



BELTA SEAL RESEARCH 2026

MAPPING THE INTERNATIONAL EDUCATION MARKET IN BRAZIL

REALIZATION



SUPPORT:



SPONSOR:



SUPPORT:





MARKET RESEARCH **SELO BELTA 2026**

Research Team:

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Mobilidade
Acadêmica
— GRUPO DE PESQUISA —



The image is a blue-themed graphic. In the foreground, a globe of the Earth is shown with white clouds and blue oceans. Behind the globe, a city skyline with several skyscrapers is visible. In the upper right, a world map is composed of small blue dots, with white lines connecting various points across the continents. An airplane is flying from the left towards the center, leaving a white contrail. The background is a light blue gradient with some abstract white lines and a large blue shape that looks like a stylized 'V' or a wing.

| Students

A circular graphic with the text 'STUDENTS METHODOLOGY' in bold blue capital letters. The graphic consists of several concentric circles, some solid blue and some dotted, with horizontal lines extending from the center to the left and right.

RESEARCH TYPE: Quantitative

TARGET AUDIENCE: Students who have participated in exchange programs and students interested in studying abroad

RESPONDENTS: 2,271

DATA COLLECTION INSTRUMENT: Online questionnaire

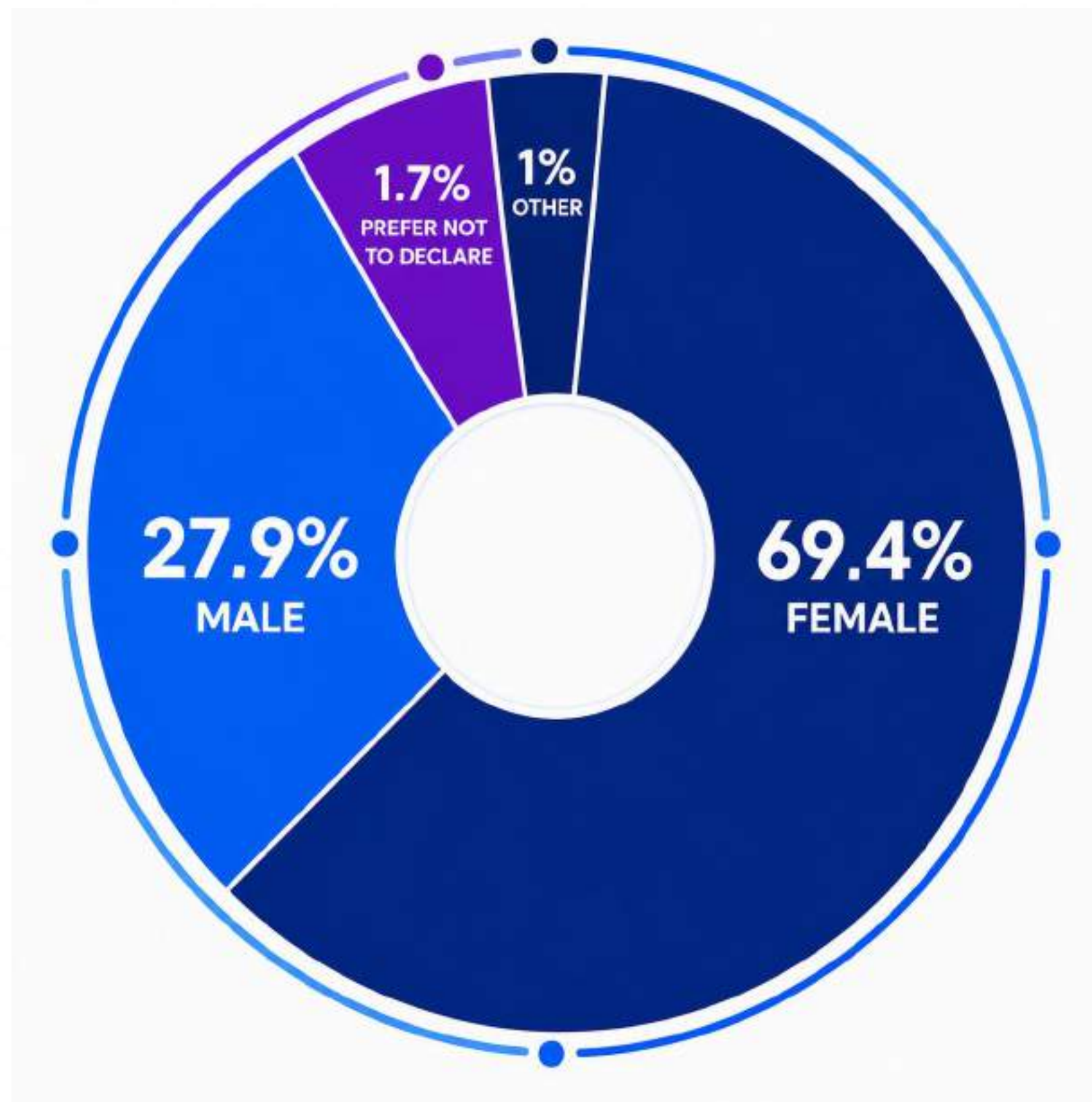
DATA COLLECTION STRATEGY: Invitations sent via email and social media

FIELDWORK PERIOD: February to April 2026

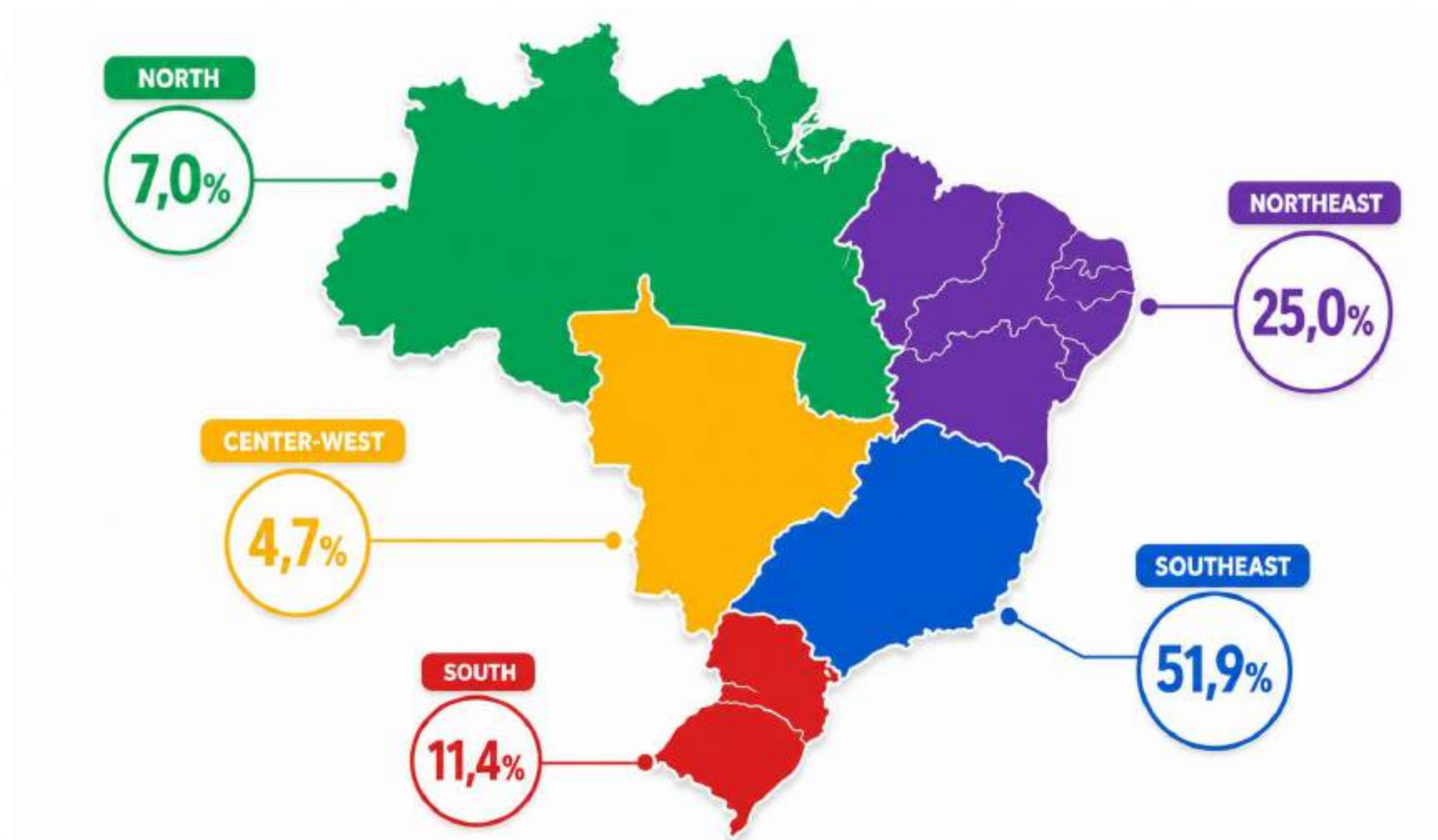
GEOGRAPHIC COVERAGE: Nationwide (Brazil)

MAILING LIST: Distributed by Belta, with support from Aspire.

