

Canada's Global ELT & FLT Market Position and Practical Tips on International Student Recruitment

Languages Canada Annual Conference | February 2023

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Our team and expertise.



4
Offices



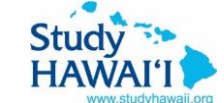
56
Specialists



521
Projects conducted



Our clients.



Global ELT Market: Overview

STUDENT NUMBERS



STUDENT WEEKS



STUDENT NUMBERS: Y-O-Y CHANGE (%)



STUDENT WEEKS: Y-O-Y CHANGE (%)



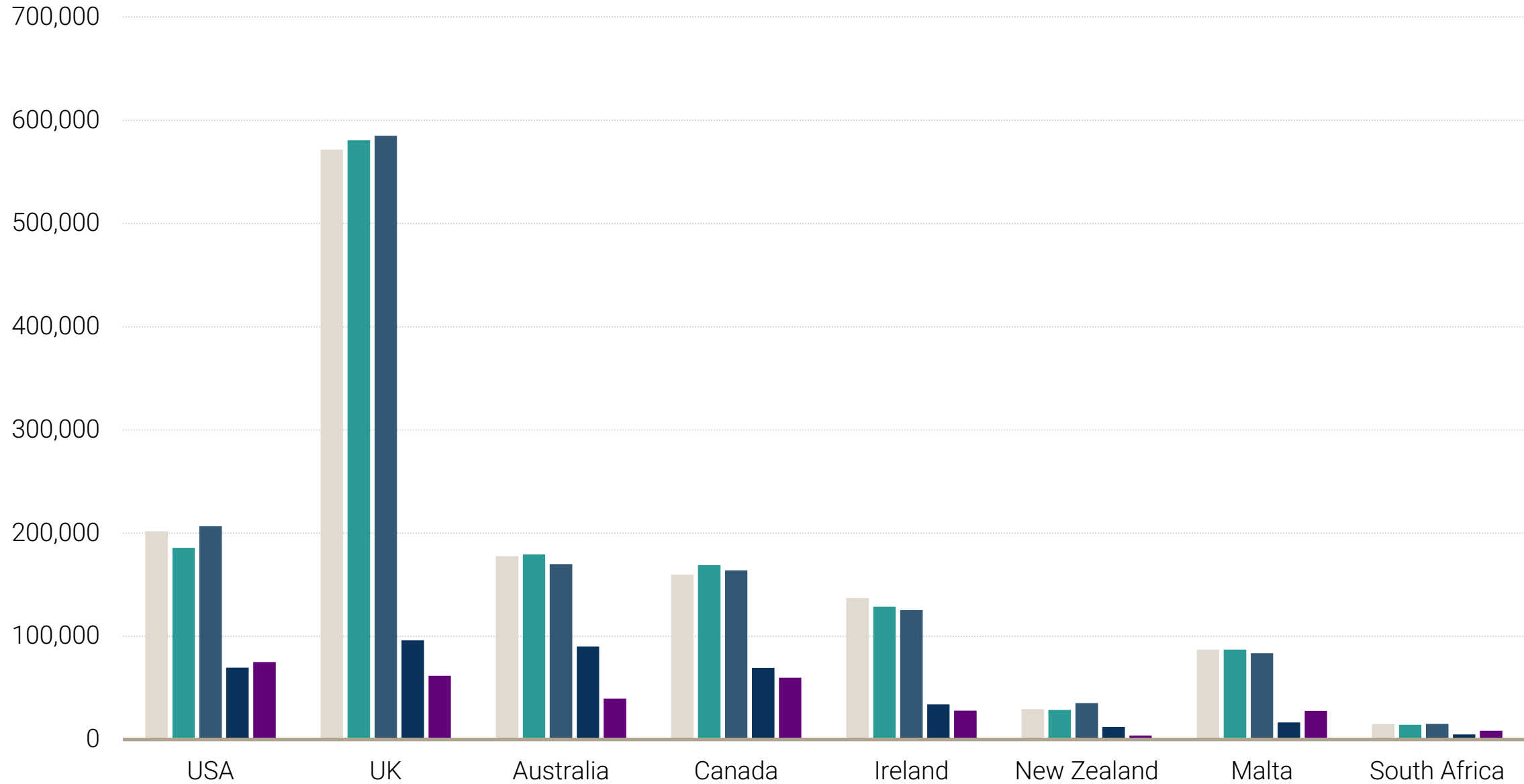
Note: Data covers eight major ELT destinations as follows: Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the USA.

Source: BONARD, 2022; IIE, 2022; SEVIS, 2022; English Australia, 2022; English UK, 2022; Languages Canada, 2022; MEI, 2022; NSO Malta, 2022; EduSA, 2022

Global ELT Market: Top Destinations

STUDENT NUMBERS BY DESTINATION

2017 2018 2019 2020 2021



20%

of all ELT students chose Canada in 2021

vs

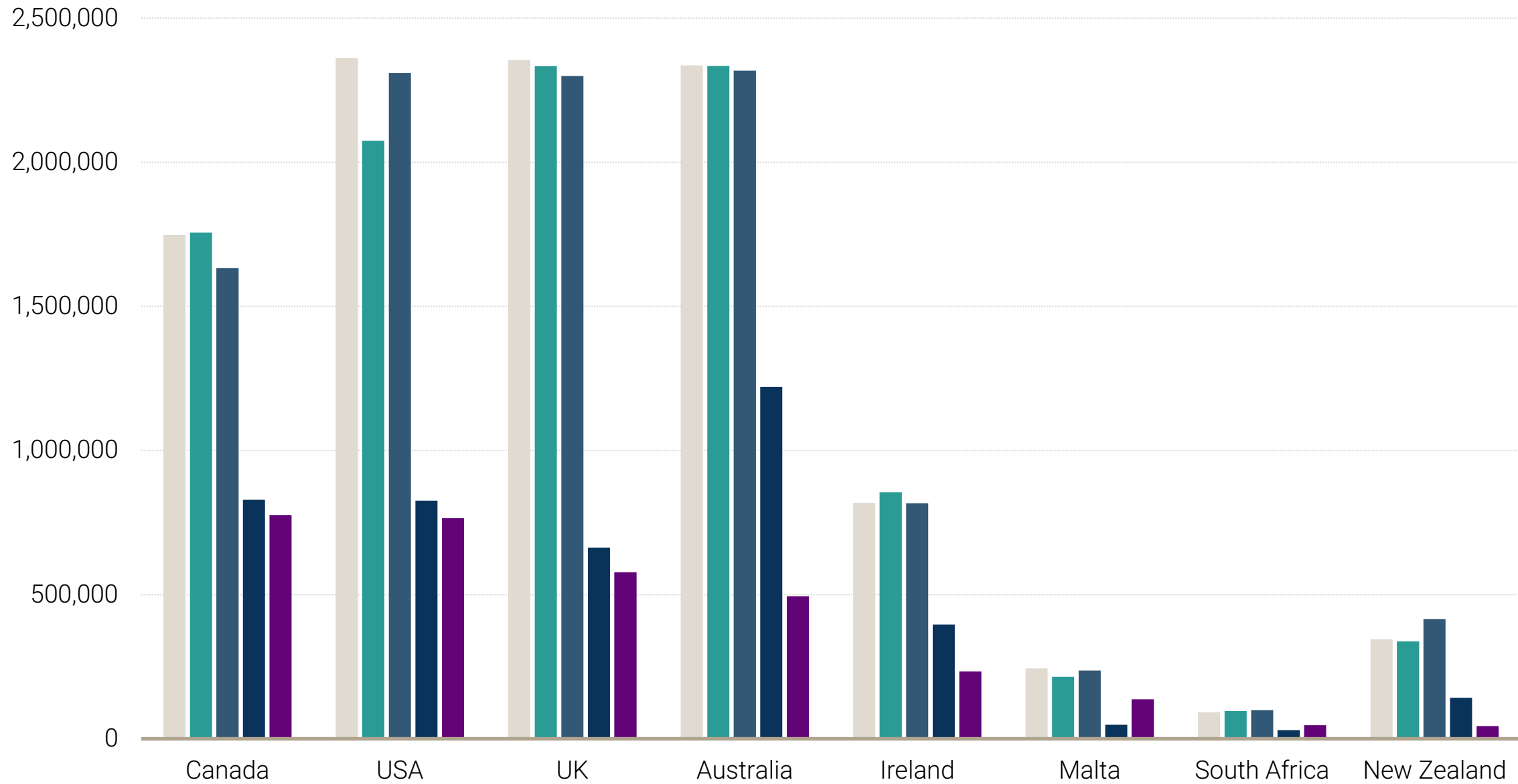
12% in 2019

Source: BONARD, 2022; Institute of International Education, 2022; SEVIS, 2022; English Australia, 2022; English UK, 2022; Languages Canada, 2022; Marketing English in Ireland, 2022; National Statistics Office Malta, 2022; EduSA, 2022

