

State of the Sector: Recent Trends and Canada's Current Market Position

Languages Canada Annual Conference | March 2022

BONARD

Expertise in International Education

Empowering growth.

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

[Visit our website](#)



Our team and expertise.



4
Offices



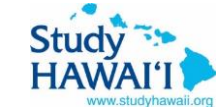
56
Specialists



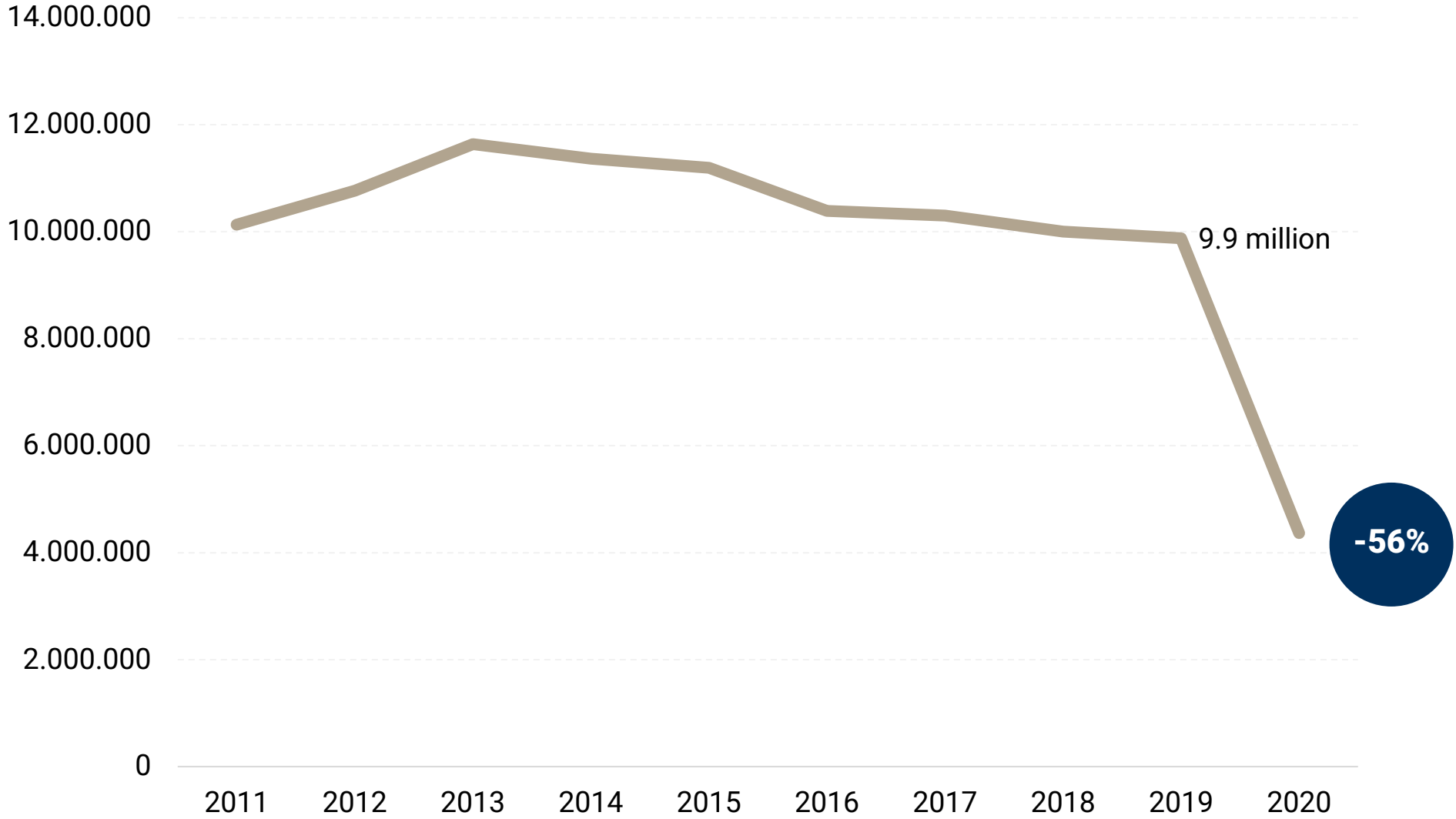
521
Projects conducted



Our clients.



