



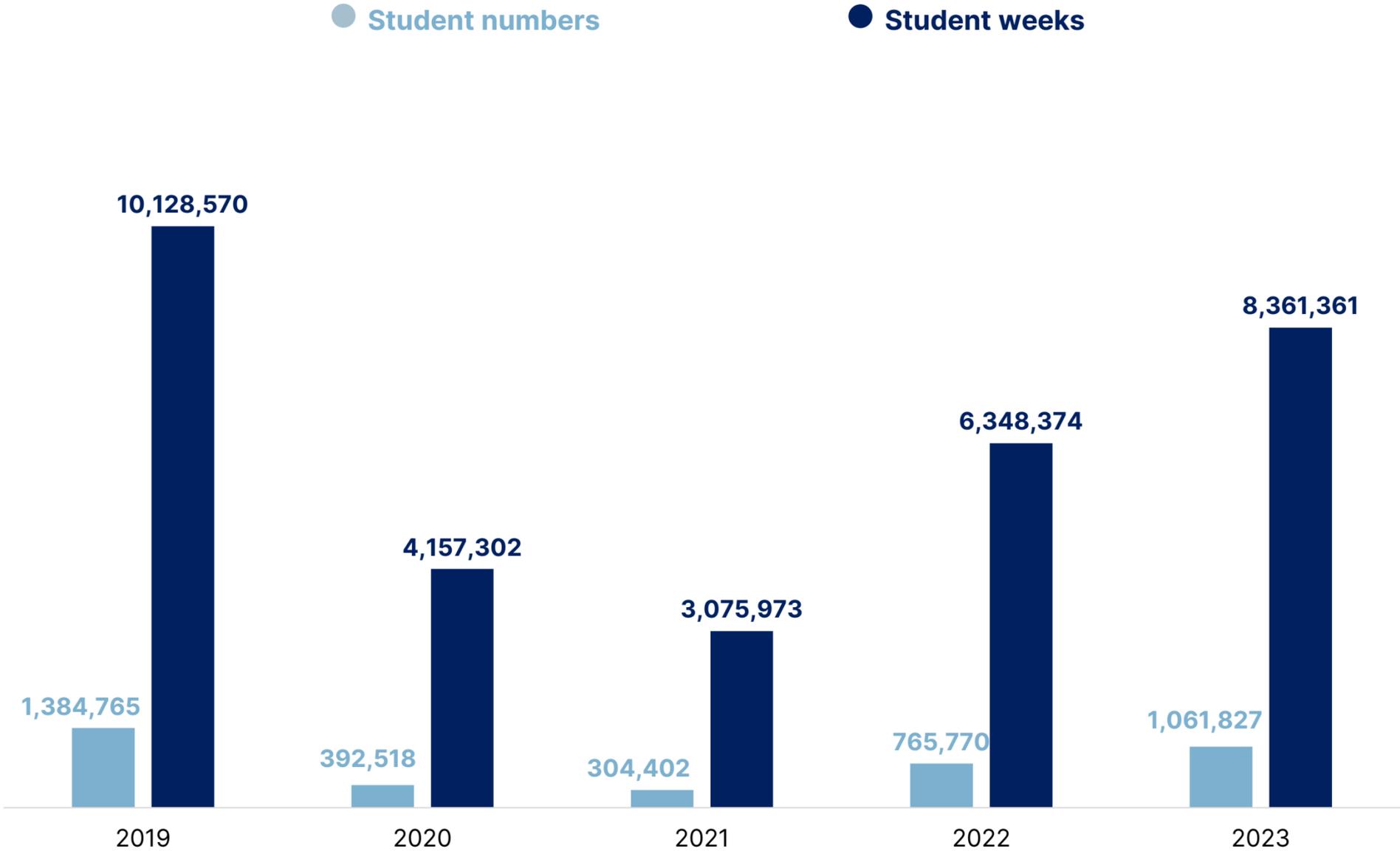
Canada's Official Languages Programs 2023 Annual Survey Report

Languages Canada Webinar

BONARD

Expertise in International Education

Global ELT market: Market size (preliminary data)



Recovery levels

77% of pre-pandemic student numbers recovered

83% of pre-pandemic student weeks recovered

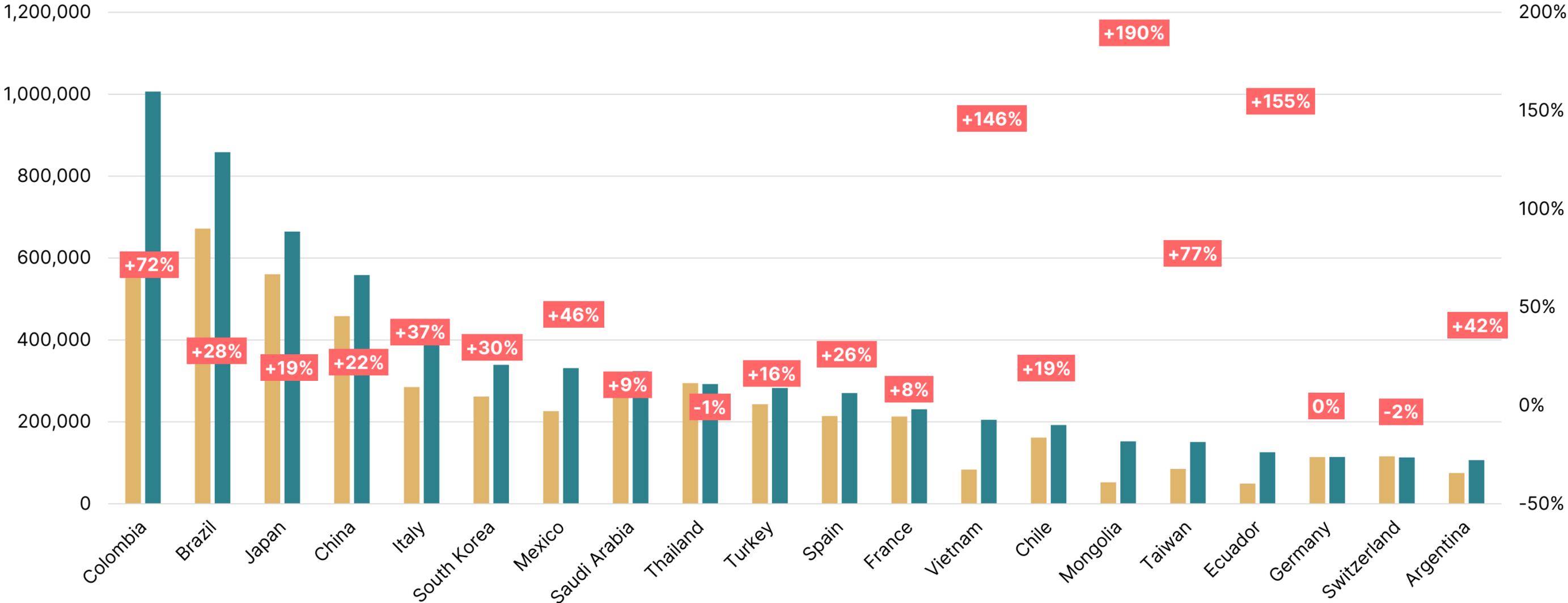
Source: BONARD, 2023; Institute of International Education, 2022; SEVIS, 2022; English Australia, 2023; English UK, 2023; Languages Canada, 2023; Marketing English in Ireland, 2023; National Statistics Office Malta, 2023; EduSA, 2023

Top 20 source markets globally (preliminary data)



STUDENT WEEKS

● 2022 ● 2023 ● 2022 vs 2023 change %

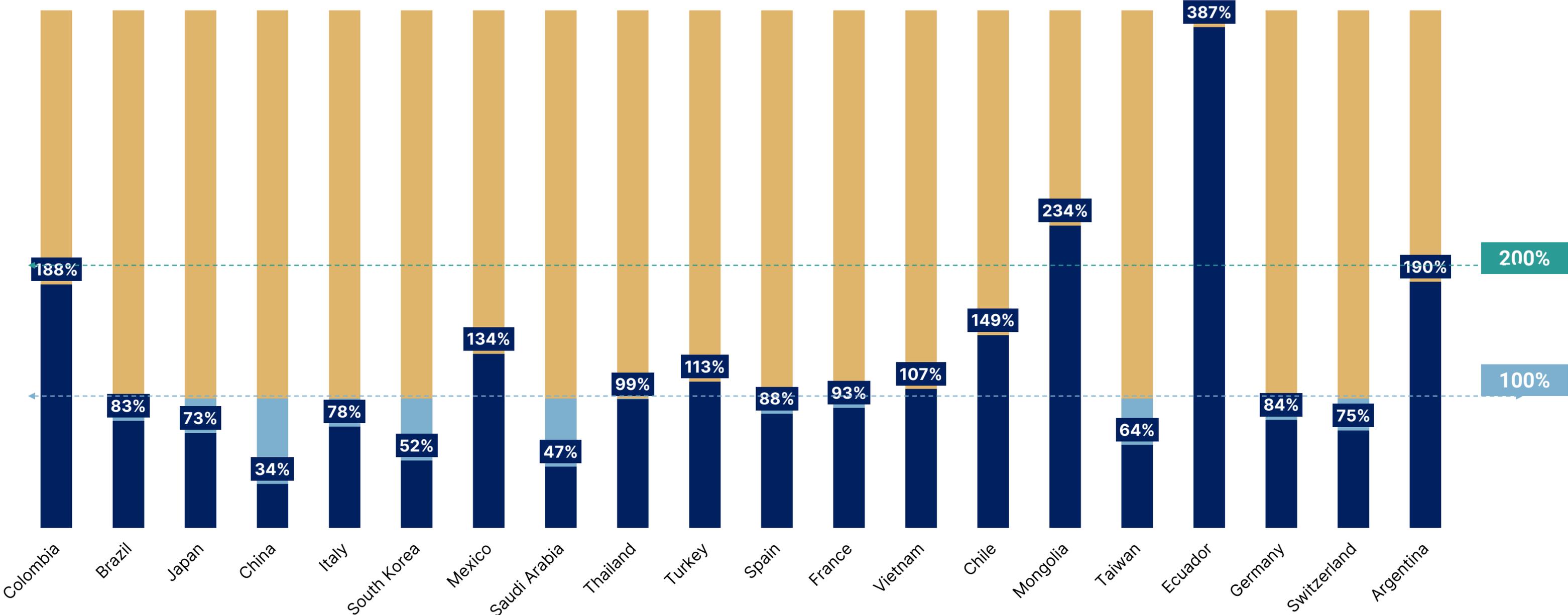


Source: BONARD, 2023; Institute of International Education, 2022; SEVIS, 2022; English Australia, 2023; English UK, 2023; Languages Canada, 2023; Marketing English in Ireland, 2023; National Statistics Office Malta, 2023; EduSA, 2023