Global ELT Market: Top Destinations

STUDENT WEEKS BY DESTINATION

2017 2018 2019 2020 2021



25%

of student weeks globally were spent in Canada in 2021

vs

16%

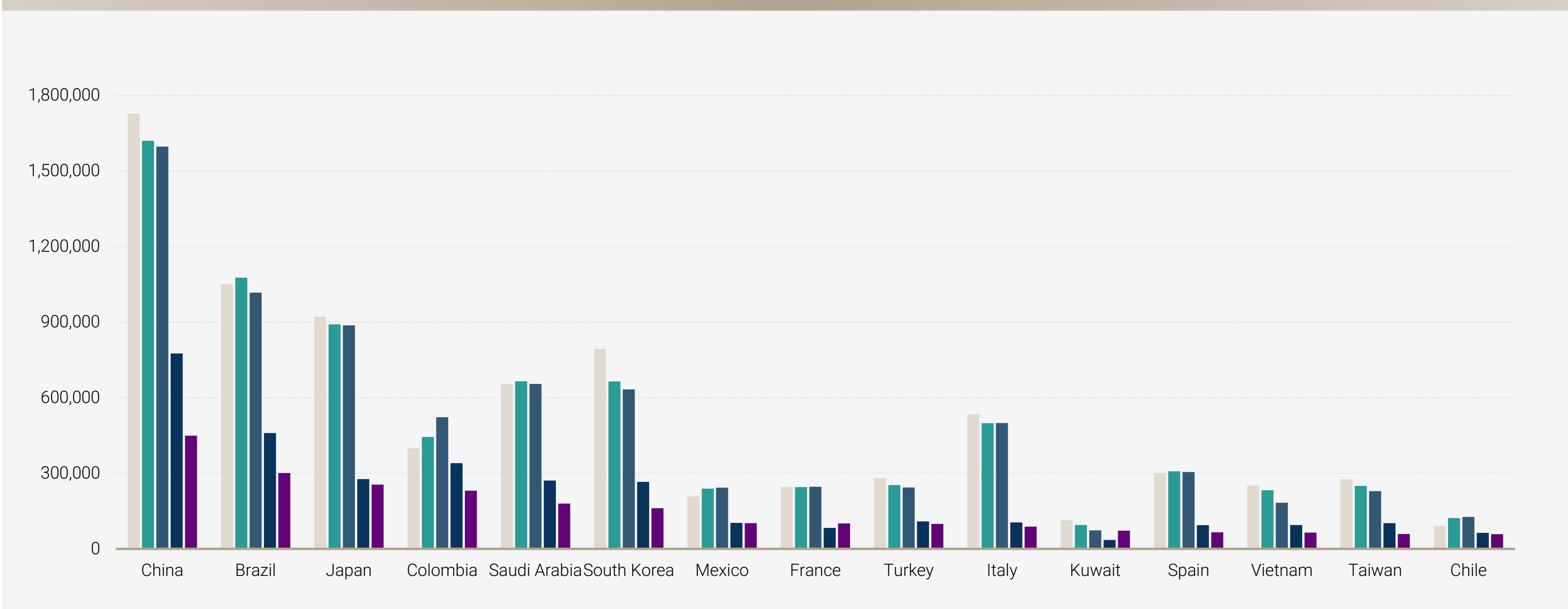
 in 2019

Source: BONARD, 2022; Institute of International Education, 2022; SEVIS, 2022; English Australia, 2022; English UK, 2022; Languages Canada, 2022; Marketing English in Ireland, 2022; National Statistics Office Malta, 2022; EduSA, 2022