International Student Mobility: Student Weeks



17%

of all ELT students
chose Canada in 2020

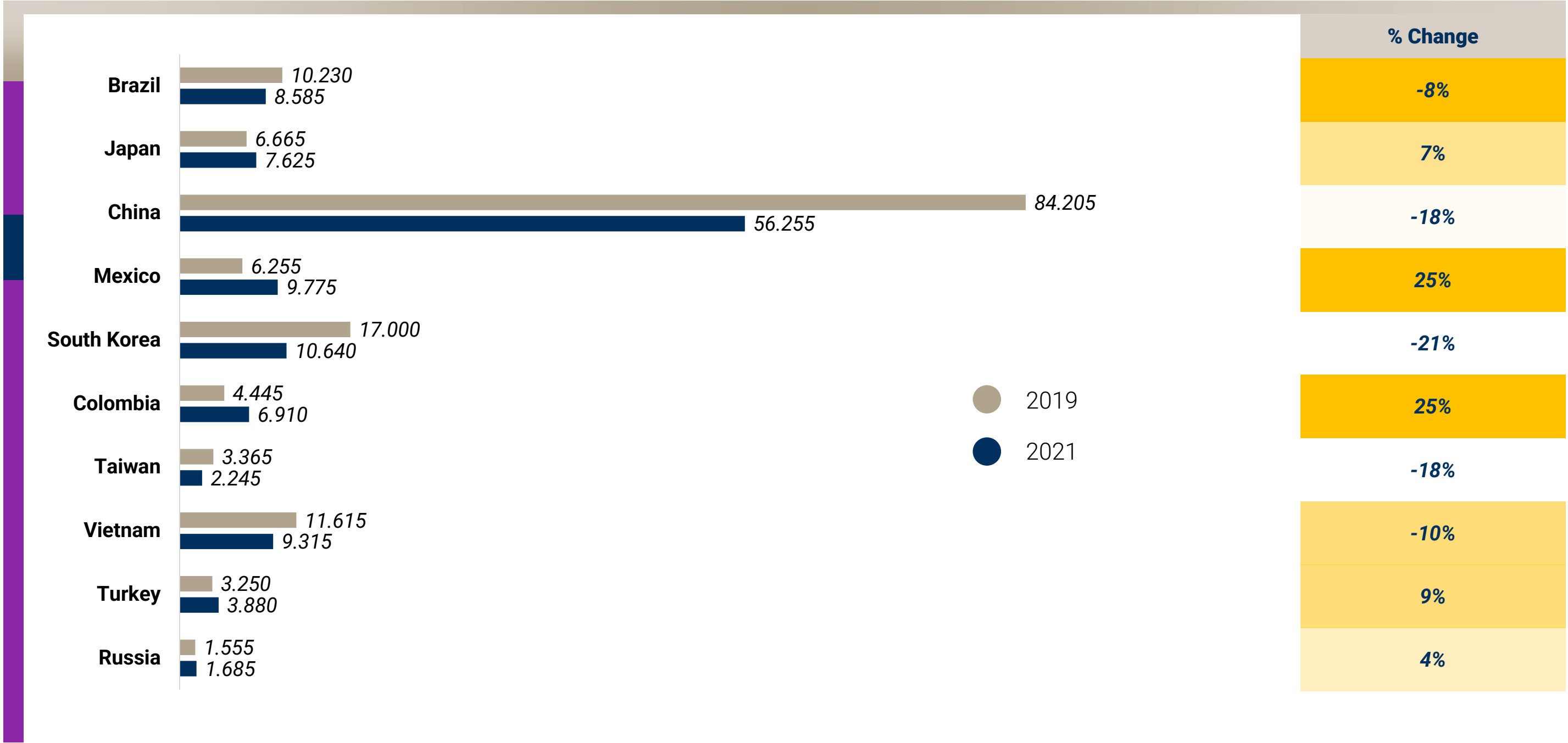
19%

of student weeks globally
were spent in Canada in 2020

Source: BONARD, 2021; EduSA, 2021; English Australia, 2021; English New Zealand, 2021; English UK, 2021; Institute of International Education, 2021; Languages Canada, 2021; Marketing English in Ireland, 2021; NSO Malta, 2021; SEVIS, 2021

Canada: Top Source Markets

IRCC: Study Permit Holders



Source: IRCC, 2022

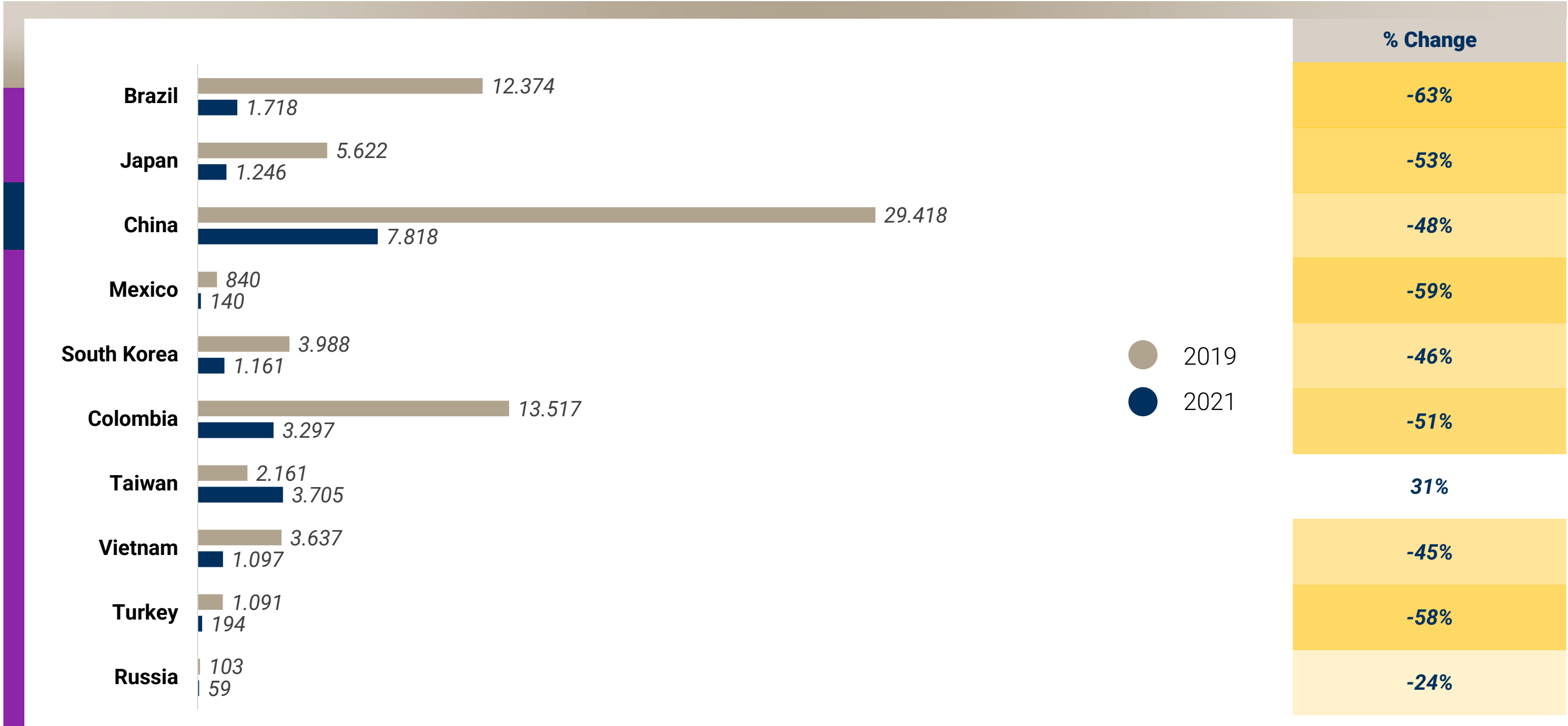
Canada: Growing Source Markets in 2021 (IRCC)

	2019	2020	2021	2019 vs 2021 (% change)
Mexico	6,255	3,655	9.775	25%
Colombia	4,445	3,015	6.910	24%
Bangladesh	4,915	3,165	6.635	16%
Hong Kong	2,490	2,605	6.380	60%
Germany	2,275	795	5.170	31%
Italy	1,465	790	2.980	42%
Sri Lanka	970	795	1.955	42%
Nepal	765	530	1.735	51%
Peru	685	445	1.685	57%
Ecuador	850	590	1.570	36%

