

Trends Shaping the Future of Global English Language Teaching

Languages Canada Annual Conference March 1, 2023

BONARD
EDUCATION

Expertise in International Education Research



slido



Join at slido.com
#lcbonard

slido

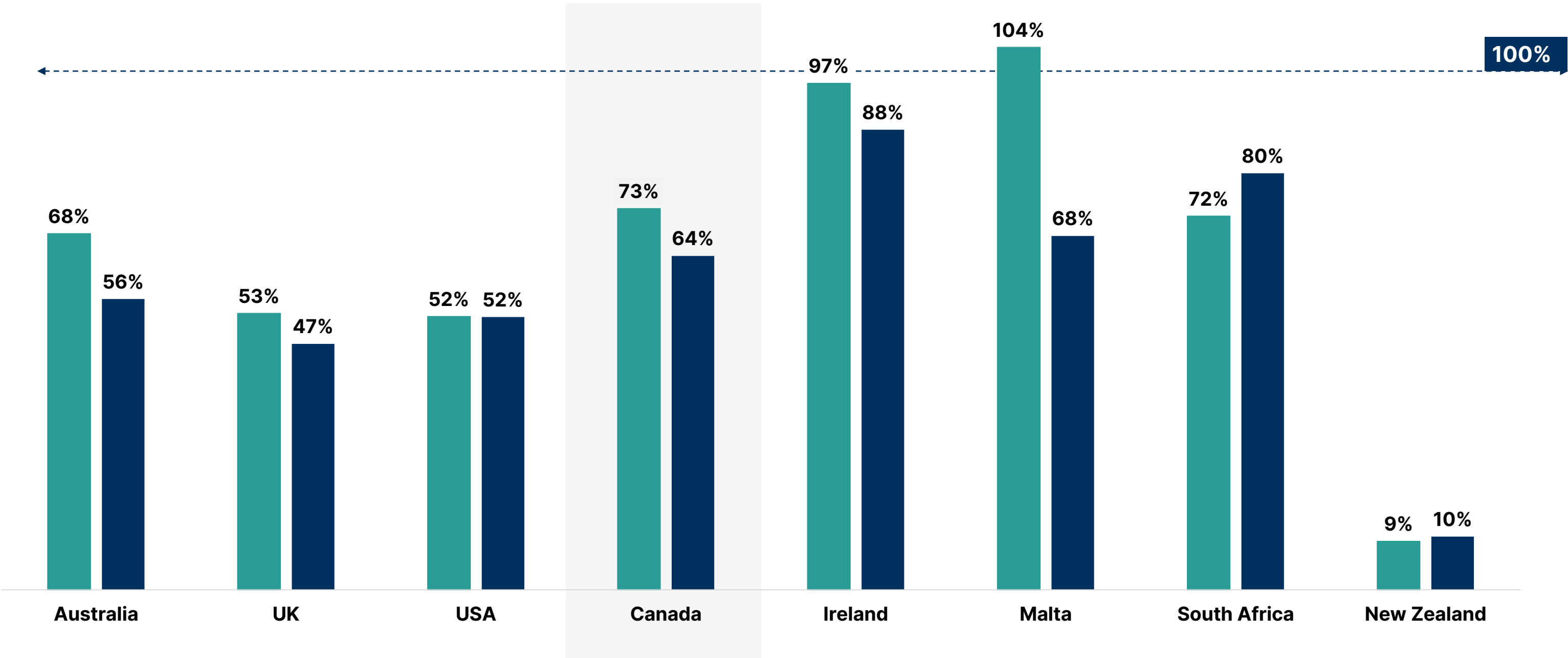


Which of the following strategies do you plan to implement looking ahead to 2024?

Global ELT Market: Recovery level by destination (2022 vs 2019)



● Student weeks ● Student numbers



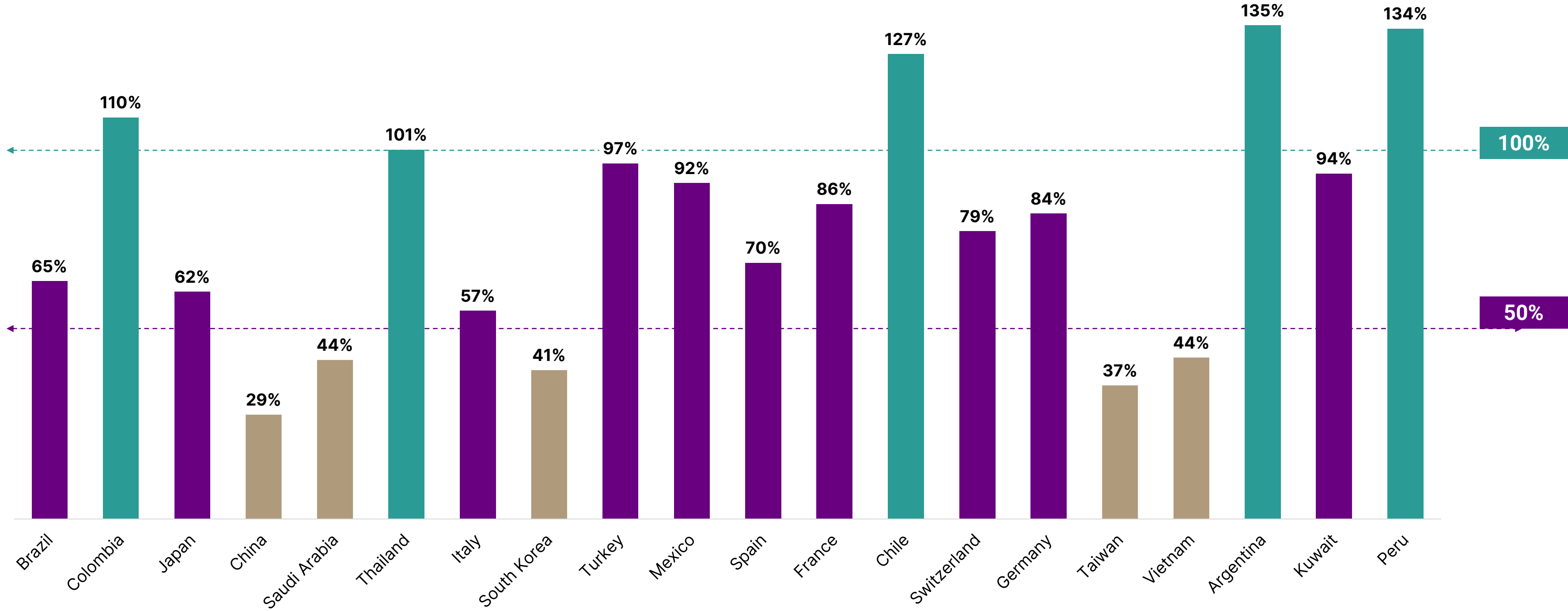
Source: BONARD, 2023

Note: Figures represent the percentage of 2022 student week volume as compared to 2019.