Global ELT Market: Top Source Markets

STUDENT WEEKS BY SOURCE MARKET

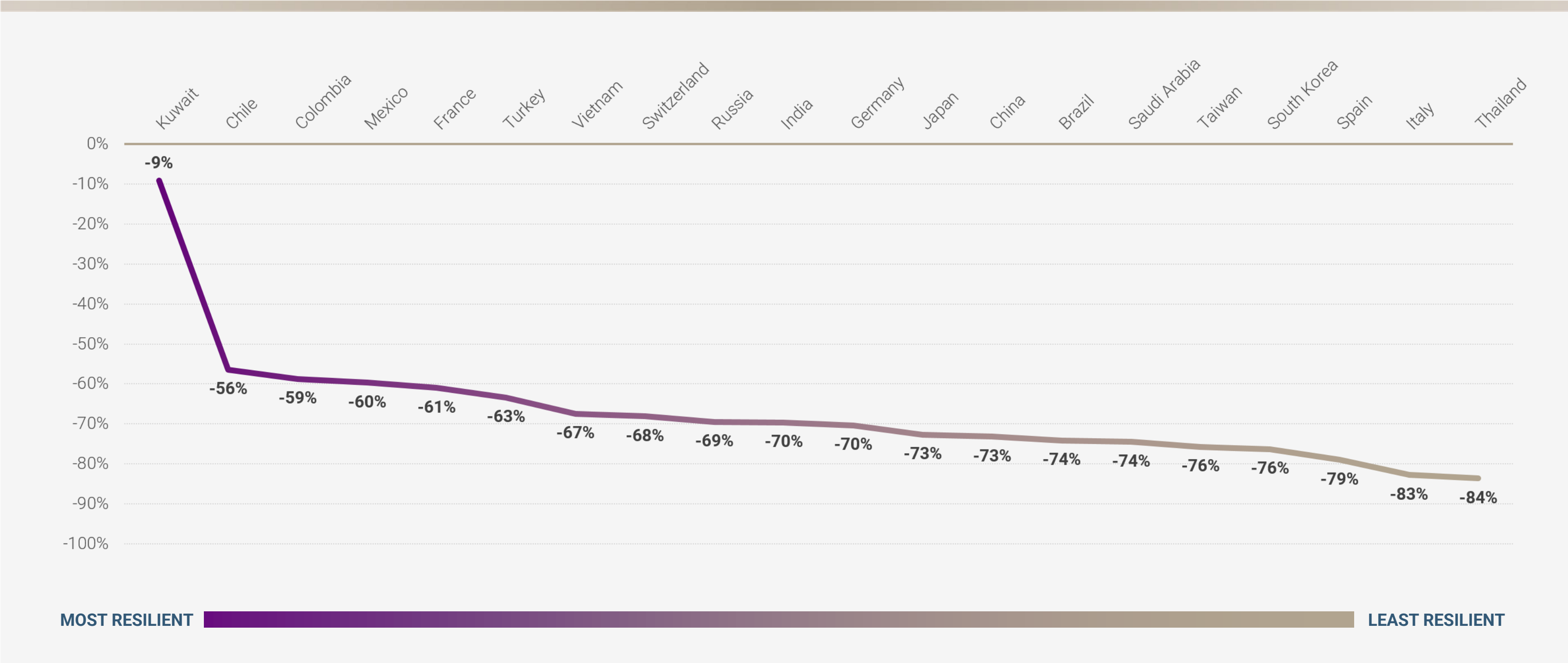
2017 2018 2019 2020 2021



Source: BONARD, 2022

Global ELT Market: Top Source Markets

2021 V 2019 PERFORMANCE OF TOP 20 MARKETS GLOBALLY (STUDENT WEEKS)

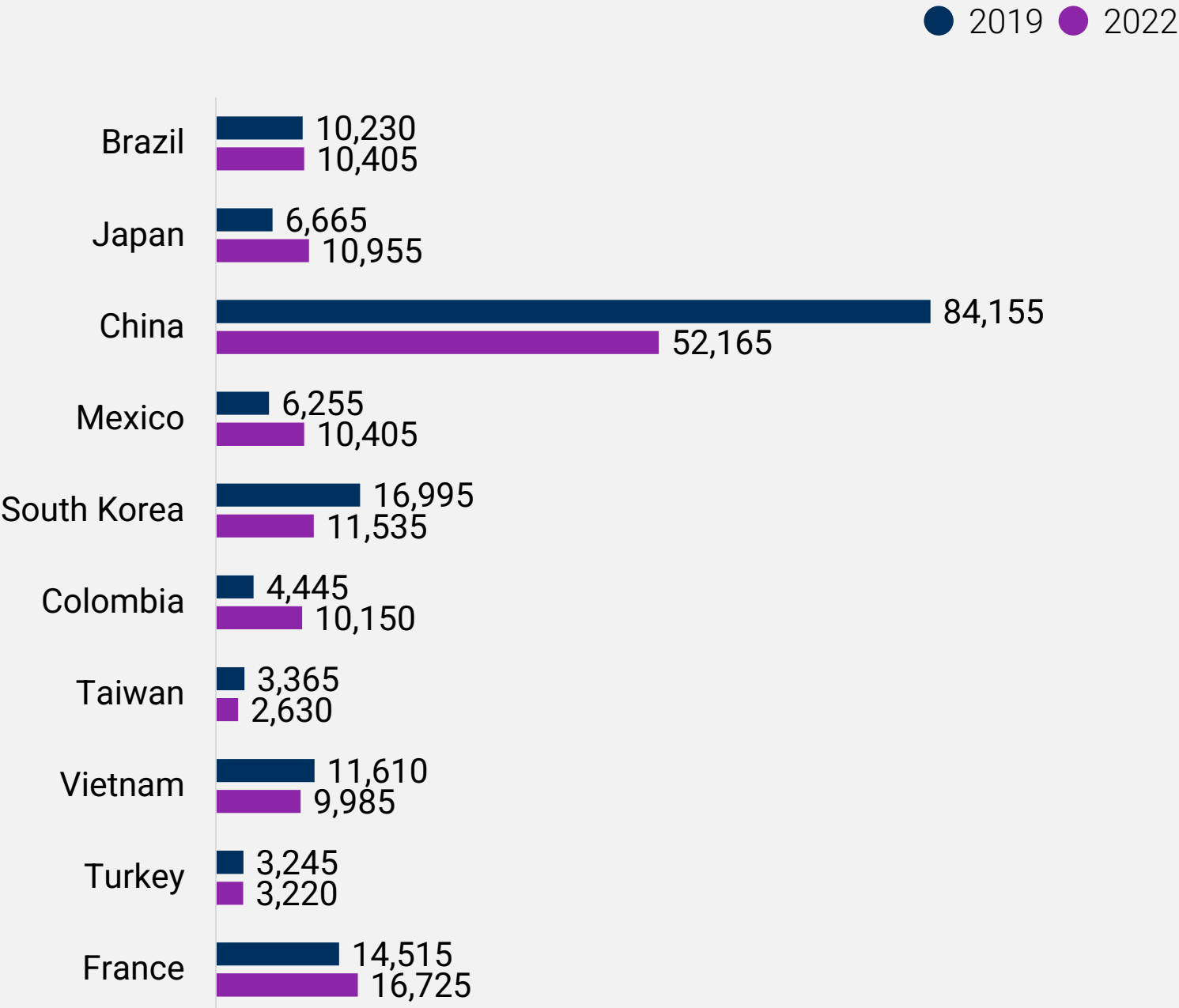


Source: BONARD, 2022

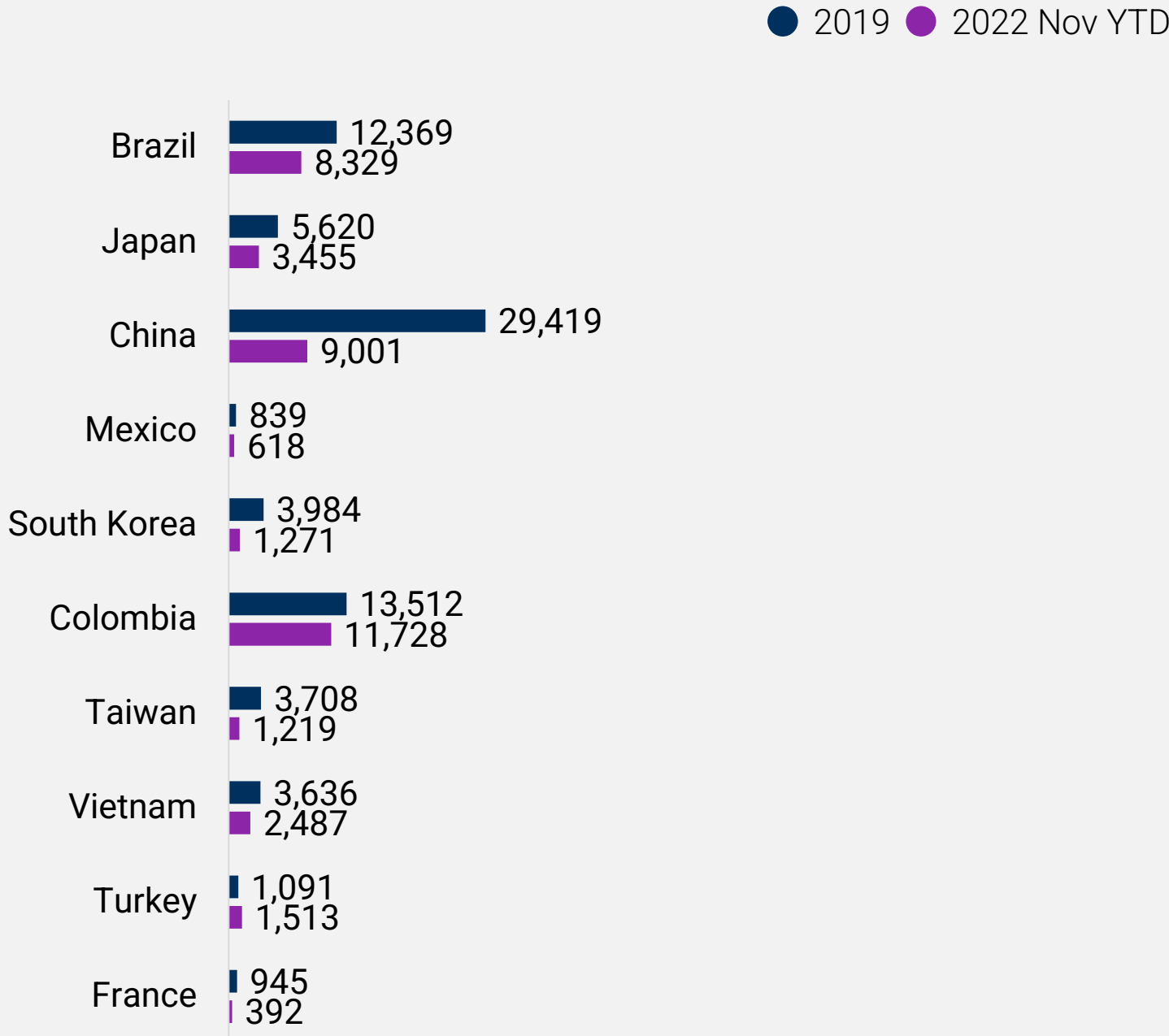
Top 10 Source Markets: Comparison

2022 V 2019 PERFORMANCE OF TOP 10 MARKETS FOR LC MEMBERS (RANK AS OF 2019)

CANADA (STUDY PERMIT HOLDERS)



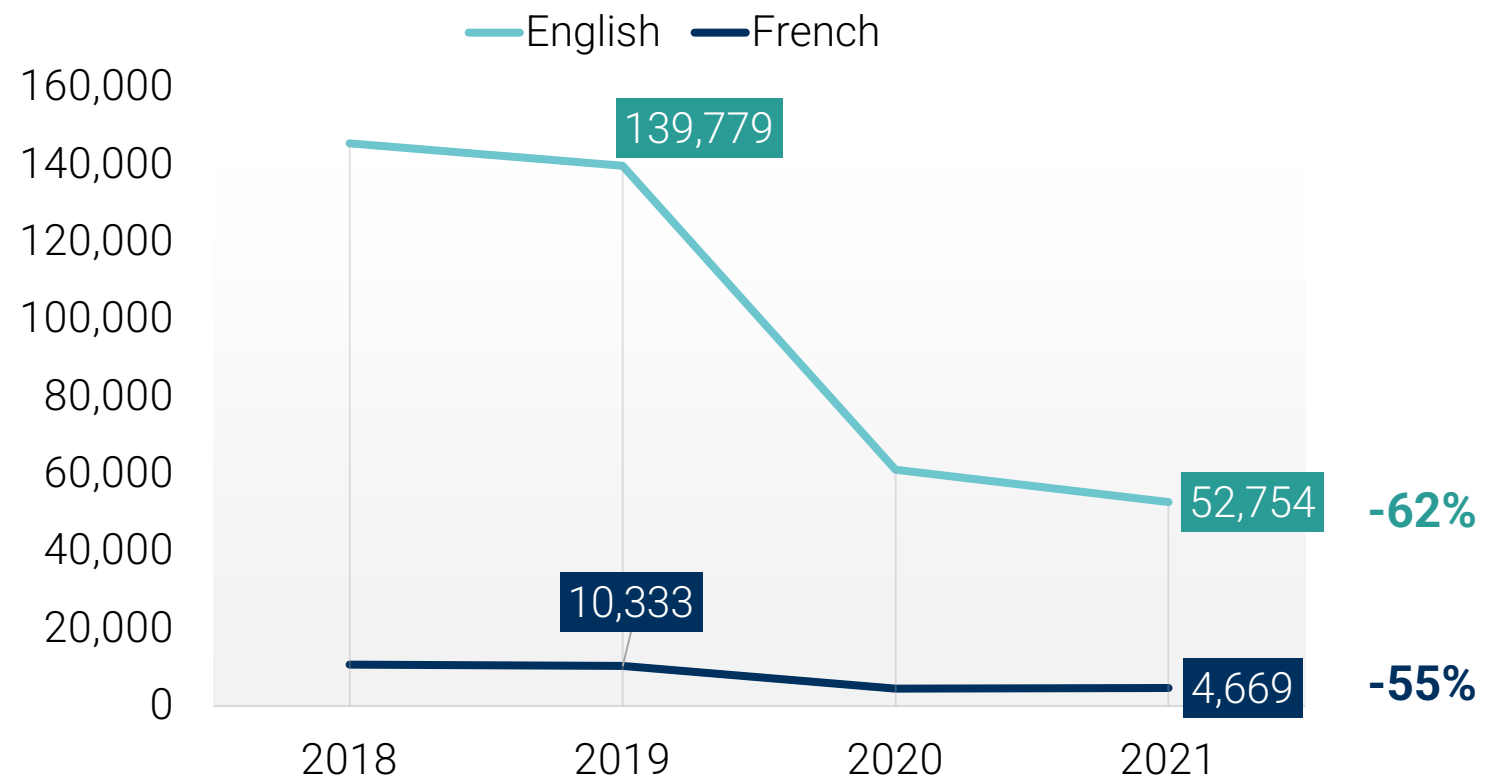
AUSTRALIA (STUDENT VISA HOLDERS – COMMENCEMENTS)



