

FRENCH LANGUAGE PROGRAMS RESEARCH



SAMUEL VETRAK
STUDENTMARKETING, CEO

studentmarketing
YOUTH TRAVEL CONSULTANCY



LANGUAGES CANADA ANNUAL CONFERENCE
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Scoping study

Secondary research – collection and analysis of existing data

- Use of French language worldwide
- Research on French language schools worldwide (global supply)
- Number of French language travel (FLT) students worldwide



FRENCH LANGUAGE USAGE

NUMBER OF FRENCH SPEAKERS WORLDWIDE

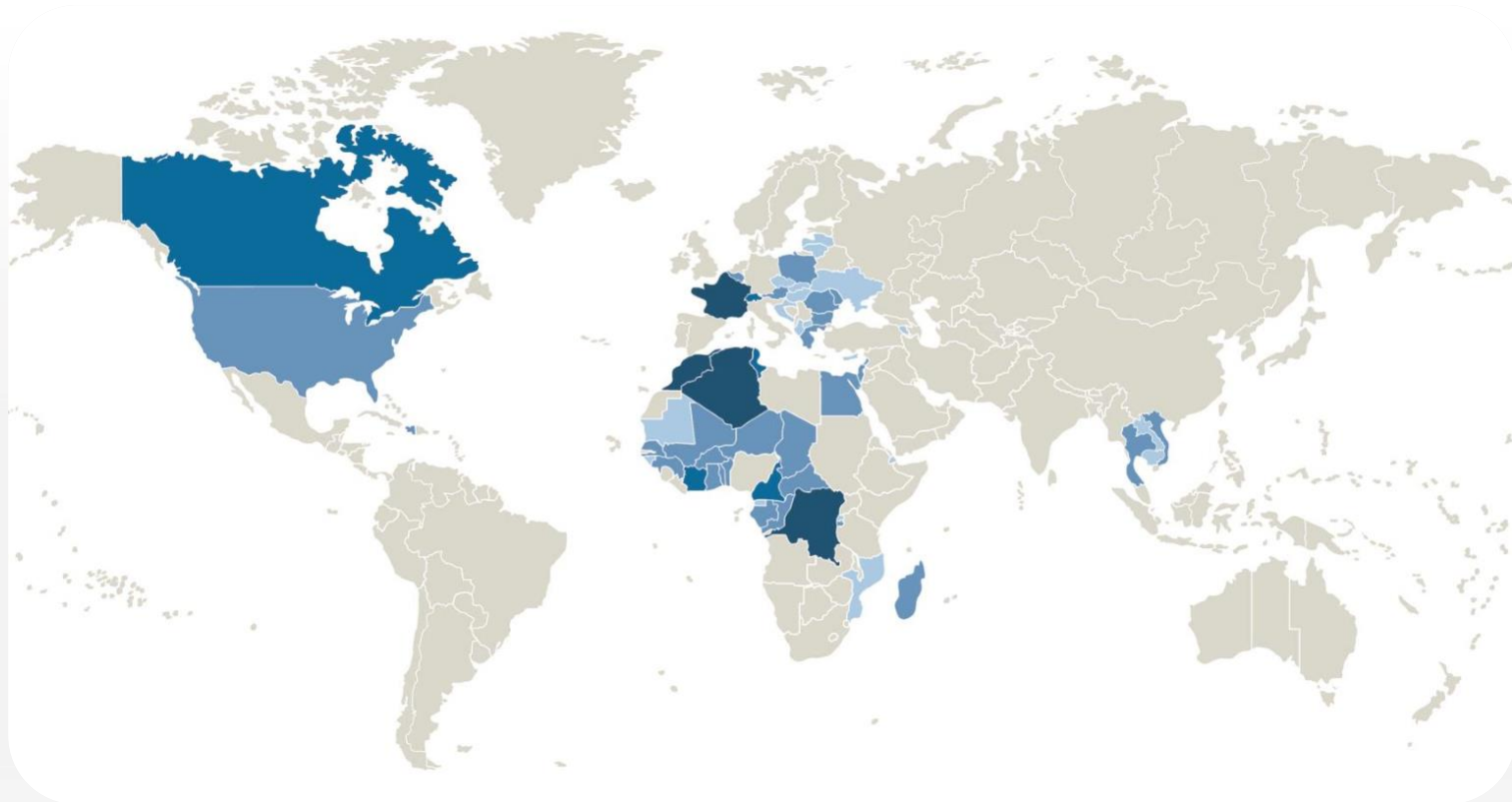
- **220** million French speakers worldwide
- Official language in **29** countries
- It is predicted that by 2050, French will be spoken by **700** million speakers (increase from 3% to 8% of the world population)
- **120** million learners of French as a foreign language worldwide
- **Number of FLT students: ???**

