



Languages Canada

2016 Annual Survey Report



Foreword

I recently gave a presentation on the convergence of technology, education and policy, and had the chance to reflect on the progress that the association had made over the last several years in positioning Canada's language education sector beyond our borders. While it is clear that growth will continue to manifest in what we term 'off-shore delivery' of language education, inbound students are essential to Canada's language education sector and to Canada as a country. International language students coming to Canada are often on their first step towards a post-secondary education, applying their skills to our workforce and some choosing Canada as their home. Their presence impacts our academic institutions, communities and local businesses, and makes a valuable contribution to Canada's long-term vibrancy and prosperity.

This report focuses on 2016 student numbers, but because Languages Canada has been tracking student data since its inception in 2008, we are able to provide long-term analysis that speaks to the health of our sector and membership.

If we compare 2016 to 2015 student numbers, we have reason to be cautiously optimistic. When comparing apples to apples (controlling data for fluctuation in Languages Canada membership) we see a year-over-year increase of 4% in student numbers. True, student weeks are down slightly, but increased growth in student numbers is again expected in 2017, impacted by the continued low Canadian dollar, visa policies both in Canada and within competitor countries, as well as the Trump and Brexit effects. Even if the current growth is not quite at the average global growth rate, it seems that at last we are moving in a more positive direction.

However, if we take a longer-term view and look at student numbers since 2012, the story changes. How could it be that we are still 5% below 2012 and 1.5% below 2014 numbers? Granted, these are absolute numbers and our membership has changed, but Languages Canada membership has increased since 2012, and should have resulted in an even greater number of students, especially when considering that Canada has actually crept up the rankings in student and agent desirability.

From where I sit, as Executive Director of Languages Canada, addressing the question of why numbers have dropped and have not kept pace with global growth is of prime importance. There are external factors, such as competition, of course, but ultimately our competitiveness is determined to a large extent on how we position ourselves as a country, and Canada still does not have a unified strategy and plan for international education, including language education. Languages Canada continues to advocate for a Canadian strategy that will highlight the excellence found in each province.

This year, 2017, our members have elected to proceed in a direction that continues to strengthen the founding pillars of the association: quality; ethics; and student protection. Our hope is that growth will manifest as a result of the strengthening of these three pillars.

I would like to thank our members for providing all the data necessary to compile this report and thereby support our strategic commitments. I am especially grateful to Felicity Borgal, *Officer, Research and Special Projects*, and to the Languages Canada team for creating this document. I hope that members, partners and readers find this document as informative as I have.

Sincerely,



Gonzalo Peralta
Executive Director

Table of Contents

Executive Summary	4
1. Methodology	7
2. Languages Canada Membership	8
2.1 Changes in Membership	9
2.2 Student Numbers: Public and Private Sector	10
3. Student Numbers	11
3.1 Overall Student Numbers and Student Weeks	12
3.2 Student Numbers: Public and Private Sector	14
3.3 Student Numbers by Province	15
3.4 Student Numbers by Province, adjusted for change in LC membership	17
3.5 Government-Funded Language Students	18
4. Student Demographics	19
4.1 Short-term Junior Students	20
4.2 Students Continuing to Post-Secondary Education	21
4.3 Visa Categories	23
4.4 Length of Stay	24
4.5 Country of Origin	25
4.5.1: Long-term Analysis: Top 10 Source Countries	27
5. Administration	30
5.1 Staff Numbers	31
5.2 Tuition and Accommodation Income	32
5.3 Bookings	33

Table of Contents

6. International Promotion and Marketing	34
6.1 Languages Canada Target Markets (2015–2016)	35
6.2 Markets of Interest for Future Promotional Activities	36
6.3 Amount Spent on Marketing Activities	38
7. Challenges Faced by Member Programs	39
7.1 Most Frequently Identified Challenges in 2016	40
7.2 Visa Refusals.....	41
8. Focus on French Programs	42
8.1 Student Numbers	43
8.1.1 Student Numbers by Province.....	44
8.2 Student Demographics.....	45
8.2.1 Visa Categories.....	45
8.2.2 Length of Stay.....	46
8.2.3 Country of Origin.....	47
8.3 Administration	50
8.3.1 Staff Numbers	50
8.3.2 Tuition and Accommodation Income	51
8.4 Challenges Faced by Member Programs	52
9. Economic Impact of Language Students in Canada	53
9.1 Economic Impact of Students	54
9.2 Impact of Students in Pathway Programs	56
9.3 Tax Revenue from Students.....	56
10. Putting Languages Canada’s Student Data into Context	57
10.1 International Student Market	58
10.2 International Students in Canada	58
10.3 Changes Facing the Language Travel Market	59
11. References	61

Executive Summary

The Languages Canada 2016 Annual Survey Report provides a comprehensive analysis of student numbers and demographics within Languages Canada member programs, and offers useful insights into the operations of Languages Canada members as well as the economic impact of language students on the Canadian economy. The survey was completed by 100% of Languages Canada members. As Languages Canada membership makes up at least 80% of overall English and French language education programs in Canada, the data presented in this survey is indicative of broader sector trends.

As of December 31, 2016, Languages Canada had 222 member programs, down slightly from 224 member programs in 2015. The number of full voting member institutions was 169 (some members operate more than one program, accounting for two separate memberships.) Of these member institutions, 107 were private and 62 were public. A 6:4 ratio of private to public members has remained relatively constant over the life of the association; however the last three years have seen a slight overall increase in private sector members and decrease in public sector members. The make up of Languages Canada membership has been impacted by provincial designation policies, implemented to comply with Canada's *International Student Program* in June 2014, which have primarily driven positive growth in private sector membership.

In 2016, 135,425 students enrolled in Languages Canada member programs, up about one percent from 133,910 students in 2015. However, when controlling for changes in Languages Canada membership, (i.e. comparing only data from members programs that remained constant from 2015 to 2016) the overall growth rate of student numbers was closer to four percent. This is more indicative of the growth rate of the overall Canadian language education sector.

2015 to 2016 growth in student numbers varied greatly from province to province. With data controlled for changes in Languages Canada membership, strong growth in student numbers was seen in British Columbia (7%), Manitoba (7%) and Ontario (8%), while decreases in student numbers were reported in Alberta (-17%), Nova Scotia (-5%) and Saskatchewan (-4%). Student numbers remained constant in Quebec.

The overall number of study weeks declined from 2015 to 2016. **In 2016, students studied an average of 11.1 weeks, versus 11.8 in 2015.** On average, students in public programs studied much longer than students in private sector programs (15.4 weeks versus 9.9 weeks, respectively). However, a decrease in average study weeks was reported by both private and public sector member programs.

Over half of students required some form of visa to enter the country in 2016, either with a study permit for education of over six months or a visitor's visa. However, **the proportion of study permit-holding students declined for the second year in a row, from 34% in 2014 to 28% in 2015, and the number of non-visa holding students increased over that same time.** Changes in visa requirements and processing for a number of countries, including Mexico and Brazil, have impacted the flow of short-term students, and the average reported study weeks.

Consistent with the decline in average study weeks, the number of reported **short-term junior students jumped to 12,632 in 2016, up from 10,540 in 2015.**

Students enrolled in French-language programs stayed for shorter periods of time and were more likely to be from Canada. The majority of students studying French attended programs in Quebec.

Executive Summary

The survey revealed that **45,174 students intended to continue on to post-secondary studies in 2016, representing approximately one third of all students attending Languages Canada programs.** This includes students in pathway programs (16,649); students studying English or French for academic purposes (14,172); and students studying general English or French with intent to enter into further studies (14,353).

The top five source countries for 2016 were: Japan (21,192), Brazil (20,747), China (15,391), South Korea (15,172) and Mexico (9,036). Japan, Brazil and China were the top three reported source countries for the fourth year in a row. Year-over-year growth from 2015 to 2016 was reported for students from Japan, Brazil, Mexico, Taiwan, Colombia and Turkey, with particularly noteworthy growth in student numbers from Mexico and Colombia.

The number of students from China decreased for the third consecutive year, and is now almost on par with South Korean student numbers, which have stagnated since 2012. Student numbers from Saudi Arabia continue to drop drastically, as a result of changes to the King Abdullah Scholarship Program, and declined from over 15,000 in 2012 to 5,990 in 2016.

French programs showed different patterns in student numbers, with the highest number of students originating from Canada (2,107), the United States (891), Brazil (427), Mexico (389) and China (316).

Languages Canada's 2016 international business development activities focused on six markets: Taiwan, Mexico, Colombia, Brazil, Italy and Eastern Europe. Target markets for business development activities in 2014 and 2015 were China, Vietnam, Mexico, Turkey, Spain and Kazakhstan. Student numbers from markets targeted by Languages Canada increased from 2015 to 2016, with the exception of China. **Looking ahead, Languages Canada members identified Mexico, China, Brazil, Vietnam and South Korea as the top five countries of interest for marketing and promotion purposes.**

Languages Canada members employed 4,550 teachers and 2,028 staff in 2016. The number of teachers increased slightly over 2015, consistent with a slight increase of student numbers.

Members identified their **competition from other accredited programs** as their biggest challenge, as well as **student visa denials** and **international competition** from language education programs abroad. Languages Canada members indicated that rates of visa refusal for students from Turkey, the Middle East, Africa, Venezuela and Vietnam are in excess of 10%.

Tuition and living expenses paid by language students in **2016 generated an estimated \$1.44 billion in export revenue for the Canadian economy and contributed \$165 million in federal and provincial tax revenue.** These figures do not take into account travel/tourism spending while in Canada or future revenues of students intending to pursue further post-secondary study.



1. Methodology



1. Methodology

The 2016 Languages Canada Annual Survey Questionnaire was sent out to all Languages Canada members in February 2017. All Languages Canada members are required to complete the survey as part of ongoing membership criteria. All member programs returned completed surveys.

Members were given the option to complete the survey in three formats: MS Word, PDF or online via Survey Monkey software, and could respond in either French or English.

The Annual Survey Questionnaire posed questions related to a number of key areas, including:

- Student numbers;
- Student demographics (country of origin, type of visa, students continuing to post-secondary programs, junior students, length of stay);
- Member operations (teacher and administrative staff numbers, tuition and accommodation income, marketing activities); and
- Challenges members faced during the year.

To ensure continuity, most questions from the 2015 survey remained identical, with the addition of more detailed instructions, (for example, more explicit instruction on how to calculate the number of students who only study for a few hours per week.) The 2016 survey also included some new questions not asked in previous surveys.



2. Languages Canada Membership



2. Languages Canada Membership

2.1 Changes in Membership

As of December 31, 2016, Languages Canada had 222 member programs, down from 224 in December of 2015. (See Table 2.1.) Of the 222 member programs, 63 were publicly funded, and 159 were private. 25 were French-language programs and 197 were English-language programs.

