Languages Canada
2014 Annual Survey Report

Languages Canada
Langues Canada

Executive Summary

We are pleased to present the results of our survey, which shares insight into the language education sector in Canada. This report presents findings from the 2014 Languages Canada annual survey conducted in February of 2015. Thank you to all 225 member programs who participated and returned completed surveys. As a result of this full response, this report can provide the most accurate picture possible of the state of our industry in Canada, with no need to extrapolate figures.

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Long-term trends across all markets showed student numbers recovering, after having decreased in 2013. **In 2014, the overall number of students enrolled at Languages Canada member programs increased to 137,416, up from around 129,704 in 2013.** This increase was due, in part, to a larger number of member programs.

There are a number of findings within this report that provide insights into the sector. **The average study period at member programs varied between 4 and 12 weeks.** Students enrolled in Canadian language programs were predominantly from two groups: those who obtained study permits and those who entered Canada as visitors without a visas. However, **55% of students require some form of visa to enter the country, compared with 35% of students who require no visa for short-term study. Student bookings were mostly completed individually**. Private institutions were twice as likely to use agents as public institutions. Students attending public sector institutions, or pathway programs, stayed for significantly longer periods of time.

The survey revealed **48,368 students intended to continue on to post-secondary studies**, although the number is likely higher, as not all institutions were able to track and report this data.

Students enrolled in French-language programs stayed for shorter periods of time and were more likely to be from Canada. The average number of student weeks remained roughly the same as for English programs at an average of 12.0 weeks per student.

The top 5 source countries for 2014 were: Brazil (20,128), Japan (20,081), China (17,685), South Korea (15,571) and Saudi Arabia (10,497). French programs showed different patterns in student numbers, **with the highest number of students originating from Canada (2,712), the United States (766), Brazil (677), Mexico (585) and China (303)**. The top 5 markets of interest to our members were: Brazil, China, Mexico, Vietnam and South Korea.

Members clearly stated their **biggest challenges included visa approvals, specifically denials or delays in the processing of student visas, and competition from other language programs both within and outside Canada**. French programs reported facing the same difficulties, despite the lower number of international students. Programs continued to experience different levels of challenges due to regulatory changes at the provincial and federal levels.

Notwithstanding these challenges, tuition and living expenses paid by language students generated **an estimated $1,485,000,000 for the economy**.