Top 20 markets' recovery levels: Preliminary data



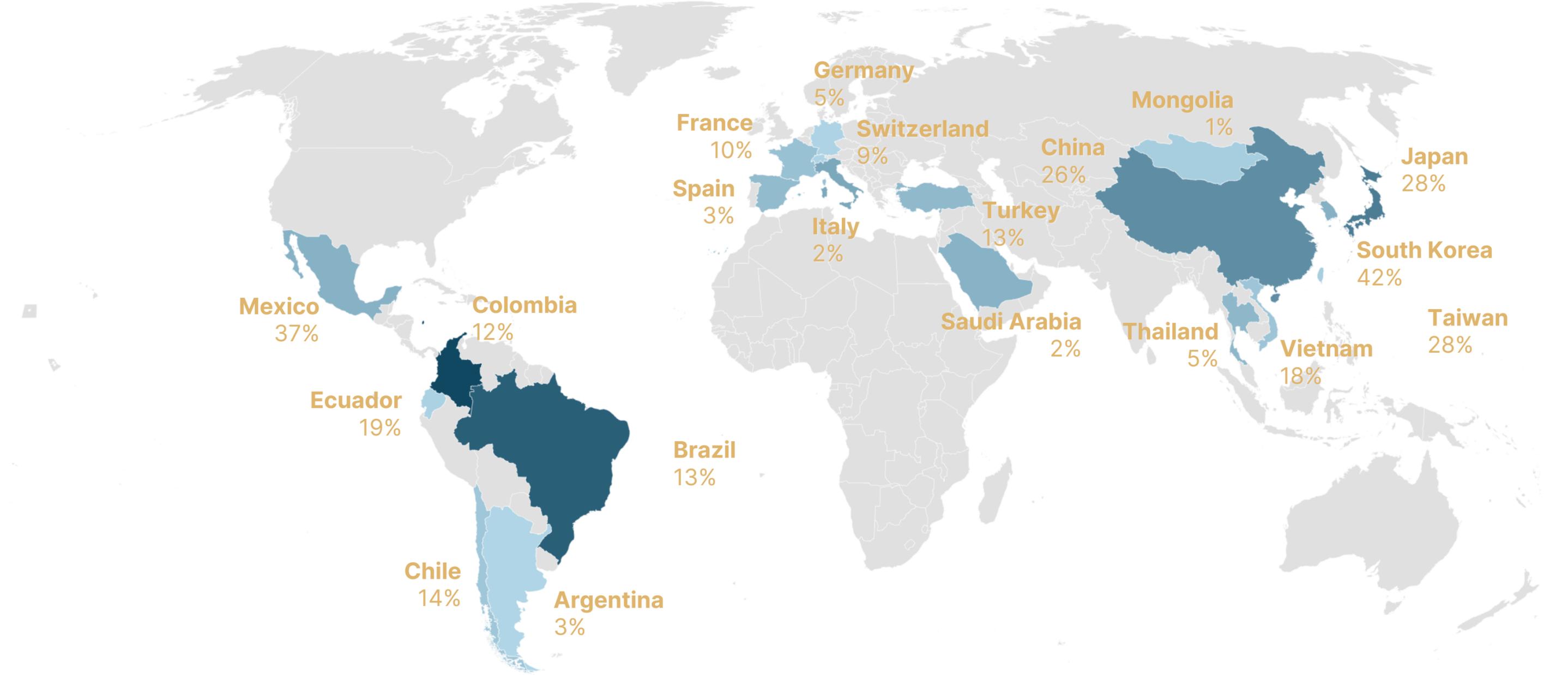
STUDENT WEEKS



Source: BONARD, 2023

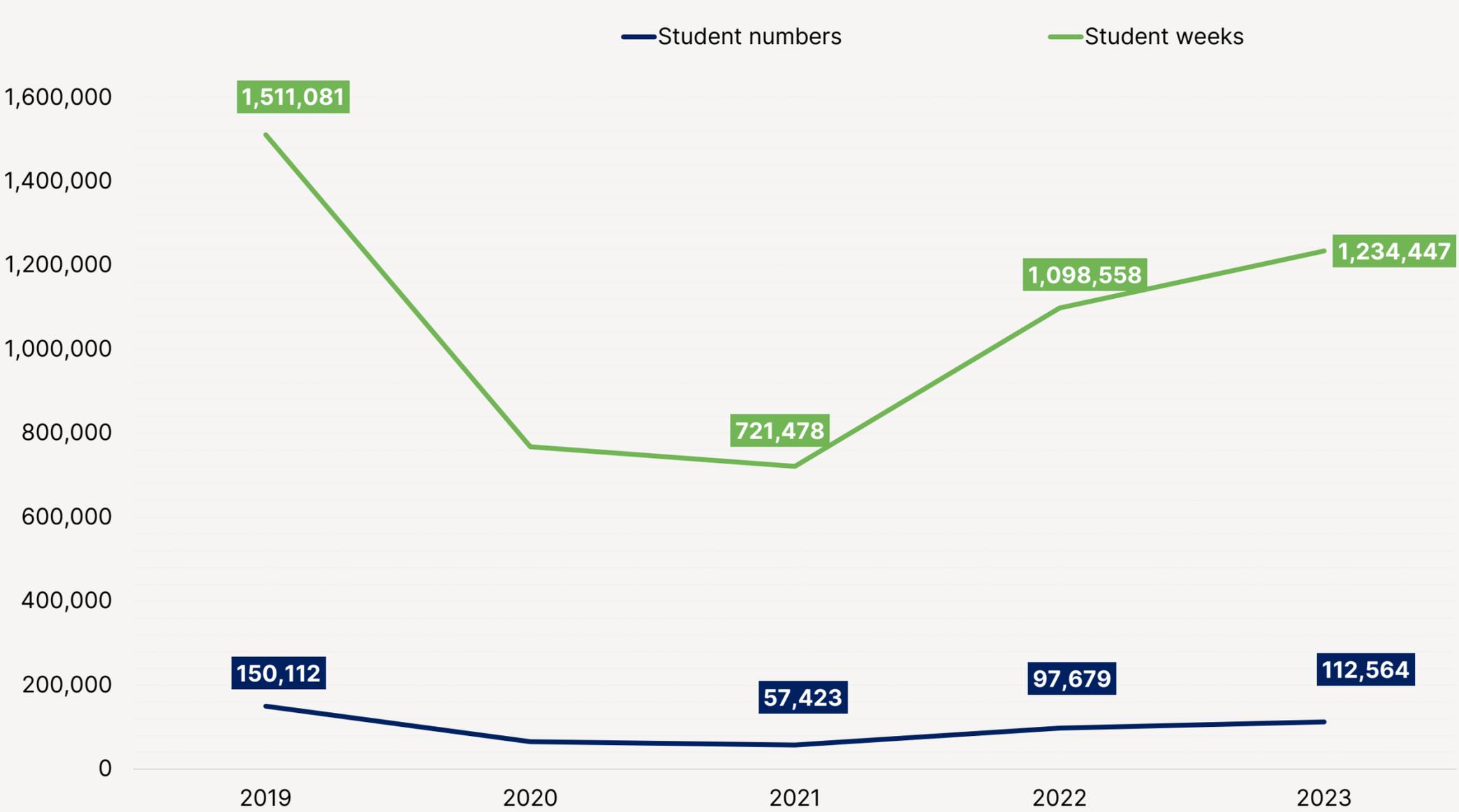
Note: Figures represent the percentage of 2022 student week volume as compared to 2019.

Canada's market share in top 20 source countries in 2023



Source: BONARD, 2023
Note: Figures represent the percentage of 2022 student week volume in Canada as compared to global performance of the source countries in 2023.

Market overview: Market size



Average course duration

11.0 weeks

Recovery levels

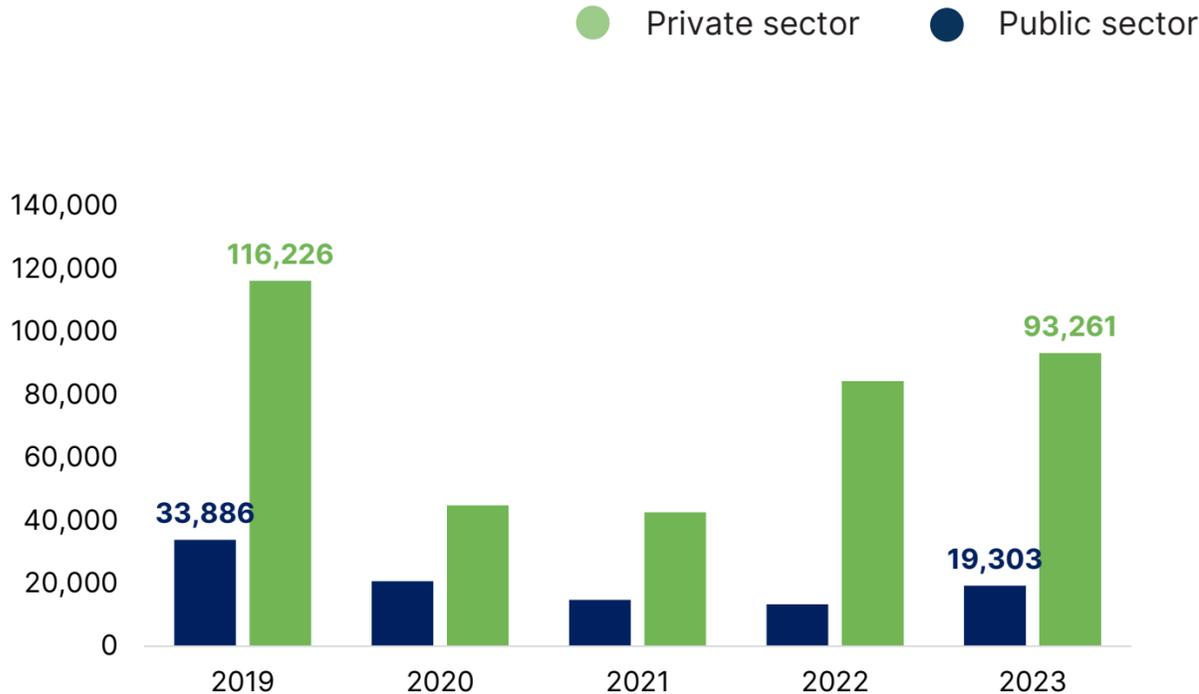
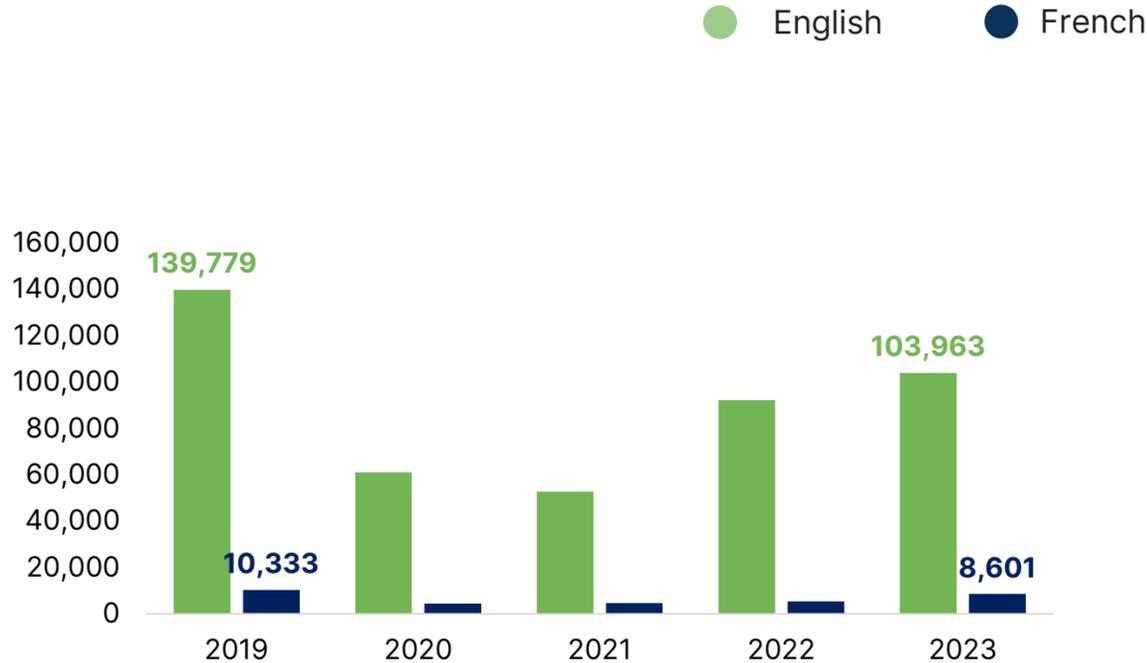
75% of pre-pandemic student numbers recovered