Table 2.1: Change in number of member programs, by province (2015–2016)

	Member programs Dec. 31, 2015	Member programs Dec. 31, 2016	Difference
ALBERTA	20	22	+2
BRITISH COLUMBIA	61	56	-5
MANITOBA	5	6	+1
SASKATCHEWAN	2	2	0
ONTARIO	86	89	+3
QUEBEC	37	33	-4
NEW BRUNSWICK	2	3	+1
PRINCE EDWARD ISLAND	1	1	0
NOVA SCOTIA	10	10	0
ALL OF CANADA	224	222	-2

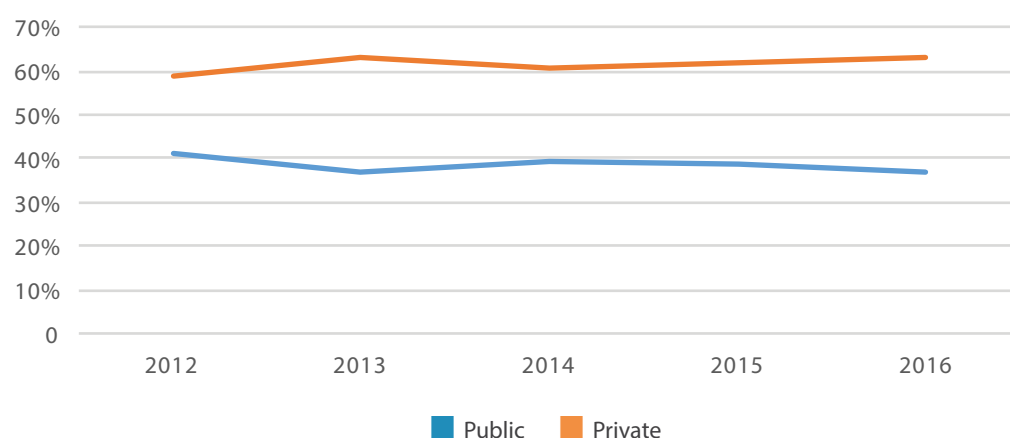
In a number of provinces (including Nova Scotia, Ontario, Manitoba and Alberta), Languages Canada membership is now either a requirement for private language programs to achieve Designated Learning Institution (DLI) status, or enables an easier designation process. DLI status is mandatory for any Canadian program to enrol study permit-holding international students. Nova Scotia and Alberta require all programs, whether public or private, to be members of Languages Canada for designation purposes. This has impacted the makeup of Languages Canada's membership, and, in turn, the proportion of public and private member programs.

2. Languages Canada Membership

2.1 Changes in Membership, *continued*

As of December 31, 2016, Languages Canada had 169 full voting members, some of which operated more than one accredited program (accounting for two or more separate memberships). Of these institutions, 107 were private sector, and 62 were public sector. (See Figure 2.1.) The percentage of voting members (public vs. private) has remained relatively stable over the past few years, despite changes in membership.

Figure 2.1: Percentage of voting members [public vs. private] (2012–2016)

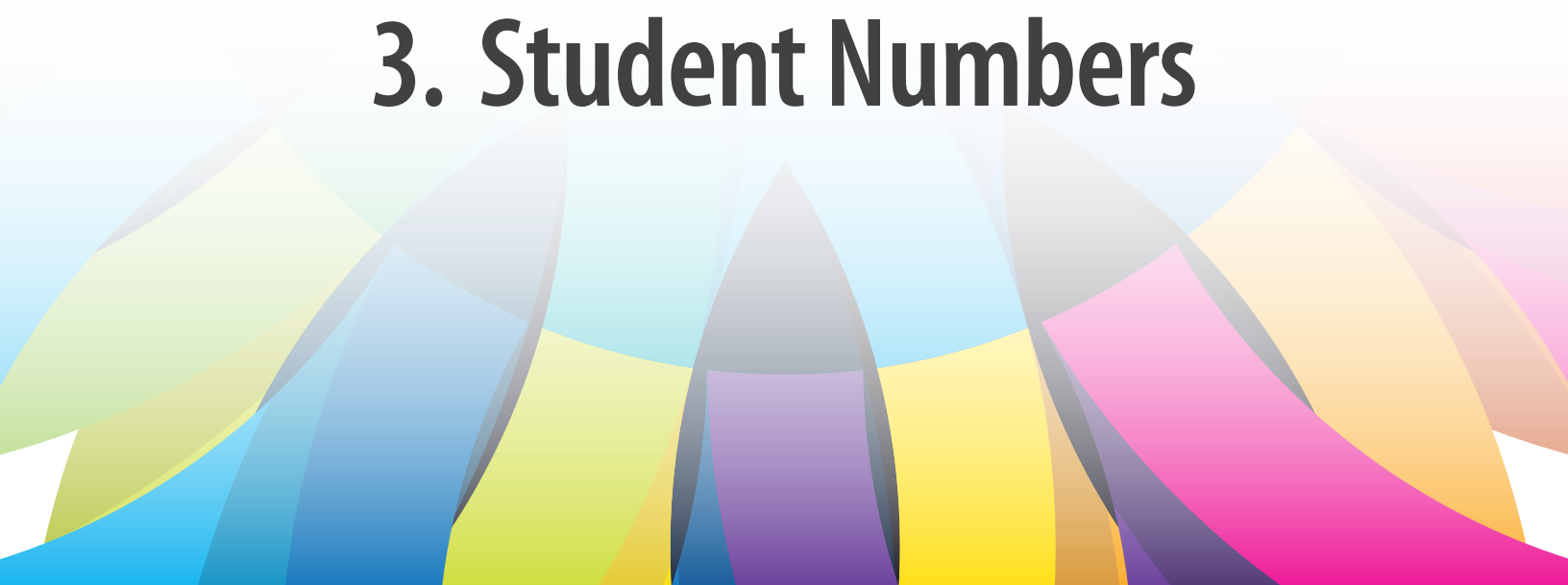


2.2 Sector Share of Languages Canada Member Programs

Given that a comprehensive list of language education providers in Canada does not exist, and the sector is unevenly regulated across provincial jurisdictions, it is difficult to state precisely how many language programs exist in Canada. However, it is estimated that at least 80% of international language students in Canada study at Languages Canada member programs.



3. Student Numbers



3. Student Numbers

3.1 Overall Student Numbers and Student Weeks

Note that student numbers presented in this section are representative of student enrolment in Languages Canada member programs only, not for the whole sector. As noted in the above section, Language Canada member programs account for at least 80% of language education students in Canada.

The number of students in Languages Canada member programs in 2016 increased by approximately 1% over 2015, from 133,910 to 135,425. However, student numbers have not recovered to 2012 levels of 142,931.

The average number of student weeks has decreased slightly, from 11.8 in 2015 to 11.1 in 2016. This suggests that students are coming to Canada for shorter periods of language study, although the percentage change is not large enough to confirm a definitive trend.

Table 3.1a: Student numbers (2015–2016)

	2015	2016
Total number of students in Languages Canada member programs	133,910	135,425
Total number of student weeks	1,577,149	1,501,083
Average number of weeks per student	11.8	11.1

Year-over-year fluctuations in reported student numbers are affected by changes in Languages Canada membership as well as international student flows. To provide a true picture of growth of student numbers, independent of changes in membership, a “like-to-like” analysis is needed that uses only programs which were Languages Canada members in both 2015 and 2016. When adjusted to control for change in Languages Canada membership, student enrolment grew by 4% from 2015 to 2016.

Table 3.1b: Student numbers, adjusted for change in LC membership (2015–2016)

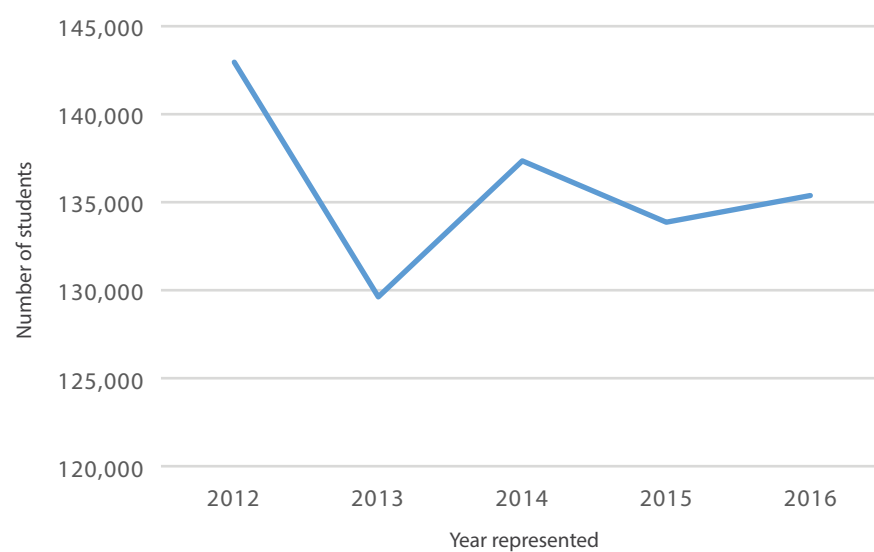
	Number of students, 2015	Number of students, 2016	Difference (number)	Difference (%)
Total	133,910	135,425	1,515	1%
Adjusted for change in LC membership	128,515	134,114	5,629	4%

3. Student Numbers

3.1 Overall Student Numbers and Student Weeks, *continued*

Figure 3.1 shows the long-term student number data from 2012 to 2016.

Figure 3.1: Student numbers: long-term analysis (2012–2016)



3. Student Numbers

3.2 Student Numbers: Public and Private Sector

For the second year in a row, most of the increase in student numbers was reported within private sector member programs, and a decline in student numbers was reported within public sector programs. (See Table 3.2a.) This is partly attributed to the respective fluctuation in Languages Canada membership within the public and private sector,¹ as described in Section 2.

Table 3.2a: Student numbers private vs. public sector members (2015–2016)

	Number of students, 2015	Number of students, 2016	Difference (number)	Difference (%)
Public sector	30,515	29,598	-917	-3%
Private sector	103,395	105,827	2,432	2%
TOTAL	133,910	135,425	1,515	1%

On average, students in Languages Canada public member programs study 6.5 weeks longer than students at private sector programs. (See Table 3.2b.). This is consistent with the fact that students generally attend public sector programs in preparation for post-secondary study, whereas private sector programs cater to both long- and short-term students.

Table 3.2b: Number of study weeks: public vs. private sector members (2015–2016)

	Study weeks, 2015	Study weeks, 2016	Average weeks per student (2015)	Average weeks per student (2016)
Public sector	513,998	455,167	16.8	15.4
Private sector	1,063,151	1,045,916	10.3	9.9
TOTAL	1,577,149	1,501,083	11.8	11.1

¹ Three public sector programs are no longer in the association between 2015 and 2016. There was a difference of 5 private sector members during this time too (five are no longer in the association, one joined). This makes a difference of 4% fewer public sector members compared with 2.5% private sector member programs. Further, the impact on student numbers of a given member leaving the association will change depending on the size of that member. In this case, the decrease in public sector programs had more impact on student numbers than the decrease in private sector members.

3. Student Numbers

3.3 Student Numbers by Province

Total student numbers by province/region are broken down in Table 3.3a below, including: number of students; student weeks; average weeks per student; total students to post-secondary and short-term junior students. Students attending Languages Canada programs in Nova Scotia and Alberta study the highest number of weeks, on average (15.5 and 14.8 respectively), and students in Manitoba study the lowest, on average (9.6 weeks.)