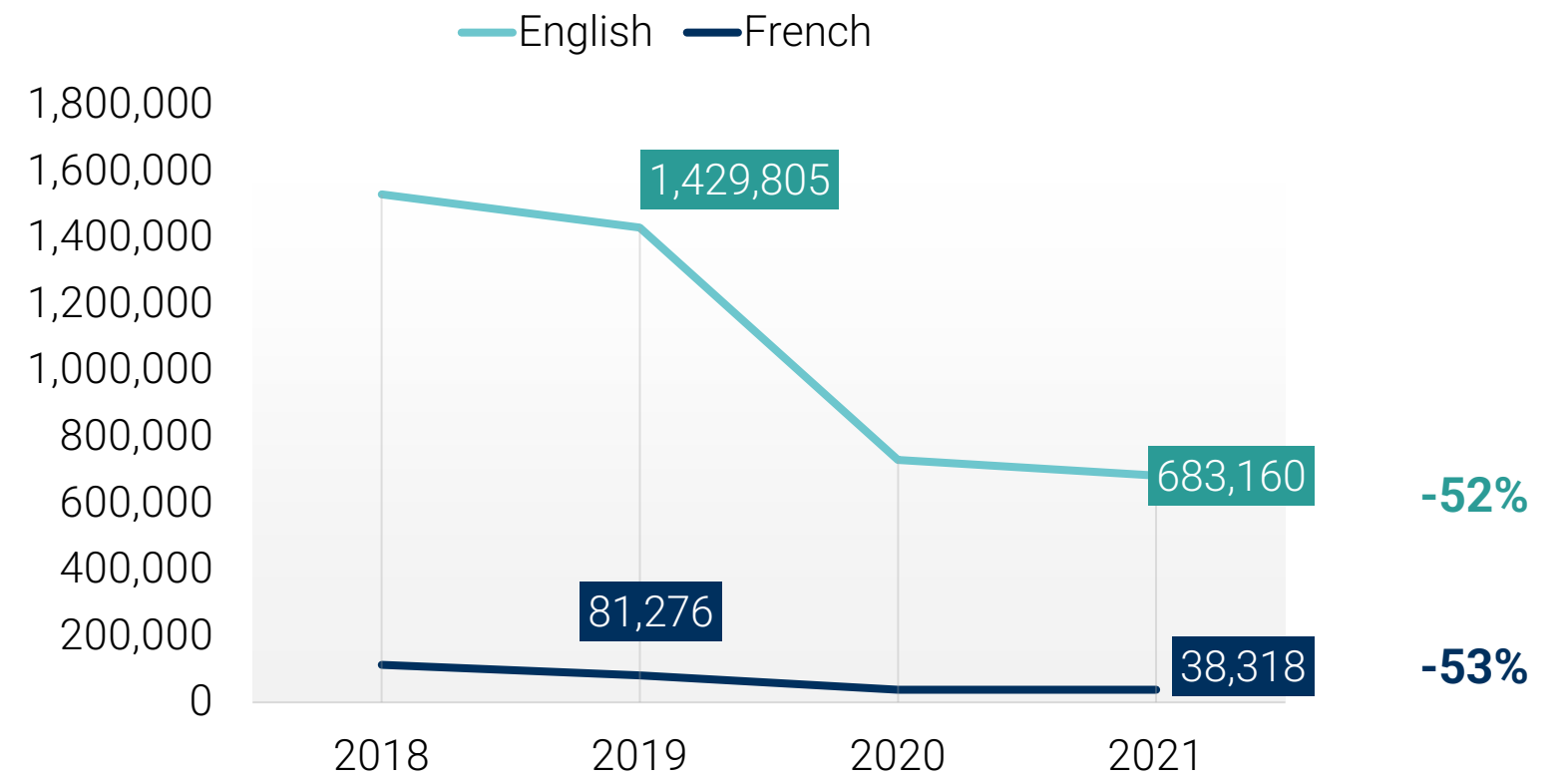
Source: IRCC, 2022; DESE 2022

Canada: ELT and FLT Performance

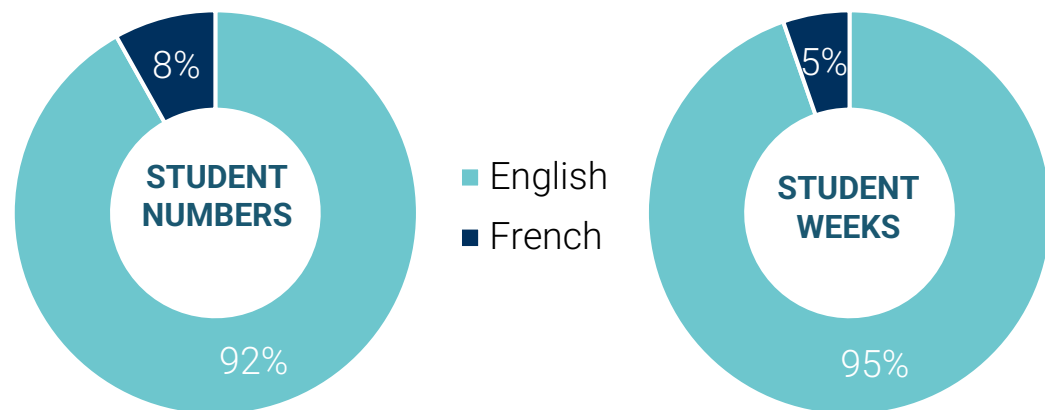
STUDENT NUMBERS



STUDENT WEEKS



SHARE (2021)

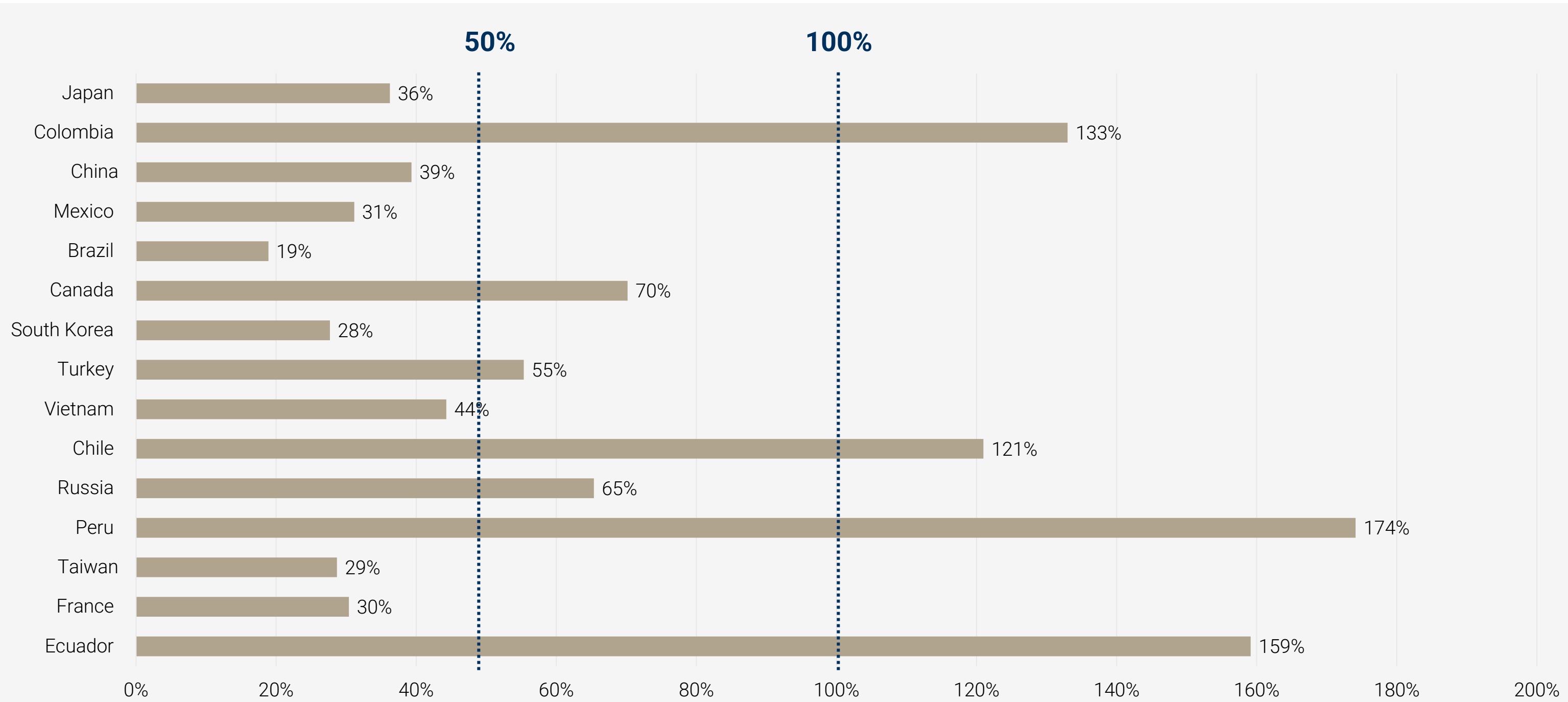


AVERAGE COURSE DURATION (2021)



Canada: Top 15 Source Markets

RECOVERY LEVELS (2021 VS 2019)



Source: Languages Canada, 2021

Canada: 2023 Trends



Shifting preferences towards other study destinations (Australia reopening and an rise of alternative study destinations e.g. Philippines, Dubai)



Pricing & Inflation



Visa processing



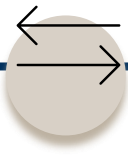
Post-Graduation work permit/opportunity



Lifting the limit on off-campus work hours for international students to help address labour shortages in the country.



Return of Chinese students



Shifts in source markets (emerging markets, saturated markets, growing markets)

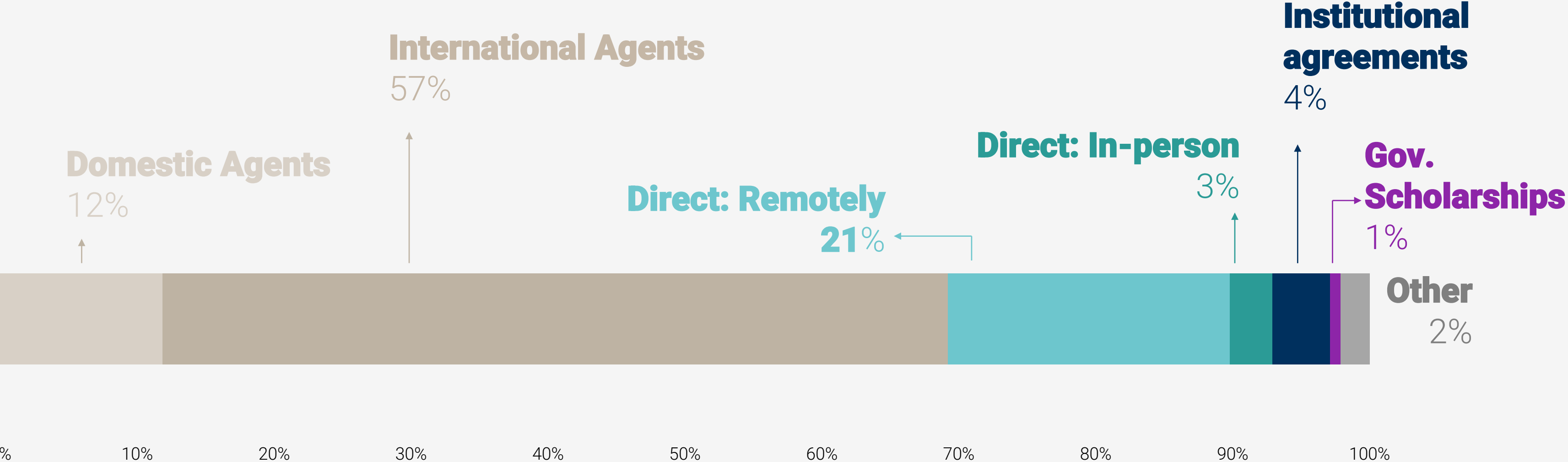


Future of Online delivery vs students returning to study face-to-face



Accommodation shortage

Canada: Recruitment Channels



Source: Annual Report on Language Education in Canada, 2021

International Student Recruitment: Selection Process



- Key performance data: source markets - student numbers and student weeks broken down by respective nationality



