trends to Australia, Canada and the United States, three of the most popular anglophone destinations for students from Brazil, Colombia, Mexico and Peru.

An analysis was conducted to review what may drive students to choose these destinations by examining what each country is doing in-market, including a review of their social media activity.

An exclusive survey was conducted in January 2023 with forty-five education agents in Latin America to assess their perceptions of main client motivators when choosing an international study destination, to discover the proportion of their higher education clients that are self-funded or supported by education loans or scholarships, and to investigate what supports may help them to increase applications to UK universities.

A further exclusive study aimed to assess students' needs, desires, attitudes and concerns related to international higher education, and 921 people from upper social classes in Brazil, Colombia, Mexico and Peru shared their opinions.

# Benchmarking the UK as a study destination

**British Council**

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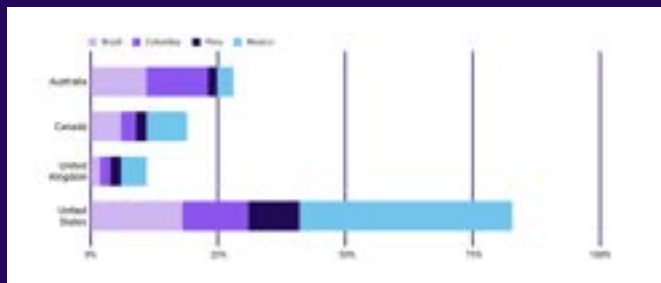
# Executive Summary

Agents across Brazil, Colombia, Mexico, and Peru overwhelmingly reported that clients do not automatically think of the UK when considering overseas third level studies, and several reflected that the UK was better placed in the market historically. Agents consider the price of courses and cost of living in the UK to be prohibitive. They want more training and support to promote the UK as a study destination. But, student opinions did not necessarily point to affordability as a primary concern, and there was an overall positive image of the UK and the weight of a British qualification, alongside a desire to know more about student life in the UK and to understand how qualifications relate to the workplace.

Markers of success among competitor destinations include the launch of a 'Study Australia Experience' platform through national media campaigns across Latin America in 2022, delivering content in Portuguese and Spanish. The platform carries limited information on individual universities in Australia and obliges students to register contact details for further information, thus bringing them into the pipeline. EducationUSA is hugely active in the region and enjoys representation across several cities in each source market and close alignment with both universities and scholarship institutions.

Community colleges are popular third level alternatives in the United States and Canada along with VET programmes in Australia. Both Canada and Australia offer healthy post-study options with the potential for longer-term immigration.

Many recommendations in this report overlap between all four countries, such as the need to develop strong agent and private school networks, while noting that many undergraduate recruits from Latin America are in their twenties and working. #StudyUK brand building is recommended in each market and should be accompanied by strategic communications campaigns to include content in Spanish and Portuguese on country-specific social media pages. Most content already available on #StudyUK global pages would work well in the region, if translated. A launch of the Study UK platform in Spanish and Portuguese is considered pertinent, along with platform launch events in key cities that would combine B2B activity with agent and school counsellors, as well as student recruitment events with key alumni ambassadors. A strong regional demand for online courses was identified along with specific skills shortages in each market, and engagement with government ministries and industry associations is recommended across the region.



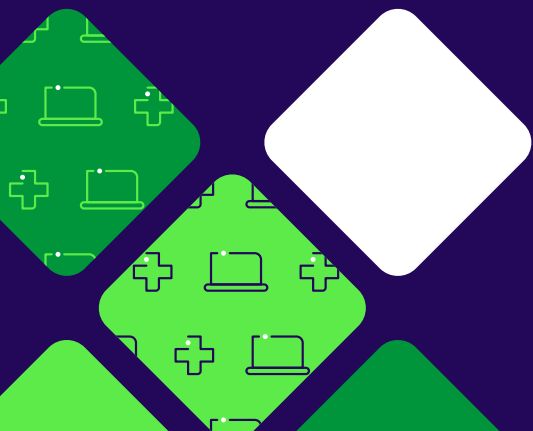
UNESCO data on internationally mobile third level students is used throughout this report in order measure market share and compare the performance of destinations. However, this UNESCO data shows discrepancies from official destination data at times.

Likewise, EF English Proficiency Index is utilised as it is the largest global dataset of its kind. It is acknowledged that this index does not give a fully accurate reflection of fluency rates, and other measures are used as available.

Market share of internationally mobile third level students (2020) from Brazil, Colombia, Peru, Mexico in Australia, Canada, United Kingdom, United States. Source: [UNESCO](#)

# Brazil

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# Brazil

Population	215 million
GDP 2022	USD \$1.8 trillion
Unemployment	8.7% (Q3 2022)

## Main recommendations:

- High level engagement with the Ministry of Education to review mutual recognition of qualifications, potential for VET offer from the UK, and other possible initiatives.
- Engagement with industrial associations to evaluate acute skills needs that may be addressed with an offer of short online programmes.
- Development of #StudyUK brand with key messaging on social media in Portuguese.
- Launch Portuguese version of Study UK platform with national media campaign and in-person events in key cities.

## Market Overview

The largest and most populous territory in Latin America, Brazil was the twelfth largest global economy in nominal GDP terms in 2021 ([World Bank](#)), and the economy recovered better than expected post-pandemic (Brazil reported the second-highest reported death toll globally). The economy grew by **2.9%** in 2022, driven by consumer spending alongside declining government consumption and exports. Notably, every major industry posted positive economic growth during 2022, while ongoing global price hikes in commodities such as fuel, food, and minerals boosted exports (exports advanced by nearly 12% in 2022). Economic recovery may stall if commodity prices fall globally.

A leading breadbasket country, Brazil has a large service sector (GDP in 2021 comprised 59.38% services, 18.86% industry and 6.89% agriculture). While the recent administration kept inflation down through cutting import tariffs and subsidising fuel, government debt hit **80%** of GDP and inflation was at around 9% at the end of 2022. The Brazilian Real, one of the [top performing currencies](#) in 2022, may reflect pessimistic outlooks for 2023 on national and global scales.

## > Political Scenario

On 1 January 2023, Luiz Inácio Lula da Silva ('Lula'), became the first to serve a third presidency in Brazil's young democracy. His earlier reign from 2003-2010 was a period marked by economic growth and social reforms that lifted millions of Brazilians out of [poverty](#), although his legacy was overshadowed by corruption [scandals](#). Having beaten incumbent Bolsonaro by the thinnest margin in modern Brazilian electoral history (50.9% to 49.1%), leftist Lula is expected to govern as a socially progressive centrist, with centre right vice president, and former governor of São Paulo, Geraldo Alckmin. A Congress [dominated](#) by Bolsonaro allies and dented public coffers will challenge the new administration.

Economic forecasts are [mixed](#), although there is optimism that Lula's international popularity may attract foreign investment in sustainable ESG friendly industries, and strengthen Mercosur towards new trade deals. However, doubts remain over his ability to balance the price tag of social inclusion programmes promised on the campaign trail with market demands for cuts to government expenditure, which increased [significantly](#) during Bolsonaro's tenure.

## > Unemployment

Unemployment was at 8.7% in [Q3 2022](#), the lowest recorded since Q2 2015. The total number of people in employment (99.3 million) grew by 1% (1 million more people employed) in Q3 2022 and 6.8% (6.3 million more people employed) in the year. The number employed with a formal contract grew 1.3% in relation to the previous quarter, reaching 36.3 million people (8.2% growth year-on-year).

However, the number of Brazilians employed informally in the private sector (13.2 million people) was the highest since 2012. As of Q3 2022, the current informality rate is 39.4% of the employed population (more than 39 million informal workers), down from [46%](#) in 2011.

The average household monthly real earnings grew for the first time since June 2020, both in quarterly (3.7%) and in annual comparisons (2.5%), reaching R\$2,737, according to the [PNAD](#) (Continuous National Household Sample Survey) released by national statistics agency IBGE.

## > Skills Shortages

Brazil currently faces an acute skills shortage, and 81% of employers cannot find talent with the right blend of technical and soft skills, according to [ManpowerGroup's 2022 Talent Shortage Survey](#) (the highest percentage recorded since data collection began in 2012). While talent shortages cross all industries, they are most acute in banking & finance (86%), IT & technology and manufacturing (84% respectively), and education, health and government (80% respectively).

The IT sector also struggles to staff adequately, and ABES, the Brazilian Association of Software Companies, reported that 78% of respondents to a [2022 survey](#) were outsourcing to deal with the skill gap. Nearly four out of ten companies struggled to fill vacant IT positions. Meanwhile, a [Korn Ferry](#) study suggests that Brazil will be one of the hardest hit countries by current and future skills shortages, with an estimated shortage of up to 18 million skilled workers by 2030. IT skills deficits are costly, and it is [estimated](#) that personnel shortages in the sector accounted for accumulated losses of

some BRL \$167 billion from 2010 - 2020. IT skills shortages span sectors like agriculture, the food industry, and smart grid, and more than 408,000 jobs were considered unfilled by the end of 2022.

Banking & Finance	86%
IT & Technology	84%
Manufacturing	84%
Education, Health & Government	80%
Wholesale & Retail	79%
Construction	76%
Restaurants & Hotels	66%

Top 5 in-demand roles and top 5 in-demand soft skills in Brazil 2022. Source: [ManpowerGroup](#)

Top 5 in-demand roles		Top 5 soft skills	
1	Information Technology	1	Reasoning & Problem-Solving
2	Customer Facing & Front Office	2	Resilience & Adaptability
3	Operations & Logistics	3	Initiative Taking Skills
4	Sales & Marketing	4	Reliability & Self-Discipline
5	Administration & Office Support	5	Collaboration & Teamwork

Top 5 in-demand roles and top 5 in-demand soft skills in Brazil 2022. Source: [ManpowerGroup](#)

## > Education

	Escolaridad / Nivel	Grados	Edad	Años
Primaria	Primaria (Ensino Fundamental I, II)	1-9	6-14	9
Secundaria	Secundaria / Bachillerato (Ensino Médio)	10-12	15-18	3
Terciaria	Licenciatura (Bachelerado / Licenciado)	-	-	4-6
	Especialización en posgrado (Especialização)	-	-	1
	Maestría (Mestrado)	-	-	1-2
	Doctorado (Doutorado)			2

Sistema educativo brasileño. Fuente: [Scholaro.com](#)

Basic schooling is divided into three levels in Brazil (ensino fundamental I; ensino fundamental II; ensino médio). The three-year ensino médio cycle has recently undergone a significant overhaul and curricular change, which many Brazilian educators are still trying to decipher. A high school diploma is a prerequisite for entrance to the third level education system,

along with competitive vestibular entrance exams or ENEM (National High School Exam).

Brazil has seen a steady uptick in its upper secondary rates of educational attainment among 25-34 year-olds since 2010, along with a sharp rise in rates of tertiary attainment, according to the [OCDE](#) (Organisation for

Economic Co-operation and Development, 2021). While rates remain below the OECD average, growth in upper secondary attainment between 2009 and 2019 exceeded the global average. A range of improvements in the Brazilian education sphere were noted. Increased educational participation was boosted by Bolsa Familia, a cash transfer system for low-income families with school attendance a prerequisite for payment, while a socioeconomic and racial quota system opened public university places to students that historically did not have access.

Eight of ten (83%) children in Brazil's school system were enrolled in public institutions in 2021 (35.3 million students), the highest proportion since 2012. However, the impact of the pandemic on public schooling presents a concerning scenario. The Brazilian Institute of Geography and Statistics (IBGE) says the extended period that schools remained closed during the pandemic (one of the longest in the world, according to UNESCO) had the sharpest impact on public school students, with many excluded from online classes due to lack of access to internet and/or hardware.

Drop-out rates due to the pandemic grew more acutely in the public university sector, as private universities managed to move to remote teaching with little disruption. Nearly four million Brazilians left higher education in 2020. Completion rates are particularly low in various IT areas, with dropout rates above 70% in courses like internet systems, computer science, and computer engineering, while more than half do not complete courses in administration, law and nursing. Almost 80% of Brazil's third level students attend private universities, and 62% of them work while studying, as compared to 40% that work while attending public universities. Women are in the majority (71%) at undergraduate level. Pedagogy is the most popular undergraduate area of study in Brazil, with three quarters studying online. Law and business are the next most popular courses at undergraduate level.

A [study](#) of the average age of undergraduate students in 2015 suggests that many do not proceed to higher education directly after high school. The average age of pedagogy students was 31 years, history students had a mean age of 30 years, and maths students were on average aged 28 years. International relations and science & technology students were the youngest cohort, with an average of 22 years.

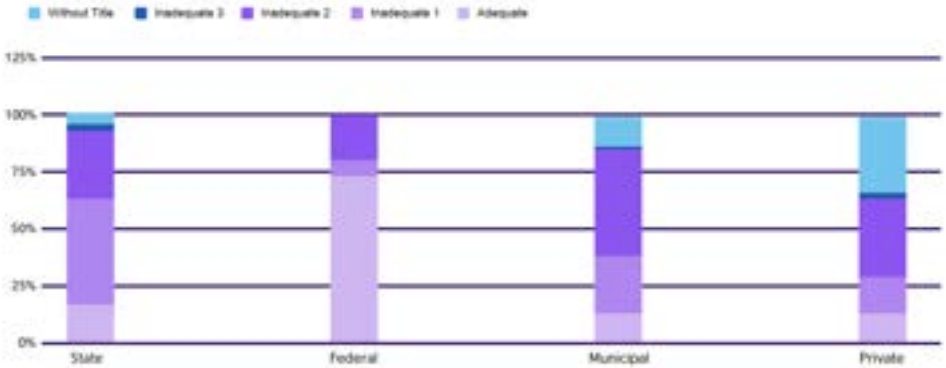
Brazil's private third level offer mushroomed considerably in the past decades, and online learning is a huge growth area, with demand for distance learning growing by [428%](#) in the decade from 2010.

Brazil's education portfolio suffered continual budget cuts during the Bolsonaro administration, in the context of education spending that was already on a [downward trend](#) following a 2014 peak. Discretionary spending for education dropped by 36% in 2019 (from BRL \$66.11 billion in 2018 to BRL \$42.43 billion the following year).

## > English Proficiency

Demand for English proficiency in professional positions is increasing, and the number of Brazilians pursuing English courses abroad has doubled [since 2015](#). English is taught in most schools in Brazil, but the teaching quality and output is very low. In a 2014 British Council [study](#) only 5% of Brazilians reported some

knowledge of the language, with half (47%) saying their knowledge was basic. Observatório da Língua Inglesa (English Language Observatory) data shows that more than 70% of English teachers in Brazil’s basic education system were not adequately qualified ([2020](#)).



Adequacy of English teachers qualifications in Brazilian basic education 2020 (sample of more than 64,000 teachers across different school types). Source: [Observatório da Língua Inglesa](#)

Brazil ranked 58 out of the 111 countries in the [EF English Proficiency Index 2022](#), progressing to ‘Moderate’ proficiency for the first time. Despite this significant improvement, Brazil still ranks behind less-developed Latin American neighbours, including El Salvador, Honduras, and Bolivia. Brazilians aged 18-20 and over-41 are considered to have ‘Low’ proficiency according to EF, while those aged 21-40 have ‘Moderate’ proficiency. The EF index identified certain Brazilian cities with higher fluency, all above the global average of 502 points.

It is worth noting, however, that more than 32,000 Brazilian students currently study in English speaking destinations, suggesting that there is a significant pool of Brazilian students that are bilingual. More than 365,000 Brazilians were internationally mobile on language programmes in [2018](#). However, figures also include mobility related to other languages.

City	EF Proficiency Score	EF Proficiency Level
Curitiba	567	ALTO
Florianópolis	562	
Porto Alegre	559	
Campinas	551	
Belo Horizonte	549	MODERADO
Uberlândia	540	
Londrina	538	
Brasília	537	
Rio de Janeiro	536	
Aracaju	532	
São Paulo	532	
Recife	526	
Vitória	525	
Goiânia	524	
Natal	523	
Fortaleza	522	
Salvador	513	
João Pessoa	510	
Campina Grande	508	

Brazilian cities identified as having 'Moderate' English proficiency. Source: [EF Regional Fact Sheet 2022](#)

## > Internet Penetration

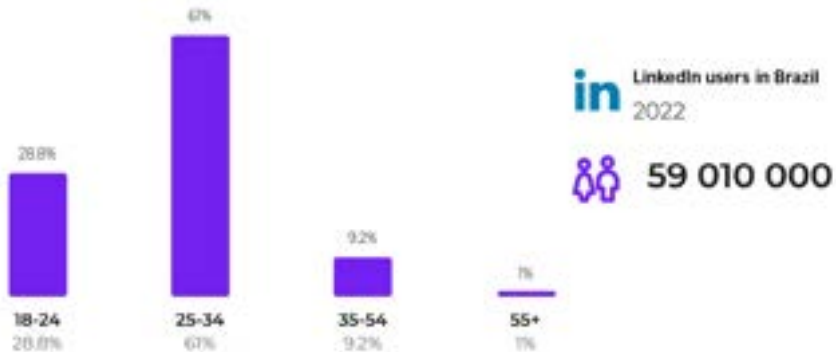
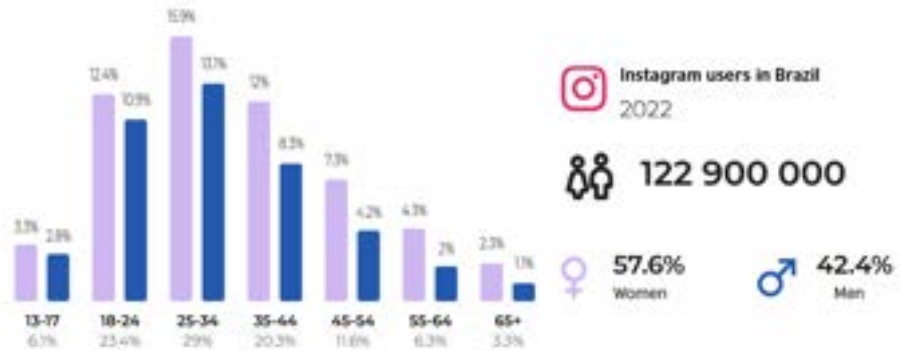
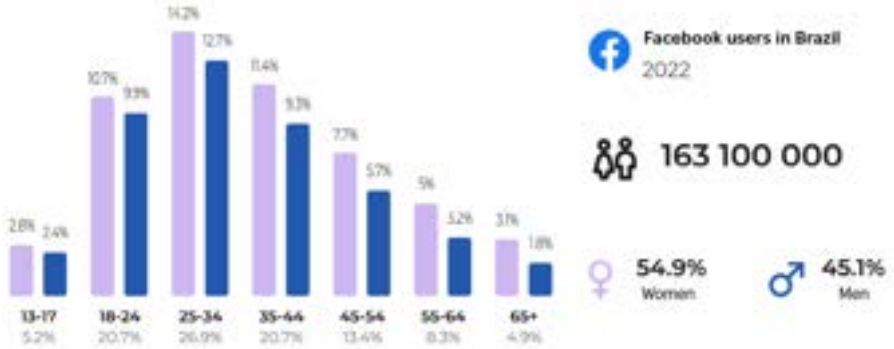
Brazilian internet penetration is impressive in the regional context, and the World Bank estimated that **81%** of Brazilians were online in 2020, compared to **74%** across Latin America and the Caribbean. The [Brazilian Internet Steering Committee](#) noted a 9% increase in domestic internet connections during the pandemic, summing 59.4 million connections.

Brazil's Ministry of Communications created '[Wi-Fi Brazil](#)' in April 2021 to deliver high-speed free internet to Brazil's underdeveloped regions, followed by a law to create 'Internet Program Brasil', an initiative to deliver 700,000 20GB chips to children from low-income

backgrounds. More than 21 thousand (21,608) free high speed connections have been installed, with 70% in rural locations, and more than **15 thousand** in schools. Considering that Brazil has more than 178 thousand schools, the initiative has a way to go (only 8% of schools have benefitted to date). 'Wi-Fi Brazil' was criticised for 'obligating' beneficiaries to watch a 30-second promotional government video to access the internet.

## > Social Media Use

More than 165 million Brazilians use social media, according to [Statista](#), with an estimated growth of 14% predicted by 2027. While messaging service WhatsApp remains the primary source of digital communication for [96%](#) of Brazilians, Facebook is the champ when it comes to social networks. The most active age cohort across Facebook, Instagram and LinkedIn is 25-34 years, respectively.



Number of Brazilian users of social networks in December 2022. Source: [NapoleanCat.com](#)

# Student Mobility

Brazil is one of the major global countries of origin for international study. According to [UNESCO's](#) Global Flow of Tertiary-Level Students, there were more than 89 thousand Brazilians studying overseas in 2020, with 92% heading to the country's top ten destinations

(37% of those to English speaking destinations). UNESCO places the United Kingdom as the 9th most popular destination, receiving 2% of Brazil's internationally mobile higher education students.



Global Flow of Tertiary-Level Students from Brazil. Source: [UNESCO](#)

Destination Country	Number of Mobile Third Level Students	Percentage of all Mobile Third Level Students
Argentina	20,515	23%
Portugal	18,081	20%
United States	16,086	18%
Australia	9,538	11%
Canada	5,151	6%
Germany	4,868	5%
France	3,432	4%
Spain	2,068	2%
United Kingdom	1,627	2%
Italy	887	1%
<b>Sum of Top 10</b>	<b>82,253</b>	<b>92%</b>
<b>English Speaking in Top 10</b>	<b>32,402</b>	<b>37%</b>
<b>Overall Total</b>	<b>89,151</b>	<b>100%</b>

Top ten countries receiving third level students from Brazil. Source: [UNESCO](#)



# Looking to the Competition

## > United States

The United States is the most popular English speaking destination for Brazilian university students, according to [UNESCO](#) figures, and Brazil is the 8th biggest source market. US Department of Trade counted [14 thousand](#) Brazilians in US universities during the 2020- 21 academic year (figures vary somewhat from UNESCO numbers), worth USD \$758 million to the local economy (52% at

undergraduate level; 30% postgraduate students; 4% studied language programmes; while 15% pursued OPT (Optional Practical Training)). Around [80%](#) of internationally mobile students come from the south and south-east of Brazil. The top three locations for US recruitment are Rio de Janeiro, and Brasilia, and São Paulo, with the largest proportion of applicants (36%).

Year	Number of Brazilian students	Year- on-year change
2015	23,675	-
2016	19,370	-18%
2017	13,089	-32%
2018	14,620	12%
2019	16,059	10%
2020	16,671	4%
2021	14,000	-16%

Brazilian students in the US 2015 - 2021, and percentage change Year-on-year. Source: [US Department of Trade](#)

US Institution Type	%
Associates Colleges (Two Years)	17%
Baccalaureate Colleges (Four Years)	5%
Masters Colleges & Universities	12%
Doctorate Granting Universities	64%
Special Focus Institutions	3%
Public Institutions	61%
Private Institutions	39%

Brazilian students in the US by US institution type. Source: [US Department of Trade](#)

## Top 5 Influencers

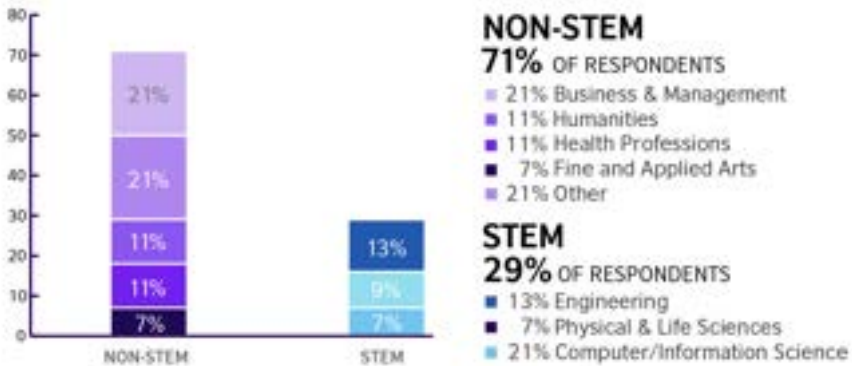
Most Important Factors When Selecting a University in the U.S.



Top 5 influencers for Brazilian students when choosing a university in the United States. Source: [Intead 2019](#)

Academic level	Number of Brazilian students	% of Brazilian students	% change (2020 to 2021)
Undergraduate	7,273	52%	-13%
Graduate	4,159	30%	-14%
Non-Degree	519	4%	-62%
OPT	2,049	15%	-3%
Total	14,000	100%	-

Brazilian students in the US by academic level, and percentage change Year-on-year. Source: **US Department of Trade**



Programme interests among Brazilian students. Source: [Intead 2019](#)

The US has a natural attractiveness to Brazilian students with North American culture pervading TV, cinema and music scenes in Brazil. Universities and colleges from the US have been active in Brazil for many years, and a recent growth in US high schools providing dual high school diplomas (delivered online, in partnership with Brazilian schools) is understood to have driven further growth in demand for undergraduate studies in the US. Community colleges are particularly popular due to a lower price point and the potential to later transfer to a US university.

[Pontes Americanas](#) (American Bridges) is an EducationUSA programme offered to a network of 655 Federal Institutes throughout Brazil, offering English classes and regular information on study opportunities. The initiative gives EducationUSA access to more than one million students, along with their 44 advice centres around Brazil (the largest EducationUSA network in the world). The US Embassy runs an Essay Writing Resource Centre that offers online tutorials to more than 8,500 young Brazilians.

Red social	Número de seguidores	Interacción promedio
<b>EducationUSA Brasil</b>		
<a href="#">Instagram</a>	19,300	208
<a href="#">Facebook</a>	89,427	2
<a href="#">LinkedIn</a>	1,172	6
<b>EducationUSA São Paulo</b>		
<a href="#">LinkedIn</a>	542	4%

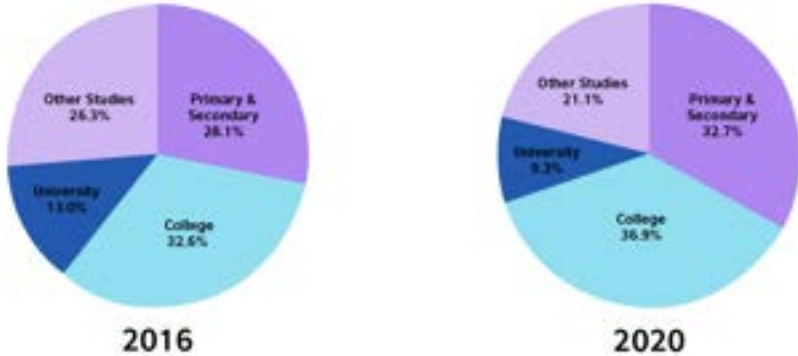
Presencia de EducationUSA en redes sociales en Brasil, con número de seguidores e involucramiento promedio del público por diez publicaciones.

Despite having many more followers on Facebook, EducationUSA gets better traction on Instagram with posts that detail practical advice like “tips to choose the college of your dreams”, as well as details of short courses and recruitment fairs. EducationUSA Brasil had an average of 208 engagements (likes, reposts, comments) for their last ten posts on Instagram, compared to an average of 2 on Facebook, and 6 on LinkedIn.

## > Canada

Brazil was the fifth largest source market of international students for Canada in [2019](#) and the destination recovered quickly post-pandemic. Post-study work options and the possibility of permanent residence in the North American country are seen as prime reasons for which Brazilians opt for Canada. Short visa processing times are another benefit for students eager to leave Brazil and begin on their international path. Canadian colleges are particularly popular among Brazilian students, offering shorter and cheaper courses than the traditional university programmes, and dozens of colleges have full time representatives in Brazil.

The main governmental [messaging](#) around Canada as a study destination is (i) high quality of life; (ii) a safe and inclusive society; and (iii) exceptional educational opportunities. Regular media coverage regarding permanent residence options in Canada help to keep the dream alive, and many agencies deal exclusively with this destination, offering a wraparound service that includes immigration counselling and support as well as study options.



Canadian study permits awarded to Brazilians by study level 2016 - 2020. Source: [ApplyInsights](#)

Year	Number of Brazilian students	Year-on-year change
2015	6,350	-
2016	7,295	15%
2017	8,865	22%
2018	10,245	16%
2019	10,230	0%
2020	6,040	-41%
2021	8,545	42%
2022	10,405	22%

Brazilian study permit holders in Canada 2015 - 2022. Source: [IRCC](#)

Social Network	Number of followers	Engagement
<b>EduCanada (Global)</b>		
Instagram	3,727	47
Facebook	72,000	30
LinkedIn	3,693	6

Social networks used by EduCanada; number of global followers; average level of engagement on ten posts.

EduCanada uses its global pages to promote the Canadian offer, and does not have a Brazil-specific social media presence. Despite having many more followers on Facebook, more engagement can be witnessed on Instagram. Social media messaging focuses on scholarship offers, profile posts on individual colleges (including details of their support services), and graduate employability.

## > Australia

Brazil has the sixth largest cohort of international students in Australia, up from 8th in 2021 (it was the fourth biggest market in 2018). Rigid border closures and lockdowns during the global pandemic had a significant impact on Australia’s student numbers from Brazil, and this loss has yet to be recovered.

Austrade (Australia Trade and Investment Commission) is responsible for promotional work to international students, with efforts complimented by the Australian diplomatic network and individual universities and colleges with in-market representatives. Austrade launched ‘[Study Australia Experience](#)’ in January 2022, with content available in Spanish and Portuguese for Latin American markets in a bid to recover lost trade related to the pandemic.

Austrade engaged a communications agency locally, and [boasts](#) that their targeted advertising reached 20 million prospective students in the region in the first six months; bringing 310,000 thousand visitors, and 37,000 registered users to the platform in the first six months. Dozens of live events were held in the region to promote Australia and its education institutions with alumni ambassadors, university representatives and education agents, and a three hour virtual fair was held in June 2022 for 1,700 prospective students. In December 2022, a webinar entitled ‘Understand recent initiatives from the Australian government to help students’ was promoted to a Brazilian audience. Phase two of the Austrade strategy will include longer events with more space for institutions along with increased and refined social media and digital marketing activity.

Year	Number of Brazilian students	Year-on-year change
2015	17,260	-
2016	19,522	13%
2017	24,227	24%
2018	26,606	10%
2019	27,339	3%
2020	21,493	-21%
2021	14,646	-32%
2022	17,470	19%

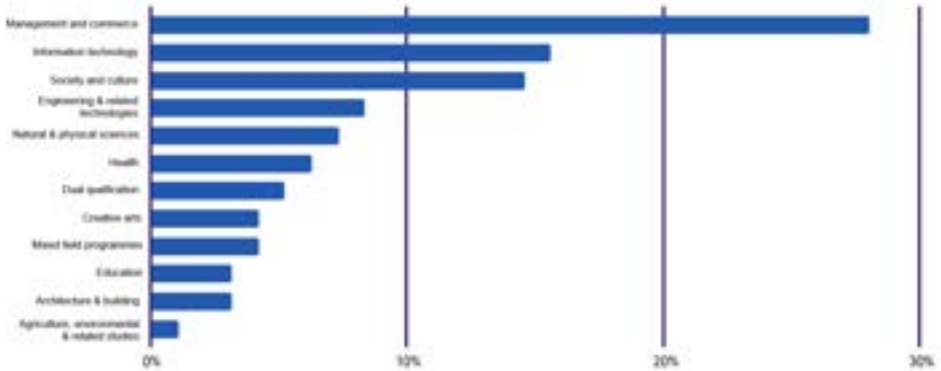
Brazilian students with student visas in Australia 2015 - 2022, and Year-on-year change. Source: [Australian Government Department of Education](#)

Provider	Student numbers	Percentage
VET	12,717	58%
ELICOS	7,301	33%
Higher education	1,884	9%
Schools	51	0.2%
Non-award	44	0.2%

Enrolment numbers in Australia from Brazil January - October 2022. Source: [Australian Department of Education](#)

Higher education students made up 9% of Brazilian student enrolments in Australia from January - October 2022, according to Department of Education [figures](#); while the lion's share (58%) are pursuing vocation (VET) programmes; and one third (33%) are on language programmes (ELICOS).

Two-thirds (54%) of Brazilian higher education students in Australia are pursuing postgraduate courses, while business and finance related courses are the clear favourite (26% of enrolments); followed by information technology (15%).



Brazilian higher education enrolments in Australia by field of education, January - October 2022. [Australian Department of Education](#)

It would appear that the only social networks used by Study Australia Experience for Brazil are Instagram and Telegram, and while engagement levels cannot be reviewed on the latter, the most recent ten posts have an average of 453 views. Austrade maintains a global presence on Facebook and Instagram 'Study Australia' profiles.

Austrade are engaged with Adventus in Brazil, and will present a webinar for Brazilian agents in March 2023.

Social Network	Number of followers	Engagement
<b>Study Australia Experience - Brasil</b>		
<a href="#">Instagram</a>	4,339	81
<a href="#">Telegram</a>	587	-
<b>Study Australia (Global)</b>		
<a href="#">Instagram</a>	37,200	-
<a href="#">Facebook</a>	366,000	-

Social networks used by Study Australia Experience; number of followers; average level of engagement on ten posts.

## > United Kingdom

The United Kingdom is the ninth destination of preference for Brazilian students, according to [UNESCO](#) figures. It is clear to see from the data in the table below that the UK has been losing market share year-on-year. While some drop-off would be expected as the Federal Science without Borders programme came to and end, similar trends were not seen in other markets (US, Canada, Australia).

Three out of five (60%) Brazilian students in UK universities during the 2020/21 academic year were pursuing postgraduate qualifications, while 39% were completing undergraduate programmes. London was the top city in the UK for students, and 45% of all higher education students from Brazil studied in London, dwarfing other British regions.

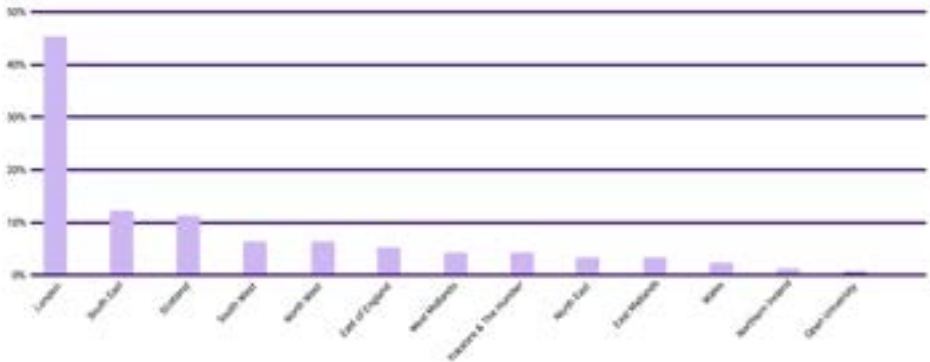
Year	Number of Brazilian students	Year-on-year change
2015	2,805	-
2016	2,190	-22%
2017	1,810	-17%
2018	1,750	-3%
2019	1,600	-9%
2020	1,645	3%
2021	1,465	-11%
2022	1,450	-1%

Brazilian higher education students in the United Kingdom 2015 - 2021. Source: [HESA](#)

A [bilateral technical commission](#) was created in 2016 between stakeholders in Brazil and in the United Kingdom to discuss the possibility of mutual recognition of postgraduate qualifications between the two nations, and a protocol of intentions was signed. This is an unusual step in the Brazilian context where graduates with international qualifications generally need to identify a Brazilian university that offers an identical course in order for recognition to be awarded, a cumbersome process. It is not clear that any further movement has occurred in this space since 2016, despite initial estimations that mutual recognition would commence in 2017. There is no mention of such an agreement on the site of [ENIC](#), the UK National Information Center for the recognition and evaluation of international qualifications and skills.

Postgraduate (research)	21%
Postgraduate (taught)	39%
First degree	37%
Other undergraduate	2%

Level of study: Brazilian higher education students in the UK 2020/21. Source: [HESA](#)



UK region where Brazilian higher education students are studying 2020/21. Source: [HESA](#)

Content on the British Council's social media is predominantly focused on IELTS and other English language material. Engagement on Instagram is relatively good, while largely nonexistent on Facebook and Twitter (based on average of the last ten posts).

Social Network	Number of followers	Engagement
<b>British Council Brasil</b>		
<a href="#">Facebook</a>	77,293	5
<a href="#">Instagram</a>	24,100	177
<a href="#">Twitter</a>	5,259	1
<b>British Council (Global)</b>		
<a href="#">Facebook</a>	2,400,000	-
<a href="#">Instagram</a>	182,000	-
<b>StudyUK_britishcouncil (Global)</b>		
<a href="#">Instagram</a>	92,000	-
<b>Study UK - British Council</b>		
<a href="#">Facebook</a>	628,880	-

Social networks used by British Council Brasil; number of followers; average level of engagement on ten posts.