ELT Source Markets: Top 20 markets' recovery levels (2022 vs 2019)



STUDENT WEEKS



Source: BONARD, 2023

Note: Figures represent the percentage of 2022 student week volume as compared to 2019.

ELT Sector: Expected recovery in 2023



STUDENT NUMBERS



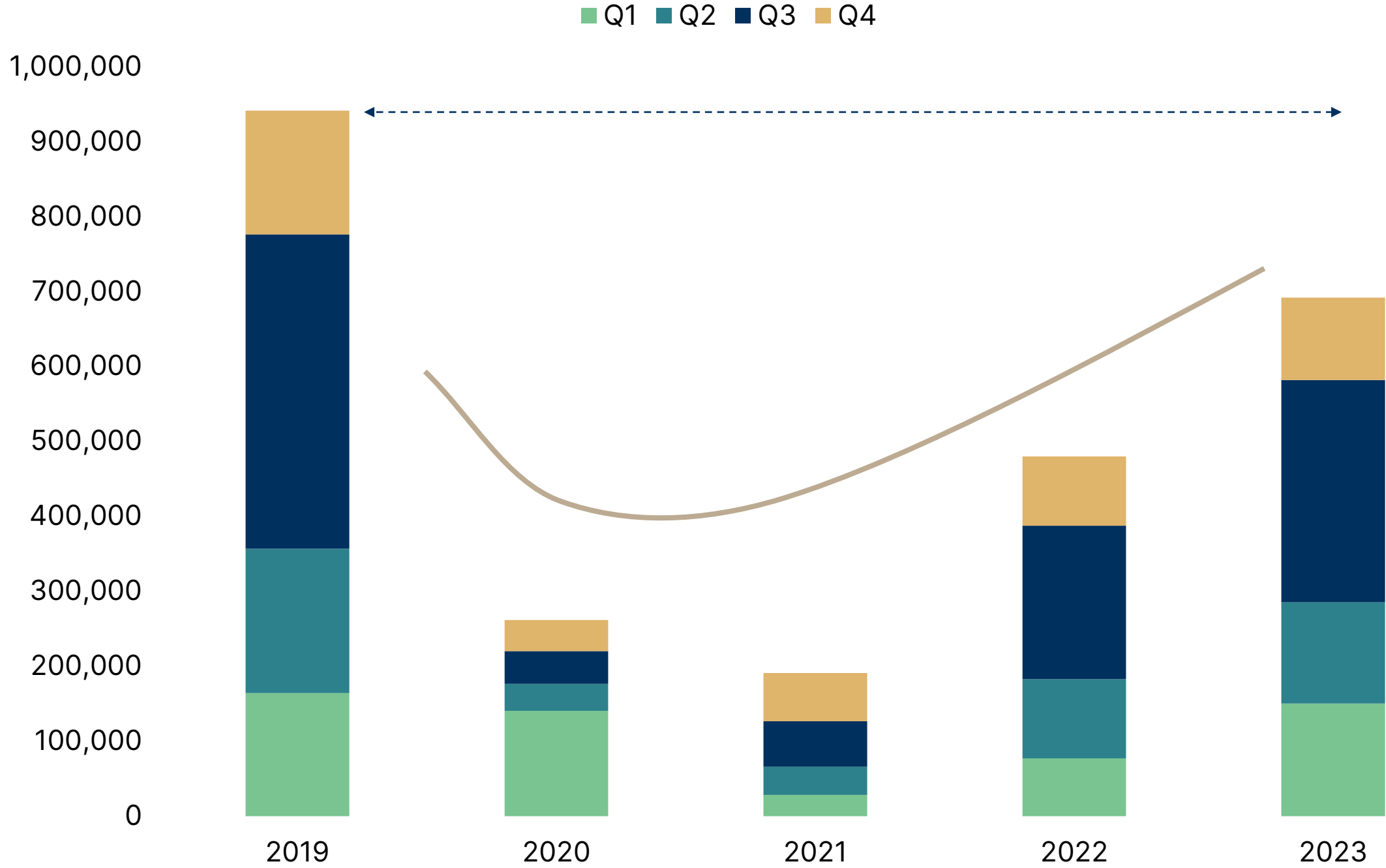
Source: BONARD, 2023

Join at [slido.com](https://www.slido.com)
[#lcbonard](https://www.slido.com/join/slido.com/#lcbonard)

UK: Q1-Q4 2023 market performance



STUDENT WEEKS



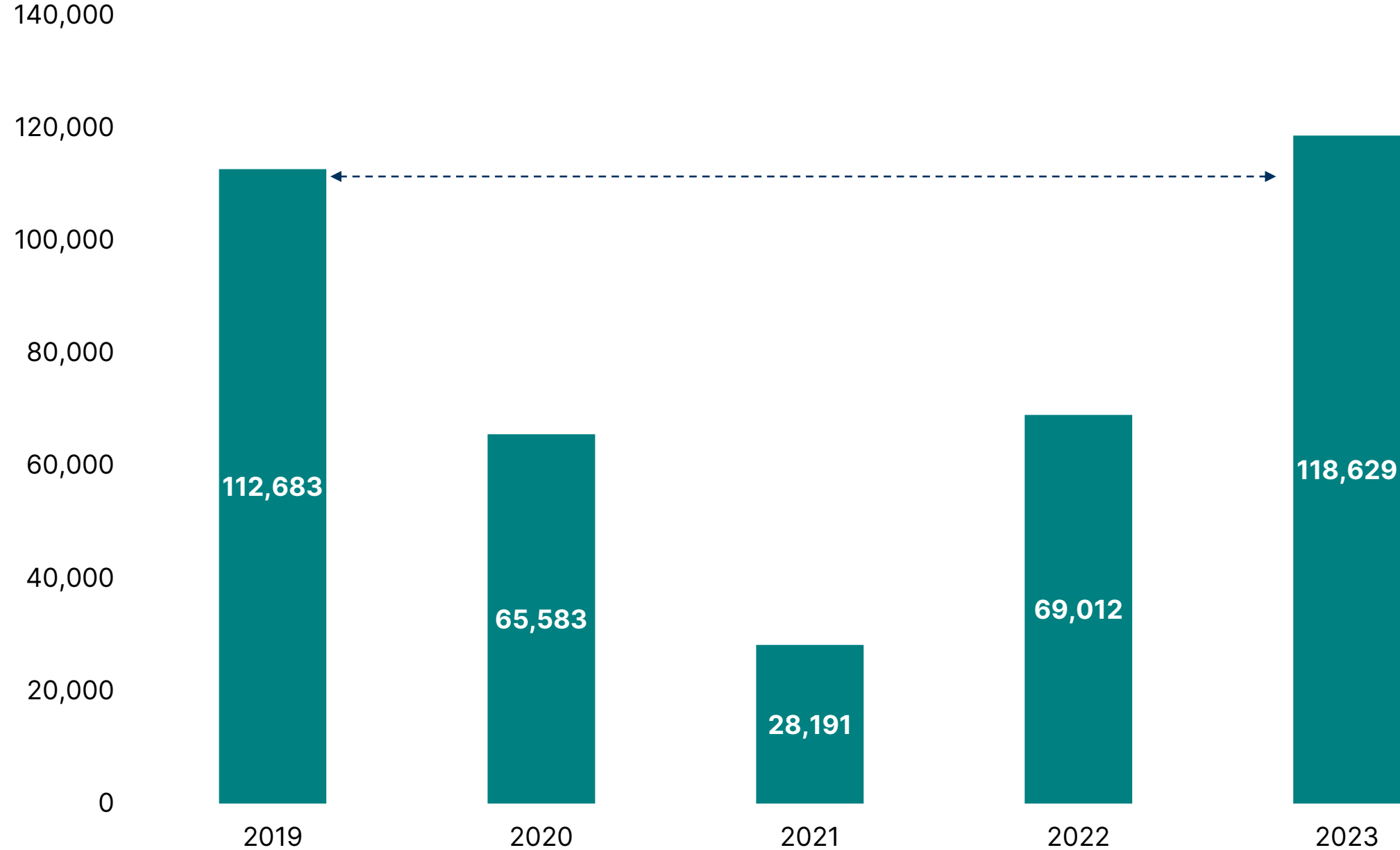
- U-shaped recovery in the UK.
- Pace of recovery slowing down.
- Reached 75% recovery (comparing YTD Dec 2023 vs YTD Dec 2019).