CANADA

Annual Report on Language Education in Canada

Student numbers by source country

	Private	Public	Total
Japan	5,549	865	6,414
Colombia	5,777	470	6,247
China	2,657	3,373	6,030
Mexico	4,266	395	4,661
Brazil	4,207	119	4,326
Canada	1,215	2,759	3,974
South Korea	3,066	410	3,476
Turkey	1,497	211	1,708
Vietnam	988	361	1,349
Chile	1,063	61	1,124
Russia	1,050	28	1,078
Peru	995	41	1,036
Taiwan	871	65	936
France	856	27	883
Ecuador	813	32	845
Iran	579	238	817
Rest of Africa	331	289	620
Rest of the Middle East	322	264	586
India	366	155	521
Rest of Central America	439	68	507
Thailand	451	13	464
Rest of Asia	347	110	457
Hong Kong	294	129	423
Ukraine	360	38	398
Germany	355	9	364
Switzerland	351	3	354



AUSTRALIA

National ELICOS Market Report

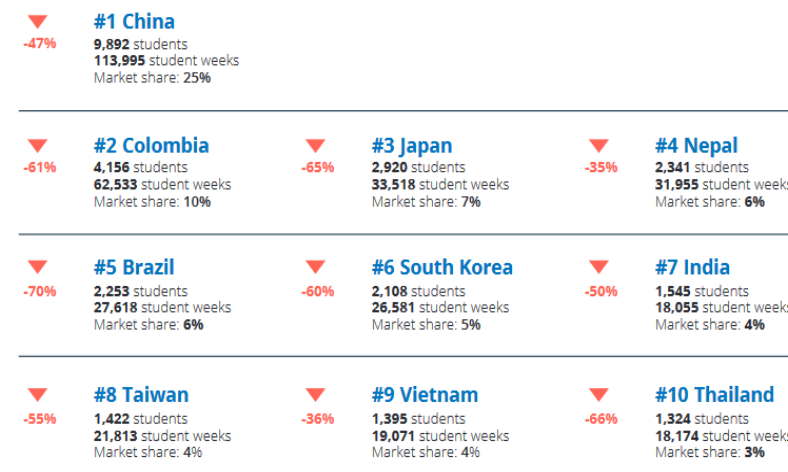


Fig 20. Top growing markets (student numbers)

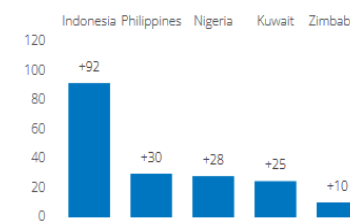
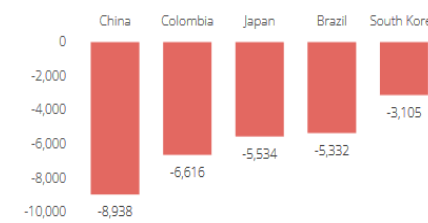


Fig 21. Top declining markets (student numbers)



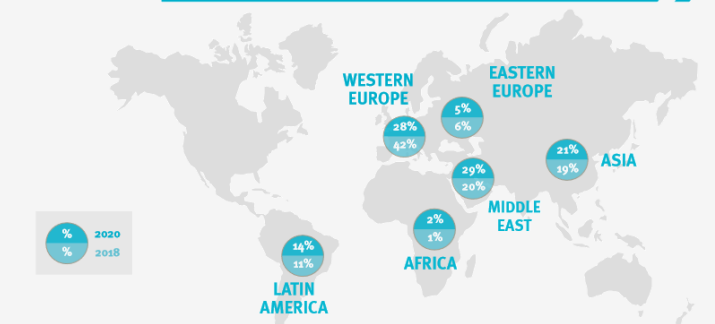
Executive summary available [here](#)



UK

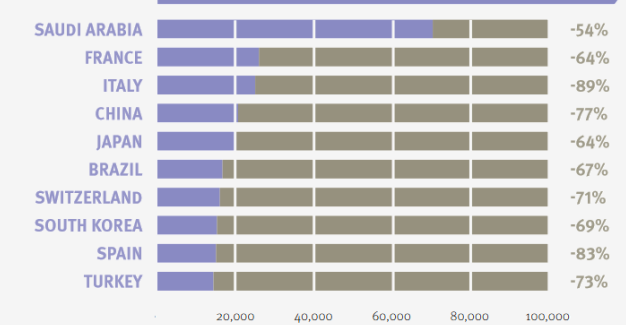
Student Statistics Market Report

SOURCE REGIONS PERCENTAGE OF TOTAL STUDENT WEEKS



Source: English UK, 2020; a comparison of 2018 and 2020 figures does not reflect fluctuation in English UK private sector membership, 2020 n=291 and 2018 n=338 member centres

TOP SOURCE MARKETS STUDENT WEEKS & YEAR-ON-YEAR CHANGE



Executive summary available [here](#)

Recruitment: Selection Process



- Key performance data - Source markets: student numbers and student weeks broken down by respective nationality



CANADA
IRCC – Study Permit Holders



AUSTRALIA
DESE – International Students in Australia



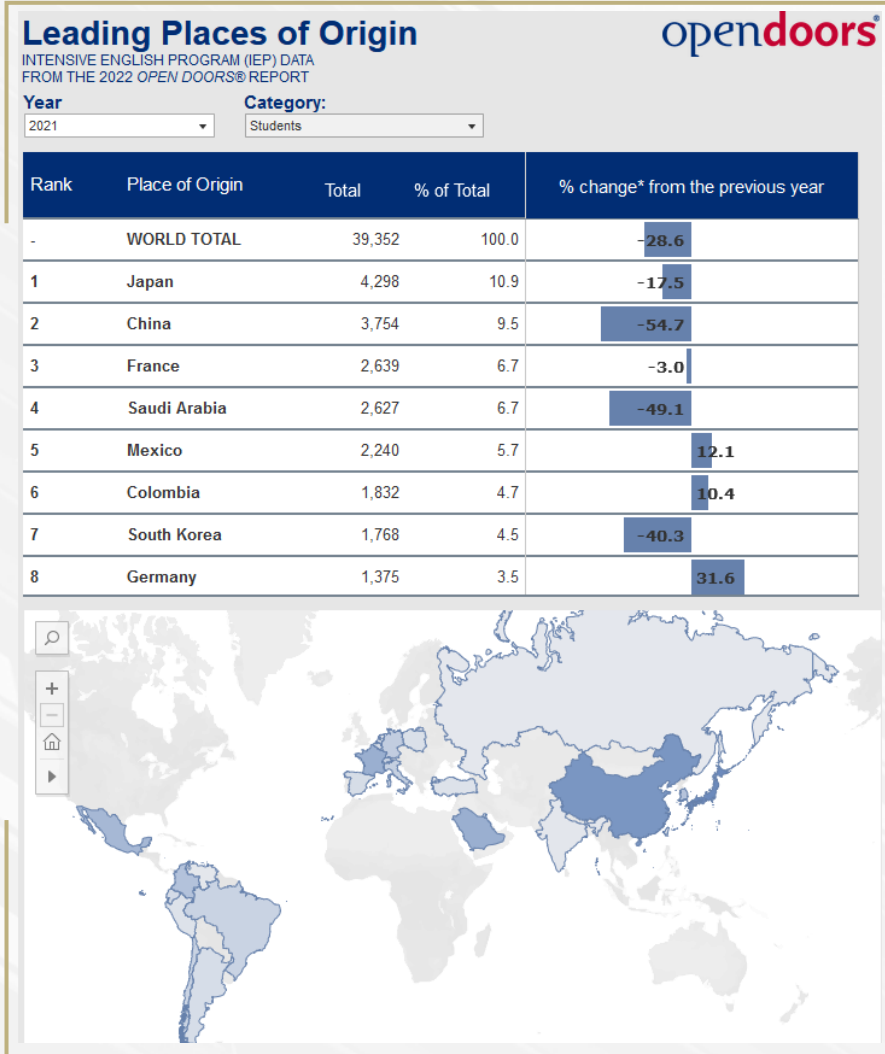
USA
Open Doors – Intensive English Programs