82% of pre-pandemic student weeks recovered

Source: Languages Canada & BONARD, 2023

Market overview: Market segments

Unit: Student numbers



English

Recovery levels

74%

French

Recovery levels

83%

Private sector

Recovery levels

80%

Public sector

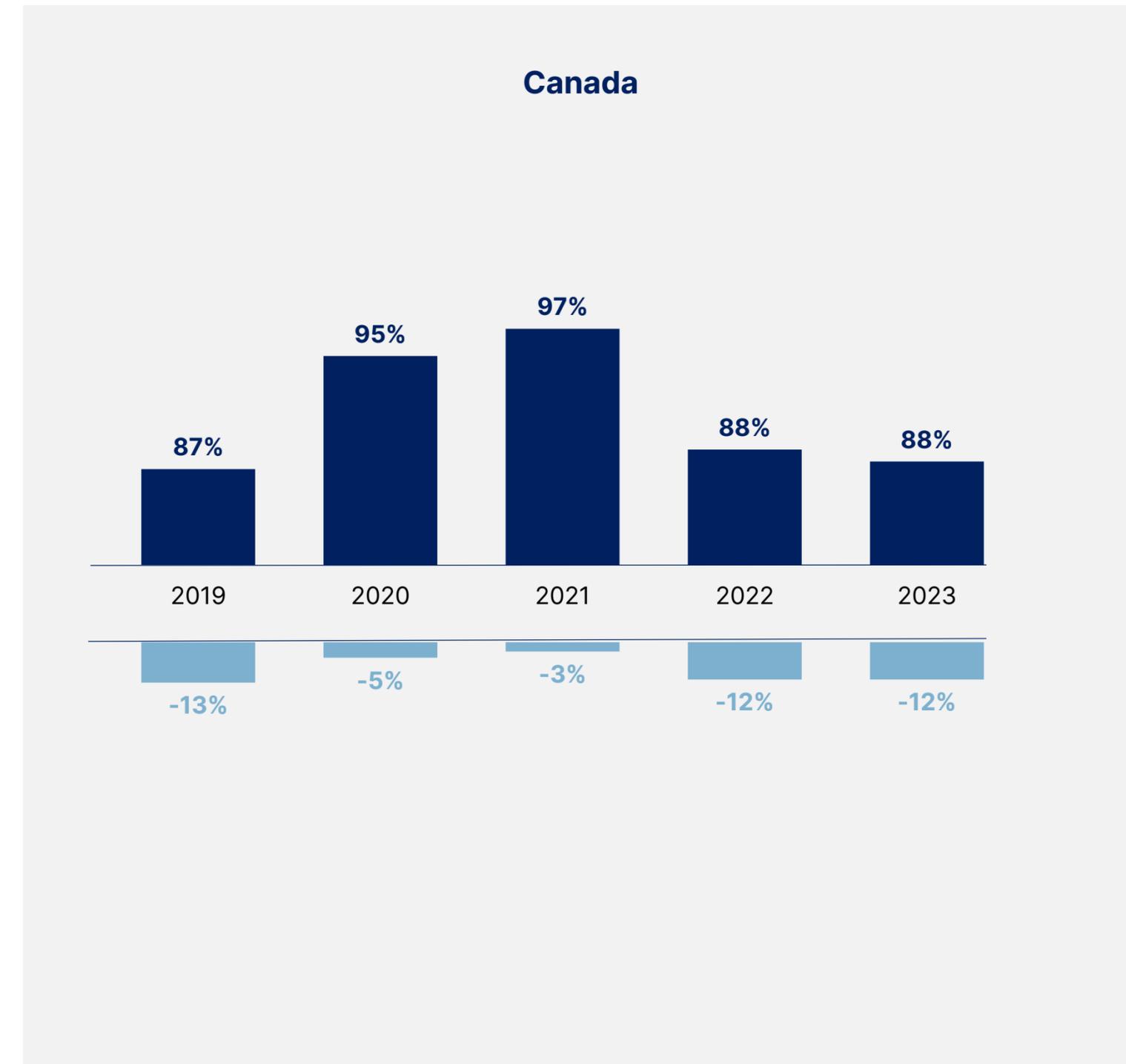
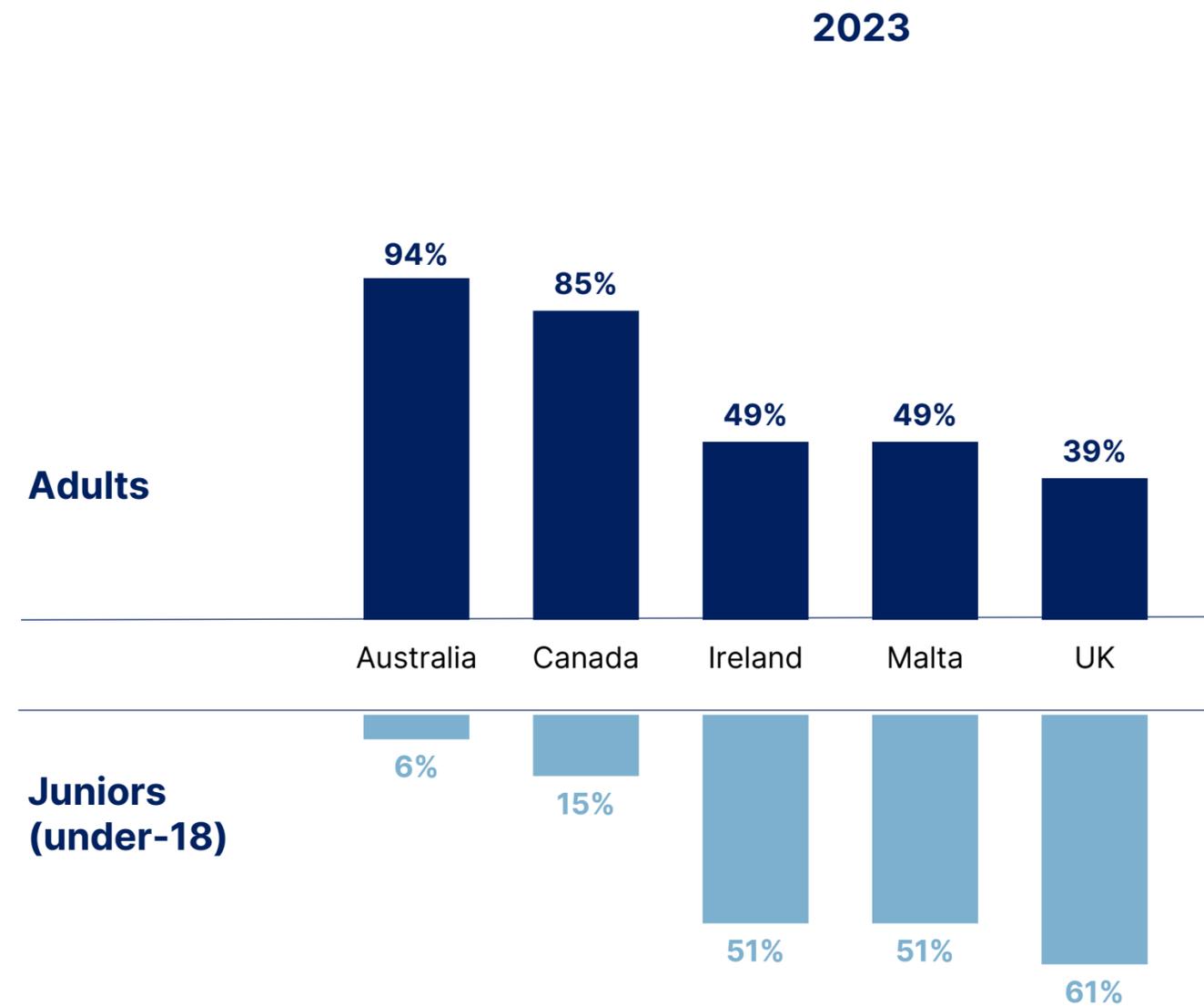
Recovery levels