Table 3.3a: Number of students by province (2016)

	Students	Weeks	Average weeks per student	Total students to post-secondary	Short-term junior students
Alberta	9,078	134,500	14.8	5,241	300
British Columbia	48,632	509,390	10.5	11,192	3,807
Manitoba	1,605	15,361	9.6	865	0
Saskatchewan	1,147	14,787	12.9	810	0
Ontario	58,431	651,094	11.1	20,561	7,036
Quebec	12,468	122,798	9.8	4,485	1,424
Atlantic	4,064	53,153	13.1	2,020	65
ALL OF CANADA	135,425	1,501,083	11.1	45,174	12,632
Nova Scotia (also included in Atlantic)	2,902	44,904	15.5	1,896	42

Comparing 2016 to 2015 survey data, the largest changes in student numbers took place in Alberta, Manitoba and Ontario (See Table 3.3b). The continued increase of students in this province is mostly within the private sector. Manitoba's net increase was relatively small (1,605, up from 1,494), but represents an impressive seven percent rate of growth of student numbers. In Alberta, the decline was seen mostly within public sector programs.

The 2016 survey data also identified a continued decrease in student numbers in the provinces of Nova Scotia and BC, both of which reported a decline in student numbers for the fourth consecutive year.

3. Student Numbers

3.3 Student Numbers by Province, *continued*

The decrease seen in Nova Scotia is in large part due to a decline in students from countries that have traditionally sent a large number of fully-funded scholarship students to Canada, primarily Libya and Saudi Arabia.² In 2013, at the peak of the Libyan-North American Scholarship Program and King Abdullah Scholarship Program, students from Libya and Saudi Arabia totalled 116 and 892 students, respectively. As of 2016, these numbers have declined to 14 and 258, respectively.

Table 3.3b: Year-over-year student numbers by region (2015–2016)

	Number of students, 2015	Number of students, 2016	Difference (number)	Difference (%)
Alberta	10,305	9,078	-1,227	-12%
British Columbia	49,440	48,632	-808	-2%
Manitoba	1,494	1,605	111	7%
Saskatchewan	1,190	1,147	-43	-4%
Ontario	54,503	58,431	3,928	7%
Quebec	13,000	12,468	-532	-4%
Atlantic	3,978	4,064	86	2%
ALL OF CANADA	133,910	135,425	1,623	1%
Nova Scotia (also included in Atlantic)	2,963	2,902	-61	-2%

² The Libyan-North American Scholarship Program (LNASP) experienced several disruptions affecting scholarship payments during 2015 and 2016, and the King Abdullah Scholarship Program (KASP) changed in focus and scope in 2016 (ICEF Monitor, 2016).

3. Student Numbers

3.4 Student Numbers by Province, adjusted for change in LC membership

As noted in section 3.1, fluctuations in reported student numbers are affected by changes in Languages Canada membership as well as international student flows. A breakdown of student numbers by province, adjusted for change in Languages Canada membership, is presented in Table 3.4 below.

Table 3.4: Year over year student numbers, adjusted for change in LC membership (2015–2016)

	Number of students, 2015	Number of students, 2016	Difference (number)	Difference (%)
Alberta	10,305	8,544	-1,761	-17%
British Columbia	45,303	48,532	3,229	7%
Manitoba	1,494	1,605	111	7%
Saskatchewan	1,190	1,147	-43	-4%
Ontario	54,268	58,431	4,163	8%
Quebec	11,977	11,921	-56	0%
Atlantic	3,978	3,964	-14	0%
ALL OF CANADA	128,515	134,114	5,629	4%
Nova Scotia (also included in Atlantic)	2,963	2,802	-161	-5%

With the data adjusted for changes in Languages Canada membership, it becomes evident that the decrease in student numbers in British Columbia and Quebec has been primarily due to a decrease in Languages Canada membership. In contrast, when adjusted to control for change in membership, the 2016 decrease in student numbers in Alberta was a striking 17%.

3. Student Numbers

3.5 Government-Funded Language Students

Languages Canada's members offer tailored language education programs to new Canadians, including publicly-funded courses for settlement, such as the Language Instruction for Newcomers to Canada³ (LINC) program. Settlement programs at Languages Canada members hosted approximately 20,000 students in 2016. (Note: these students are not included in overall student numbers presented in this report.)

Additionally, 14 programs offer courses for public servants and business, which also fall outside of the scope of this survey.

SPOTLIGHT: The Languages Canada Syrian Refugee Integration Initiative

In 2015, the Government of Canada sponsored the resettlement of 25,000 Syrian refugees in Canada. The sudden influx of refugees – over and above the regular yearly quota – led to an overwhelming outpouring of support from Canadians. It was quickly realized that the existing refugee settlement services, including government-funded language programs, was overwhelmed by the increased demand for these services. Languages Canada members responded with the *Languages Canada Syrian Refugee Integration Initiative*, through which members donated places in language programs to newly arrived Syrian refugees. To date, at least 150 Syrian refugees have benefitted from the initiative, studying English and French in member programs across the country.

³ For more information on LINC programs, please see: <http://www.cic.gc.ca/english/department/media/backgrounders/2013/2013-10-18.asp>



4. Student Demographics

4. Student Demographics

4.1 Short-term Junior Students

The number of short-term junior students jumped to 12,632 in 2016, up from 10,540 in 2015. This increase comes after two years of decline, from a high of 12,995 in 2013.

Of the 12,632 short-term junior students in Languages Canada member programs, Ontario and British Columbia accepted the most, with 7,036 and 3,807 students, respectively.

The 2015 Annual Survey reported that enrolment was being affected by stricter Canadian visitor visa policies from some markets (e.g. Mexico), compared to international competitors, such as the UK and Australia. As of December 1st, 2016 the visitor visa requirement for Mexicans visiting Canada has been lifted (Government of Canada, 2016), and visa requirements for visitors from Brazil, Bulgaria and Romania have recently been relaxed (Immigration, Refugees and Citizenship Canada, 2017). These changes in visa policies have likely had an impact on the increase in short-term junior students. The trend is expected to increase in 2017.

Table 4.1: Number of short-term junior students by province (2016)

	Students	Short-term junior students
Alberta	9,078	300
British Columbia	48,632	3,807
Manitoba	1,605	0
Saskatchewan	1,147	0
Ontario	58,431	7,036
Quebec	12,468	1,424
Atlantic	4,064	65
ALL OF CANADA	135,425	12,632
Nova Scotia (also included in Atlantic)	2,902	42

4. Student Demographics

4.2 Students Continuing to Post-Secondary Education

Many students decide to study English or French in Canada in order to meet the language proficiency requirements of a post-secondary program within a Canadian university or college. Students may enter language pathway programs that allow for transition directly into pre-selected post-secondary studies. Other students choose to study English or French for academic purposes or enrol in general language courses with the intent to continue to post-secondary education at a later point. These three academic paths are distinct, but all refer to students who are improving their language abilities in pursuit of further education.

Languages Canada estimates that approximately one third of students studying in member programs intend to pursue further education following completion of their language program. (See Table 4.2a.) Note: The numbers provided are estimates, as not all programs are able to provide exact figures on students' intentions to pursue further study.

The number of students in these programs has declined by nearly 4,000 students since 2015, concentrated in students in pathway programs and English/French for academic purposes pathways. The number of students reported in general English/French with intent to further studies increased, suggesting that students are choosing shorter term studies rather than official pathways into further education. Table 4.2b provides a breakdown of students to post-secondary study by province.

Table 4.2a: Students to further post-secondary education (2015–2016)

Type of Program	Number of students, 2015	Number of students, 2016
Pathway programs	19,480	16,649
English/French for academic purposes	20,428	14,172
General English/French with intent to further studies	9,286	14,353
TOTAL	49,194	45,174

4. Student Demographics

4.2 Students Continuing to Post-Secondary Education, *continued*

Table 4.2b: Number of students to post-secondary, by province (2016)

	Students	Total students to post-secondary
Alberta	9,078	5,241
British Columbia	48,632	11,192
Manitoba	1,605	865
Saskatchewan	1,147	810
Ontario	58,431	20,561
Quebec	12,468	4,485
Atlantic	4,064	2,020
ALL OF CANADA	135,425	45,174
Nova Scotia (also included in Atlantic)	2,902	1,896

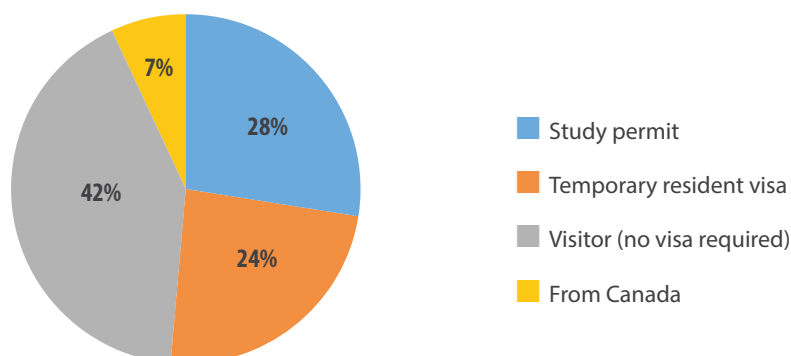
4. Student Demographics

4.3 Visa Categories

The 2016 survey asked Languages Canada member programs to specify student enrolment numbers entering their programs in four categories:

1. Those on study permits (needed for periods of study of six months or more);
2. Those on temporary resident visas (any temporary visa other than study permits);
3. Those who do not need a visa for short-term entry (visitor); and
4. Those from Canada.

Figure 4.3: Proportion of students in Languages Canada member programs by visa category (2016)



The proportion of reported students on study permits (28%) has decreased for the second year in a row, compared with 34% of students in 2014. The real number of students on study permits has also declined.

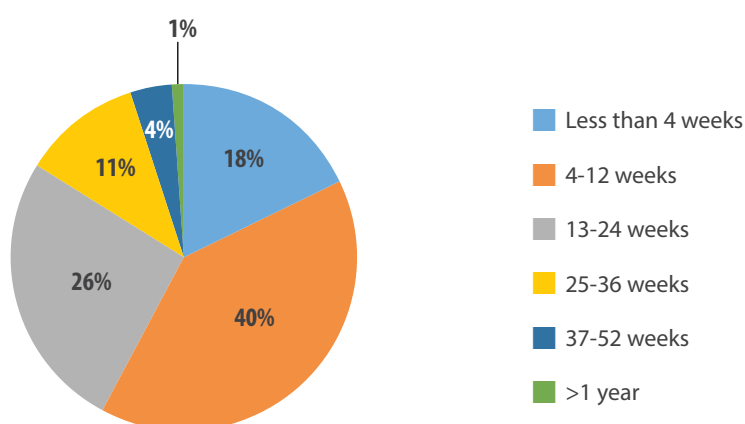
The biggest increase has been in students classified as “visitor (no visa required)”. With the softening of Canadian visa requirements for a number of countries including Mexico and Brazil, it seems likely that both the number and the proportion of students in this category will continue to increase in coming years.

4. Student Demographics

4.4 Length of Stay

As in previous years, the survey asked members to provide the length of stay of students. The compiled responses are shown proportionately in Figure 4.4.