## Exclusive Survey

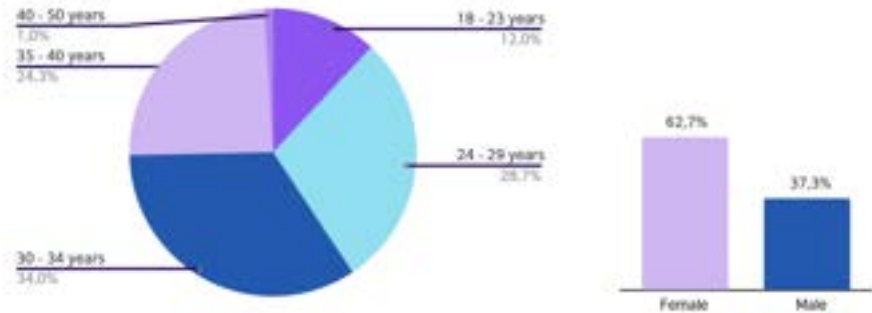
# Student Snapshot Brazil

An exclusive survey was completed by 300 Brazilians in January 2023 on behalf of the British Council. Survey respondents were aged from 18 - 50 years, with 12% aged 18 - 23 years; 29% from 24 - 29 years; 34% aged 30 - 34 years; 24% were aged 35 - 40 years; and 3 respondents (1%) were over 40.

Rather than selecting the precise location in Brazil for survey respondents, the family income of the respondents was selected to include those with earnings of at least BRL \$8,000 per month (around GBP \$1,250), placing them in social class A and B (there are around 30 million Brazilians in class A & B combined, comprising more than 14% of the

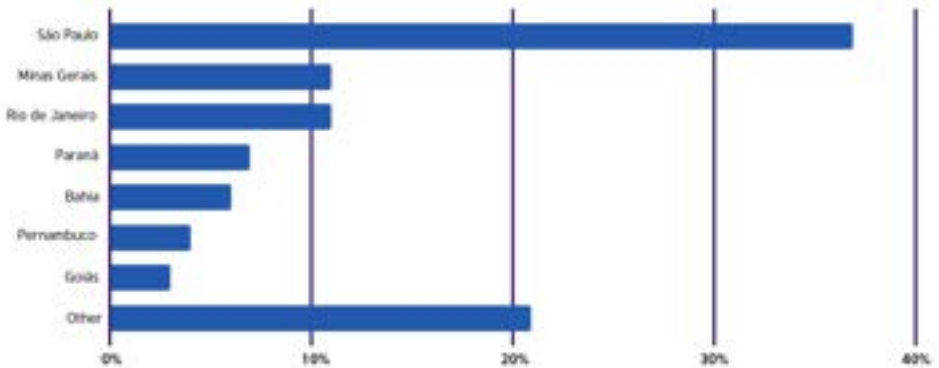
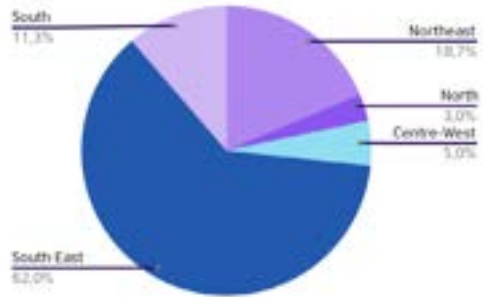
population). Responses were received from 22 states around Brazil, with a clear majority (62%) located in the south-east of the country - 19% were located in the city of São Paulo; 7% in the city of Rio de Janeiro; and another 6% were in Belo Horizonte.

Three-quarters answered the survey on a mobile phone or other handheld device, while the remainder responded on desktop computers, and 63% of the sample were female. This was a paid target audience survey applied using the Survey Monkey platform and it was not possible to collect contact details for students.



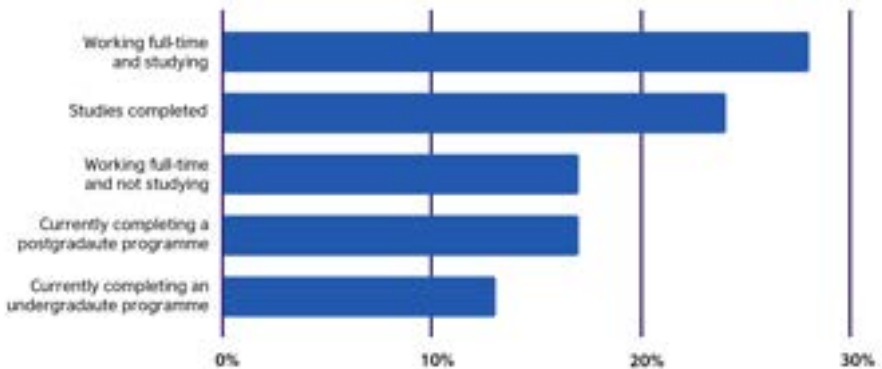
Age profile and gender of respondents to Brazil survey. Source: British Council Brazil Survey by SOS Education Consultancy 2023 2023

Most students (84%) want to receive information about study abroad by email; 63% would be keen to receive this information by WhatsApp; while 58% are happy to receive this information on social media. Meanwhile, 16% said they would like to receive information by post, and 15% said webinars were a good way to disseminate information to them. Only 13% said that events in their city were a 62.0% preferred way of attaining information regarding study abroad options.



Region and state of respondents to Brazil survey. Source: British Council Brazil Survey by SOS Education Consultancy 2023

### > Current study status

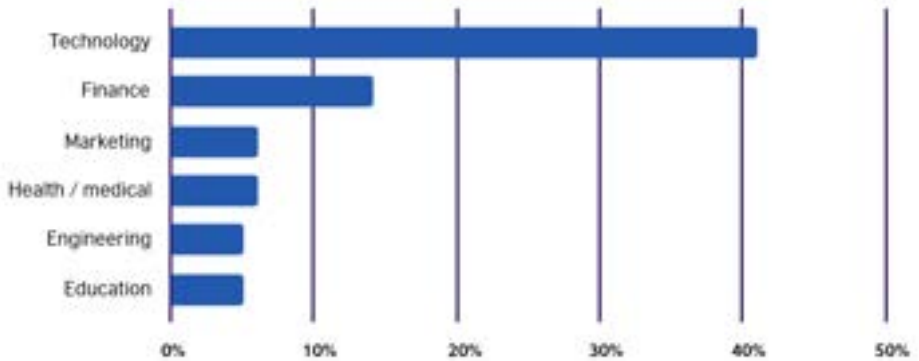


Current study status of respondents to Brazil survey. Source: British Council Brazil Survey by SOS Education Consultancy 2023

Six out of ten (58%) respondents are currently studying. Of those, half (49%) are working full-time while studying, 29% are completing a postgraduate programme, and a further 22% are completing an undergraduate programme.

Almost one quarter of survey respondents (24%) said their studies were complete, while another 17% are in the workplace and not studying at the moment.

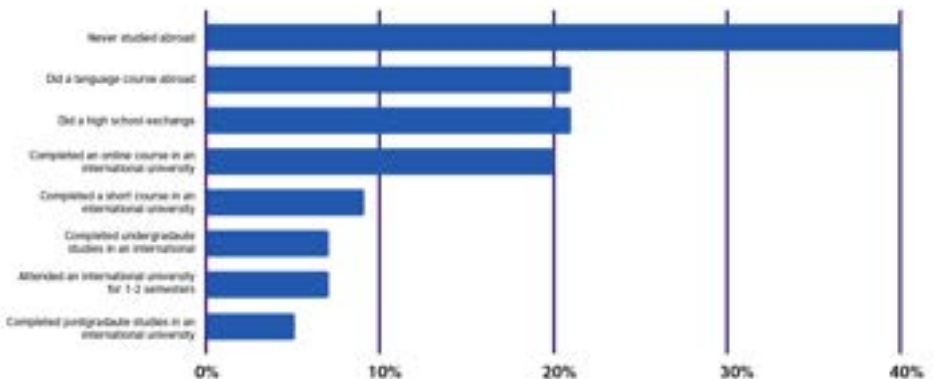
### > Future Career Aspirations



A future career in technology was the most popular option among survey respondents (41%); with finance coming in second (14%); followed by marketing (7%); health (6%); and engineering (5%).

Which of these sectors best describes where you want to pursue your future career? Top six responses. Source: British Council Peru Survey by SOS Education Consultancy 2023 2023

### > Have you ever studied abroad?



Have you ever studied abroad? (select up to three answers). Source: British Council Brazil Survey by SOS Education Consultancy 2023

Twenty-one (7%) of Brazil survey respondents completed their undergraduate studies in an international university; with 14% of those also completing overseas postgraduate studies. Half (52%) of this subset had previously participated in a high school exchange programme; while 19% had completed an international language course.

One in twenty survey respondents had completed postgraduate studies overseas; with 47% previously having completed an overseas language programme. One fifth of those that pursued international postgraduate studies had previously completed their undergraduate studies in an international university.

One-fifth (21%) of respondents completed an overseas language programme; and one fifth of this subset also participated in a high school exchange programme; while 17% of that group had completed an international undergraduate programme; with the same proportion reporting completion of an online programme in an international university; 11% had completed a foreign postgraduate programme; and 12% said they had completed a short course in an international university.

One-fifth (21%) of respondents completed an international high school exchange programme; and 6% also reported having completed an undergraduate programme or a 1-2 semester exchange overseas; while 5% had pursued international postgraduate studies.

## > Have you ever considered studying in a UK university?

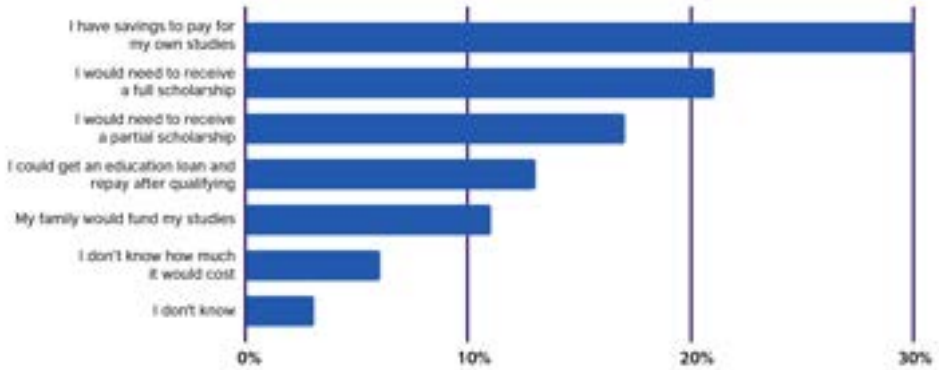
When asked if they had ever considered studying in the UK, 42% responded saying this was their dream (although 9% of these also said that while overseas study was a dream, they had never considered the UK); with 14% of those reporting that they would need to improve their English first; 35% had heard great things about the UK education system; and 30% thought a UK education would improve their career prospects. In this same group, 6% would consider UK study if a loan was available, with the same proportion saying it would only be an option if they were to be awarded a scholarship. A further 9% in this subset would like to complete an online course at a UK university.

Nearly one in five have never thought about studying in the UK, but would consider it; although 29% of these had heard great things about the UK education system; and 23% felt it would be beneficial for their careers. A quarter of this set of people (23%) said their English would need to improve first; 11% of them would go to the UK to study if they could get an education loan; 21% if they got a scholarship.

It is my dream to study in the UK	42%
I have heard great things about UK education	35%
I believe that study in the UK would greatly improve my career prospects	29%
It is my dream to study abroad, but I never considered the UK	24%
I would need to improve my English a lot	17%
I have never thought about studying in the UK, but I would consider it	17%
I have no interest in studying overseas	2%
I would like to complete studies online in a UK university	12%
I could only go if I won a scholarship	11%
I would study in the UK if there was a loan available that I could repay after graduating	8%
I would not like to travel so far from home	2%
Study in the UK is too expensive for me	1%
I have never heard much about studying in the UK	1%

Have you ever considered studying in a UK university? (select up to three responses) Source: British Council Brazil Survey by SOS Education Consultancy 2023

## > How would you fund your overseas studies?



If you were approved to study abroad, how would you fund your overseas studies? Source: British Council Brazil Survey by SOS Education Consultancy 2023

Four of ten (41%) respondents said their studies in the UK could be paid privately (of these, 73% have their own savings, and the remainder said their family could pay for international studies). Some sort of scholarship support would be necessary for 37% of survey

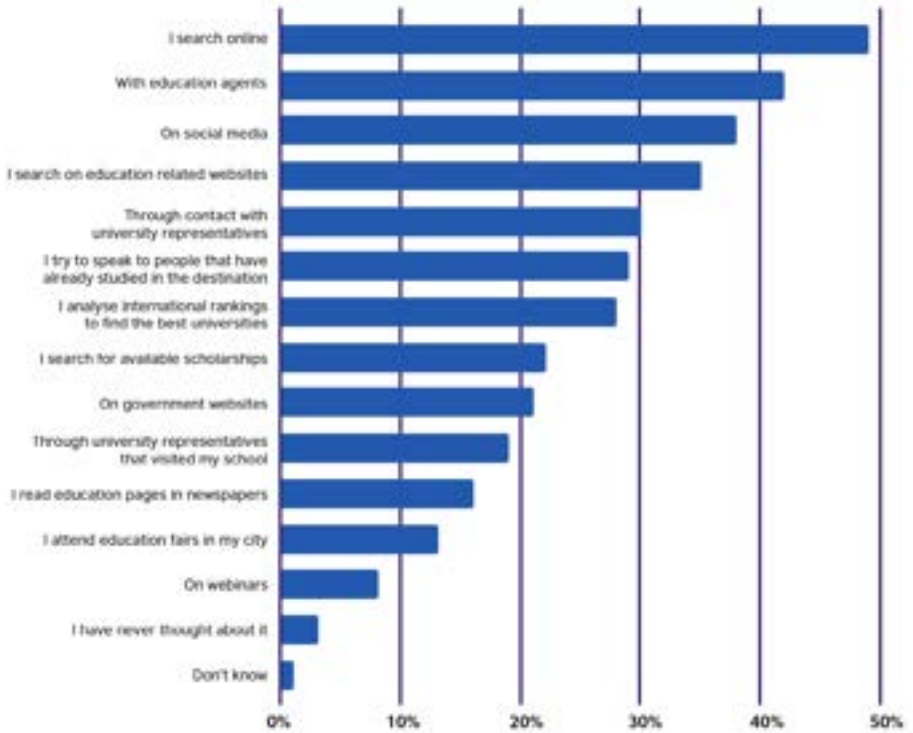
respondents; 54% of that subset would need a full scholarship. Thirteen percent felt they could pursue a loan to pay for studies and repay after their graduation; 6% did not know how much it would cost; and 3% were unsure of how they would fund studies.

## > Best information source about overseas study?

Online searches were the most popular means of finding information about overseas studies, and this option was selected by 49% of respondents; 42% would seek information from education agents; and 38% would look on social media. Education related websites were the place to go for 35%; with another 16% would review education pages in newspapers.

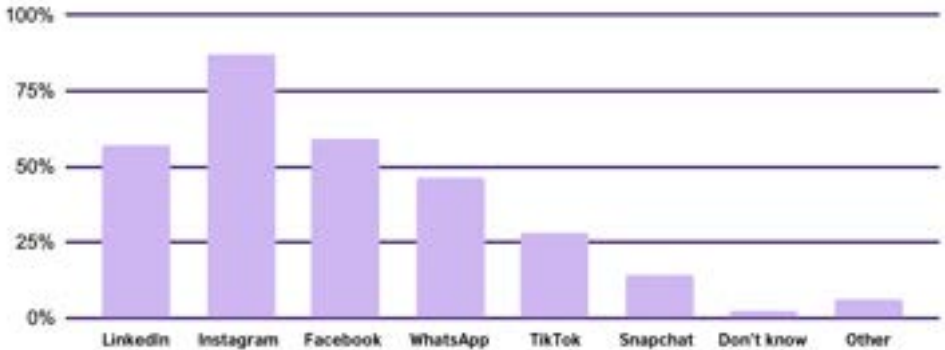
Alumni voices were highlighted as an information source by 29% of survey respondents; while an analysis of international

rankings was a good way to get informed for 28%. One in five (22%) would search available scholarship offers. Nearly half (43%) mentioned contact with university representatives (combining two responses that mention personnel). Only 13% reflected that attending education fairs was their preferred way to seek information about international study options, and webinars were cited by 8%. Government websites were a good information source for 21% that responded to the survey.



Where would you look for information about overseas study? (choose top 5) Source: British Council Brazil Survey by SOS Education Consultancy 2023

> **Best social media for study abroad?**

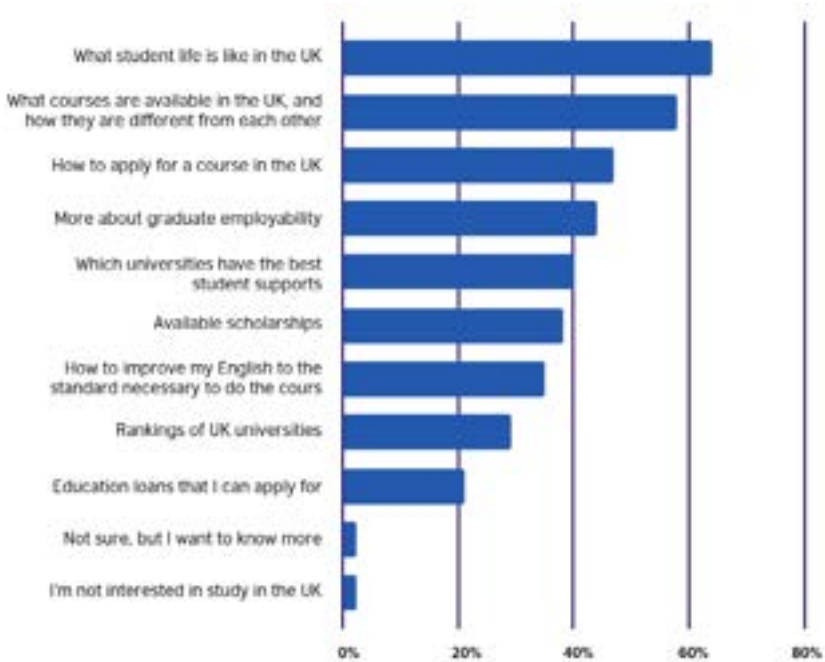


What social media would you use to find out more about study opportunities? Source: British Council Brazil Survey by SOS Education Consultancy 202

Instagram is the best social media source for study abroad information according to Brazilian students, and this was the choice of 87% of respondents, followed by 59% that chose Facebook, and 57% that indicated LinkedIn as a good information source. Just under half (46%)

considered WhatsApp to be a good place to find information; 28% selected Tik Tok; and a further 14% said Snapchat. While YouTube was not given as an option in the survey, the video sharing platform was suggested by 3% of respondents.

## > What do you want to know about study in the UK?

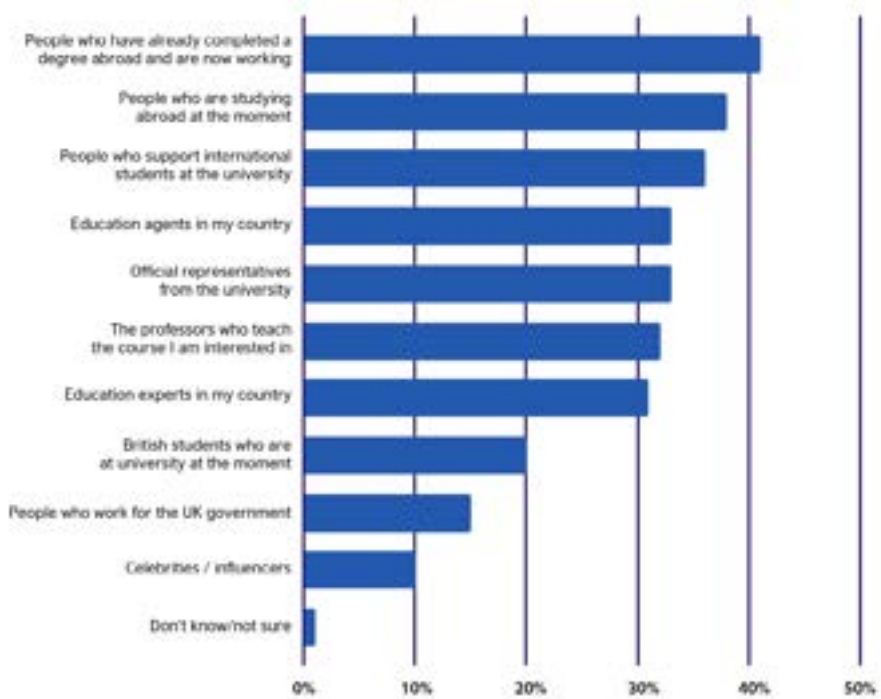


What would you like to learn more about study in the UK? (choose all that apply)  
 Source: British Council Brazil Survey by SOS Education Consultancy 2023

The majority of Brazilian survey respondents (64%) want to know more about student life in the UK; 58% are keen to understand the UK course offer and how certain courses vary from one another; while 47% want to understand how to apply for courses in the UK. Graduate employability is of interest to 44% of respondents; 40% are keen to know which British universities offer the best student support; 38% want to be told about

available scholarships; and 21% are curious about available student loans to support international study travel. For 35% of the sample, it is important to understand how to reach the level of English proficiency needed to study in a UK university; and 29% are interested to know more about international rankings. A mere 2% are not interested in studying in the UK.

## > Trustworthy information sources



If I look for information about studying abroad, I most like to hear from (choose 3)  
 Source: British Council Brazil Survey by SOS Education Consultancy 2023

Brazilian students are keen to hear from their peers regarding the experience of international study, and 41% wish to hear the opinions of those that completed an overseas degree and are currently working; while 38% want to hear from peers that are studying abroad at the moment. They are less interested in testimonials from British students currently in UK universities, and only 20% chose this as a preferred information source. For 55% of respondents, their preference is to connect

with student support officers in destination universities or from university representatives. Education agents were cited by 33% of respondents; 32% would like to hear from the academics that teach on courses that they are considering; while a further 31% wanted to hear from education experts in Brazil. Only 15% would like to access study abroad information from people who work for the UK government; and 10% would like to hear about study abroad from local celebrities or influencers.



# Exclusive Survey

## Agent Snapshot

### Brazil

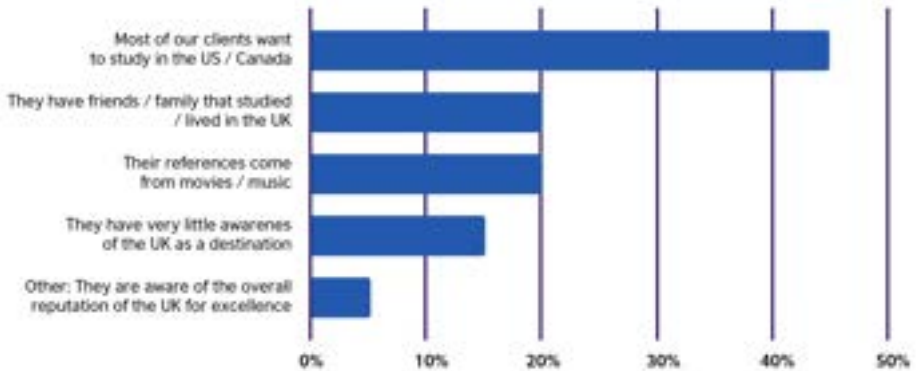
Twenty education agents in Brazil responded to a survey in January 2023 on behalf of the British Council. They were asked a series of questions about how their clients perceive the United Kingdom as a study destination, and invited to identify some challenges faced when selling higher education to their clients. Many questions offered a list of multiple choice responses, and allowed agents to pick more than one option. All questions offered space for agents to give their own response as desired.

Almost half (45%) of Brazilian agents reported that most of their clients wish to study in the

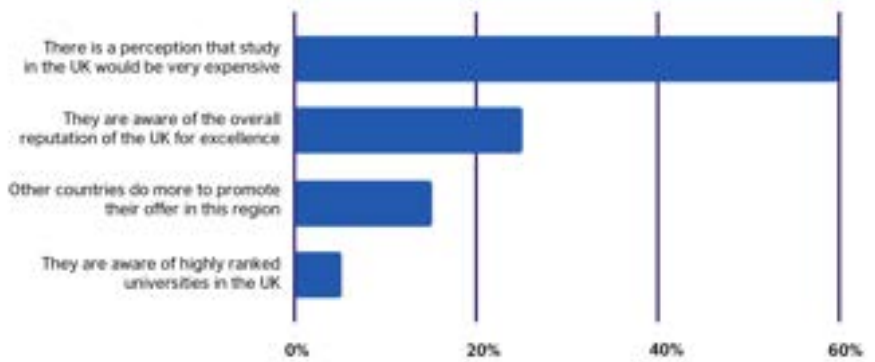
United States or Canada. Two-thirds said their clients had personal or cultural references regarding Britain, either through family or friends that had visited (20%) or through cultural messaging in movies or music (20%).

There was a predominant perception (60%) that prospective students in Brazil view the UK as an expensive study destination; while 15% felt that other countries are doing more in Brazil to promote international study opportunities. A quarter of agents noted an awareness of excellence in the UK among their clients; while one agent said clients are aware of highly ranked UK universities.

### > What do your clients know about the UK as a country?



## > What do your clients know about the UK as a study destination?

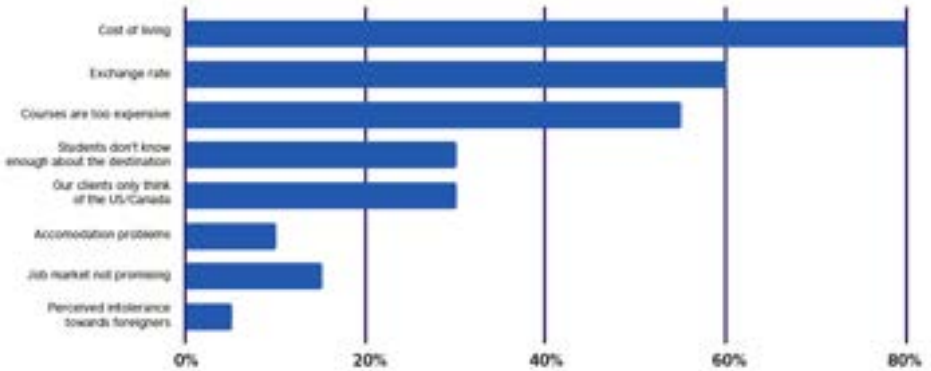


## > What motivates your clients in their choice of institution?

Reason	Proportion of agents citing reason
Permission to work while studying	70%
Cost of course	65%
Cost of living	55%
Exchange rate	40%
Quality of life	40%
Quality of teaching	35%
Proximity to other European countries	35%
Possibility to pay in installments	35%
Cultural aspects	30%
Tourism / cultural opportunities	30%
International rankings	30%
Opportunities to enter the workplace after their studies are complete	25%
Security	25%
Weather	15%
Salary Expectations	10%
Information online / in the media	10%
Family opinions	5%
Other: Future plans in Europe	5%

Brazilian students are price conscious and agents report that permission to work while studying, the cost of a course, the cost of living in a destination, and exchange rates are prime factors when choosing where to study.

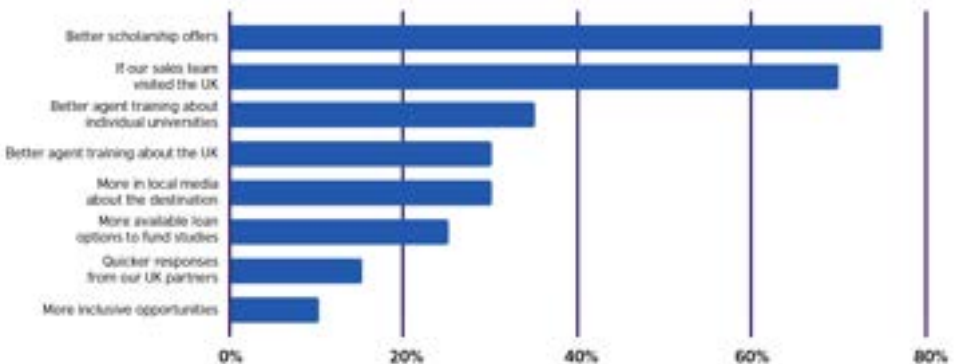
### > What are the main challenges to third level study in the UK?



Cost emerged as a primary barrier when agents identified the main challenges to study in the UK, with 80% citing the cost of living in the UK as a limiting factor; while 55% said UK higher education courses were too expensive; along with 60% citing exchange rates as a

block to sales. Interestingly, 45% of agents in Brazil reported that demand for UK programmes has increased since the global pandemic; 20% said the number of UK-related enquiries has dropped; while 35% reported little change in this period.

### > What might cause demand to increase?



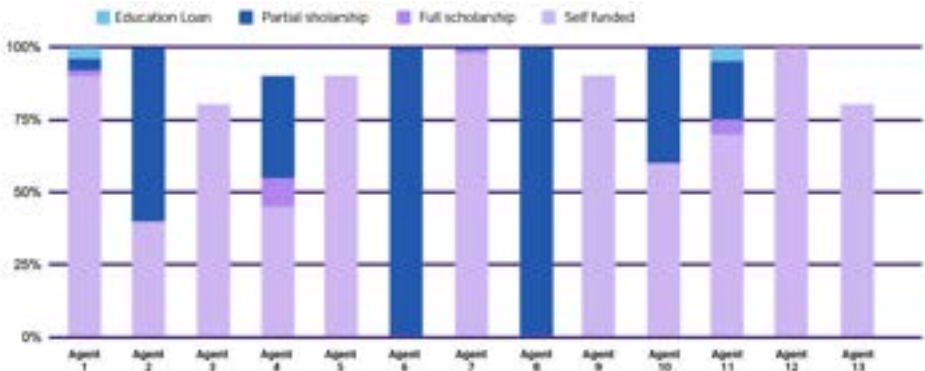
## > What would help you to sell more UK higher education products?

Familiarisation trips to visit British universities	65%
More scholarships	65%
Key contacts / university representatives	50%
Better training regarding the UK as a destination	45%
Clear immigration information	40%
Identification of unique selling points for each university	40%
Relevant employability statistics	25%
Closer alignment with individual universities	25%
More information regarding inclusive opportunities / supports	20%
Regular in-person training sessions for our sales team	15%
Strong alumni testimonials	15%
Regular webinars	15%
Clear salary scales / expectations for graduates	5%
Quick responses from UK partners	5%
Other: Strong advertising about UK education	5%

Besides the fact that Brazilian agents call for more scholarships to help promote the UK as a higher education study destination, there is a clear call for more training and information

regarding the UK offer and Britain as a destination (for sales teams and for clients), as well as a desire for closer proximity for university representatives.

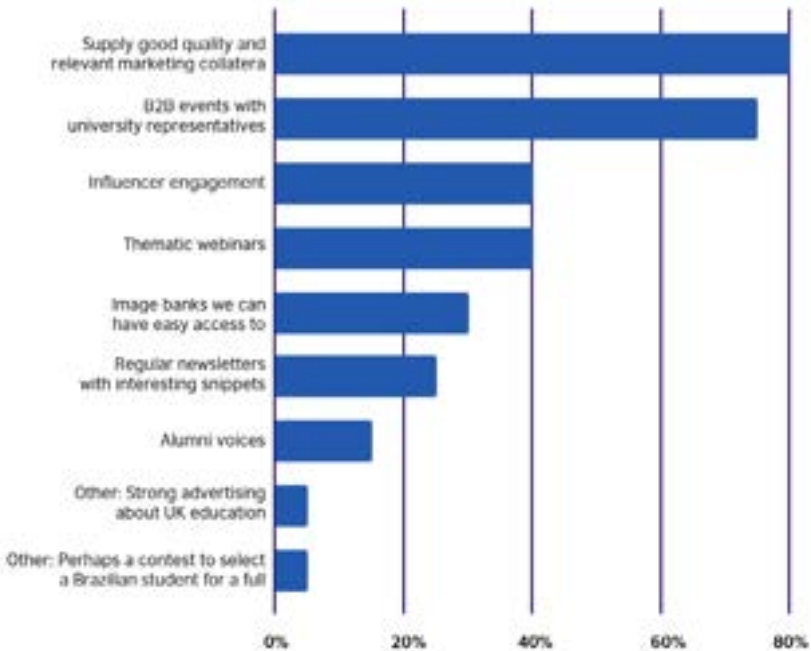
## > How do your university-bound students fund their studies?



While not all agents gave a clear answer to this question, it emerges that the majority of university-bound students in Brazil are paying for their own studies. Only one agent

mentioned an education loan company with which they work, Provi. However, it would seem that this fintech does not support international studies.

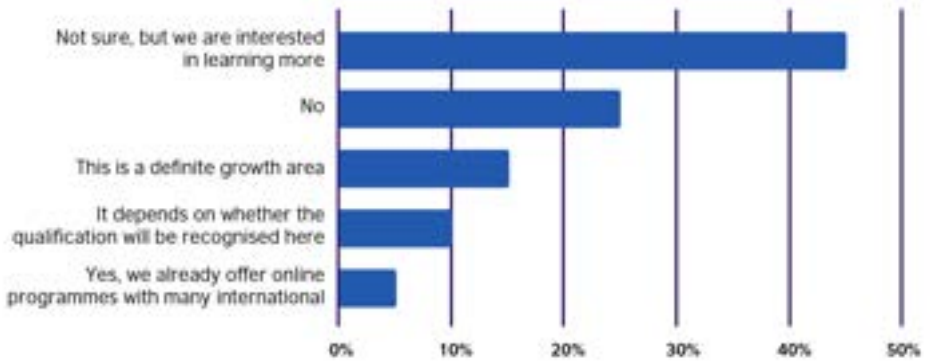
### > How can the British Council support your agency to increase applications?



The desire for closer proximity with university representatives was echoed when agents were asked how the British Council could best support them to increase applications, with 75% requesting B2B events. A supply of good quality and relevant marketing material was

cited by 80% of Brazilian agents; while 30% also said they would like easy access to image banks. Influencer engagement was requested by 40% of Brazilian agents, with the same proportion also looking for thematic webinars; and 15% seeking alumni voices.

## > Do you see a market for an online offer from UK universities?



Quarter of agents (25%) in Brazil do not see a market for an offer of online courses from UK universities, while 55% are interested in knowing more (some stating that the market potential would rest on the validity of qualifications in Brazil). One agent is already offering online programmes with international partners, and 15% of agents said this is a definite growth area.

Most agents (80%) cited emails as the best means of receiving updates and information; with 10% preferring email, one agent wanted to receive updates both by emails and by WhatsApp; and another asked for hard copies of available information.

# Brazil analysis

The United Kingdom enjoys only a 2% market share Brazilians studying abroad at third-level; compared to Canada's 6% share; 11% enjoyed by Australia and 18% in the United States. The resounding feedback from agents was that the UK is perceived as an expensive destination, and that courses are too expensive for price conscious Brazilian students, who do not know enough about the destination. Their clients tend to prefer the United States or Canada as study destinations, both for historical and cultural reasons. Canada's attractiveness likely reflects a desire among Brazilian students for long-term immigration possibilities (also available in Australia).

A weakened currency in recent memory has heavily diluted the spending power of many prospective Brazilian students, driving large swathes to seek cheaper options. Community college options available in Canada and the United States, as well as VET possibilities in Australia, have allowed these markets to cater to a Brazilian middle class with tighter purse strings than in previous times.

It is important to recognise the size of the Brazilian market. There is a significant wealthy class in Brazil that does not share the same financial concerns as others. Political unrest or dissatisfaction often leads Brazilian families to seek overseas study opportunities for their children. Former President Jair Bolsonaro enjoyed significant support upper classes in Brazil, and the recent election of left wing Lula to the presidency may further stoke desires for international studies. While many prospective students in Brazil will seek scholarship opportunities, there are millions of families for whom this is not based on financial need. It is worth noting that partial scholarships are still of interest to families that can afford full fees, as merit-based

scholarships from an international university are viewed culturally as a positive accolade.

While cost emerged as a primary concern for agents in Brazil, with 60% noting a perception among clients that UK study would be very expensive, only 1% of student respondents cited this response, although 11% said they could only consider the option with a scholarship, and 8%

said they would need a loan. This may point to a lack of awareness on pricing in the UK, rather than reflecting that Brazilians actually think the UK is not an affordable study destination. Added to this is the fact that most Brazilians (45%) that study in the UK choose London universities, and therefore have heightened living costs during study periods, perhaps further skewing opinion.

Sustainability is a definite growth area in Brazil, and a clear focus of the new government. Initiatives in the Amazon region are already attracting foreign monetary support, and investment funds track developments as searches for sustainable financing continue to grow. The Brazil-Germany Chamber of Commerce developed research in partnership with the German government in 2021 to analyse 'Professional Education for a Circular Economy', with respect to the solid waste sector in Rio de Janeiro, and found that only 5% of the workforce had completed undergraduate studies, and pointed to an under-representation of women (20% of the workforce is female, while 80% is male). A McKinsey report in [2018](#) suggested that raising the male-female ratio in the Brazilian workforce could add 14% to GDP over seven years.

Women are under-represented in many professional sectors in Brazil, only accounting for 17% of the mining workforce, for example. The Brazilian Mining Institute (IBRAM) has established a goal to nearly double female participation in the sector by 2030. Mining giant VALE increased the proportion of female executives from 16% in 2019 to 20% two years later, and the company recently ran a career acceleration programme for 100 black women.

High levels of informality in the workforce is a stubborn issue for Brazil, even though the current rate of almost 40% is somewhat better than 46% workforce informality in 2011. There are acute skills deficits crossing a range of areas from banking and finance, through IT and manufacturing, and the future skills shortage is predicted to worsen.