Country of Citizenship	2015 Total	2016 Total	2017 Total	2018 Total	2019 Total	2020 Total	2021 Total	2022 Total
Colombia	1,295	1,675	2,375	3,275	4,445	3,010	6,845	10,150
Brazil	6,350	7,295	8,865	10,245	10,230	6,040	8,545	10,405
Mexico	4,225	4,905	5,440	5,750	6,255	3,650	9,710	10,405
Japan	6,040	6,685	6,530	6,680	6,665	3,485	7,605	10,955
Korea, Republic of	14,735	15,935	16,700	16,860	16,995	10,930	10,600	11,535
Nigeria	6,325	6,160	5,945	6,505	7,505	5,840	9,530	16,195
France	11,860	11,825	13,220	13,415	14,515	7,935	20,020	16,725
India	31,920	52,625	82,935	107,020	138,615	80,885	169,460	226,450
Philippines	1,880	2,895	2,750	4,070	6,330	4,360	14,365	25,380
China, People's Republic of	65,860	76,840	82,690	84,980	84,155	57,760	55,900	52,165
Hong Kong SAR	2,095	2,355	2,440	2,440	2,490	2,605	6,340	9,580
Vietnam	2,830	5,320	9,865	12,350	11,610	9,360	9,240	9,985
Guinea, Republic of	175	290	280	355	460	330	740	1,200
Russia	1,510	1,495	1,440	1,430	1,550	1,030	1,660	1,270
Kenya	430	670	790	1,010	1,065	815	1,190	1,320
Lebanon	405	475	490	515	570	535	1,320	1,335
Chile	345	430	465	540	545	435	1,370	1,410

Data available [here](#)

Month	Nov							
State	(All)							
Sector	ELICOS							
	Data	Year	↓↑					
	Sum of DATA YTD Enrolments			Sum of DATA YTD Commencements				
Nationality	2019	2020	2021	2022	2019	2020	2021	2022
Colombia	16,829	14,983	5,129	12,206	12,704	9,958	3,222	11,728
Thailand	8,700	6,200	1,507	9,719	6,292	3,444	940	9,566
China	41,717	24,932	12,274	11,182	29,067	14,949	8,236	9,001
Brazil	15,689	10,046	2,549	8,558	11,687	6,215	1,695	8,329
Japan	7,653	4,854	1,917	3,795	5,461	2,682	1,292	3,455
Nepal	4,319	3,830	2,545	3,019	3,686	2,936	1,919	2,542
Vietnam	4,318	2,893	1,396	2,669	3,549	1,925	1,086	2,487
Chile	3,244	2,302	946	2,518	2,459	1,469	664	2,396
Spain	4,602	2,944	348	1,902	3,372	1,751	243	1,875
India	6,871	3,983	1,637	1,851	5,833	2,789	1,104	1,623
Turkey	1,336	1,130	292	1,531	994	650	190	1,513

Data available [here](#)



Data available [here](#)

Source: IRCC, Department Of Education in Australia, Open Doors, 2022

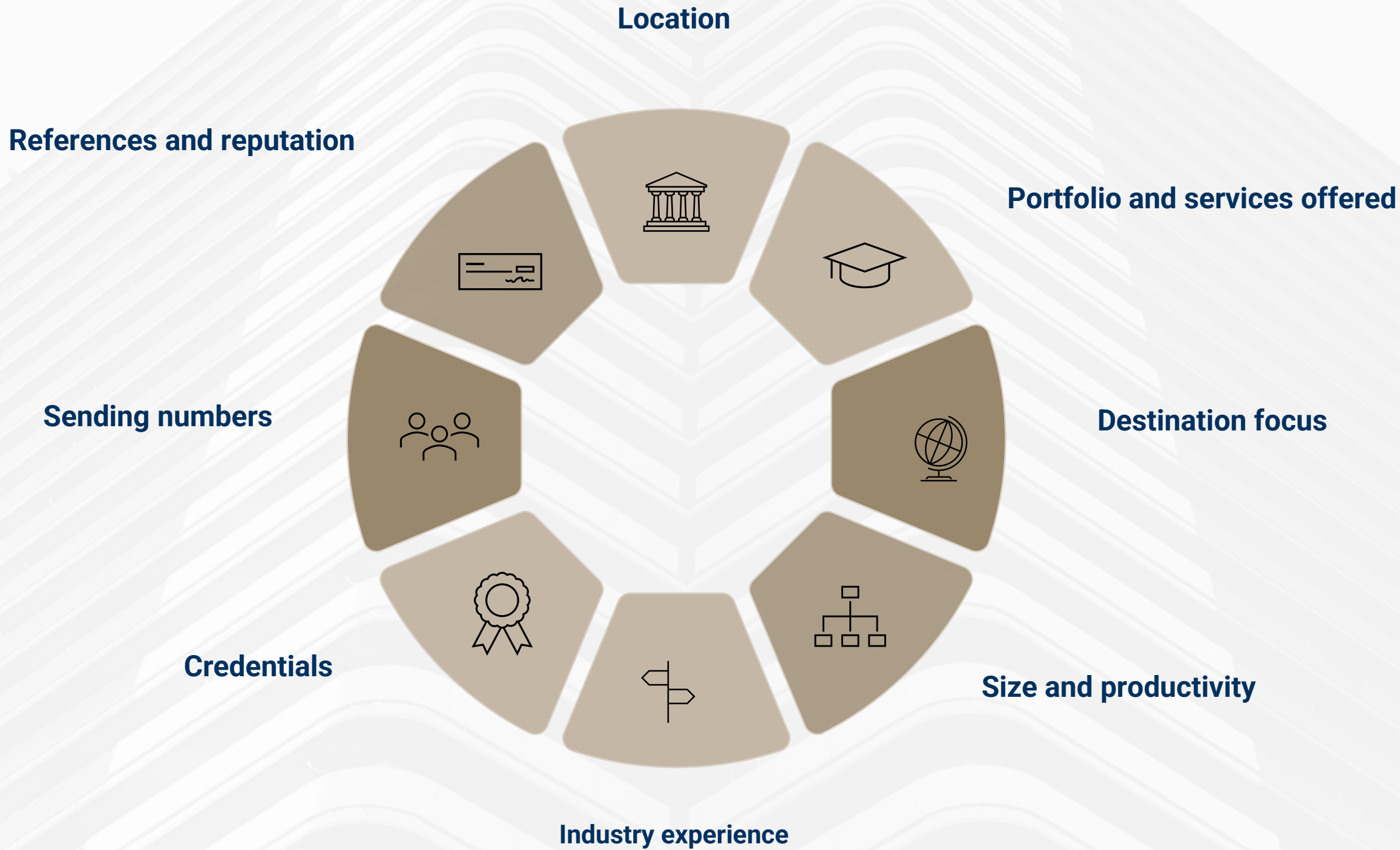
Recruitment: Selection Process



Selected domestic factors that can influence outbound mobility:



Recruitment: Agent Selection



International Student Recruitment: Inbound Trade Missions



SOLD OUT

2022 Inbound Trade Mission
Brazilian Education Agencies

Languages Canada:
Fam tour for
agencies

SOLD OUT

2022 Inbound Trade Mission with
Mexican Education Agencies

Languages Canada:
Inbound Trade Mission
Agencies



Inbound Trade Mission with
Japanese Education Agencies

REGISTER NOW!



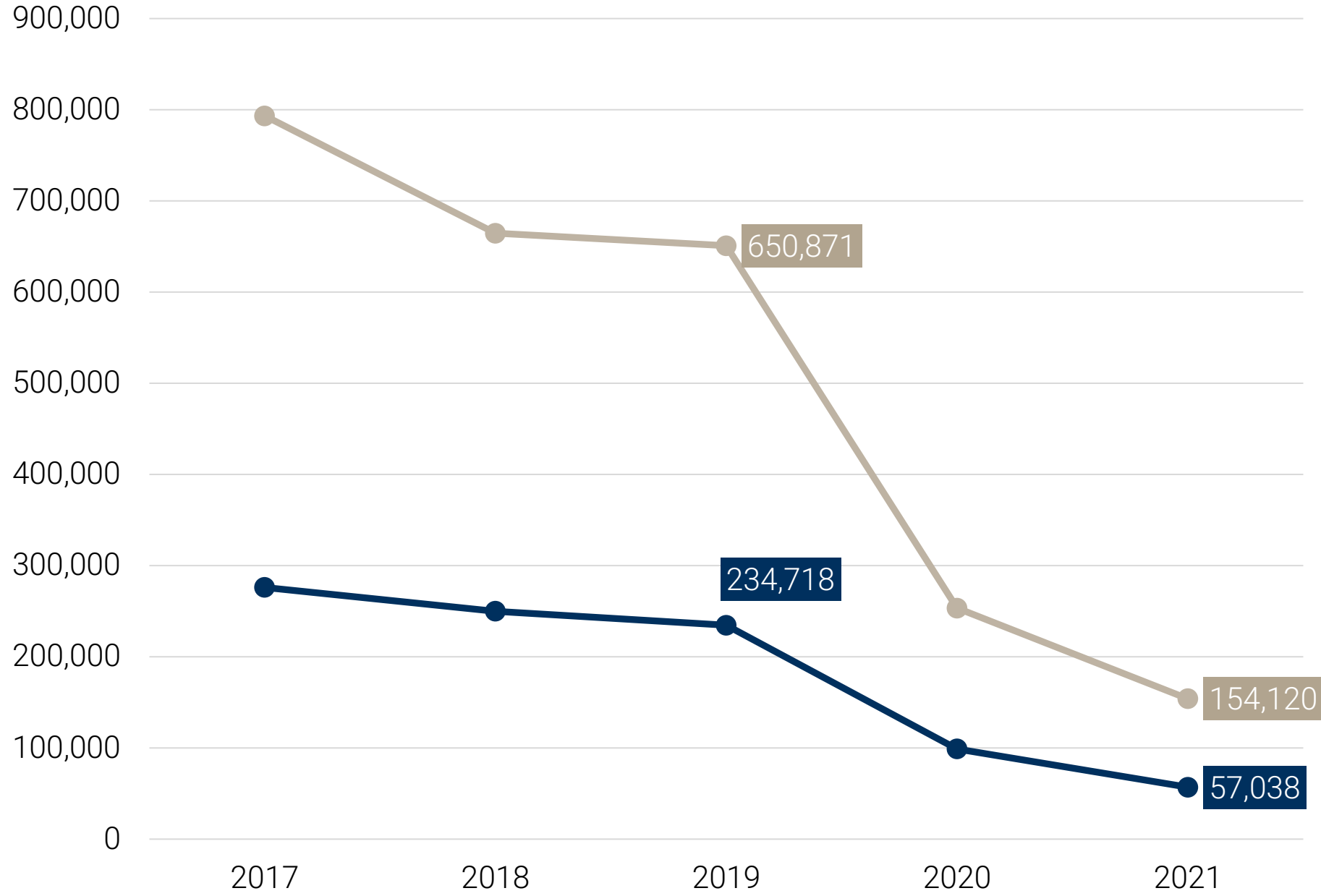
Inbound Trade Mission with
Colombian Education Agencies

Montreal, February 2023

REGISTER NOW!

