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

- 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

UG DL Enrollment growth 2003 to 2012

- CAGR 2009/12: 12%

UG F2F Enrollment growth 2003 to 2012

- CAGR 2009/12: 6%

MoE Brazil – HE Census 2012
## Brazil F2F vs. DL Undegraduate Socio-Demographics

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

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

- 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”!
Brazil Comparison of DL Models among Top 20 HEIs

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