

# 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.

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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.