57%

Source: Languages Canada & BONARD, 2023

Market overview: Age groups

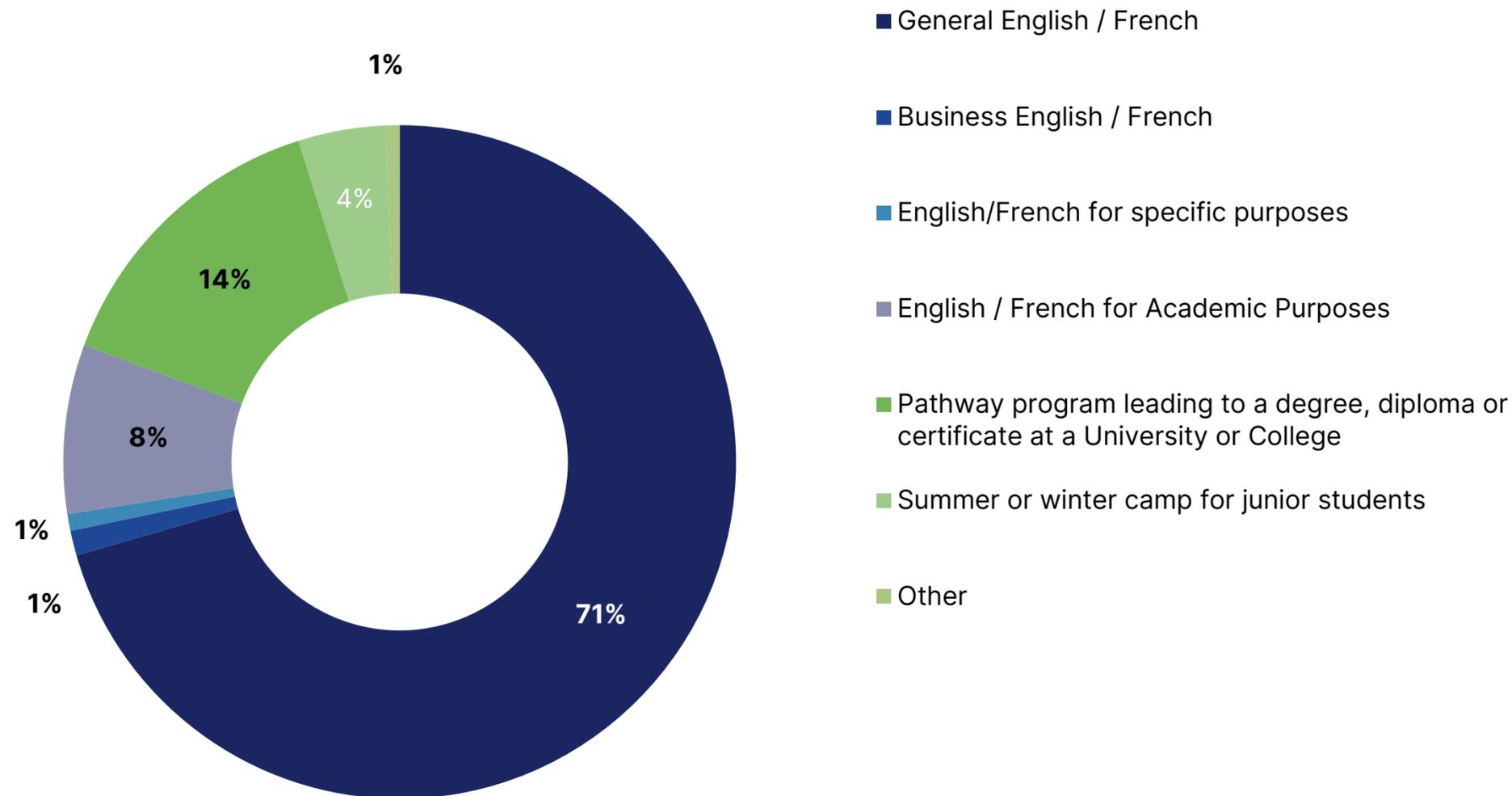
Unit: Student numbers



Source: English Australia, Languages Canada, English UK, MEI, English South Africa & BONARD, 2024

Market segments: Course types

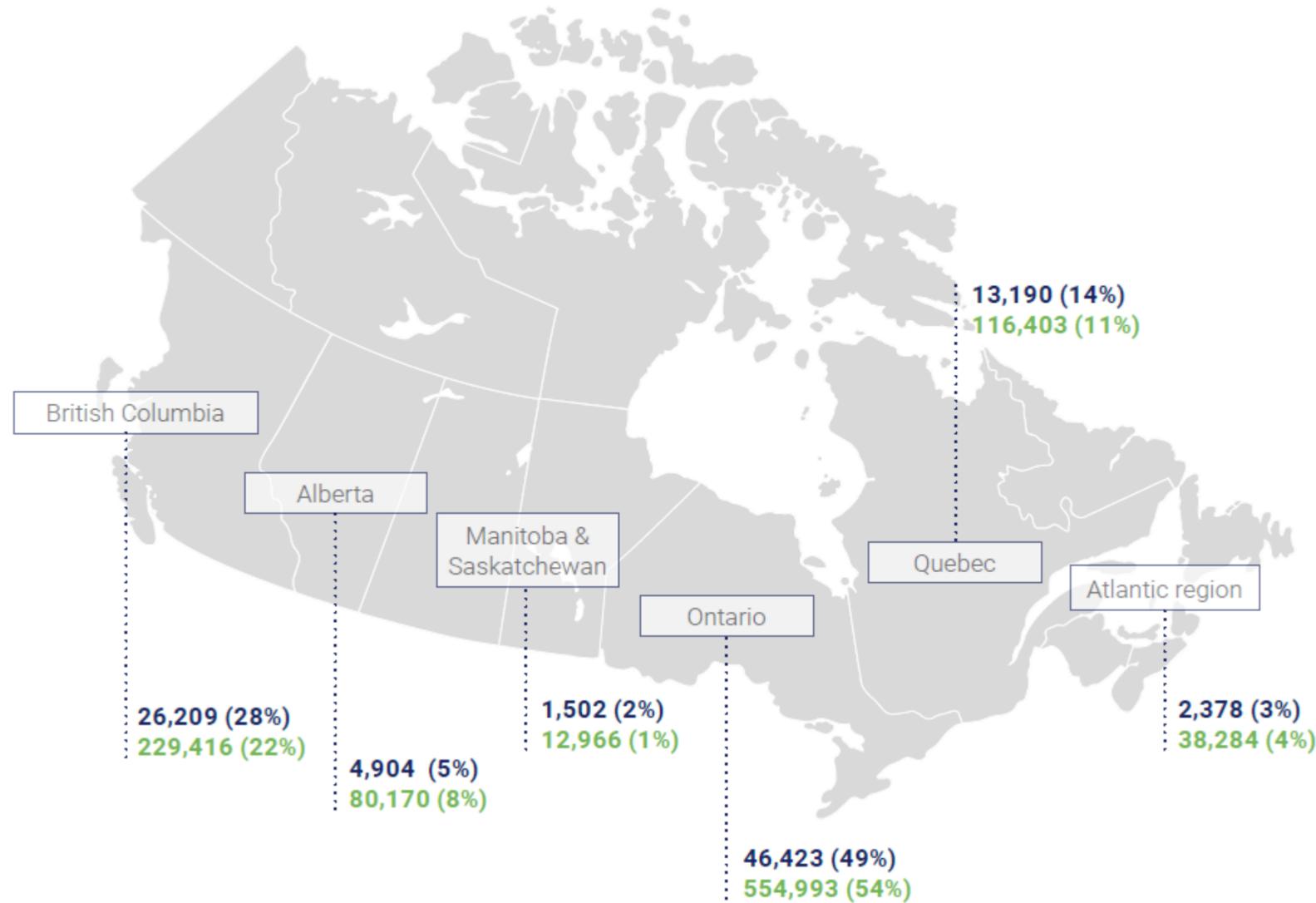
Unit: Student numbers



- **14,670 more students enrolled in General English/French compared to 2022**
- **2% less students studied pathway programs**
- **Summer/Winter junior camps reaching 33% of its pre-pandemic volume**

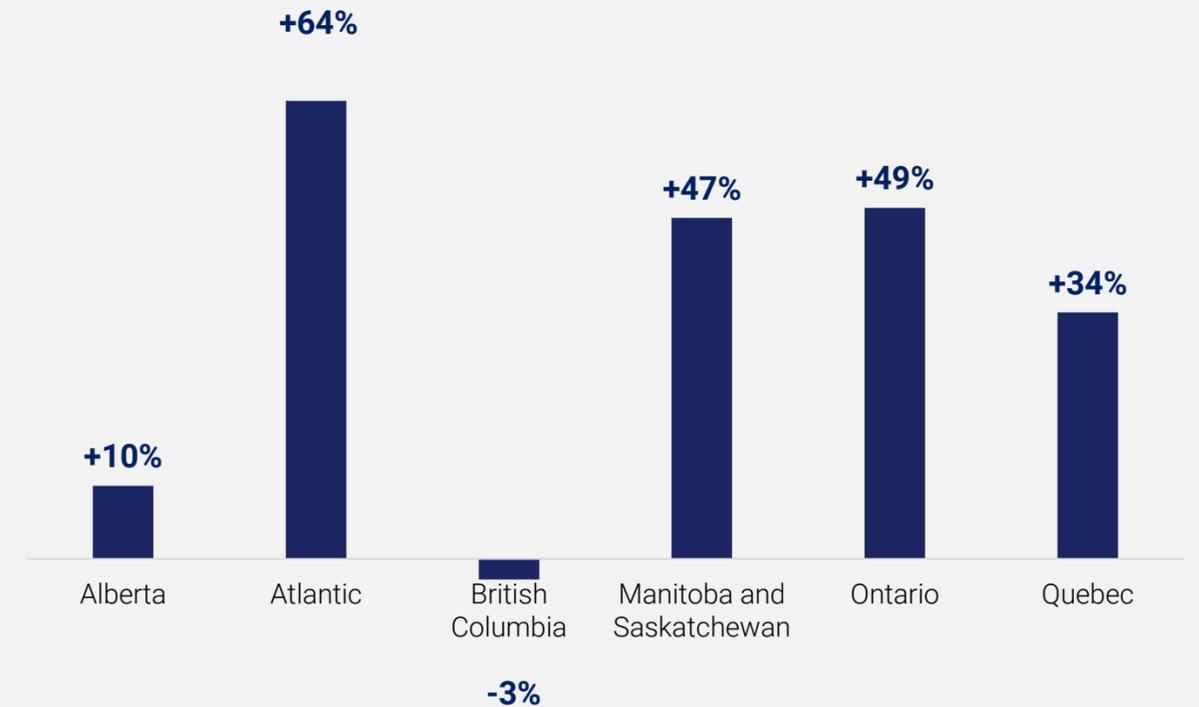
Regional overview: Students by program location

OF STUDENT NUMBERS (% OF TOTAL)
 # OF STUDENT WEEKS (% OF TOTAL)