Gender



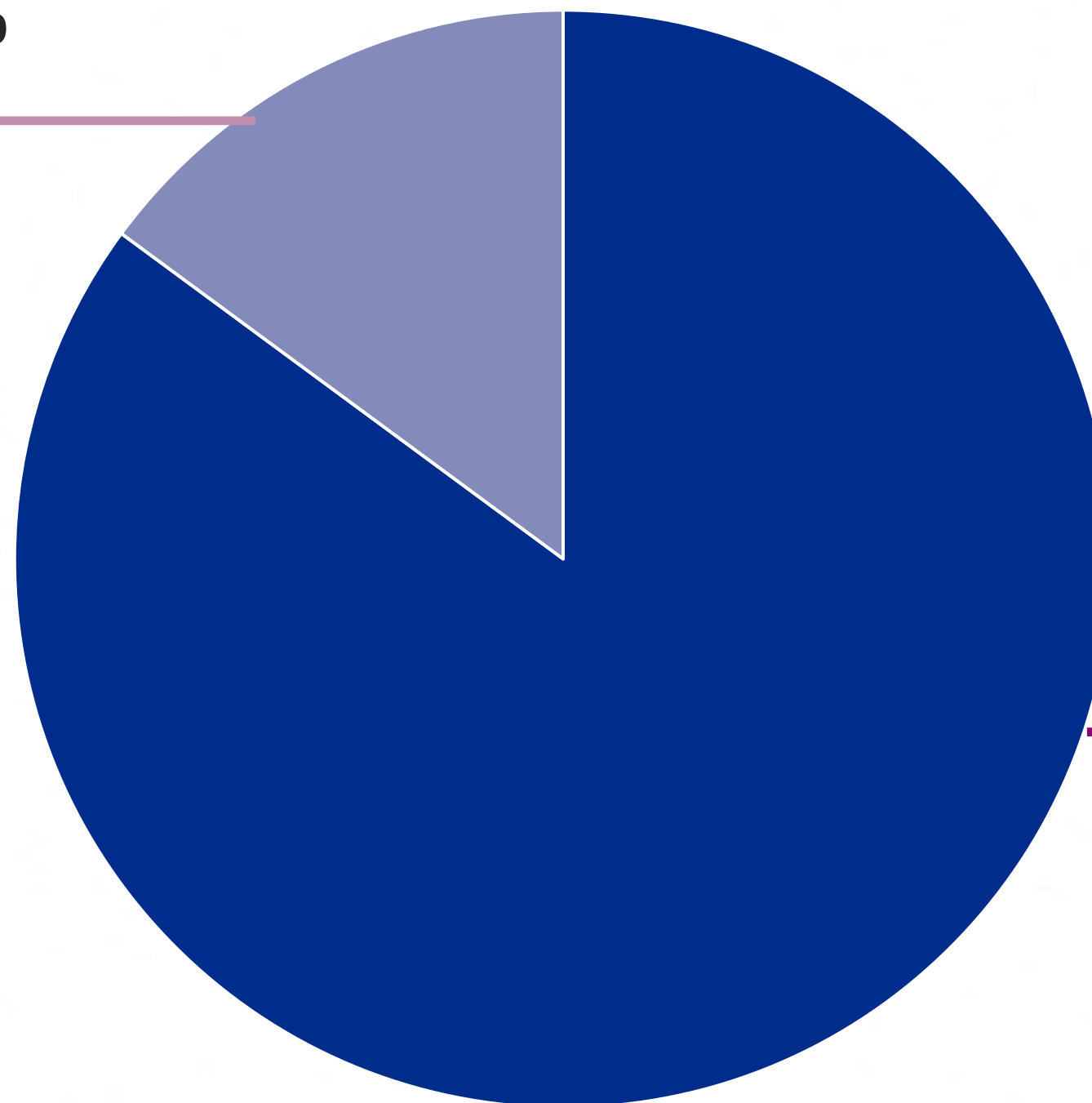
Regional distribution of respondents



First experience in international education

14,9%

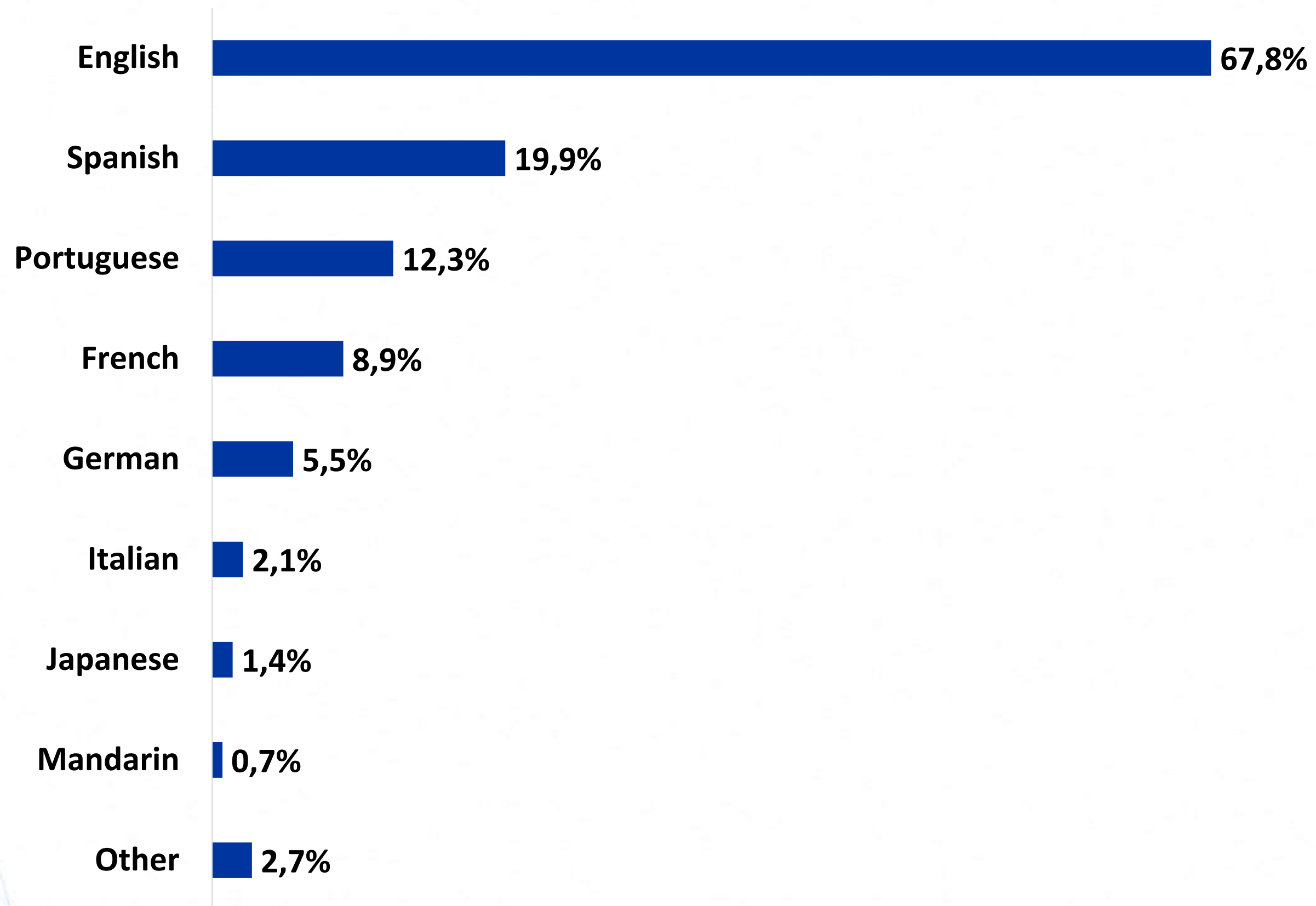
No



85,1%

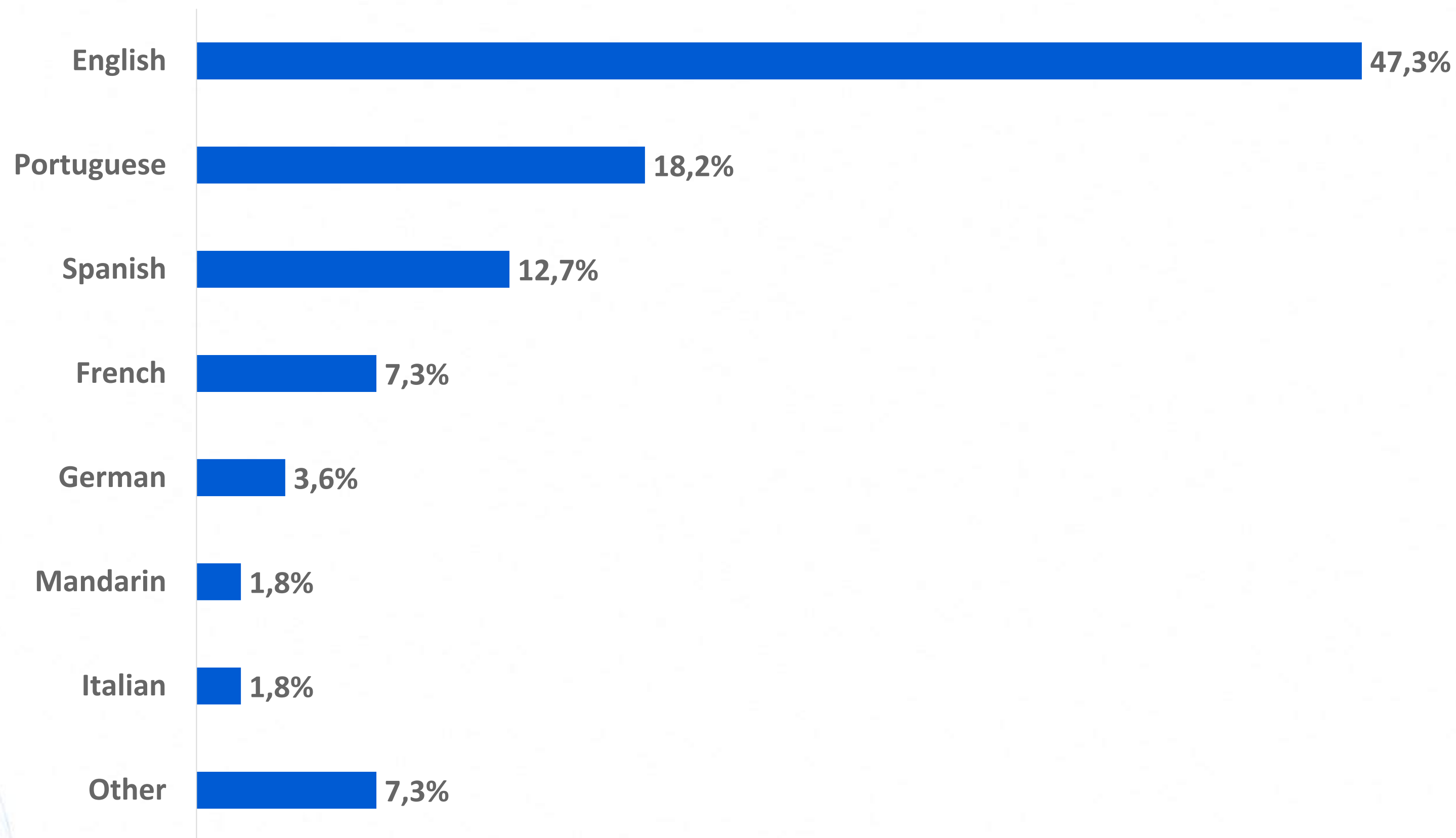
Yes

Language studied during the first international education experience



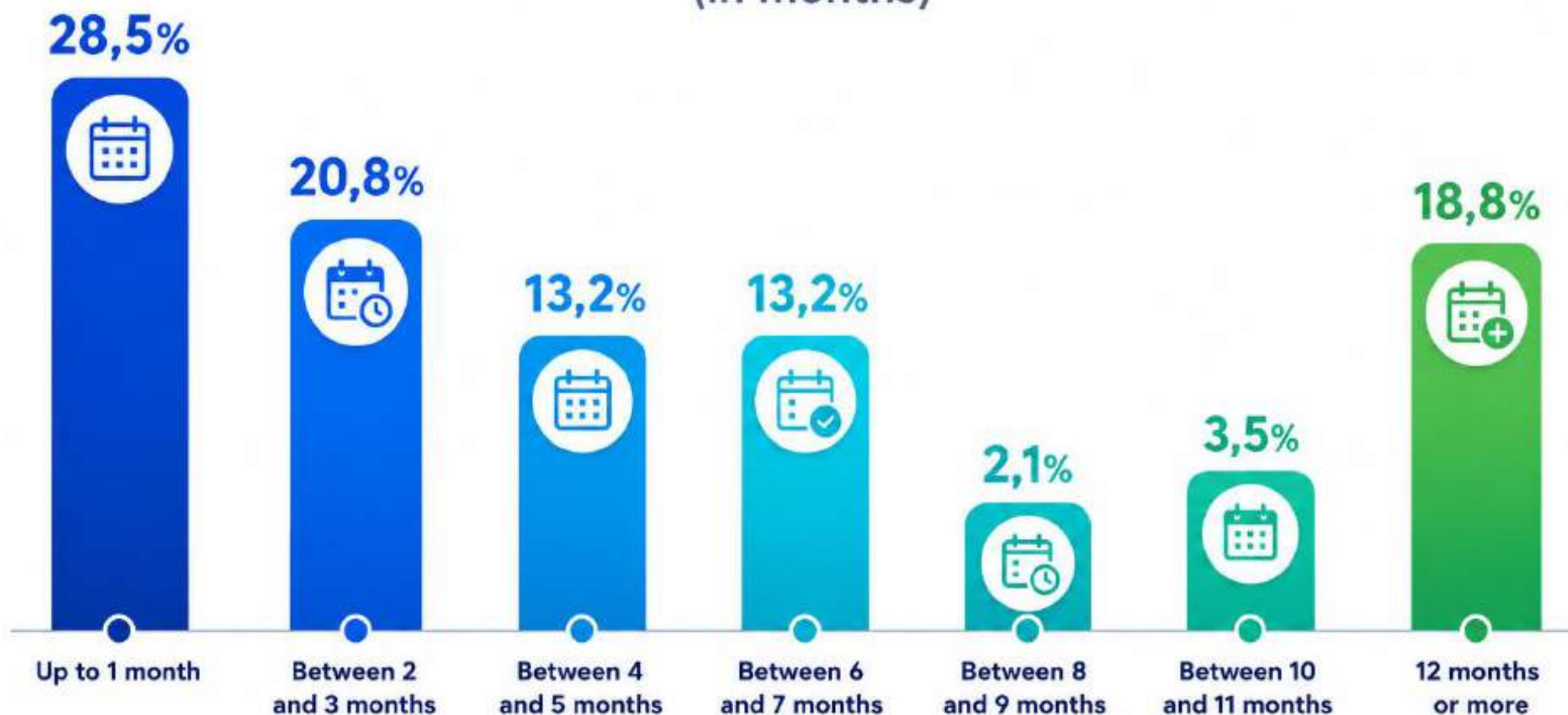
Language studied in the previous experience

Applicable when a program has already been implemented



DURATION OF EXCHANGE PROGRAM

(in months)



