UNESCO 2015
Brazil “Ups & Downs” in the impact on the use of ICTs in Higher Education

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Brazil Higher Education Market Overview & DL Key Points

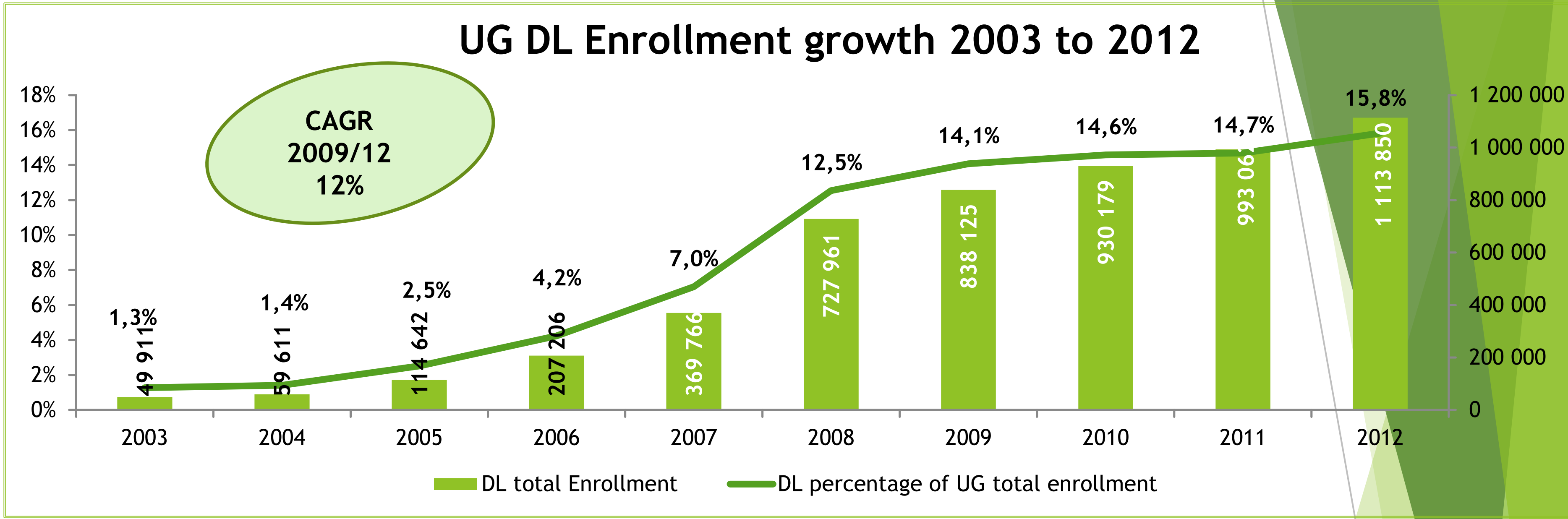
Brazil Higher Education Market

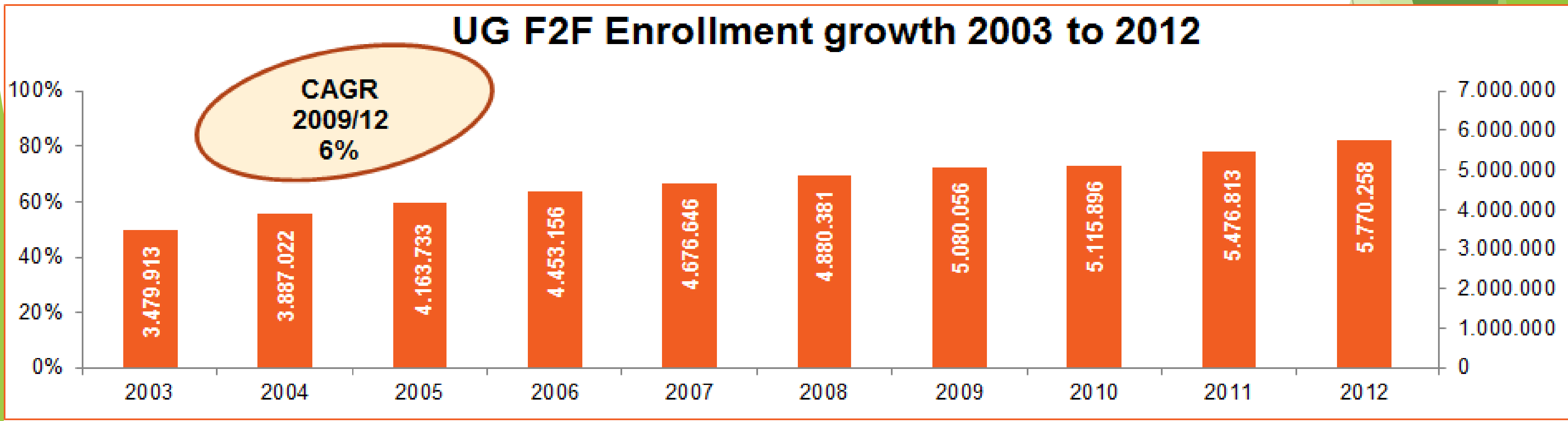
- UG Market Size (2012): 7 M (5.1 M private)
- UG Market CAGR (‘10 - ’12) : 5.0%
- DL UG enrollment (2012): 1.1 M
- Mix: 73% private / 27% public
- Regulation: comprehensively normative, stronger enforcement on quality standards
- Opportunities: Hybrid Programs as a trend

Key Points

- Average age UG: 33 YO for DL; 24 YO for F2F
- DL Population target (25 to 45 YO): 25 million urban area