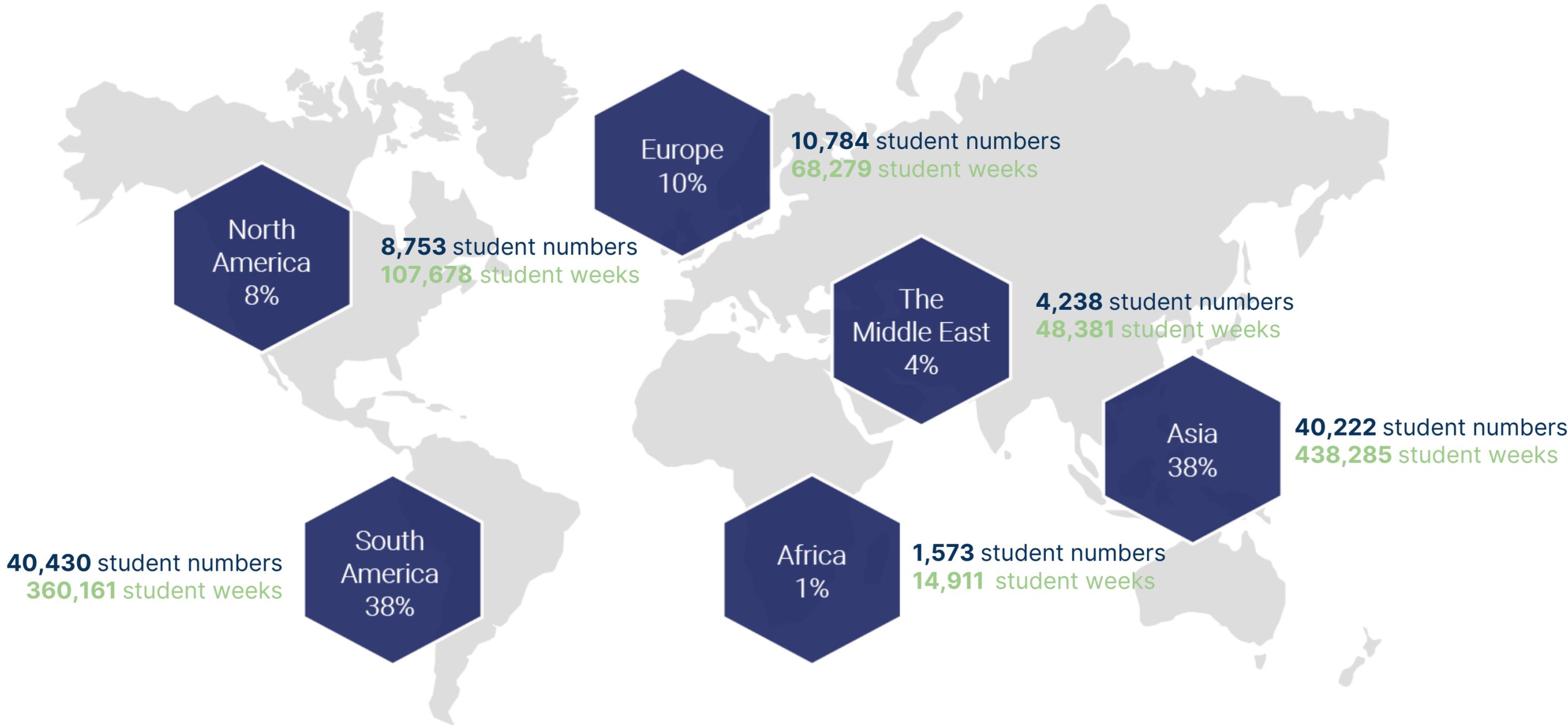


Year-on-year change (2022 vs 2023)

Unit: Student numbers



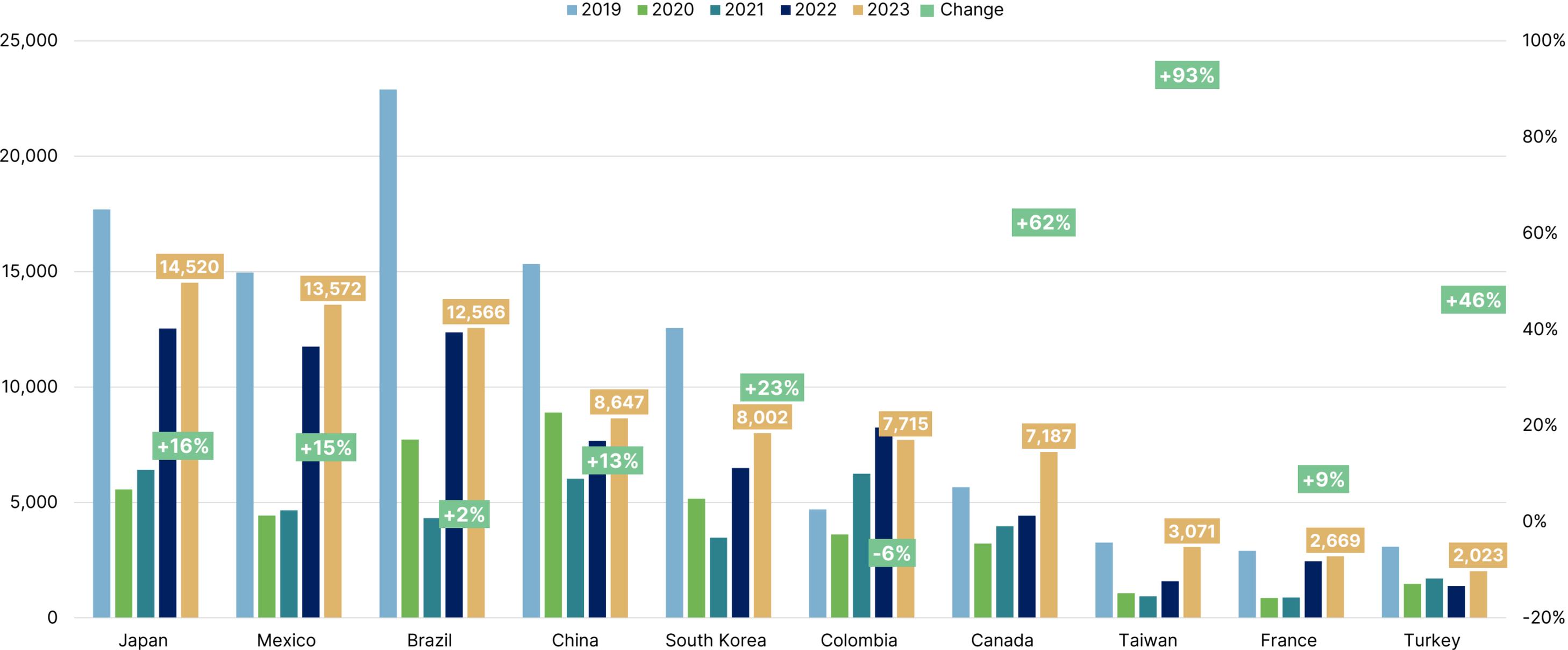
Source regions: Student numbers



Source: Languages Canada & BONARD, 2023

Source countries: Top 10 source markets

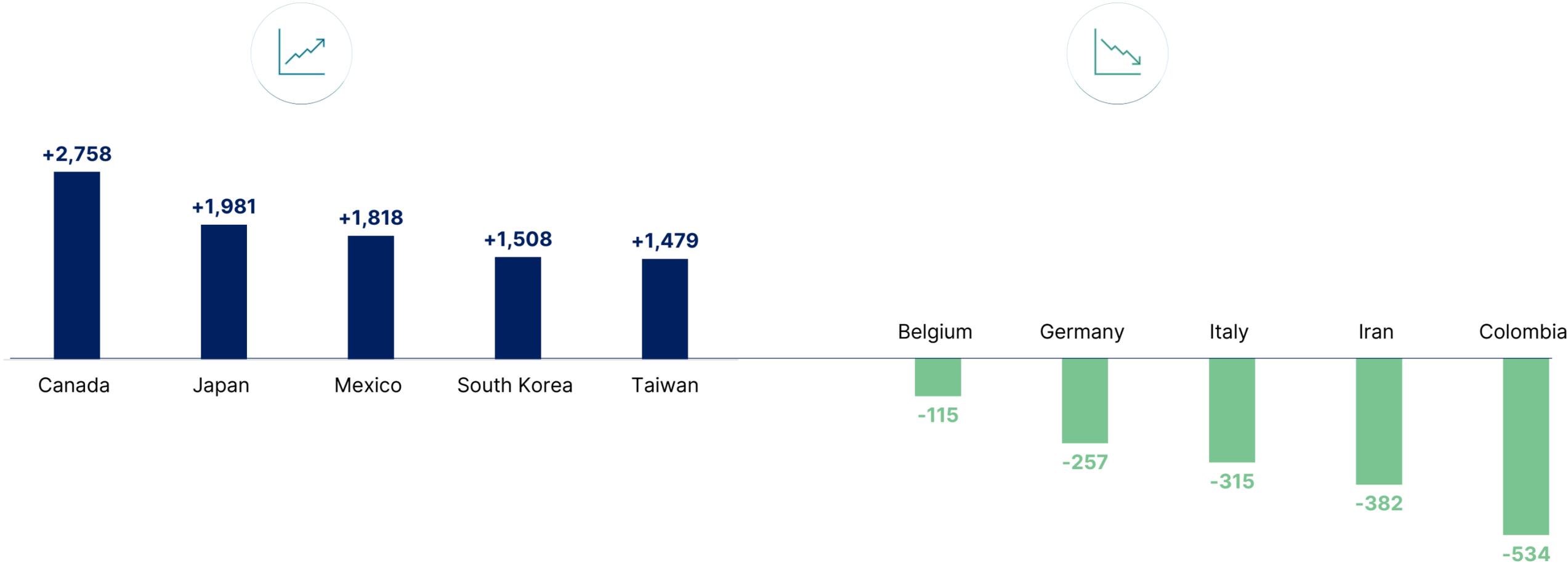
Unit: Student numbers



Source: Languages Canada & BONARD, 2023

Source countries: growing and declining markets

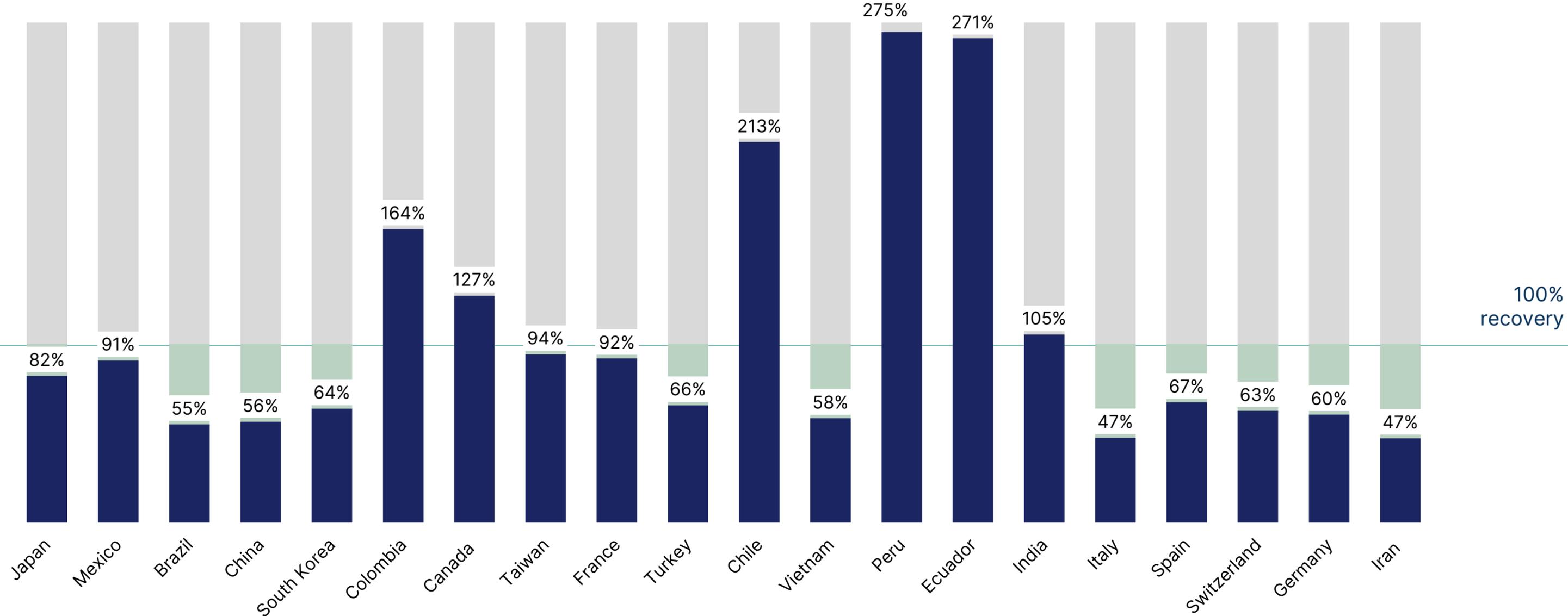
Top growing and declining markets between 2022 and 2023 (student numbers)