Long term immigration opportunities are of interest to Brazilians, who value security and quality of life along with potential salaries as incentives toward international study. The Australian VET offer is interesting, and offers young tradespeople the opportunity not only to certify a new skill set, but also to establish a life down-under, with the possibility of attaining post-study residency.

While engagement with international and IB schools for undergraduate recruitment are recommended in this report, it is important to recognise that not all prospective undergraduate students are in this age bracket, and the typical undergraduate student in Brazil is often considerably older. Recruitment strategies should not be limited to high school students.

Online learning is an undeniable growth area in Brazil, and represents opportunity in the delivery of short courses that respond to specific skills deficits and offer a differential from the Brazilian curriculum, as well as the offer of longer programmes. However, it is

worth noting that internationally awarded degrees do not enjoy automatic recognition, unless offered in partnership with a Brazilian university.

There is a demonstrated interest in online programmes from international universities, and 20% of students survey respondents already completed online studies in international universities, while 12% are interested in online studies offered by UK universities. This is definitely worth exploring further. An offer of short online courses at an accessible price point can offer great scaling opportunities, as well as the potential to further develop UK university brands in Brazil.

Online searches are the first port of call for students when searching for information about study abroad, so it is important that website content is optimised to enjoy prime real estate in internet search results. There is so much content available online and many students struggle to decipher between fact and sales talk, so it is important that official information sources enjoy high visibility on search engines. One in five Brazilian students would get information from university representatives that visited their schools, and it is clear that those universities that have an in-market presence and close liaison with schools can become a point of reference for the destination.

Higher education sales are a relatively new departure for many agencies in Brazil, and the sales process is much longer (and potentially more lucrative) than short or medium term language programmes, which agents traditionally sold. Families may approach agents a number of years before the departure date, while their children are considering international study options, and many Brazilian agencies offer paid counselling programmes to help students decide on future career areas. In order for agents to feel comfortable to seriously sell the UK as a study destination,



they must feel confident that they fully understand the offer, price point, immigration procedures, employability and career prospects.

While 40% of Brazilian agents were of the opinion that influencer engagement would help to boost their higher education applications to the UK, this is not backed up by student opinion, with only 10% citing celebrities as a trustworthy information source. Influencer engagement is not recommended at this time.

# Recommendations

## > High-level engagement

- Further engagement is recommended with the Ministry of Education, who have expressed a desire to explore the potential offer of VET-type courses in partnership with the UK.
- Exploration is also worthwhile with the Ministry of Education and Ministry of the Environment regarding sustainability and the circular economy, with a view to benchmarking best practice and certification in the area through short professional courses (potentially delivered online).
- Follow-up is recommended with the Ministry of Education regarding the mutual recognition of qualifications.
- Engagement with the newly formed Ministry for Racial Equality is recommended with a view to tailoring some scholarship initiative specifically for black and indigenous Brazilians.
- Liaison with industry associations like the Brazilian Association of Software Companies or the Brazilian Mining Institute is recommended with a view to creating partnerships to address their specific skills needs through training programmes.

## > UK engagement

- An assessment should be carried out to discover which UK universities are already active and have representation in Brazil, so that they may be offered immediate support in destination branding.
- A further assessment should measure what is available from UK universities in terms of short online courses, so that this option may be further explored.
- UK universities should be very clear on their unique selling points, and aim to market a select group of specific courses, offering data regarding salary expectations, graduate employability rates, as well as alumni voices.
- It can be worthwhile for universities to select a few course areas, and actively promote them to niche audiences, with focused geo-localised digital marketing campaigns, and thematic webinars, etc. With huge competition for the attention of Brazilian students, it is important to develop focused strategies that respond to market demands.
- Universities should ensure that presentations are updated, interesting and engaging - not all students really need to know a protracted history of how the university evolved through time - they want to know how they will fit in and be welcomed, and the return on investment - how this choice will impact their future lives.

## > Brand building

- #StudyUK should be developed as a standalone brand with key messaging and content available in Portuguese. Such brand identity will be important to give a strong message that something new is happening in the market.
- A Portuguese version of the [Study UK](#) platform should be launched following a strategic media campaign including an invitation for students to attend launch events in key cities: São Paulo, Rio de Janeiro, Brasília, Belo Horizonte, Curitiba, Salvador. The site should be open to all, but require some sign-up so that universities can communicate with interested students, and measure engagement from the market.

## > Student Recruitment Events

- While participation is worthwhile in existing events organised by BMI, FPP, and others, the organisation of #StudyUK events is highly recommended in key cities, with B2B meetings also set up in these locations for UK university representatives to meet with agents and school counsellors.

## > Communications strategy

- Once brand messaging is identified, it will be important to identify key education-related media and journalists and develop a plan to supply them with interesting and relevant material.
- Lead generation should be central to all parts of the communications strategy, ensuring that there is always a call to action, and students that sign up for certain activities should enter an email list to receive practical, pertinent and relevant information.
- Brand sponsorships of sites like [Estudar Fora](#) will be an excellent vehicle to communicate messaging to large audiences.
- Plan a webinar series based on specific skills needs identified in this study, and invite experts in specific fields to deliver a Masterclass, preferably with some certification of participation based on the amount of time the student was present, even online.
- Communications should be in Portuguese, and relevant to a Brazilian audience, not just a copy and paste from global messaging. This article, for example, details [UK universities that accept the Brazilian ENEM exam](#).
- Key messaging that will resonate with Brazilian students include: How to strengthen your resumé while studying abroad; UK companies that accept international interns; Step-by-step guide to choosing the course for you; Understanding the Foundation Year; Do my high school grades matter if I want to study overseas?; How to live in the UK on a budget; Checklist for applying for scholarships; Ten tips to quickly improve your English; as well as social media posts relating to commemorative days in Brazil and in the UK, cultural oddities, touristic images.

- Development of #StudyUK social media pages in Portuguese is advised. While students said they would look on Facebook for student abroad information, there is more evidence of engagement on Instagram.
- Broadcast lists for WhatsApp and Telegram should also be considered, but specific care is advised to avoid bombardment with irrelevant or repeated messaging.
- Arrange B2B meetings with representatives from UK universities so that agents have a point of contact in each university and realise the unique selling points.
- Produce a portfolio of marketing material in Portuguese so that agents have a range of resources available to them as they promote the UK as a study destination. It is important to have messaging in Portuguese so that parents can easily understand the offer. Messaging should include clear immigration information for Brazilian students; realistic costs for study in the UK; various scholarships that are available; employability statistics; alumni testimonials.

## > Agent relationships

- Continued engagement with Belta and other non-Belta agents is recommended, so that as many as possible complete available training. Brand sponsorship at Belta events and in their annual international education magazine is recommended, and the option for paid advertising should be communicated to the UK university sector.
- UK universities should be aware of the need for due diligence when signing new partnerships with agents, particularly those that are not within the Belta group, and it is important that references are checked to avoid brand damage through work with low-quality agents.
- Agents should be invited to give feedback regarding the British Council [‘UK agent and counsellor’](#) training so that they can identify any areas they feel are not sufficiently covered. Annual national training events are held by many multi-branch agencies, and these provide an excellent opportunity to get brand messaging to sales managers dotted around the country, and not just in head office.

## > EdTech Platforms

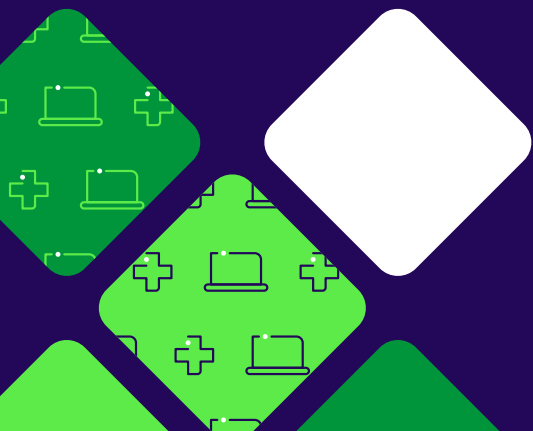
- Some engagement is recommended with companies that offer solutions to large groups of agents, to ensure that messaging regarding the UK is up-to-date and accurate. Adventus has links with 110 agents in Brazil, while ApplyBoard boasts engagement with 121.
- Any offer of short programmes that can be offered to high school students, particularly during school holidays in the month of July (or January), should be considered. Schools are moving away from the traditional international language programmes during mid-term breaks towards more thematic and career-focussed school tours, and this is an optimum opportunity for universities to showcase their academic offer and infrastructure at a time of year that campuses are generally empty in the UK.

## > School Networks

- It is important to build a network of international and IB schools in Brazil, and ensure that high school counsellors are offered British Council [‘UK agent and counsellor’](#) training. An additional offer of [specific workshops](#) to impart certain skill sets to counsellors regarding career areas, soft skills, etc., is further recommended.
- Some blend of English language classes and cultural activities should be incorporated into short youth programmes, which can be developed and marketed in partnership with agents, or marketed directly to schools. An emphasis on the development of soft skills is recommended in the marketing of such programmes.

# Colombia

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# Colombia

Population	51 million
GDP 2021	USD \$315 billion
Unemployment	9.5% (November 2022)

## Main recommendations:

- Launch Spanish version of #StudyUK platform with events in key cities Bogotá, Medellín, Barranquilla, Cali
- Liaise with industry associations to address skills needs
- Partnership with ANEX to foster development of strong agent networks
- National communications campaign to raise awareness of the UK as a high quality study destination
- Investigate appetite for UK online offer

## Market Overview

Colombia is the sixth largest economy and the third most populous nation in Latin America, reporting a nominal GDP of almost [\\$315 billion](#) in 2021. An [OECD study](#) in February 2022 concluded that Colombia’s economy recovered “remarkably well” from the COVID-19 pandemic, citing strong fiscal policy. However, nine months later the [OECD](#) forecast a sharp drop in GDP growth from 8.1% in 2022, to 1.2% in 2023, with only modest improvement expected in 2024 (1.7%). Annual consumer price inflation hit [12.22%](#) in recent months, the highest rate in 23 years, although double digit inflation rates are not extraordinary in the current Latin America context. Despite the global pandemic, tourism generated around USD \$1.96 billion in 2020. Although less than 1% of GDP, it equates to around [18%](#) of international tourism takings in South America.

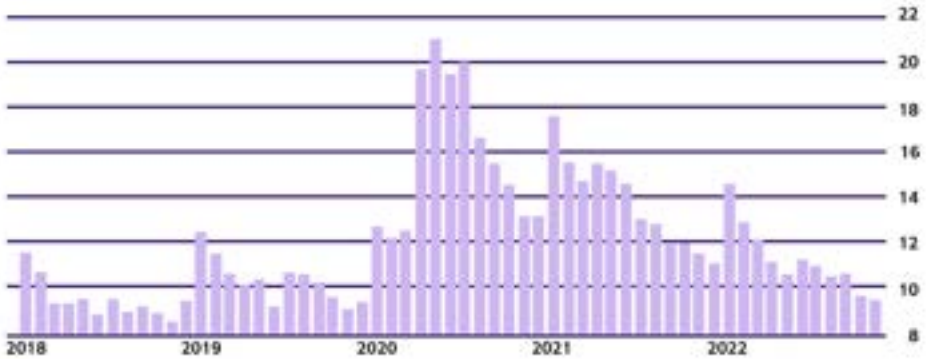
## > Political scenario

In June 2022, Gustavo Petro became Colombia’s first left-wing president. The former guerilla fighter, who served as congressman, senator, and mayor of capital city Bogotá, governs alongside Colombia’s first black vice president, esteemed human rights lawyer, Francia Márquez. Despite initial fears of electoral violence, there was a peaceful transition, with centre-right incumbent President Rodolfo Hernandez quickly conceding defeat after the result was declared – a highly positive development and an encouraging sign for a country long marked by political violence and turmoil.

Among the new government’s planned reforms is a remodelling of Colombia’s social strata – class distinctions based on criteria relating to one’s address and physical attributes of their

homes, and not on household earnings. [Analysts](#) suggest this system blocks access to state subsidies to poor people living in wealthier strata, and vice versa.

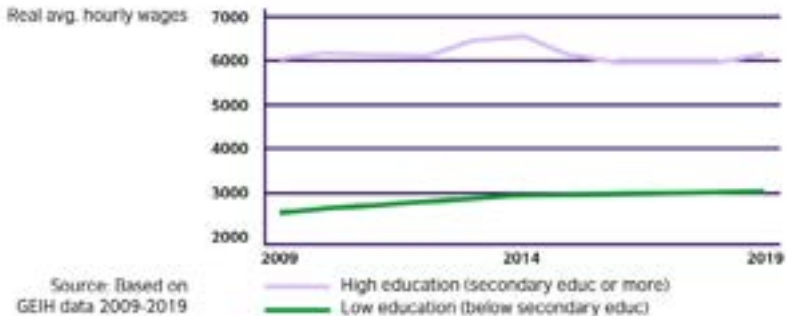
## > Unemployment



Unemployment in Colombia 2018 - 2022. Source: [TradingEconomics.com](https://tradingeconomics.com)

Unemployment [increased](#) dramatically during the pandemic from 10% in 2019 to over 15% a year later, but has already corrected, retracting to 9.5% in November 2022. Nevertheless, national statistics agency [Dane](#) showed more than half (58%) of the population was in informal employment in September 2022, mostly in the country’s northern regions, with much lower rates of informal employment in Bogotá and Medellín, Colombia’s two largest cities.

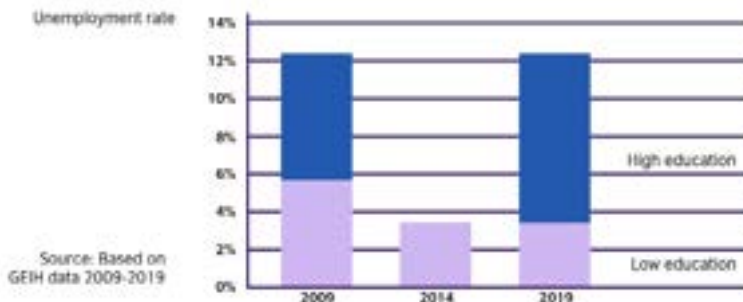
According to [Dane](#), women make up 67% of the country’s newly employed and considered drivers of the employment rate increase in Q3 of 2022. In the age group of 25-54 years old, this number was even higher, 75%. However, given that the highest growing sector for employment was in lower paying industries affected by lockdowns (Commerce and Vehicle Repairs), it may be argued that many of Colombia’s ‘newly employed’ are simply returning to the workforce after an extended hiatus.



Source: (Based on GEIH data 2009-2019)

Average hourly rate of pay, by education level. Source: [World Bank](https://www.worldbank.org)





Rate of unemployment, disaggregated by education level. Source: [World Bank](#)

## > Skills Shortages

Over the past decade, Colombia has been transitioning away from manufacturing towards a more service-based economy. Manufacturing dropped from 16% to 12% of GDP from 2009 - 2019, services grew from 62% to 68%, while employment in manufacturing dropped from 19% to 13% in the same period. Services jobs grew, if modestly, from 60% to 63%. Although Colombia’s unemployment rate decreased midway through this transition, it rose through the second half. An increase in new higher education graduates entering the market at a time marked by a reduction in demand for skilled labour is a potential driver for hiked unemployment rates.

While Colombians with at least secondary education can expect higher salaries than those with lower educational attainment, graduate job prospects have deteriorated. [World Bank](#) data shows the share of highly educated workers among the unemployed rose by 6% (from 63% to 69%) between 2014 and 2019. However, a late-2022 ‘Net Employment Outlook’ report by [ManpowerGroup](#) showed increased hiring across several areas, particularly among small businesses. The report suggested that hiring climates had improved in five of eleven industry sectors analysed, and weakened in a further five. ManpowerGroup suggested that Colombia’s most competitive sectors were education, health, social work, and government.

The digitisation of the Colombian economy is worth considering, and in a recent company survey by Experis (the IT arm of ManpowerGroup) 48% noted increased digitisation of operations. [Ricardo Morales](#), general director at Experis, highlighted a demand for “cloud-native developers, experts in containers, security and architecture design, machine learning and AI” that already exceeds availability. Experis estimated that almost two-thirds of organisations lack the necessary skills to implement their digital transformation strategy.

The Colombian Chamber of Informatics & Telecommunications (CCIT) points to a lack of adequate qualified professionals in areas like big data, cybersecurity, data science, blockchain, among other IT areas. CCIT President [Alberto Samuel Yohai](#) said at least 370,000 IT jobs are created annually in Colombia, which in turn create further opportunities. “For every job created in the ICT sector, 3.6 additional jobs are created in other sectors of the economy” he explained. Meanwhile, Ruta N, a Medellín recruitment platform, said a lack of proficiency in English added to acute talent shortages, noting that more than 90% of job specifications in the IT sector include a requirement for fluency.

## > Education

School / Level		Grades	Age	Years
Primary	Elementary Level	1-5	6-12	6
Middle	Basic Secondary	6-9	12-15	3
Secondary	Mid Secondary	10-11	15-17	2
	Vocational	-	15-18	3
Tertiary	Undergraduate	-	-	4-5
	Master's	-	-	2
	PhD	-	-	2-4

Education system in Colombia. Source: [Scholaro.com](https://www.scholaro.com)

Schooling is compulsory in Colombia until the ninth grade (around the age of 15), with Spanish the primary language of instruction, although some indigenous languages are included regionally. Vocational education is offered as a pathway, with employers and colleges building curricula in the context of an acute shortage of university places. Third level education comprises technical institutions and technological and academic universities. Access remains somewhat restricted to wealthy urban families, and is not a realistic hope for huge swathes of the population. However, the number of university students in Colombia increased by [140%](#) from 2002 to 2020 from 1 million to 2.6 million.

Educational levels vary from urban to rural settings with the latter comparing poorly, often due to lower qualification levels of teachers among other challenges, and socioeconomic status is a prime indicator of educational attainment in Colombia. The OECD [\(2021\)](#) reported that the proportion of children in the bottom quartile of the PISA ESCS index (economic, social and cultural status) achieving 'Level 2' in reading was 56% lower than those in the top ESCS quartile. The OECD average is 29%

Around one-third (27%) of total expenditure in pre-primary schooling came from private sources in 2021, considerably higher than the OECD average of [17%](#), while 20% of third level

funding is private, as against the OECD average of 30%. Annual public expenditure per full-time student (from primary through to third level) was USD \$2,425 in 2018 (a quarter of the OECD average), and salaries were the single biggest education spend. While it is expected that salaries for teaching staff would increase incrementally depending on their level of formal qualification, maximum teaching salaries in Colombia can be from 278-338% higher than pay for teachers with only minimal qualification (although most real salaries fall between minimum and maximum levels). Across the OECD, the variance between salaries for teachers with maximum and minimum training levels is around 86-91%. The pandemic had a considerable impact on schooling in Colombia where the number of days that schools were fully closed was much higher than the OECD average.

The [Ministry of Education](#) noted that the pandemic did not impact third level participation as much as was feared at the outset.

Universities have developed strategies to modernise learning models incorporating digital media, and enrolment is growing in online programmes following the publication of [Decree 1330](#) in 2019 (49% growth was recorded from 2020 - 2021).

[Courses](#) in the field of business and economics are most popular in Colombia and account for 33% of undergraduate students and 31% at postgraduate level. Engineering is the second preferred area of study for 31% undergraduates, followed by 11% that choose social sciences and the humanities.

This trend is reversed at postgraduate level with 24% choosing social sciences above the 16% that for programmes in the field of engineering, architecture and urbanism.

## > English Proficiency

The [Education First English Proficiency Index](#) ranks Colombia at 77 out of 111 assessed countries (17 of 20 in Latin America), and with the country average of 477 lower than the global average of 502 earns the title of ‘Low’ proficiency level. Some regions and cities, however, scored above the global average, and are considered to have ‘Moderate’ proficiency. Proficiency was lowest among the 18-20 age cohort in Colombia (average score of 427), while the 26-30 age group was the only

one to score above global average, and to be considered ‘Moderate’ proficiency (average score of 521).

However, analysis of the UNESCO [top ten destinations](#) for internationally mobile third level Colombian students shows that 25% (14,000 students) go to English speaking countries, indicating that there is a significant proportion of students that do command fluency in the language.

City	EF Proficiency Score	EF Proficiency Level
Armenia	516	Moderate
Barranquilla	510	
Medellin	506	
Bogotá	503	

Colombian cities with ‘Moderate’ English language proficiency according to EF. Source: [EF 2022](#)

The Ministry of National Education (MEN) launched a plan in 2014 for at least 20% of medical graduates to classify at intermediate or higher levels of English proficiency, as part of a policy objective to position Colombia as a health and wellness tourism destination. Four years later, Colombia National University reported that 28.6% of medical students had the desired level of English. While this was considered ‘satisfactory’ in the context of the 2014 goal, it was noted that only around a third (37%, or 16 of 43) of medical programs in Colombia achieved the target.

‘Colombia Very Well’ is a ten-year National English Programme launched in 2014 to make Colombia not only the [“most educated country in Latin America by 2025, but also the country in South America that best speaks English”](#). The plan centres on teacher training, increased English proficiency among the university attending population, as well as articulation with Colombia’s productive sector, with a proposal to subsidise English training for up to 40,000 workers in the private sector. Critics of an earlier programme, the 2004 National Bilingualism Programme ([PNB](#)), noted

a lack of qualified teachers and other necessary resources as well as a dearth of opportunities for young Colombians to practice everyday English.

A 2019 [study](#) published by Maple Bear, a Canadian education network, suggested that the supply of bilingual schools in Colombia does not meet demand (with just 3.5% of private school children attending bilingual schools), and noted that the number of dual-language schools had only grown by 3% over four years. The study noted that 45% of bilingual schools in Colombia are concentrated in Bogotá.

## > Internet Penetration

The global pandemic accelerated the digitisation of Colombian society, as more people gained online access. In December 2021, there were 38 million mobile internet accesses, a growth of 17% over twelve months, along with 8.4 fixed access points (growth of 8% year-on-year). [Revenue](#) from fixed internet access grew by more than 10% between the last quarter of 2020 and that of 2021, with telecommunications company Claro dominating the market (38% market share). In Bogotá, 93.2% of people aged 18 - 28 were online in 2020, according to Colombia's National Administrative Department of Statistics (DANE).

## > Social Media Use

According to government [data](#), a quarter of Colombia's internet users (26%) communicate via social media and 98% use WhatsApp as their primary form of communication. Meta dominates the country's social media landscape, according to the [We Are Social Digital 2022 Global Overview Report](#) which showed that 'finding information', 'learning how to do things', and 'keeping in touch with friends and relatives' are the main reasons Colombians use social media. WhatsApp, Facebook, Instagram, and FB Messenger are the top-4 platforms. The most prolific users are aged 25-34 across Facebook, Instagram and LinkedIn, with this age cohort accounting for 14%; 17%; and 62% of users, respectively.

Social Network	Colombian Users
Facebook	<a href="#">39,529,300</a>
Instagram	<a href="#">18,696,300</a>
LinkedIn	<a href="#">11,687,000</a>

Number of Colombian users of social networks in December 2022. Source: [NapoleanCat.com](#)

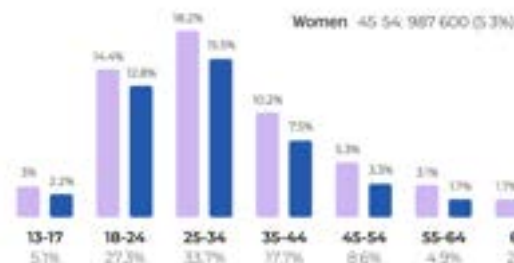
**Facebook users in Colombia**  
December 2022



**39 529 300**

**51.4%** Women  
**48.6%** Men

**Instagram users in Colombia**  
December 2022

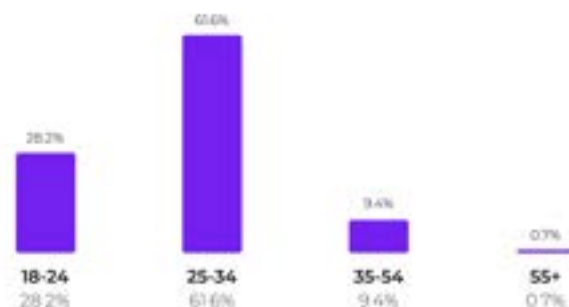


Women: 45-54: 987 600 (5.3%)

**18 696 300**

**55.8%** Women  
**44.2%** Men

**LinkedIn users in Colombia**  
December 2022



**11 687 000**

# Student Mobility

Colombia is the [second largest](#) sending country of international students in Latin America (after Brazil), and nearly 57,000 students were completing international university programmes in 2019, according to [UNESCO's 'Global flow of tertiary-level students'](#). The United Kingdom is the twelfth most popular destination for Colombian third level students, and commands 2% market share.

OECD 2019 [data](#) suggests that only 2% of tertiary students go abroad to study, and Argentina is the most popular destination hosting around a quarter of Colombia's international mobile students. The United States (17%), Spain (12%), Australia (8.5%) and France (7%) are the next most popular.



Global flow of tertiary-level students from Colombia. Source: [UNESCO](#)

#	Destination Country	Number of Mobile Third Level Students	Percentage of all Mobile Third Level Students
1	Argentina	13,482	24%
2	Spain	7,309	13%
3	United States	7,115	13%
4	Australia	6,853	12%
5	Germany	3,529	6%
6	France	3,242	6%
7	Chile	2,466	4%
8	Ecuador	2,170	4%
9	Canada	1,893	3%
10	Brazil	1,806	3%
12	United Kingdom	914	2%
<b>Sum of Top 10</b>		<b>49,865</b>	<b>88%</b>
<b>English Speaking in Top 10</b>		<b>13,968</b>	<b>25%</b>
<b>Overall Total</b>		<b>56,910</b>	<b>100%</b>

Top ten countries receiving third level students from Colombia. Source: [UNESCO](#)

# Looking to the Competition

## > United States

The United States is the most popular English-speaking destination for university students from Colombia, according to UNESCO [figures](#). Colombia was the [nineteenth](#) biggest source market for international students in the US, with 37% pursuing undergraduate programmes, and 40% studying at postgraduate level, worth some USD \$319 million to the US economy.

Colombian Foundation COLFUTURO has supported 4,846 graduates to study in the United States with scholarship loans since 1992 at a cost of USD \$191.2 million; 4,245 of whom pursued masters programmes, while 601 were supported for doctoral studies. In 2022, 311 Colombian students availed of this scholarship loan for studies in the US.

Academic Level	Number of students	% of Colombian students	% change (2020 to 2021)
Undergraduate	2,660	37%	-12%
Graduate	2,847	40%	-1%
Non-Degree	326	5%	-46%
OPT	1,274	18%	0.2%
Total	7,107	100%	-

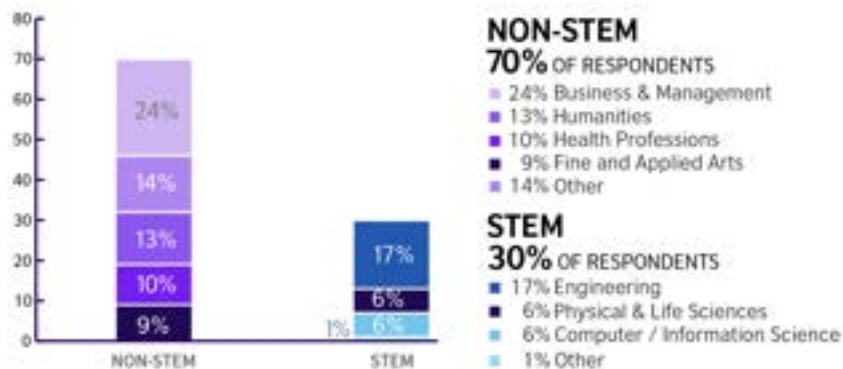
Colombian students in the US by academic level, and percentage change 2020 - 2021. Source: [US Department of Trade](#)

Year	Number of Brazilian students	Year-on-year change
2015	7,159	-
2016	7,815	9%
2017	7,982	2%
2018	7,976	-0.07%
2019	8,060	1%
2020	7,787	-4%
2021	7,107	-9%

Source: [US Department of Trade](#)

US Institution Type	%
Associates Colleges (Two Years)	16%
Baccalaureate Colleges (Four Years)	3%
Masters Colleges & Universities	13%
Doctorate Granting Universities	65%
Special Focus Institutions	4%
Public Institutions	63%
Private Institutions	37%

Colombian students in the US by US institute type. Source: [US Department of Trade](#)



Programme interests among Colombian students. Source: [Intead 2019](#)

## Top 5 Influencers

Most Important Factors When Selecting a University in the U.S.:



Top 5 influencers for Colombian students when choosing a university in the United States. Source: [Intead 2019](#)



[EducationUSA Colombia](#) has eleven advice centres across the country (Armenia, Barranquilla, Bogotá (3), Bucaramanga, Cali, Cartagena, Manizales, Medellín, Pereira), from which they offer webinars, alumni activities and guidance for Colombian students wishing

to study in the US. EducationUSA also organises an annual in-person fair for US university and college representatives to meet with prospective students. The local website boasts a 24-hour online advisor service, however the link is not active.

Social Network	Number of followers	Average engagement
<b>EducationUSA Colombia</b>		
<a href="#">Instagram</a>	10,800	69
<a href="#">Facebook</a>	14,714	6
<b>EducationUSA Global</b>		
<a href="#">LinkedIn</a>	23,917	-
<a href="#">Instagram</a>	107,000	-
<a href="#">Facebook</a>	475,000	-

[EducationUSA Colombia](#) is active on Facebook and Instagram, with posts relating to available scholarships, and highlighting more than 120 US partnerships with COLFUTURO scholarship loan foundation. Engagement is markedly better on Instagram. On LinkedIn, EducationUSA posts to a global audience.

Social media presence of EducationUSA in Colombia, with number of followers and average audience engagement on posts.

## > Canada

Colombia is the eleventh largest source market for international students in Canada, and the third largest source market in Latin America (after Brazil and Mexico). While there was an inevitable dip in student mobility during the global pandemic, Canada’s recovery in 2021 was impressive. Canada is a highly popular destination for Colombian students with the potential for permanent residence a very attractive proposition, as well as the possibility to study at less-expensive colleges, many with local representatives in Colombia, catering to Latin American students.

Año	Número de estudiantes colombianos	Cambio anual
2015	1,295	-
2016	1,675	29%
2017	2,375	42%
2018	3,275	38%
2019	4,445	36%
2020	3,010	-32%
2021	6,845	127%
2022	10,150	48%

Colombian study permit holders in Canada 2015 - 2022. Source: [IRCC](#)

EduCanada uses its global pages to promote the Canadian offer, and does not have a Colombia-specific social media presence. Despite having many more followers on Facebook, more engagement is seen on Instagram. Social media messaging focuses on scholarship offers, profile posts on individual colleges (including details of their support services), and graduate employability.

Social Network	Number of followers	Engagement
<b>EduCanadá (Global)</b>		
<a href="#">Instagram</a>	3,727	47
<a href="#">Facebook</a>	72,000	30
<a href="#">LinkedIn</a>	3,693	6

Social networks used by EduCanada; number of global followers; average level of engagement on ten posts.

## > Australia

Colombia was the [fifth](#) biggest source market of international students in Australia in 2022, a considerable improvement since 2015, when it was 15th. While the pandemic had an inevitable impact on student numbers, this was less acute than in Brazil for example, although it is not clear why this was the case. Recovery in 2022 has been significant, as student numbers approach pre-pandemic levels.

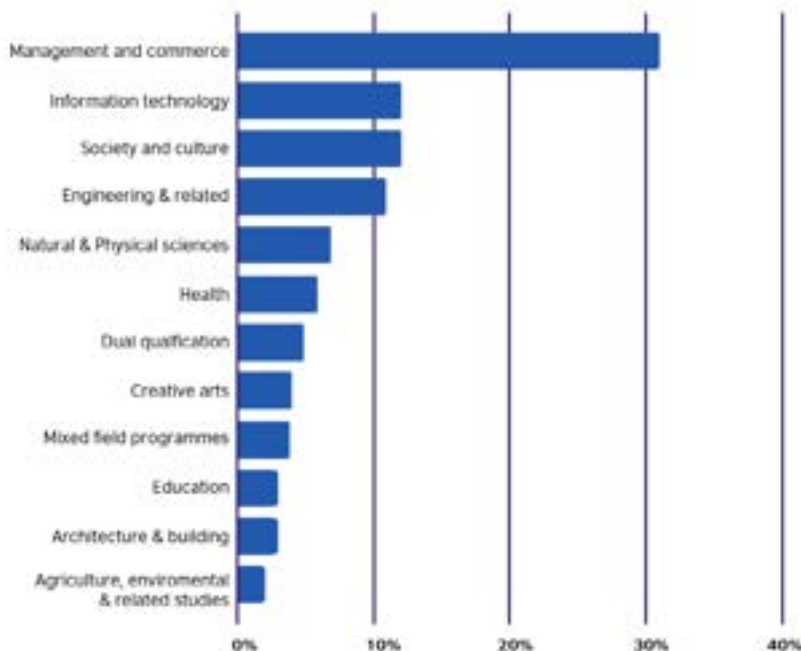
Higher education students represented 7% of Colombian student enrolments in Australia from January - October 2022, according to Department of Education figures; and VET students account for more than half (53%) of student traffic; while 40% of Colombian students in Australia are completing language programmes. The majority of Colombian students in Australian higher education institutions are pursuing postgraduate studies (66%). The most popular field of study was management and commerce (31% of enrolments) followed by information technology and society and culture (12% respectively); closely followed by engineering and related technologies.

Year	Number of Colombia students	Year-on-year change
2015	9134	-
2016	11,222	23%
2017	14,108	26%
2018	16,931	20%
2019	20,715	22%
2020	18,853	-9%
2021	14,666	-22%
2022	19,687	34%

Colombian students with student visas in Australia 2015 - 2022, and Year-on-year change. Source: [Australian Government Department of Education](#)

Provider	Student numbers	Percentage
VET	13,066	53%
ELICOS	9,901	40%
Higher education	1,753	7%
Schools	25	0.1%
Non-award	9	0.03%

Enrolment numbers in Australia from Colombia January - October 2022. Source: [Australian Government Department of Education](#)



Colombian higher education enrolments in Australia by field of education, January - October 2022. [Australian Department of Education](#)

Much of the promotional work in Colombia is handled by Austrade (Australia Trade and Investment Commission), the diplomatic network and individual universities and colleges with in-market representatives. The [“Study Australia Experience”](#) platform was launched by Austrade in January 2022 with Spanish content relating to scholarships, individual profiles for Australian institutions, and a search engine to help students identify where specific courses are offered.

A regional [communications campaign](#) with targeted advertising reached 20 million prospective students in the region in the first six months, bringing 310,000 thousand visitors and 37,000 registered users to the platform. Dozens of live events were held in the region to promote Australia as a destination and its education institutions, involving alumni

ambassadors, university representatives and education agents, and a three hour virtual fair was held in June 2022 for 1,700 prospective students.

In December 2022, an event in Spanish, ‘New benefits for studying in Australia’, was promoted across Latin America. Phase two of the initiative will include longer event duration, more space for institutions and increased and refined social media and digital marketing activity. Australian institutions were invited to meet with IB schools across Latin America in 2021, organised by Austrade.

There was a Study Australia pavilion at BMI student recruitment fairs in Colombia in 2022, and the Austrade team proactively supports COLFUTURO, planning events to increase Australia’s market share of outbound students

availing of this education loan. The Australian embassy also organises education [events](#), inviting agents and local scholarship entities to meet with in-market representatives. These events include farewell events for students departing for Australia. 'Hot leads' from the Study Australia Experience are invited to attend.

Study Australia Experience has a LatAm presence on Instagram and Telegram, where the most recent ten messages were viewed an average of 421 times. Austrade also maintains a global presence on Facebook and Instagram 'Study Australia' profiles.

Social Network	Number of followers	Engagement
Study Australia Experience - LatAm		
<a href="#">Instagram</a>	10,800	118
<a href="#">Telegram</a>	1,174	-
Study Australia (Global)		
<a href="#">Instagram</a>	37,200	-
<a href="#">Facebook</a>	366,000	-

Social networks used by Study Australia Experience; number of followers; average level of engagement on ten posts.

## > United Kingdom

The United Kingdom is the twelfth preferred destination for Colombian students, according to [UNESCO](#) figures, and the UK receives 2% of of the country's internationally mobile third level students. Student numbers have been decreasing steadily since 2015 and the pandemic does not seem to have had any significant impact on student numbers. A reassuring growth of 16% was noted for the academic year 2021/22. More than three quarters (76%) of the Colombian students in UK universities in the 2020/21 academic years were pursuing postgraduate qualifications; while 41% of all higher education students from Colombian choose universities in London.