Source: BONARD and English UK, 2023

Australia: Market performance (YTD November)



STUDENT NUMBERS - COMMENCEMENTS



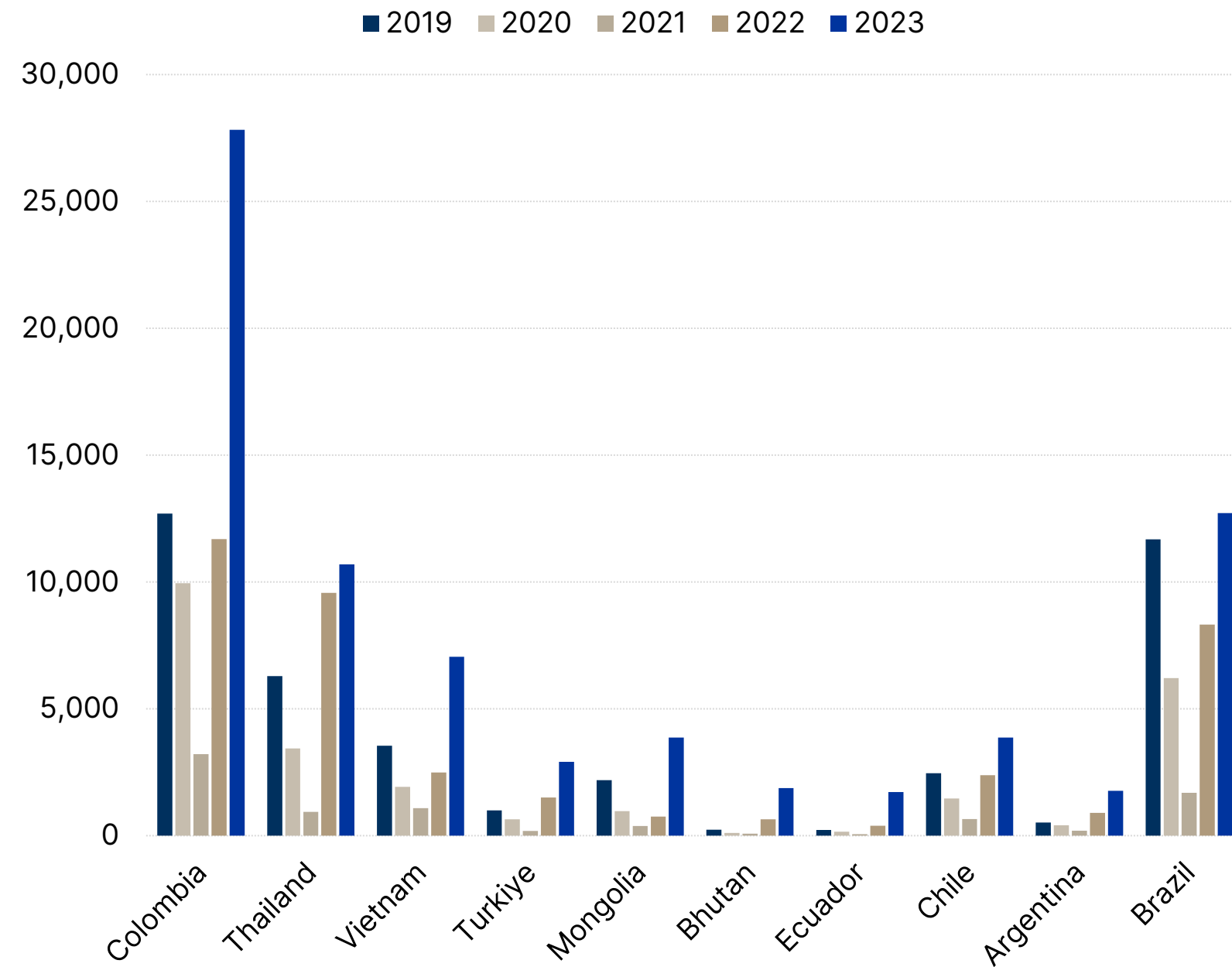
- V-shaped recovery in Australia.
- 5% above 2019 levels (comparing YTD November 2023 vs YTD November 2019).