Source: Languages Canada & BONARD, 2023

Top 20 source countries: Recovery levels

Unit: Student numbers

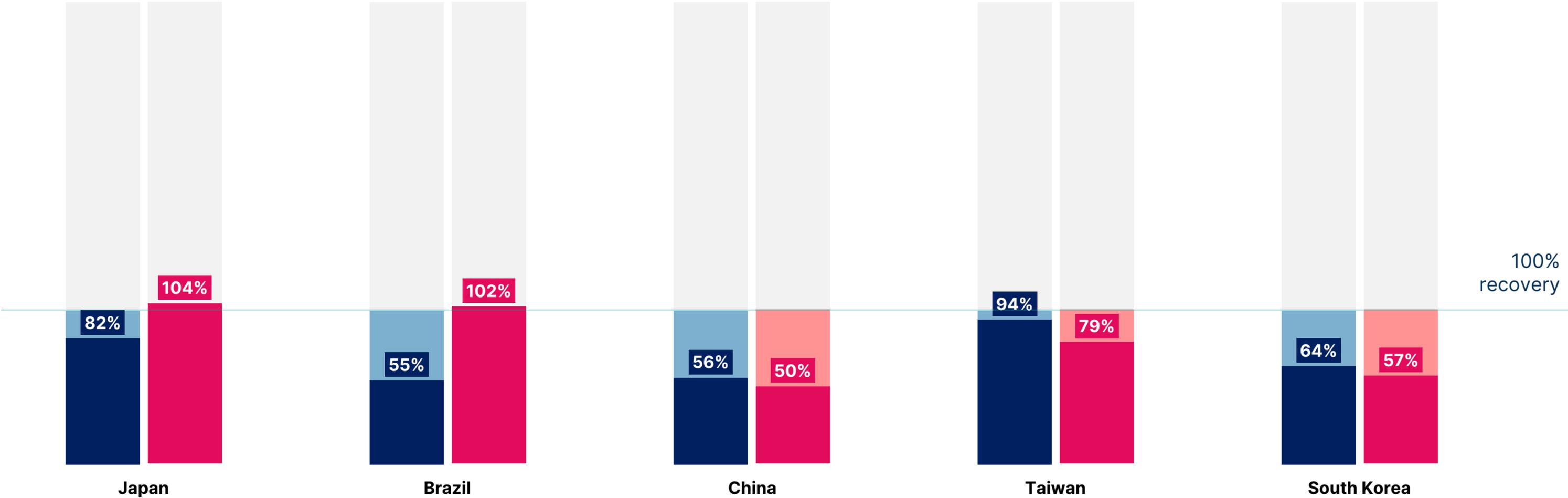


Source: Languages Canada & BONARD, 2023

Source countries: Recovery levels

Unit: Student numbers

● Canada ● Australia

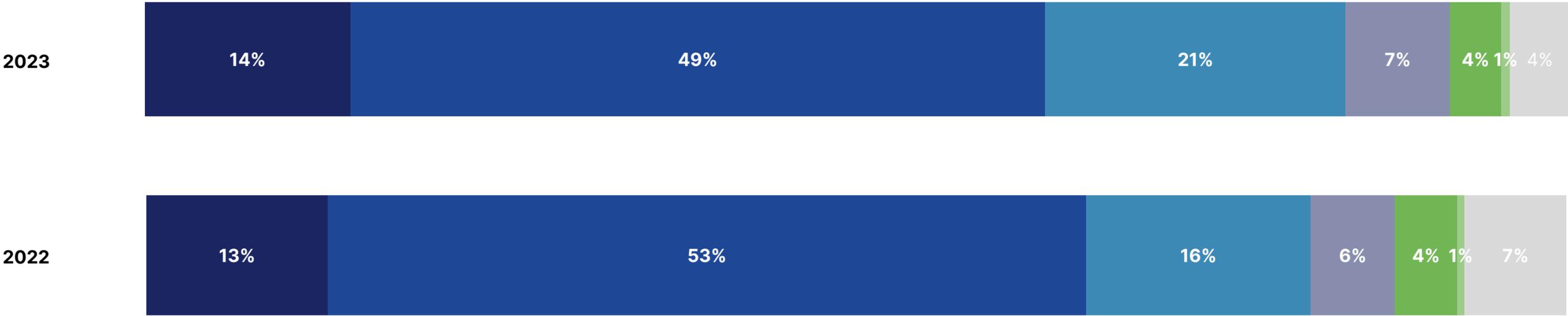


Source: Languages Canada & BONARD, 2023, Australian Government Department of Education, 2023

Recruitment channels: Booking sources

Unit: Student numbers

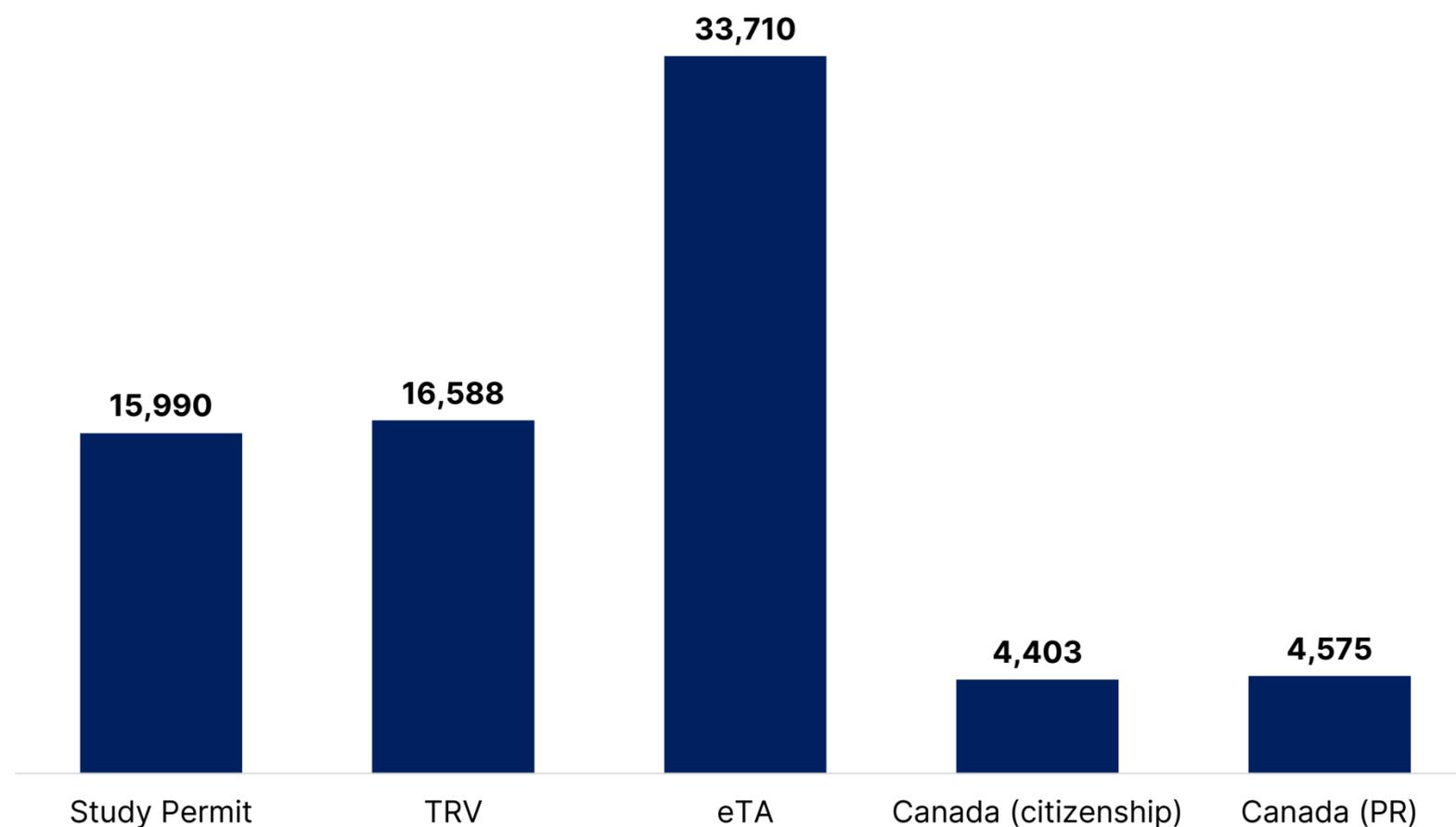
- Agents/Agencies (domestic/on-shore)
- Agents/Agencies (international/off-shore)
- Direct: Remotely
- Direct: In-person (walk-in)
- Institutional agreements
- Government scholarships
- Other