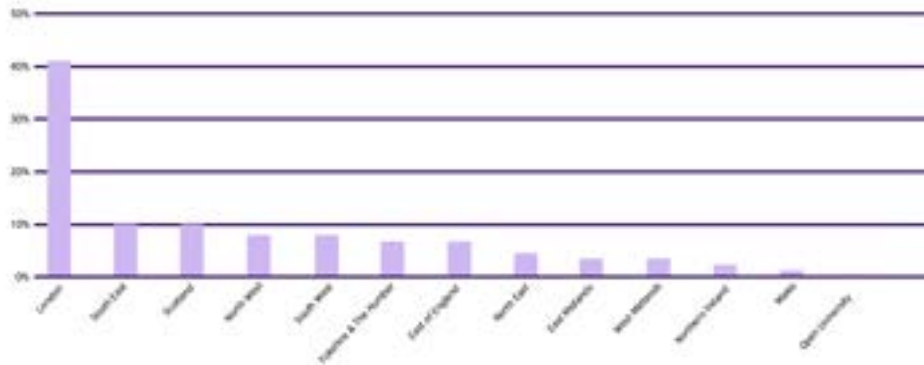
An [agreement](#) was reached in 2017 regarding the mutual recognition of degrees between Colombia and the United Kingdom, although it is not clear whether this agreement is currently in force.

Year	Number of Colombian students	Year-on-year change
2015	1,125	-
2016	1,085	-4%
2017	1,075	-1%
2018	1,020	-5%
2019	975	-4%
2020	920	-6%
2021	749	-19%
2022	870	16%

Colombian higher education students in the United Kingdom 2014 - 2020. Source: [HESA](#)

Postgraduate (research)	20%
Postgraduate (taught)	56%
First degree	22%
Other undergraduate	2%

Level of study: Colombian higher education students in the UK 2020/21. Source: [HESA](#)



UK region where Colombian higher education students were studying 2020/21. Source: [HESA](#)

Content on the British Council’s social media is predominantly focused on IELTS and other English language material and there is some audience traction on Instagram, while engagement on Facebook and Twitter is largely nonexistent (based on average engagement in ten posts). Despite having ninety-two thousand followers on Facebook, 30% of the most recent ten posts had zero engagement; the same lack of engagement was seen for 40% of posts on the British Council Colombia Twitter profile. Engagement was better on Instagram (average of 34 engagements on the last ten posts).

Social Network	Number of followers	Engagement
<b>British Council Colombia</b>		
<a href="#">Facebook</a>	92,000	2
<a href="#">Instagram</a>	18,700	34
<a href="#">Twitter</a>	9,734	2
<b>British Council (Global)</b>		
<a href="#">Facebook</a>	2,400,000	-
<a href="#">Instagram</a>	182,000	-
<b>StudyUK_britishcouncil (Global)</b>		
<a href="#">Instagram</a>	92,000	-
<b>Study UK - British Council</b>		
<a href="#">Facebook</a>	628,880	-

Social networks used by British Council Colombia; number of followers; average level of engagement on ten posts.

## Exclusive Survey

# Student Snapshot Colombia

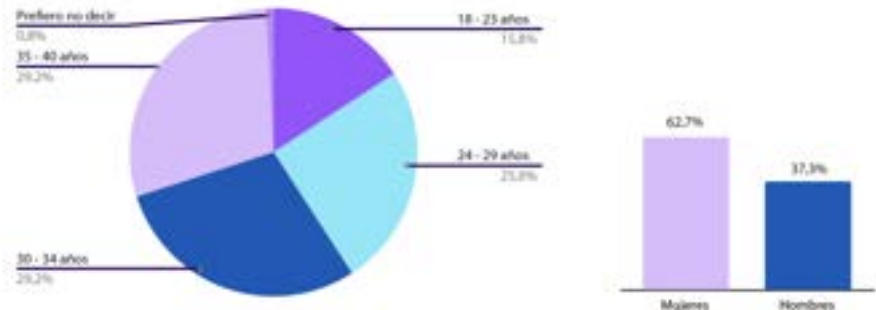
An exclusive survey was completed by 120 Colombians in January 2023 on behalf of the British Council. Survey respondents were aged from 18 - 40 years, with 16% aged 18 - 23 years, 25% aged 24 - 29 years, 30% aged 30 - 34 years, and 30% aged 35 - 40 years. Most (89%) answered the survey on a mobile phone or other handheld device, while the remainder responded on desktop computers, and 55% of the sample were male.

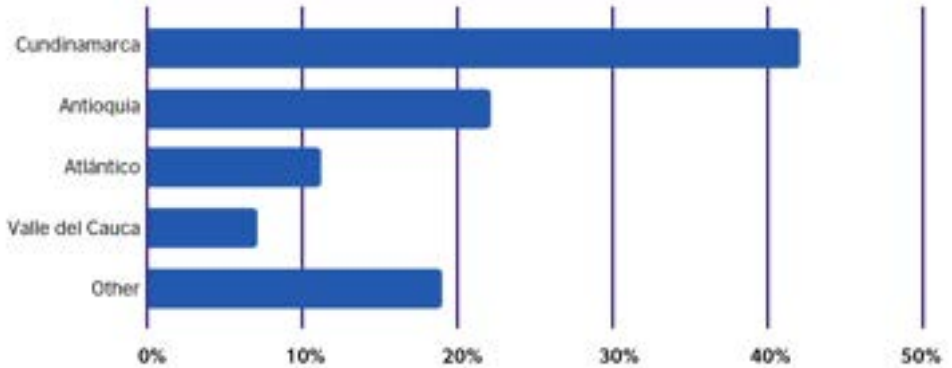
The number of people surveyed in Colombia was lower than in other countries as there was a limited pool available over a certain income limit. Income inequality is particularly acute in Colombia, and a system of 'estratos' divides people into social classes with allocation of public services depending on physical attributes of homes and neighbourhoods instead of earnings – although the current administration hopes to reform this system. For the purposes of this study, those with a family income of more than COP 4,500,001 per month, equivalent to around GBP £762, were

invited to participate. Given that families earning less than this may not consider overseas study, they were not represented in the survey to avoid negatively impacting the overall results.

Survey responses were received from 18 Colombian departments, with the majority (41%) in Cundinamarca, 22% in Antioquia, 11% in Atlántico, and 7% in Valle del Cauca. More than one third (34%) of respondents were located in capital city Bogotá, 14% were in Medellín, and 5% were in Barranquilla and Cali, respectively.

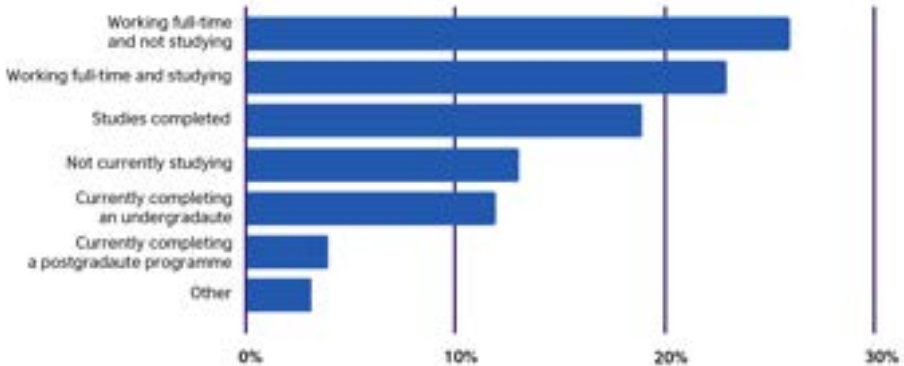
Email was the preferred method of information receipt cited by 38%; while 27% would like to receive study abroad information by post. One in five (19%) would like to receive information by WhatsApp. Only 7% wanted to receive information through events in their city, and just 2% cited webinars as their preferred information channel.





Department in Colombia where respondents are located. Source: British Council Colombia Survey by SOS Education Consultancy 2023

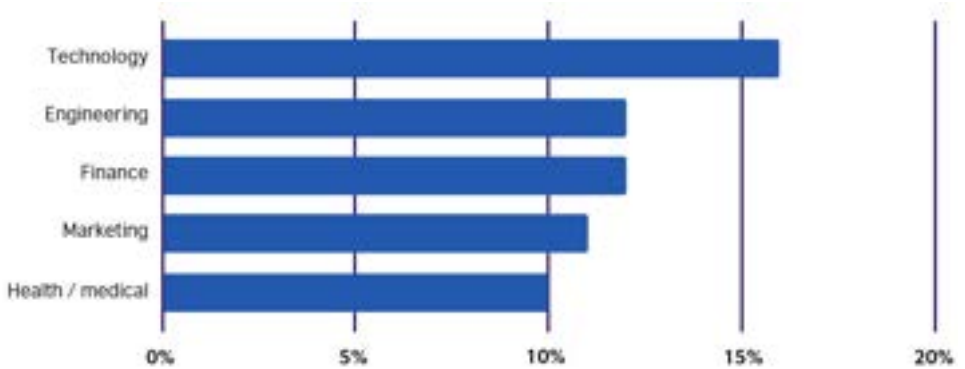
### > Current study status



Current study status of respondents to Colombia survey. Source: British Council Colombia Survey by SOS Education Consultancy 2023

More than a third (39%) of Colombians that responded to the survey are currently studying, with 32% of those pursuing undergraduate studies and 11% in the postgraduate phase. More than half of those currently studying (59%) are also working full time.

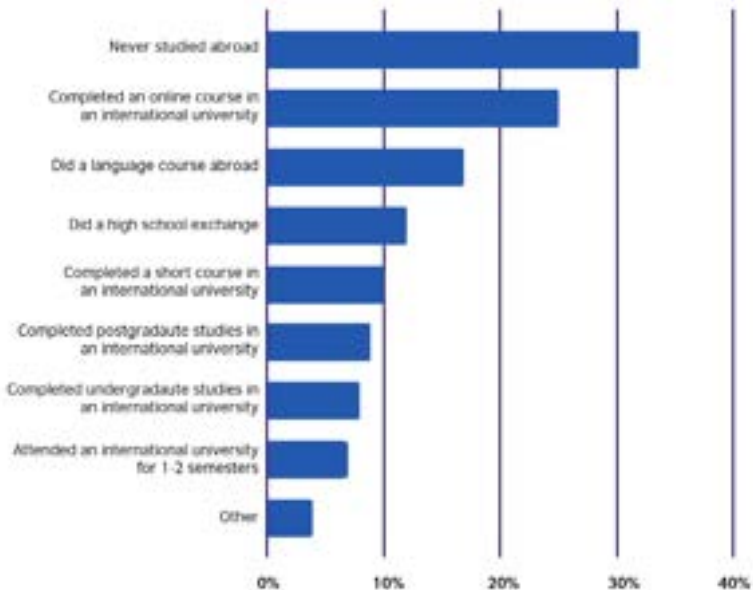
## > Future Career Aspirations



Which of these sectors best describes where you want to pursue your future career? Top five responses. Source: British Council Brazil Survey by SOS Education Consultancy 2023

Technology was the most popular future career area, chosen by 16% of survey respondents, followed by engineering and finance (12%, respectively), 11% see their future in marketing, while 10% wish to pursue a career in the area of health.

## > Have you ever studied abroad?



Have you ever studied abroad? (select up to three answers). Source: British Council Colombia Survey by SOS Education Consultancy 2023



One third (32%) of survey respondents never studied abroad, 12% completed a high school exchange programme, 17% completed an international language course, 8% completed their undergraduate studies overseas, 9% pursued international postgraduate studies, and 7% reported engagement in a 1-2 semester international exchange. One in ten (10%) completed a short course in an international university, while a quarter (25%) of respondents completed an online course in a foreign third level institution.

Almost one fifth (17%) of survey respondents completed an overseas language programme. Of those that completed a high school programme overseas: 13% completed an international undergraduate programme; 13% participated in a semester exchange programme; and 13% also reported completion

of international online programmes and of short programmes.

In the group that completed an international language programme, 9% completed undergraduate studies in an international university, with the same proportion having engaged in online studies at a foreign institution. Meanwhile, one fifth (20%) of those that completed their undergraduate programmes overseas had also completed an international language course. Those who studied at postgraduate level showed a higher likelihood of completing online courses in foreign universities, and 36% reported this to be the case. Those with international postgraduate experience represented 13% of those that had completed an online course at an international university.

## > Have you ever considered studying in a UK university?

I believe that study in the UK would greatly improve my career prospects	37%
I would like to complete studies online in a UK university	29%
I have heard great things about UK education	27%
It is my dream to study in the UK	22%
I could only go if I won a scholarship	21%
I would need to improve my English a lot	16%
I would study in the UK if there was a loan available that I could repay after graduating	12%
I have never thought about studying in the UK, but I would consider it	7%
It is my dream to study abroad, but I never considered the UK	7%
Study in the UK is too expensive for me	6%
I have never heard much about studying in the UK	7%
I would not like to travel so far from home	2%

Have you ever considered studying in a UK university? (select up to three responses)  
 Source: British Council Colombia Survey by SOS Education Consultancy 2023

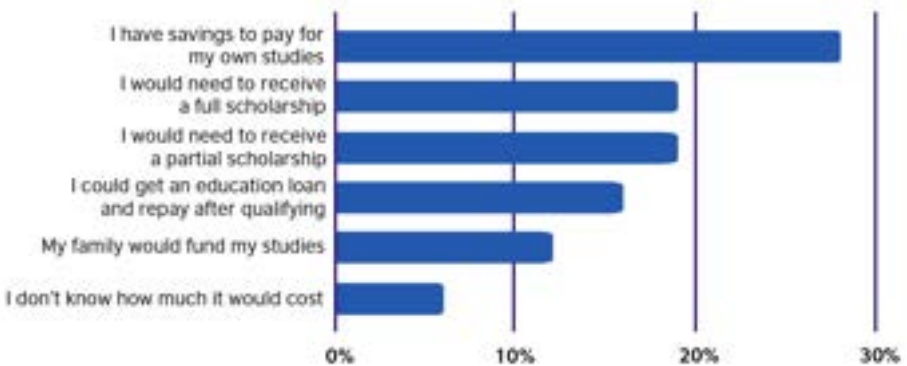
More than one third of Colombians (37%) believe that a UK education will improve their career prospects, and 36% of that subset also said they had heard great things about the British education system. One fifth of these (22%) said they would need to improve their English; 9% said they would need an education loan if they were to consider this option; and 16% said a scholarship would be needed. Interestingly, 40% of this subset indicated an interest in pursuing online studies in a UK university.

A desire to study online in a UK university was stated as a preference by 30% of survey respondents in Colombia, with half of those (51%) of the belief that UK study is a positive indicator for future careers, and 46% reporting

having heard positive things about the education system in Britain. One in ten (9%) of those interested in online studies acknowledge a need to improve their English.

Studying in the UK is the dream of 22% of respondents, with 42% of that subset reporting their belief that a UK education would benefit their career and a quarter (23%) saying they have heard great things about the British education system. A quarter (23%) of the same subset said they would need to improve their English first, 15% said they would need a loan in order to pursue this dream, while only 4% mentioned a need for a scholarship. One in five (19%) of these respondents said they were interested in online courses from a UK university.

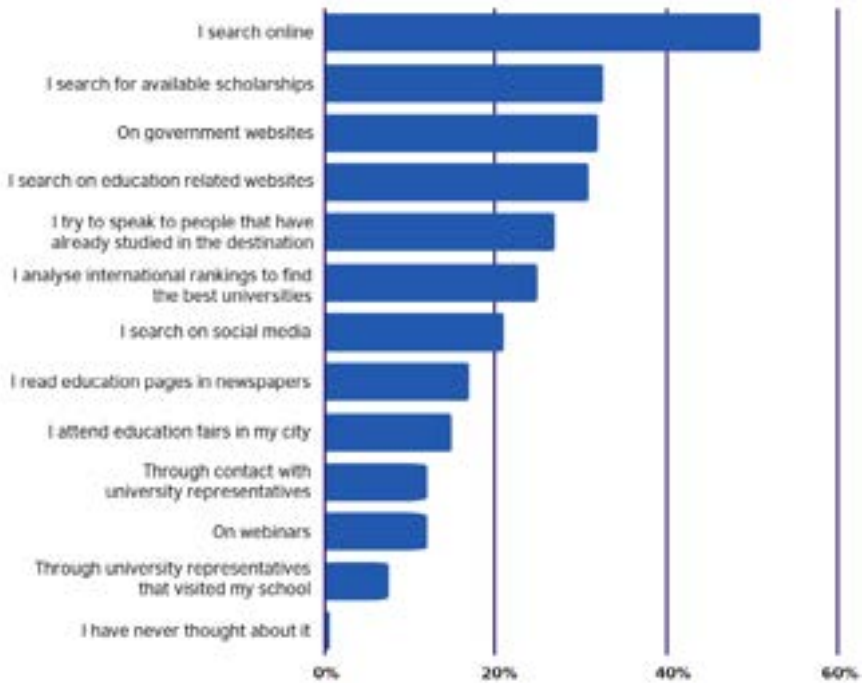
## > How would you fund your overseas studies?



If you were approved to study abroad, how would you fund your overseas studies? Source: British Council Colombia Survey by SOS Education Consultancy 2023

Four of ten (38%) respondents said they would need a scholarship in order to consider study in the UK; with half of these needing a full scholarship. Meanwhile, 16% said they would seek an education loan in order to do so. A further four in ten (40%) said UK studies could be paid for privately; with 71% of these respondents saying they had savings to pay for international studies, and the remainder (29%) stating that their family would cover the costs.

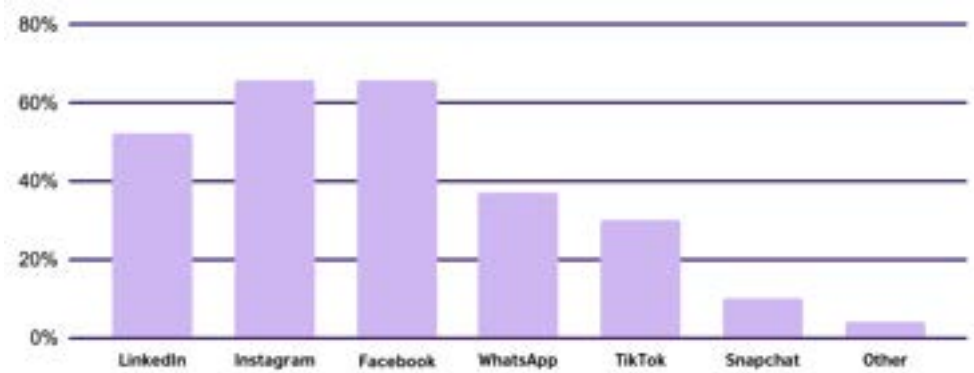
## > Best information source about overseas study?



Where would you look for information about overseas study? (choose top 5)  
 Source: British Council Colombia Survey by SOS Education Consultancy 2023

Online searches were considered the best place to find out more about international study options, cited by 51% in the Colombia sample; while 31% said they would search specifically on education related websites; and 32% thought government sites would be a good place to look. Meanwhile 17% would search in the education pages of newspapers. One third of Colombians (33%) would search for available scholarships when seeking information about international study; while 25% would analyse international rankings. Speaking to people that have already studied in the destination was a good way to inform oneself, according to 27% of respondents; searches on social media were cited by 21%; and 12% referred to webinars.

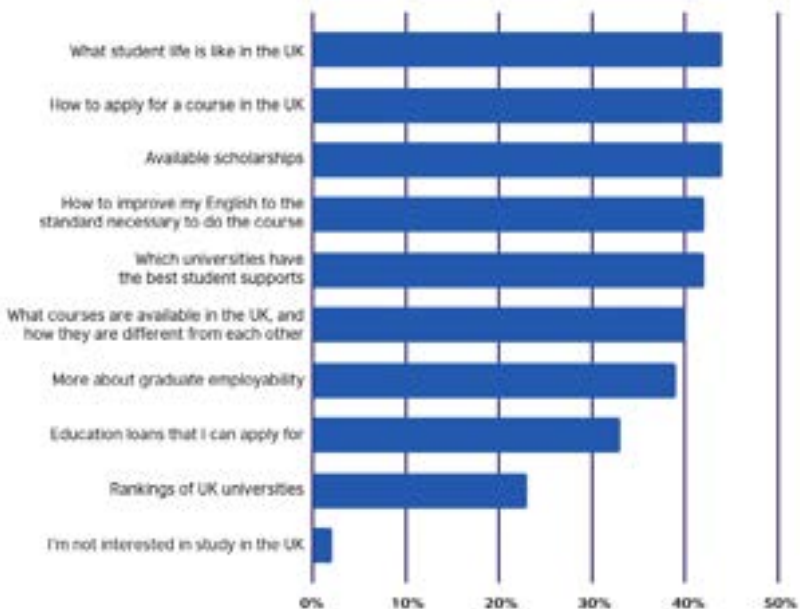
## > Best social media for study abroad?



What social media would you use to find out more about study opportunities?  
Source: British Council Colombia Survey by SOS Education Consultancy 2023

The best social media platforms for study abroad searches and information were Instagram and Facebook, cited by 66% respectively; while 51% mentioned LinkedIn as a good information source; followed by 37% that mentioned WhatsApp; and 30% for whom Tik Tok was seen as a good source.

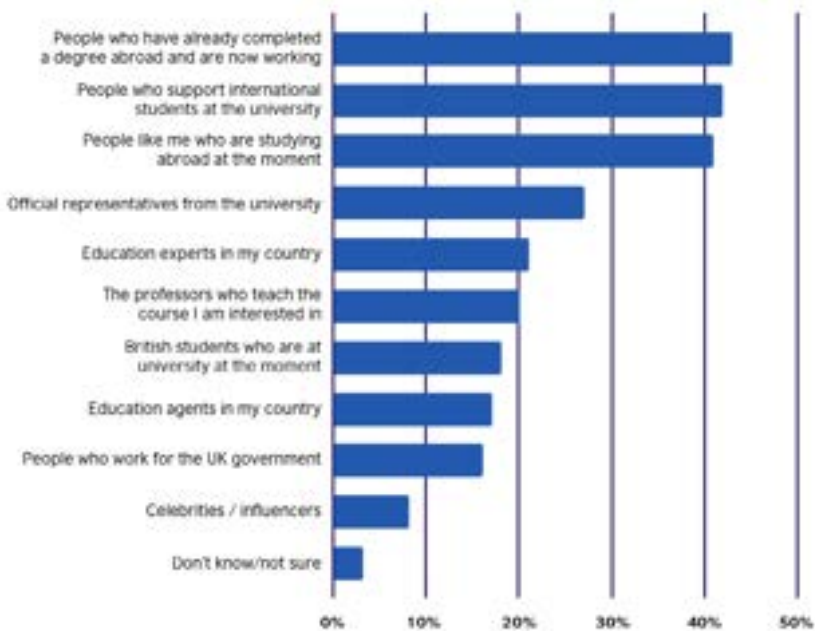
## > What do you want to know about study in the UK?



What would you like to learn more about study in the UK? (choose all that apply)  
Source: British Council Colombia Survey by SOS Education Consultancy 2023

Colombian students want to know more about student life in the UK; how to apply for a course; and what scholarships are available. These answers were cited by 44% of the sample, respectively. Meanwhile, 42% indicated a desire to know how to improve their English to the standard necessary for study in the UK; while the same proportion would like to know which university has the best student support services. More information about courses available in the UK and how they differ from one another was something desired by 40%; while 39% expressed an interest in knowing more about graduate employability. Further information about available education loans was cited by one third (33%) of respondents in Colombia.

### > Trustworthy information sources



If I look for information about studying abroad, I most like to hear from (choose 3)  
 Source: British Council Colombia Survey by SOS Education Consultancy 2023

Peers emerged as the preferred voice for Colombian students to understand study abroad options; and 43% would like to hear from graduate peers in the workplace; while 41% would like to hear from current students. International office support staff in foreign universities were of interest to 42% of respondents; while 27% want to hear from university representatives. Meanwhile, one in five (20%) would like to hear from academic staff in the universities; with a similar proportion (21%) wishing to hear from education experts; and 17% citing education agents in their country. People who work for the UK government would be a good information source for 16% of Colombians; while only 8% cited influencers or celebrities as preferred voices.

## Exclusive Survey

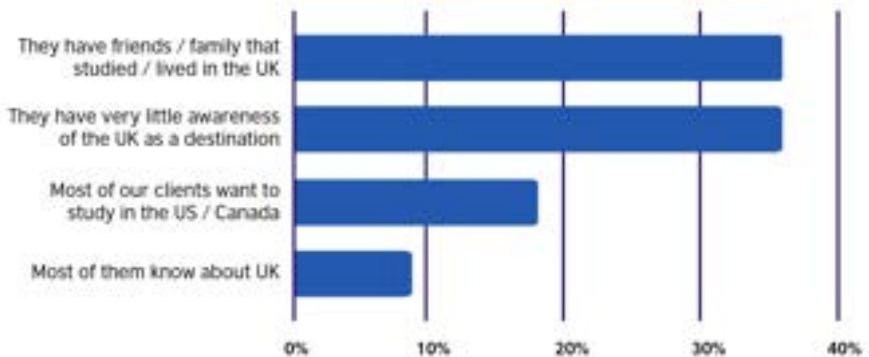
# Agent Snapshot Colombia

Eleven agencies in Colombia responded to a January 2023 that posed variety of questions relating to client perceptions of the UK as a study destination, and the preparedness of their staff teams to drive higher education sales to the UK. While many questions offered multiple choice replies, agents were invited to add their opinion when the responses offered did not match their opinions.

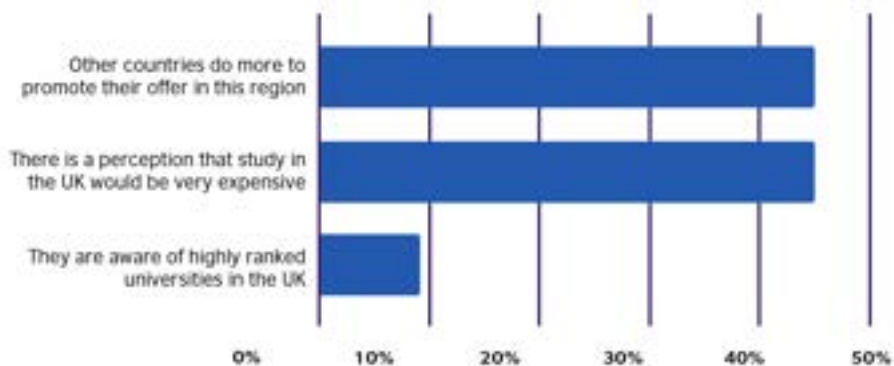
Of eleven Colombian agencies, four said demand has increased for the UK since the global pandemic, four reported fewer UK enquiries since then, while three said no real change was noted. All agencies indicated that email was the best way to send information to them.

Agents noted that their clients have a preference for study in the US or Canada (18%); or have very little awareness of the UK as a destination (36%); while 36% said their clients knowledge of the UK as a country is based on anecdotal information from family or friends that lived there. Nearly half of the agents (45%) said their clients see the UK as a very expensive study destination; while the same proportion said other countries were doing more than the UK to promote student destinations.

## > What do your clients know about the UK as a country?



## > What do your clients know about the UK as a study destination?

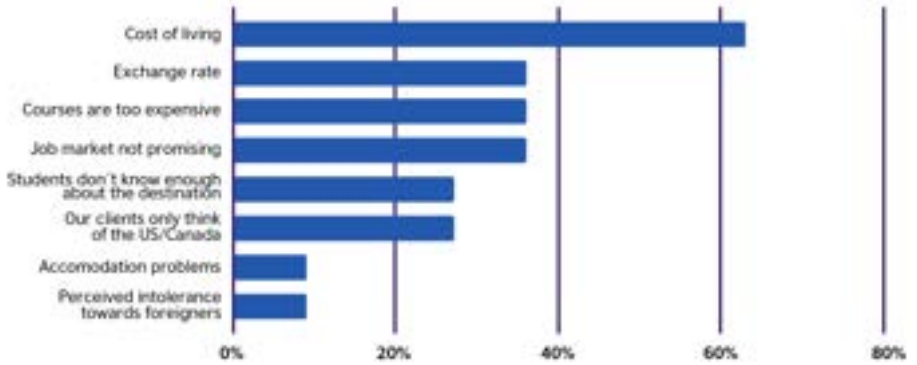


## > What motivates your clients in their choice of institution?

Reason	Proportion of agents citing reason
Opportunities to enter the workplace after their studies are complete	72%
Permission to work while studying	72%
Cost of living	54%
Cost of course	45%
Quality of teaching	36%
Exchange rate	27%
International rankings	27%
Tourism / cultural opportunities	18%
Security	18%
Cultural aspects	9%
Quality of life	9%
Proximity to other European Countries	9%
Salary expectations	9%
Family opinions	9%

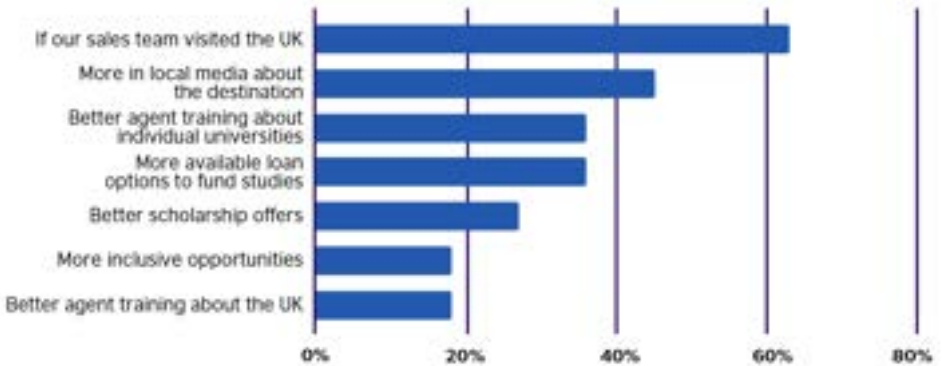
Post-study opportunities to enter the workplace and permission to work while studying were the most popular client motivators when choosing an institution, respectively cited by 72% of agents in Colombia; while cost of living and course prices were other main deciding factors.

## > What are the main challenges to third level study in the UK?



Cost of living was the main challenge to third level study in the UK, along with the exchange rate, and a sense that the jobs market is not very promising. Three agents expressed the view that students don't know enough about the UK; while others said their clients had other destinations in mind.

## > What might cause demand to increase?





## > What would help you to sell more UK higher education products?

Familiarisation trips to visit British universities	72%
More scholarships	45%
Regular in-person training sessions for our sales team	45%
Better training regarding the UK as a destination	36%
Key contacts in university representatives	36%
Clear salary scales / expectations for graduates	36%
Clear immigration information	27%
Strong alumni testimonials	27%
More information regarding inclusive opportunities / supports	27%
Identification of unique selling points for each university	18%
Part-time option to work while study	9%

Colombian agents want more training, both about the UK as a study destination and also about individual universities with whom they would like closer contact. Agents expressed a strong desire for members of their sales teams to visit the UK on a familiarisation trip, along with a wish to see more promotion of the UK in national media campaigns.

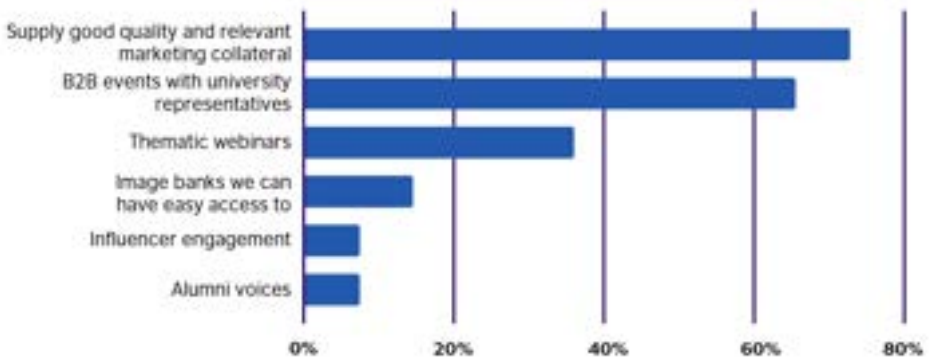
## > How do your university-bound students fund their studies?

Agent 1	Education Loan
Agent 2	Education Loan
Agent 3	Self-funded 70%; Education loan 30%
Agent 4	Self-funded
Agent 5	Education Loan

Agent 6	Mostly self-funded
Agent 7	Self-funded 70%
Agent 8	Self funded 70%; Education loans 20%; Partial scholarship 10%
Agent 9	Self-funded 50%; education loan 50%
Agent 10	Self-funded 60%

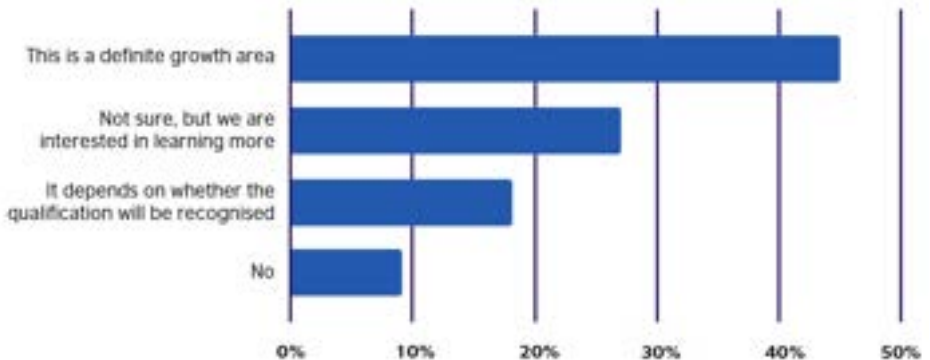
Asked how their university-bound students fund their international studies, agents were not clear on the exact breakdown for loans and scholarships, but it would appear that around 65% are self-funded. Agents listed COLFUTURO and ICETEX as funding sources for students, along with commercial banks Bancolombia, and Sufi. One agency (English Star) has a partnership with [Cooomeva](#) cooperative, offering a 5% discount on study abroad programmes.

## > How can the British Council support your agency to increase applications?



A vast majority (91%) of Colombian agents would like the British Council to supply good quality and relevant marketing material for their use when promoting the UK, 82% want to meet UK university representatives through B2B events, and 45% would like thematic webinars. Alumni voices were only cited by one agent as a response to this question, similarly influencer engagement was not seen as a necessary support, with only one agency citing this.

## > Do you see a market for an online offer from UK universities?



Nearly half of Colombian agents (45%) saw an online offer from UK universities as a definite growth area; with a further 45% interested to know more, and two agents saying this would depend on whether qualifications earned would be recognised in Colombia. None of the agents are currently offering such programmes, and just one agency did not see a market for an online offer from UK universities.

# Colombia analysis

Nearly 57 thousand Colombian third level students are internationally mobile, yet the UK only commands a 2% share of this market. While many Colombian students may opt for Argentina and Spain as top destinations, due to the fact that they can learn in Spanish (and they can often study for free in public institutions in Argentina), it is important to understand why Britain is just the 12th preference for Colombian students.

In a November 2022 study for the British Council, 90% of Colombian education agents said Canada was in their top five destinations for higher education; while 26% mentioned the UK in the top five. In fact, nearly half (47%) of the agencies only named Canada when asked for their top destinations. The facility for permanent residence in Canada is a clear pull for students in Colombia, and public awareness of this opportunity means the business model for many agents is a sole focus on Canada.

Many Colombian agents reported that they have no direct contact with UK universities, while several work with platforms like ApplyBoard and Adventus and through groups like INTO, Study Group. The vast majority of agents in Colombia (89%) in November 2022 said they would like to work with more university partners in the UK.

The presence of EducationUSA advisors in eleven student support centres around Colombia (mostly in Colombo American centres) gives the United States a clear geographical advantage, and gives the destination unfettered access to Colombian students. Student numbers to the US were largely undented by the global pandemic.

Australia saw an impressive post-pandemic recovery in student numbers from Colombia in 2022, and while it is not a proven result of the launch of the '[Study Australia Experience](#)'

platform with Spanish content, the engagement documented following a regional communications campaign shows the destination earned great visibility during 2022.

Australia does very well with recruitment to the VET sector (53% of students recruited from Colombia) with long term residency opportunities for those with certain qualifications that meet [skills shortages](#) and satisfy [points-based testing](#) among other conditions.

Colombian higher education students in Australia show a preference for business and management programmes, also the top field of study for Colombians considering study in the [US](#). While finance was one of the top areas identified by students in this January 2023 study for the British Council, it is interesting to note that a career in the area of technology was the most cited preference. This may reflect the current skills deficit in IT areas, and media reports regarding the creation of hundreds of thousands of IT jobs, as well as US tech firms employing remote workers, allowing Colombians to earn US salaries without leaving home.

The most popular fields of study chosen by Colombians with funding from COLFUTURO from 2017 - 2022 were engineering (21%), administration and business (12%), social sciences (11%), law (8%), and architecture and design (7%). A total of 8,233 Colombian students were funded in this five year period, nearly half (47%) of whom were from Bogotá / Distrito Capital, 13% were from Antioquia, 5% from Santander and Atlántico, respectively, while 4% came from Valle del Cauca.

Cost of living was cited by agents as the main challenge to third level study in the UK. They said courses are too expensive and that the UK jobs market is not promising. Exchange rates

were also seen as a barrier. However, cost did not come across as a prime factor when Colombians consider study in the UK, and while one fifth of survey respondents said they would need a scholarship to study in Britain, the main feedback was around high standards of the UK education system and an idea that study in the UK would greatly improve job prospects. In fact, only 6% said they thought study in the UK was too expensive.

It is important that stakeholders realise that there are other study destinations in the UK apart from London, which tends to be the most popular city for mobile Colombians. Of 1,706 students that were funded to go to the United Kingdom with COLFUTURO from 2017 - 2022, 54% went to London, and 41% of Colombians in the UK for higher education in 2020/21 were based in the British capital city.