Source: Australian Government, Department of Education, 2023; commencement = new student enrolment (student visa holders)

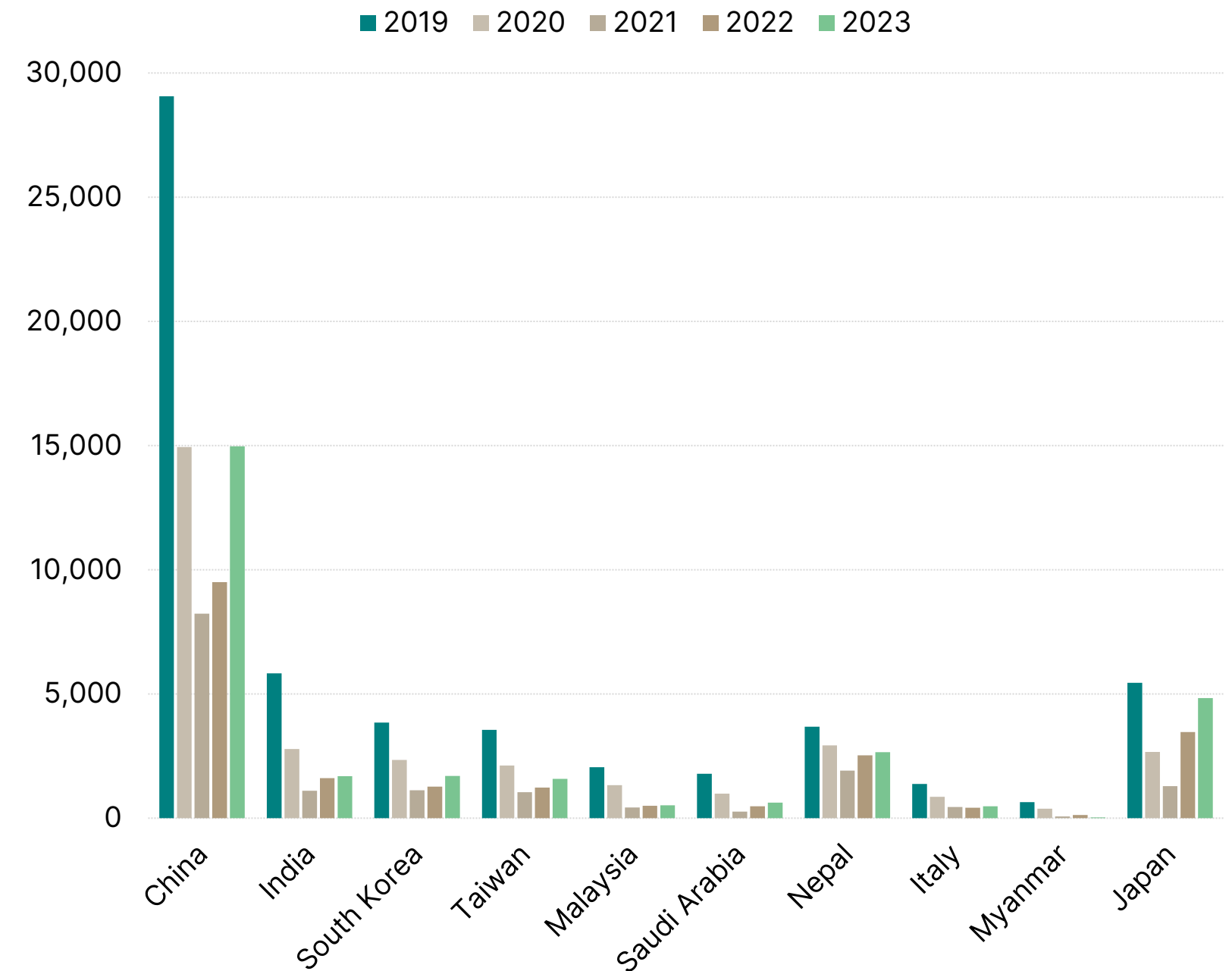
Australia: Market performance (Nov 2023 vs Nov 2019)

STUDENT NUMBERS - COMMENCEMENTS

Top 10 markets with the highest increase (2023 v 2019)



Top 10 markets with the highest decline (2023 v 2019)