Source: IRCC, 2022

Australia: Selected Source Markets in 2021

ELICOS students



Source: DESE 2022

Canada: Top Source Markets for Member Programs in 2021



2022 Languages Canada Annual Survey preliminary data

Top 5 source markets for member programs in 2021

- Japan**
- Colombia**
- China**
- Mexico**
- Brazil**

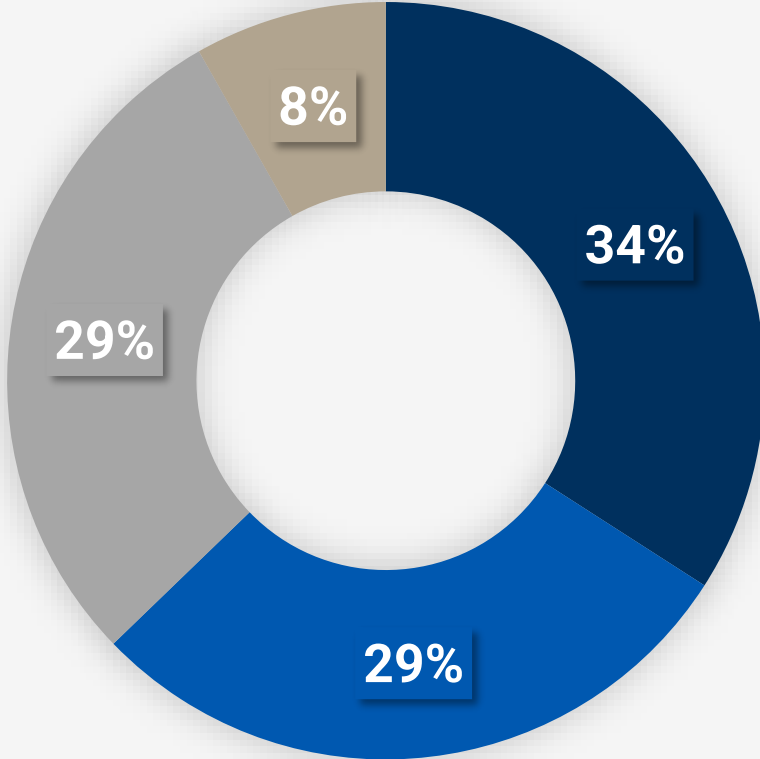
Source: Languages Canada 2022

Delivery methods: 2021 Preliminary Findings

2021 Annual survey

(n=158 member programs)

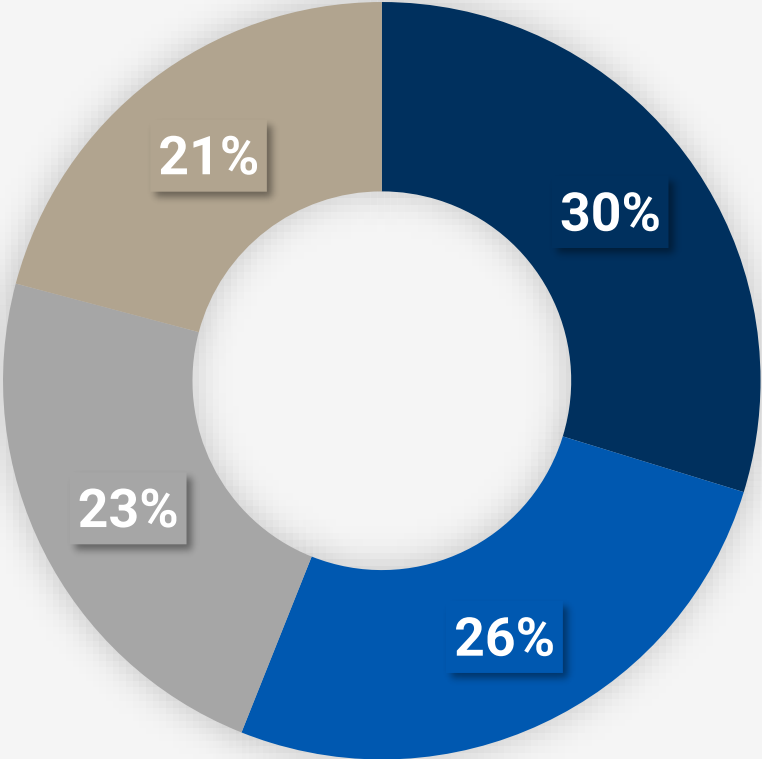
Unit: Student weeks



2022 Annual survey preliminary data

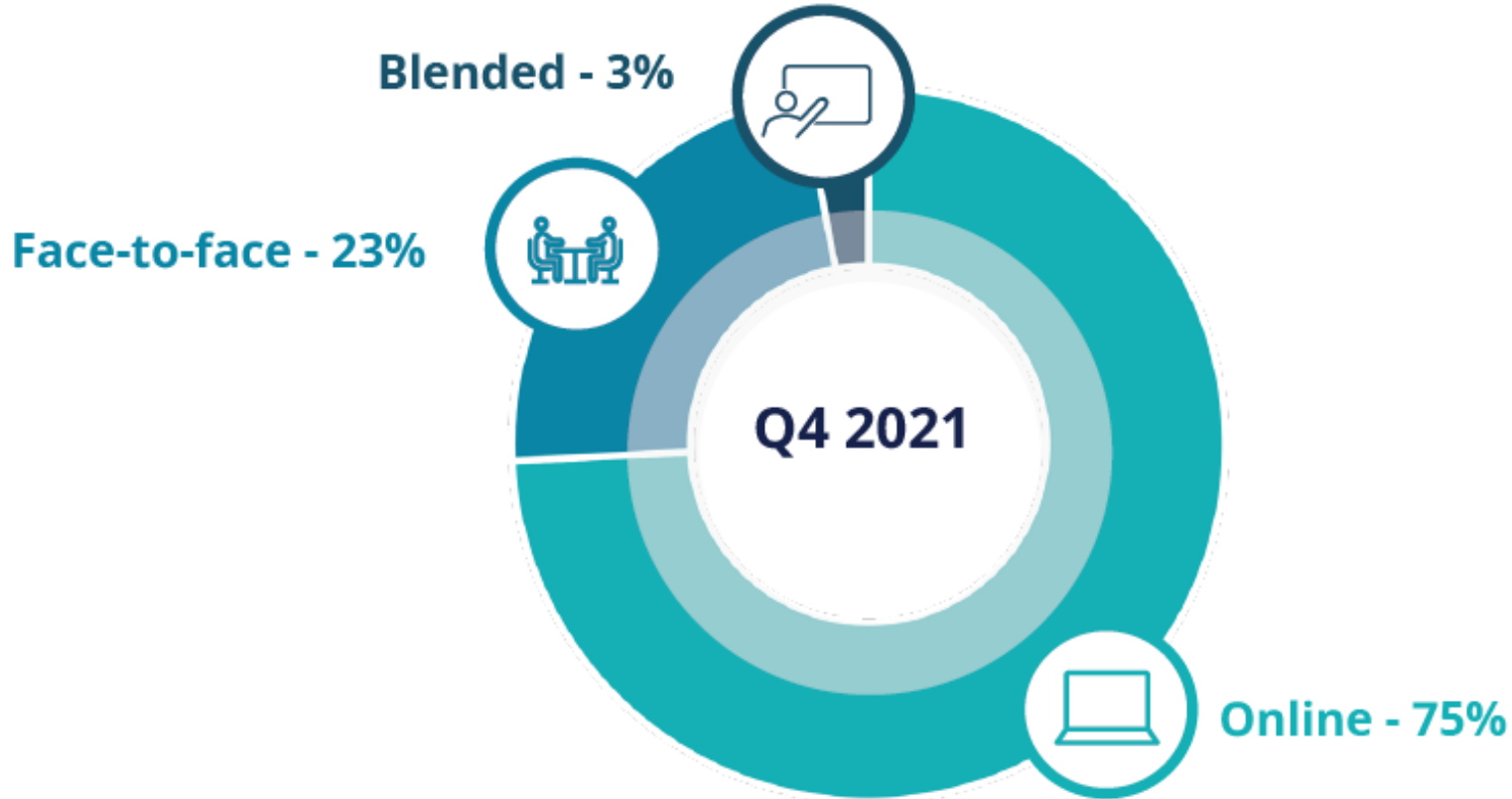
(n=111 member programs)