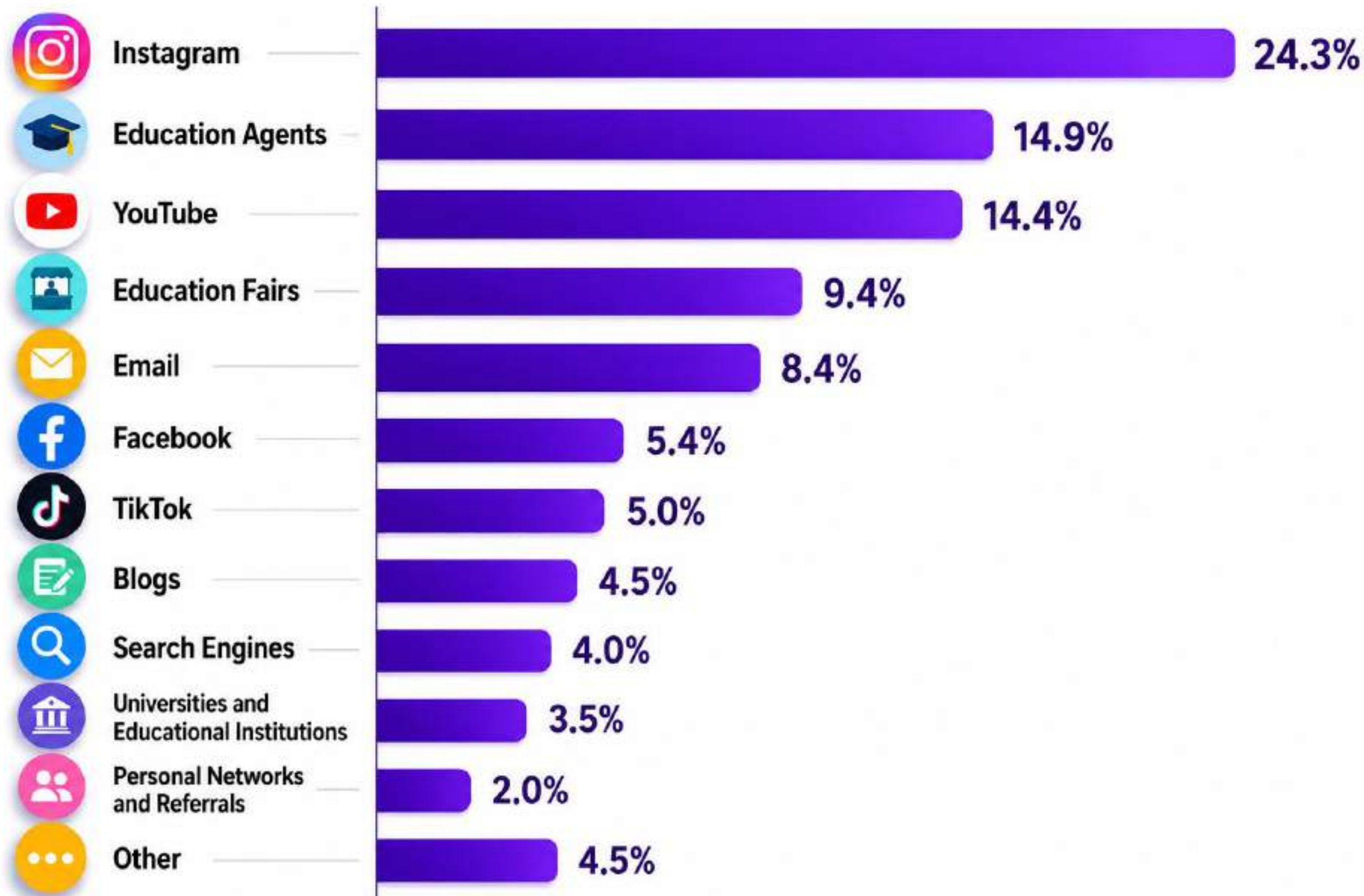
SUMMARY

Up to 3 months
49.3%
of exchanges

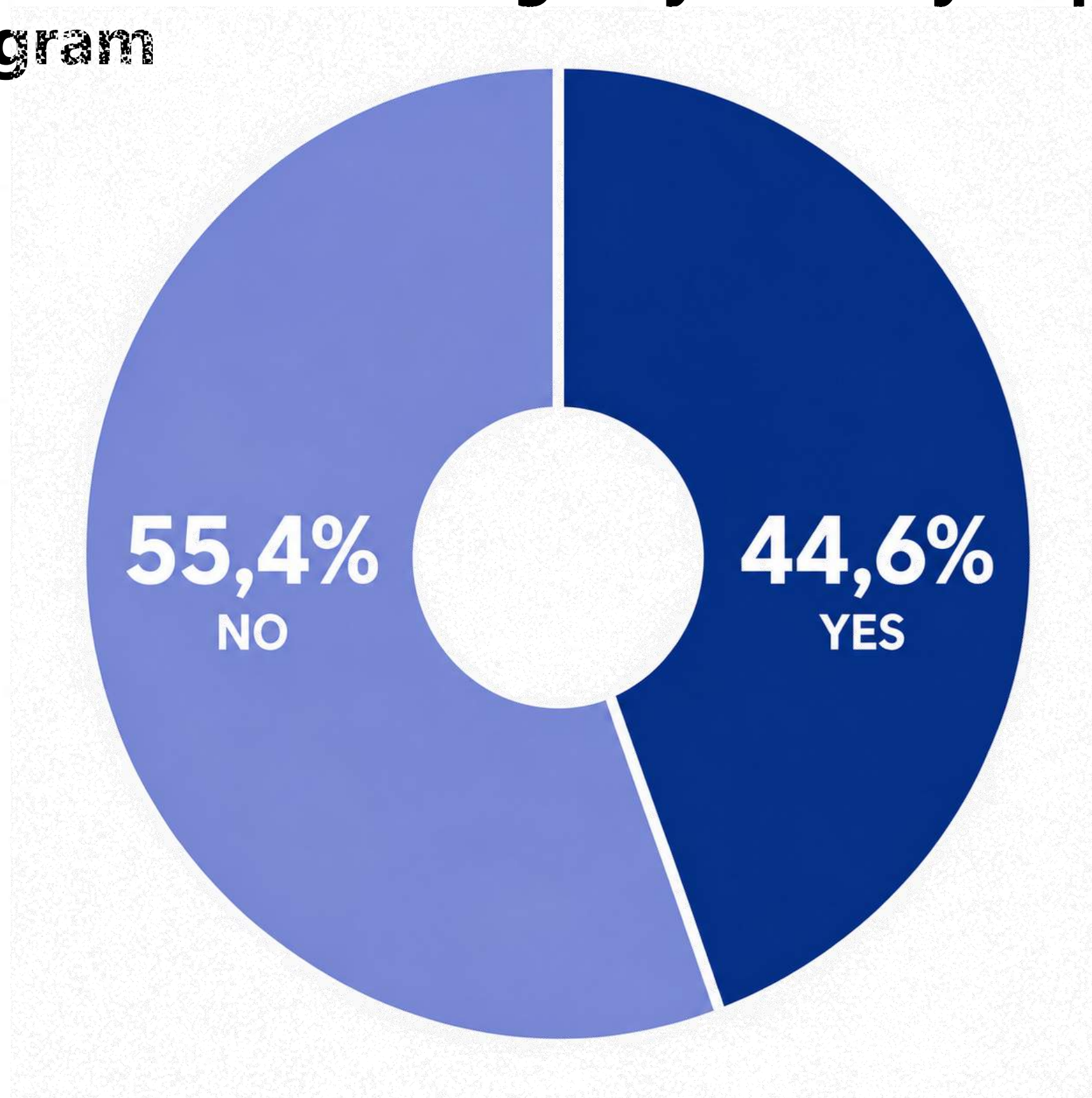
Between 4 and 7 months
26.4%
of exchanges

8 months or more
24.4%
of exchanges

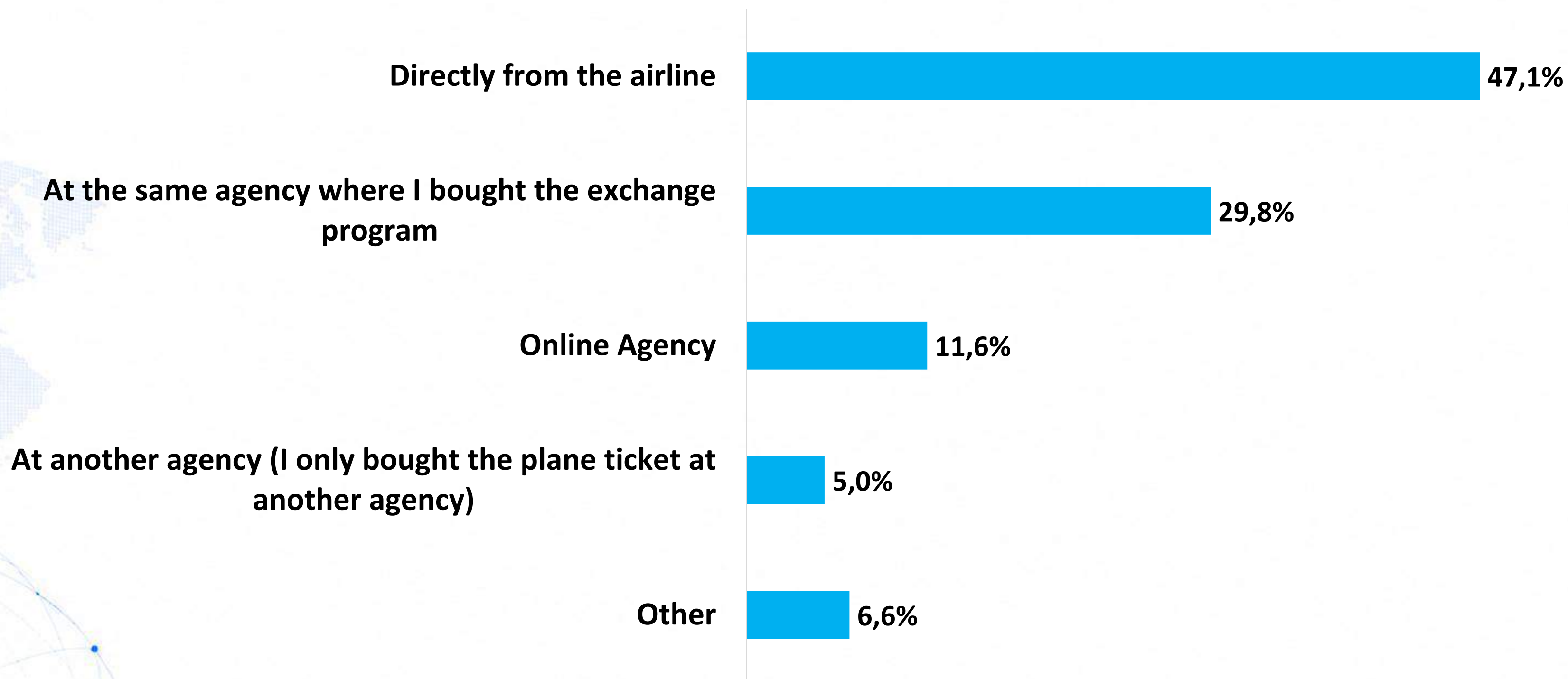
Sources through which you received information about the destination country



Offer of airline tickets at the agency where you purchased your exchange program

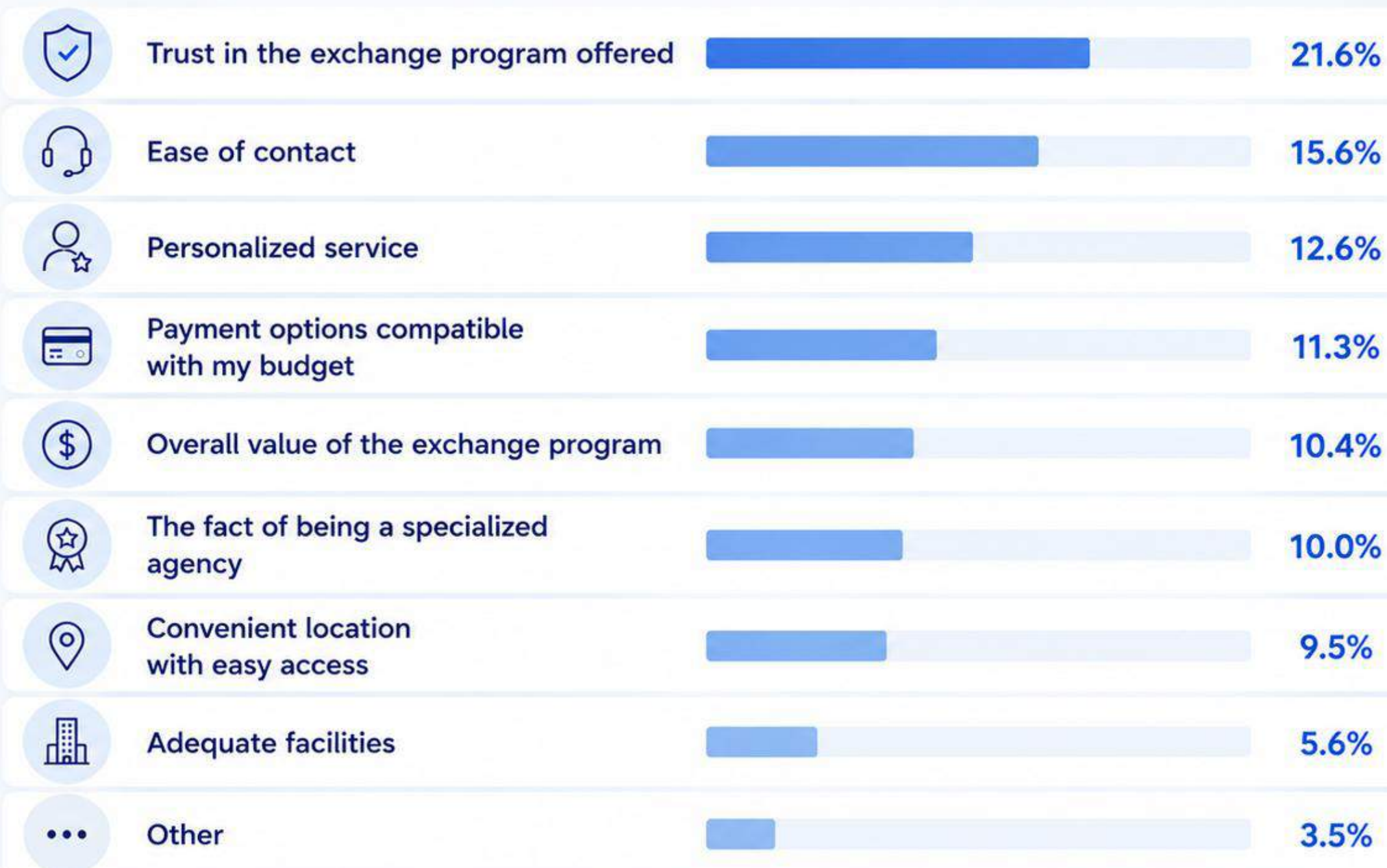


Method of purchasing airline tickets





REASONS FOR CHOOSING AN EXCHANGE AGENCY



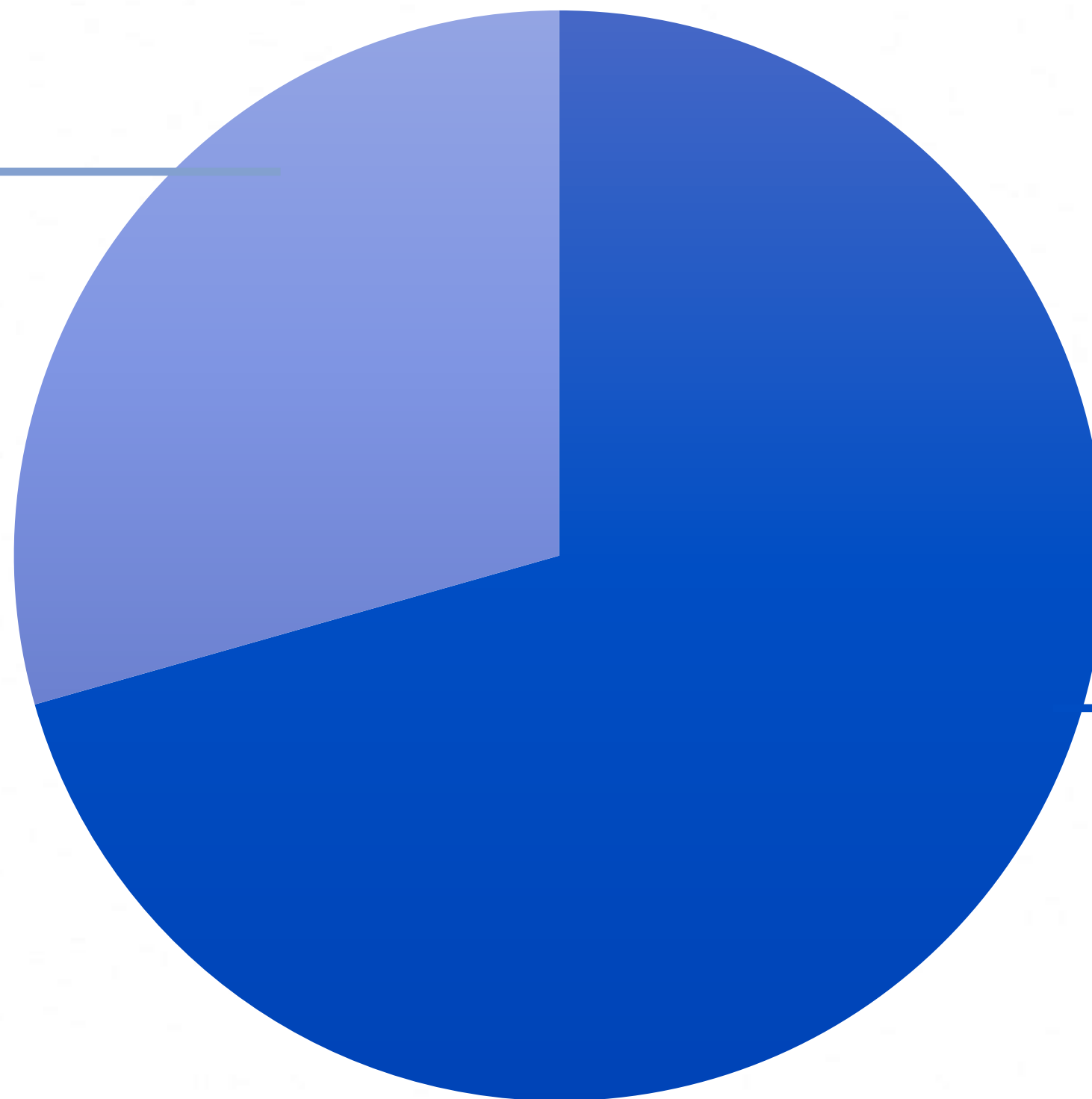


EXPECTATIONS FOR THE EXCHANGE PROGRAM

Interested in doing an exchange program soon

29,4%

No



70,6%

Yes



When do you plan to go on exchange?