This begs the question about how much awareness there is among agents and their prospective clients regarding costs and benefits to study in the UK. Agents reflected that many of their clients have very little awareness of the UK as a destination, while many felt that other countries do more to promote their education offer in the market. Agents said Colombian students have the United States and Canada as a primary reference when it comes to international third level studies.

However, the fact that Britain is the second most popular destination for education loans supported by COLFUTURO suggesting there is some awareness of the UK. Nearly 300 (296) Colombian students were awarded funding in 2022 to study in the UK, while 311 were funded to study in the US. Only 86 students received loans from the non-profit to study in Canada in 2022; while 113 used this funding for studies in Australia.

Two of five Colombians contacted for this study would like to know more about courses available in UK universities, while 29% would like to complete an online programme in a UK university (25% have already completed online

programmes in international universities). Nearly half of the agents (45%) said online courses were a definite growth area; while a further 45% wanted to know more about this possibility, including confirmation regarding recognition of international online qualifications in Colombia.

Often, and particularly in the area of IT, formal qualifications are valued less by companies than practical training and know-how. It may be worth investigating whether companies in Colombia would value an offer of short-term online

programmes that address specific skills deficits. The competition should be reviewed in order to compare to the UK offer, in terms of content, price point, and return on investment.

There is a disconnect between some Colombian agents and the British Council, and a belief (whether based on fact or not) that the British Council worked in direct competition with agents some years ago. It was reported during this study that the British Council was directly promoting schools and other institutions in a commission based model (in 2009 / 2010). While this may not be what actually happened, it points to a need for recovered relations between the UK governmental entity and the Colombian agent sector.

Agents want to sell, and it is important that they fully know the product, particularly in the case of higher education, which is not only a major financial outlay, but also a grand leap of faith in the case of parents sending their teenage children overseas. It is reasonable to presume that an agent who does not fully know a destination will not try very hard to sell it - they will sell the one they know best. Making sure agents know all about the destination is just half the battle; the UK must also create demand by ensuring prospective students know what Britain has to offer.

Colombians want to know more about student life in the UK, how to apply for a course, what scholarships are available, how to improve

their English to the standard necessary to study in a UK university, what student supports are available in the UK, what courses are available, and more about graduate employability. They seek practical information and this warrants a communications plan that addresses each step in the search and application process, with content created to address curiosities and doubts.

When students search online for information about study abroad, what questions do they type into search boxes? What keywords are they using, and what are the top results? These questions warrant consideration, so that relevant information from official sources reaches the top of search results.

Colombians said they search on government sites and education related websites – is the information up to date? Is it confusing?

Key #StudyUK messaging should be identified and communicated to the market through a variety of channels. While Colombians referred to both Instagram and Facebook as equally important social media sites for information on study abroad, analysis of activity shows that Instagram is better for student engagement. Even with hundreds of thousands of followers, a lot of social messaging is falling into a virtual void, and is a waste of time and resources.

Government agency ICETEX supports access to higher education to students from disadvantaged backgrounds through partially forgivable education loans. There are 10,000 applicants to a typical ICETEX call (20% applicant success rate) - a great visibility opportunity for UK universities. To partner with ICETEX, UK universities need to offer a 50% fee discount (there are currently no UK partners). It may be worth offering a limited number of places within such partnerships, either

with the UK university offering the discount, or with governmental support to do so.

FPP and BMI are the main students recruitment fair organisers in Latin America, and 822 Colombian students attended a FPP online event in September 2022, with 48% stating an interest in undergraduate programmes, 21% seeking international postgraduate opportunities, and 21% that wanted to study a language programme overseas. Students were asked to state their preferred destination country (they could select more than one), and 41% said they were interested in study in the UK (73% said Canada, 63% said the United States, while 59% mentioned Spain as a preferred study destination).

Eighteen UK universities participated in BMI fairs in Colombia in 2022, alongside seventeen from Canada, nineteen from Australia, and thirty-six from the United States. FPP's virtual fairs were less popular with the British, and only one participated alongside nine from Australia, sixteen from the US, and twenty-three from Canada.

# Recommendations

## > UK engagement

- To make future plans for Colombia, it is good to have an idea of current market engagement. Assessment is recommended to understand which UK universities are already working with the Colombian market. Do they have an in-market representative? What are the main challenges they face in Colombia?
- In-person events should be arranged to support those with an existing presence in the market, for example, offering British Council meeting rooms for agent training sessions in key cities. Universities that do not have a presence in the market should be encouraged to seek representation (even if it is a representative that covers several markets in the region), or arrange to visit regularly to cement important partnerships.

## > Brand building

- The British Council should develop the #StudyUK brand in Colombia, to create distinction between the student recruitment arm of operations and other initiatives.
- Create a Spanish language '[Study UK](#)' platform, and launch through a national (or regional) communications campaign that includes a clear call to action, whether this is signing up for a series of webinars, or to receive regular scholarship bulletins.

## > Agent relationships

- Develop closer links with ANEX, the Colombian association of education agencies. While there is validity in aligning with individual agencies, there is a clear advantage to working with a group of agencies that have all signed to a shared ethical code. Working with ANEX will facilitate contact with at least 26 agencies, and it is recommended that the association be involved in planning some agent events.
- Organise B2B events so agents can become better acquainted with each UK university representative, understand the university's unique selling points, and have a clear contact point in each university to quickly respond to queries.
- Arrange a familiarisation trip to specific regions in the UK for key agents that show a clear and demonstrable interest in selling higher education in the UK. Dilute the London focus by bringing them to other and cheaper parts of the UK. Focus on the physical infrastructure and support structures of the universities they visit - show them where their clients will study, eat, shop, dance, sleep. Avoid death by powerpoint on such trips by giving them a pendrive, or by presenting online before or after the trip.

## > EdTech Platforms

- Some liaison with entities with ApplyBoard and Adventus is recommended, as both already have partnerships with dozens of agencies in Colombia (ApplyBoard works with 88 Colombian agencies, while Adventus has a portfolio of 56 agents in the market). Ensure the UK content on these platforms is consistent with overall brand messaging, and investigate partnership opportunities, like event sponsorship.

## > School networks

- Build a network of private schools in Colombia, to include international and IB schools, and ensure counsellors have completed available training.
- Both BMI and FPP offer high school counsellor events, and participation can be a good way to start building these important networks. Sponsorship of such events can ensure that key messaging is delivered to stakeholders from the best schools in Colombia.
- Offer workshops to high school counsellors, not only on the UK as a study destination, but also on general career guidance best practice.
- Invite a key group of high school counsellors to visit a select group of UK universities.
- Investigate the possibility of offering junior university taster programmes to, in partnership with agents. These are a great opportunity to showcase university infrastructure and specific courses areas, or capacities. Focus on soft skills development within any programme offered and include a mix of cultural activities.

## > Funding agencies

- Align with scholarship and loans entities, and ensure that UK universities fully understand the potential exposure that liaison will offer to the Colombian student market. Arrange information events for Colombian students around dates that specific calls are launched, or at key points in the academic calendar.
- The British Council should engage with commercial banks Bancolombia and Sufi as well as the Coomeva cooperative to see if any alignment may be beneficial.

## > Student recruitment

- Study UK' brand participation in existing student recruitment events (BMI, FPP), or boutique Study UK events for the Colombian market, in key cities. As well as exposing select student audiences to the benefits of studying in the UK, this will allow the British Council and UK universities to build strong contact lists for future well-planned marketing campaigns by email, with 38% of students stating that this is their preferred way to receive information.

## > Online offer

- Investigate the current offer of online programmes from UK universities, whether qualification will be recognised in Colombia, and whether formal British qualifications are needed. Do employers prefer short on-point courses?
- Investigate the potential to liaise directly with the Colombian Chamber of Informatics and Telecommunications to offer programmes to member companies to meet skills deficits.

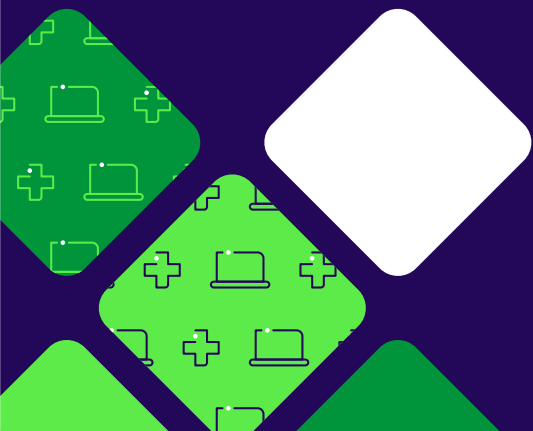
## > Communications strategy

- Review social media activity and engagement in Colombia, and develop material that directly aligns with what students are looking for, to include a focus on specific careers areas, and UK courses that lead to such professional profiles.
- Develop overall destination messaging for #StudyUK and build marketing collateral around this, ensuring that agents have easy access to high quality image banks that impart key messaging.
- Create regular Spanish language content, preferably with Colombian students or graduates, to tell personal stories about practical aspects of student life in the UK. Content need not be limited to academic or formal processes, and can take the form of friendly advice, or firsthand reports of positive or unusual experiences - 'Tips to save money while studying in the UK', 'Five things I wish I knew before I went to the UK', etc. Such blog content can be hosted on the Study UK site (thereby helping search engine optimisation with certain embedded key words), and posted on social media.
- Identify key education publications in Colombia and create interesting content on topics that are not directly related to recruitment, but discussing future trends that are of interest locally. Offer interviews with key education personnel from UK universities or from the UK government.



# Mexico

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# Mexico

Population	126 million
GDP 2021	USD \$1.4 billion
Unemployment	2.8% (November 2022)

## Main recommendations:

- High level engagement with the National Council for Standardisation and Certification of Labour Competencies to benchmark certain areas with identified skills deficits;
- Launch Spanish language Study UK platform, with events in Mexico City, Monterrey, Guadalajara & Juárez;
- National brand #StudyUK presence at student recruitment events;
- Align with AMTE, the Mexican association of education agents;
- Greater engagement with funding agencies and communications strategy around significant dates.

## Market Overview

Mexico is the second most populous nation in Latin America, with a GDP of US\$1.4 billion making it the second largest economy in the region and placing Mexico in the world's top 15 economies. However, the [World Bank](#) said Mexico underperformed over the last three decades in terms of growth, inclusion, and poverty reduction compared to similar countries, and IMF [data](#) shows that real GDP growth has been relatively stagnant since 1980. Mexico has returned to a reasonable [4.8%](#) GDP growth since the pandemic; however, just 2.1% growth is predicted for 2023. A recent sharp rise in [remittances](#) from the United States suggests that many Mexicans are struggling financially despite the recovery.

Inflation rates in Mexico are currently at [8%](#), although this is not new in a country that has never enjoyed low inflation (rates reached 132% in the late 1980s). Food prices [drove](#) inflation in 2022 (14.25% in October 2022). Crude oil production, once an essential part of the economy, fell significantly, while the OECD [estimates](#) that growing goods and services sectors now account for more than 40% of GDP.

Despite a long history of social problems (e.g. cartel related violence), Mexico has developed a strong start-up ecosystem, with growth incentives offered by the government. Tech hubs tend to concentrate in Mexico City, one of the biggest cities in the world (population of

21 million people), and in Monterrey and Guadalajara. Mexico’s global location makes it a prime location for multinationals and it became the first country in Latin America to [regulate](#) the fintech sector in 2017.

### > Political Scenario

Mexico is a federation, and powers and responsibilities are divided between federal, state, and municipal governments. President Andrés Manuel López Obrador took office in December 2018. Since then, the scope of the military has [expanded](#) to include law enforcement, social programs, building projects as well as border control, as Mexico remains a common route for Central Americans seeking to make their way to the United States.

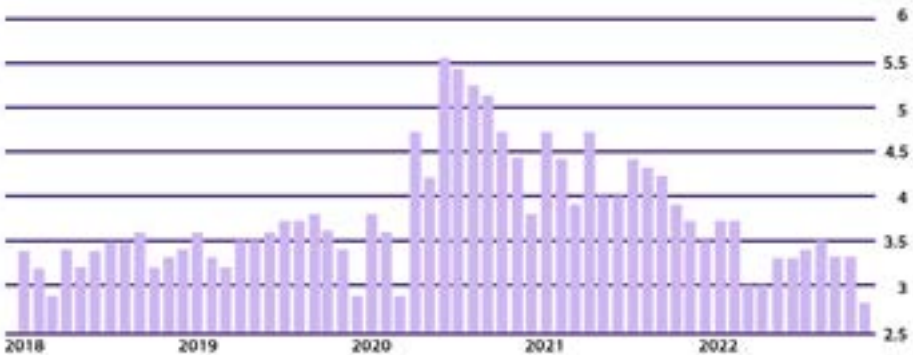
President López Obrador has come under scrutiny for his tough stance on law and order, and a proposed ‘jail, no bail’ policy which would see mandatory pre-trial detention for people accused of fraud, smuggling, or tax evasion (the policy was struck down by the Supreme Court). Midterm elections in 2021 were marked by a [wave](#) of politically motivated violence, during which more than one hundred officials and candidates were killed. A [2020](#)

[report](#) from the Institute of Economics & Peace names Mexico one of the most dangerous places in the world to be a local politician.

Strengthening Mexico from within is a government focus, and much funding that was historically set aside to fund international postgraduate studies through National Science Foundation CONACYT has been redirected towards local public universities and in-country scholarships.

### > Unemployment

The unemployment rate rose from 3.5% to [4.4%](#) from 2019 to 2020, a relatively modest increase in the context of the COVID-19 pandemic, and was down to 2.8% by November 2022. Unemployment for those with an advanced education was above the national average in 2021 ([5%](#)), pointing to a lack of well paid jobs. Mexico has a high rate of informal employment, meaning workers do not have access to the benefits and higher salaries of formal employment. An [IMF report \(2019\)](#) said more than 56% of the labour force occupy informal roles, while an OECD [report](#) from the same year blamed this for Mexico’s considerable income gaps.



Tasa de desempleo en México 2018 - 2022. Fuente: [TradingEconomics.com](#)

## > Skills Shortages

More than one quarter (26%) of Mexican workers are 'over-educated', according to an OECD report (2017), while 31% are 'under-educated'. The report suggested that up to 40% of employed tertiary graduates work in an occupation unrelated to their field of study.

Meanwhile, talent shortages sat at 65% in 2022, according to [Manpower Group](#), an improvement from 75% the previous year, but still 13% higher than pre-pandemic records. The most acute talent shortages are in wholesale and retail trade, IT and technology, manufacturing, while the most in demand-roles were customer facing and front office, operations and logistics, sales and marketing, and administration and office support.

the labour force occupy informal roles, while an OECD report from the same year blamed this for Mexico's considerable income gaps.

A 2018 [study](#) by the University of Zacatecas suggested that 1.4 million Mexicans with postgraduate degrees had left the country in 25 years (1990 - 2015) due to a lack of professional development opportunities. [Caintra](#), an industrial network in Nuevo León, created a 'Business Alliance for Technical Education', encouraging companies to promote technical education and strengthen the employability of young people in the state. Four hundred young people have benefited from financial support for school fees and training in personal and professional development issues, including socio-emotional skills. The alliance recently introduced a 'Women in Technical Education' programme welcoming 15 young Mexican women.

Wholesale & Retail	69%
IT & Technology	68%
Manufacturing	66%
Banking & Finance	65%
Construction	65%
Education, Health & Government	63%
Restaurants & Hotels	58%

Mexico's 2022 talent shortage across industries. Source: [ManpowerGroup](#)

Top 5 in-demand roles		Top 5 soft skills	
1	Customer Facing & Front Office	1	Reliability & Self-Discipline
2	Operations & Logistics	2	Resilience & Adaptability
3	Sales & Marketing	3	Collaboration & Teamwork
4	Administration & Office Support	4	Reasoning & Problem Solving
5	Information Technology	5	Leadership & Social Influence Skills

Top 5 in-demand roles and top 5 in-demand soft skills in Mexico 2022. Source: [ManpowerGroup](#)

There are nearly 300 mining companies operational in Mexico, many with foreign capital, and in [2019](#) Austrade suggested a market need for short-cycle programmes to accelerate skills development in the sector, noting a high demand for soft skills and English proficiency. The following areas were identified among mining clusters as needing skills development: mining safety, sustainability (environment and community relations), productivity, competitiveness, and soft skills. CONACYT, the National Science Foundation, published a [report](#) in 2018 that identified sectoral skills needs including: IT, environmental management, extraction techniques, electronics, health and safety, metallurgy, and electromechanics.

There is also a significant skills gap in Mexican tourism, which accounts for 77% of the services sector. An Austrade [survey](#) revealed that 60% of hotel chains had difficulty filling roles, largely because candidates did not have necessary soft skills or English proficiency. High demand skills include: teamwork, decision making, communication and

managerial skills. Most hotels had online training platforms, and invested between USD \$56 - \$200 per staff member per year on training. Those without such platforms engaged with Mexican universities to train junior staff, and with international providers to upskill senior executives.

A 2018 OECD [report](#) identified several skills and knowledge deficits in Mexico. Among the listed skills that need improvement are: management of financial resources, systems evaluation and analysis, management of material resources, judgement and decision making, and negotiation, while knowledge areas indicated include: sales and marketing, computers and electronics, education and training, economics and accounting, sociology and anthropology, and telecommunications.

## > Education

	School / Level	Grades	Age	Years
Primary	Educación Preescolar Educación Básica	-	3 - 5	3
	Escuela Primaria Educación Básica	1 - 6	6 - 11	6
Middle	Secundaria Educación Básica	7 - 9	12 - 14	3
Secondary	Preparatoria, Educación media superior	10 - 12	15 - 17	3
Tertiary	Técnico Superior Licenciatura	-	-	4
	Maestría Especialidad	-	-	2
	Doctorado	-	-	2

Education system in Mexico. Source: [Scholaro.com](#)

Primary education has been compulsory in Mexico since 2009 for children aged 6-12 years and is offered free-of-charge through the Secretariat of Public Education (SEP) after one year of mandatory preschool education. Curricula for public and private schools are standardised by SEP to include Spanish, maths, natural sciences, history, geography, art, and physical education. The subsequent three year *secundaria* cycle is also compulsory, and students choose an academic or a technical route (with a focus on vocation, commercial or artistic training). Those on the academic track tend to continue to upper secondary level, with many schools affiliated with local universities. Learning a foreign language is compulsory for those on the academic track at this level. It is [estimated](#) that approximately 18% of high school students in Mexico are in private schools, with higher proportional private schooling in cities Aguascalientes, Guanajuato, Hidalgo, San Luis Potosi, Tamaulipas and Yucatan (although this is based on 2008 data).

There were [892,836](#) students enrolled in Mexican universities in 2021/22 according to ANUIES, the National Association of University Institutions of Higher Education. Yet, only [27%](#) of Mexicans aged 25-34 had a tertiary qualification in 2021. While well shy of the OECD average of 47%, this is a marked improvement on levels in 2000, when only 17% of Mexicans in that age group had third level education. Although women are slightly more likely to have a tertiary qualification than their male peers, they are less likely to study in the fields of science, technology, and engineering - areas that would likely promise higher salaries after graduation. Female third level graduates earn 25% less than their male counterparts.

Mexican students are more likely to study business, administration, and law subjects than other areas, and represent 35% of third level graduates in the country. This is according to OECD [\\_](#), which shows that 13%

study in the field of arts and humanities, social sciences, and journalism, while only 3% opt for courses in the the field of natural sciences, maths, and statistics. Compared to other countries of similar size, Mexico has very few prestigious universities, and the market demand for quality higher education is underserved.

University entrance is extremely competitive, and there is an undersupply of third level places, with hundreds often applying for the same place. The net result is a sizable cohort of young middle-class students seeking international study options. The United States has traditionally enjoyed a privileged position to accommodate this demand, but enrolments have fallen in recent years, possibly due to cross-border tensions. Heavily targeted campaigns around the time of university entrance examinations and their results to target these students may offer extra market opportunities for UK universities.

## > English Proficiency

Despite close proximity to the world's largest English-speaking country, Mexico does not have high proficiency rates in the language. The [Education First English Proficiency Index](#) (EF EPI) ranks Mexico at 88 out of 111 countries (19 of 20 in Latin America – only Haiti scored lower), deemed to have 'Very Low' proficiency. Some regions and cities, however, scored above the global average and are considered to have 'Moderate' proficiency. Proficiency was lowest among the 18-20 age cohort in Mexico (average score of 381), while the 26-30 age group was just marginally better than other age groups. No age group in Mexico reaches the global average for proficiency.

The EF EPI is not a perfect measure of proficiency, and EF itself points out sampling biases – only those that have an intention to learn English tend to sit the proficiency test –

so wider societal fluency is not evaluated. However, as one of the largest annual global studies (2.1 million people were tested in 2022), analysing proficiency against GDP,

income per capita and socioeconomic factors to identify trends, the index can be viewed as a useful benchmarking tool.

City	EF Proficiency Score	EF Proficiency Level
Guadalajara	546	Moderate
Querétaro	528	
Monterrey	520	
León	518	
Hermosillo	511	
Aguascalientes	507	
Ciudad de México	507	

Mexican cities with 'Moderate' English language proficiency according to EF. Source: [EF 2022](#)

While a [National English Programme](#) implemented in 2009 achieved targets, according to government statistics, better results could be attained. British Council data ([2015](#)) pointed to an English language learning market of almost 24 million, or around 21% of the population, while more than half (51%) of employers surveyed said they provided English language training to their employees. Most did so in partnership with private external companies. The report suggested that Mexico would need around 80,000 additional teachers to meet objectives around English proficiency.

### > Internet Penetration

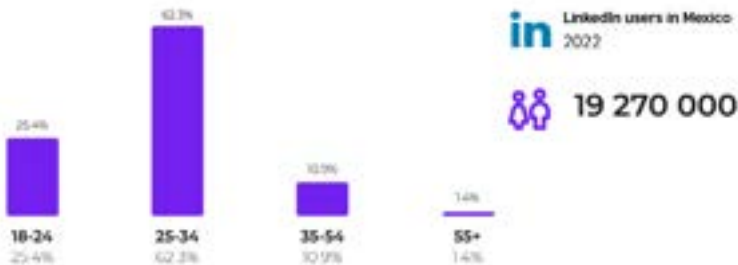
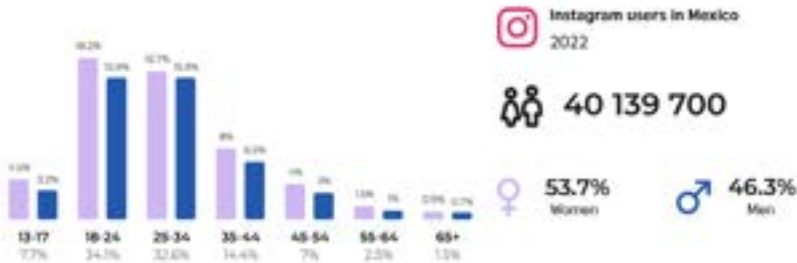
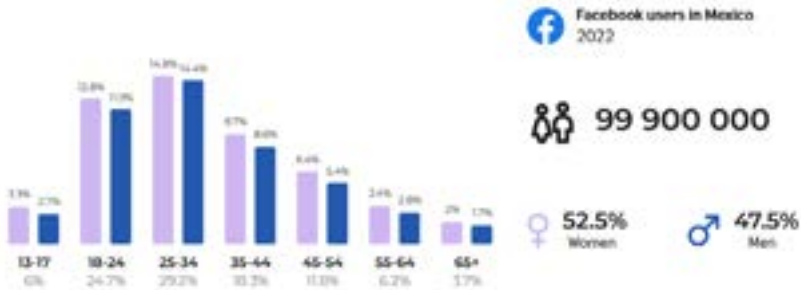
Full national access to the internet is a stated objective of the current government, yet the Federal Institute of Telecommunications estimates that only around [65%](#) of the population are currently online. A governmental contract was awarded to Altan Redes in 2016 with the objective of raising mobile internet coverage above [92%](#) by January 2024 (subsequently extended to 2028). However, the company filed for bankruptcy in 2021 and the government became a majority stakeholder with the bailout.

## > Social Media Use

Mexicans spent, according to the [Federal Institute of Telecommunications](#), 8-10 hours per day on social media in 2020 – up from 6-8 hours per day five years previously. Some politicians have called for greater regulation of social media platforms, with one proposal suggesting that platforms with more than a million subscribers (e.g. Facebook, Twitter, Instagram etc.) should need approval from the Federal Institute of Telecommunications before operating in the country.

Social Network	Mexican Users
Facebook	99,900,000
Instagram	40,139,700
LinkedIn	19,270,000

Number of Mexican users of social networks in December 2022.  
Source: [NapoleanCat.com](#)





# Student Mobility

The United States is the destination of choice for nearly 42% Mexicans studying abroad, according to UNESCO data. It's a logical option due to geographical proximity, but also boosted by US initiatives like the 2013 '100,000 Strong Americans' program, which sought to

double the number of exchange students in the Americas by 2020. A Mexican programme, 'Proyecta 100,000' aimed to send 100,000 students to US universities and by 2014 had 27,000 Mexicans participating.



Global Flow of Tertiary-Level Students from Mexico. Source: [UNESCO](#)

#	Destination Country	Number of Mobile Third Level Students	Percentage of all Mobile Third Level Students
1	United States	14,475	42%
2	Spain	3,511	10%
3	Germany	3,447	10%
4	Canada	2,760	8%
5	France	2,258	6%
6	United Kingdom	1,868	5%
7	Argentina	879	3%
8	Australia	872	3%
9	Colombia	424	1%
10	Italy	393	1%
<b>Sum of Top 10</b>		<b>19,975</b>	<b>58%</b>
<b>English Speaking in Top 10</b>		<b>34,781</b>	<b>100%</b>
<b>Overall Total</b>		<b>56,910</b>	<b>100%</b>

Top ten countries receiving third level students from Mexico. Source: [UNESCO](#)

# Looking to the Competition

## > United States

Mexico is the ninth biggest source market for international students in the United States, and the US Department of Trade notes an increased demand for graduate programmes. Interestingly, Mexico is the sixth largest source market for community colleges in the US, reflecting student interest in more affordable options than traditional universities. In 2019,

the student market from Mexico to the US was worth [USD \\$524 million](#). More than half of Mexican students in the US (56%) pursue undergraduate programmes; 29% are postgraduate students; 3% pursue non-degree courses; while 12% are completing OPT (Optional Practical Training).

Academic Level	Number of students	% of Mexican students	% change (2020 to 2021)
Undergraduate	7,303	56%	-9%
Graduate	3,788	29%	-0.8%
Non-Degree	358	3%	56%
OPT	1,537	12%	-11%
Total	12,986	100%	-

Mexican students in the US by academic level (2021), and percentage change from 2020 to 2021. Source: [US Department of Trade](#)

Year	Number of Mexican students	Year-on-year change
2015	17,052	-
2016	16,733	-2%
2017	16,835	0.6%
2018	15,468	-8%
2019	15,229	-2%
2020	14,348	-6%
2021	12,986	-9%

Mexican students in the US 2015 - 2021, and percentage change year-on-year. Source: [US Department of Trade](#)

US Institution Type	%
Associates Colleges (Two Years)	18%
Baccalaureate Colleges (Four Years)	4%
Masters Colleges & Universities	8%
Doctorate Granting Universities	67%
Special Focus Institutions	3%
Public Institutions	68%
Private Institutions	32%

Mexican students in the US by US institution type. Source: [US Department of Trade](#)

Mexican student numbers to the US have been consistently dropping over the past few years, potentially due to cross-border tensions and an increased presence of other increased marketing presence of other destinations. Affordability is the primary concern of Mexican

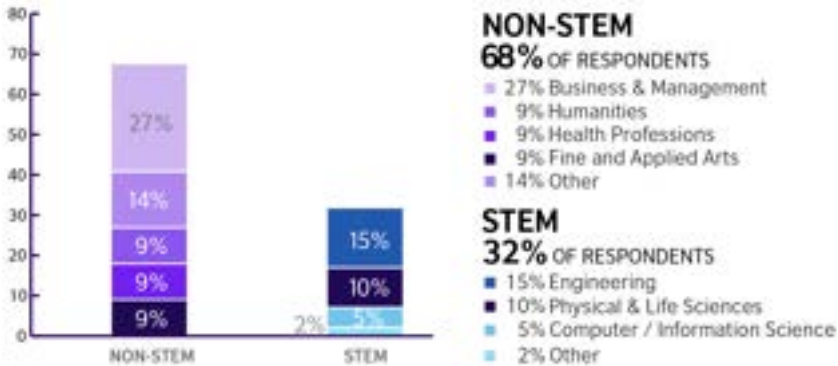
students as they consider study in the US, according to a [2019](#) Intead report, which also stated that 27% of Mexican students are looking for courses in the field of business and management; along with 15% seeking engineering programmes.

### Top 5 Influencers

Most Important Factors When Selecting a University in the U.S.:



Top 5 influencers for Mexican students when choosing a university in the United States. Source: [Intead 2019](#).



Programme interests in the US among Mexican students. Source: [Intead 2019](#).

Social Network	Number of followers	Average engagement
<b>EducationUSA México</b>		
<a href="#">Instagram</a>	3,679	13
<a href="#">Facebook</a>	14,824	36
<a href="#">Twitter</a>	6,954	2
<b>EducationUSA Global</b>		
<a href="#">LinkedIn</a>	23,917	-
<a href="#">Instagram</a>	107,000	-
<a href="#">Facebook</a>	475,000	-

Social media presence of EducationUSA in Mexico, with number of followers and average audience engagement on ten posts.

There are [23 EducationUSA](#) centres dotted around Mexico, offering free services to students and engaging with high school counsellors and local universities. While the EducationUSA Mexico Facebook page has an average of 36 engagements (based on ten posts), it is important to note that one post relating to a scholarship skewed the average with 215 audience engagements alongside three posts with zero engagement, and others with only one or two. Engagement was lower on Instagram and minimal on Twitter.

## > Canada

Mexico is Canada's largest Latin American source market, and Mexican students tend to see study in Canada as a first step towards immigration. While student numbers took a hit in 2020 due to the pandemic, the recovery was remarkable a year later. Canada relaxed short term visa requirements in 2016, and this led to increased numbers of language students from Mexico. Three years later, there were more than [17 thousand](#) Mexicans studying English in Canada, along with 1,441 studying French.

As in the US, Canadian colleges are popular for Mexican students due to their flexibility and affordability. In 2021, four out of five of the most popular schools among Mexicans in Canada were colleges whose students made up more than half (56%) of new student permits in 2020, compared to 16% issued to university students. A year later, the proportion of visas issued by university students had grown to 20%, and college students visas were down to 46% of overall students visas for Mexicans. The proportion of visas awarded to primary and secondary students jumped from 15% to 26% in the same period.

Year	Number of Mexican Students	Year-on-year change
2015	4,225	-
2016	4,905	16%
2017	5,440	11%
2018	5,750	6%
2019	6,255	9%
2020	3,650	-42%
2021	9,710	166%
2022	10405	7%

Mexican study permit holders in Canada 2015 - 2022. Source: [IRCC](#)

Canadian study permits awarded to Mexicans by study level 2020, 2021. Source: [ApplyInsights](#)

Social Network	Number of followers	Engagement
<b>EduCanada (Global)</b>		
Instagram	3,727	47
Facebook	72,000	30
LinkedIn	3,693	6

Social networks used by EduCanada; number of global followers; average level of engagement on ten posts.

While EduCanada does not have specific social media profiles for Mexico, there is a dedicated (albeit plain) [website](#) for interested students, in

both English and Spanish, carrying links back to the EduCanada global site.

## > Australia

Mexico is currently the 35th largest source market for international students in Australia, and 3% of Mexico’s internationally mobile third level students travel there for study, according to UNESCO [figures](#). Higher education students make up 19% of Mexican students in Australia, 70% of whom study at postgraduate level. VET students make up nearly half (48%) of all Mexican students in Australia, while 10% pursue non-award programmes.

Austrade (Australian Trade and Investment Commission) launched the ‘[Study Australia Experience](#)’ platform in January 2022 bringing Spanish language content to Mexican students. A regional [communications campaign](#) with targeted advertising reached 20 million prospective students in the region in the first six months, bringing 310,000 thousand visitors, and 37,000 registered users to the platform in the first six months. Dozens of live events have been held in the region to promote the destination and Australian education institutions, involving alumni ambassadors, university representatives and education agents. A three hour virtual fair was held in June 2022 for 1,700 prospective students.

In 2021, Austrade connected Australian institutions with IB schools across Latin America, and the local team proactively supports FIDERH and FUNED, with events aimed at increasing Australia’s market share of outbound students availing of scholarships and education loans. A FIDERH [webinar](#) was held on 30 January 2023 - ‘Scholarships and financing for Mexican postgraduate students’.

Year	Number of Mexican students	Year-on-year change
2015	1,974	-
2016	2,184	11%
2017	2,474	13%
2018	2,613	6%
2019	3,106	19%
2020	2,440	-21%
2021	1,302	-46%
2022	2,020	55%

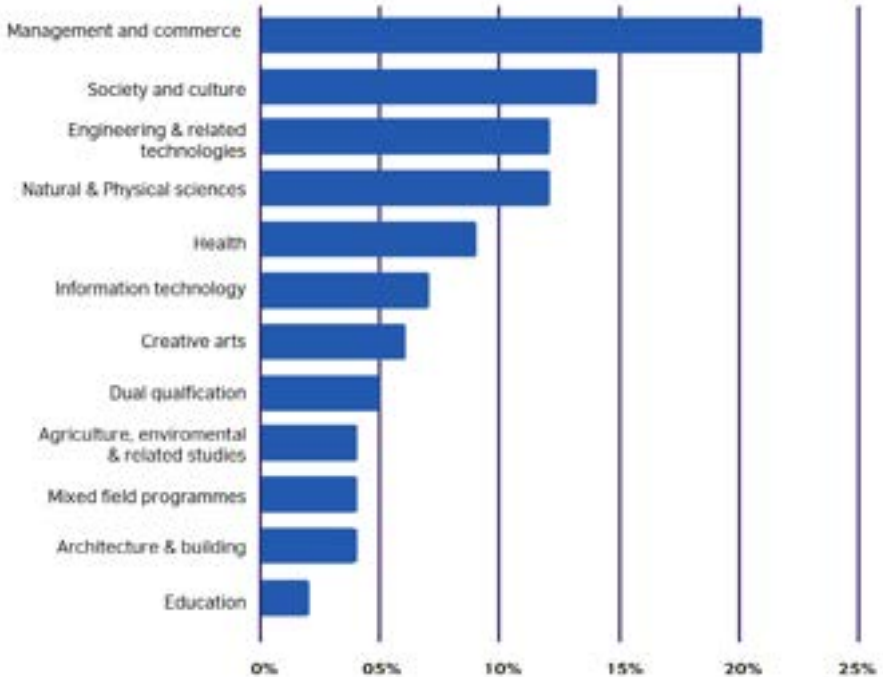
Mexican students with student visas in Australia 2015 - 2022, and Year-on-year change. Source: [Australian Government Department of Education](#)

Provider	Student numbers	Percentage
VET	1,135	48%
ELICOS	563	24%
Higher education	448	19%
Non-award	230	10%
Schools	<5	-

Enrolment numbers in Australia from Mexico January - October 2022. Source: [Australian Department of Education](#)

The Australian embassy also organises education [events](#), where hot leads from the platform are invited along with pre-departure students, agents, local scholarship entities and in-market representatives. Study Australia had a pavilion at BMI recruitment fairs in Mexico in 2022, with 19 Australian exhibitors.

Study Australia Experience has a LatAm presence on Instagram and Telegram, where the most recent ten messages were viewed an average of 421 times. Austrade maintains a global presence with 'Study Australia' profiles on Facebook and Instagram.



Mexican higher education enrolments in Australia by field of education, January - October 2022. [Australian Department of Education](#)

Social Network	Number of followers	Engagement
Study Australia Experience - LatAm		
<a href="#">Instagram</a>	10,800	118
<a href="#">Telegram</a>	1,174	-
Study Australia (Global)		
<a href="#">Instagram</a>	37,200	-
<a href="#">Facebook</a>	366,000	-

Social networks used by Study Australia Experience; number of followers; average level of engagement on ten posts

## > United Kingdom

UNESCO [figures](#) place the United Kingdom as the sixth most popular destination for Mexican internationally mobile third level students, with 5% market share. However, HESA figures illustrate that numbers are dropping year-on-year, and no visible recovery is apparent in post-pandemic numbers. Of the 1,595 higher education students from Mexico in the UK in 2020/21, 74% were pursuing postgraduate qualifications, and the remainder were studying at undergraduate level. London is the city of choice for 31% of Mexicans that study in the UK, while 15% opt to study in Scotland.

UK universities have good institutional partnerships in Mexico - the National Science Foundation CONACYT has 21 UK partners, non- profit loan provider FUNED has 35, while Bank of Mexico’s FIDERH has agreements in place with 32 British third level institutions.

Student fair organiser BMI held a virtual fair in April 2022 in partnership with FUNED, the non-profit loan provider, and the UK was a desired destination for 49% of the 2,276 students that took part. Students were permitted to choose more than one destination country of interest, and Canada was chosen by 52%, the US by 46%. Australia trailed behind Spain, Germany and France at 26%. Nearly a third of the students (27%) came from Mexico City, 10% were in Puebla, 9% in Guadalajara, 8% in

Monterrey, and 5% in Querétaro and Juárez, respectively. The most popular areas of study selected by students were business and management; (30%); engineering (27%); computer sciences; and accounting and finance (14%, respectively).