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

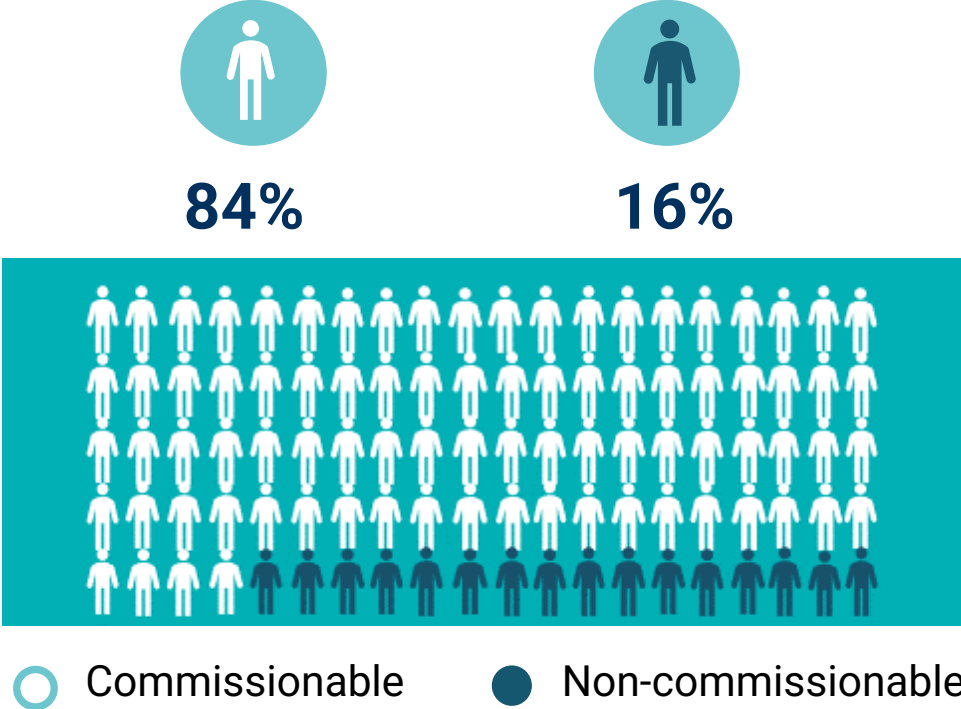


Destination Comparison: Australia

Delivery methods per quarter



Students by booking source per quarter



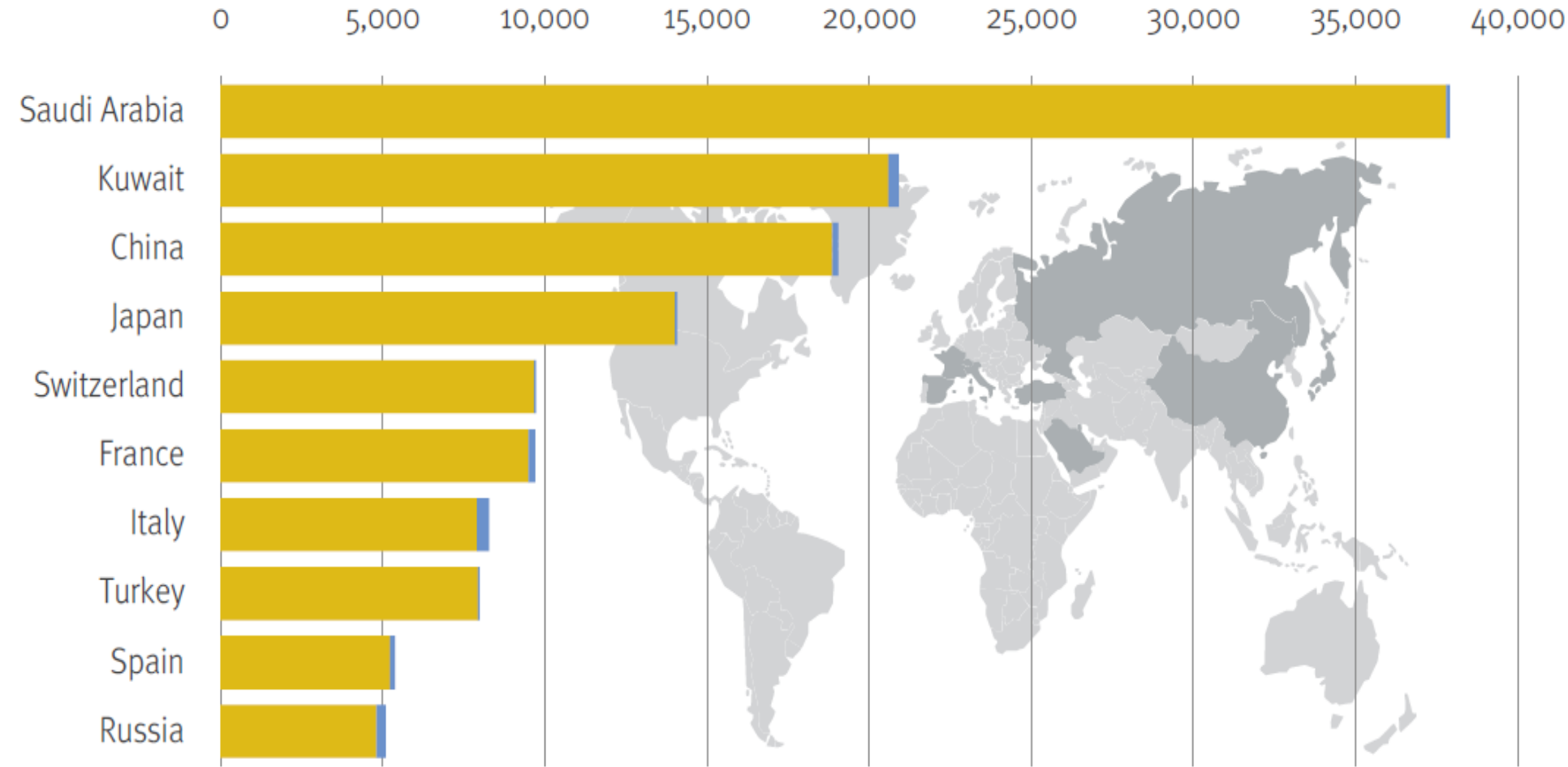
Source: English Australia, 2022 Quarterly ELICOS data