Source: Languages Canada & BONARD, 2023

Student demographics: Visa types

Unit: Student numbers



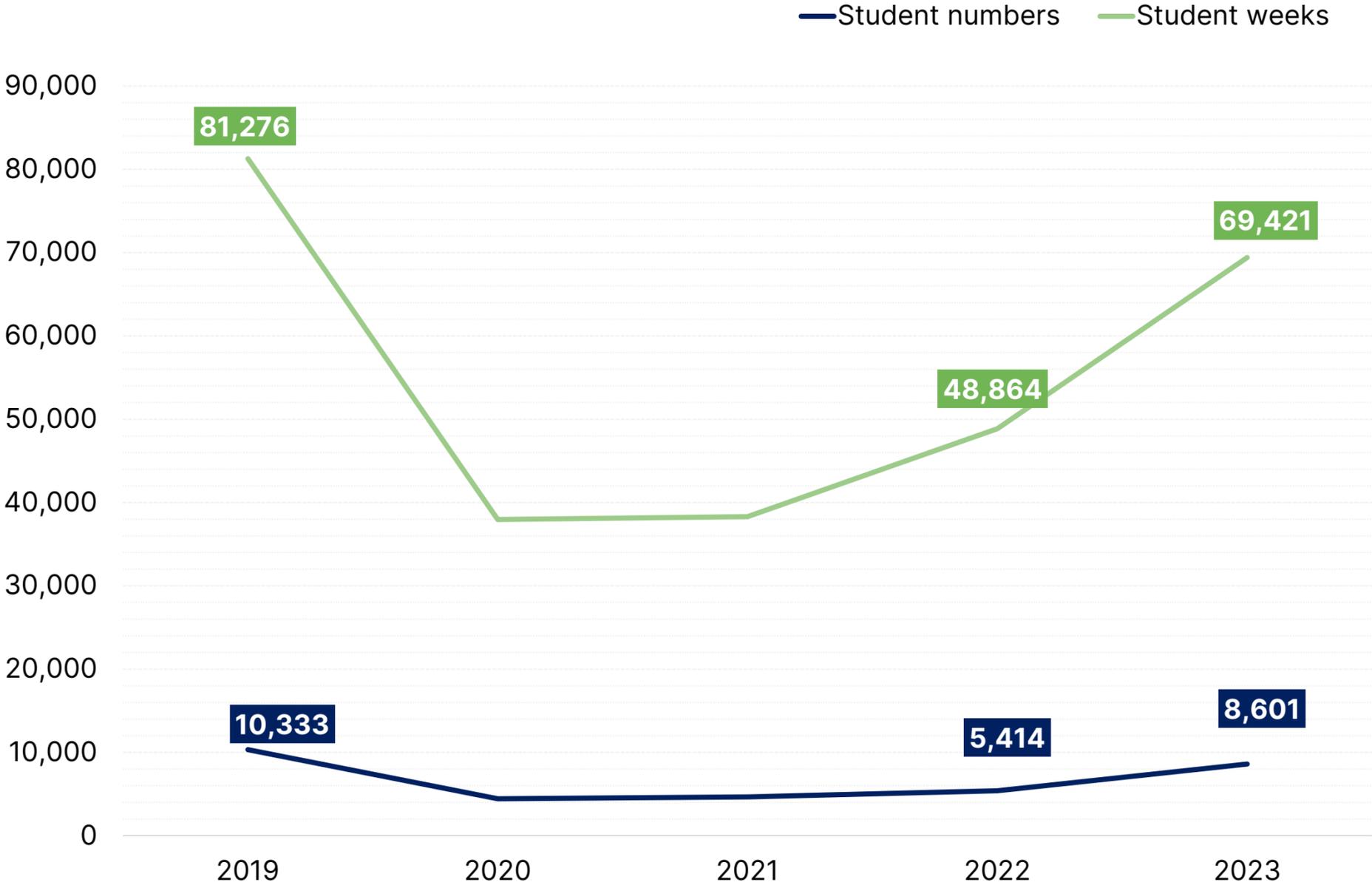
2,671

students were not able to travel to Canada due to TRV delays

4,479

students were not able to travel to Canada due to Study Permit delays

French sector: Market size



Average course duration



Recovery levels

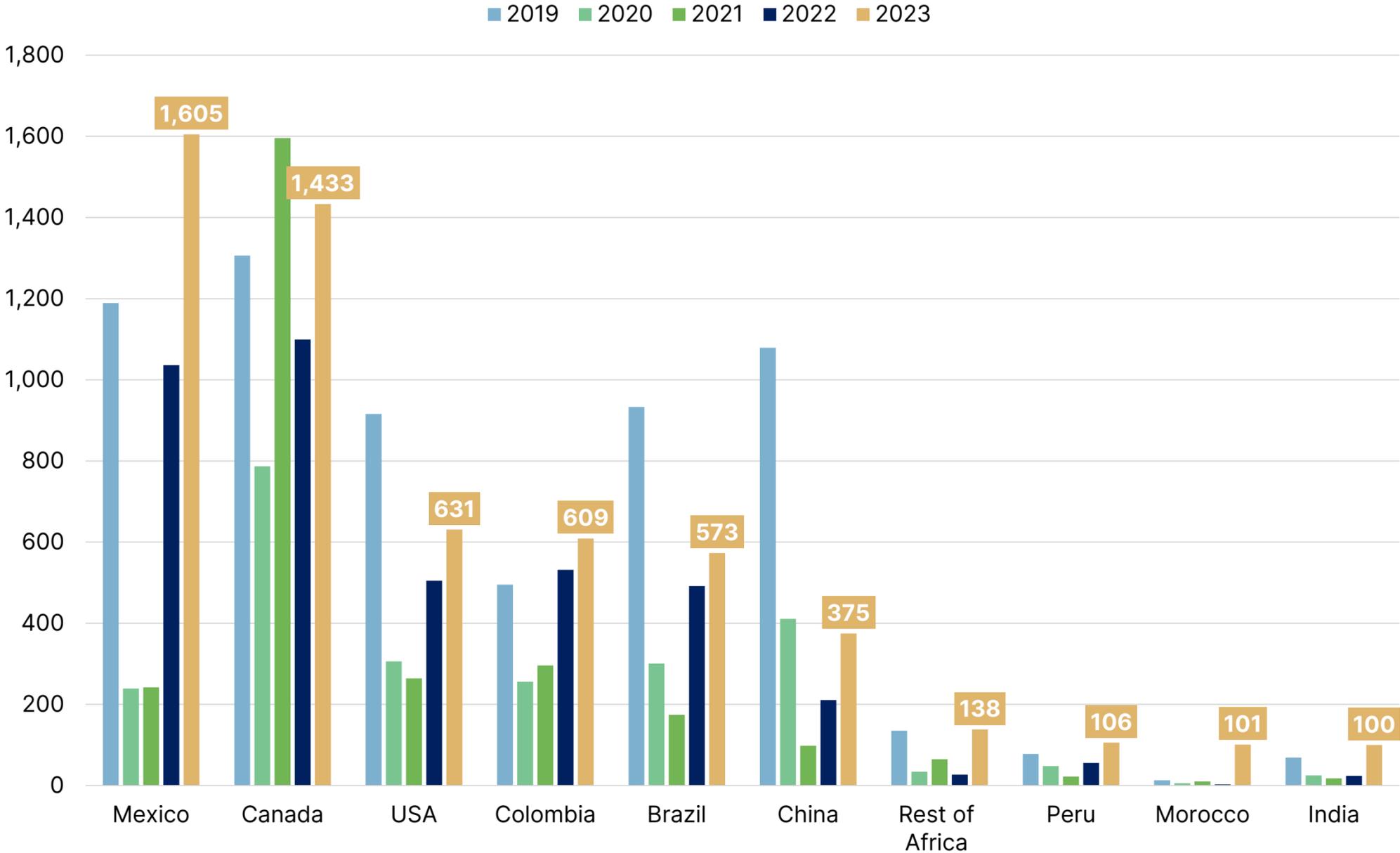
83% of pre-pandemic student numbers recovered

85% of pre-pandemic student weeks recovered

Source: Languages Canada & BONARD, 2022

French sector: Source countries

Unit: Student numbers



Recovery levels of top 10 source countries

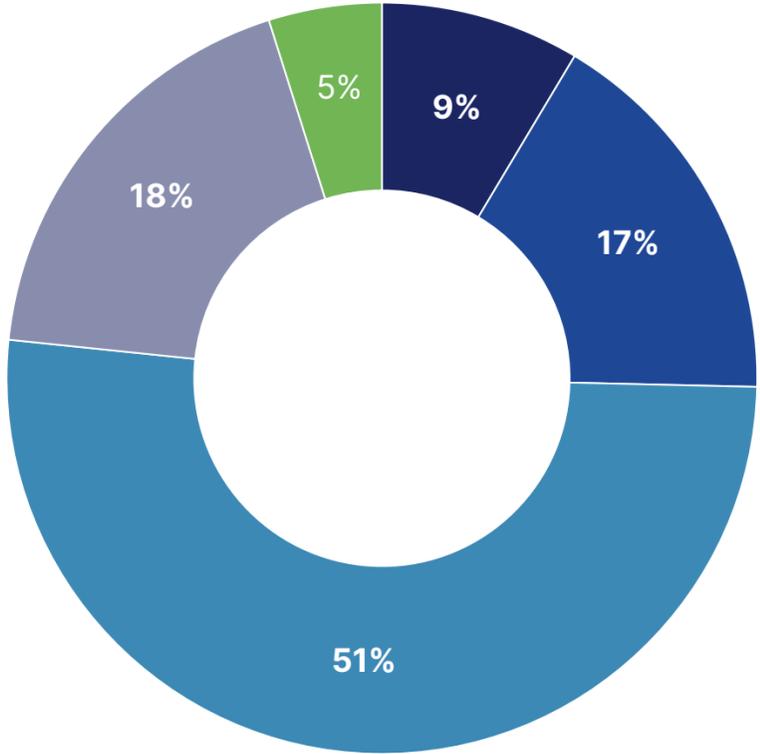
Mexico	135%
Canada	110%
USA	69%
Colombia	123%
Brazil	61%
China	35%
Rest of Africa	102%
Peru	136%
Morocco	777%
India	145%

Source: Languages Canada & BONARD, 2023

French sector: Student demographics

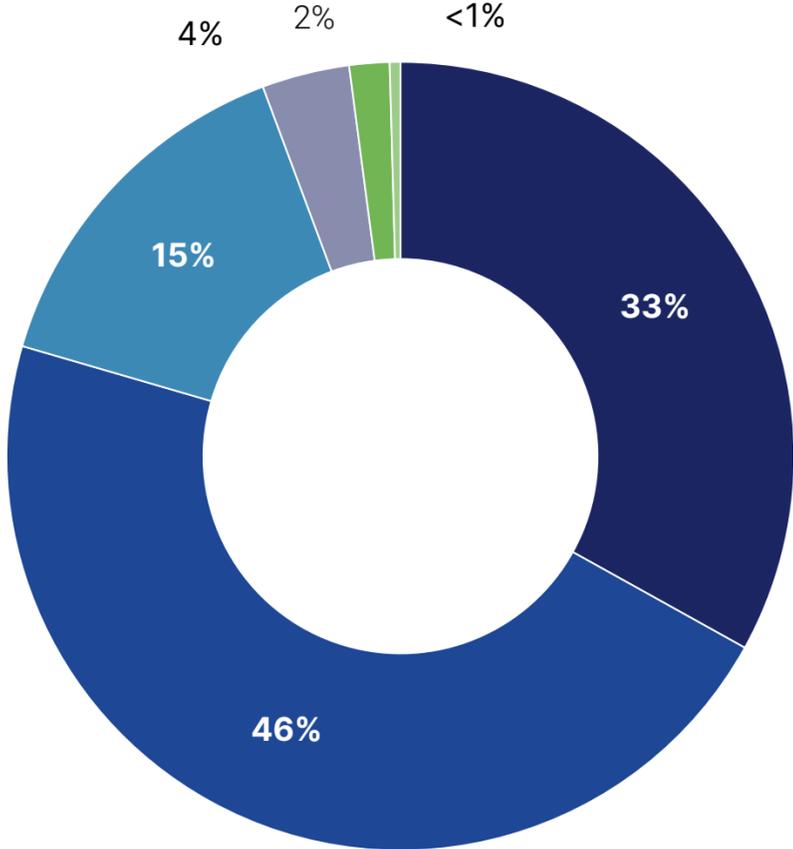
Student numbers
by visa type

- Study Permit
- Visitor (no visa required)
- From Canada (Permanent Resident)
- Temporary Resident Visa
- From Canada (Citizenship)