Figure 4.4: Proportion of students in Languages Canada member programs by length of study (2016)



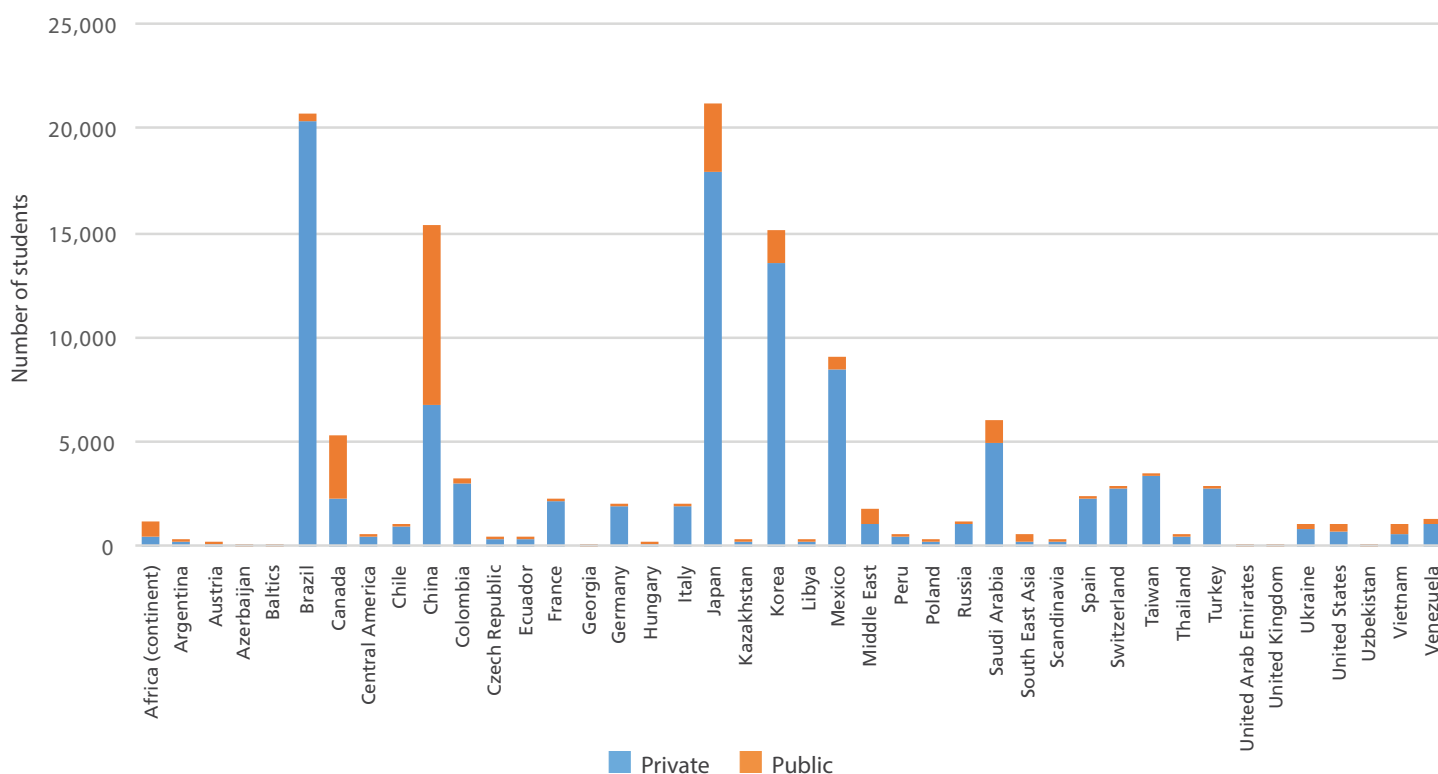
Compared to 2015 data, proportionately fewer students were reported in the 4-12 week range in 2016 (40% compared to 46% in 2015), and proportionately more students were reported in the 13-24 week and 25-36 week range (26% compared to 23% and 11% compared to 8%, respectively).

4. Student Demographics

4.5 Country of Origin

Figure 4.5 presents the number of students reported by country of origin, and the breakdown of enrolment in public and private sector programs. The majority of students from nearly all source countries attended private sector programs in 2016. The obvious exception to this trend is China, where more students attended public sector programs.⁴

Figure 4.5: Number of students by country of origin (2016)



Members were asked to identify “other” student source countries not included in the survey’s list. Of note, Panama and India received repeated mention in this section - non-traditional source countries for Canadian language program students.

⁴ Students from China have consistently shown a preference for public sector programs over private programs. One reason for this may be a “white list” of recognized institutions provided by the Chinese Ministry of Education, and which only contains Public sector programs. Languages Canada also understands that some students are concerned that their education will not be recognized upon their return to China if they do choose a private program.

4. Student Demographics

4.5 Country of Origin, *continued*

SPOTLIGHT:

Average Length of Stay by Country of Origin

Survey data suggests that students from some source countries tend to study for longer periods of time than others. Based on data reported from 135 Languages Canada member programs, language students from Africa, Central Asia and Vietnam study an average of 15 to 22 weeks, while students from Europe and the USA study an average of one month or less.

Longest average stay	Shortest average stay
Vietnam – 22.1 weeks	Italy – 4.7 weeks
Libya – 20.9 weeks	Scandinavia – 4.5 weeks
Georgia – 17.9 weeks	Germany – 4.0 weeks
Uzbekistan – 15.1 weeks	USA – 3.8 weeks
Africa (Continent) – 14.7 weeks	Austria – 3.7 weeks

4. Student Demographics

4.5 Country of Origin, *continued*

4.5.1: Long-term Analysis: Top 10 Source Countries

The Annual Survey has collected data on students' country of origin for the last five years, from which trends have been identified in student numbers from the top 10 source countries. (See Table 4.5.1.) Figure 4.5.1a shows this data graphically. The countries are listed in descending order based on 2016 student numbers.

Table 4.5.1: Number of students from top 10 source countries and Canada (2012–2016)

	2012	2013	2014	2015	2016
Japan	18,793	17,990	20,081	19,618	21,192
Brazil	18,395	17,656	20,128	19,865	20,747
China	14,809	14,426	17,685	17,093	15,391
South Korea	16,942	14,100	15,571	15,761	15,172
Mexico	6,371	6,091	7,623	7,970	9,036
Saudi Arabia	15,578	11,162	10,497	9,080	5,990
Canada	9,066	7,449	7,758	6,894	5,303
Taiwan	2,985	3,155	3,392	3,066	3,553
Colombia	2,338	2,093	2,337	2,805	3,316
Turkey	1,447	1,393	1,389	1,948	2,902
Switzerland	3,185	3,003	3,002	2,515	2,802

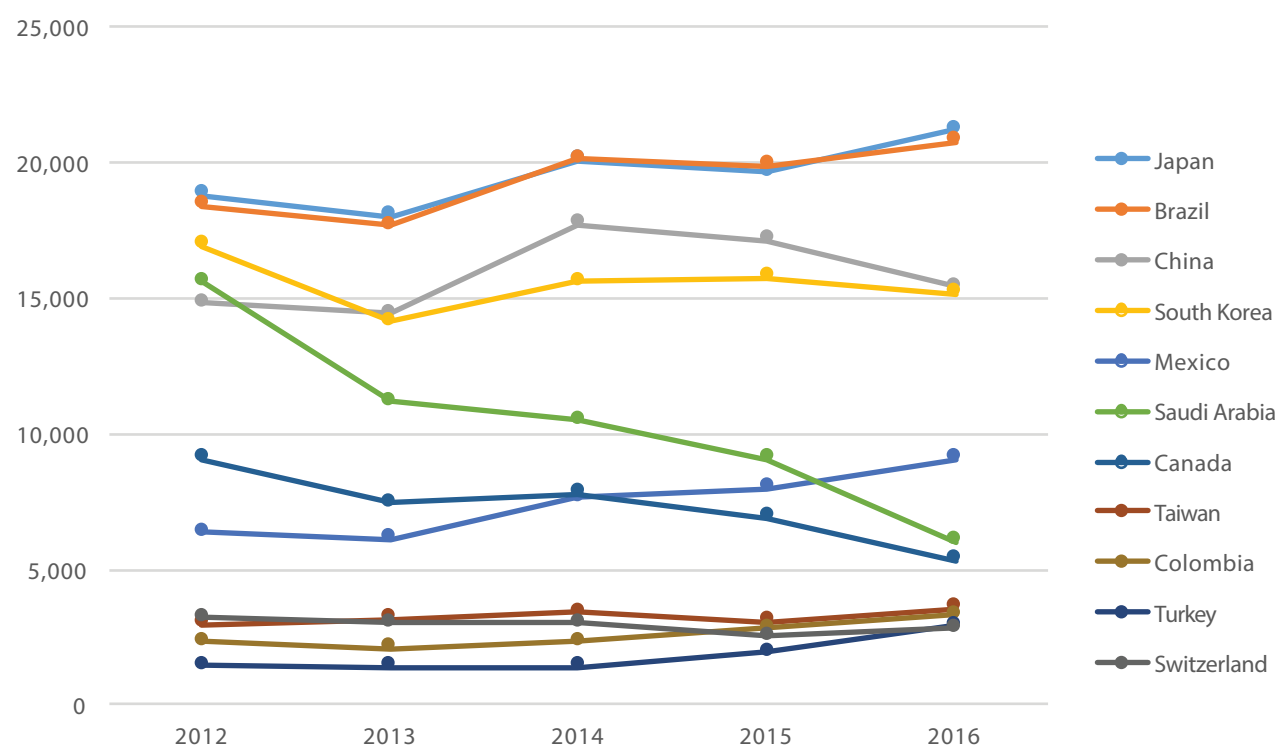
NB: Numbers in italics were not a top 10 source country for that year.

4. Student Demographics

4.5 Country of Origin, *continued*

4.5.1: Long-term Analysis: Top 10 Source Countries, *continued*

Figure 4.5.1a: Number of students from top 10 source countries (2012–2016)



Top 10 source countries remained consistent from 2015 to 2016, with the exception of Turkey replacing Spain as the ninth source country on the list. (Note: the number of students from Spain did increase slightly, but not enough to stay in the top 10.)

For the fourth consecutive year, Japan, Brazil and China were the top source countries for students in Languages Canada member programs in 2016. Year-over-year growth from 2015 to 2016 was reported for students from Japan, Brazil, Mexico, Taiwan, Colombia and Turkey.

Student numbers from China, South Korea and Canada have been in decline since 2014.

Of particular note is the continued decline of student numbers from Saudi Arabia, which are now half of the numbers reported in 2014, and one third of numbers reported in 2012. Further declines are expected, as changes to the King Abdullah Scholarship Program have reduced the number of government-funded Saudi students to Canada, especially in language programs (ICEF Monitor, 2016).