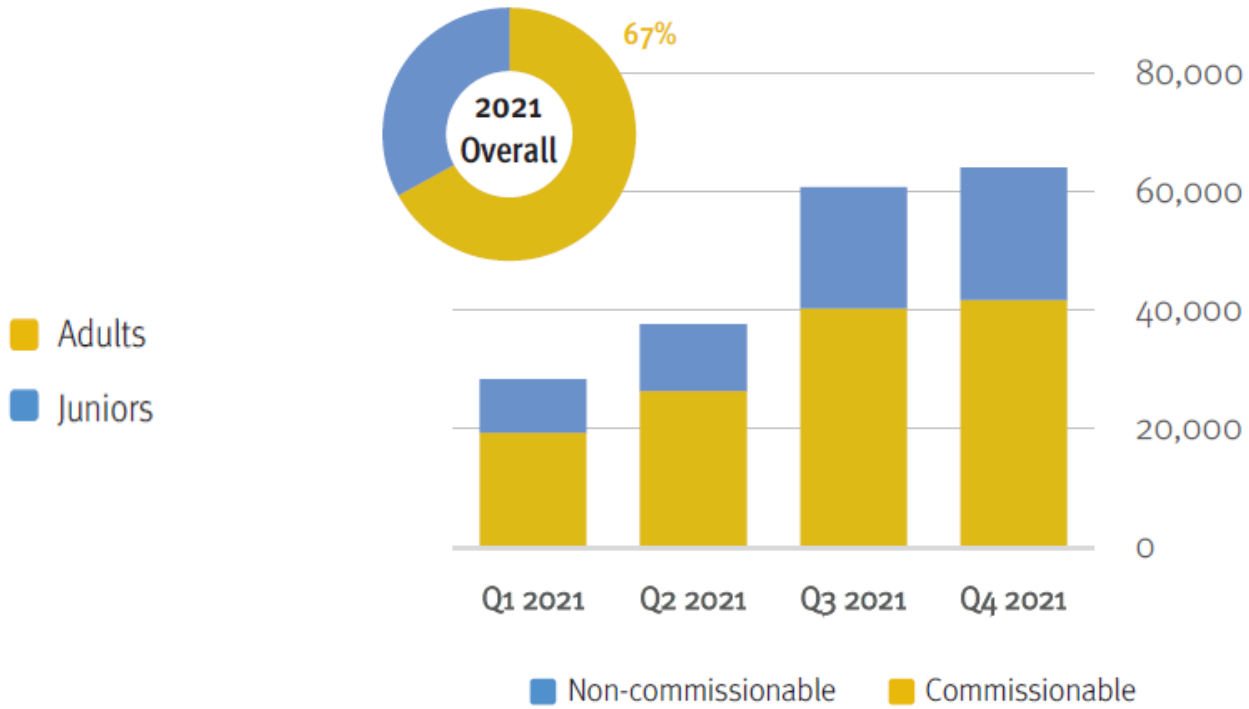
Destination Comparison: UK

English UK

Student weeks by age group and source country (top 10 markets) in 2021



Student weeks by booking source per quarter

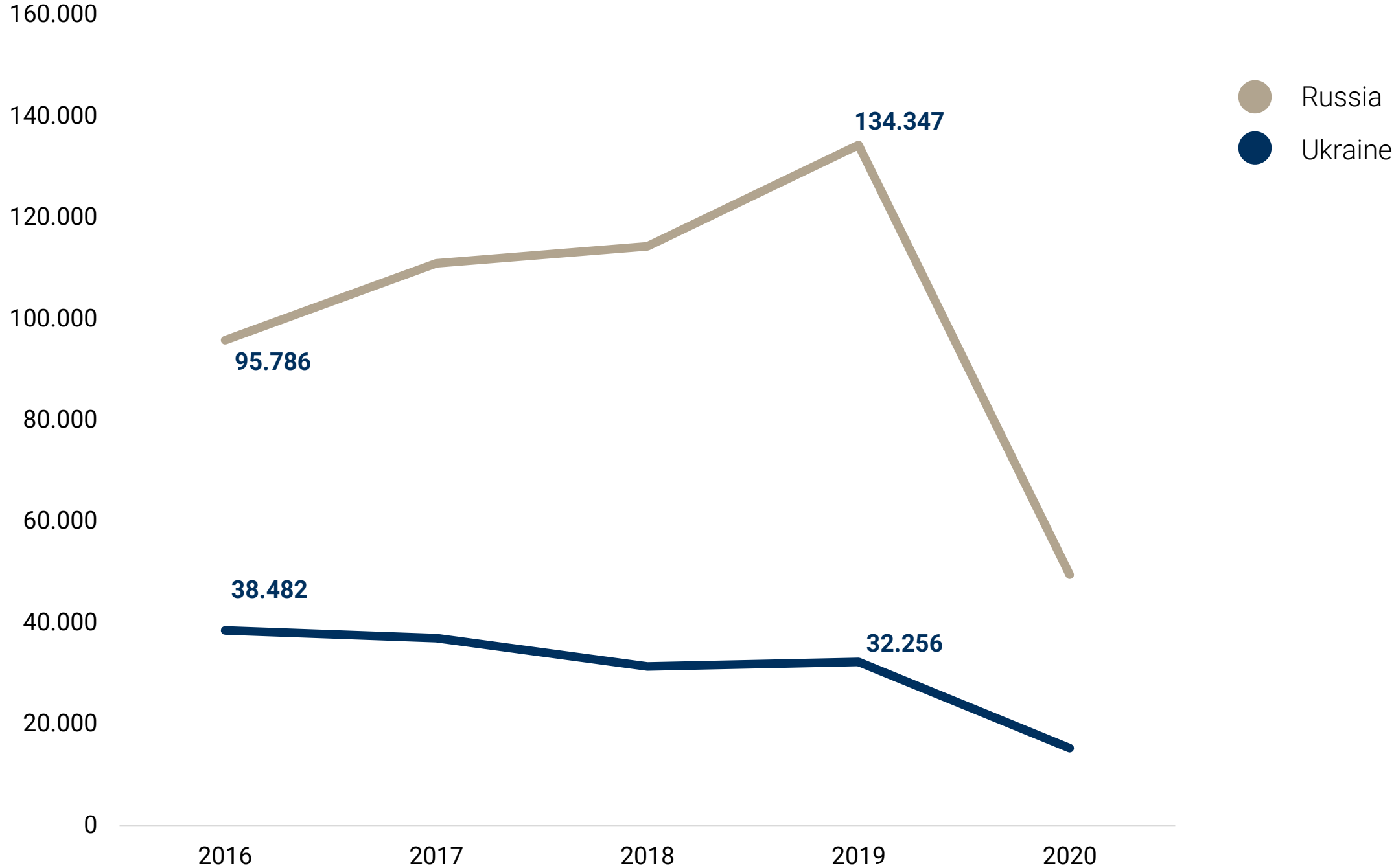


Source: English UK, 2022 Quarterly Data Cohort



Selected Markets: Ukraine and Russia

Unit: Student weeks



27%

of all student weeks from Ukraine were spent in Canada in 2019

9%

of all student weeks from Russia were spent in Canada in 2019

Source: BONARD, 2021

Canada vs. Competitive Destinations

International strategy Study campaigns Student visa regulations

Canada

Building on Success: International Education Strategy 2019-2024

EduCanada

Study permit - CA\$150
Average visa processing time 11 weeks

Visitor visa - CA\$100
Average visa processing time 67 days

UK

International Education Strategy (2021 update)
Supporting Recovery, Driving Growth

Study UK

Great Britain Campaign
English with Confidence

Student visa Tier 4 (apply from outside the UK) - £348

Short-term student visa (6 months) £186

Visitor visa - £95
Extended visa validity periods for those unable to travel during the pandemic and students already in the UK are allowed to apply for new visas without having to leave the country
Average visa processing time – 3 weeks

Australia

Australian Strategy for International Education 2021- 2030

Study in Australia

Study Australia Partnership (Study NSW)

International students need the Subclass **500 Student visa** to study in Australia (unless exempt), which costs from **AU\$630**

Average visa processing time 2.8 weeks

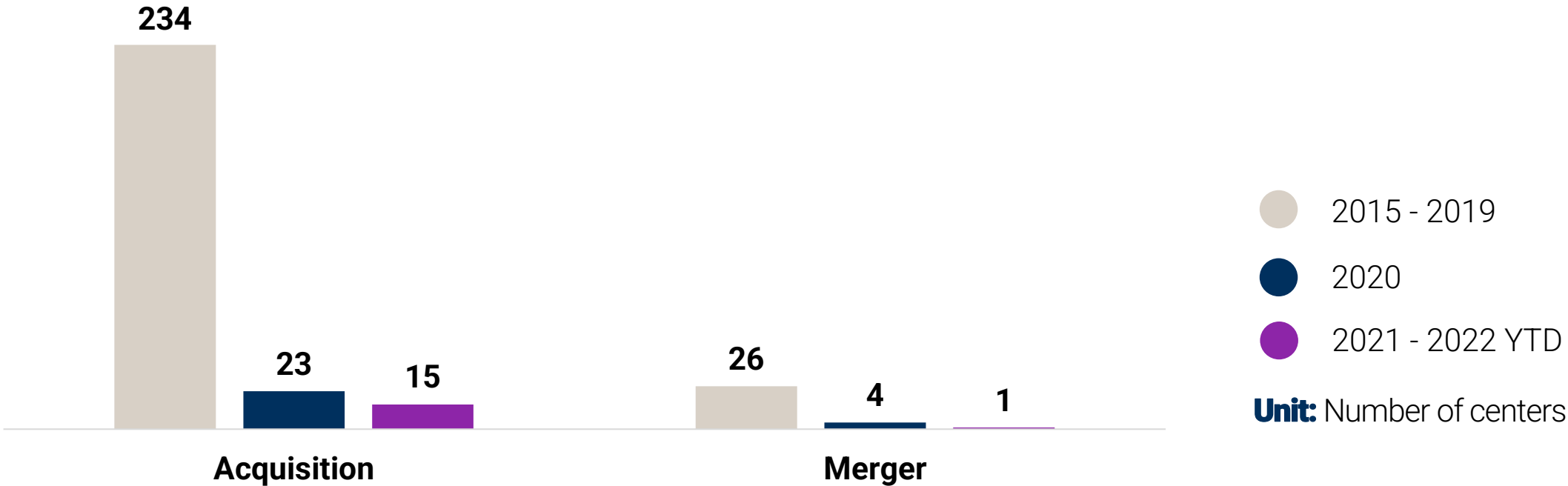
Visitor visa - AU\$145
Average visa processing time 2.6 weeks

Source: Individual destinations, 2022

Canada vs. Competitive Destinations: ELT Associations' Initiatives

	Canada	The UK	Australia
Research- and data-driven outcomes	<ul style="list-style-type: none"> State of the Sector research (2021) 	<ul style="list-style-type: none"> Road to Recovery: English UK Covid-19 impact report Quarterly intelligence cohort 	<ul style="list-style-type: none"> Quarterly ELICOS report Covid-19 economic impact Future of ELICOS interim report 2022 Action Research in ELICOS Program
