

BONARD

STATE OF THE LANGUAGE EDUCATION SECTOR IN CANADA

Languages Canada Annual Conference



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**Head of
Research**

Established in 2007, BONARD is a **market intelligence** and **strategic development firm** specialising in international education. We leverage our global knowledge and connections to help our clients grow in the vibrant global market.

OUR TEAM



4
Offices



40
Specialists



468
Projects

MEMBERSHIPS



OUR CLIENTS

DESTINATIONS



ASSOCIATIONS



PROVIDERS

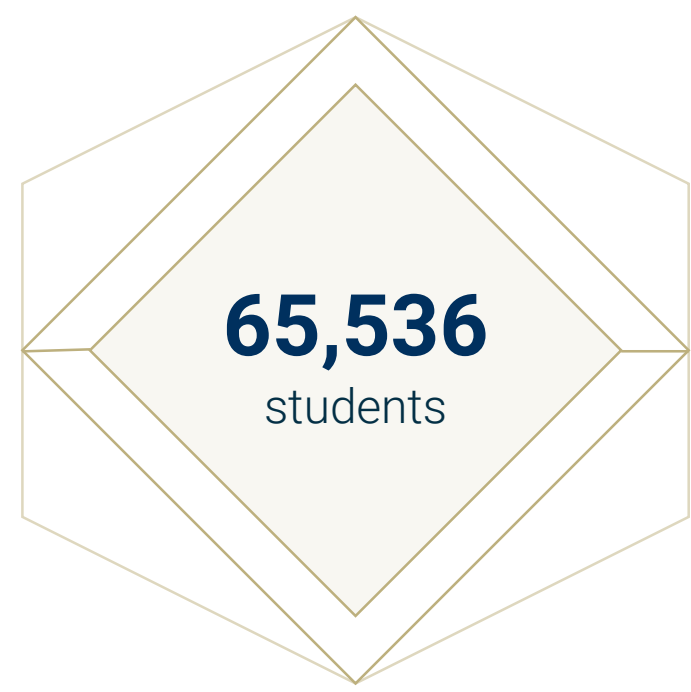




2020 in Review

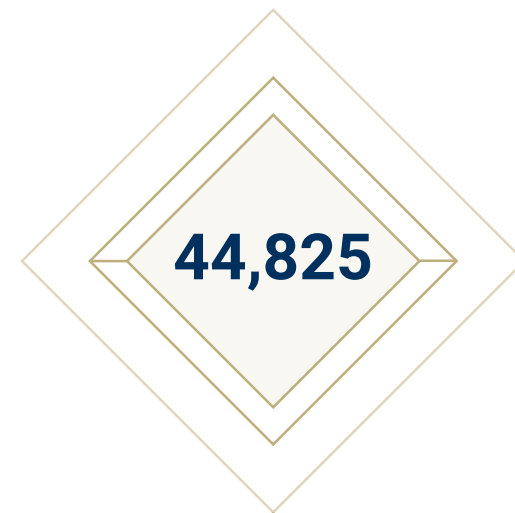


LANGUAGE EDUCATION IN CANADA 2020



Source: Languages Canada Annual Member Survey, n=194 programs

Student numbers by sector



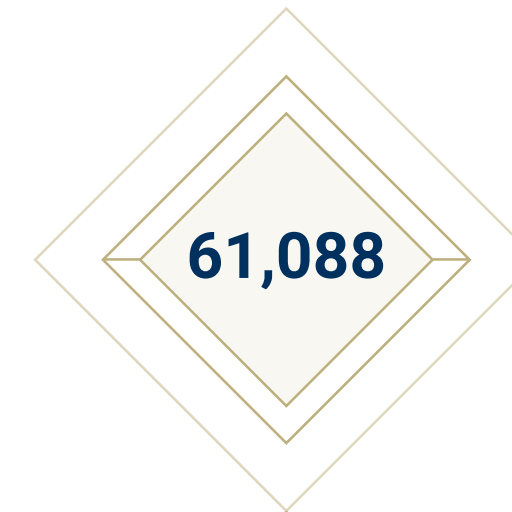
**PRIVATE
SECTOR**
-61%
compared to 2019