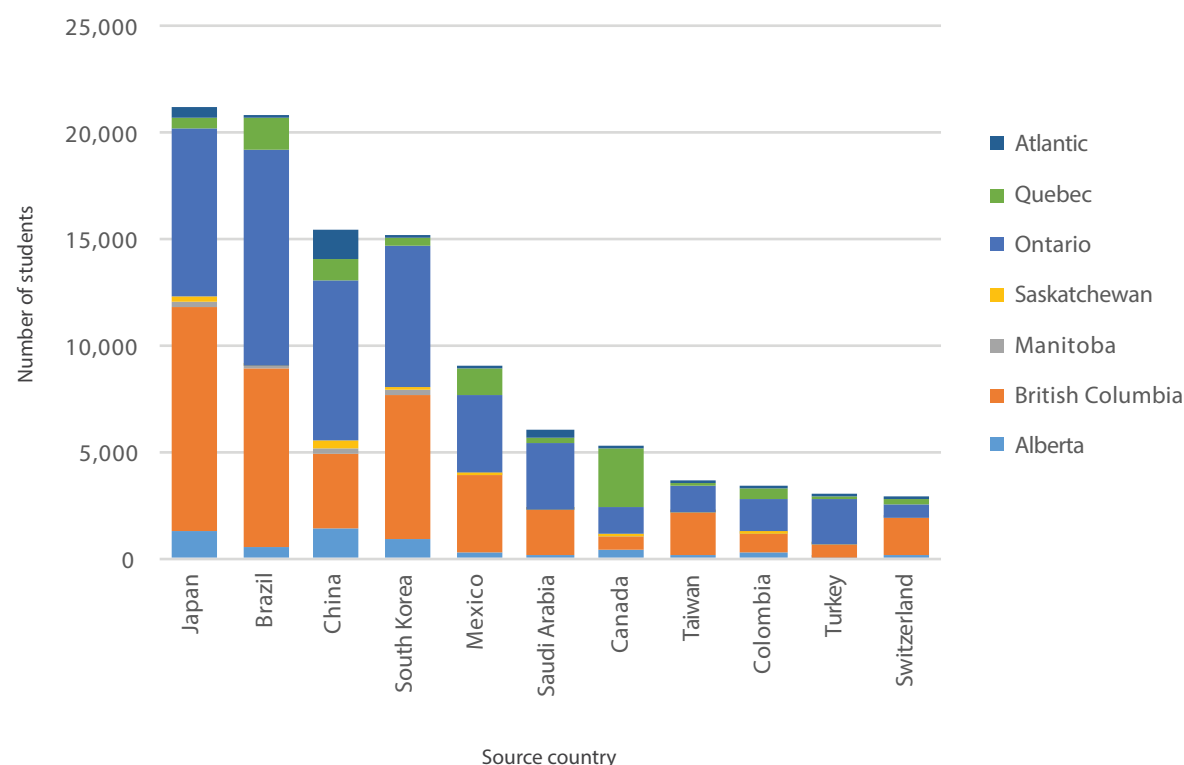
4. Student Demographics

4.5 Country of Origin, *continued*

4.5.1: Long-term Analysis: Top 10 Source Countries, *continued*

Figure 4.5.1b presents student source country data by province. Japanese students are more likely to choose to study in BC than other provinces, whereas students from Brazil, China and Saudi Arabia are more likely to select Ontario.

Figure 4.5.1b: Number of students by province from top 10 source countries (2016)





5. Administration

5. Administration

5.1 Staff Numbers

Table 5.1a and 5.1b present the total reported number of Languages Canada members' teaching and administrative employees in full-time, part-time and seasonal positions in 2016. The number of teachers increased slightly over 2015 in almost every category, which is consistent with a slight increase of student numbers. The majority of the increase was reported in private sector programs, representative of the relative increase in private sector membership and student numbers.

Table 5.1a: Number of teachers employed by Languages Canada member programs (2016)

Number of teachers	Total	Private sector	Public sector
Full-time	1,994	1,425	569
Part-time	1,434	842	592
Seasonal	1,122	745	377
Total	4,550	3,012	1,538

Table 5.1b: Number of administrators employed by Languages Canada member programs (2016)

Number of teachers	Total	Private sector	Public sector
Full-time	1,324	1,051	273
Part-time	255	153	102
Seasonal	449	352	97
Total	2,028	1,556	472

5. Administration

5.2 Tuition and Accommodation Income

Compared to 2015, average 2016 tuition increased by approximately \$3/week and average accommodation cost increased by \$5/week. (See Table 5.2.)

Table 5.2: Tuition and accommodation income (2016)

	Amount
Average weekly tuition	\$339.79
Average weekly income from accommodation fees (not all institutions earn income from accommodation)	\$242.70

Reported tuition costs vary from program to program and depend on a number of factors, such as location, duration, intensity, and the age and type of student (international vs. Canadian). Generally speaking, junior students at language camps pay the most per week as their tuition and accommodation fees include all activities, room and board.

Accommodation fees depend on the city and the type of accommodation chosen (homestay, on-campus housing, off-campus rentals, etc).

Note: Not all member programs receive income from accommodation placements, so the weekly accommodation figure above is based on data from the 146 member programs that do.

5. Administration

5.3 Bookings

The survey asked Languages Canada members two questions regarding student bookings. The first pertained to booking type: the percentage of students making bookings individually, as a group or through other means. The second looked at booking source: the percentage of bookings made via educational agencies, online presence, institutional agreements, government scholarships or other sources.

Table 5.3a shows the breakdown of booking types. Private sector members are slightly more likely to have students attend programs as part of a group, while public sector programs are more likely to receive students individually. This is consistent with the fact that public sector programs are more likely to focus on language education for individuals seeking entry into further post-secondary education programs and, in general, make less use of educational agencies.

Table 5.3a: Booking types (2016)

	Group	Individual	Other
Private sector	83%	13%	4%
Public sector	75%	21%	4%

Table 5.3b shows the breakdown of booking sources. The results for booking sources are consistent with previous years, with private sector programs receiving students through agents at approximately double the rate of public sector programs. Public sector programs are much more likely to receive students through institutional agreements as well as students who are recipients of government scholarships.

Table 5.3b: Booking sources (2016)

	Agents/agencies	Online/direct contact	Institutional agreements	Government scholarships	Other
Private sector	64%	29%	2%	3%	2%
Public sector	34%	37.5%	15.5%	11%	2%



6. International Promotion and Marketing

6. International Promotion and Marketing

6.1 Languages Canada Target Markets (2015–2016)

Languages Canada's 2016 international business development activities focused on six markets: Taiwan, Mexico, Colombia, Brazil, Italy and Eastern Europe. Business development activities in these markets included: The 2nd Canada-Brazil Language, Education and Workforce Forum in São Paulo, Brazil (March 2016); a trade workshop in Taipei, Taiwan (April 2016); a trade mission to Bogotá, Colombia (November 2016); and a trade mission to Milan, Italy (January 2017). The student numbers from these markets will be looked at closely over the next few years.

Target markets for business development activities in 2014 and 2015 were China, Vietnam, Mexico, Turkey, Spain and Kazakhstan.

Student numbers from markets targeted by Languages Canada increased from 2015 to 2016, with the exception of China. (See Table 6.1 below.)

Table 6.1: Change in student numbers in Languages Canada target markets (2012–2016)

	2012	2013	2014	2015	2016	Percentage change (2015-2016)
China	14,809	14,426	17,685	17,093	15,391	-10%
Mexico	6,371	6,091	7,623	7,970	9,036	13%
Turkey	1,447	1,393	1,389	1,948	2,902	49%
Spain	3,813	2,519	2,536	2,176	2,381	9%
Vietnam	908	746	1,054	809	1,049	30%
Kazakhstan	323	185	268	182	281	54%

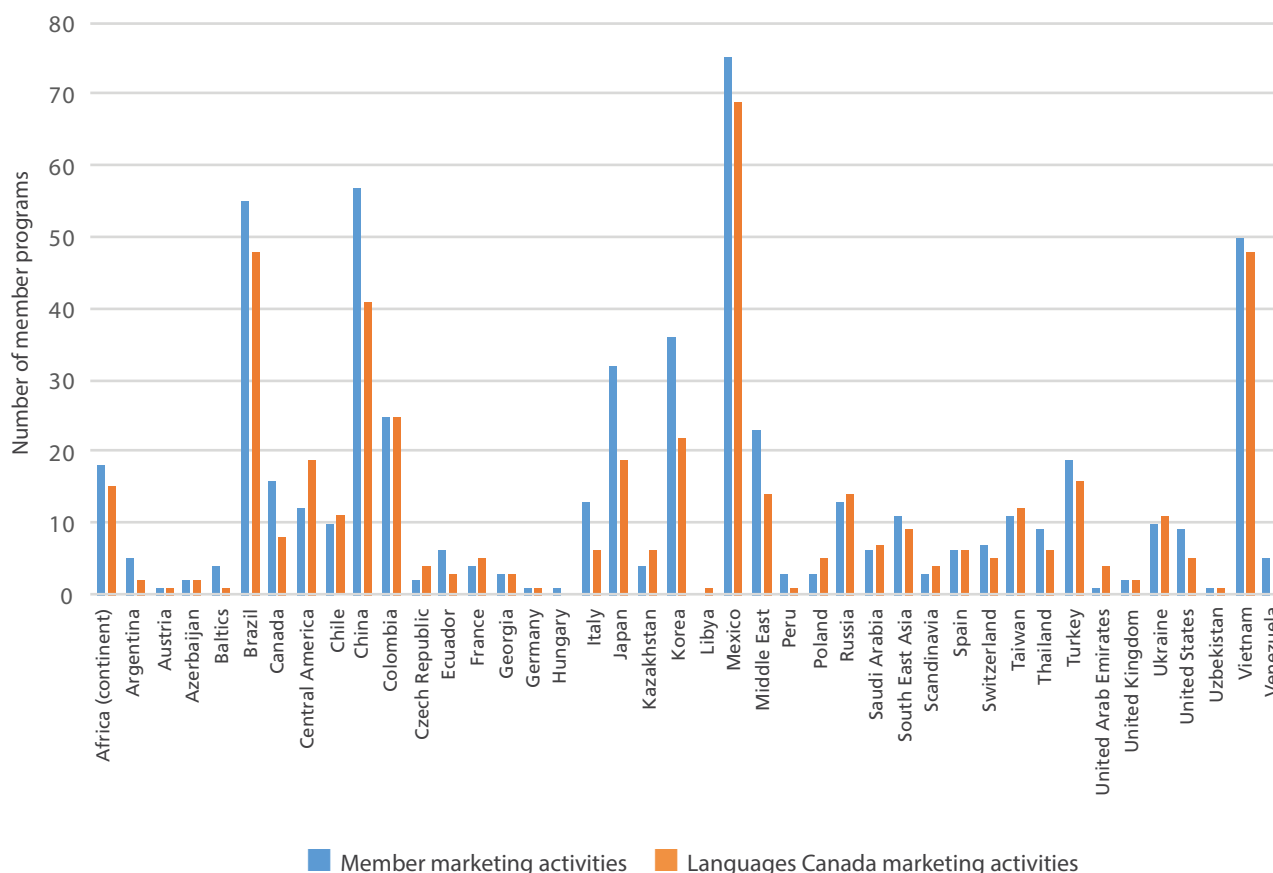
6. International Promotion and Marketing

6.2 Markets of Interest for Future Promotional Activities

The survey asked members to identify up to three markets in which their programs plan to focus marketing activities, and where they believed Languages Canada should focus business development activities as an association. The results are displayed in Figure 6.2.

Mexico was the most frequently identified market for both member and association business development activities, followed by China, Brazil and Vietnam.

Figure 6.2: Top markets of interest for future promotional activities



6. International Promotion and Marketing

6.2 Markets of Interest for Future Promotional Activities, *continued*

Information from the Annual Survey informs Languages Canada's international business development activities. Based on 2015 survey results, as well as direct consultation with members and guidance from its International Affairs Committee, Languages Canada will conduct trade missions to Mexico in September 2017, and to Kazakhstan in February 2018. Note that agents from Georgia, Turkey, and Uzbekistan will also participate in the Kazakhstan mission. Additionally, Languages Canada will conduct an exploratory staff mission to Morocco in autumn 2017 to gauge the market's potential.

SPOTLIGHT: Trade Missions

Languages Canada has been conducting trade missions since 2011, connecting member programs with growing markets for language education. In the 2016/17 season, trade missions were conducted to Colombia (November 2016) and Italy (January 2017).