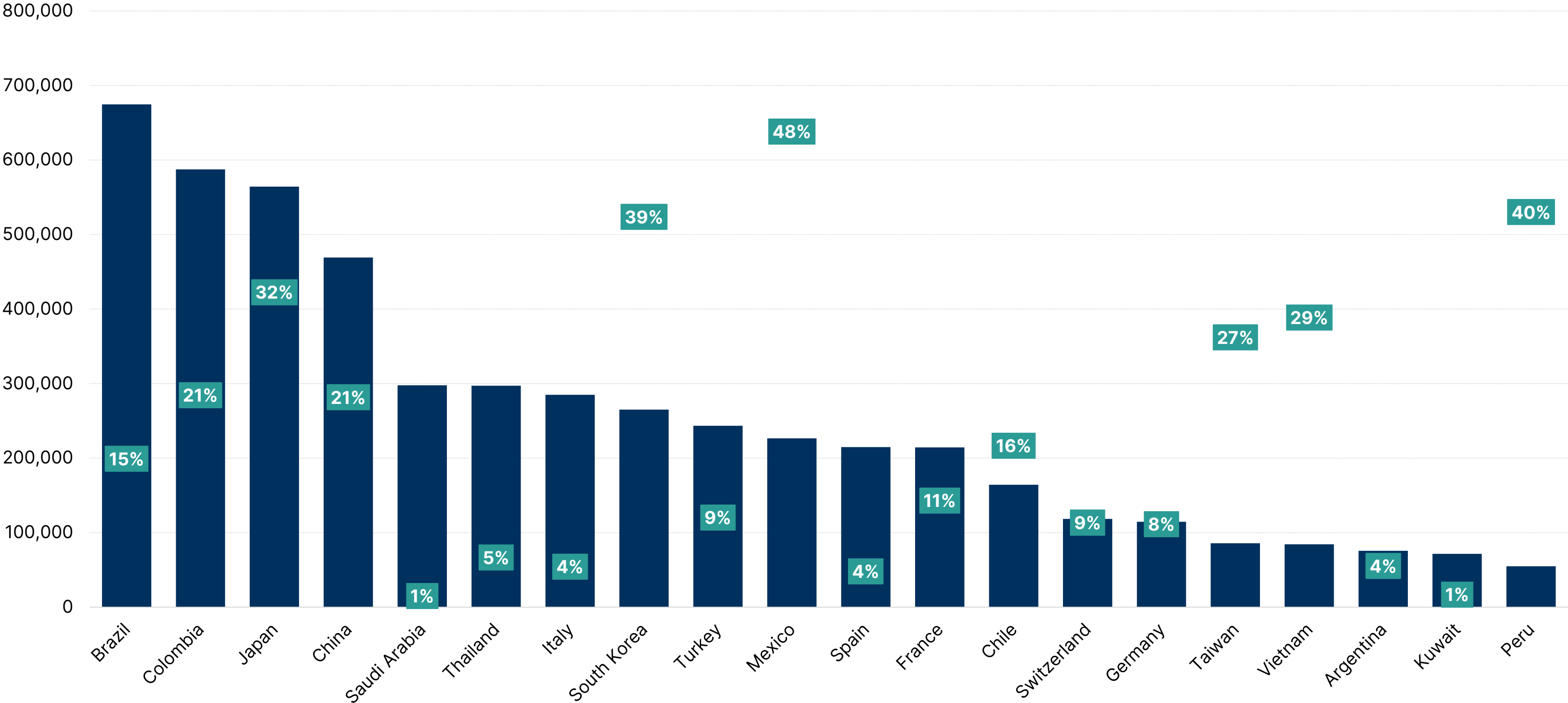


Source: Australian Government, Department of Education, 2023

Canada's Market Share in Top 20 Source Countries in 2022



STUDENT WEEKS

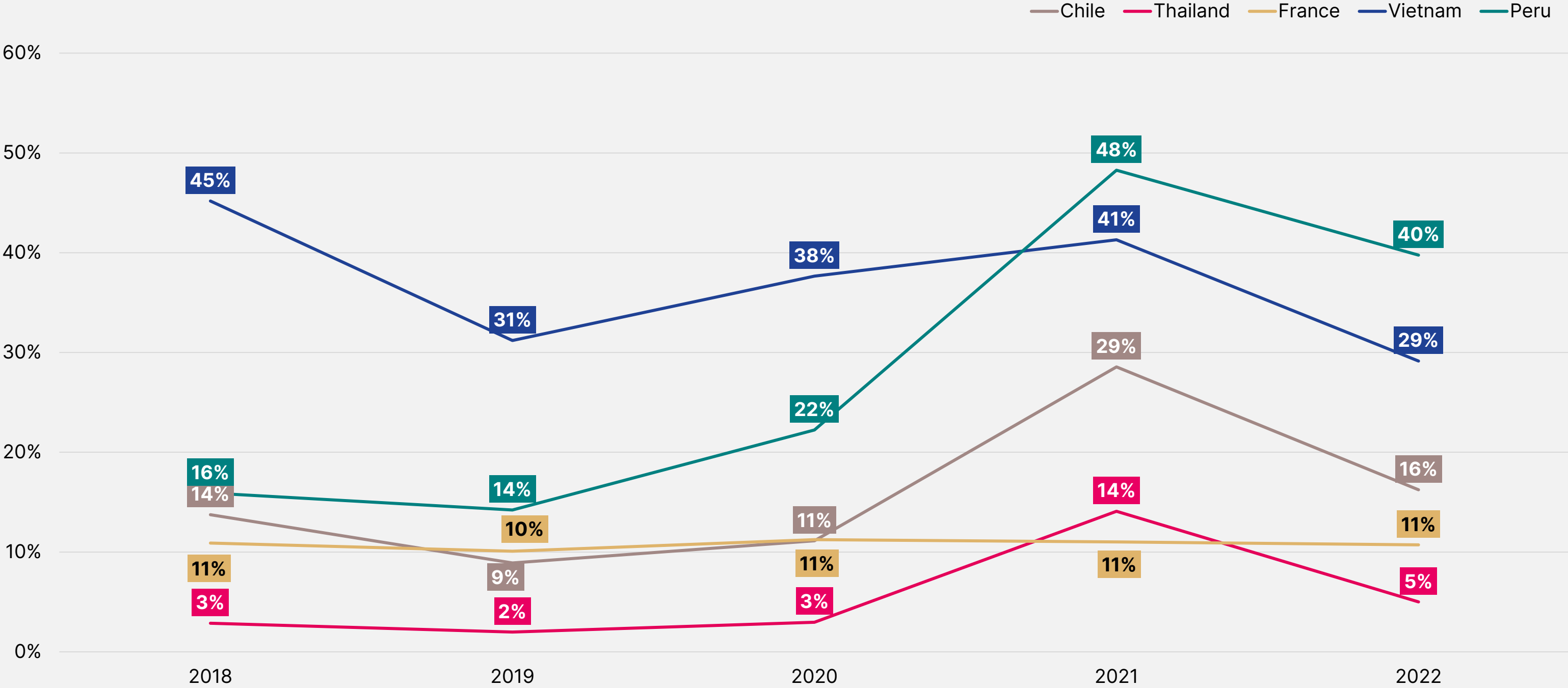


Source: BONARD, 2023
 Note: Figures represent the percentage of 2022 student week volume in Canada as compared to global performance of the source countries in 2022.

Canada's Market Share in Selected Markets (Trend data)