| | | |
|--|----------------------------------|-------|
| | 1 st semestce of 2026 | 2.0% |
| | 2 nd semester of 2026 | 8.4% |
| | 1 st semestce of 2027 | 19.8% |
| | 2 nd semester of 2027 | 16.9% |
| | In 2028 or later | 31.0% |
| | I don't know | 22.1% |





TYPE OF DESIRED EXCHANGE



| Agents

The background is a blue-toned digital composition. At the bottom, a realistic globe of Earth is shown with white clouds. Above the globe, a city skyline with various skyscrapers is visible. In the upper right, a world map is rendered in a dotted blue style, with white lines and glowing nodes connecting different regions, symbolizing a global network. A white commercial airplane is flying from the left towards the center, leaving a white contrail. The overall aesthetic is clean, modern, and professional.

A graphic consisting of several concentric circles and arcs in shades of blue, with the text "Agents Methodology" centered in a bold, dark blue font.

Agents Methodology

- **NATURE OF THE RESEARCH:** Quantitative.
- **TARGET AUDIENCE:** Network managers of exchange agencies, exchange agency managers, franchisees, supervisors, managers, owners or representatives of exchange brands.
- **RESPONDENTS:** 74 responding companies, representing 590 Belta and non-Belta points of sale.
- **DATA COLLECTION INSTRUMENT:** Online questionnaire.
- **DATA COLLECTION STRATEGY:** Invitations sent by email.
- **APPLICATION PERIOD:** February to April 2026.
- **REACH:** National.
- **LISTING:** Sent by Belta, with support from ICEF and StudyTravel.

A graphic for 'Agents Methodology' featuring a central white circle with the text 'Agents Methodology' in bold blue font. This circle is surrounded by several concentric blue rings of varying thickness and opacity, some solid and some dotted. Two horizontal blue lines with circular endpoints extend from the left and right sides of the central circle. The background includes a blue curved shape in the top-left corner and a network of thin blue lines with dots in the bottom-left corner.

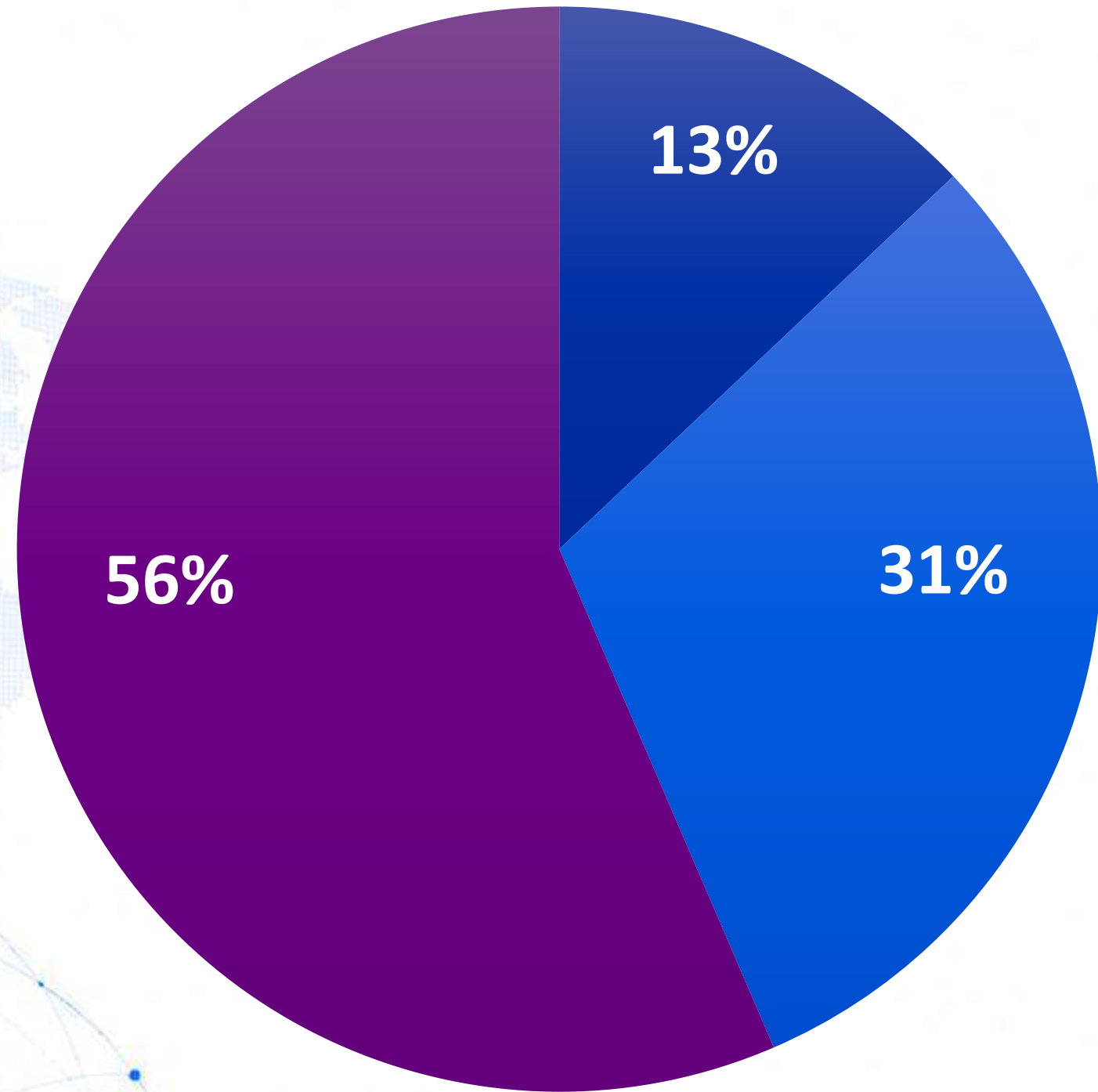
Agents Methodology

In the main questions of the data collection instrument, a ranking system was used, whereby a score is assigned to each response according to the position given to the items in the ranking made by the respondent (e.g., 1st place: 20 points; 2nd place: 19 points; ...; 20th place: 1 point).

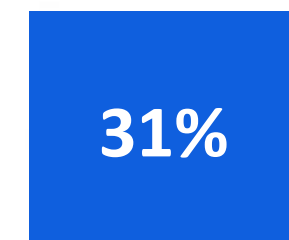
This is a resource that ensures greater accuracy of information and refinement of analysis.

Adequate methodology for longitudinal comparative studies (research over time).

Respondent Profile (Agents)



Manager of an exchange agency

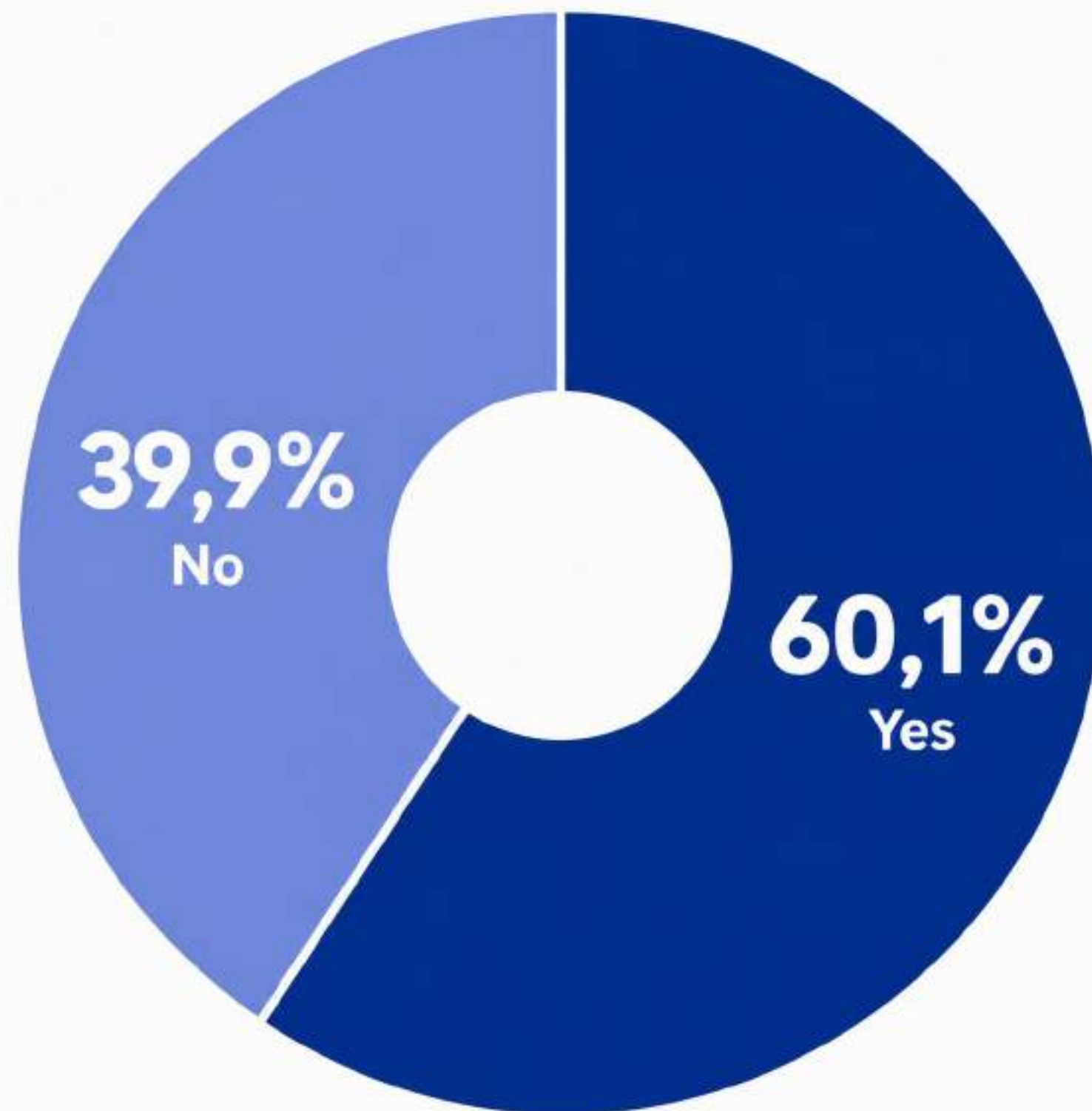


Franchisee, supervisor, manager, owner, or representative of an exchange program brand