A total of 24 member programs participated in the two trade missions, meeting with agents from Colombia, Panama, Venezuela, Ecuador, Italy, Slovakia, Poland, Ukraine, and Switzerland. Participating members also benefitted from face-to-face meetings with Canadian mission staff in the countries visited, including trade commissioners and visa officers, who provided valuable market intelligence and contacts, as well as opportunities to meet with institutions and government representatives in the countries visited.

Trade missions are not just about student recruitment, however. The trade missions allow members to glimpse into the cultures and societies of their international students, helping them to better relate to incoming students and their needs. In some cases, trade missions have placed Languages Canada in the center of history; for example the timing of the 2015 mission to Colombia coincided with the signing of the country's peace agreement!

6. International Promotion and Marketing

6.3 Amount Spent on Marketing Activities

The survey asked Languages Canada members for the total amount spent on marketing activities in 2016. This question was interpreted differently by different members. Some members included marketing staff salaries and mission travel costs, while others only included direct recruitment and printing costs (e.g. marketing materials). Furthermore, many programs were unable to provide an estimated figure, either because their marketing activities are centralized (so the budget is not available), or because they are so integrated in the overall program budget as to be inseparable.

Based on the information available, it is estimated that, on average, Languages Canada members spend approximately \$200 on program marketing activities for each student recruited.



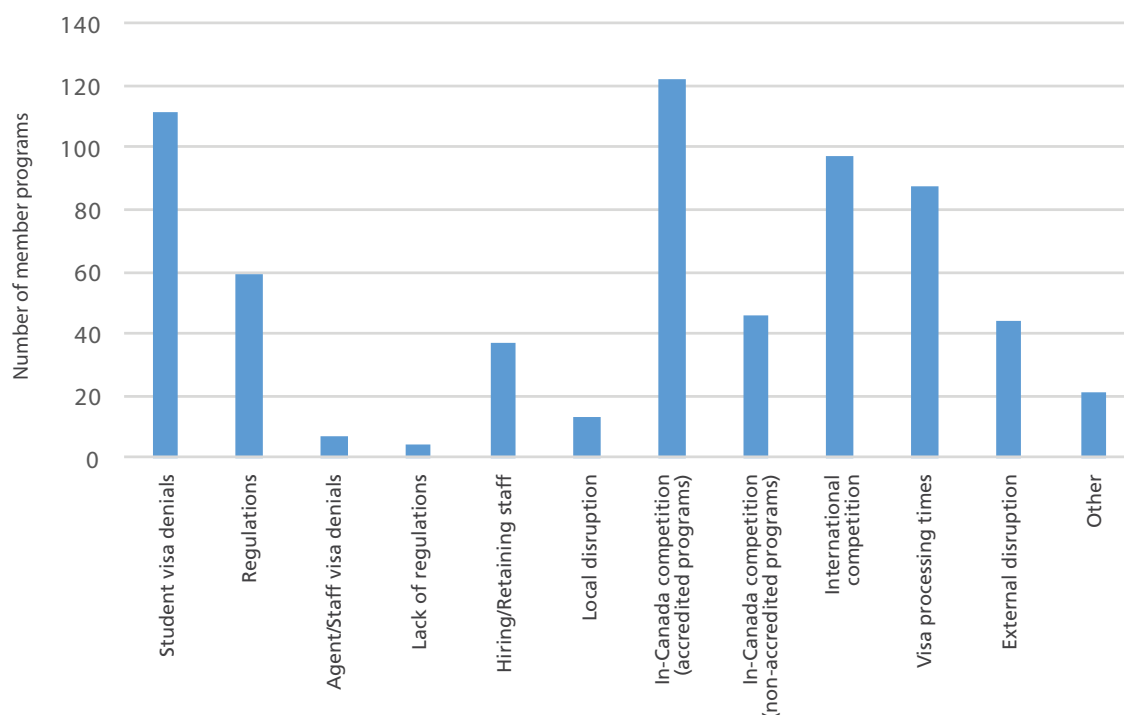
7. Challenges Faced by Member Programs

7. Challenges Faced by Member Programs

7.1 Most frequently identified challenges in 2016

Languages Canada member programs were asked to identify challenges faced during 2016. Members were able to select as many of the responses as applicable. Figure 7.1 shows the aggregated responses to this question. Note that this graph shows the number of programs affected by each negative factor, and not the relative severity of the disruption caused by each challenge.

Figure 7.1: Challenges faced by member programs (2016)



There was a slight change in this question from the previous year: “In-Canada competition” was differentiated into accredited programs and non-accredited programs. (i.e. member and non-member programs.) This differentiation was meant to better pinpoint members’ concerns regarding in-Canada competition. “Competition from other accredited programs” was identified as a challenge by nearly three times more members than “competition from non-accredited programs.” In other words, other members of Languages Canada are seen as greater competition.

Members were also given the opportunity to provide an open-ended response to identify “other” challenges. These responses include: designation requirements in some provinces which do not align with the international profile of programs; inability to expand as an institution; overly high agent commissions; and continued ambiguity on designation in some provinces.

7. Challenges Faced by Member Programs

7.2 Visa Refusals

“Student visa refusals” was the second most frequently cited challenge facing Languages Canada members. Languages Canada programs are impacted by the visa policies that apply to the international students who wish to study English or French in Canada.

Survey data suggested that students from some countries face higher rates of visa refusal than others. Table 7.2 shows the 10 countries with the highest number of reported visa refusals in 2016, and the percentage of potential students from each market this represents.

Note: Reporting on visa refusals by Languages Canada members is not obligatory, and only 91 member programs provided a response to this question. In the case of some countries, such as Venezuela, higher rates of visa refusal can be attributed to an historically elevated number of fraudulent visa applications. One reason for visa refusal which raises concerns among Languages Canada members is “purpose of visit”, questioning the legitimacy of studying French or English in Canada. “Purpose of visit” refusals have been a consistent challenge for the language education sector over the past several years, even for members whose programs are designated to receive students on study permits by their province.

Table 7.2: Number and percentage of reported visa refusals (2016)

Source country	Number of visa refusals	Number of students at Languages Canada programs	Percentage refused (reported)
China	405	15,391	3%
Turkey	382	2,902	12%
Colombia	246	3,316	7%
Saudi Arabia	226	5,990	4%
Middle East	196	1,756	10%
Brazil	194	20,747	1%
Mexico	129	9,036	1%
Africa (continent)	184	1,213	13%
Venezuela	141	1,294	10%
Vietnam	141	1,049	12%



8. Focus on French Programs



8. Focus on French Programs

This section presents a subset analysis of survey results for the 25 French Languages Canada member programs. French language programs traditionally have different student source markets (with many students coming from English Canada and the United States, for example), and are affected by different market forces than English programs. It is thus worthwhile to examine data from French programs separately.

Note: Some members offering both English and French programs were unable to separate the data for students by language of study. In these cases, 30% of the total number of students and student weeks at the institution were estimated to be in the French program. This is consistent with the proportion of students in French programs within those bilingual members who were able to separate this data.

8.1 Student Numbers

Students studying in French language programs account for approximately 6% of overall student numbers in Languages Canada programs. (See Table 8.1 below.)

In general, French member programs host students for a shorter period of time, with students staying 2.3 weeks under the Languages Canada overall average. This is indicative of the fact that Canadian students make up 25% of the overall student population in French language courses, the majority of which study in summer and school break programs of shorter duration.

Table 8.1: Student numbers French language programs (2016)

	Total	French Programs
Total number of students in LC member programs	135,425	8,152
Total number of student weeks	1,501,083	71,935
Average number of weeks per student	11.1	8.8

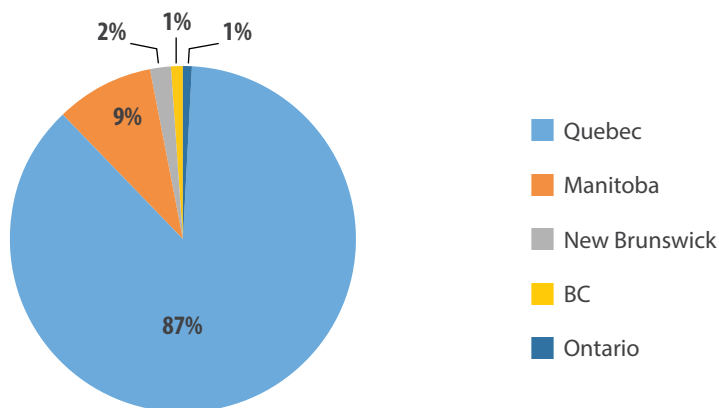
8. Focus on French Programs

8.1 Student Numbers, *continued*

8.1.1 Student Numbers by Province

Students studying French in Canada are predominantly concentrated within Quebec (87%), but programs in Manitoba, New Brunswick, BC and Ontario also welcome French language students.

Figure 8.1.1: Proportion of students in French language programs, by province of study (2016)

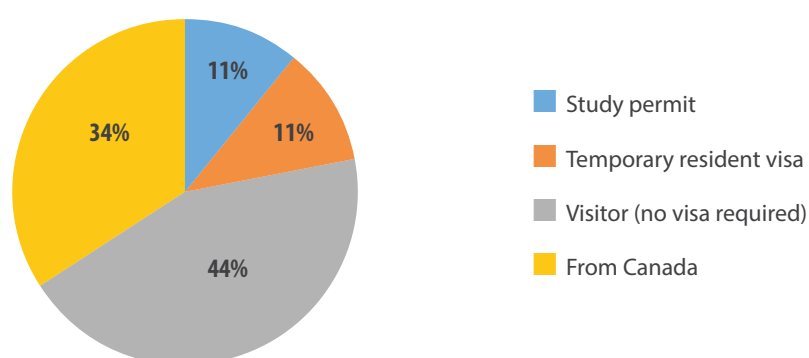


8. Focus on French Programs

8.2 Student Demographics

8.2.1 Visa Categories

Figure 8.2.1: Proportion of students in French language programs, by visa category (2016)



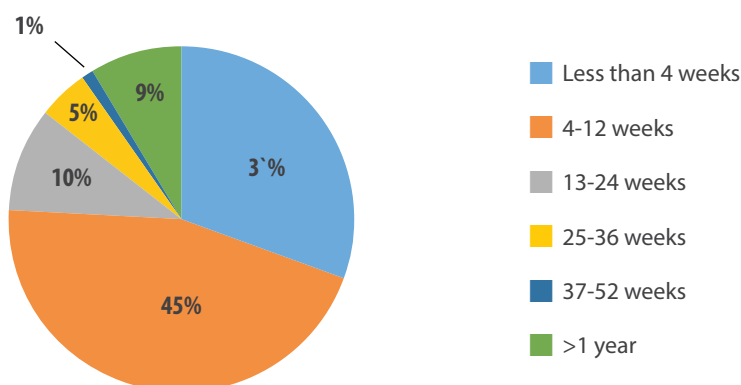
French programs have historically drawn large numbers of students from Canada compared to Languages Canada members as a whole. However, the reported proportion of students in French programs holding a study permit has dropped substantially, from 21% of students in 2015 to 11% of students in 2016. Each French member that reported study permit students in 2015 reported a lower number of study permit students in 2016. It should be noted that Quebec is the only province that does not recognize language schools in its educational framework and has not yet complied fully with its commitment to provide a framework for language schools to obtain a Designated Learning Institution (DLI) number.