STUDENT WEEKS

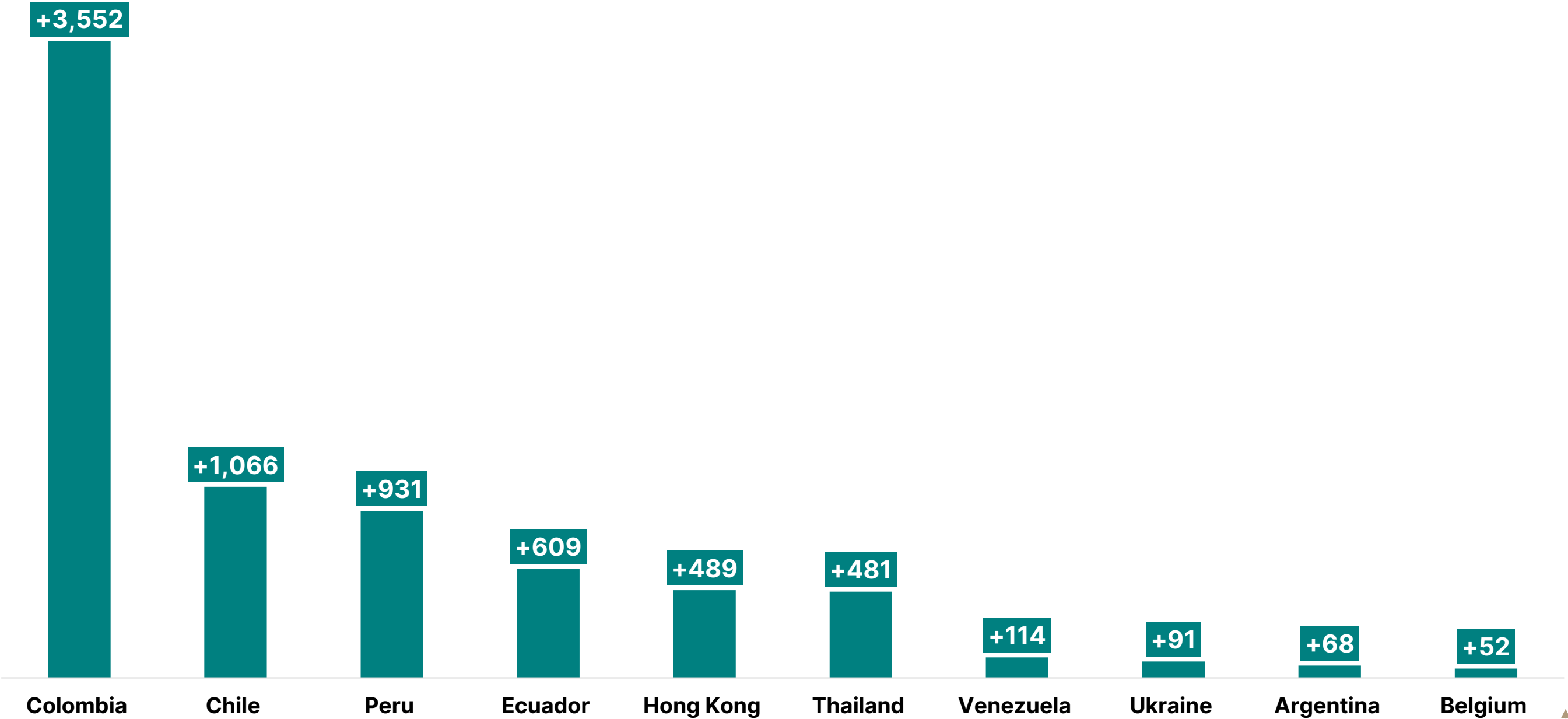


Source: BONARD, 2023
 Note: Figures represent the percentage of 2022 student week volume in the UK as compared to global performance of the source countries in 2022.

Canada: Fastest-growing markets (2022 vs 2019)



STUDENT WEEKS



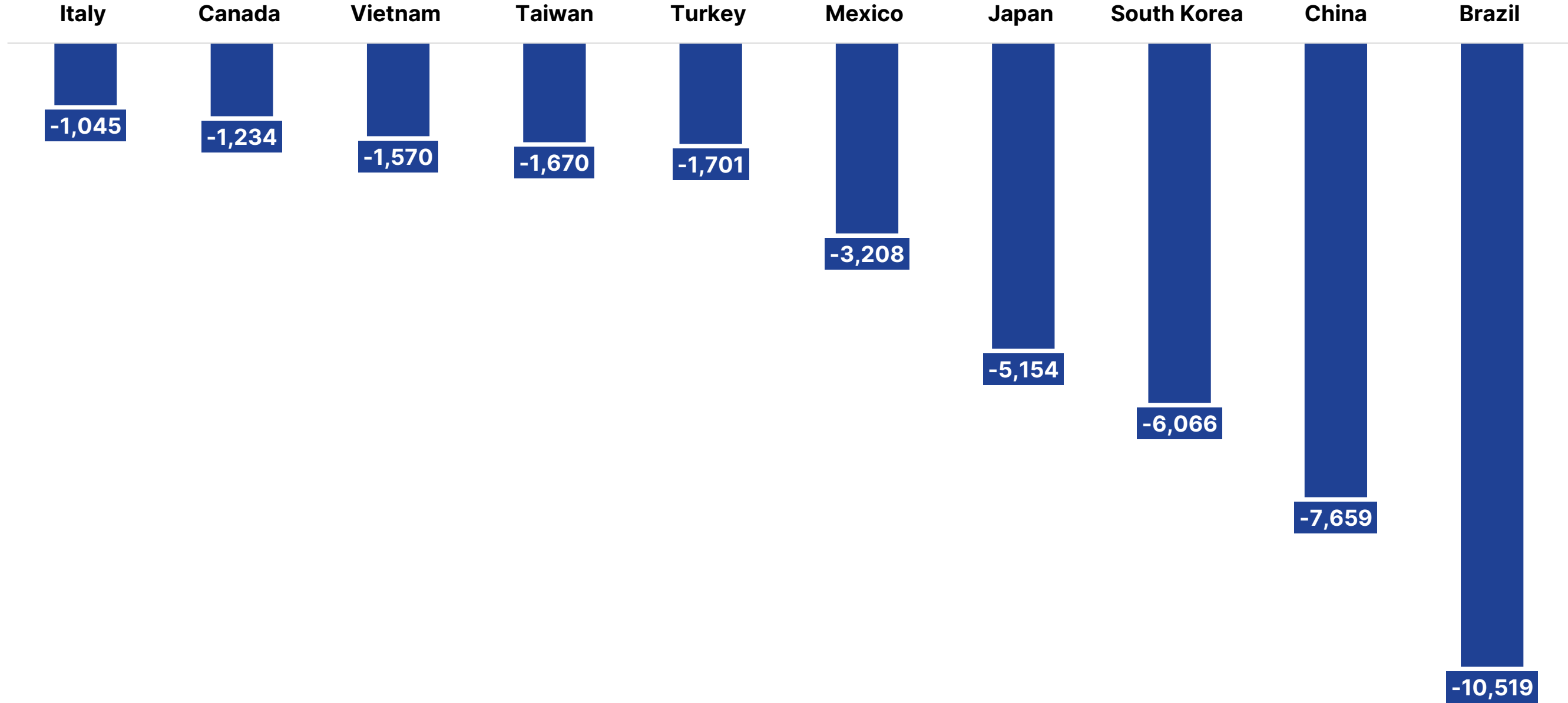
Source: BONARD, 2023

Join at [slido.com](https://www.slido.com)
#lcbonard

Canada: Fastest-declining markets (2022 vs 2019)



STUDENT WEEKS



Source: BONARD, 2023

Canada: 2023 Preliminary Data



~ 135,740
Student numbers



~ 90%
Recovery

~ 1,114,361
Student weeks



~75-80%
Recovery

Top source markets in 2023

Japan

Brazil

Mexico

South Korea

Colombia

Canada: Quarterly Reporting Scheme 2024



- Detailed national and provincial overview of sector performance by quarter
- Comparative analysis of seasonal trends by study locations and comparison with other destinations
- Preference of course types by market
- Seasonal workforce and market recovery trends
- Market projections for the following three quarters



In Q1 2023

Half of students from Thailand studied in pathway programs.



In Q2 2023

Japan was the top market, with 17% of all students at member programs.



In Q3 2023

Mexico and Taiwan were the top growing markets, while Colombia plateaued.