Marketing	<ul style="list-style-type: none"> Virtual fairs A series of online marketing campaigns Inbound trade mission with Brazilian education agents Marketing activities and direct subsidies to members 	<ul style="list-style-type: none"> Initiative for project to fund the delivery of tailor-made online courses for English teachers' language Antiracism, The Environment and English UK: UK Survey among members English UK Summit – virtual international event StudyWorld Online 	<ul style="list-style-type: none"> Industry event: Reconnecting with Australia: Engagement Strategies Post-border Reopening Monthly CEO updates Quarterly webinars on Quarterly Intelligence Cohort Action Research in ELICOS workshop for 2022
Support for students/providers	<ul style="list-style-type: none"> Marketing strategy and initiatives to reallocate CanExport funding Student/provider support - advocated to help students to get the vaccine in Canada (2021) Push for work rights for language students Study Safe Corridor Participation in ICEF Berlin 	<ul style="list-style-type: none"> Increasing visa flexibility for stays of up to six months, following extended lobbying by organisations including English UK Relaunched professional qualifications for ELT centre staff English UK's campaign to keep ID card travel for ELT students 	<ul style="list-style-type: none"> Supporting international students through mental health difficulties Best-practice Guide in International Student Safety Call for JobKeeper's extension or the implementation of a similar program to support the ELICOS sector Call for an indicative date on border reopening and the return of international students ESOS 2022 review open for consultation EA appointed as the Program Administrator for the Innovation Development Fund

Lingering Effects of Pandemic: M&As in ELT



ELT: ILSC, ELS and Berlitz reveal merger

Posted on Feb 14, 2022 by Sophie Hogan
 Posted in News, under Global.
 Tagged with Canada, Elicos, ELS, ELT, ILSC, ILSC Education Group, US.
 Bookmark the permalink.

Canada-based ILSC Education Group, English language provider ELS and the Berlitz Corporation have announced a merger that will see the creation of "one of the largest and most comprehensive language learning and study abroad platforms in the world" as the language travel sector continues to consolidate.