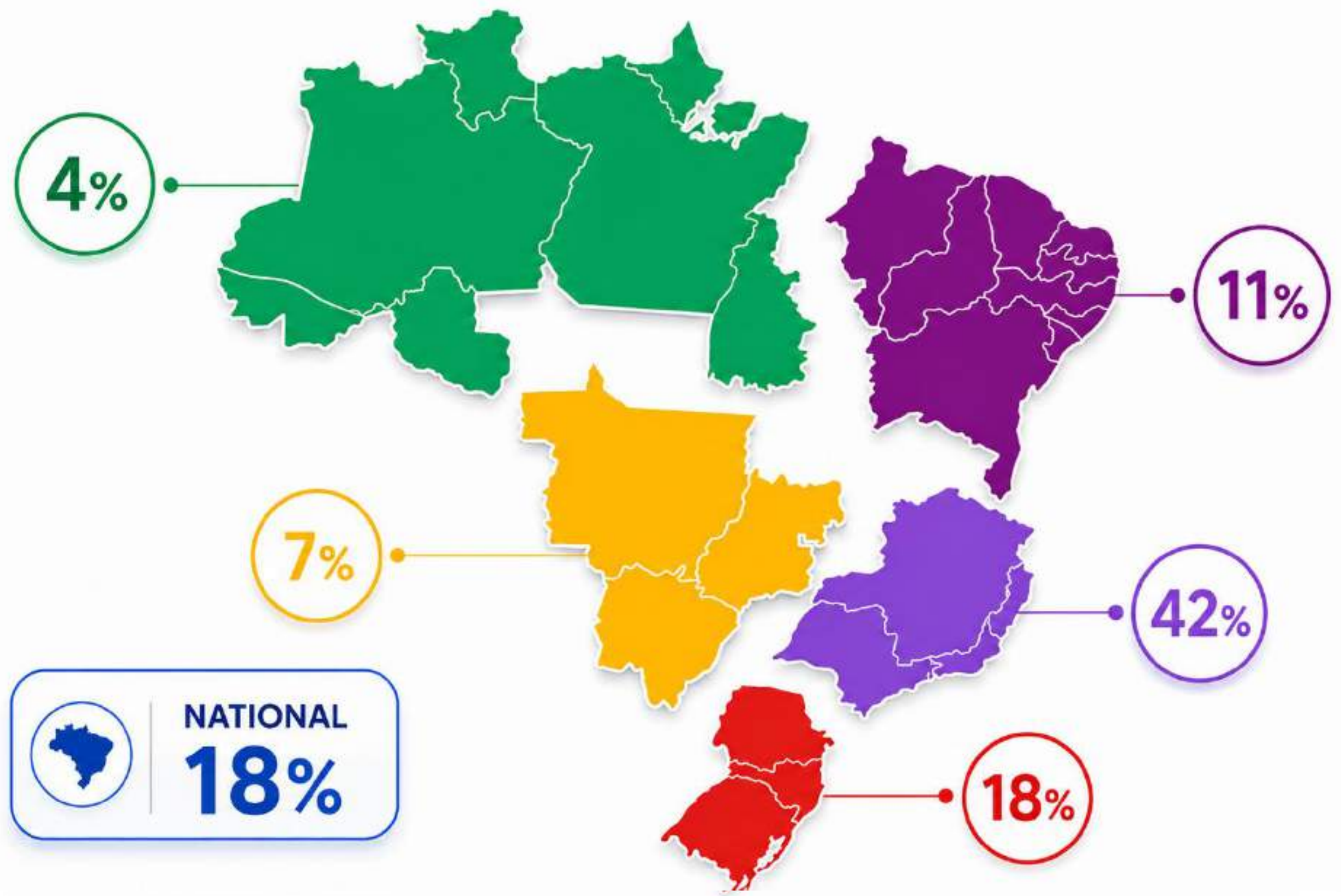


Manager of a network of exchange agencies

Member of Belta



Regions of operation



TOP PROGRAMS SOLD

Ranking of the **11 types of experiences** most mentioned

| | | |
|------|--|--|
| 1st | | Language Course |
| 2nd | | Holiday Course (summer/winter) for Teens |
| 3rd | | High School (secondary education) |
| 4th | | Language Course with Work Experience |
| 5th | | Professional Course, Certificate or Diploma |
| 6th | | Undergraduate Degree |
| 7th | | Postgraduate Degree (MBA, Specialization, Master's or PhD) |
| 8th | | Work and Travel (United States) |
| 9th | | Volunteering |
| 10th | | Au Pair |
| 11th | | Internship (work experience) |



INTERNATIONALIZATION

Programs that connect people, cultures and markets.



GLOBAL MOBILITY

Experiences in different countries that transform journeys.



ACADEMIC & PROFESSIONAL DEVELOPMENT

Academic, professional and personal growth without borders.



NEW POSSIBILITIES

More than a course, a path to your global future.



WHAT THE DATA SHOWS:

Language Courses lead the ranking, followed by Holiday Courses for Teens and High School programs, which also show strong relevance. Undergraduate and Postgraduate programs appear close in sequence, with practical experiences such as Work and Travel, volunteering, au pair and internships completing the top 11, highly sought after by those pursuing complete international experiences.



Learn, work and live new cultures.

The world is your destination.

TOP SERVICES SOLD

Ranking of the **4 services** most mentioned



1st



Travel health insurance

2nd



Air ticket issuance

3rd



Visa advisory services

4th



Accommodation booking



WHAT THE DATA SHOWS:

Travel health insurance leads the ranking, followed by air ticket issuance. Visa advisory services and accommodation booking complete the top services sought by those planning international trips and experiences.



Services that connect people to opportunities, destinations and new stories.

The world within your reach.

WHY ARE THESE SERVICES ESSENTIAL?



SAFETY & PEACE OF MIND

Financial protection for travelers to enjoy a safer and worry-free experience.



GLOBAL CONNECTIVITY

Access to the best routes and fares to any destination in the world.



ACCESS TO NEW DESTINATIONS

Specialized support to make dreams and international projects possible.



COMFORT & WELL-BEING

Carefully selected accommodations for a complete experience.



Main Reasons for Investing in Study Abroad

- 1st**  Experience an international journey that combines **Study, Work, and Travel**
- 2nd**  Fulfill the dream of exploring different **countries and cultures**
- 3rd**  Interest in learning a **foreign language**
- 4th**  Interest in pursuing an international **education and/or career**
- 5th**  Interest in **living abroad temporarily**
- 6th**  Importance of enhancing one's **résumé (CV)**
- 7th**  Interest in **moving abroad / immigrating**



New Experiences



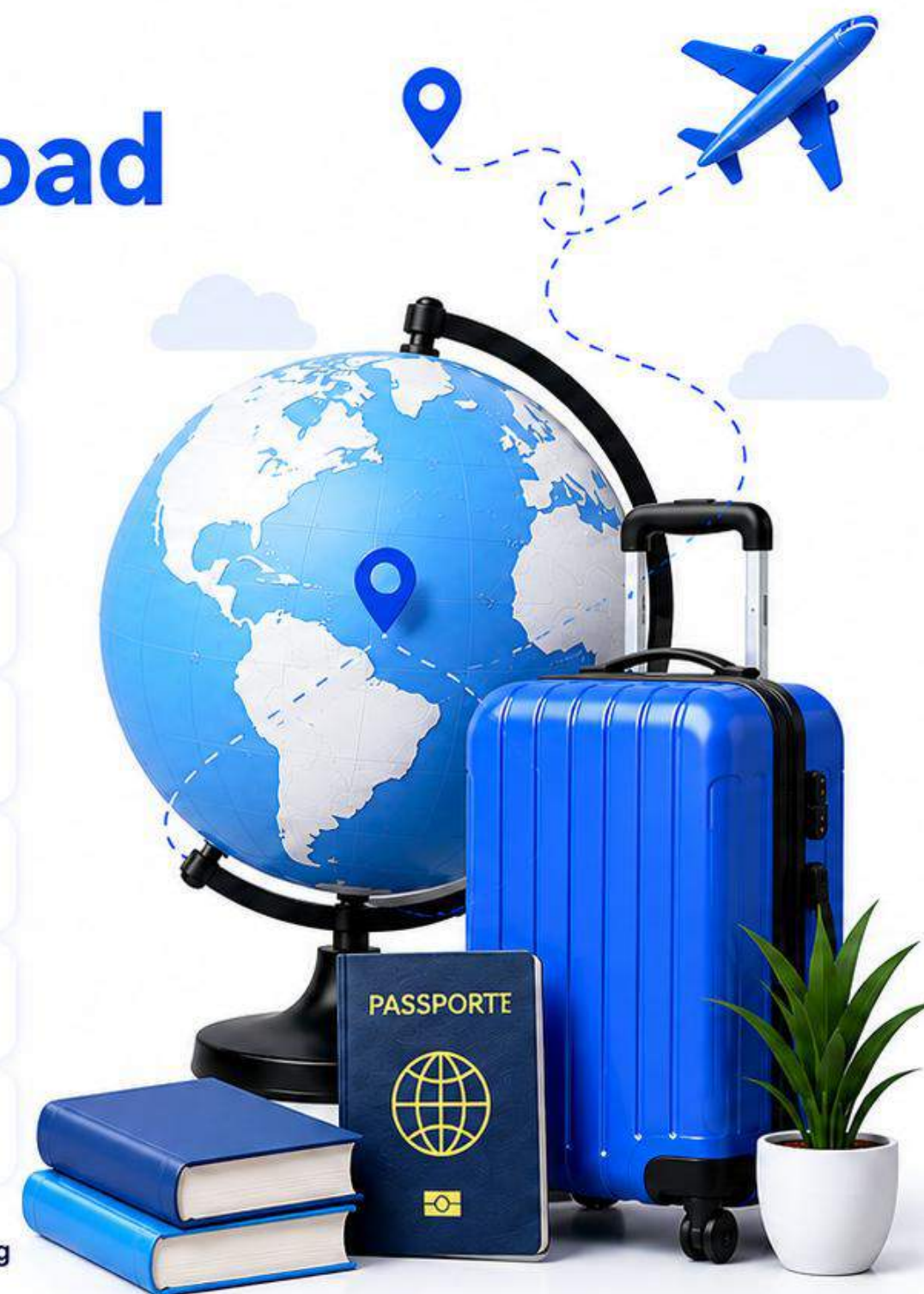
Personal and Professional Development



Broadening Horizons



Life-Changing Memories



Objectives for studying abroad

| | | | | |
|----|----|-----------|--|--------------|
| 2º | 2º | 1º | Live an international experience that combines work, study and tourism | 2.666 |
| 6º | 1º | 2º | Accomplishing the dream to meet new countries and different cultures | 2.539 |
| 4º | 3º | 3º | Interest in learning/improving languages | 2.530 |
| 1º | 4º | 4º | Interest in investing in an international education and/or career | 2.185 |
| 5º | 5º | 5º | Interest in living abroad for a set period of time | 1.977 |
| 3º | 6º | 6º | Importance to make curriculum stand out | 1.650 |
| 7º | 7º | 7º | Living in another country/immigrating | 1.269 |



TOP DESTINATIONS

Ranking of the **15 most sought-after** destinations



| | | | | | | | | |
|-----------------|--|----------------|------------------|--|--------------|------------------|--|----------------------|
| 1 st | | Canada | 6 th | | Australia | 11 th | | Germany |
| 2 nd | | United States | 7 th | | Spain | 12 th | | France |
| 3 rd | | United Kingdom | 8 th | | New Zealand | 13 th | | United Arab Emirates |
| 4 th | | Ireland | 9 th | | Italy | 14 th | | South Korea |
| 5 th | | Malta | 10 th | | South Africa | 15 th | | Switzerland |



WHAT THE DATA SHOWS:

North America and Europe lead the preferences, with a strong presence of traditional destinations for study, work and exchange. Australia and New Zealand also stand out in the search for new experiences.



From language to exchange, **each destination can transform your journey.**



Main destinations

| 2023 | 2024 | 2025 | | Score |
|------|------|------------|----------------------|--------------|
| 1º | 1º | 1º | Canada | 7.129 |
| 3º | 2º | 2º | United States | 5.958 |
| 2º | 3º | 3º | United Kingdom | 5.886 |
| 4º | 4º | 4º | Ireland | 5.342 |
| 6º | 6º | 5º | Malta | 4.544 |
| 5º | 5º | 6º | Australia | 4.271 |
| 8º | 9º | 7º | Spain | 2.639 |
| 9º | 8º | 8º | New Zealand | 2.394 |
| 11º | 11º | 9º | Italy | 1.886 |
| 7º | 7º | 10º | South Africa | 1.723 |
| 12º | 10º | 11º | Germany | 1.641 |
| 10º | 12º | 12º | France | 1.423 |
| - | - | 13º | United Arab Emirates | 834 |

Main destinations

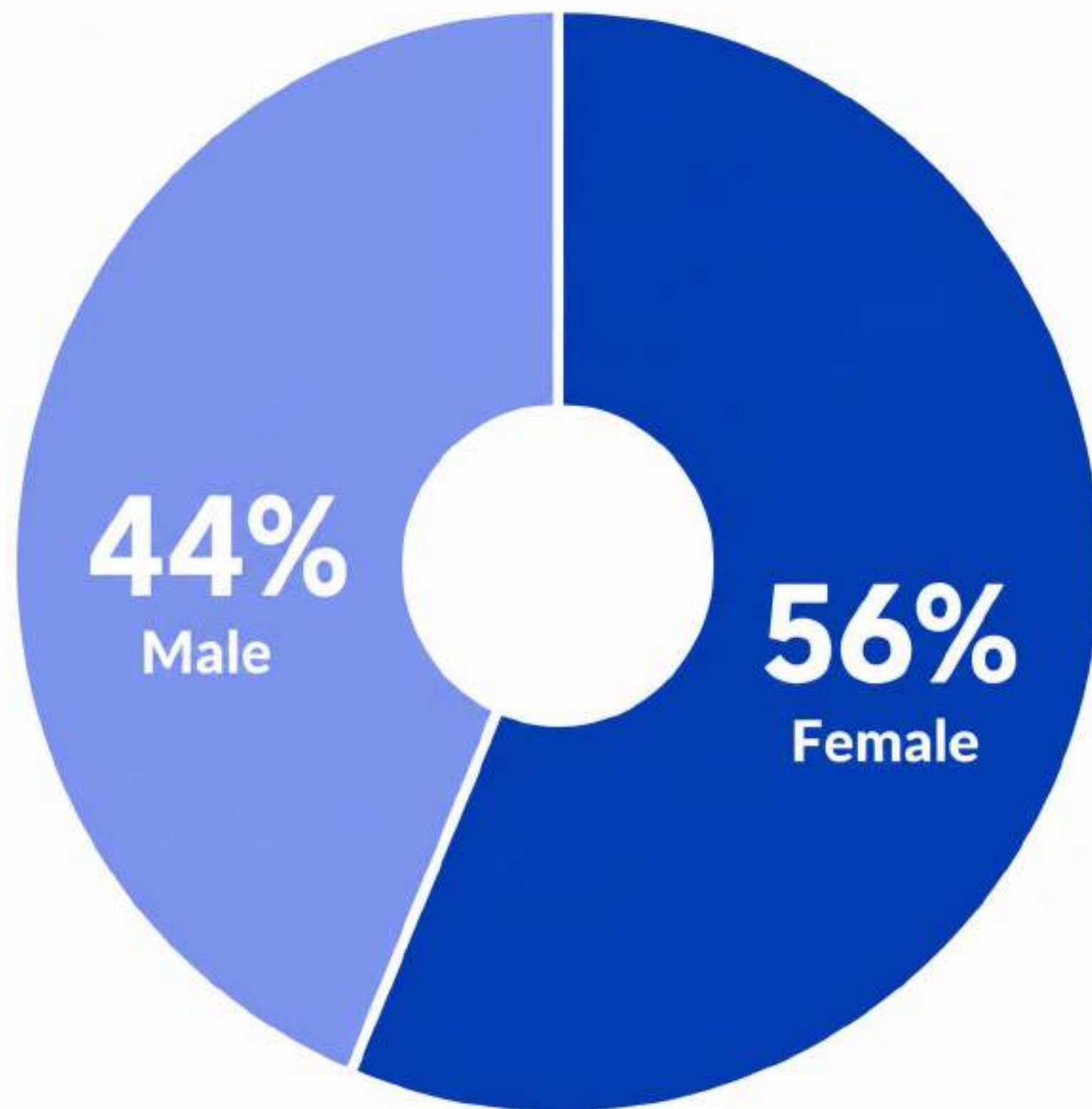
| 2025 | | Score |
|-------------|-------------|--------------|
| 14º | South Korea | 507 |
| 15º | Switzerland | 399 |
| 16º | Portugal | 272 |
| 17º | Japan | 253 |
| 18º | Argentina | 244 |
| 19º | Chile | 199 |
| 20º | China | 81 |
| 21º | Colombia | 72 |
| 22º | Uruguay | 54 |