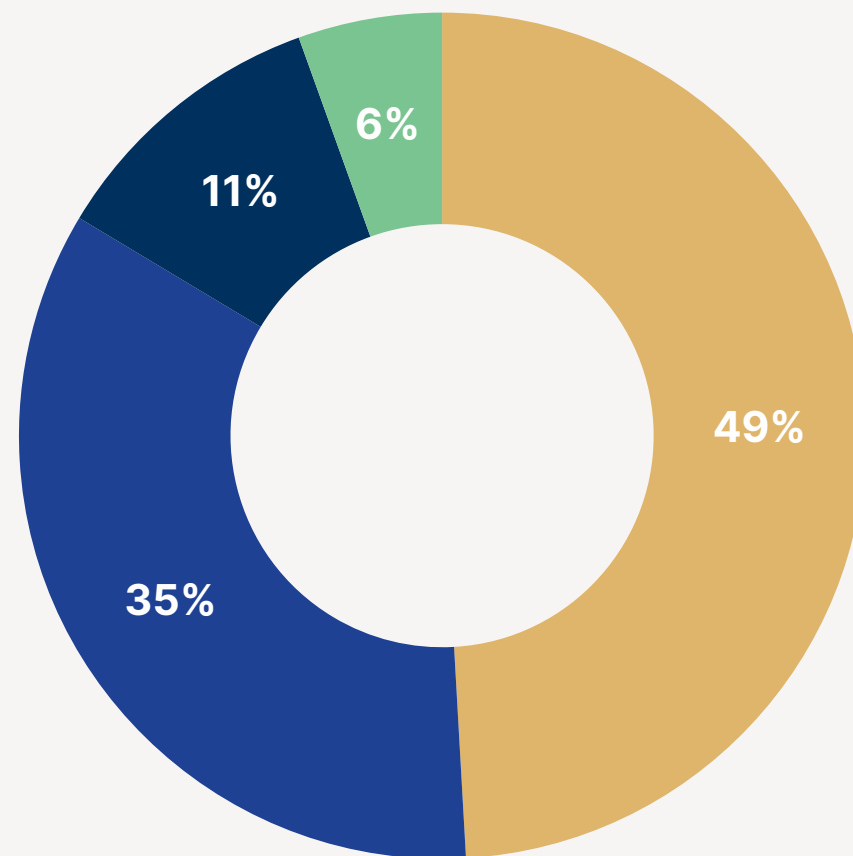
In Q4 2023

47% of all students studied on an eTA in language programs under 6 months.



More info at: <https://www.languagescanada.ca/en/quarterly-reports-on-language-education-in-canada>

Will the visa policy changes, particularly the caps on international students, affect the number of students choosing Canada as a destination for English language studies?



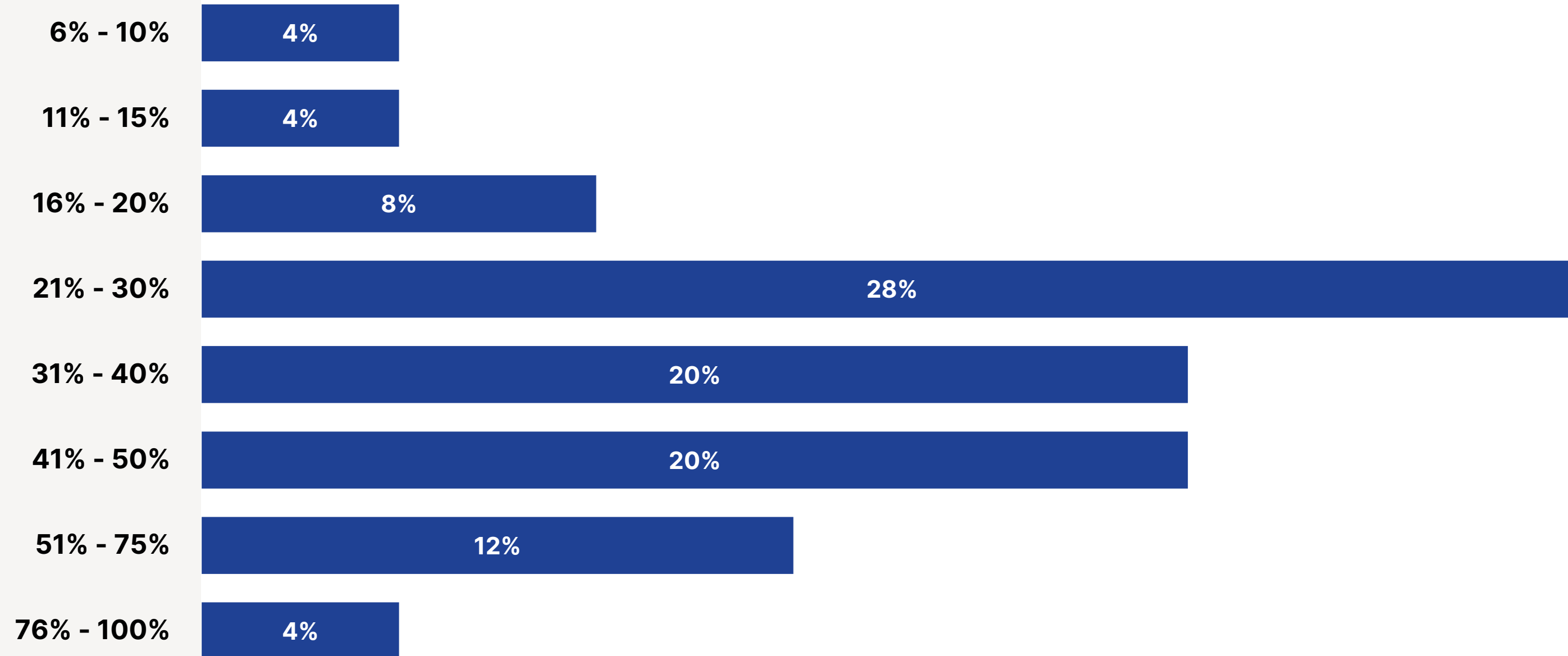
- Yes, there will be fewer students interested in studying English in Canada.
- No, the demand will remain the same.
- No, the demand for Canada will continue to increase.
- Other