8. Focus on French Programs

8.2 Student Demographics, *continued*

8.2.2 Length of Stay

Figure 8.2.2: Proportion of students in French language programs, by length of study (2016)



French language students predominantly study for fewer than 12 weeks, with about one quarter studying for longer than 12 weeks. The proportion of students studying for one year or more has increased from less than one percent in 2015 to 9% of students in 2016, in large part due to a new member program which offers an integrated language and further study option that is typically longer than one year in duration, accounting for over 500 students in this category.

8. Focus on French Programs

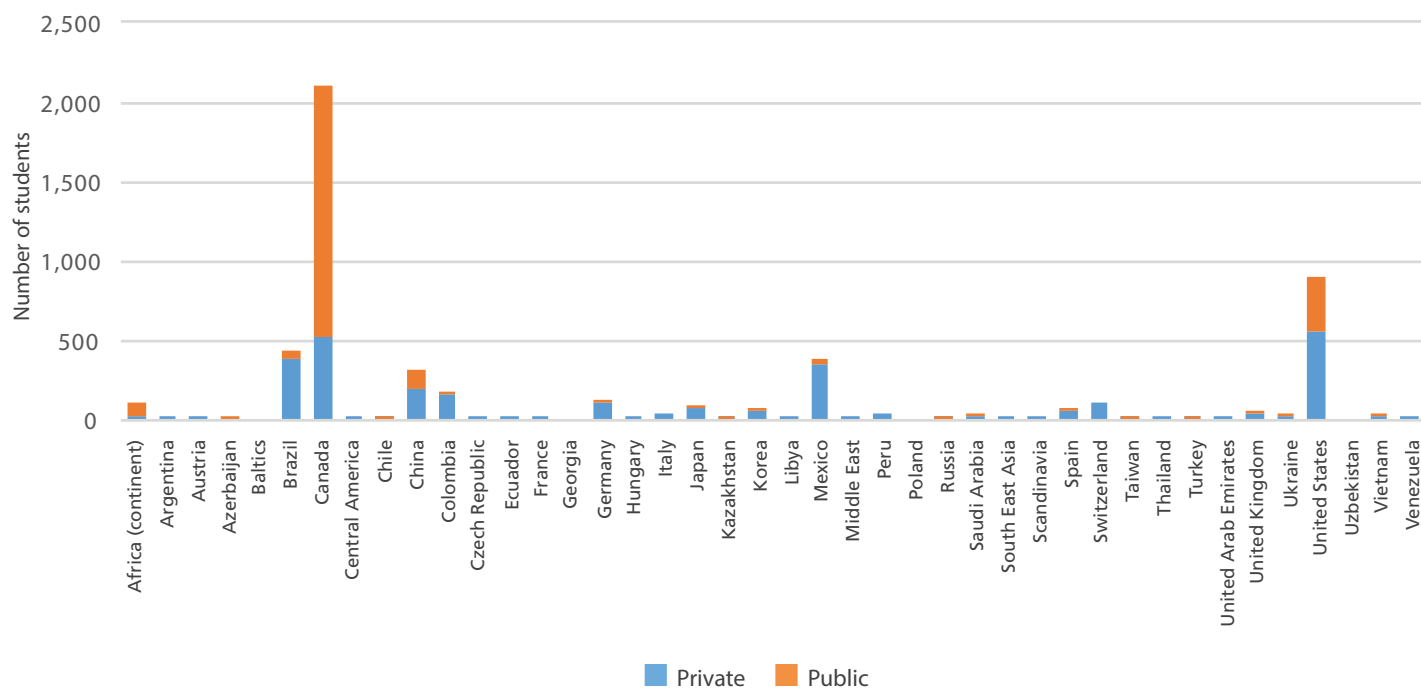
8.2 Student Demographics, *continued*

8.2.3 Country of Origin

Canada is the largest student source country for French language programs, with nearly one third of all reported students coming from Canada. (See Figure 8.2.3) Over 40% of Canadian students choose to study at public sector programs (benefiting from programs such as Explore⁵), whereas nearly every other source country predominantly sends students to private sector programs.

Other source countries identified by French language members, but not included in Figure 8.2.3, include Australia, New Zealand, Dominican Republic, and India.

Figure 8.2.3: Country of origin: students in French language programs (2016)



⁵ More information on Explore can be found at www.myexplore.ca

8. Focus on French Programs

8.2 Student Demographics, *continued*

8.2.3 Country of Origin, *continued*

8.2.3.1 Top 10 Source Countries

Table 8.2.3.1 below shows the top 10 source countries (including Canada) for Languages Canada French programs from 2012 to 2016, listed in descending order according to the number of students in 2016.

Table 8.2.3.1: Number of students in French language programs from top 10 source countries (2012–2016)

	2012	2013	2014	2015	2016
Canada	3,194	2,959	2,712	2,743	2,107
United States	520	590	766	814	891
Brazil	712	576	677	756	427
Mexico	460	447	585	598	389
China	366	207	303	471	316
Colombia	212	224	174	239	173
Germany	168	128	117	148	108
Switzerland	126	138	116	200	98
Japan	80	70	100	135	78
Korea	70	99	78	114	65
Spain	142	85	127	58	65

NB: Numbers in italics were not a top 10 source country for that year.

Overall, the number of students in French language programs declined from 2015 to 2016, although there was an increase in the number of students from the United States.

Spain has returned to the top 10 markets after dropping off in both 2013 and 2015. Korea has entered the top 10 for the first time.

8. Focus on French Programs

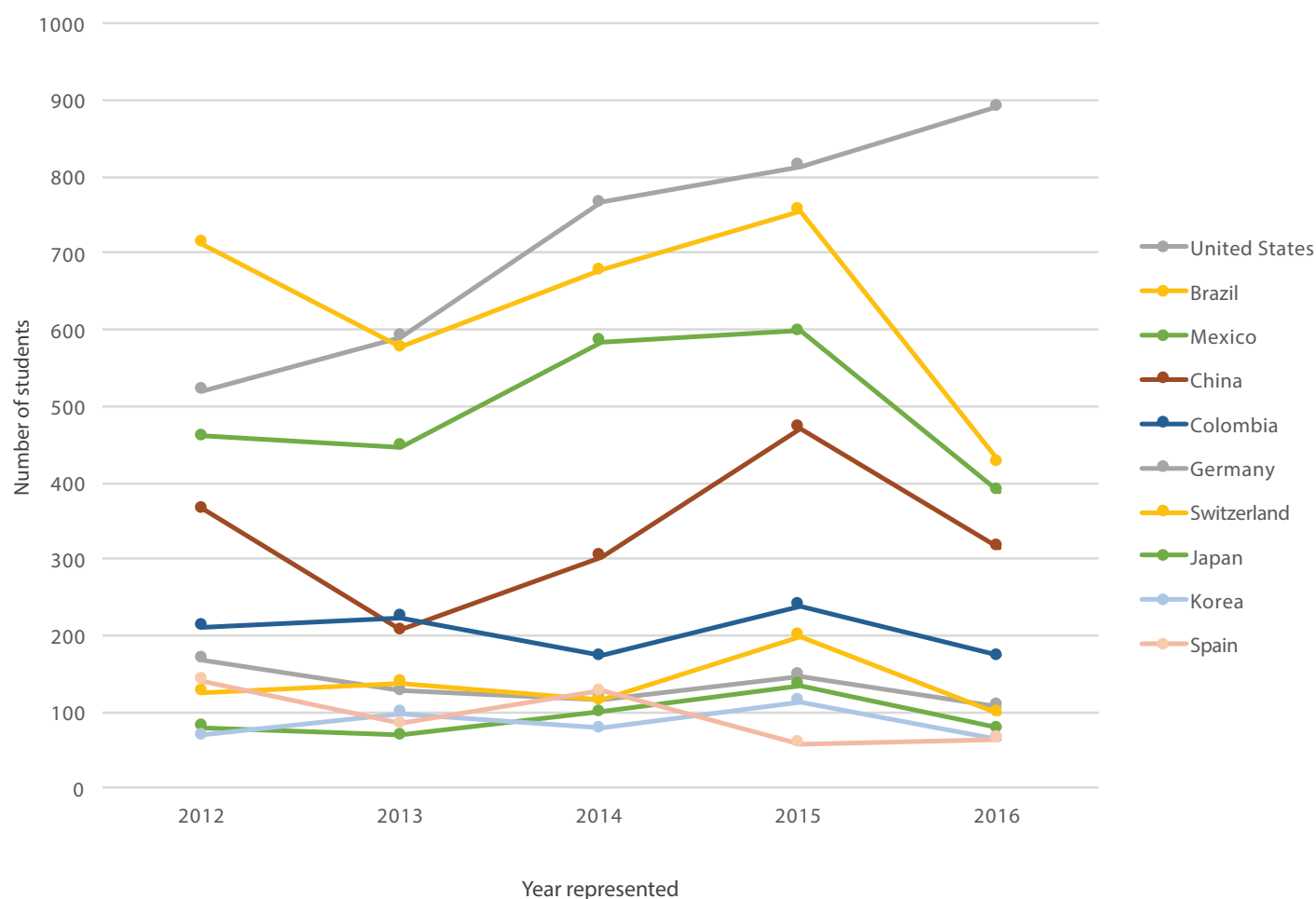
8.2 Student Demographics, *continued*

8.2.3 Country of Origin, *continued*

8.2.3.1 Top 10 Source Countries, *continued*

Figure 8.2.3.1 maps international student numbers in French language programs, with Canada removed to ensure trends in the smaller markets are more visible.

Figure 8.2.3.1: Top 10 international source countries for French language programs (2012–2016)



8. Focus on French Programs

8.3 Administration

8.3.1 Staff Numbers

Tables 8.3.1a and 8.3.1b, below, provide a breakdown of teaching and administrative staff employed at French language programs, compared to the overall Languages Canada membership.

Compared to Languages Canada programs overall, French programs reported a higher proportion of seasonal teachers (29% compared to 24%) and administrators (44% compared to 22%), due in part to the higher proportion of short-term and seasonal courses offered by French programs.

Table 8.3.1a: Number of teachers employed by Languages Canada French member programs (2016)

Number of teachers	Total	French Programs
Full-time	1,994	55
Part-time	1,434	185
Seasonal	1,122	102
Total	4,550	342

Table 8.3.1b: Number of administrators employed by Languages Canada French member programs (2016)

Number of administrators	Total	French Programs
Full-time	1,324	71
Part-time	255	27
Seasonal	449	76
Total	2,028	174

8. Focus on French Programs

8.3 Administration, *continued*

8.3.2 Tuition and Accommodation Income

The average 2016 tuition and accommodation income for French programs both decreased compared to 2015. For the first time, French language programs reported lower weekly tuition and accommodation costs than the Canadian average.