AGE RANGE

OF CLIENTS WHO TRAVELED

| | |
|-----------------|-----------------------|
| 1 st | 18 to 24 years old |
| 2 nd | 15 to 17 years old |
| 3 rd | 25 to 29 years old |
| 4 th | 30 to 39 years old |
| 5 th | 40 to 49 years old |
| 6 th | Under 15 years old |
| 7 th | 50 years old or older |

Gender of customers who traveled in 2025



COMMERCIALIZED LANGUAGE COURSES

| 2025 | Course | Score |
|------|--|-------|
| 1st |  English | 3,745 |
| 2nd |  Spanish | 2,194 |
| 3rd |  French | 1,877 |
| 4th |  Italian | 1,414 |
| 5th |  German | 1,215 |
| 6th |  Japanese | 444 |
| 7th |  Mandarin | 235 |
| 8th |  Korean | 94 |

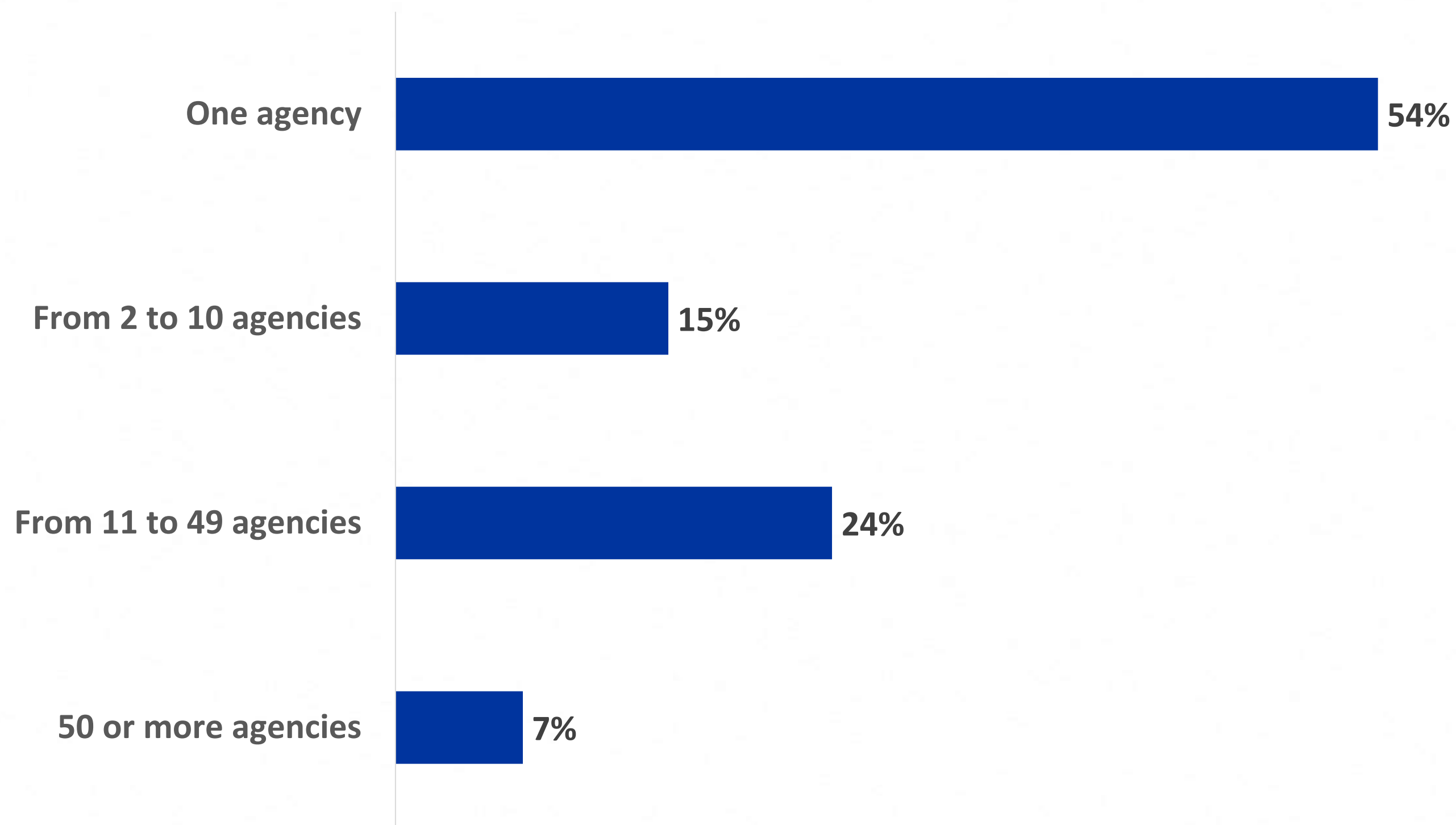


English was ranked 1st by **93%** of the agencies.



Korean was mentioned spontaneously in some position by **6%**.

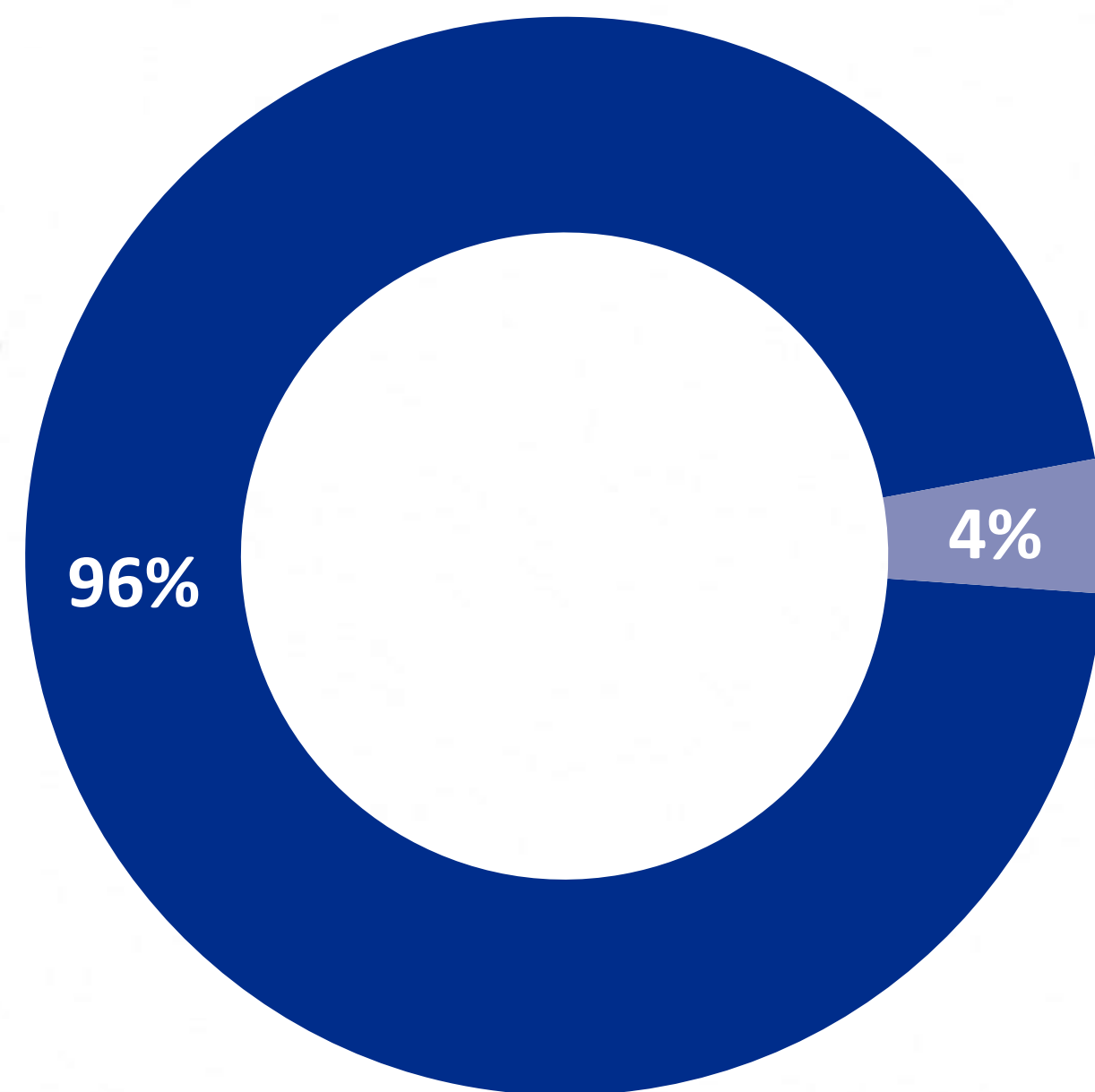
Number of agencies that are part of the networks



Respondent base: 74 responding companies.