- Internet users in urban area: 54% class C/D; FB 90% of internet users
- UG Government enrollment target in 2022: 10 million (30% DL)

Brazil DL vs. F2F Enrollment Evolution: 2003 to 2012





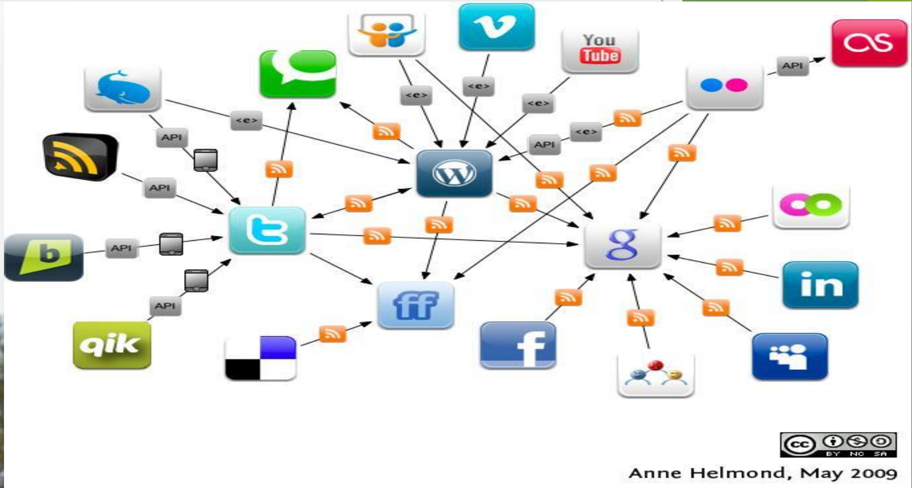
MoE Brazil – HE Census 2012

Brazil F2F vs. DL Undegradutate Socio-Demographics

Brazil UG Socio - Demographics	F2F	DL
Male	45 %	31 %
Female	55 %	69 %
Income up to US$ 1,000 per month	26 %	43 %
Income higher than US$ 4,000 per month	25 %	13 %
Works & helps providing for the family	19 %	39 %
Married	19 %	52 %
Is the main income source	7 %	23 %
Age Average	24 yrs old	33 yrs old

MoE Brazil – HE Census 2010

Social Networks



Where are we going and why?