Table 8.3.2: Tuition and accommodation income in Languages Canada French member programs (2016)

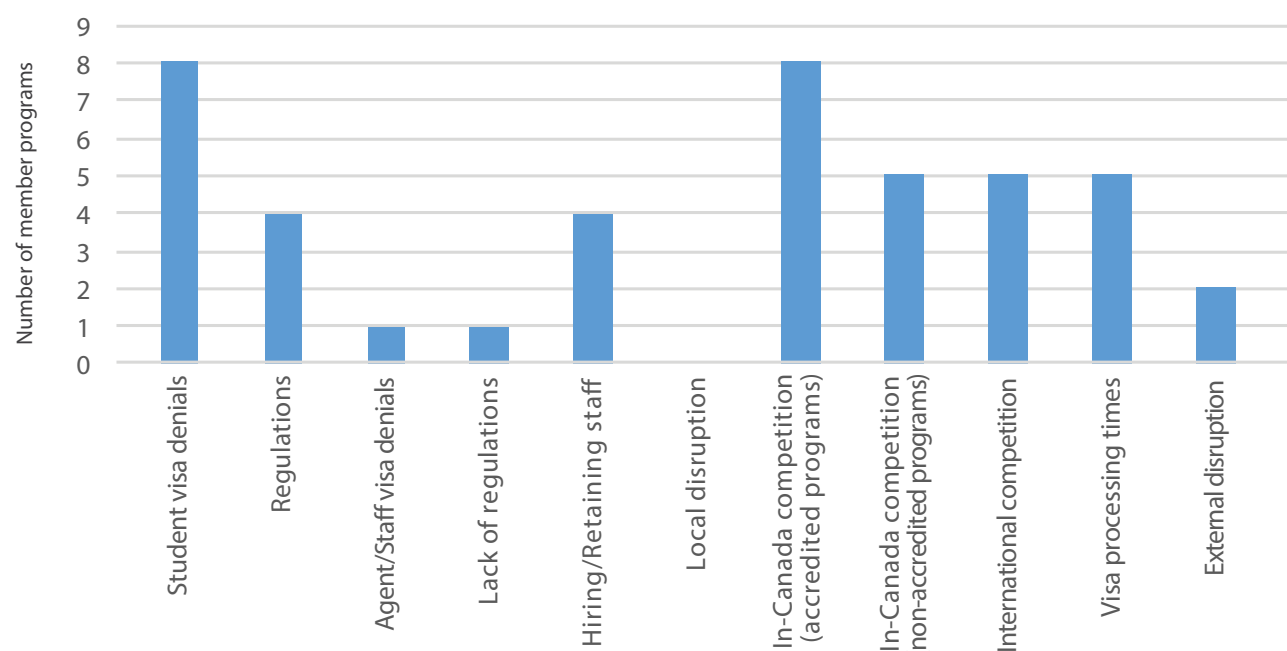
	All programs	French Programs
Average weekly tuition	\$339.79	\$333.03
Average weekly income from accommodation fees (not all institutions earn income from accommodation)	\$242.70	\$225.75

8. Focus on French Programs

8.4 Challenges Faced by Member Programs

As in previous years, the difficulties faced by French programs mirror those reported by member programs overall. In-Canada competition from other accredited programs and student visa denials were the most frequently reported challenges faced by French language members in 2016.

Figure 8.4: Challenges faced by French language member programs (2016)





9. Economic Impact of Language Students in Canada

9. Economic Impact of Language Students in Canada

9.1 Economic Impact of Students

In tuition income alone, students at Languages Canada member programs contributed approximately \$510,000,000 to the Canadian economy in 2016. When taking into account school fees and supplies as well as living expenses, including accommodation, travel and transportation, food, and other expenditures, students contributed approximately \$1.44 billion to the economy in 2016. The economic impact is based on an estimated weekly spending of \$960, broken down in Table 9.1 below.

Table 9.1: Estimated minimum spend by language students per week (2016)

Tuition	\$ 340
Accommodation (rent or homestay payment)	\$ 240
Food (groceries, restaurants, meal plans)	\$ 100
Tourism and miscellaneous expenses	\$ 120
Transportation	\$ 40
Entertainment	\$ 70
Bills (electricity, insurance, phone/internet, etc.)	\$ 50
TOTAL	\$ 960

Note: This is the estimated minimum weekly expense for students while enrolled in a language program. It does not include the following:

- Travel outside of study time (during holidays, between terms, or following a period of study);
- Parents, family and friends visiting students during their studies;
- Students who purchase cars while in Canada;
- Tax revenues to government from teachers, administrators and auxiliary staff employed by member programs; and
- Tax revenues to government from tourism and hospitality service sectors, homestay placements, and apartment and classroom rentals.

9. Economic Impact of Language Students in Canada

9.1 Economic Impact of Students, *continued*

SPOTLIGHT:

Economic Impact of the International Education Sector in Canada

In fall 2016, Dr. Roslyn Kunin and associates released a comprehensive report on the economic impact of the international education sector in Canada. This report found that international education contributed \$11.372 billion to the Canadian economy in export revenues in 2014, more than wheat or lumber, and nearly equal to motor vehicle parts (Roslyn Kunin and Associates, 2016).

The Roslyn Kunin and Associates' analysis was based on 438,157 international students, 307,706 of which are long-term students on study permits. The Government of Canada's International Education Strategy aims to increase the number of study-permit holding international students to 450,000 by 2022. (Government of Canada, 2014)⁶. Is international education on track to become the largest export sector in Canada?

⁶ The International Education Strategy can be found here: <http://international.gc.ca/global-markets-marches-mondiaux/education/index.aspx?lang=eng>

9. Economic Impact of Language Students in Canada

9.2 Impact of Students in Pathway Programs

As mentioned in section 3.2, 45,174 students were described by member programs as intending to pursue post-secondary studies in conjunction with, or following completion of their language education program.

Although not all of these students will necessarily continue to post-secondary study in Canada, those who do will continue to contribute export revenues to the Canadian economy over multi-year programs of study. As a conservative estimate, assuming just the 16,649 students enrolled in pathway programs enter university or college programs at the average undergraduate university tuition for international students (\$23,589 in 2016/2017; Statistics Canada, 2016), these students would contribute an additional \$392,000,000 in tuition fees alone per year in export revenue, before accommodation and other costs are taken into account.

9.3 Tax Revenue from Students

Based on an average tax rate of 13%⁷, in 2016 students enrolled in Languages Canada member programs contributed approximately \$165,000,000 to the Canadian government in HST, provincial and federal taxes. Approximately \$62,000,000 went to the federal government, while the remaining \$103,000,000 was collected by provincial governments.

⁷ Note: although the actual average tax rate across the 10 Canadian provinces is 12.3%, this is due in large part to Alberta, whose low tax rate brings down the overall average. Alberta represents a relatively small percentage of students in LC member programs, and as such the average tax rate used for this calculation was revised upwards.



10. Putting Languages Canada's Student Data into Context

10. Putting Languages Canada's Student Data into Context

10.1 International Student Market

"Roughly five million students are studying outside their home countries today, more than double the 2.1 million who did so in 2000 and more than triple the number of mobile students in 1990" (ICEF Monitor, 2017). It is estimated that Canada welcomed approximately 8% (400,000) of these students in 2016, behind the United States, United Kingdom, Australia and China.

At the same time, the overall market landscape is changing. Traditional sending countries are reaching plateaus, or, as in the case of China, are becoming top study destinations themselves, while an increasing number of students from traditionally smaller markets (Kazakhstan, for example⁸) are studying abroad. Traditional destination countries, conversely, are losing market share (if not numbers), and are encouraging more international experiences amongst their own students. For example, the percentage of international students choosing to study in the United States has dropped from 28% in 2001 to 22% in 2016 (ICEF Monitor, 2017).

10.2 International Students in Canada

The 2015 Annual Survey report, published in June 2016, referenced several studies that had been published on international education during the preceding year. These included a Statistics Canada report that counted 134,586 international students studying in public sector institutions in 2012 (Statistics Canada, 2016), and a report from the Canadian Bureau for International Education which placed the number of international students in Canada at 336,397 in 2014 (CBIE, 2015).

Both of these estimates use a relatively narrow definition of international students: that is, individuals who hold a valid study permit. This excludes a large portion of students in the language education sector, as well as any sector that provides instruction to students for under 6 months (and therefore do not require a study permit).

Dr. Roslyn Kunin's study used a more comprehensive approach to counting international students, including students on study permits as well as those in short-term programs at Languages Canada member institutions, and presented a total of 438,157 international students in 2014 (Roslyn Kunin and Associates, 2016). This is a more accurate estimate, but the study still misses short-term students studying at non-accredited language programs, which are not tracked through any known source. According to Dr. Kunin's report, students in Languages Canada member programs account for approximately 30% of the total number of international students in Canada (130,000 in 2014, including study-permit holders, and excluding Canadians).

8 Student mobility in Kazakhstan has increased 140% since 2016, ICEF Monitor (2017).

10. Putting Languages Canada's Student Data into Context

10.3 Changes Facing the Language Travel Market

International language education is a sector that is notoriously influenced by international forces. Changes to national scholarship programs can have a huge impact on international student flows, clearly seen in the examples of Saudi Arabia (King Abdullah Scholarship)⁹ Brazil (Science without Borders)¹⁰, and Mexico (Proyecta 10,000).¹¹

Similarly, national policy decisions within destination countries can influence where international students choose to study. Students looking to work during their language studies, for example, will more likely choose to study in Australia or New Zealand, where work and study is facilitated. They will not choose to study in Canada, where off-campus work during language study is effectively prohibited.

Recent political shifts have also had seismic effects on the sector, the full results of which will not be seen for some time. For example, in May 2016, the Brexit vote caused shockwaves through traditional sending markets to the United Kingdom, with EU applications falling by 9% between 2015 and 2016 (UCAS, 2016). The November 2016 US election has shaken the confidence of many international students in the United States as a safe study destination, especially amongst Latin Americans. Canadian higher education institutions reported experiencing the “Trump effect” as early as January 2017, with applications from the US up from the previous year at public sector institutions (Chiose, 2017).

At the same time, a growing middle class in Latin America and Asia is increasingly searching for international education opportunities, starting with language education, in both English and French.

There are a number of international forces that position Canada to grow its international education sector as a whole. However, there is still policy work to be done, at both the federal and provincial levels in order for Canada to reach its full potential, including addressing the ability for international language students to work while studying language education¹² and for some provinces to create a legislative and regulatory framework that supports quality and student protection for language education.

⁹ In early 2016, new eligibility requirements for the King Abdullah Scholarship, including limiting the institutions Saudi Arabian students can choose to study in, and reducing the amount of language education that can be covered (Paul, 2016).

¹⁰ Originally created in 2011 to fund Brazilian student mobility, the program has faced major restructuring, focusing on post-graduate study and research, and limiting language education eligibility. More recently, the program was officially cancelled, with a renewed focus on institutional relationships to encourage mobility (ICEF Monitor, 2017).

¹¹ Proyecta 10,000 is a Mexican government initiative, aiming to boost student mobility to Canada, including in English as a Second Language intensive courses (AMCID, 2016; Spanish source).

¹² Federal regulations on work and study specifically exclude English and French as a foreign language students from the right to work off campus during their studies. For more information, see: <http://www.cic.gc.ca/english/study/work-offcampus.asp>

10. Putting Languages Canada's Student Data into Context

10.3 Changes Facing the Language Travel Market, *continued*

SPOTLIGHT:

Off-Shore Language Education: The New Frontier

Travel for language education has been a consistently growing sector for several decades. But it has always been recognized as one with an upper capacity limit. Put simply, travelling for education is expensive. Relatively few individuals around the world will be able to afford the estimated \$960/week needed to study language education while living abroad.

Technological improvements, and a global recognition of the importance of internationalization (even in the absence of travel) has started to change the market. Teacher mobility and training, online education, and curriculum sharing are now becoming buzzwords in the international language education sector.

This new frontier has the promise of expanding access to language education far beyond the limits of those who can afford it. The sector is slowly but surely adapting to this new opportunity, and there are already exciting developments taking place!



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Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