At separate postgraduate in-person fairs, the UK was in joint third place as preferred destination for Mexican students. Canada led with 51% of student preferences, followed by Spain (41%), with the UK and US in joint place as selected by 40% of more than four thousand students attending the fairs across four cities (Mexico City, Guadalajara, Puebla and Monterrey). Eighteen UK institutions displayed at BMI events in Mexico in the second semester of 2022 (there were 36 from the US, 19 from Australia and 17 from Canada).

Year	Number of Mexican students	Year-on- year change
2015	1,990	-
2016	2,080	5%
2017	2,150	3%
2018	1,995	-7%
2019	2,125	7%
2020	1,915	-10%
2021	1,595	-17%
2022	-	-

Mexican higher education students in the United Kingdom 2015 - 2021. Source: [HESA](#)

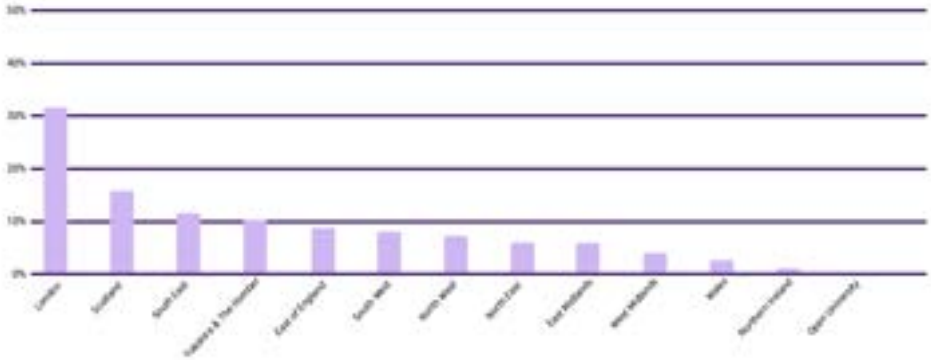
Postgraduate (research)	30%
Postgraduate (taught)	44%
First degree	24%
Other undergraduate	2%

Level of study: Mexican higher education students in the UK 2020/21. Source: [HESA](#)

Despite having impressive numbers of followers on social media, material posted by the British Council receives very little engagement. While the average engagement (based on ten posts) on Instagram is 45, this mean was greatly impacted by two videos posted recently (one getting 119 audience engagements and the other attracting 230).

Social Network	Number of followers	Engagement
<b>British Council Mexico</b>		
<a href="#">Facebook</a>	205,000	8
<a href="#">Instagram</a>	16,900	45
<a href="#">Twitter</a>	30,700	3
<b>British Council (Global)</b>		
<a href="#">Facebook</a>	2,400,000	-
<a href="#">Instagram</a>	182,000	-
<b>StudyUK_</b>		
<a href="#">Instagram</a>	92,000	-
<b>Study UK - British Council</b>		
<a href="#">Facebook</a>	628,880	-

Social networks used by British Council Mexico; number of followers; average level of engagement on ten posts.



UK region where Mexican higher education students are studying 2020/21. Source: [HESA](#)



## Exclusive Survey

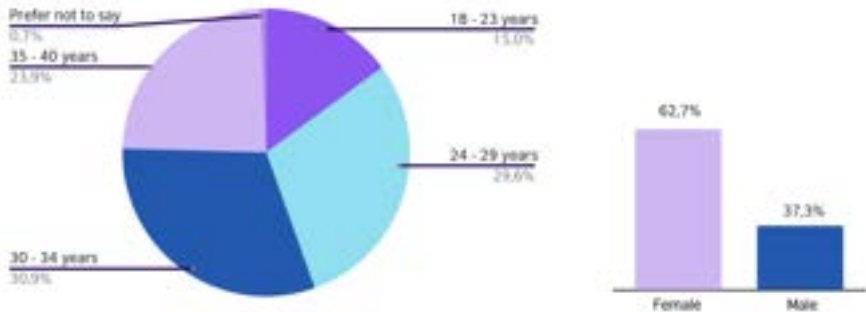
# Student Snapshot Mexico

An exclusive survey was completed by 301 Mexicans in January 2023 on behalf of the British Council. Survey respondents were aged from 18 - 40 years, with 15% aged 18 - 23 years; 30% aged 24 - 29 years; 31% aged 30 - 34 years; 24% aged 35 - 40 years (two people did not confirm their age). A majority (42%) of respondents were in Mexico City and Federal District, while 12% were located in Nuevo León, 9% in Jalisco, 8% in Chihuahua, 3% respectively in Puebla, Aguascalientes, and Baja California.

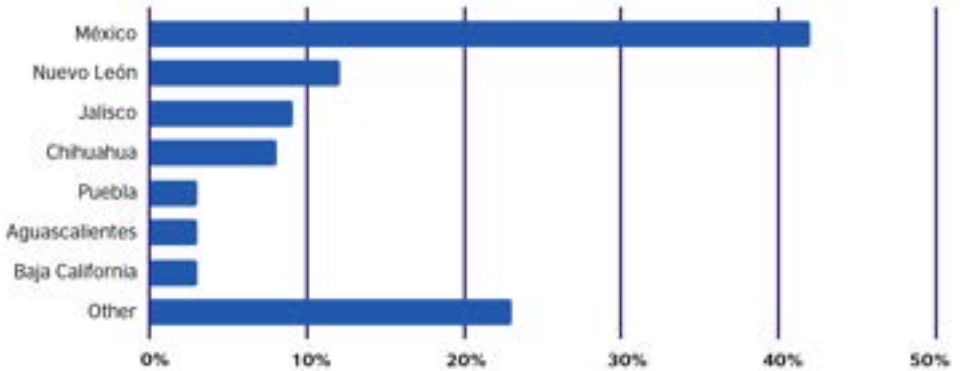
Only 2% were not interested in learning more about study abroad opportunities. More than half (57%) of Mexicans would like to receive information by email; 14% said they'd like to

get information by post; while 13% cited WhatsApp as the preferred way to receive information.

The survey was completed through a paid campaign on Survey Monkey, and only those with a pre-registered profile that showed family income above MEX 45,000 per month (around GBP £1969) were qualified to respond. It was considered that families with a lower income may not be able to afford to study overseas, and therefore their opinions could dilute the focus of the study. The vast majority (94%) answered the survey on a mobile phone or other handheld device, while the remainder responded on desktop computers, and 72% of the sample were female.

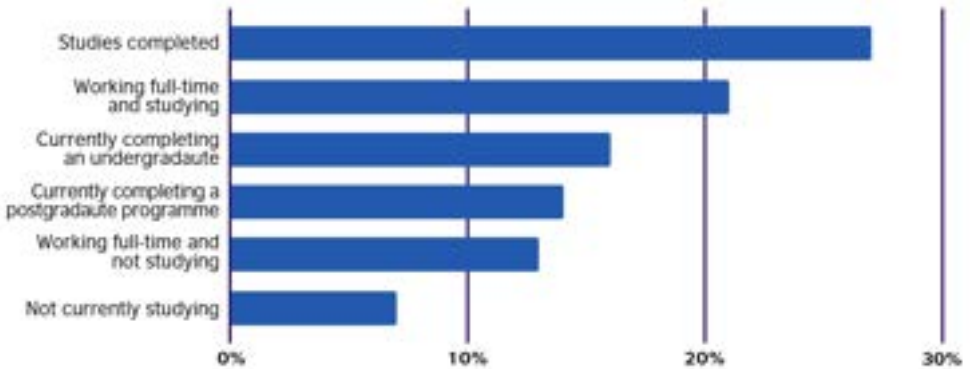


Age profile and gender of respondents to Mexico survey. Source: British Council Mexico Survey by SOS Education Consultancy 2023



Department in Mexico where respondents are located. Source: British Council Mexico Survey by SOS Education Consultancy 2023

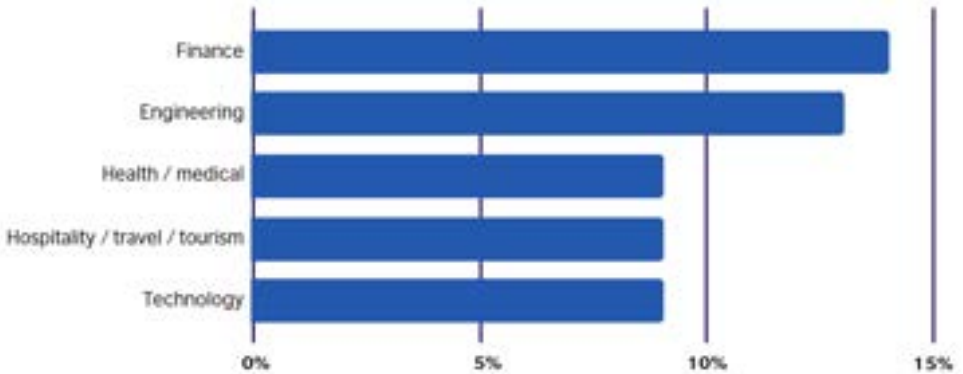
## > Current study status



Current study status of respondents to Mexico survey. Source: British Council Mexico Survey by SOS Education Consultancy 2023

One hundred and fifty-three (51%) of the Mexicans that responded to the survey indicated that they are currently studying, and of these, 41% are working full-time. Of those that are studying, 31% are pursuing undergraduate programmes, while 27% are studying at postgraduate level, and 41% did not mention their level of study.

## > Future Career Aspirations

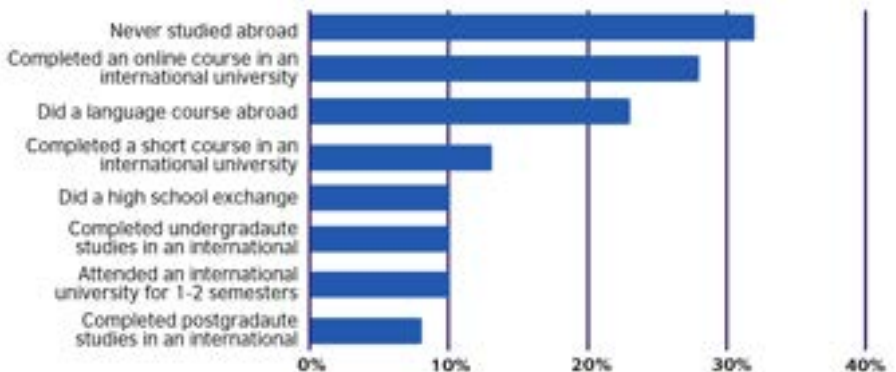


Which of these sectors best describes where you want to pursue your future career? Top five responses. Source: British Council Mexico Survey by SOS Education Consultancy 2023

Finance was the most popular future career area for Mexicans, cited by 14% of respondents; with a similar proportion (13%) indicating an interest in an engineering career. Health, hospitality, and technology were the desired career paths for 9% of respondents, respectively; while 6% wanted to work in marketing, along with 5% that wanted a legal career, and 5% that desire a career in the field of education.

A career in government or the public sector was selected by 4% of Mexicans, as was a career in research and development, while 3% chose careers in telecommunications, logistics, respectively. Only 2% of Mexicans identified preferred career paths in areas of pharma or biotechnology, media or advertising, manufacturing, and human resources.

## > Have you ever studied abroad?



Have you ever studied abroad? (select up to three answers). Source: British Council Mexico Survey by SOS Education Consultancy 2023

One in ten (10%) respondents completed their undergraduate studies in an international university; 23% of these respondents also completed international postgraduate studies; while 29% of that subset had also completed an online course in a foreign third level institution. Four in ten (39%) Mexicans that completed an international undergraduate programme had also been on an overseas language programme; while 10% of them had been on a high school exchange.

Ten percent of the Mexican sample reported having completed a high school exchange programme; with 10% of these later completing international undergraduate programmes. A quarter of those (23%) that had been on a high school programme said they have completed an online course in a foreign third level institution.

More than one fifth of Mexicans (22%) completed a language programme overseas;

and 18% of these also completed an international undergraduate programme; while 13% had engaged in a postgraduate programme overseas. Four in ten (39%) Mexicans that had travelled for language learning also reported that they had completed an online course in an international university; while 16% of this subset said they had completed a short course in a foreign third level institution.

Nearly one in three (28%) of the overall sample said they had completed an online course in an international university; and 31% of those had previously completed an international language course; 8% of this subset had been on a high school exchange programme; 11% had completed their undergraduate studies overseas; while 8% had engaged in an international postgraduate programme.

## > Have you ever considered studying in a UK university?

I believe that study in the UK would greatly improve my career prospects	33%
I have heard great things about UK education	30%
It is my dream to study in the UK	25%
I would like to complete studies online in a UK university	22%
I could only go if I won a scholarship	15%
I would need to improve my English a lot	11%
It is my dream to study abroad, but I never considered the UK	9%
I have never thought about studying in the UK, but I would consider it	9%
I would study in the UK if there was a loan available that I could repay after graduating	9%
I have never heard much about studying in the UK	4%
Study in the UK is too expensive for me	4%
I have no interest in studying overseas	1%
I would not like to travel so far from home	1%

Have you ever considered studying in a UK university? (select up to three responses)  
Source: British Council Mexico Survey by SOS Education Consultancy 2023

One quarter (24%) of respondents in Mexico stated that it is their dream to study in a UK university; and 41% of these have heard great things about the British education system; while 33% of them believe that a UK qualification would have a beneficial impact on their career. However, 12% would need to improve their English first. None of the Mexicans who said study in a UK university was their dream mentioned that this venture would be too expensive (perhaps they do not know how much it costs); however, 15% of the subset mentioned that they would need to access an education loan to bring this dream to fruition; along with 11% for whom a scholarship would be necessary. Of those that cited a dream to study in the UK, 26% would like to complete an online course in a British university.

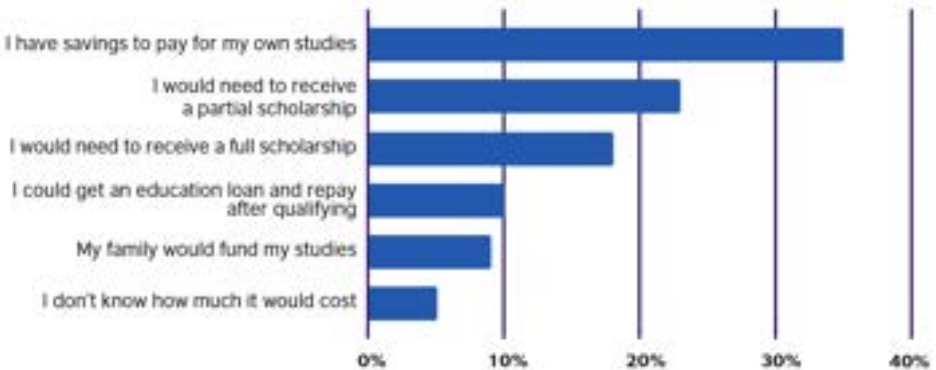
One third (32%) of Mexicans believe that a UK qualification would be helpful for their future career; with 41% of those saying they have

heard great things about the British education system; while 29% were interested in pursuing an online programme at a UK university. Meanwhile, 10% of this subset said their English would need improvement first; 9% said they would need an education loan if they were to consider this option; while 13% of the subset said a scholarship would be necessary.

More than one fifth of the Mexican respondents indicated an interest in online learning from a UK university; with 32% of those saying they have heard positive things about the UK education system; while 42% of that subset believe that UK qualification would be good for their careers.

From the overall sample, only 4% thought study in the UK would be too expensive for them. Almost one in ten (8%) said it was their dream to study overseas but they had never considered the UK.

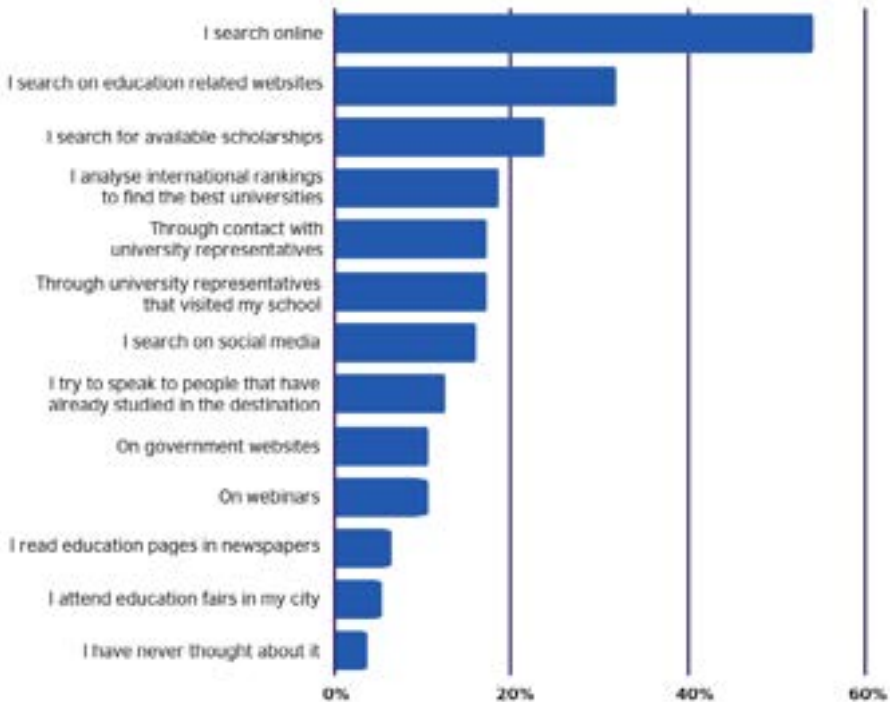
### > How would you fund your overseas studies?



If you were approved to study abroad, how would you fund your overseas studies?  
 Source: British Council Mexico Survey by SOS Education Consultancy 2023

Just under half of Mexicans (44%) said they would fund their own studies (80% of these from personal savings, and the remainder with family support); 41% stated that a scholarship would be necessary (56% of these would require a partial scholarship and 44% would need 100% financial support); 10% would get a loan; and 5% did not know how much it would cost.

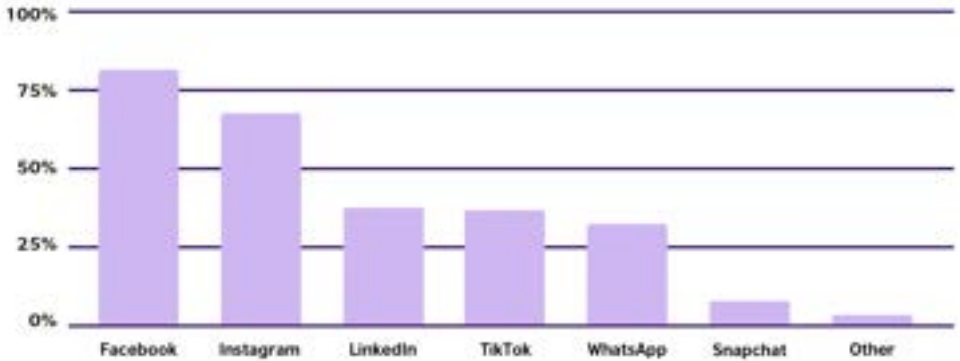
## > Best information source about overseas study?



Where would you look for information about overseas study? (choose top 5)  
Source: British Council Mexico Survey by SOS Education Consultancy 2023

The internet was seen as the best means of finding out about study abroad, and 54% would search online. Three of ten (32%) specifically mentioned education related websites; while 11% cited government websites as good information sources on the topic. A search for available scholarships was a good means of becoming informed for 24% of respondents; while 19% thought a review of international university rankings would be helpful. Contact with university representatives was mentioned by 18% of respondents (combining two responses) as a good way to get informed; while only 6% said they would attend education fairs in their cities. Social media was seen as a good study abroad information source by 16% of Mexicans.

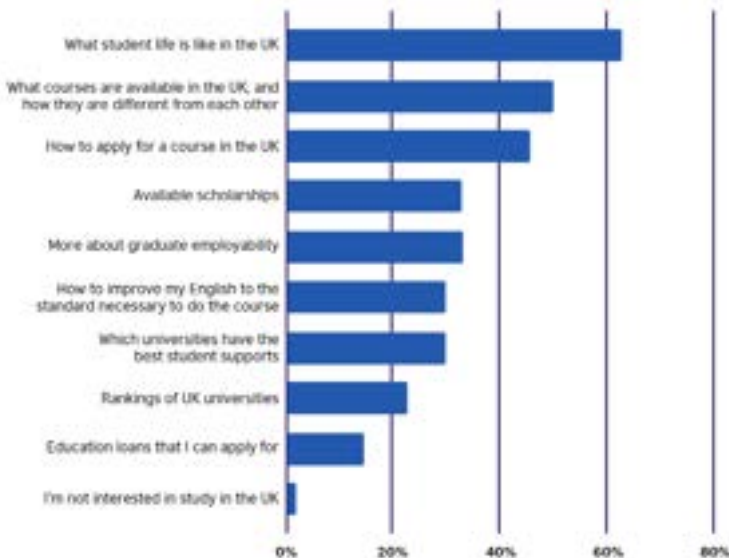
### > Best social media for study abroad?



What social media would you use to find out more about study opportunities? Source: British Council Mexico Survey by SOS Education Consultancy 2023

Facebook emerged as the clear favourite for Mexicans looking for study abroad information on social networking sites, cited by 81% of respondents; while 67% said Instagram was a good source. LinkedIn was indicated by 37%; and Tik Tok by a similar number (36%).

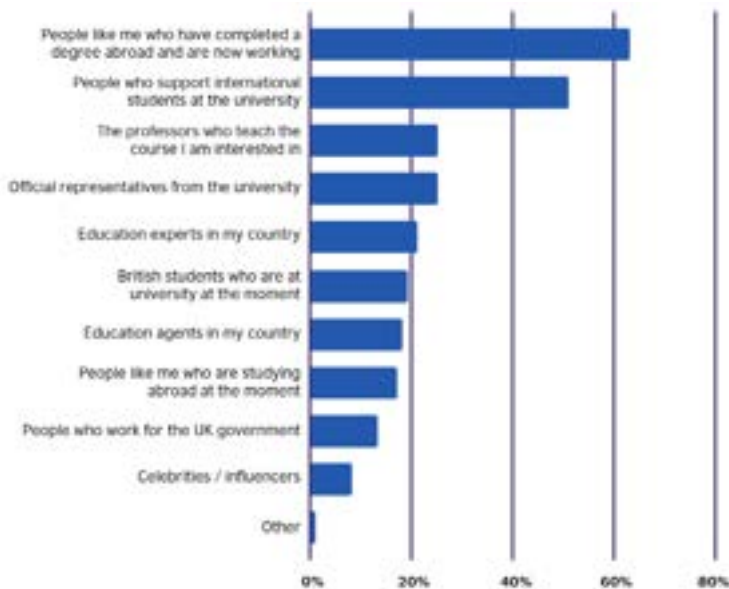
### > What do you want to know about study in the UK?



What would you like to learn more about study in the UK? (choose all that apply) Source: British Council Mexico Survey by SOS Education Consultancy 2023

Mexicans' greatest curiosity about study abroad is around student life in the UK - indicated by 63% of survey respondents. Half of those consulted (49%) said they want to know about various UK course offers and how one differs from the next; while a similar number (46%) want to know how to apply to courses in the UK. Graduate employability was a priority for one third (33%) of respondents; scholarship availability was the crux for 33%, while 30% said they would like further information on how to bring their English proficiency to the level necessary for overseas study. The same proportion (30%) want to know which universities offer the best support services. Information regarding the ranking of UK universities was an information priority for 23% of respondents. Just 2% responded to this question by saying they are not interested in studying in the UK.

## > Trustworthy information sources



If I look for information about studying abroad, I most like to hear from (choose 3)  
Source: British Council Mexico Survey by SOS Education Consultancy 2023

Most Mexicans (80%) want to hear from their peers; and 76% of those particularly want to hear from peers that have already studied abroad and are now in their professional careers. More than half (51%) of Mexicans would like to hear more about international study options from the people that offer student support on campus; and a quarter of respondents (25%) indicated that they would like to engage with academic personnel during this process. One in five (21%) said they would like to hear from education experts in their country; 18% stated a preference to get information from education agents; while 13% said they would like to hear from people who work for the UK government. Just 7% said influencers or local celebrities would be good people to hear from regarding study abroad.



## Exclusive Survey

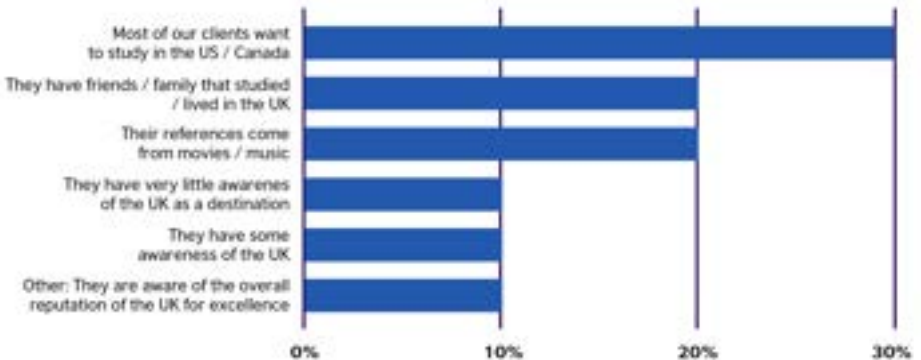
# Agent Snapshot Mexico

Ten agencies in Mexico responded to a January 2023 survey for the British Council. They were asked about client perceptions of the UK as a study destination and what support they would like to see to help to stimulate further higher education sales to the UK. While many questions were multiple choice, agents were invited to add their opinion as desired.

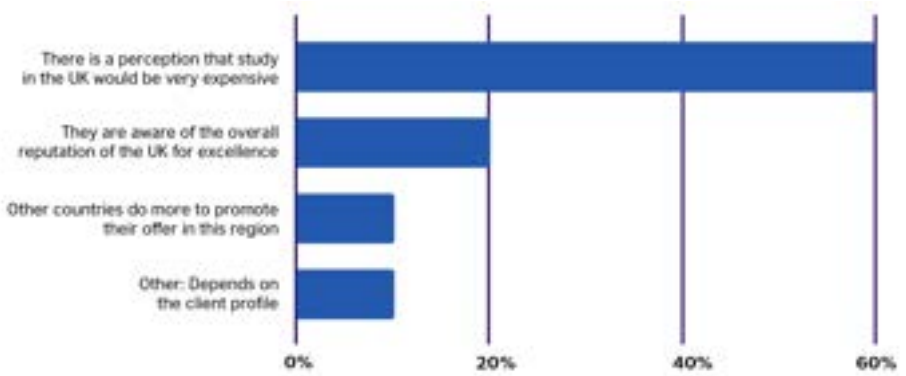
None of the agencies reported that demand for the UK has increased since the pandemic, three said enquiries had decreased, while 70% said demand had not changed in recent years. Most (67%) said they would like to receive updates and information from the British Council by email, while 22% said they preferred WhatsApp as a means of communication.

Agents were asked to define the proportion of their clients that were self-funded, on full or partial scholarships, or in receipt of education loans, and while not all answered in this format, it would seem that at least 50% of their university-bound clients are self-funded. One agent reported that 100% of their clients pay for their own studies without any need for external financial support, while two others said 85% and 75% respectively could pay their own way. Half of the agents said an average of 20% of their clients avail of education loans (FIDERH, Edupass, Laudex), while eight agents mentioned an average of 30% of their clients getting partial scholarships.

### > What do your clients know about the UK as a country?



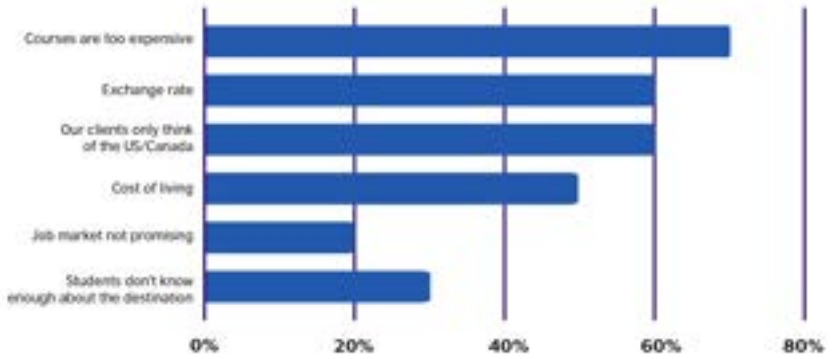
## > What do your clients know about the UK as a study destination?



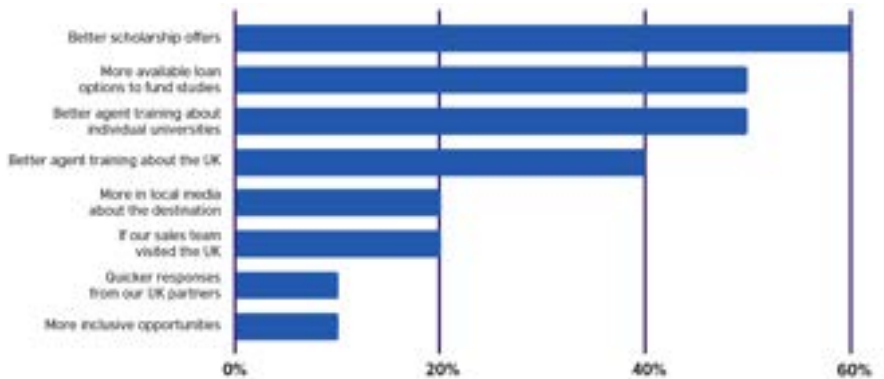
## > What motivates your clients in their choice of institution?

Reason	Percentage of agents citing reason
Cost of course	90%
Opportunities to enter the workplace after their studies are complete	50%
Cost of living	50%
Permission to work while studying	40%
International Rankings	40%
Quality of teaching	40%
Quality of life	30%
Possibility to pay in instalments	30%
Exchange rate	20%
Security	20%
Cultural aspects	10%
Proximity to other European countries	10%
Weather	10%
Family opinions	10%
Other: Positive engagement during the application process	10%
Other: Financial supports (scholarships & loans)	10%

> What are the main challenges to third level study in the UK?



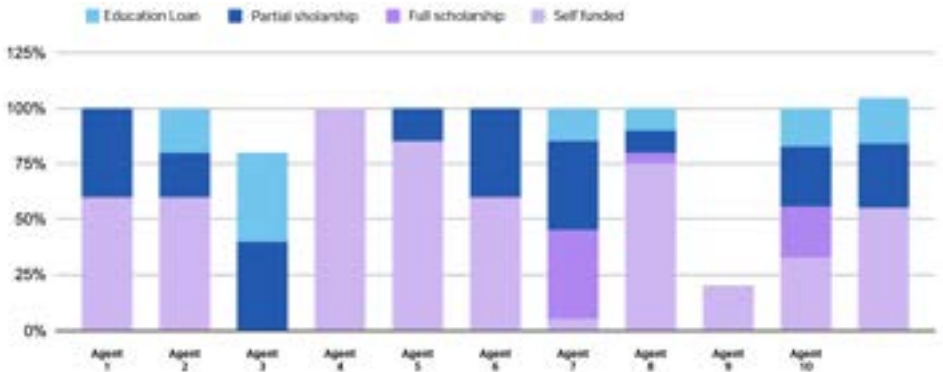
> What might cause demand to increase?



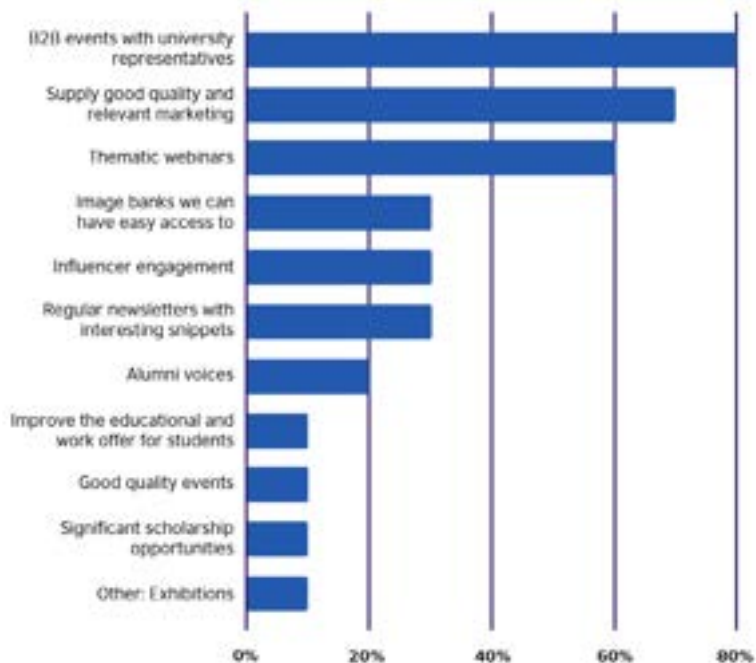
## > What would help you to sell more UK higher education products?

Clear immigration information	70%
More scholarships	50%
Key contacts in university representatives	50%
Familiarisation trips to visit British universities	50%
Identification of unique selling points for each university	40%
Quick responses from UK partners	30%
Better training regarding the UK as a destination	30%
More information regarding inclusive opportunities/supports	30%
Regular in-person training sessions for our sales team	30%
Clear salary scales / expectations for graduates	10%
Relevant employability statistics	10%
Strong alumni testimonials	10%
Other: Scholarship / loan combinations allowed	10%

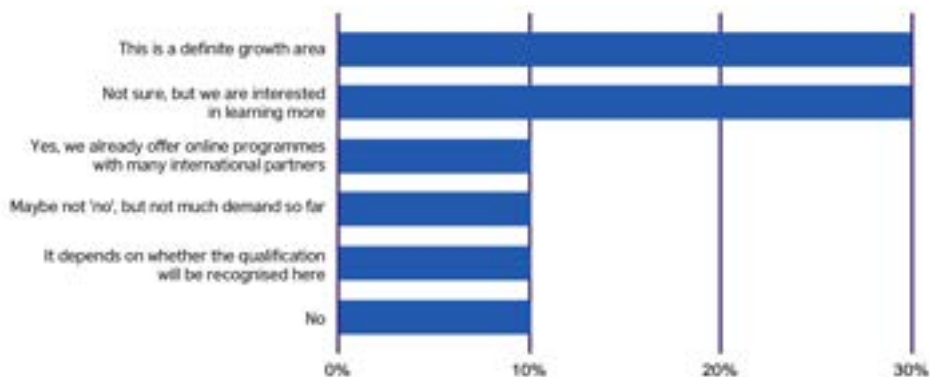
## > How do your university-bound students fund their studies?



## > How can the British Council support your agency to increase applications?



## > Do you see a market for an online offer from UK universities?



# Mexico analysis

The UK is the sixth most popular destination of internationally mobile third-level Mexican students, according to UNESCO [figures](#), with a 5% market share that is dwarfed by a 42% share enjoyed by the US. However, the number of Mexican students going to the US has been dropping consistently in recent years. Extended border closures in Australia had a big impact on Mexican student numbers in 2020 and 2021, but recovery was strong in 2022.

While Canada's overall student numbers from Mexico took a hit in 2020 with the pandemic, the destination showed remarkable recovery the following year with student numbers growing by 166%. Canada is the number one higher-education student destination for 72% of the agents in Mexico contacted in November 2022 on behalf of the British Council and a top five destination for 94% of them. Only 45% of agencies have direct relationships with UK universities and 83% would like greater engagement.

Students do not automatically think of the UK when considering overseas study and agents say the UK is a difficult sell when clients have the US and Canada in mind. UK branded events historically organised by the British Council were well known and helped to promote the UK as a high-quality study destination. Agents that sell the UK said destination promotion takes away from their daily business of selling programmes. While there is some awareness of the UK reputation for excellence, most agents said clients think the UK is above their price point, and that UK references come from anecdotal sources (friends and family, or cultural).

However, the UK was the most popular destination in 2022 for postgraduate [scholarships](#) offered by CONACYT, Mexico's National Science Foundation (21% of all funded students were UK-bound, 17% went to the US, 9% to Canada and 2% to Australia). This demonstrates at least a certain level of awareness of the UK in Mexico, and is testament to the engagement of British universities (CONACYT has 21 UK partners, representing 34% of their global alliances). The UK is the second most popular destination (after the US) for students acquiring education finance from FUNED, and the Mexican non-profit counts 35 UK partners (33% of its global total).

UK engagement can be seen at student recruitment fairs in Mexico, and BMI fair organiser reports that eighteen UK institutions, mostly universities, displayed at their fairs in Mexico in late 2022. Competitor FPP announced post-pandemic that their recruitment events would remain 100% online but have since changed their minds, and bring back in-person fairs to the region in 2023. In September 2022, there were three UK universities at an FPP virtual fair for Mexico, along with 7 from Australia, 11 from the United States and 19 from Canada.

The vast majority of agents (90%) said the price of a course was a primary motivator when their clients are choosing an international study institution. However, when a selection of upper- middle-class Mexicans were asked if they ever considered study in the UK, price did not emerge as a strong consideration, and only 4% said they considered study in the UK to be too expensive. This was echoed in another question regarding the financing of

international studies - just 5% said they did not know how much such a venture would cost. Most believed that study in the UK would greatly improve career prospects or said they heard great things about UK education.