ELT Selected Markets: South Korea and Taiwan

Unit: Student weeks



● South Korea
● Taiwan



34%

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

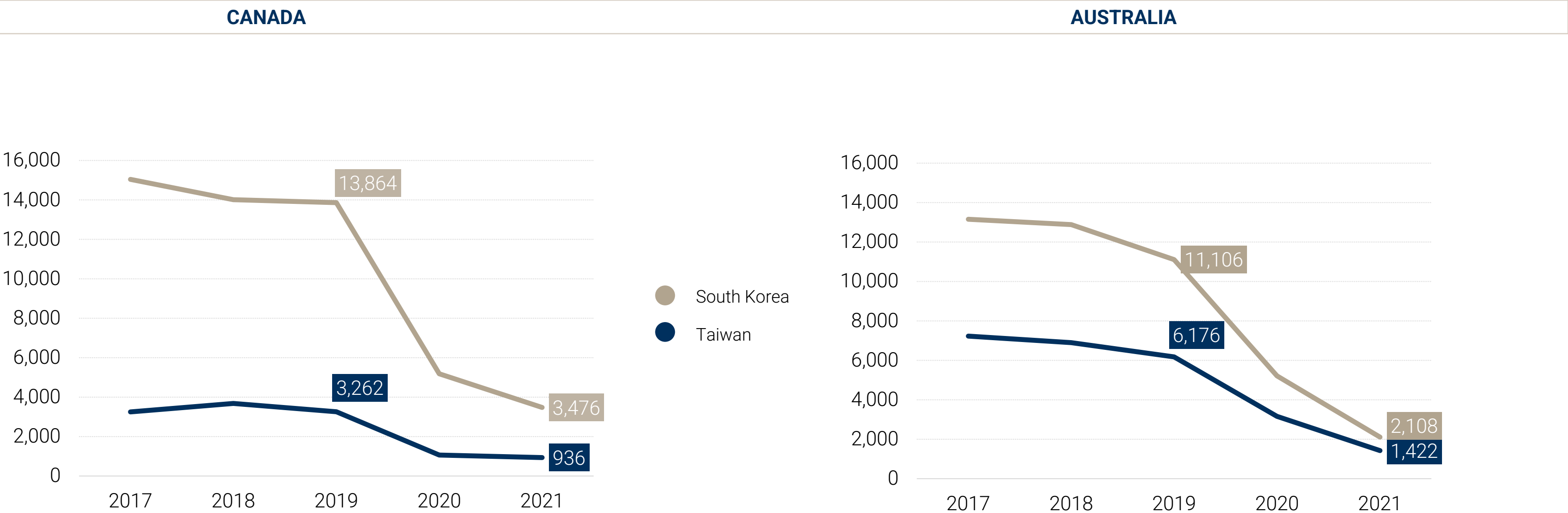
18%

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

Source: BONARD, 2021

ELT Selected Markets: South Korea and Taiwan

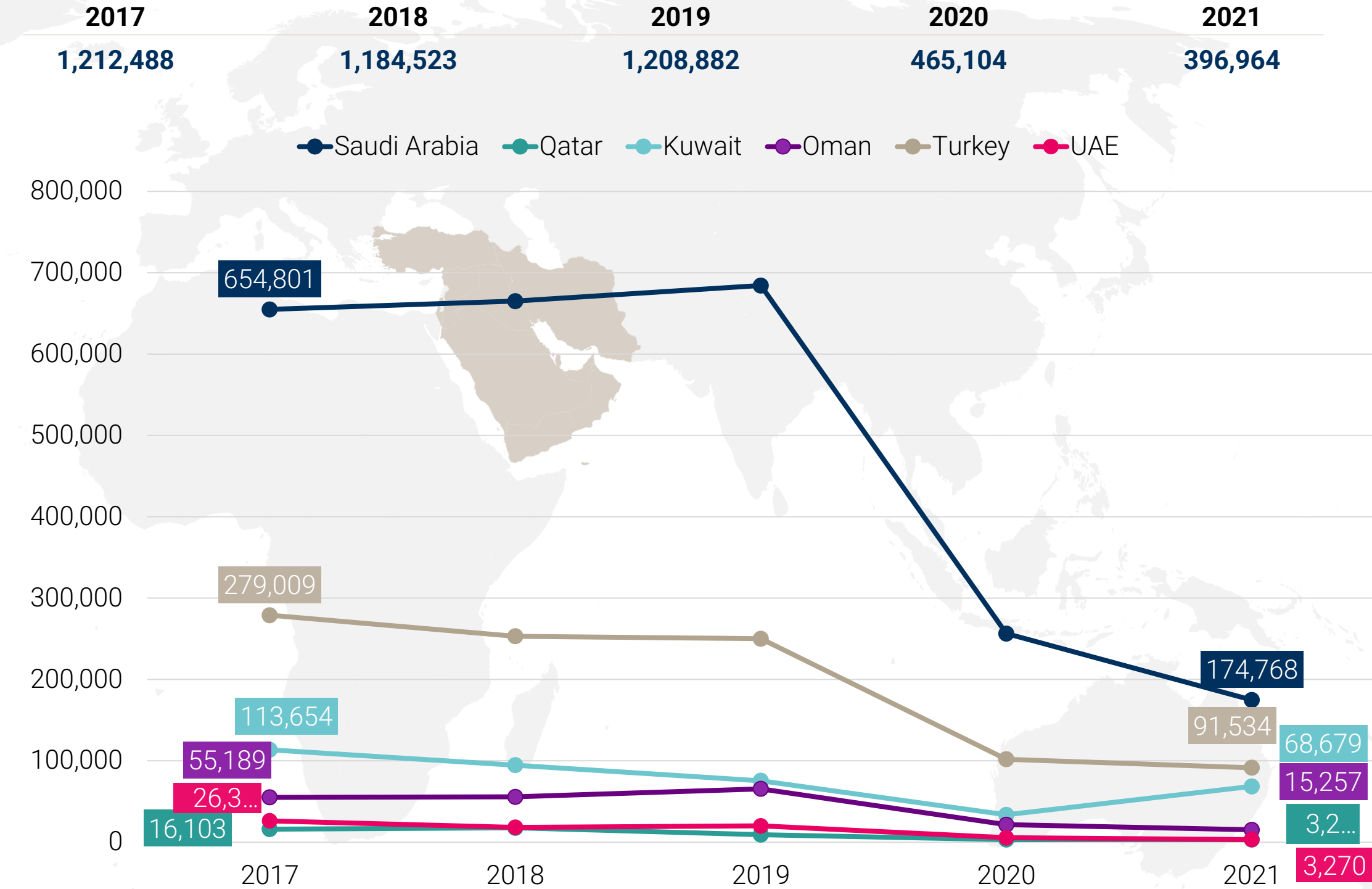
2021 V 2019 PERFORMANCE OF SELECTED MARKETS IN CANADA AND AUSTRALIA



Source: Languages Canada, English Australia, 2021

Middle East: Trends in ELT

STUDENT WEEKS DELIVERED GLOBALLY



7%

Canada's share prior to pandemic (student weeks)

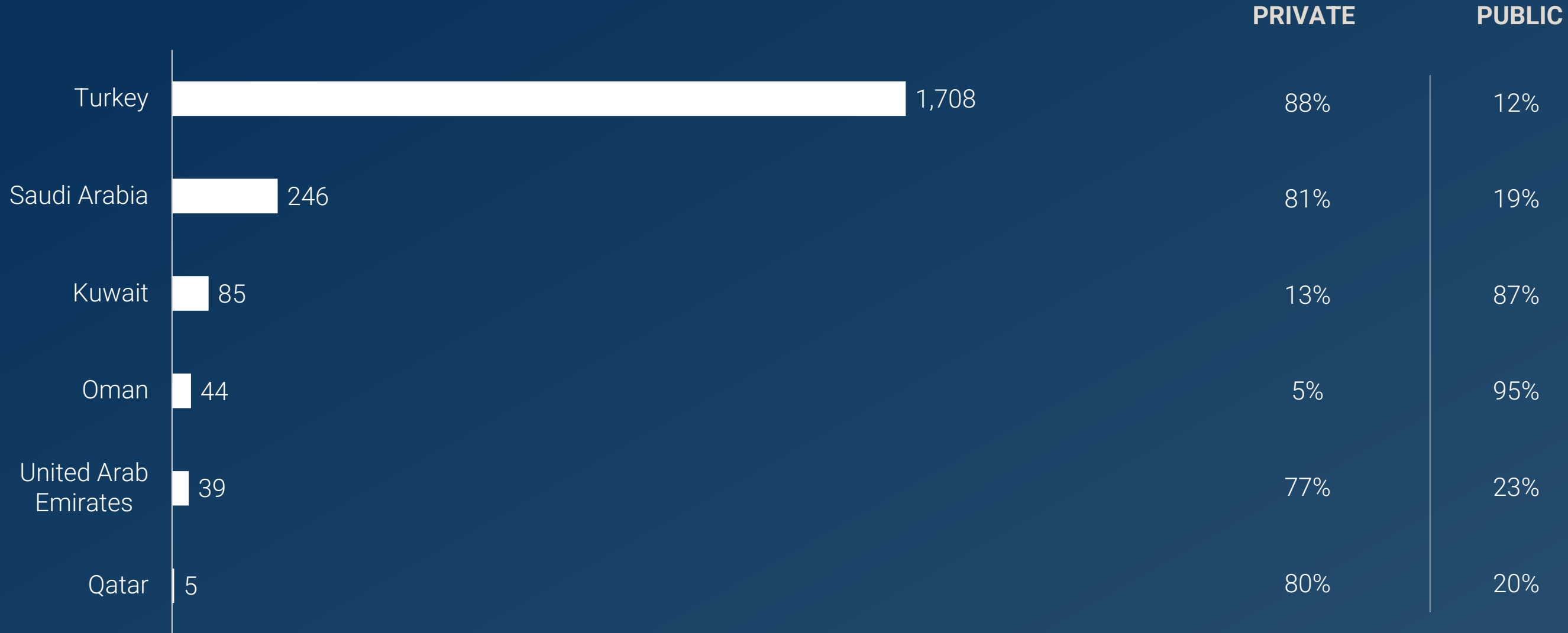
Canada's market share (2019)