International House Torquay acquires Accent International

Published on 06/12/21
 UK ELT provider International House Torquay has announced the acquisition of fellow Devon-based school Accent International.

Oxford International Education Group acquires Career College in Canada

Oxford International
 October 20, 2021

0 Comments

- M&A activity sank to the lowest level seen since BONARD began measuring transactions in the sector in 2015.
- More joint marketing activity and strategic alliances are predicted, perhaps best represented by the recent merger of ILSC Education Group, ELS, and Berlitz Corporation into Language Education Holdings.

Canada: Student Housing Market Overview



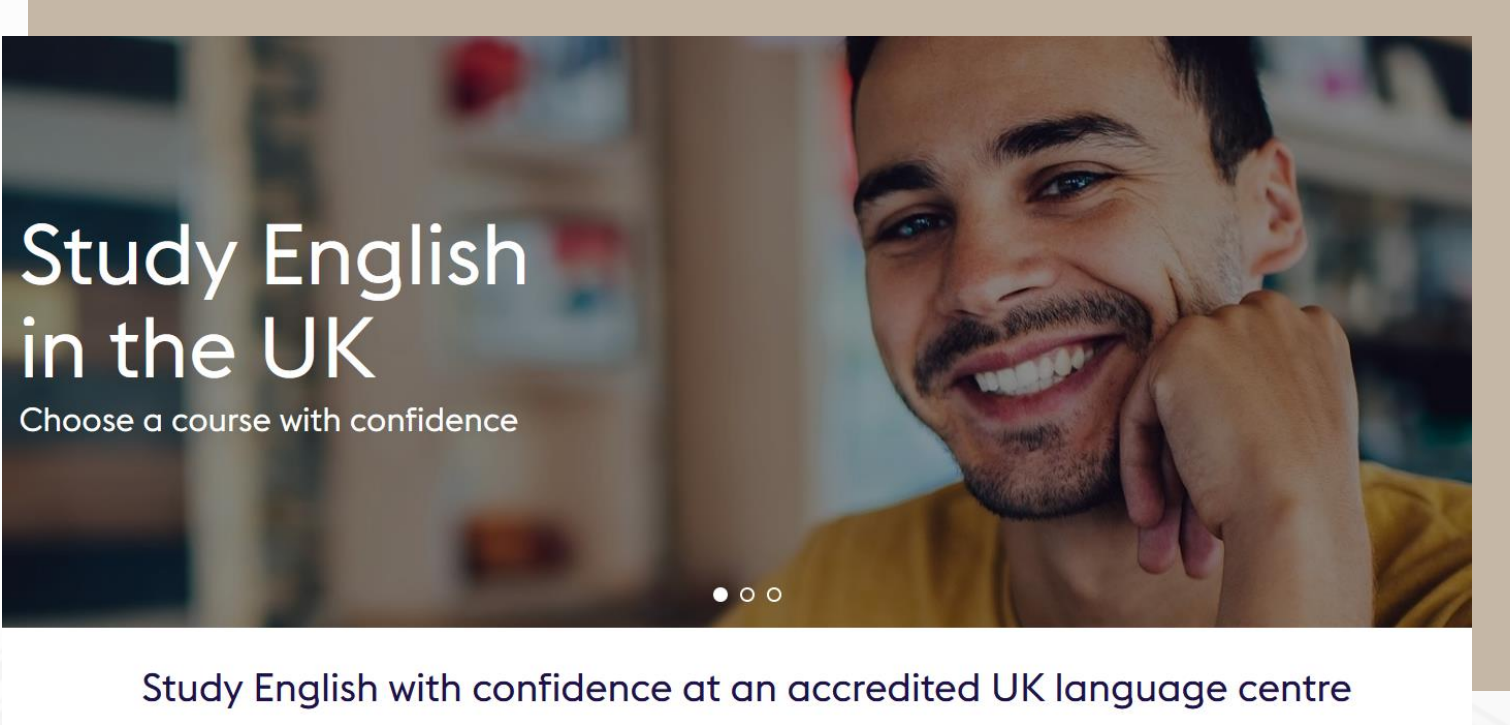
Homestay

VS



Residence

Destination Marketing: English Language Initiatives and Partnerships



English UK:
'English with Confidence' campaign



Study World
Event organized by English UK

Destination Marketing: Inbound Trade Missions

Languages Canada:
Fam tour for agencies



Studying in Canada · Language Educa

SOLD OUT

2022 Inbound Trade Mission with
Brazilian Education Agencies



SOLD OUT

2022 Inbound Trade Mission with
Mexican Education Agencies

Languages Canada:
Inbound Trade Mission with Mexican
Agencies

Destination Marketing: Digital Marketing

UK:
One-stop shop student app

myriad
by UCAS

STUDENTS PROVIDERS INTERNATIONAL

One app. Countless opportunities.

Myriad connects the world to UK higher education by providing a single postgraduate gateway under the trusted UCAS brand. Search courses, research universities, make multiple applications, get matched to funding, and find jobs and accommodation all in one place.

HOW DOES IT WORK FOR STUDENTS?
HOW DOES IT WORK FOR PROVIDERS?

NEW

LEARNS HERE. THERE. EVERYWHERE.

The world has changed. Choose how you study.

Explore our new ways of learning and find a study option that suits you. Dreaming of a future focused education? Learn more about the study options available.

New Zealand:
'International student dedicated web

Australia:
Webinar series

BONARD Webinar Series

Reconnecting with Australia: Engagement Strategies Post-border Reopening

Date & Time
Thursday, March 3, 2022 @ 2pm AEDT
Zoom Webinar, 60 minutes

Market briefing | 15 minutes
Svetlana Cruz, Senior Research Manager, BONARD

Panel discussion | 45 minutes
Han Phil Honeywood, CEO, International Education Association of Australia
Brett Blacker, CEO, English Australia
Toshi Kawaguchi, Director, International Education and Study NSW
Patrik Pavlaic, Head of Research, BONARD (Session Moderator)

Target Audience
Universities, colleges and other education providers
Study clusters and consortia
Education agencies