Agents thought demand for the UK might increase if there were more education loan options. While it is important to ensure that Mexican students are aware of loan options, only 15% of the prospective student survey listed loans as a priority, although 33% wanted to know about available scholarships. Nearly half (44%) of students had their own funding to cover the cost of international studies, either from their families or from their own savings. Agents confirmed that at least half of university-bound students are self-funded.

Better training for agents on the offer of individual universities would boost demand, said half of the agent cohort, while 40% want more training about the UK as a study destination. Nearly one fifth (18%) of respondents to the student attitude survey want to hear information about study abroad from agents in their country, highlighting the importance of well-trained agent networks.

Agents want B2B events with university representatives, key contact points for each university (with quick responses), unique selling points for each third level institution, accompanied by quality marketing collateral and easy-access image banks. The fact that 70% of agents also mentioned that they want clear immigration information suggests that current sources are not clear, and this should be reviewed.

Mexican students value the opinions and testimonials of alumni in the workforce over the experience of those currently studying in the UK. They want to know the return on investment, and not just the student experience. Mexicans prefer to hear from

university personnel than to have study abroad information provided by government sources. They value insights from student support officers in destination universities, and university professors. This demonstrates a value for UK universities to have in-market representation to give students clear and easy access to official spokespeople.

Agents suggested that influencer engagement would support agencies to increase applications, but this was not backed up by student feedback (only 8% want to hear about study abroad from celebrities). Influencer engagement is not recommended for Mexico.

In-market activity should focus on lead generation, for carefully planned and relevant email campaigns, with clear calls to action. Email titles are very important in the competitive landscapes

of contemporary inboxes. While it is not practical or cost-effective to send study abroad information by post to all leads, some physical marketing should be made available in the market, with agent partners and school counsellors having a hard copy of university prospectuses, for example. If a lead is considered to be particularly hot, physical material may be forwarded by post.

Finance and engineering were the top two areas in which survey respondents want to pursue their future careers, reflecting trends in anglophone markets. Business and management was the number one field for those considering study in the [US](#), for higher education students in [Australia](#), and for students attending a BMI FUNED event in 2022. Engineering was popular too, although the field of society and culture was a bigger hit for Mexicans in Australia. While information technology was the sixth choice in Australia in 2022, and 7th place for students looking to the US, computer science was the third most

popular field for students at a BMI event in 2022. Engineering (28%) was the top field of study for CONACYT funded UK-bound students in 2022, 17% studied medicine and health sciences, 15% in social sciences, biology and chemistry, respectively.

More than one fifth (22%) of Mexican students want to complete an online programme in a UK university, and 28% have already completed online programmes in international universities.

One Mexican agent already offers online programmes with international partners, and 30% consider an online offer from UK universities to be a definite growth area, while one. A further five are interested in knowing more, with one saying that it would depend on whether the qualification would be recognised in Mexico.



# Recommendations

## > High level engagement

- Liaison is recommended with [CONOCER](#), the National Council for Standardisation and Certification of Labour Competencies, which is part of the Ministry of Public Education, and aims to strengthen economic competitiveness in Mexico by developing competence standards and certifying skills.

## > UK engagement

- UK universities are engaging with the Mexican market, but there is always room for improvement. An assessment is recommended, perhaps in survey format, to assess current levels of engagement in Mexico, and to identify which already have in-market representation. The study should also aim to identify any particular issues that UK universities face when recruiting from this market.
- The British Council should offer support to those currently working in the market. Events to promote the UK as a study destination are needed, along with B2B events for representatives already in-country, offering a low budget way to start aligning universities with agents and school networks.

## > Brand building

- The #StudyUK brand should be developed as a distinct part of the British Council's everyday activities. Such brand identity will be important to give a strong message that something new is happening in the market.
- A Spanish version of the [Study UK](#) platform should be launched following a strategic media campaign, and an invitation for students to attend launch events in key Mexican cities: Mexico City, Guadalajara, Monterrey, Juárez. The site should be open to all, but require some sign-up so that universities can correspond with interested students, and measure engagement from the market.

## > Communications strategy

- Mexico specific pages should be created on Facebook and Instagram (it may be practical to have LATAM profiles to cover other Spanish speaking countries in the region). While more students said they look on Facebook for study abroad information, Instagram emerged as better for audience engagement.
- Messaging must be interesting and relevant to a Mexican audience. While an Indian or Chinese student may have great testimonials to offer, their message will not resonate in the same way that a Mexican voice will. Close engagement with alumni will ensure original and local voices.

- Plan a series of webinars to examine specific study and career fields. Academic, industrial, and alumni voices will add a great blend to events like this, which should be delivered in Spanish and recorded for future use. Avoid bringing too many universities to these initial thematic webinars, as the initial and most pertinent task is to promote the UK as a destination.
- Identify key publications in Mexico that have education coverage and provide original content (not a typical sales pitch) that brings something new - a study, a new way of thinking or doing – anything that will be interesting to journalists and editors, that allows communication of brand messaging, and that includes a call to action for further lead creation.
- Key messaging that will resonate with a Mexican audience should include: security; affordability; specific courses available in the UK and the associated career prospects; on-campus student supports and services; graduate employability; internships available; and career supports. Create marketing collateral to support this messaging, preferably using Mexican voices or real images from UK universities, and not stock images.

## > Agent relationships

- The British Council should seek a closer relationship with AMTE for quick engagement with at least 27 Mexican agencies. AMTE have suggested various possibilities for engagement that include sponsorship of monthly meetings or AGM, sponsorship of their end-of-year event to include a ‘strategic session’ for agents, and/ or regular webinars for member agencies.
- It will be important to bring something new to AMTE members, whether that is key messaging in the form of marketing collateral, or the launch of the Study UK platform for Mexico. Agents need to know that engagement with the UK brand brings some value-added.

## > EdTech Platforms

- Some outreach to EdTech platforms is worthwhile, if only to ensure that UK brand messaging is up-to-date. ApplyBoard had a portfolio of 80 Mexican agents by the end of 2022, while Adventus was working with 47.

## > School networks

- Develop a network of international and IB schools in Mexico and ensure school counsellors receive all available training, and are aware of brand messaging. Messaging for schools should be available in Spanish, as many parents may not have fluency in English, and they are the primary decision makers for school leavers considering overseas study (as they are often the ones paying for it). Security and student support should be emphasised in messaging.

- Plan B2B events with university representatives so high-school counsellors can get to know the individual university representatives and pass on a sense of security to parents.
- Consider development of junior university programmes, focusing on career areas, with summer programmes to include some cultural activity. Such programmes can be marketed in partnership with agents.
- Offer workshops with some value added (either for students or for counsellors), focusing on career indecision, future career areas, problem solving, or creative thinking.

## > Funding agencies

- UK universities are well represented with CONACYT, FIDERH and FUNED, but there is always room for growth. More UK universities should be informed of opportunities with these entities, and #StudyUK events should be scheduled around launch dates of public calls, end of exam time, results time, etc. Events can be online or in-person, with each event bringing some new theme, like a focus on a specific geographical area of the UK or a specific academic field.
- High level engagement is recommended with private loan providers [Laudex](#), who already list four UK partners, and [Edupass](#), cited by agents in this study.

## > Student recruitment

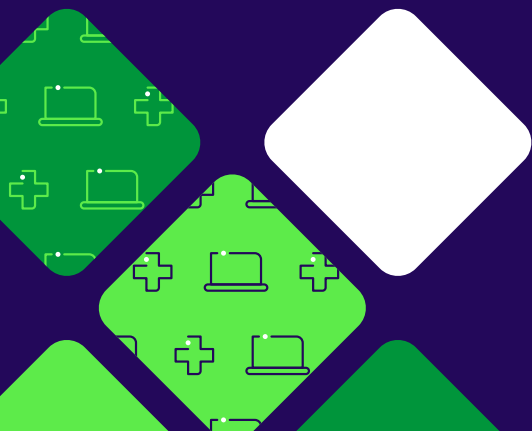
- Boutique #StudyUK events are better than multi-destination events and should be planned for key cities, involving alumni participation and workshops in thematic areas (offering some value-added).
- Where there is a group of UK universities exhibiting at existing events, their participation should be branded jointly in a sponsored pavilion. National brand attendance allows individual universities to focus on their own unique selling points rather than promoting the UK as a destination. Attendance at these events will be an important way to start building lead lists for carefully planned email campaigns (57% of Mexicans want to receive study abroad information by email).

## > Online offer

- Explore local regulations regarding recognition of UK qualifications, as well as industrial acceptance of non-award short courses, while evaluating the offer and price point of competitors.
- Review existing UK online offer - there may be content already offered in another country or language that can be repurposed in pilot format. Skills deficits identified in this report should be the focus of an online offer.

# Peru

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# Peru

Population	34 million
GDP 2021	USD \$223.25 billion
Unemployment	7.1% (December 2022)

## Main recommendations:

- High level engagement with government ministries to identify partnership opportunities in tourism and mining sector skills acquisition;
- Launch Spanish language Study UK platform, with events in Lima and Arequipa;
- Develop links with high performance ‘COAR’ schools & investigate partnership with Ministry of Education for inclusion scholarships;
- Virtual B2B interactions between UK universities and Peruvian agents;
- Ensure UK attendance at PRONABEC annual event, and communications strategy around scholarship call announcements.

## Market Overview

Peru was one of the fastest growing regional economies over the past decade (average growth of 6%), according to the [World Bank](#), and its GDP of USD \$223.25 billion in 2021 was a considerable increase ([more than 13%](#)) from a pandemic-driven drop of 11% the previous year. Inflation is typically low in Peru, but ran at [8.4%](#) in August 2022, an increase of just over 12% from the previous year, largely driven by food and energy prices.

While the rate of public debt as a percentage of GDP is typically high in Latin America (expected to rise to almost 74% by 2026), Peru tends to

buck this trend and August 2022 [predictions](#) from the Ministry of Economy and Finance suggested a modest 32.5%. The Ministry said theirs would be one of Latin America’s best performing economies over the next four years, predicting a growth rate of 3.3% as a result of: (i) the implementation of public and private spending measures; (ii) the recovery of internal demand after the pandemic; (iii) increased production and exports; (iv) increased productivity and competition; (v) economic planning aligned with the desires of consumers and companies.

## > Political Scenario

However, politics may prove to be Peru's achilles heel. While all Peruvian presidents in the past two decades have been implicated in corruption cases, Pedro Castillo, Peru's seventh president in just over a decade, was the first acting head of state to be investigated by the Prosecutor's Office. A September 2022 [survey](#) by the Institute of Peruvian Studies (IEP) suggested that 65% of Peruvians disapproved of Castillo's management, with political crises accentuated by socio-environmental [conflicts](#), mainly in mining-energy zones. The IEP report showed that 84% of the population disapproved of Congress, and more than half wanted to call general elections.

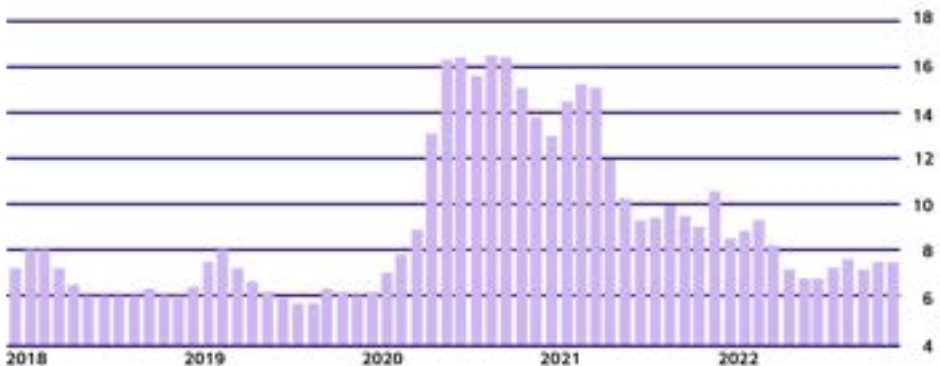
When Castillo dissolved Congress and announced new elections in December 2022, he was quickly arrested and impeached. Just over a year into his term, he had already survived two impeachment votes, the resignation of four prime ministers, and sweeping anti-government protests. Human Rights Watch had previously expressed concern over a [bill](#) that allowed the government to issue "temporary measures" in cases of emergency, including seizure of telecommunications services. The situation in Peru remains highly volatile with violent protests in several urban centres.

## > Unemployment

Unemployment reached [16.5%](#) in September 2020 (a consequence of long-lasting lockdowns during the pandemic), but dropped to 7.1% by the end of 2022. While higher than the pre-pandemic rate of 6.3%, it is still lower than Peru's 20-year average of 8.2%.

[Oxfam Peru](#) reported in February 2022 that the average income dropped by more than 11% between 2020 and 2021, principally affecting women, the least-educated, and

employees of micro and small businesses. In [Q1 2022](#), the National Institute of Statistics and Information Technology reported that although the average income grew 13.2% in the year following April 2021, men were the primary beneficiaries (17.9% rise), while incomes of women only grew by 7.2%. Income disparity is an issue in Peru, and in 2020, 49.1% of income in the country was earned by 20% of the population, according to [Statista](#).



Unemployment in Peru 2018 - 2022. Source: [TradingEconomics.com](#)

## > Skills Shortages

A ManpowerGroup report suggests that 35% of Peruvian businesses were unable to find required talent in October 2021, and employers have focused on three main incentives to attract qualified staff – training, flexibility and higher wages. Of 600 Peruvian employers contacted, 39% were offering more flexible work schedules to new employees, while 31% had increased the salary offer to attract and retain talent.

More than three quarters (76%) of the workforce are in informal jobs (June 2022), with 52% of these holding secondary school qualifications, 15% with ‘non-university higher education’, and a further 12% of informal workers holding a university qualification.

One in three workers in Peru do not have adequate digital skills, according to a July 2022 study of Peruvian companies by Es Hoy, the Inter-American Development Bank and MIDE Development that reported that 80% of companies were struggling to fill digital vacancies. An underwhelming local offer in technological and digital skills is seen as a main driver for this. The Es Hoy report recommended increased training in basic and advanced digital skills, and English, to increase employability and local wages.

Peru is one the largest producers of silver, copper and zinc in the world, mining accounts for around 60% of exports, and there were nearly 200,000 people employed directly in mining in 2017, with estimates the sector will need around 46,000 new recruits in the next decade, with 37% of those roles needing filling in the short term (three years) due to an ageing workforce and plans for the development of three new major mining projects.

According to Austrade (2019), executive and supervisory positions are the hardest to fill in the mining sector, while the largest number of vacancies exist for operator level positions (47%), professionals (22%), and maintenance

workers (17%). Women represent 3% of operations staff, 20% in professional positions, and 6% of executive roles, while young people (aged 18- 29) occupy just 8% of jobs in the mining sector. Training was a priority or very important for most mining companies contacted by Austrade, and all companies had resources allocated for training, with training budgets ranging from USD \$400,000 - USD \$1 million. Half of the companies had already engaged with international education providers, though they noted concerns regarding cost and tax implications.

Around 8% of the Peruvian workforce are employed in the tourism sector (around 1.3 million people) and Austrade pointed to a local need for niche training for employees using new technologies. Peru has national and regional public training bodies for skills development in the tourism and hospitality industry. [PROMPERU](#), part of the Ministry of Foreign Trade and Tourism, offers programmes to improve skills among micro, small and medium-sized enterprises in the tourism sector, for example. In [June 2022](#), the city of Arequipa, a UNESCO World Heritage Site since 2020, entered the Future Tourism programmes of the Inter-American Development Bank (IDB), and a diagnostic study will take place to develop an action plan to accelerate the use of technologies in the tourism sector.

Difficult vacancies to fill	Skills in demand
Palling and unit managers	Communication
Instrumentation & geotechnics	Leadership
Machinery technicians	Analysis & synthesis
Heavy machinery operators	Aptitude to perform job
Project managers	Emotional intelligence
Accountants	Proficiency in English

Difficult vacancies to fill and skills in demand in Peru’s mining sector. Source: [Austrade 2019](#)

## > Education

School / Level		Grades	Age	Years
Primary	Primary	1-6	6-12	6
Secondary	Secondary	7-11	13-18	5
Vocational	Title of Technical Professional	-	12 - 14	3
Tertiary	Professional Bachelor's	-	-	4
	Academic Bachelor's	-	-	4-6
	Master's	-	-	2
	PhD	-	-	2

Education system in Peru. Source: [Scholaro.com](https://www.scholaro.com)

Education is compulsory from grades 1-11, and there are more than [8 million](#) students in basic education, 80% (6.4 million) of whom attend public schools. Around 98% of Peruvian children aged 5-14 are in school; however, UNESCO figures ([2019](#)) suggest that up to 22% of children in this age group are also working, mostly (64%) in agriculture, but also in services (30%).

Higher education enrollment in Peru grew faster than in any other Latin American country between 2008 and 2018, with numbers more than [doubling](#) from 775,000 to 1.6 million. Similar growth was seen in the number of universities active in Peru, and

between 2000 and 2019, the number grew almost twofold, from 74 to 139. A policy of minimal governmental interference allowed a [great increase](#) in lower-quality for-profit models, and presents a quality assurance headache. Peru has had several Ministers for Education since 2019.

A 2019 [report](#) from SUNEDU (the National Superintendency of University Higher Education) reported that 53% of Peruvian university students were enrolled in courses in the field of social sciences, followed by engineering and technology, accounting for 28% of enrollments.

## > English Proficiency

Peru ranks 51 out of 111 countries according to the [EF English Proficiency Index 2022](#), placing the country in the 'Moderate' category and ranked 10 of 20 in Latin America. Proficiency is relatively evenly distributed between genders and age groups; those aged 21-25; 26-30; and 31-40 are all rated at 'Moderate' English speakers, while 18-20-year-olds and over-41s score in the 'Low' category.

A [2022 survey](#) by the Maple Bear Network of Canadian Schools suggested that only 4% of Peruvians are fluent in English. Peru's National

Curriculum for Basic Education prioritises the development of skills related to English as a foreign language, and a National English Language Policy was established in 2015 with a goal of achieving English-Spanish bilingualism by 2021. At the time, a [British Council](#) study showed that 57% of Peruvians students studied English in secondary school, 46% did so during university, while 41% attended private language schools. A [memorandum of understanding](#) was signed with the UK in 2015, and engagement included English language summer schools, but the



programme was deprioritised in 2019. There are 25 ‘High Performance Schools’ (COAR) located around Peru, offering intensive English training and the IB curriculum for free to high performing students “aimed at enhancing those abilities and promoting their commitment to local, regional and national development.” The Ministry of Education opened [2,677](#) spaces for new students in the 2023 academic year.

Analysis of the [top ten destinations](#) for internationally mobile third level Peruvian students shows that 16% (5,239 students) go to English speaking countries, indicating that there is a flow of English speaking students in Peru that seek international university studies.

City	EF Proficiency Score	EF Proficiency Level
Lima	539	Moderate
Cuzco	518	
Arequipa	508	
Trujillo	504	

### > Internet Penetration

National statistics entity INEI [reported](#) that 73% of Peruvians over the age of 6 had internet access in the first quarter of 2022, with considerable regional variance. While 86% of those living in capital city Lima were online, only 76% had internet access in other Peruvian cities, and a mere 41% could access the web in rural areas.

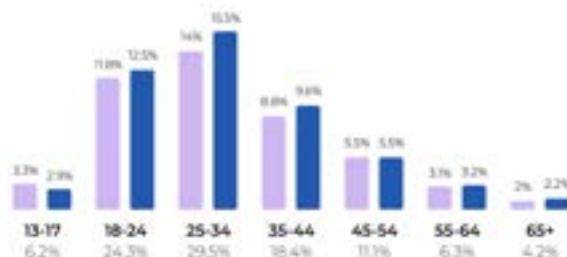
Government statistics show that in 2021, 39.4% of households had access to a fixed internet connection, while 49.4% had access to a computer. The vast majority of Peru’s internet users live within its urban regions, particularly in Lima, the nation’s capital, where 95% of households were online in 2021.

### > Social Media Use

A 2021 [study](#) by Ipsos reported almost fourteen million (13.8) users of social media, aged 18- 70, in urban parts of the country. The most popular platforms were Facebook, WhatsApp, YouTube, Instagram and Messenger. Tik Tok, Snapchat and Instagram showed the greatest year-on-year growth. The report suggested that Tik Tok as the best channel to publicise promotions in Peru, Facebook for comments on user experiences of frameworks or products, and YouTube for recommendations.

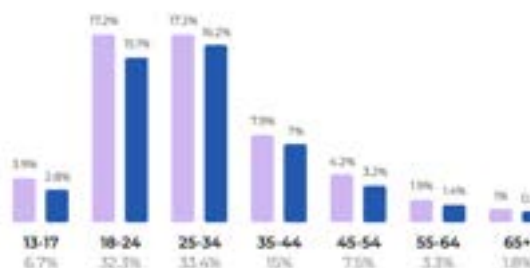

Social network	Peruvian users
Facebook	27,122,100
Instagram	9,283,100
LinkedIn	7,529,000

Number of Peruvian users of social networks in December 2022. Source: [NapoleanCat.com](#)

 Facebook users  
2022

 27 122 100

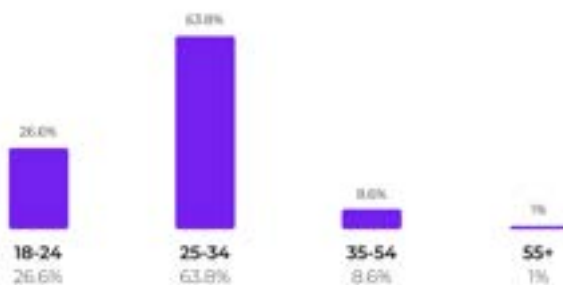

 48.6%  
Women

 51.4%  
Men

 Instagram users  
2022

 9 283 100

 53.5%  
Women

 46.5%  
Men

 LinkedIn users  
2022

 7 529 000

# Student Mobility

[UNESCO data](#) show that Peru has more than 35,000 third level students studying abroad, with Argentina the most popular destination receiving more than half (51%). The United States is the next most popular destination, receiving around 3,400 students (10% of

Peru’s internationally mobile third level students). An affinity towards Spanish speaking countries is clear, and 68% of students choose countries where tuition is offered in the language.



Global Flow of Tertiary-Level Students from Peru. Source: [UNESCO](#)

#	Destination country	Destination country Number of mobile third level students	Percentage of all mobile third level students
1	Argentina	17,964	51%
2	United States	3,398	10%
3	Spain	3,106	9%
4	Chile	2,681	8%
5	Brazil	1,468	4%
6	Germany	1,341	4%
7	France	959	3%
8	Australia	671	2%
9	United Kingdom	612	2%
10	Canada	558	2%
<b>Sum of Top 10</b>		<b>32,758</b>	<b>95%</b>
<b>English Speaking in Top 10</b>		<b>5,239</b>	<b>16%</b>
<b>Overall Total</b>		<b>35,379</b>	<b>100%</b>

Top ten countries receiving third level students from Peru. Source: [UNESCO](#)

# Looking to the Competition

## > United States

The United States is the second most popular destination for Peruvian students, and the most popular anglophone destination, attracting 10% of all third level international mobile students. US Department of Trade figures show that nearly half (47%) of Peruvian students in the US are studying at undergraduate level; 31% are postgraduate students; 6% are pursuing non-degree

programmes; while 15% are completing OPT (Optional Practical Training). Unusually for the region, Peru's internationally mobile numbers to the US did not suffer during the global pandemic, which is understood to be due to an increase in institutional partnerships, and a flexibility that allowed students to begin their studies online while travel restrictions were in place.

Academic Level	Number of students	% of Peruvian students	% change (2020 to 2021)
Undergraduate	1672	47%	0.7%
Graduate	1107	31%	-2.6%
Non-Degree	232	6%	3%
Prácticas Profesionales	545	15%	4%
Total	3556	100%	-

Peruvian students in the US by academic level, and percentage change Year-on-year. Source: [US Department of Trade](#)

Year	Number of Peruvian Students	Year-on-year change
2015	2763	-
2016	3268	18%
2017	3200	-2%
2018	3253	2%
2019	3409	5%
2020	3647	7%
2021	3566	-2%

Peruvian students in the US 2015 - 2021, and percentage change Year-on-year. Source: [US Department of Trade](#)

US Institution Type	%
Associates Colleges (Two Years)	9%
Baccalaureate Colleges (Four Years)	4%
Masters Colleges & Universities	9%
Doctorate Granting Universities	73%
Special Focus Institutions	4%
Public Institutions	56%
Private Institutions	43%

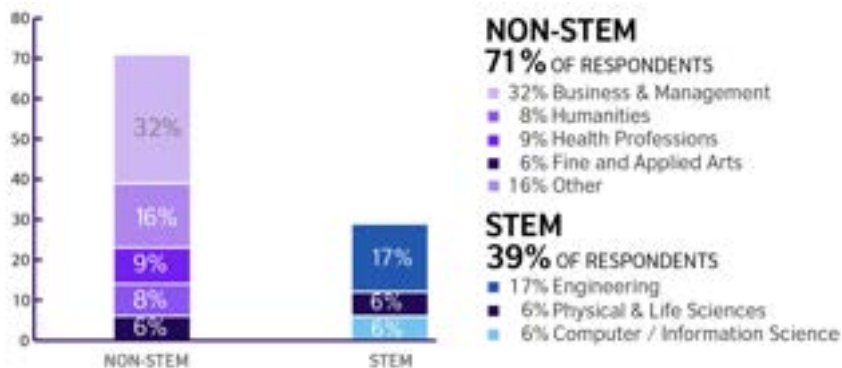
PeruviaRnepsuttuadioenftosr iltethndeedUSSebgryreeUS institution type. Source: [US Department of Trade](#)

## Top 5 Influencers

Most Important Factors When Selecting a University in the U.S.:



Top 5 influencers for Peruvian students when choosing a university in the United States. Source: [Intead 2019](#)



Programme interests among Peruvian students. Source: [Intead 2019](#)

Social Network	Number of followers	Average engagement
EducationUSA Perú		
<a href="#">Instagram</a>	11,500	382
<a href="#">Facebook</a>	44,095	56
EducationUSA mundial		
<a href="#">Instagram</a>	107,000	-
<a href="#">Facebook</a>	475,000	-

ocial media presence of EducationUSA in Peru, with number of followers and average audience engagement on ten posts.

[EducationUSA](#) has ten student advice centres located in Peru (Arequipa, Chiclayo, Cusco, Huancayo, Ilo, Lima (2), Piura, Tacna, Trujillo), offering free orientation on topics like admissions requirements, financial support, how to choose a programme, the student process, and preparation for students exams. EducationUSA works closely with Peru’s elite public schools (COAR), dotted around the country. Each of the EducationUSA advice centres in Peru has its own Facebook page, and the national pages have reasonable engagement, with Instagram attracting more attention. Messaging focuses on practical tips for applying to the US, scholarship announcements and general information regarding US states. A short reel on Instagram with a Peruvian student that receives US financial aid was watched 2083 times.

## > Canada

While the number of Peruvian students travelling to Canada for study purposes were relatively low before the global pandemic, and dipped by 35% in 2020, the recovery has been remarkable, with a massive 275% increase in students numbers in 2021.

EduCanada does not have a Peru specific page, and uses its global social media presence to promote the Canadian offer. Despite having many more followers on Facebook, better engagement can be seen on Instagram. Social media messaging focuses on scholarship offers, profile posts on individual colleges (including details of their support services), and graduate employability, while wider governmental messaging focuses on security and quality of life. Canadian colleges offer a cheaper and shorter alternative to traditional universities, and many have representatives covering Spanish speaking countries in the region.

The [Canada-Peru Chamber of Commerce](#) is very active in the education space in Peru, and along with listing a number of Canadian colleges among its education [partners](#) (registration costs USD \$450, and an annual fee of USD \$540 is payable), the entity also works with recruitment platform ApplyBoard. The organisation arranges academic visits to Canada, education missions to support institutional partnerships, along with a range of education related webinars promoted on its site. In October 2022, for example, the following webinars were offered: 'The experience of being an international students at George Brown College' with a Peruvian

graduate; 'University Canada West | The role of Canadian universities in economic growth'; 'Fanshawe Global, the strategic ally in capacity building'; among others.

Year	Number of Peruvian students	Year-on-year change
2015	285	-
2016	395	39%
2017	495	25%
2018	560	13%
2019	685	22%
2020	445	-35%
2021	1,670	275%
2022	3,200	52%

Peruvian study permit holders in Canada 2015 - 2022. Source: [IRCC](#)

Social Network	Number of followers	Engagement
EduCanada (Global)		
<a href="#">Instagram</a>	3,727	47
<a href="#">Facebook</a>	72,000	30
<a href="#">LinkedIn</a>	3,693	6

Social networks used by EduCanada; number of global followers; average level of engagement on ten posts..

## > Australia

UNESCO [figures](#) for globally mobile third level students suggest that Australia enjoys 2% market share from Peru. Meanwhile, Australian data shows Peru is its 41st largest source market for international students. One third of Peruvian students in Canada are completing language programmes, while 41% are enrolled in vocational (VET) programmes and Australian [VET providers](#) have engaged with mining companies in Peru to provide certified training in mining labour and health and safety skills.

Under a 2020 free-trade agreement between the two countries (PAFTA), Peru agreed to encourage competent authorities to recognise higher education qualifications from Australia, as well as a concession that allows Peruvian students to complete studies partly in Australia with the remainder online in Peru, and opened the door for Australian providers to establish campi the the South American country, albeit within certain quotas.

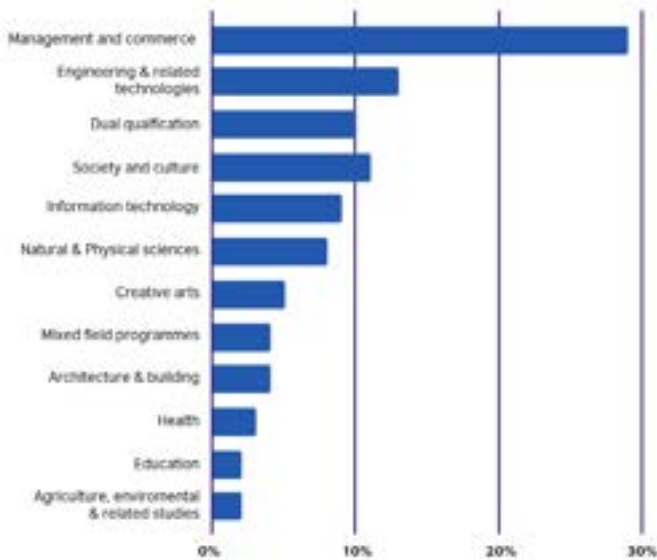
A quarter (25%) of Peruvian students in Australia are completing higher education programmes, with 62% of those pursuing postgraduate qualifications. Business programmes are most popular, accounting for 29% of Peruvian higher education enrolments in Australia in 2022; followed by engineering programmes, the choice of 13%. Third level courses in the area of society and culture was the choice of 11% of Peruvian students in Australia; 9% chose programmes in the area of information technology; while 8% chose to study natural & physical sciences.

Year	Number of Peruvian students	Year-on-year change
2015	1,063	-
2016	1,077	1%
2017	1,139	6%
2018	1,292	13%
2019	1,402	9%
2020	1,269	-9%
2021	1,067	-16%
2022	1,322	24%

Peruvian students with student visas in Australia 2015 - 2022, and Year-on-year change. Source: [Australian Government Department of Education](#)

Provider	Student numbers	Percentage
VET	676	41%
ELICOS	535	33%
Higher Education	411	25%
Schools	12	0.7%
Non-awarded	<5	-

Enrolment numbers in Australia from Peru January - October 2022. Source: [Australian Department of Education](#)



Peruvian higher education enrolments in Australia by field of education, January - October 2022. [Australian Department of Education](#)

A region wide campaign managed by Austrade saw the launch of the ‘[Study Australia Experience](#)’ platform January 2022 offering Spanish content relating to scholarships, individual profiles for Australian institutions, and a search engine to help students identify where specific courses are offered. A regional [communications campaign](#) with targeted advertising reached 20 million prospective students in the region in the first six months; bringing 310,000 thousand visitors, and 37,000 registered users to the platform in the first six months. Dozens of live events were held in the region to promote Australia as a destination and its education institutions, involving alumni ambassadors, university representatives and education agents, and a three hour virtual fair was held in June 2022 for 1,700 prospective students. Events and webinars on the platform are offered in Spanish to cater for the wider Latin American student community.

In 2021, Austrade invited Australian institutions to meet with IB schools across Latin America, and the team proactively supports PRONABEC, with events to increase Australia’s market share of outbound students availing of this education loan, as well as liaison with BCP

bank. The Australian embassy organises education [events](#) where hot leads from the platform are invited along with pre-departure students, agents, local scholarship entities, and in-market representatives.

Study Australia Experience has a Latam presence on Instagram and Telegram, where the most recent ten messages were viewed an average of 421 times. Austrade maintains a global presence on Facebook and Instagram ‘Study Australia’ profiles.

Social network	Number of followers	Engagement
<b>Study Australia Experience - Latam</b>		
<a href="#">Instagram</a>	10,800	118
<a href="#">Telegram</a>	1,174	-
<a href="#">Instagram</a>	37,200	-
<a href="#">Facebook</a>	366,000	-

Social networks used by Study Australia Experience; number of followers; average level of engagement on ten posts.



## > United Kingdom

The United Kingdom is the ninth destination of preference for Peruvian students, according to [UNESCO](#) figures, and is ahead of Canada in terms of third level students. The UK did not suffer much regarding student numbers during the pandemic, and actually saw numbers grow by 25% in 2020, potentially due to students being able to commence courses online while travel restrictions were in place. More than half (51%) of Peruvian students in UK universities are completing undergraduate programmes; while just over a third (33%) of third level students from Peru choose London as their study destination.

Social Network	Number of followers	Engagement
<b>British Council Perú</b>		
<a href="#">Facebook</a>	77,293	28
<b>British Council (global)</b>		
<a href="#">Facebook</a>	2,400,000	-
<a href="#">Instagram</a>	182,000	-
<b>StudyUK_britishcouncil (global)</b>		
<a href="#">Instagram</a>	92,000	-
<b>Study UK - British Council</b>		
<a href="#">Facebook</a>	628,880	-

Social networks used by British Council Peru; number of followers; average level of engagement on ten posts.

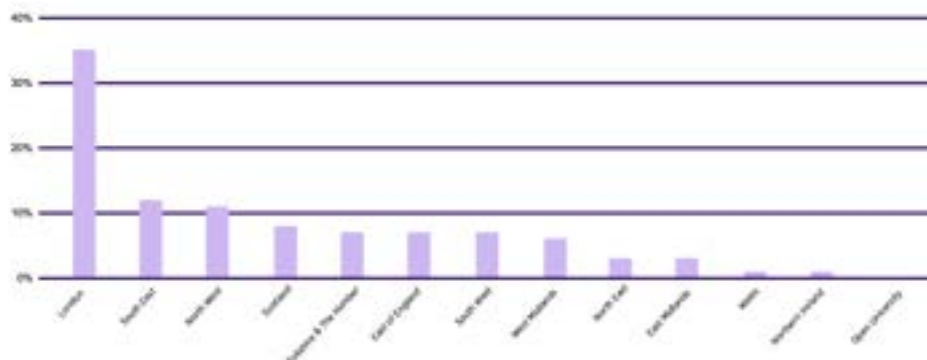
Year	Number of Peruvian students	Year-on-year change
2015	290	-
2016	380	31%
2017	415	9%
2018	495	19%
2019	490	-1%
2020	615	25%
2021	605	-2%
2022	N/A	-

Peruvian higher education students in the United Kingdom 2015 - 2021. Source: [HESA](#)

Postgraduate (research)	10%
Postgraduate (taught)	38%
First degree	49%
Other undergraduate	2%

Level of study: Peruvian higher education students in the UK 2020/21. Source: [HESA](#)

It would appear that the only British Council unique social media for Peru is on Facebook, and despite having more than 77 thousand followers, average engagement on posts is 28 (based on the last ten posts on the page). Interestingly, the most popular recent post related to a British Council webinar, which attracted 235 engagements, including 37 shares. This indicates that students will engage more when the content is interesting and relevant to them.



