

Executive Summary



The Languages Canada 2017 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, 2017, Languages Canada had 217 member programs, down slightly from 220 member programs in 2016. The number of full voting member institutions was 165 (some members operate more than one program, accounting for two separate memberships.) Of these member institutions, 101 were private and 66 were public. A 6:4 ratio of private to public members has remained relatively constant over the life of the association.

In 2017, 149,379 students enrolled in Languages Canada member programs, up about 10% from 135,425 students in 2016. However, when controlling for changes in Languages Canada membership, (i.e. comparing only data from members programs that remained constant from 2016 to 2017) the overall growth rate of student numbers was closer to 12%. This is more indicative of the growth rate of the overall Canadian language education sector.

2016 to 2017 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 Manitoba (25%), Quebec (14%), Ontario (16%), Alberta (12%) and British Columbia (7%), while decreases in student numbers were reported in Nova Scotia (-7%) and Saskatchewan (-1%).

The overall number of student weeks increased from 1,501,083 in 2016 to 1,610,495 in 2017. Average length of study decreased, however; **in 2017, students studied an average of 10.8 weeks, versus 11.1 weeks in 2016.** On average, students in public programs studied much longer than students in private sector programs (15.3 weeks versus 9.5 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 2017, either with a study permit for education of over six months or a visitor's visa. **The proportion of study permit-holding students remained consistent from 2016 to 2017 at 28%.** The number of non-visa holding students also remained constant. 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 16,153 in 2017, up from 12,632 in 2016.**

Languages Canada's French-language programs welcomed 9,402 students in 2017, representing 6% of the overall student population. 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.

The survey revealed that **48,317 students intended to continue on to post-secondary studies in 2017, representing approximately one third of all students attending Languages Canada programs.** This includes students in pathway programs (17,818); students studying English or French for academic purposes (17,208); and students studying general English or French with intent to enter into further studies (13,291).

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The top five source countries for 2017 were: Brazil (23,533), Japan (20,589), China (16,197), Korea (15,040) and Mexico (12,780). The top five reported source countries were consistent with last year. Year-over-year growth from 2016 to 2017 was reported for students from all top source markets except Canada, Saudi Arabia, Taiwan and Turkey.

Student numbers from Mexico and Vietnam showed the highest rates of growth since 2016, at 41% and 203%, respectively. Student numbers from Saudi Arabia have continue to drop drastically, as a result of changes to the King Abdullah Scholarship Program, and declined from over 15,000 in 2012 to 3,834 in 2017.

French programs showed different patterns in student numbers, with the highest number of students originating from Canada (1,973), the United States (1,004), Mexico (767), Brazil (760) and China (505).

Languages Canada's 2017 international business development activities focused on five markets: Mexico, Colombia, Brazil, and Italy/Eastern Europe. Target markets for business development activities in 2015 and 2016 were Brazil, China, Colombia and Vietnam. Student numbers from all markets targeted by Languages Canada increased from 2016 to 2017. **Looking ahead, Languages Canada members identified China, Brazil, Mexico, Vietnam, Colombia and Turkey as the top countries of interest for marketing and promotion purposes.**

Languages Canada members employed 4,827 teachers and 2,194 staff in 2017. The number of teachers increased over 2016, consistent with an increase of student numbers.

Members identified **in-Canada competition from other programs** as their biggest challenge, as well as **student visa denials and visa processing times**.

Tuition and living expenses paid by language students in **2017 generated an estimated \$1.6 billion in export revenue for the Canadian economy and contributed \$204 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.