**PUBLIC
SECTOR**
-39%
compared to 2019

Source: Languages Canada Annual Member Survey, n=194 programs

Student numbers by language



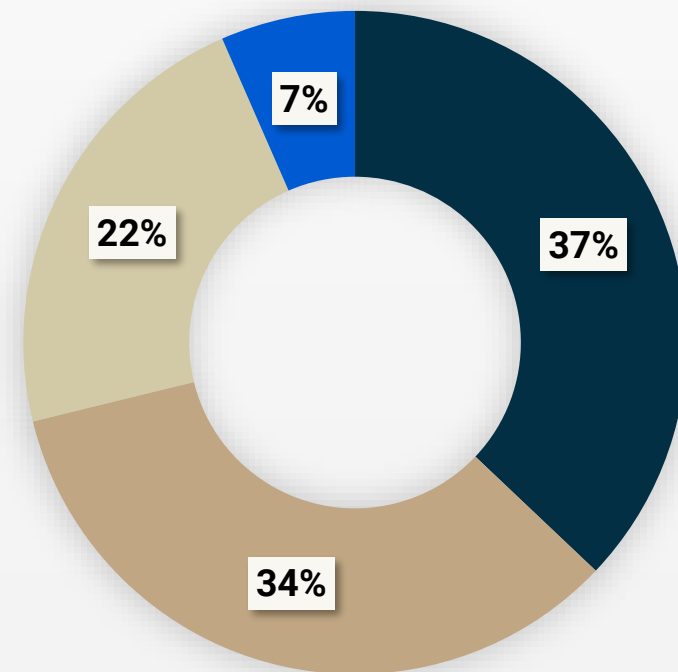
ENGLISH
-56%
compared to 2019



FRENCH
-57%
compared to 2019

Student weeks by instruction type

- In-person/face to face classes
- Online (only) in Canada
- Online (only) outside Canada
- Hybrid/blended model (in-person and virtual)



TOP 10 SOURCE COUNTRIES

STUDENT NUMBERS BY SOURCE COUNTRY (OVERALL) : YEAR-ON-YEAR CHANGE

	2019	2020	% CHANGE
China	15,330	8,897	-42%
Brazil	22,891	7,726	-66%
Japan	17,693	5,566	-69%
South Korea	12,560	5,163	-59%
Mexico	14,962	4,431	-70%
Colombia	4,697	3,620	-23%
Canada	5,663	3,222	-43%
Vietnam	3,046	1,546	-49%
Turkey	3,085	1,475	-52%
Russia	1,649	1,141	-31%

Source: Languages Canada Annual Member Survey, n=194 programs

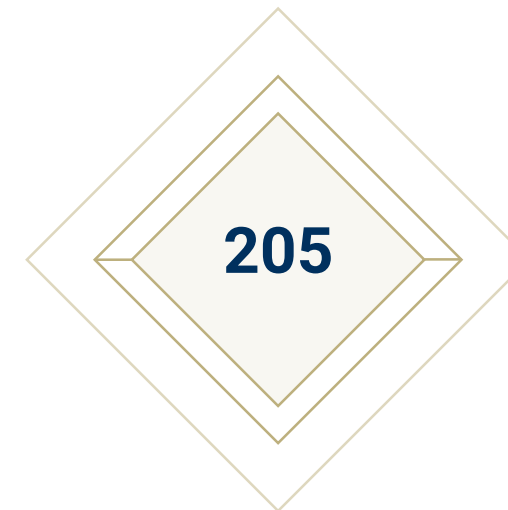


State of the Language Education Sector in Canada

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- Evaluation of the **global language education sector and Canada's position within it**, thus identifying building blocks for future success.
 - Key **factors driving a student's decision on study destination** as well as the **most impactful barriers to entry** of international students into Canada's English and French language programs.
 - Overview of **initiatives which can be used to mitigate the current and future impacts of Covid-19** on the language education sector in Canada.
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Responding programs