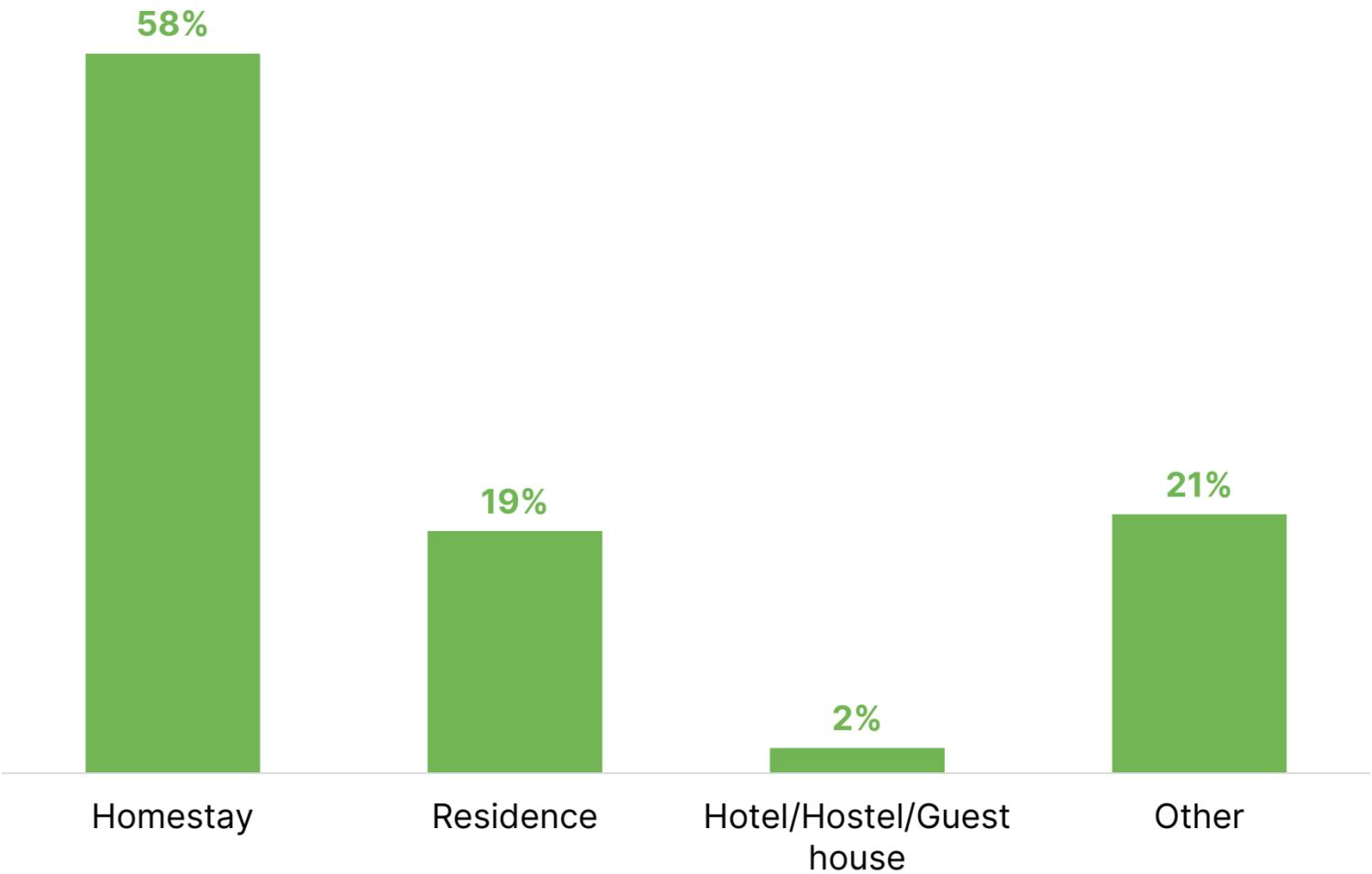
Student numbers
by course duration

- Less than 4 weeks
- 4-12 weeks
- 13-24 weeks
- 25-36 weeks
- 37-52 weeks
- 1 year



Source: Languages Canada & BONARD, 2022

Accommodation: Student numbers



Largest accommodation shortages during June, July and August – minimum of **1,701 beds**

Missing beds:

654
Homestay

572
Residence

55
Hotel/Hostel/ Guest house

420
Other

Source: Languages Canada & BONARD, 2023

An aerial, top-down view of a modern office space. The room features several round wooden tables arranged in a circular pattern, each surrounded by black chairs. People are seated at these tables, some working on laptops. The floor is a light-colored, polished material. In the foreground, a wooden walkway or staircase railing is visible, leading towards the center of the room. The overall atmosphere is professional and collaborative.

Q & A

Q1 2024

CANADA MARKET OVERVIEW



7,090

students



10%

less compared to
Q1 2023



65,097

student weeks



5%

less compared to
Q1 2023



9.2

avg. course duration (weeks)

In total, 25 Languages Canada members participated in Q1 2024.

Q1 2024: Top 10 source markets comparison

	CANADA	
Q1 2023	Q4 2023	Q1 2024
Japan	Brazil	Brazil =
Brazil	Japan	Japan =
South Korea	Mexico	South Korea ▲
Colombia	South Korea	Mexico ▼
Mexico	Colombia	Colombia =
China	France	Taiwan ▲
France	Turkey	China ▲
Taiwan	Taiwan	France ▲
Chile	China	Turkey ▼
Turkey	Chile	Vietnam ▲

Global performance: Top 3 source markets across destinations (Q1 2023 vs Q1 2024)

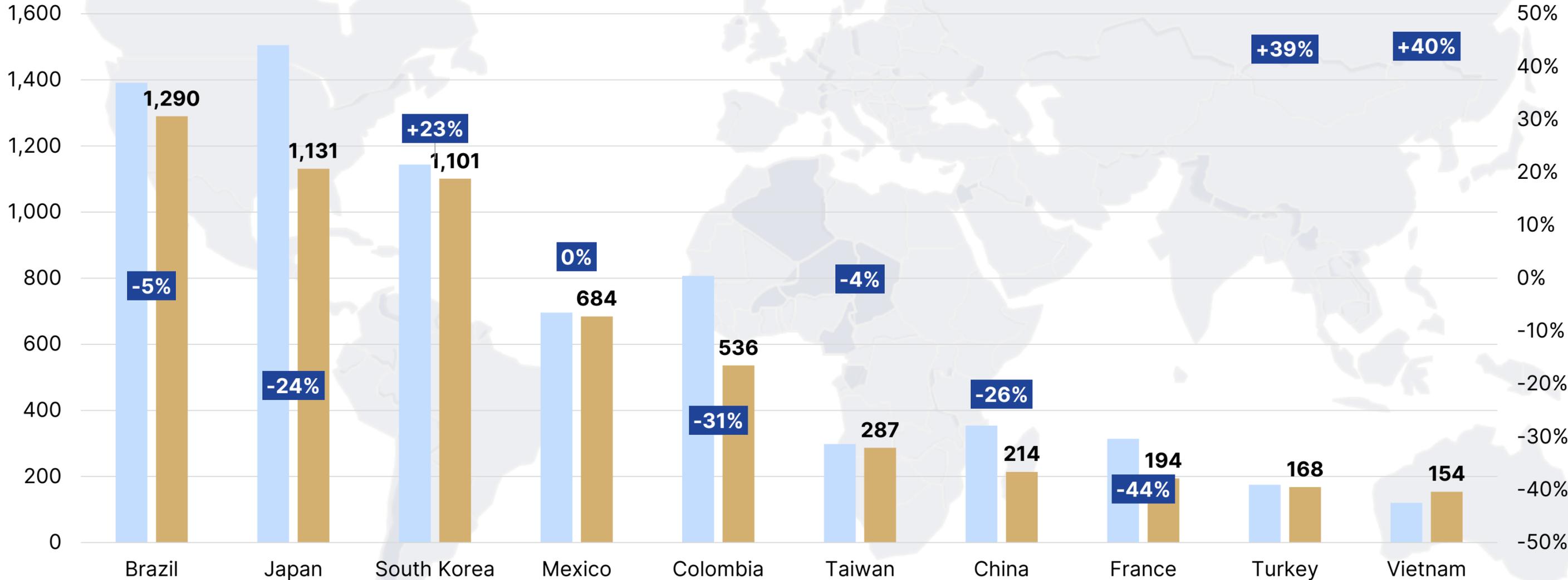


Canada Q1 2024: Source countries comparison

Share (%) of
10 source
markets

81%

Q1 2023 Q1 2024 Change



Source: Languages Canada & BONARD, 2024

Benchmarking tool

- A comprehensive tool for benchmarking is provided to assess the performance of your center and enable data-driven strategic decisions throughout the year. It allows market share calculation per source market, based on sector.
- Detailed insights into 90 Canadian source markets are offered by these tool. An interactive method for summarizing and analyzing student flows in detail, known as a pivot table, is provided to address questions about the data.



Pivot tables

Nationality	Sum of Q1 2024 Overall Student	Sum of Q1 2024 Your Student
	Numbers	Numbers
Brazil	1,290	0
Japan	1,131	0
South Korea	1,101	0
Mexico	684	0
Colombia	536	0
Taiwan	287	5
China	214	5
France	194	0
Turkey	168	5



Benchmarking and calculating market share

Your market share
0%
0%
0%
0%
0%
2%
2%
0%
3%

Top source markets in Q1 2024

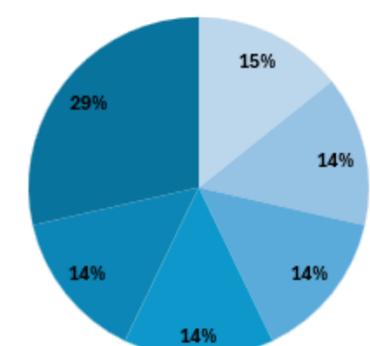
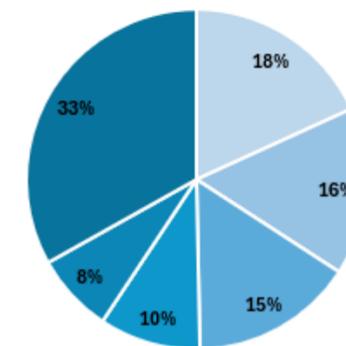
Source Market	Student numbers	Y-O-Y Change
Brazil	1,290	-5%
Japan	1,131	-24%
South Korea	1,101	23%
Mexico	684	0%
Colombia	536	-31%
Other	2,348	n/a

Top source markets for your centre in Q1 2024

Source Market	Student numbers
Congo	5
Tunisia	5
India	5
Bolivia	5
Taiwan	5
Other	10

■ Brazil ■ Japan ■ South Korea ■ Mexico ■ Colombia ■ Other

■ Congo ■ Tunisia ■ India ■ Bolivia ■ Taiwan ■ Other



Thank you!



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