- Saudi Arabia: 1%
- Qatar: 0.4%
- Kuwait: 2%
- Oman: 1%
- Turkey: 20%
- UAE: 2%

Source: BONARD, 2021

Middle East: Selected Market Performance in Canada (2021)

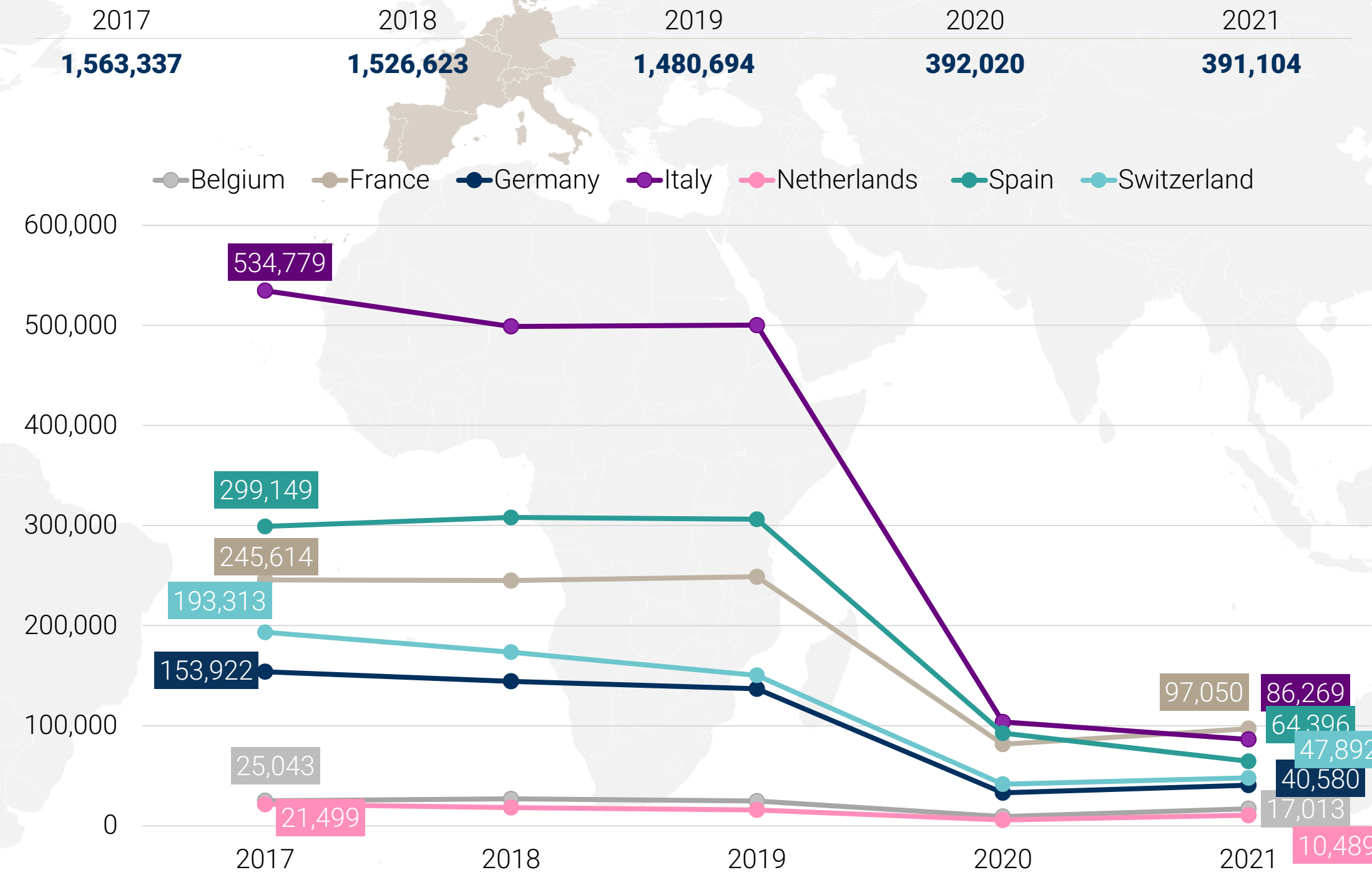
STUDENT NUMBERS



Source: Annual Report on Language Education in Canada, 2021

Western Europe: Trends in ELT

STUDENT WEEKS DELIVERED GLOBALLY



6%

Canada's share prior to pandemic (student weeks)

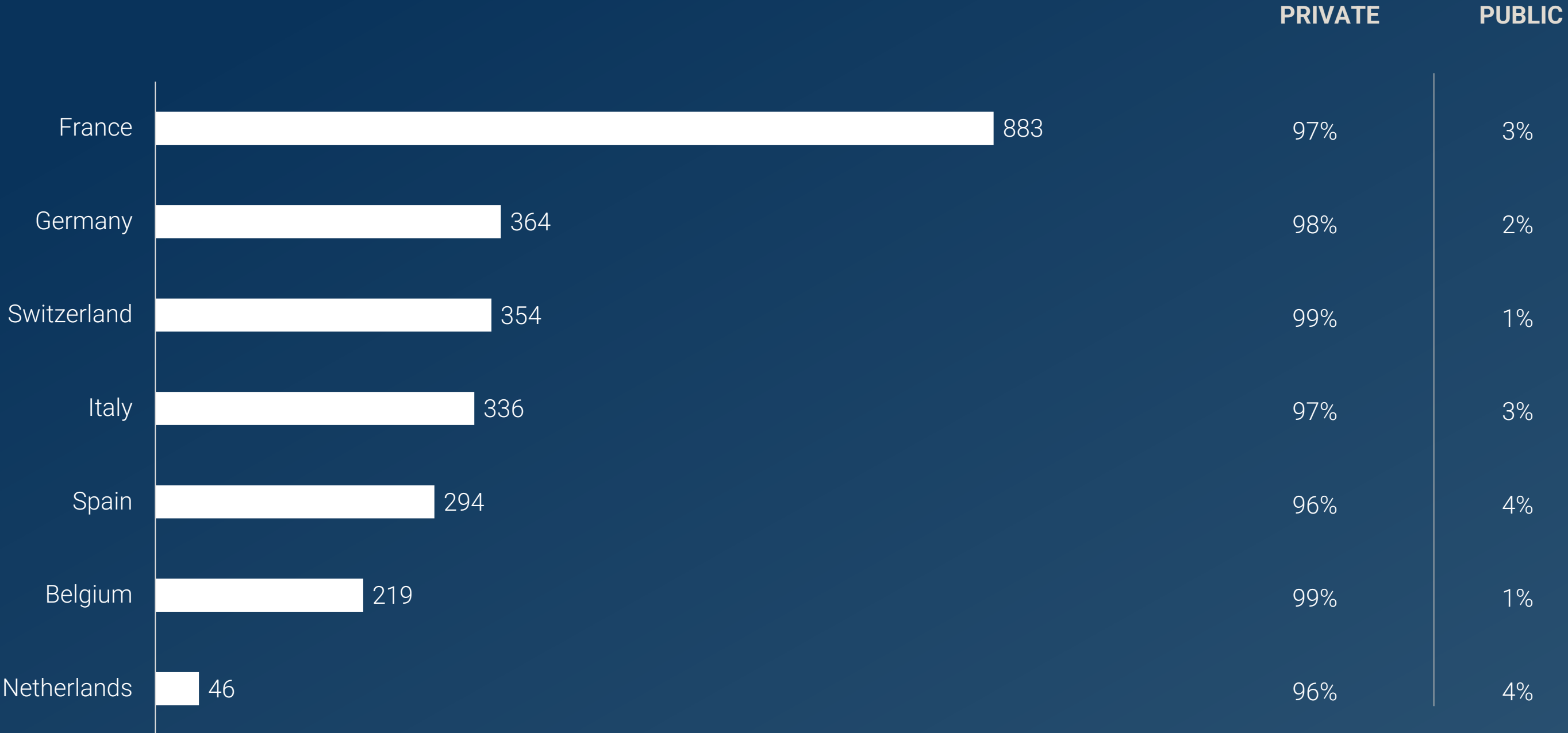
Canada's market share (2019)

- Belgium: 18%
- France: 10%
- Germany: 9%
- Italy: 2%
- Netherlands: n/a
- Spain: 4%
- Switzerland: 12%

Source: BONARD, 2021

Western Europe: Selected Market Performance in Canada (2021)

STUDENT NUMBERS



Source: Annual Report on Language Education in Canada, 2021

Market Monitor

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