- 2002: 83% of dial-up internet
- 2003: 1.7 million internet users predominantly from classes A and B
- 2008: larger growth in Brazil DL predominantly via satellite – in the same year, internet users from classes C,D,E surpassed the number of classes A,B
- 2012: 48 million users (54% classes C,D,E)
- 90% of internet users are on FB

Where will we be at the end of this decade?

Satellite vs. Blended Learning / Small Cities vs. Metropolitan Regions

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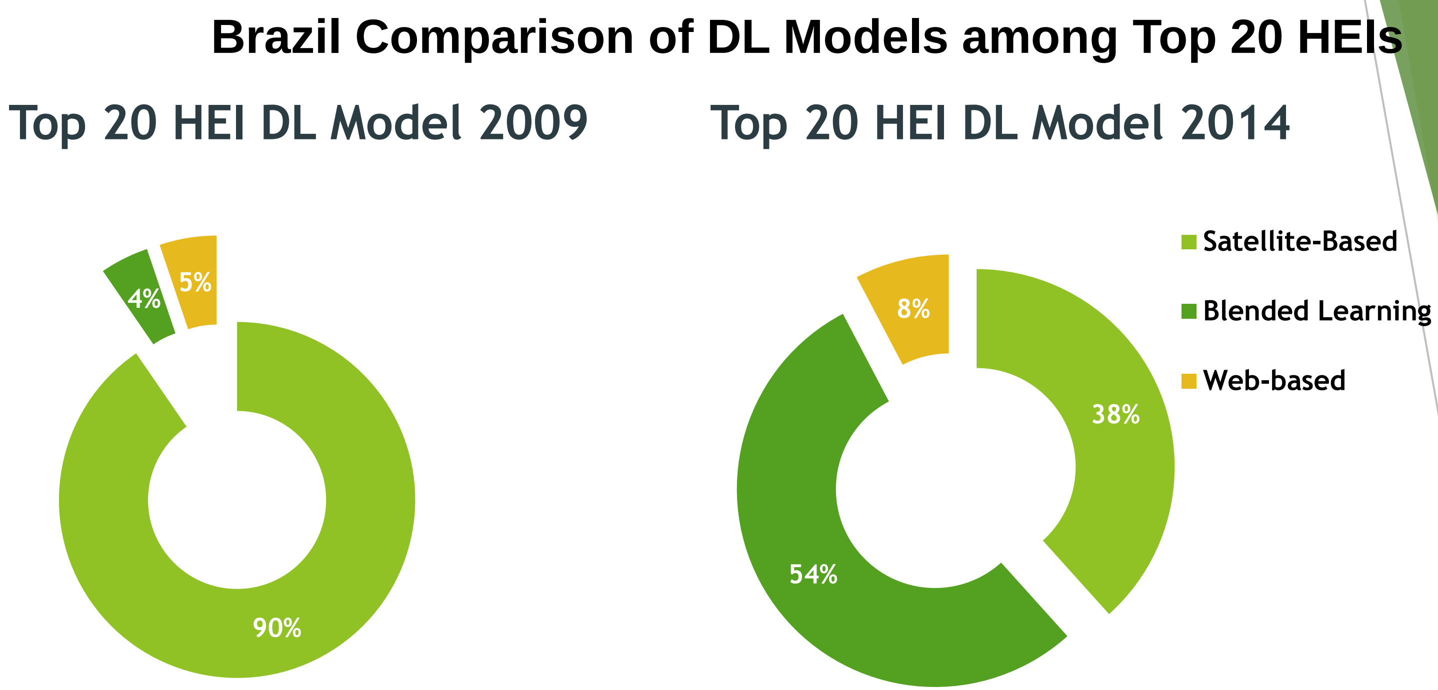
- ✓ Historically, largest DL players have grown in **smaller cities**, with pent-up demand due to the low offering of F2F institutions
- ✓ "**Social Experience**" of the meeting at the "polo" is aggregating
- ✓ Hoper → Demand in small cities is decreasing

- ✓ New wave of **DL growth** in the **Metropolitan Regions** of largest cities
- ✓ **Hybrid programs** via **internet** with games, video and **F2F chance** meeting
- ✓ Challenge to replace the **social experience** in the "polos"!