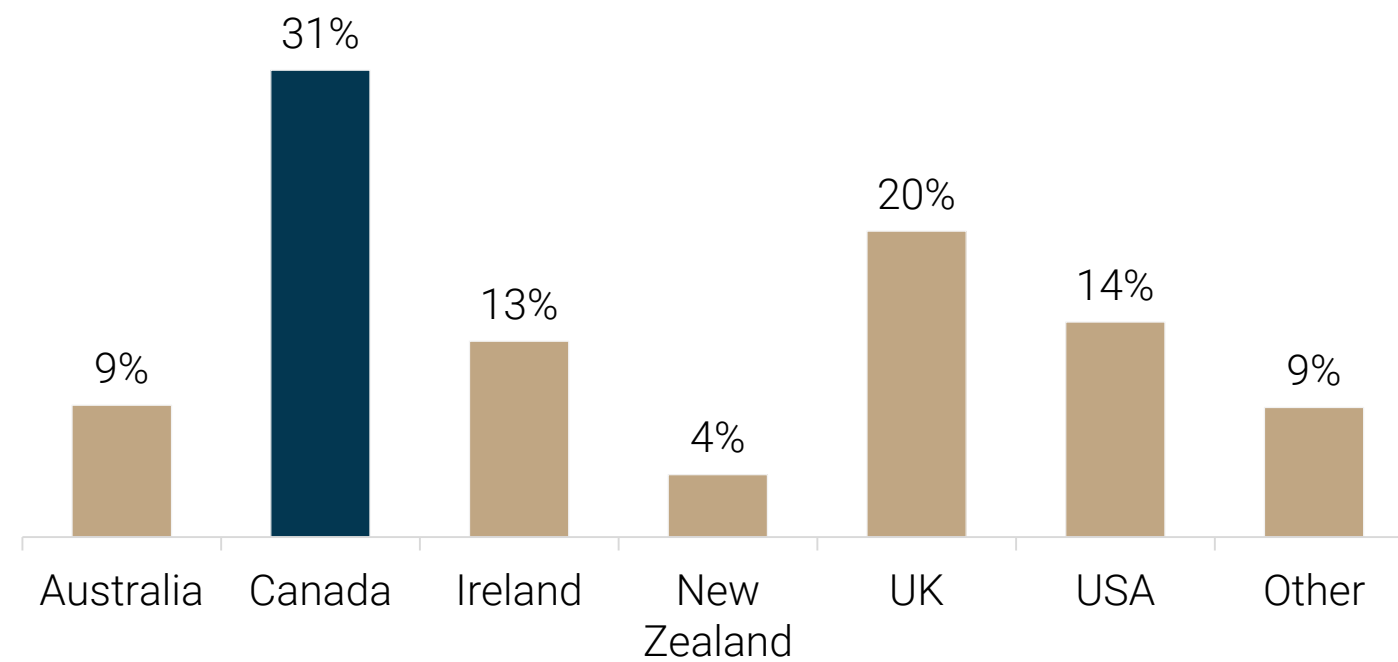


Responding agencies

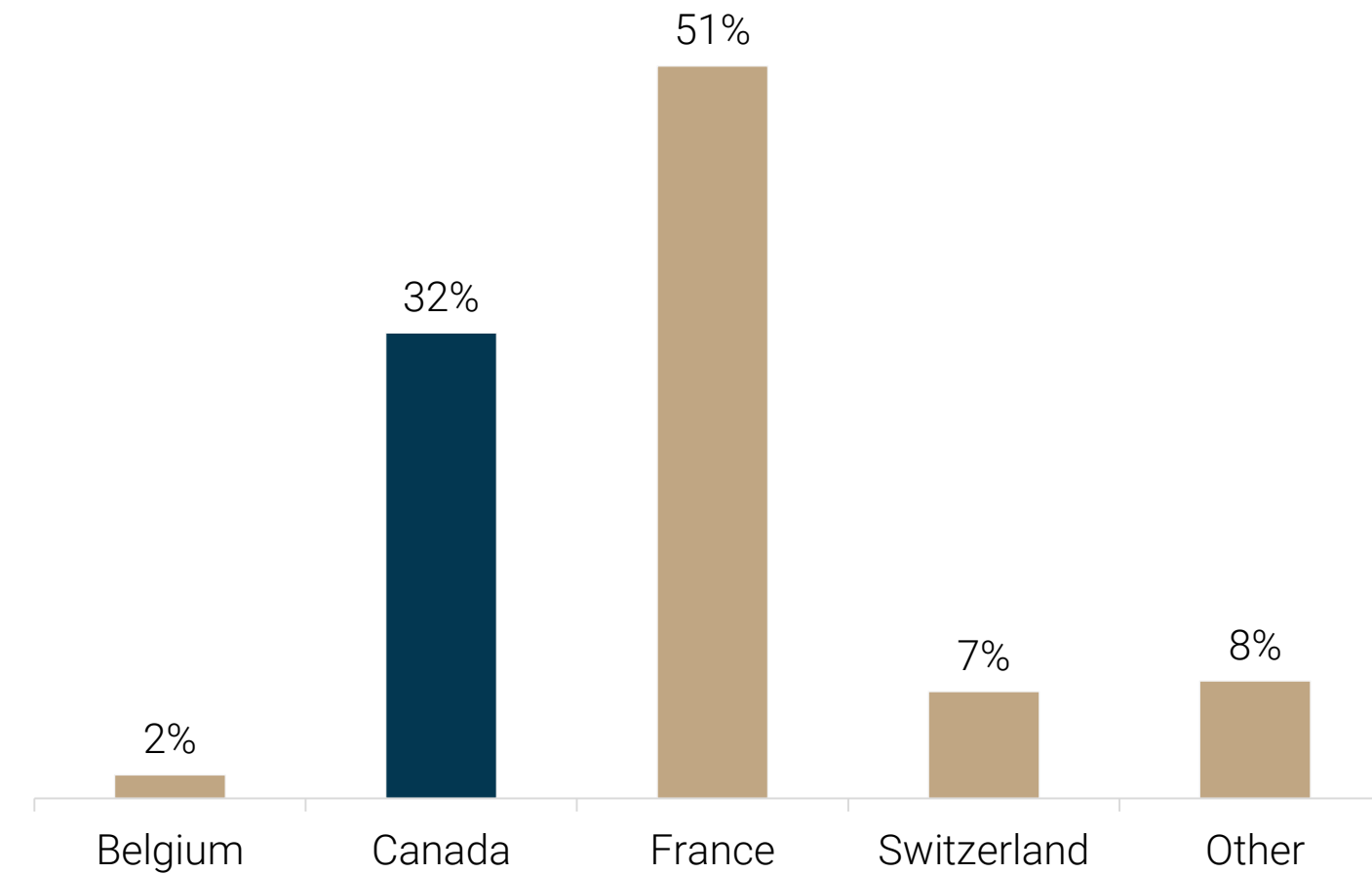
KEY LEARNING OUTCOMES

Percentage of prospective students considering studying English or French in the following destinations in 2021

English



French



» Demand levels for language courses in Canada

- Incremental recovery rather than a sudden return to full mobility.
- **In Q2 2021**, Canadian programs anticipate operating at **29% of their respective 2019 student volumes**.
- Compared to 2019, agencies forecast recovering **31% of bookings to Canadian institutions in 2021** and **55% of bookings in 2022**.

» Student preferences and perspectives

- 31% of students who are considering studying English abroad in 2021 are preferring Canada.
- The highest-rated factor in students' decision making was **motivation to choose a destination with the most favorable entry conditions** (24% of agencies).

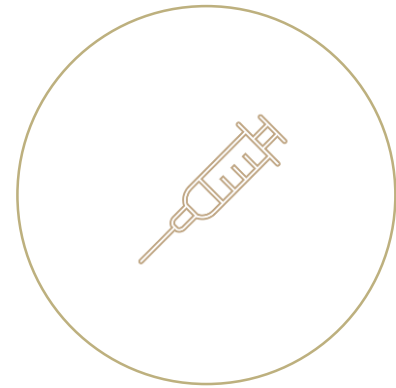
» Barriers and challenges

- **Drop in demand to study in Canada due to the existing entry conditions** was cited the biggest challenge faced by Canadian programs (79%), followed by changing quarantine and Covid-19 testing requirements (65%).
- Both agencies and programs consider better entry conditions, such as **lifting the compulsory 72-hour hotel quarantine**, as the most important factor to facilitate market recovery.

» Future outlook

- Without the existing federal government subsidy programs, **54% of programs will cease their operations within 6 months**.
- Reducing the cost of entry and quarantine would constitute a significant boost in terms of member programs' survival: **40% of programs believe they would increase their student recruitment** and **30% that they would be able to sustain operation of their business over the pandemic period**.

KEY LEARNING OUTCOMES



Include international students in Canada's vaccination rollout



Optimize visa processing to reflect market conditions



Improve communication and information-sharing with stakeholders



Run sector-specific support schemes



Improve entry conditions into Canada

THANK YOU

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