

## Executive Summary

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**T**his report presents findings from the 2013 Languages Canada annual survey conducted in April of 2014.

**All but three of the 212 member programs** at the time the survey was issued returned completed surveys, and no extrapolation of figures was needed.

The overall number of students at Languages Canada member programs decreased, from around 143,000 in 2012 to **just under 130,000 students in 2013**, despite an increase in the number of member programs. The average number of student weeks has remained roughly the same at an **average of 11.9 weeks per student**.

**Most students study at member programs for between 4 and 12 weeks and the highest proportion hold study permits.** Students studying in public sector institutions, or in pathway programs, stay for significantly longer periods of time. There were a minimum of **45,378 students who intend to continue to post-secondary studies, for example through pathway programs**, although the real number is likely higher as not all institutions are able to track and report this data.

Students studying in Quebec, and in other French member programs, **stayed for shorter periods of time and were more likely to be from Canada**.

The top five source countries for 2013 were: **Japan (17,990), Brazil (17,656), China (14,426), South Korea (14,100) and Saudi Arabia (11,162)**. Long-term trends in student numbers show a drop in students across all markets, but particularly from Saudi Arabia and Spain.

Members clearly stated that their biggest challenges were **visa approvals, specifically denials or delays in the processing of student visas**. They were also affected by competition from other language programs.

Student bookings were mostly done individually. **Private institutions were twice as likely to use agents as public institutions**.

French programs showed different patterns in student numbers, with the highest number of students coming from **Canada (2,959), followed by the United States (590), Brazil (576), Mexico (447) and Colombia (224)**. Additionally, French programs are more likely to employ staff seasonally.

Despite the lower number of international students, **French programs reported facing the same difficulties: visa denials, and competition from other programs**.

A number of regulatory changes at the federal and provincial level affected all member programs this year. **These changes include the loss of language co-op programs, which brought in 7,614 students in 2013**. The effect of these changes will not be fully realized for some time.

The top five markets of interest to our members were: **Brazil, China, Russia, Mexico and South Korea**.

Language students contributed **an estimated \$1,395,000,000 to the economy** in 2013 in tuition and living expenses.