

EXECUTIVE SUMMARY

This study summarizes the results of bespoke research done on behalf of Languages Canada to map the current state of the global French language market.

Primary Research was designed and carried out by StudentMarketing, an independent market research provider, through analyzing data gathered from French language centres and education agencies in order to:

- Assess the current state and market size of the international French language education sector and the market structure;
- Provide an overview of international student flows and identify priority source markets for Canadian institutions; and,
- Provide Languages Canada with practical recommendations on how to intensify their recruitment goals.

Among the key findings were:

Global market:

- The global French language education market is estimated to comprise 150,000 students annually;
- There are 326 institutions in four major destinations (Belgium, Canada, France and Switzerland) teaching French to international students;
- The market is largely dominated by adults – 87% of all students;
- France, as the leading destination, attracts 83% of French language students;
- The average length of stay in 2014 stood at 8.2 weeks for adult students and 2.4 weeks for junior students;
- Individual institutions' course structures are still rather diverse when compared to the English language market;
- Globally, the top source markets were Italy (13%), Switzerland (9%) and Germany (8%);
- Direct bookings account for, on average, 51% of all students – agent usage stands at 24%.

The Canadian perspective:

- Canada welcomes 9% of all internationally mobile French language students;
- In 2014, the top source markets were Brazil, the USA, Mexico, Switzerland and Colombia – altogether, these markets accounted for 60% of students coming from outside of Canada;
- The domestic demand for French is also significant (38% of all students at Languages Canada member programs came from within Canada);
- Canada exhibits the highest use of agents (34%) – Canadian institutions tend to take advantage of their overall agent network that also promotes English language courses (which can be turned to a competitive advantage for the destination);
- Canada's major opportunities lie in expansion to potent source markets (e.g. Italy, UK) and supplying the existing agent network with additional tools and resources to promote French language courses.

Agency market specifics:

- 70% of agent respondents promote French language courses abroad;
- French language students compose 8% of all language travel students sent by agents;
- Agents report General French to be the most desired language course type, with 45% of their customers opting for it;
- Among the main reasons why students opt for Canada to learn French are: competitive pricing, bilingualism, proximity (applicable to North and Latin American countries), as well as quality of education;
- Agents claim that there are gaps in information provision and promotion of French language courses in Canada;
- The most preferred platform for agents wanting to learn more about these programs in Canada was FAM tours.