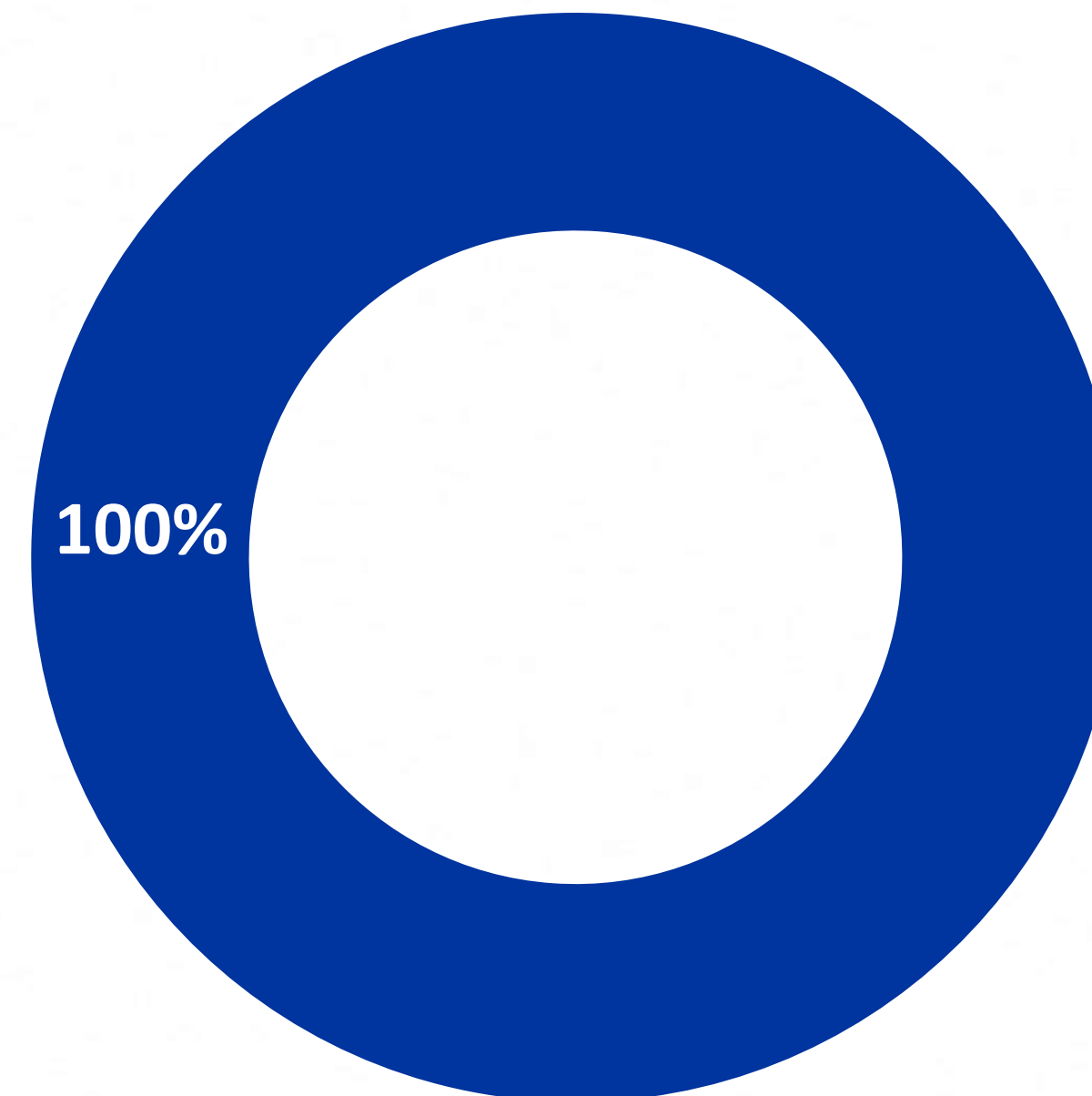
Agencies that provide online services

2024



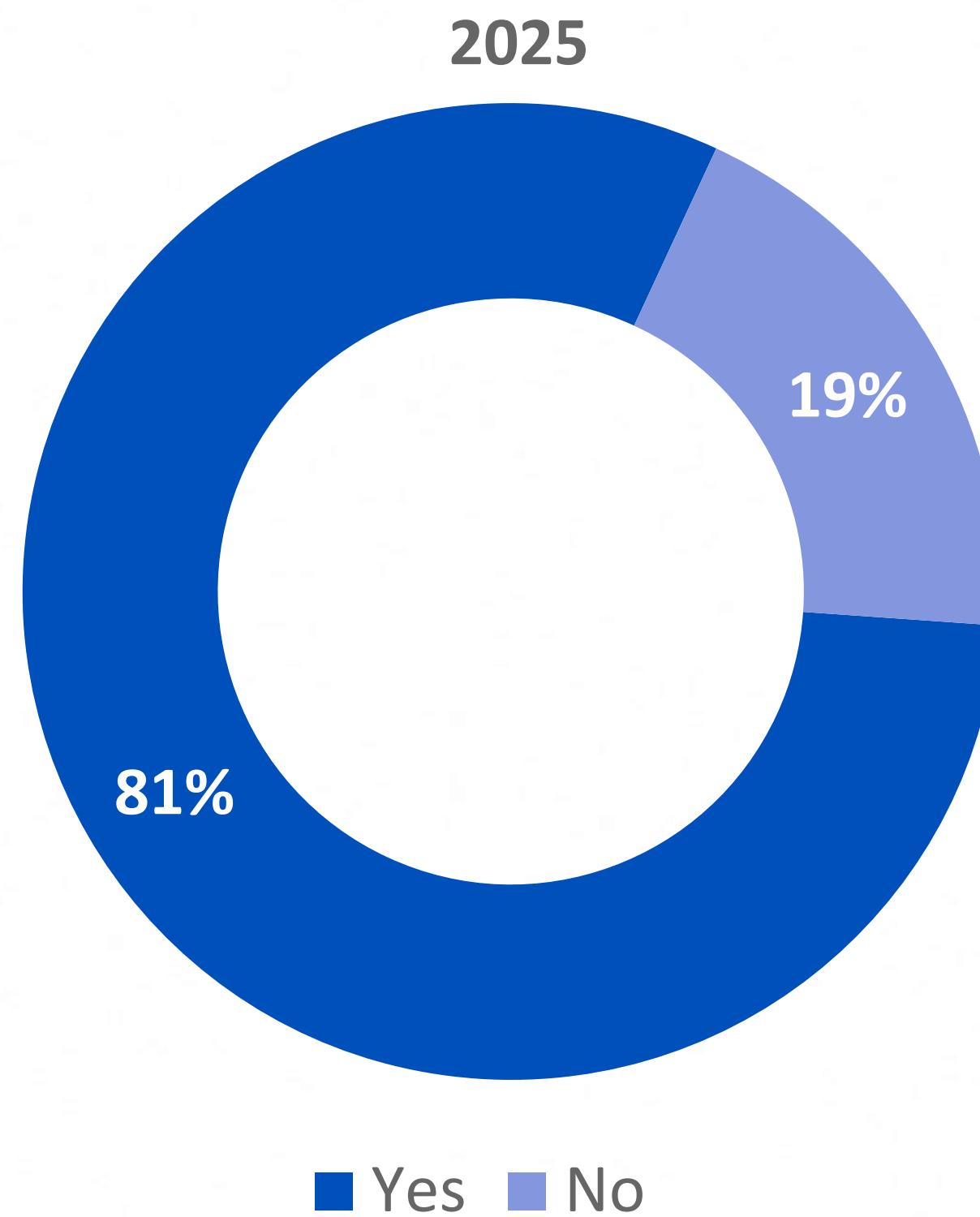
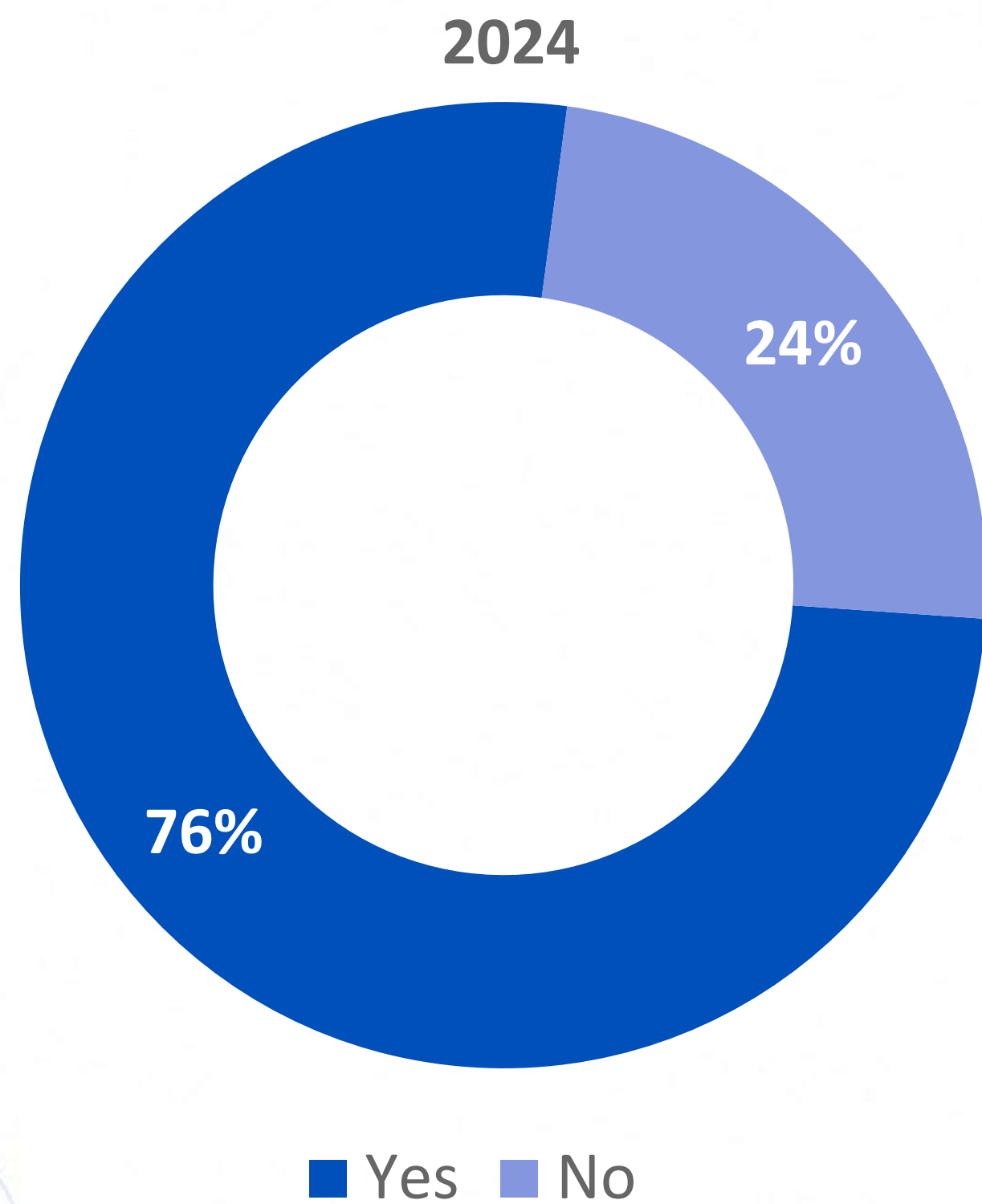
■ Yes ■ Não

2025



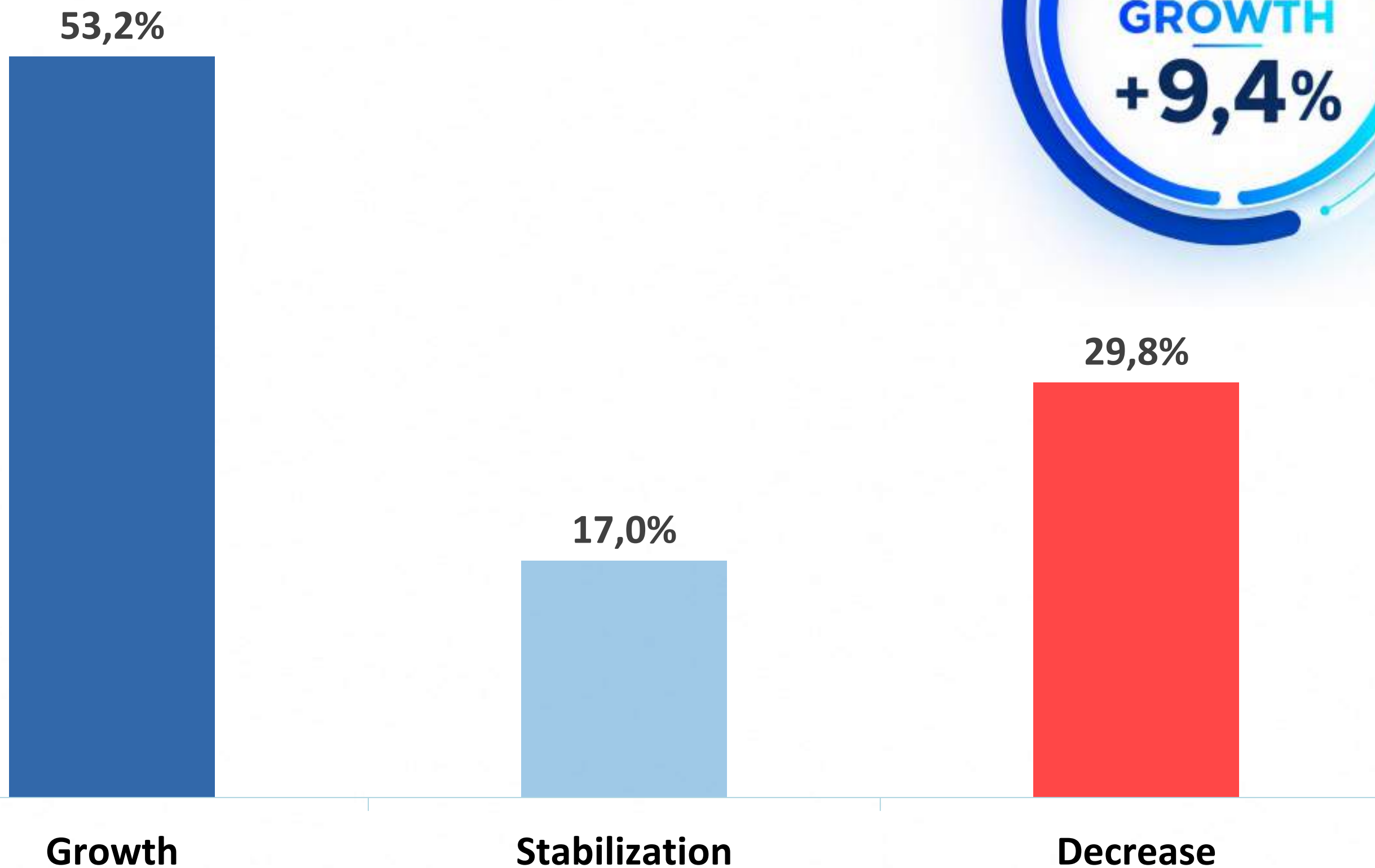
■ Yes

Agencies that conduct online sales

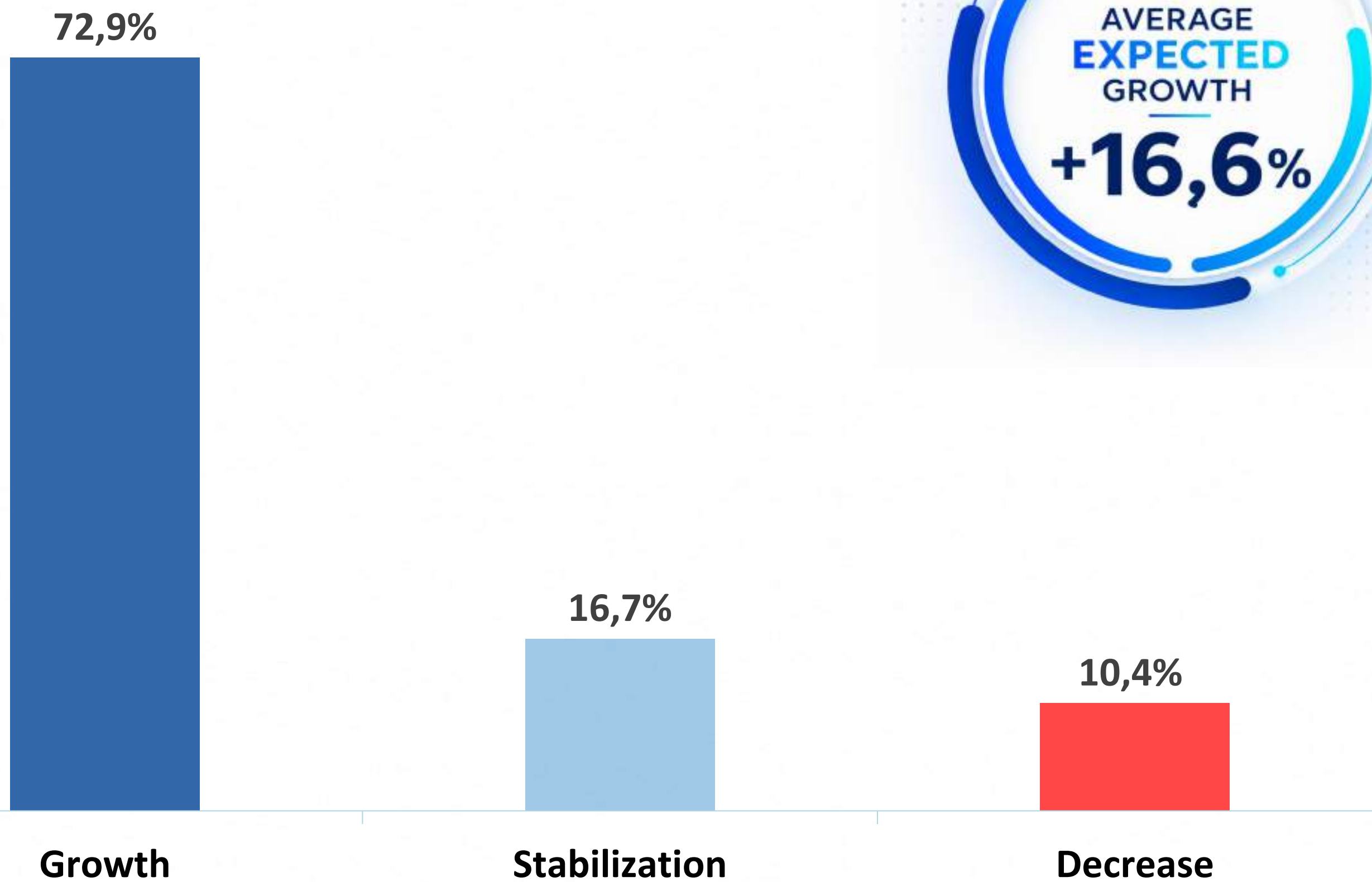


Sending students abroad in 2025

(Compared to 2024)