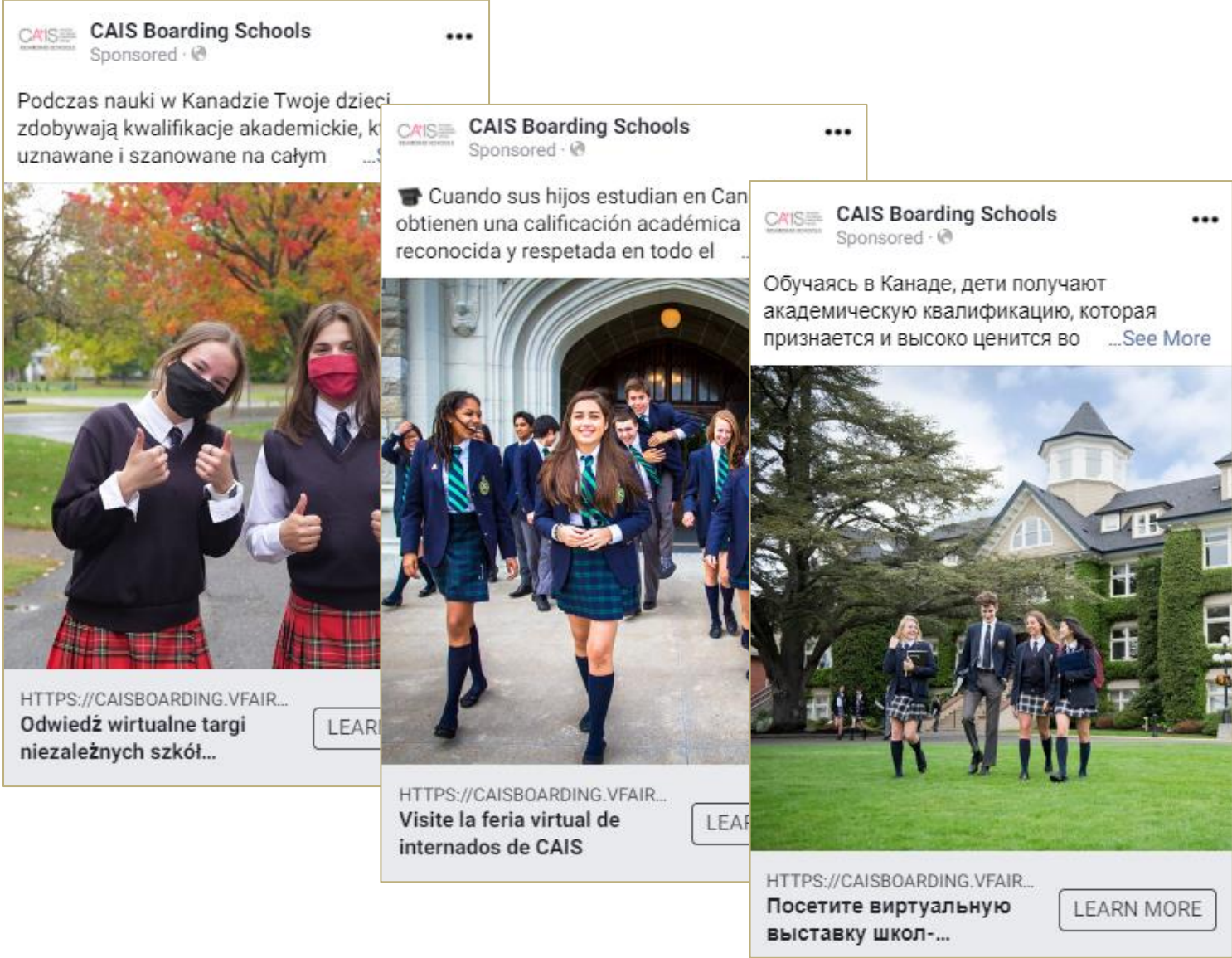
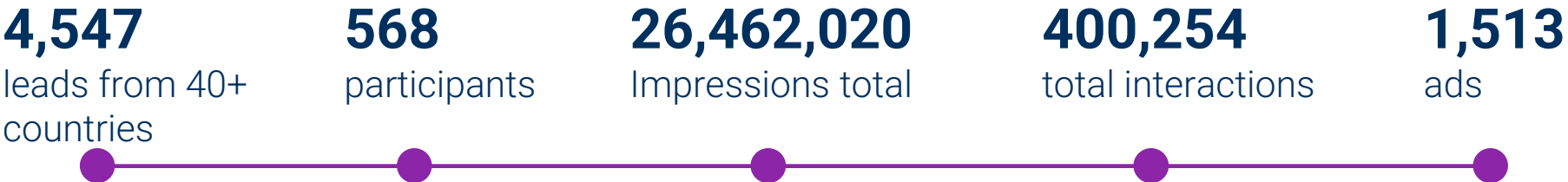
Session Descriptor
With Australia's much-awaited border reopening, sector associations and government bodies prepare for the return of international students. Join this session to learn about the most recent market insights and how you can benefit from Australia's current and future engagement strategies.
The event will kick off with a state-of-the-sector briefing that will deliver essential market intelligence and global perspectives. Afterwards, the session will bring together executives from Australia's leading international education peak bodies who will elaborate on their engagement plans and upcoming initiatives.
Panelists will also discuss how sector associations and government bodies coordinate their approaches to facilitate market recovery as well as share an insider's view on future outlook.
For more information, please contact:
Roberto Diniz, Marketing Manager, BONARD at roberto.diniz@bonard.com

Bonard is hosting a panel discussion webinar this Thursday 3rd March from 2-3pm on engagement strategies with Australia post our borders re-opening.

Digital Destination Marketing Solutions: Virtual student fairs



- Performance marketing
- Media placement
- Performance marketing – non-Western platforms
- Data derived from long-term presence in the source markets and regular research exercises conducted
- Familiarization with product and understanding institution’s objectives
- Our analysts and marketers work together to provide a complex service – strategy, intelligence, execution, and reporting



Source: BONARD, 2021

Canada: Trends

- **Education - predominantly on-site**
- **Demand – incremental increase**
- **Marketing – more options for online**
- **Destinations - preferences will shift**
- **HR & Accommodation supply shortage**
- **Pricing & Inflation – ELT timing**

International Student Mobility: Market Temperature



Strong rebound predicted

- Future student flows: Growth mostly driven by Asian and LATAM countries; increasing intraregional mobility within Asia
- More students, but shorter or same course duration, i.e. student weeks are likely to continue declining



Diversity in delivery modes

- Continuous online delivery



Smart recruitment

- The number of source markets driving growth is decreasing
- Joint marketing
- Customer acquisition costs optimisation
- Future growth in Tier 2 and Tier 3 markets



Increased student support

- Changing demographics: Students will get increasingly younger – development of education roadmaps
- Specialized products for students

Note: Information based on the recent research provided by BONARD, recent conversations with ELT providers and education agencies

Source: BONARD, 2022

Market Monitor

www.bonard.com/mm-ie-subscribe



Contact us for more.

To request a copy of the session presentation or to learn more about our services, please contact us at data@bonard.com.

Come see us

Salztorgasse 2
1010 Vienna
Austria



Samuel Vetrak, MRICS
CEO

samuel.vetrak@bonard.com



Ivana Slobodnikova
Head of International Education

ivana.slobodnikova@bonard.com



Stefan Kolibar
Head of Marketing

stefan.kolibar@bonard.com

BONARD

Follow our latest releases