Agency Survey: Results



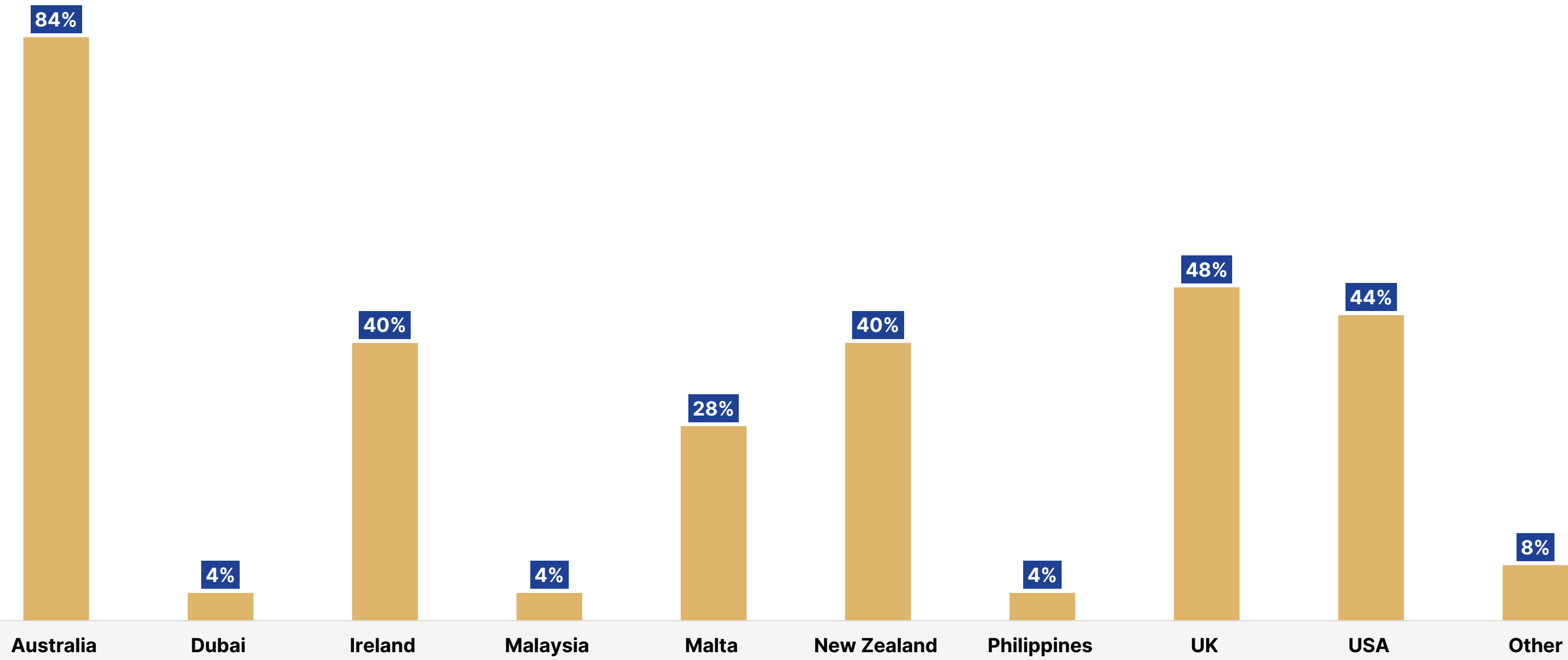
What percentage of students will choose another destination in response to policy changes?



Agency Survey: Results

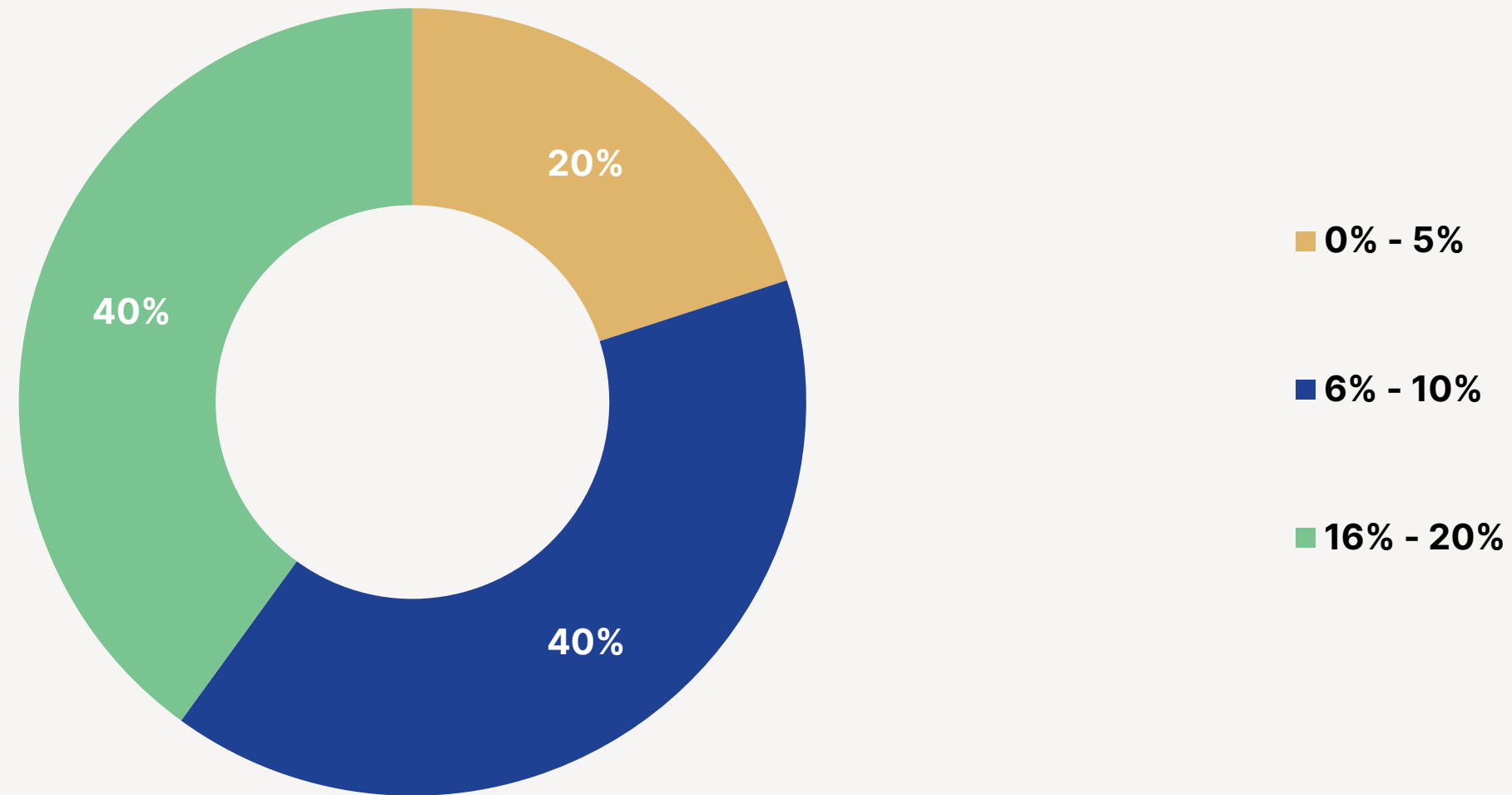


Q: Please choose up to three alternative destinations that you anticipate students will choose instead of Canada.



Agency Survey: Results

What increase in demand do you anticipate?



slido



Which of the following strategies do you plan to implement looking ahead to 2024?

slido



Audience Q&A Session

ⓘ Start presenting to display the audience questions on this slide.

Contact us for more.

To request a copy of the session
presentation, please contact us
at education@bonard.com.

Headquarters

Museumstraße 3b/16
1070 Vienna
Austria



Sarah Verkinova

Senior Research
Manager

BONARD
EDUCATION

Follow our latest releases