Expectations for 2026





Main factors that favored sales of products/services

- 1st**  Final value of the exchange
- 2nd**  Renewal of programs or services made available by our agency or network
- 3rd**  Strengthening of advertising campaigns
- 4th**  Customer permission to reconcile study and work activities
- 5th**  Renewal of programs or services offered by international partners
- 6th**  Ease for the customer to obtain a visa
- 7th**  Customer ability to finance the course/airline ticket





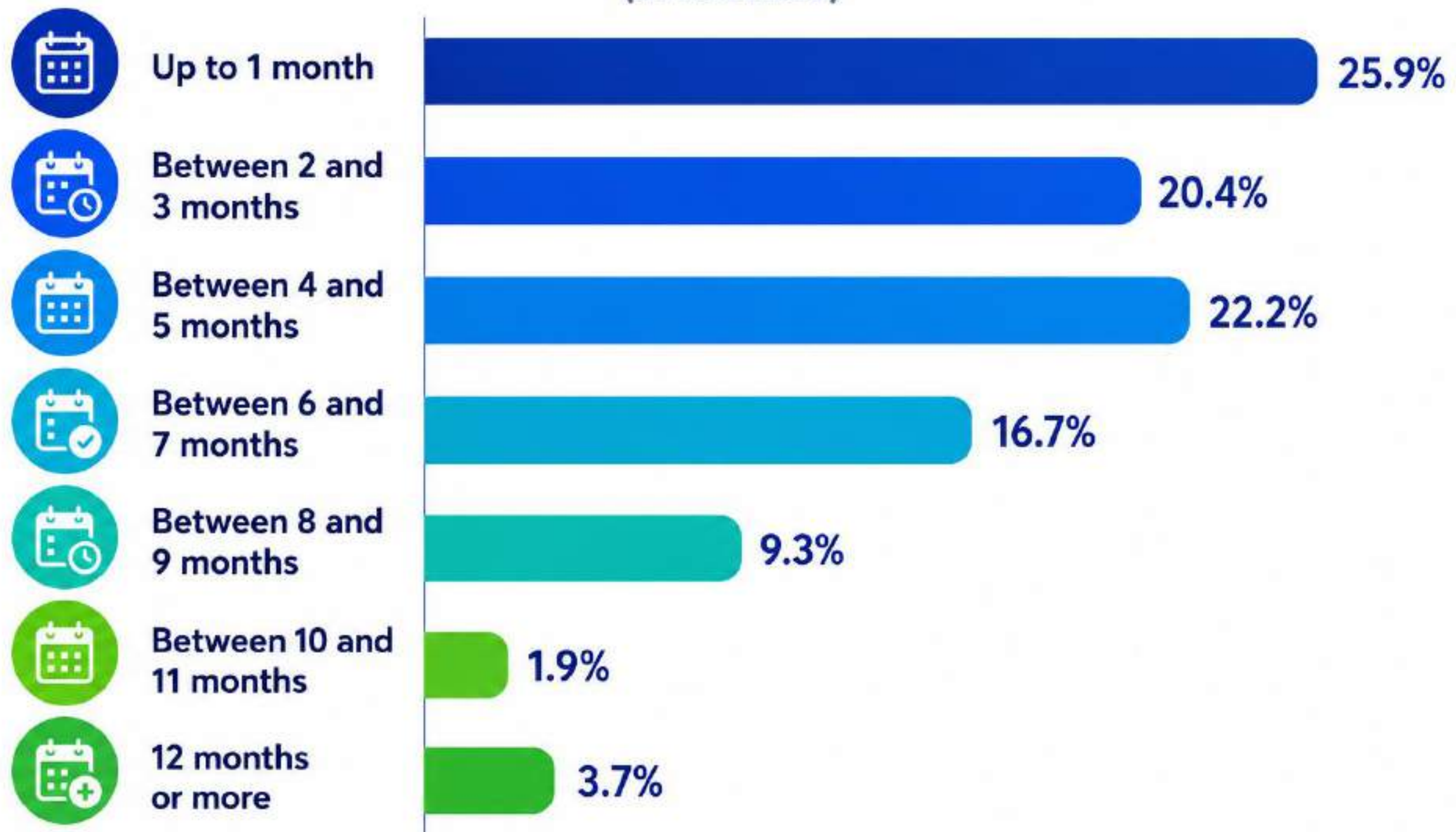
Main factors that **hindered** the sale of products/services

- 1st  | Devaluation of the local currency against other currencies
- 2nd  | Political and/or economic instability in the destination country
- 3rd  | Reduction in customers' purchasing power
- 4th  | Difficulty in obtaining a visa
- 5th  | Increase in exchange rates, regardless of the exchange rate
- 6th  | Increase in cost of living in the destination country
- 7th  | Concerns about the safety of children in the destination country
- 8th  | Increase in airfare prices
- 9th  | Difficulty balancing study and work in the destination country
- 10th  | Difficulty finding accommodation

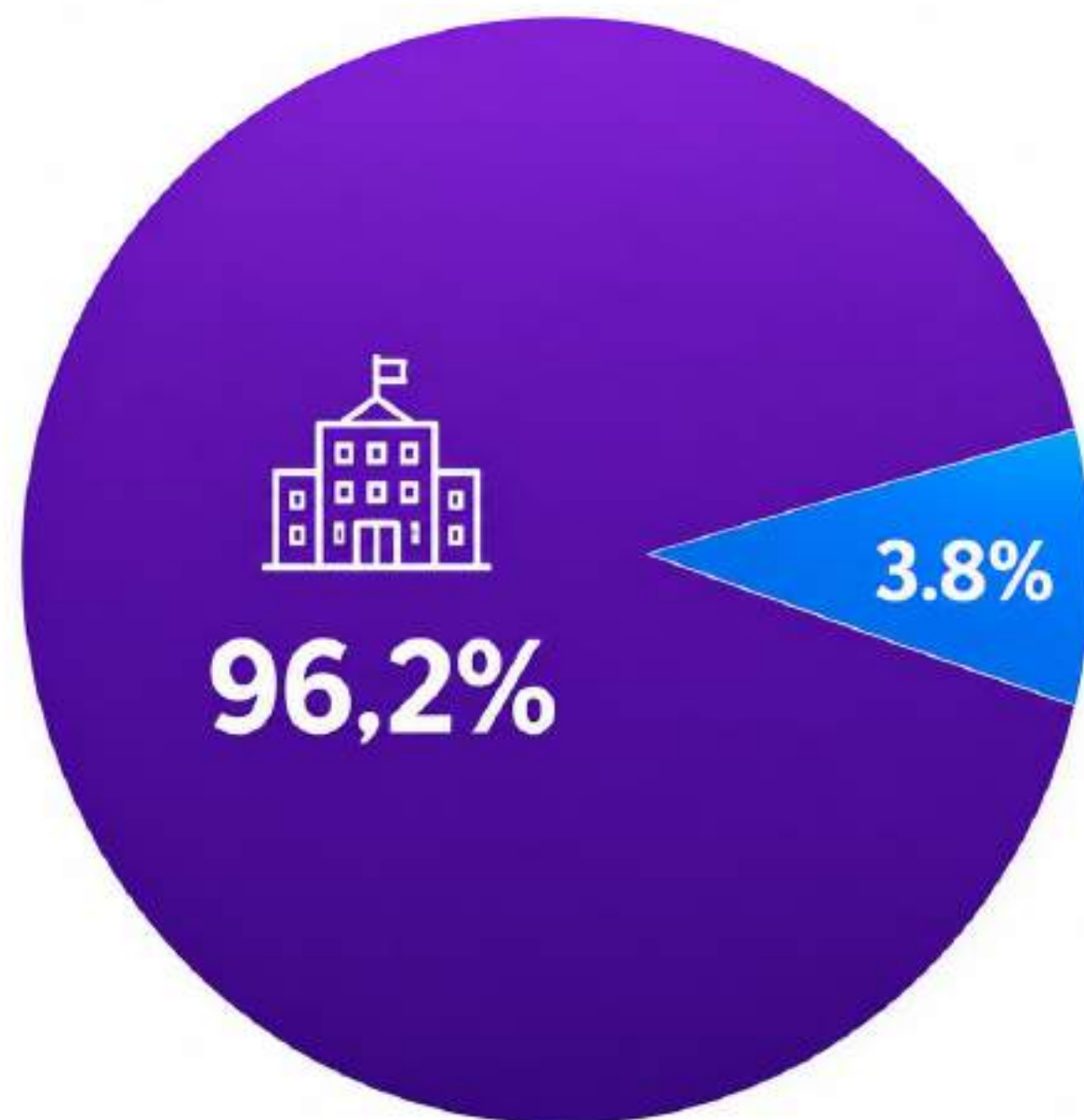


AVERAGE TRIP DURATION

(in months)



Method of payment for students' school fees



96.2%

Customers pay the agency, which then pays the school.

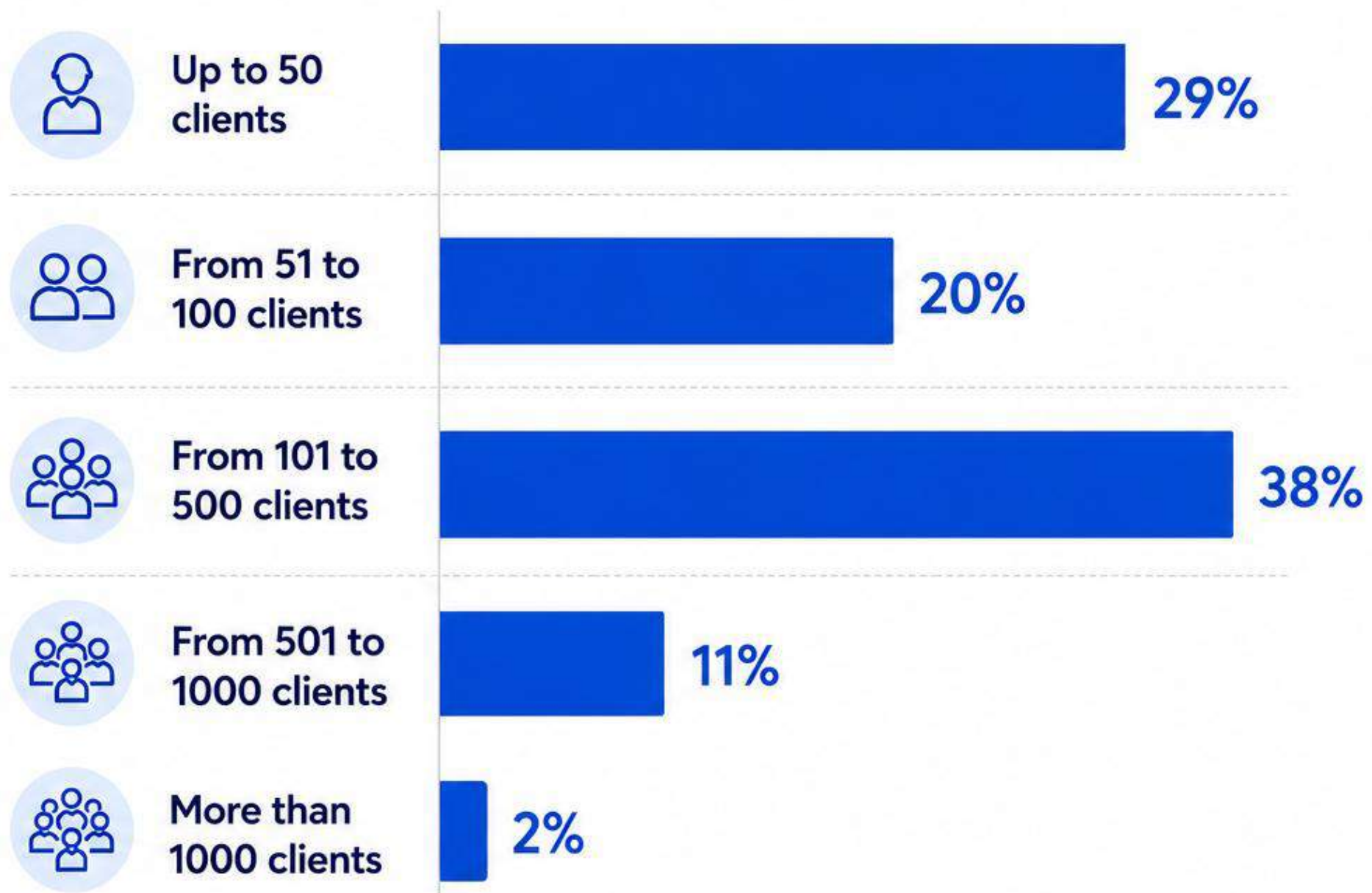


3.8%

Customers use a payment company to pay the school.

Average of clients per agency

Average number of clients managed per agency



Average clients per agency:

- ✓ in 2017: **375**
- ✓ in 2018: **192**
- ✓ in 2019: **281**
- ✓ in 2022: **349**
- ✓ in 2023: **441**
- ✓ in 2024: **442**
- ✓ in 2025: **376**

Average client investment (USD)

Average per client:
US\$ 8.283 (or R\$ 46.219)
(+14%)



- Up to US\$ 3 thousand **28%**
- From US\$ 3 thousand to US\$ 5 thousand **21%**
- From US\$ 5 thousand to US\$ 10 thousand **36%**
- Over US\$ 10 thousand **15%**

**TOTAL MOVEMENT
BY THE SECTOR IN 2025**

**R\$ 7
BILLION**

OR

**+ USD 1,25
BILLION**