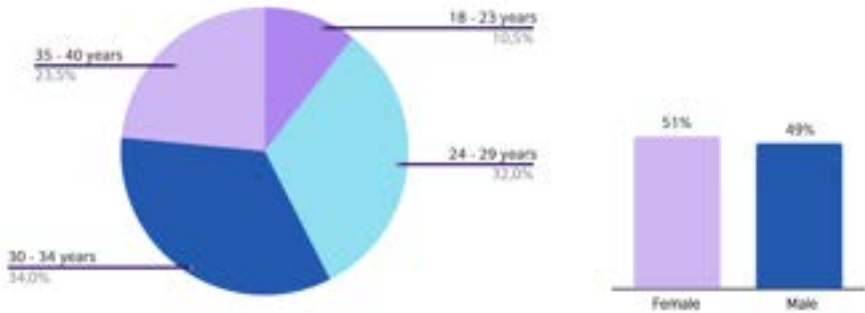
UK region where Peruvian higher education students are studying 2020/21. Source: [HESA](#)

## Exclusive Survey

# Student Snapshot Peru

An exclusive survey was completed by 200 Peruvians in January 2023 on behalf of the British Council. Survey respondents were aged from 18 - 40 years, with 10% aged 18 - 23 years; 32% from 24 - 29 years; 34% aged 30 - 34 years; and 23% were aged 35 - 40 years. Most (87%) answered the survey on a mobile

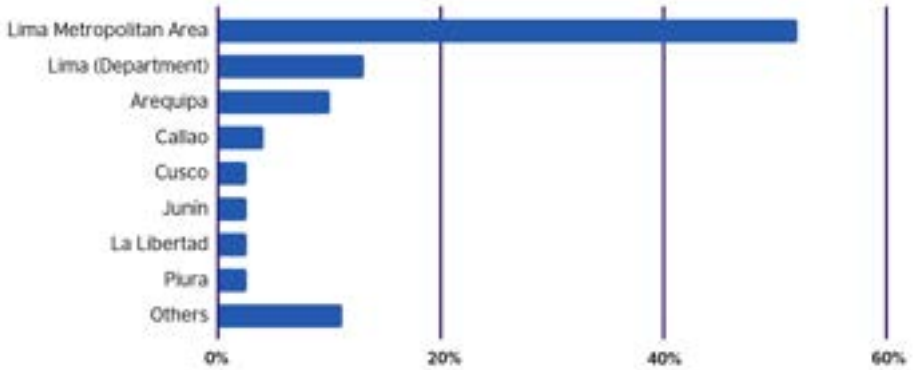
phone or other handheld device, while the remainder responded on desktop computers, and 51% of the sample were female. This was a paid target audience survey applied using the Survey Monkey platform, and it was not possible to collect contact details for students.



Age profile and gender of respondents to Brazil survey. Source: British Council Peru Survey by SOS Education Consultancy

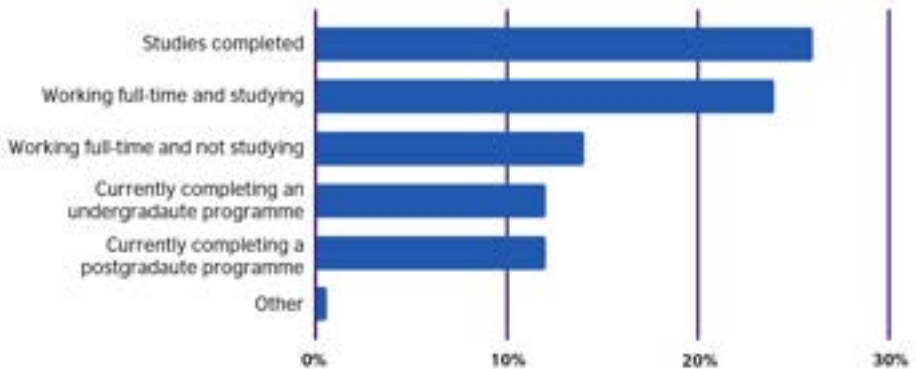
Rather than selecting the precise location in Peru for survey respondents, the family income was selected to include those with earnings of at least PEN 4,501 per month, equivalent to around GBP £985. It was considered that this would help to identify locations outside of capital city Lima where wealthier Peruvians are located and assess their opinions. Responses were received from 20 Peruvian departments, with 65% located in Lima; 10% in Arequipa; and 4% in Callao.

Most Peruvian students (61%) said they would like to receive information about study abroad by email, 16% would prefer to get material by regular post, 11% said WhatsApp was a good channel, 7% were happy to be informed via social media, while just 1% said they would like to get messaging either through webinars or through events in their city.



Department in Peru where respondents are located. Source: British Council Peru Survey by SOS Education Consultancy 2023

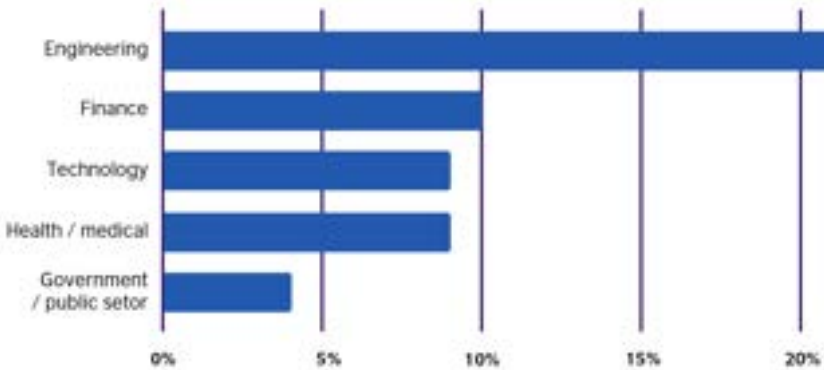
### > Estado actual de estudios



Current study status of respondents to Peru survey. Source: British Council Peru Survey by SOS Education Consultancy 2023

Half (48%) of the survey respondents are currently studying. Of these, half (50%) are working full-time while studying, 24% are completing a postgraduate programme, and further 50% are completing an undergraduate programme. Just over one quarter of survey respondents (26%) said their studies were complete, while another 14% are in the workplace and not currently studying.

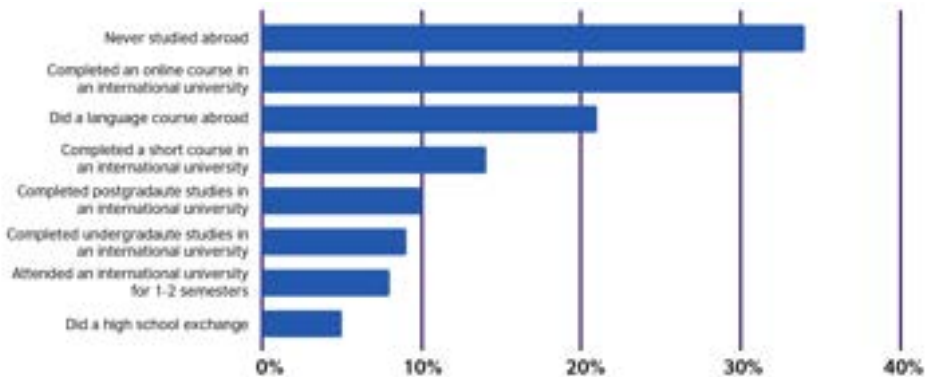
## > Future Career Aspirations



Which of these sectors best describes where you want to pursue your future career? Top five responses. Source: British Council Peru Survey by SOS Education Consultancy 2023

Engineering was a clear favourite and the most popular future career area for 22% of the sample group; followed by finance (10%); health and technology (9%, respectively); marketing (5%), and the public sector (4%).

## > Have you ever studied abroad?



Have you ever studied abroad? (select up to three answers). Source: British Council Peru Survey by SOS Education Consultancy 2023

Nineteen of the survey respondents (9%) completed their undergraduate studies in an international university. Of this subset, 32% also completed postgraduate studies in a foreign country and 21% completed an online course in an international university. None went on a high school exchange, but 21% completed an international languages programme. Three of ten Peruvians (30%) had completed an online course in an international university.

Twenty (10%) of the survey respondents completed an international postgraduate programme, seven of whom (35%) also completed an online course as an international university, along with two with experience of a high school exchange programme and four that completed an international language course.

## > Have you ever considered studying in a UK university?

I believe that study in the UK would greatly improve my career prospects	36%
I have heard great things about UK education	30%
It is my dream to study in the UK	26%
I would like to complete studies online in a UK university	24%
I could only go if I won a scholarship	17%
I would need to improve my English a lot	15%
I would study in the UK if there was a loan available that I could repay after graduating	14%
I have never thought about studying in the UK, but I would consider it	13%
It is my dream to study abroad, but I never considered the UK	10%
Study in the UK is too expensive for me	5%
I have never heard much about studying in the UK	4%
I have no interest in studying overseas	1%
I would not like to travel so far from home	0,5%
Other	1,5%

Have you ever considered studying in a UK university? (select up to three responses)  
 Source: British Council Peru Survey by SOS Education Consultancy 2023

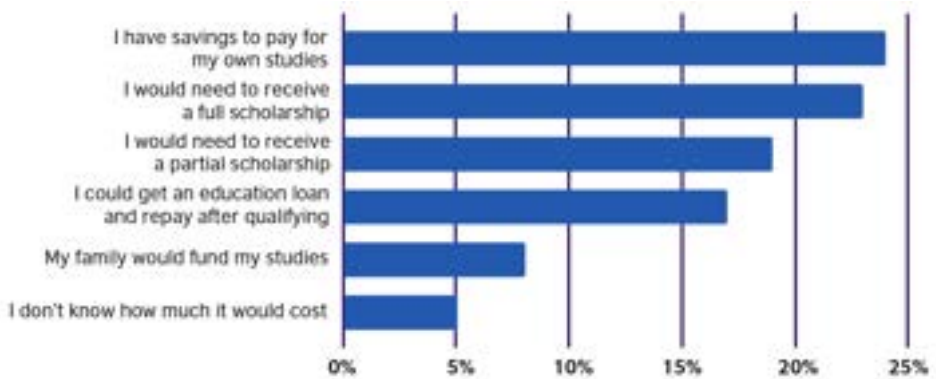
A desire to study online in a UK university was stated by almost a quarter (24%) of overall survey respondents in Peru (in a separate question, 30% confirmed they had already complete online studies in an international university). One quarter (25%) of survey respondents said it was their dream to study in the UK; with 43% of those people believing that UK study would greatly improve their career prospects; and 27% of those having heard

great things about UK education; along with 14% noting that they would have to improve their English first. Of those with a UK study dream, 16% said this would only be possible with a scholarship, and 12% said a study loan would be necessary. Only one of this subset said that they considered study in the UK to be too expensive. One-fifth of this group are interested in completing an online course in a UK university.

Many in Peru were of the opinion that study in the UK would greatly improve career prospects, and this response was selected by 35% of survey respondents; 42% of them reported

having heard great things about UK education; while a quarter of the subset stated an interest in completing an online course from a British university.

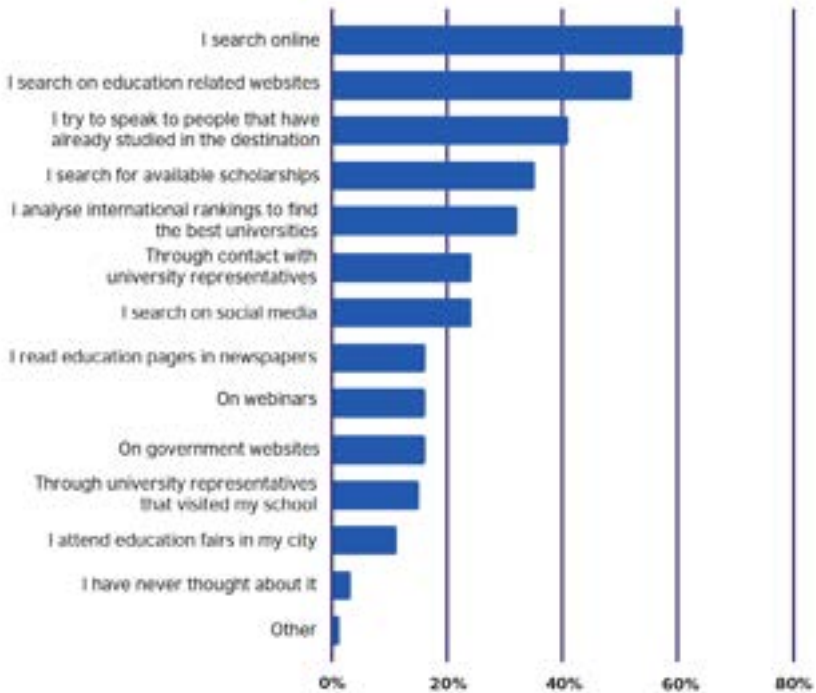
## > How would you fund your overseas studies?



If you were approved to study abroad, how would you fund your overseas studies? Source: British Council Peru Survey by SOS Education Consultancy 2023

Nearly one third (32%) of students in Peru reported that they would not need external financial support in order to study overseas - 24% of survey respondents said they have their own savings, while a further 8% said their family would cover the costs. A quarter (23%) said they would need a full scholarship if they were to study in a foreign university, 17% would need a partial scholarship, while 19% said they could get an education loan to repay after qualifying. One in twenty (5%) said they did not know how much it would cost to study overseas.

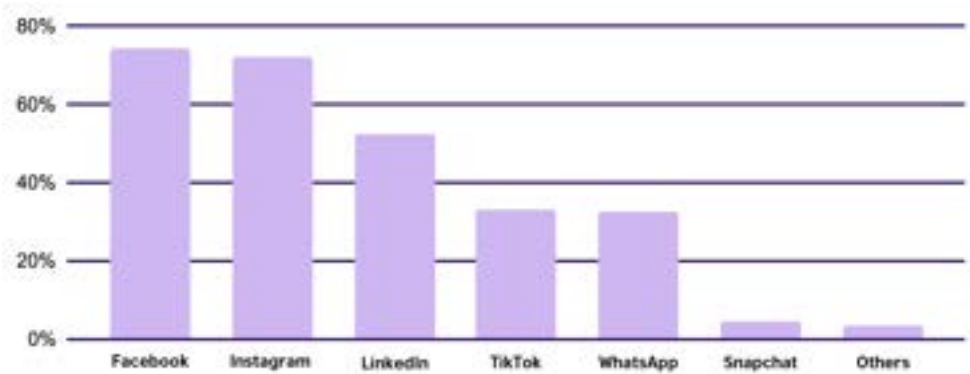
## > Best information source about overseas study?



Where would you look for information about overseas study? (choose top 5)  
 Source: British Council Peru Survey by SOS Education Consultancy 2023

The internet was the most popular means of finding further information, cited by 61% in Peru. More than half would go directly to education related websites (respondents could select up to five answers to this question), 41% would try to speak to alumni from the destination they were considering, while 35% would hunt for scholarships, and 32% would analyse international rankings. A quarter (24%) would search on social media, and the same proportion would get in touch with university representatives. Webinars, education pages in newspapers, and government websites were cited by 16% of survey respondents, respectively. Only one in ten (11%) said they would attend education fairs, while 3% had never thought about it.

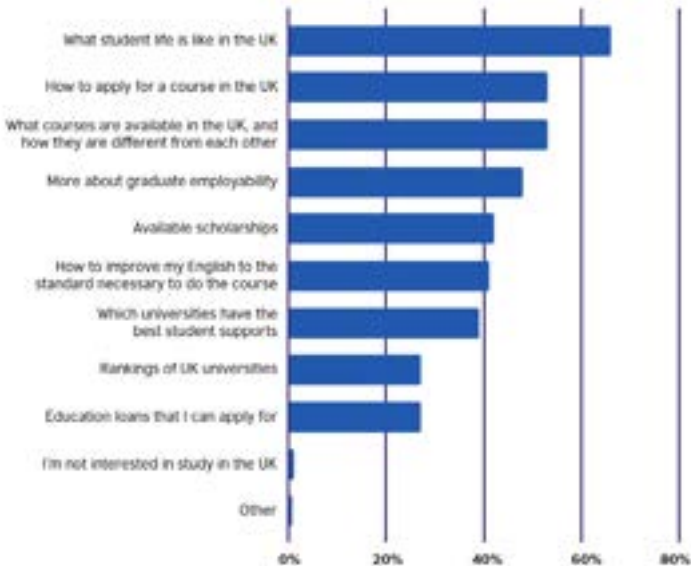
### > Best social media for study abroad?



What social media would you use to find out more about study opportunities?  
 Source: British Council Peru Survey by SOS Education Consultancy 2023

Facebook emerged on top as the best social media platform for information regarding study abroad, cited by 74% of Peruvian survey respondents, followed closely by Instagram, mentioned by 72%. One third (33%) saw Tik Tok as a good option, and 32% said they would use WhatsApp to find out about study abroad opportunities.

### > What do you want to know about study in the UK?

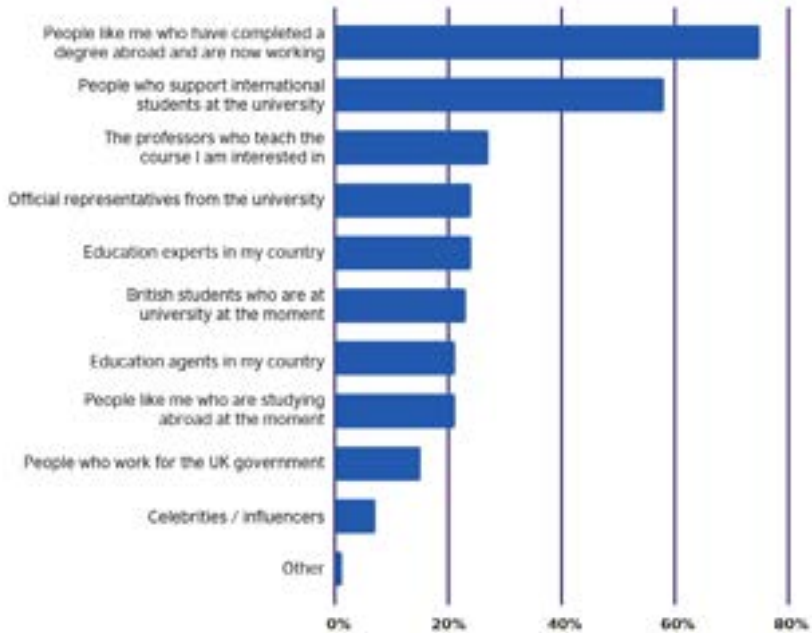


What would you like to learn more about study in the UK? (choose all that apply) Source: British Council Peru Survey by SOS Education Consultancy 2023



What student life is like in the UK is the greatest curiosity for 66% of Peruvians, while more than half want to know practical things like how to apply for a course (53%) and what variety of courses are available in the UK (53%). Rankings were cited as being of interest by 27%, while 42% want to know about scholarships, and 27% want to know about available loans. Improving proficiency in English was a priority for 41%, who want to know how they can improve to the standard necessary, while 39% want to know what support will be available to them on campus in the UK.

### > Trustworthy information sources



If I look for information about studying abroad, I most like to hear from (choose 3)  
 Source: British Council Peru Survey by SOS Education Consultancy 2023

Alumni voices resonate and Peruvians don't just want to hear from people that are studying in the UK (cited by 24%), they value the experience of graduates that have since accessed the workforce - this was cited by three quarters (75%) of survey respondents. Peruvians also want to connect with university personnel, both the student support officers (cited by 58%) and the academic staff (a preference for 27%). A quarter of Peruvians (23%) would like to hear from education agents in their country, 21% are interested to hear what local education experts have to say, 15% want to hear from people that work for the UK government, while just 7% value influence or celebrity voices for study abroad information.

## Exclusive Survey

# Agent Snapshot Peru

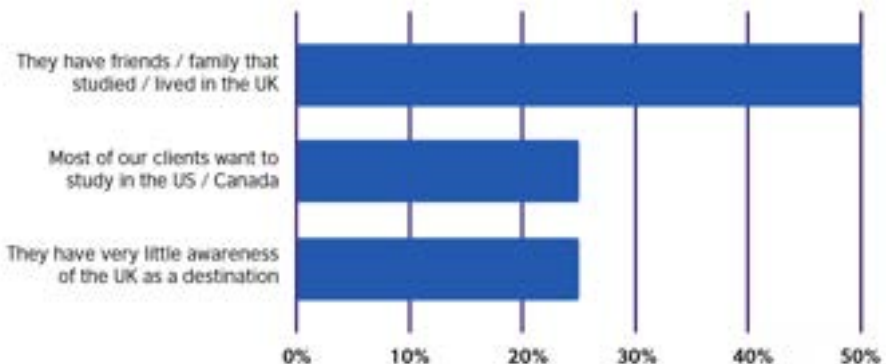
A survey was sent to a number of agencies that operate in Peru during January 2023, and four agencies responded. Half of the agents (50%) said demand for courses in the UK had increased following the global pandemic, while the other half (50%) said they noted a decrease in enquiries. Most agencies (75%) said that they would like to receive updates and information via email, while one agent would prefer to get such messaging by WhatsApp.

Three of the agents in Peru said that 100% of their students were self funded, while one confirmed that 69% of clients are funded either with their own funding, or paid for by family, with 1% receiving a full scholarship, and 30% on partial scholarships. Despite saying that all of their students were self-funded, one agency noted that they work with commercial bank BCP (Banco de Crédito del Perú). Another

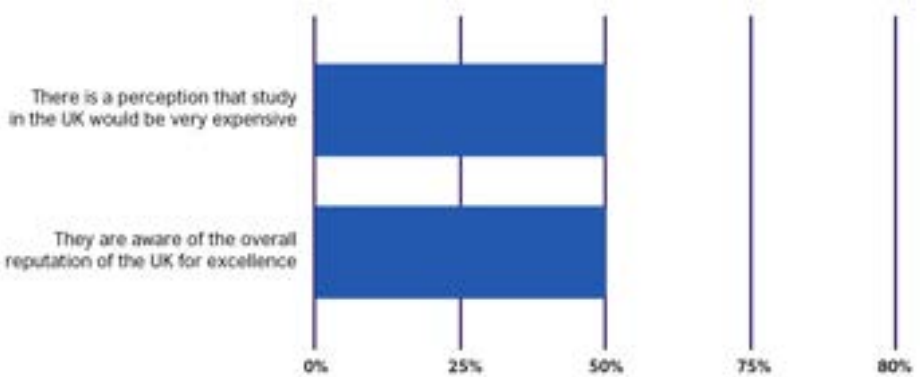
agency with an administrative base in Bolivia but operating in Peru, said that a IELTS test centre is needed in Bolivia, while another Peru-based agency said more IELTS UKVI (UK Visas and Immigration) dates were needed.

Half of the agents in Peru (50%) said their clients have some reference regarding the UK as a country from family or friends that had spent time there, one agent said their clients had a natural preference for study in the US or Canada, while another said their clients had very little awareness of the UK as a destination. Half also said their clients are aware of the overall reputation of the UK for excellence, when asked about clients' awareness of the UK as a study destination, while the other half said their clients believe that study in the UK would be expensive.

## > What do your clients know about the UK as a country?



### > What do your clients know about the UK as a study destination?

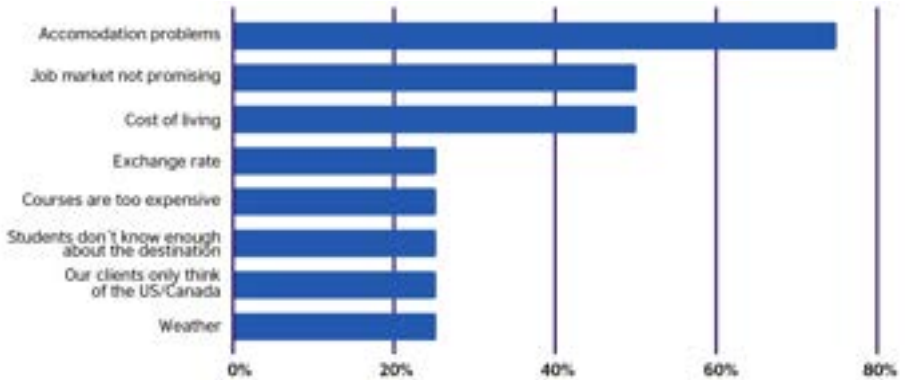


### > What motivates your clients in their choice of institution?

Reason	Proportion of agents citing reason
Opportunities to enter the workplace after their studies are complete	100%
International rankings	75%
Cost of course	75%
Cost of living	75%
Permission to work while studying	75%
Quality of teaching	25%
Quality of life	25%
Salary expectations	25%
Weather	25%

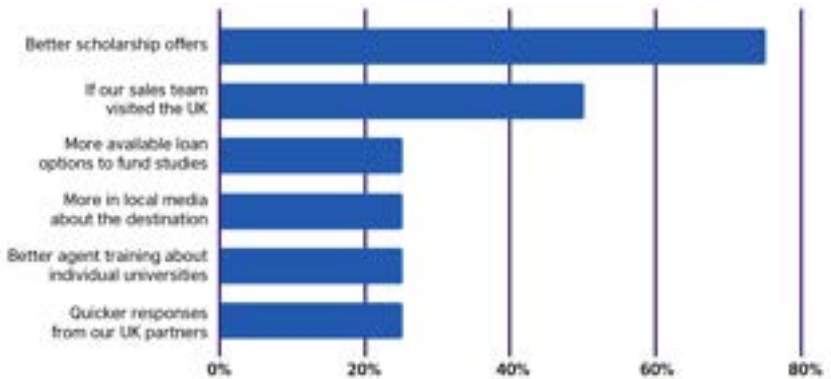
The main motivator for Peruvians to choose a specific study abroad institution is around opportunities to enter the workplace after their studies are complete and this was cited by all agents in Peru that responded to the survey, while 75% listed international rankings, cost of course, cost of living, and permission to work while studying as primary motivators.

## > What are the main challenges to third level study in the UK?



The main challenge to third level study in the UK, according to Peruvian agents, is problems regarding accommodation, and this issue was raised by 75% of respondents. For half of the agents (50%), an employment market that is not promising, and the cost of living represent main challenges to choosing the United Kingdom for overseas study. Three quarters (75%) of Peruvians agents said that better scholarships offers might cause demand to increase, while half (50%) said there may be more demand if their sales teams visited the UK.

## > What might cause demand to increase?



## > What would help you to sell more UK higher education products?

More scholarships	100%
Familiarisation trips to visit British universities	75%
Quick responses from UK partners	75%
Better training regarding the UK as a destination	50%
Clear immigration information	50%
Identification of unique selling points for each university	50%
Relevant employability statistics	50%
Clear salary scales / expectations for graduates	25%
Strong alumni testimonials	25%

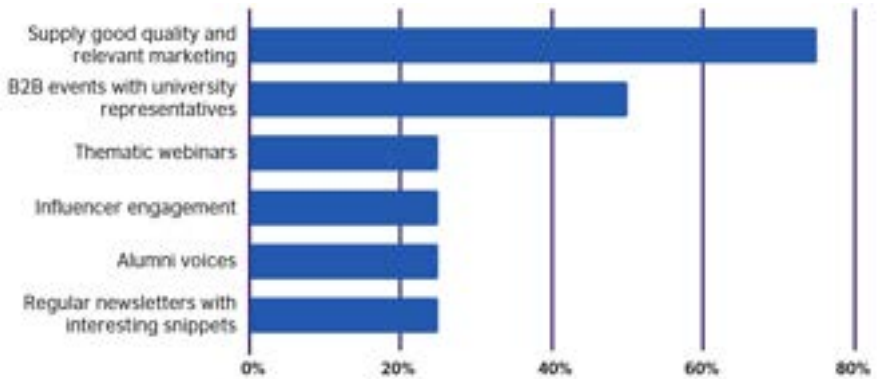
More scholarships for Peruvian students to study in the UK would help agents in the market to sell more UK higher education products was the unanimous reply received (100%). Most agents (75%) also said that familiarisation trips to British universities would help increase sales, with the same proportion asking for quicker responses from partners in the UK. Half of the agents in Peru (50%) want better training regarding the UK as a destination, as well as identification unique selling points for each university, clear immigration information, and relevant employability statistics.

## > How do your university-bound students fund their studies?



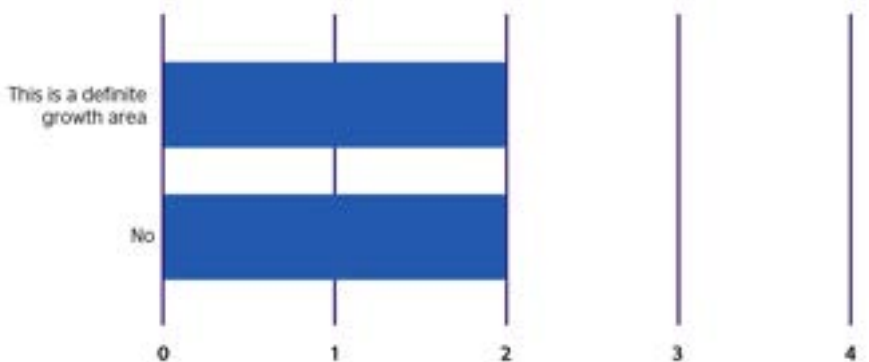
The vast majority (92%) of university-bound students in Peru are self-funded, according to agents in the market, with 75% of agents saying all of their students are self-funded.

## > How can the British Council support your agency to increase applications?



Peruvian agents would like a supply of good quality and relevant marketing material in order to better promote the UK as a third level study destination, and this demand was cited by 75% of survey respondents. Half of the agents also highlighted a desire to have B2B events with university representatives, while thematic webinars, regular newsletters with interesting snippets, alumni voices, and influencer engagement were requested by 25%, respectively.

## > Do you see a market for an online offer from UK universities?



Agents in Peru were split down the middle in terms of their opinions on a potential market for an online offer from UK universities in the market, with half (50%) saying that this is a definite growth area, and the other half saying they did not think so.

# Peru Analysis

UNESCO [figures](#) suggest that Britain is the 9th most popular destination for internationally mobile third level students from Peru, the third most popular English speaking destination, after the United States and Australia, and more popular than Canada. However, a market share of 2% can surely be improved upon.

Australian numbers dropped both in 2020 and 2021, due to extended border closures, but immediate recovery was witnessed in 2022. The recently signed trade agreement between the two countries will pave the way for even more growth, with the possibility of Australian institutions opening a campus in Peru, and the potential for recognition of Australian qualifications there.

While the number of Peruvians with study permits in Canada dipped by 35% in 2020 during the global pandemic, the recovery was exceptional, and numbers grew by 275% the following year. An active bilateral Chamber of Commerce, offering a range of practical webinars with partner colleges, and engaging with EdTech ApplyBoard may account for this some of this growth. The number of Peruvians studying in the US was not adversely affected by the pandemic, and numbers continued to grow during this period, testament to the flexibility that allowed students to register in US institutions and begin studies without yet travelling north.

A relatively low response rate by agents in Peru compared to other markets in the region is reflective of a less-active agent scene on the ground. However, it is reassuring to note that agents in Peru work mostly with higher education, have a high proportion of self-funded clients, and list the UK as a top destination. Nearly one-third (32%) of Peruvians reported that they could fund their own overseas studies, either with savings or with help from their families.

Agents in Peru reflected that course prices and cost of living were important to their clients. This assertion was backed up by [62%](#) of Peruvian students choosing a US university in 2019, but not in the findings of this study, with only 5% of students saying study in the UK was too expensive for them (although 17% said they would need a scholarship and 14% said they would need a loan). In a separate question, the same proportion (5%) indicated that they did not know how much such a UK study would cost.

There may not be sufficient provision of UKVI IELTS testing in Peru, with just [one](#) venue offering the test, and with just one day and time-slot available per month. While it is not clear how many students can take the test per day, at least one agent said more test dates were needed (while another agent wanted a test centre available in Bolivia).

Most Peruvians have positive impressions of Britain as a study destination. More than one-third (35%) thought study in the UK would greatly help their career prospects, and only 4% had not heard much about studying in the UK. Students in Peru want to hear alumni voices, specifically those that have already entered the workplace. Meanwhile, all agents agreed that post-study employment opportunities were a primary motivator for students in Peru, noting concerns regarding the current UK job market.

Engineering was the most popular future career area in survey results, cited by 22%, a preference reflected by 13% Peruvian higher education students in Australia, and 17% of US-bound students. Finance was the second favourite top future career choice for respondents to this student survey (chosen by 10%), and is worth promoting, considering management and finance courses are pursued by 29% of Peruvian higher education students in Australia, and desired by 31% choosing US universities.

One-quarter of Peruvians students are interested in completing online studies in a UK university, and 30% have already completed an online course in an international university, although the duration of courses completed is not known. Although not all agents in Peru saw much potential for an online offer from UK universities, it is certainly an area worth investigating. However, before planning to launch an online offer in Peru, it is important to understand the local scenario regarding recognition of qualifications, which falls outside the remit of this report.

British universities are engaged in Peru, with 48 UK universities approved by SERVIR (offering scholarships for public sector workers), and 58 approved by scholarship provider PRONABEC. While British universities

comprise 8% of approved universities, 15% of scholarships awarded in 2022 were for UK-bound students. This is a very positive achievement, but there is always room for improvement. Partner universities have an opportunity to meet with prospective students at an annual event offered by PRONABEC, normally in September. The event has been online in recent years, yet only 11 UK universities participated in [2022](#). It is not clear how much British universities are doing to promote their offer in Peru.



# Recommendations

## > High-level engagement

- Engagement with the Ministry of Foreign Trade and Tourism is recommended to ascertain skills deficits that may be addressed by an offer of short programmes by UK universities. Liaison should be similarly sought with industrial associations, particularly in mining, to match their most acute skills deficits to a UK offer.
- Engagement is also recommended with the Ministry of Energy and Mining, to identify the most acute skills deficits that may be addressed through courses offered by UK providers, and a scholarship programme for women in mining is worth consideration.
- Partnership with the Ministry of Education should be pursued to investigate the possibility of sponsoring higher education inclusion scholarships for students identified as having financial need from the COAR high performance schools.

## > Online offer

- The ratification of the UK/Peru Treaty on the Mutual Recognition of Degrees should open the market for a strong offer of online programmes, particularly to high level executives that may not be able to take the time to travel to the UK for extended study periods.
- Opportunities exist to offer shorter specialisation courses, and it is important to understand competitors current offer and price point to further evaluate how to approach this, with a promise of a return on investment to prospective students.

## > UK engagement

- Universities should explore an offer of Masterclasses, which may be offered online, as a means of showcasing specific institutional strengths, and aligned with skills deficits identified in this report.
- Engagement from the English language sector, or UK universities with in-house language schools, is recommended to offer executive- level English programmes, focusing on industry associations.
- UK universities should be encouraged to attend the PRONABEC national event, to meet prospective students. National communications campaigns with UK messaging around this period are recommended, and aligned with call announcements from PRONABEC and SERVIR.

## > Brand building

- A brand building campaign should be planned to further build on the positive awareness that exists around the UK.
- A Spanish version of the Study UK platform should be launched following a strategic media campaign, with an invitation for students to attend launch events in key Peruvian cities Lima and Arequipa. Students in other cities can be invited to join an online launch event.

## > Communications strategy

- The current status of a UK / Peru Treaty on the Mutual Recognition of Degrees presented to Parliament in May 2021 is not clear, but a national media campaign will be warranted in Peru once it is fully ratified.
- Identify key Peruvian websites that carry education related messaging, and consider brand sponsorship so that website users will see #StudyUK branding as soon as they enter the site.
- Media placement should include a call-to-action, for example: an invitation for students to attend themed webinars, with participation of small groups of UK universities, e.g. webinar on environmental engineering, with participation of one university in London, one in Scotland, and one in Northern Ireland.
- An email communication strategy should be developed, to ensure that students are not bombarded with uninteresting global messaging. It is unlikely that a student in Peru will be as interested in the success of a Japanese student as they would be in the personal tale of someone from Arequipa that won a scholarship to the UK that changed their lives.
- Messaging that will resonate with students in Peru include: student life in the UK; step-by-step guide to applying for university in the UK; strong alumni video testimonials from Peruvian graduates currently in employment; scholarship offers that are open to students from Peru (using the voice of former grantees from Peru).
- Compile a list of UK scholarships that are open to Peruvian students, including Chevening, and plan webinar events with former grantees (lead generation for future campaigns).

- Engagement with alumni from Peru should be a central part of the communications strategy, with local voices sharing stories of success. Occasional virtual coffee mornings will be a good way to engage with prospective students, providing them with a chance to speak to someone who has completed the course they are considering.

## > Agent relationships

- While there is no agent association in Peru, those agents highlighted in this report are active in higher education sales, and report high levels of self-funded students. Most agents already have direct partnerships with UK universities, and all but one would like more, so introductions should be made with British universities that are active in the region, or that want to increase admissions.
- If a trip to Peru is not on the agenda for UK universities, it is worthwhile considering an online B2B event so that Peruvian agents may get to know the representatives responsible for the region. Agents should be supplied with good quality marketing collateral to support their work.
- Review the current offer of UKVI IELTS testing in Peru, and the amount of students on waiting lists, to ensure that the offer of English testing is meeting demand, and to avoid a situation where students are unable to travel to the UK to pursue higher education programmes due to language testing backlogs.

## > EdTech Platforms

- Liaison is recommended with EdTech platforms that offer student recruitment solutions, to ensure that UK messaging is on-point. While ApplyBoard already works with a portfolio of agents in Peru, this is a market that Adventus are planning to move into.

## > School networks

- A network of Peruvian international and IB schools should be developed and training provided to school counsellors. This network should include the 25 'high performance' COAR schools that offer intensive English training and IB curriculum for free.
- Key messaging available in Spanish will be valuable for protective parents that focus on security and student services. Parents may also prefer the idea of sending their children to smaller cities than London.

## > Student recruitment

- It's not clear that there is enough demand in Peru to warrant organising a #StudyUK stand-alone recruitment event, and FPP and BMI are not active in Peru (the market is covered in wider LATAM events). However, organiser educationfair.nl will host a fair in Lima in March 2023, and it is recommended that British Council personnel attend to evaluate the quality before advising participation from UK universities.