Comparison on the Top 20 HEIs DL Models: 2014 vs. 2009



- In 2009, 90% of the top 20 HEIs were delivering DL through Satellite-Based models
- However, **satellite-based model has been loosing space for Hybrid learning**, which is today the main DL delivery model used by the largest players (54% of the offering)
- Despite the web-based model growth in the period, the trend points to a consolidation of the hybrid education model

Where are we going and Why!

1. Catalogue Diversification – Innovative Products Creation;
2. Hybridization of DL and F2F – Blended Learning;
3. Use of Open Educational Resources;
4. MOOC – Offering as Marketing Strategy;
5. Editorial Players associating to Educational Players;
6. Mobile Learning, Gamification, Social Media and Flipped Class as trends;
7. Adaptive Learning starting up!

Why may we not get there!

1. Academic Staff lack of ICTs Training;
2. Brazil national pedagogical Curriculum lack of ICT contents;
3. Brazil student loan problem;
4. Broadband Availability and Costs;
5. DL restrictive regulations by Brazilian Government;

Thank You!
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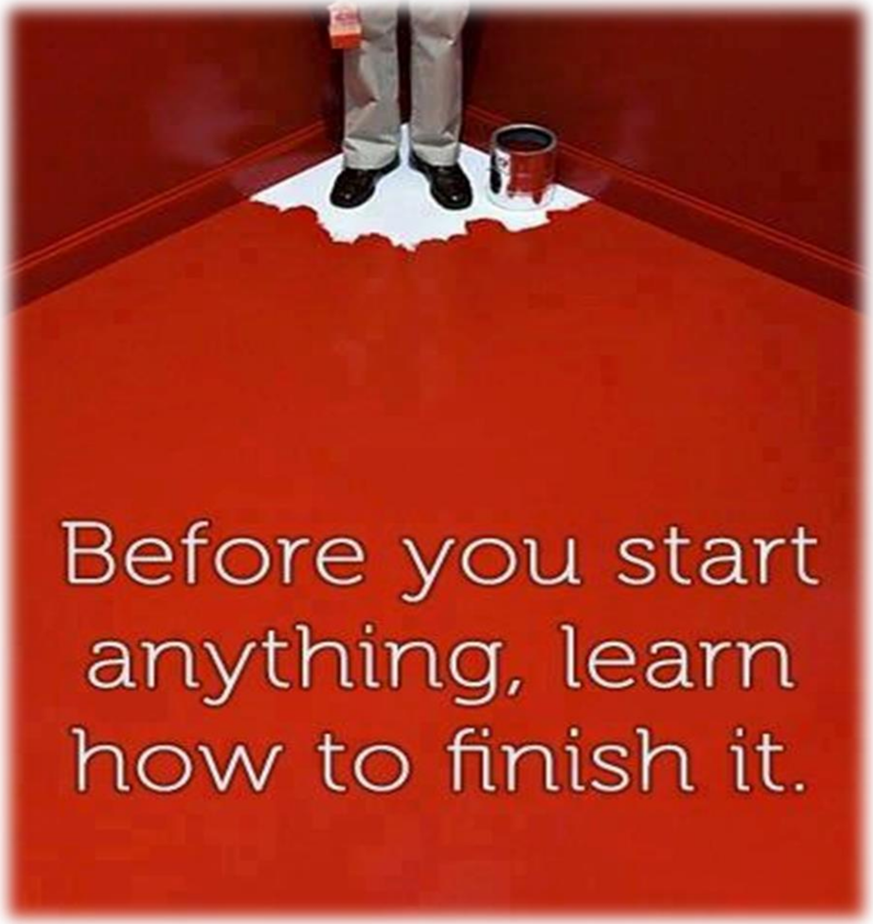

- “If you're not prepared to be wrong, you'll never come up with anything original.”
— Ken Robinson