Source: International Organisation of La Francophonie, 2015



FRENCH LANGUAGE USAGE

REGIONAL DISTRIBUTION OF FRENCH SPEAKERS

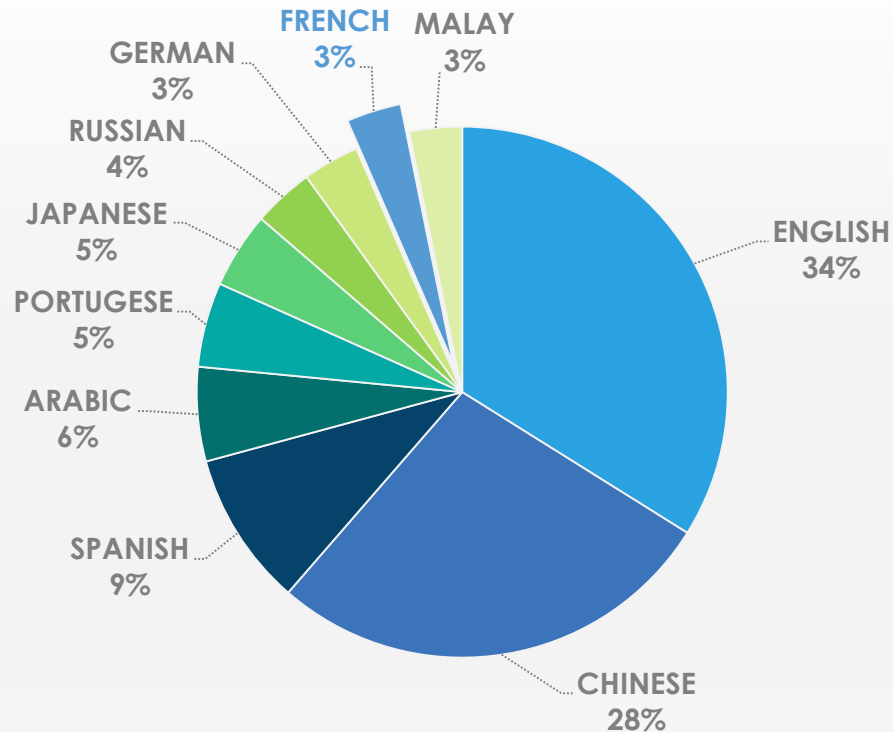


● MORE THAN 10 MILLION ● 5 - 10 MILLION ● 500,000 - 5 MILLION ● LESS THAN 500,000

Source: International Organisation of La Francophonie, 2015

FRENCH LANGUAGE USAGE

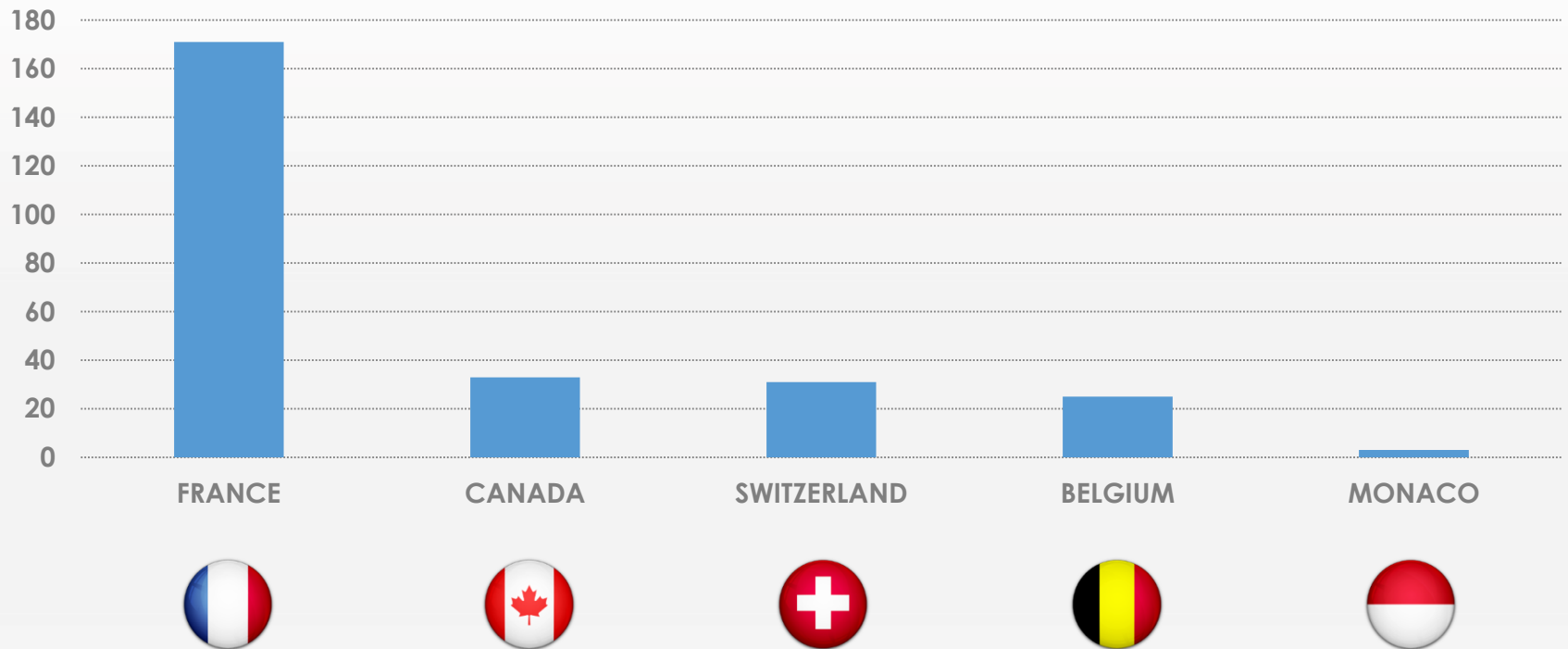
NUMBER OF INTERNET USERS BY LANGUAGE SPOKEN



Source: Internet World Stats, 2015

GLOBAL SUPPLY

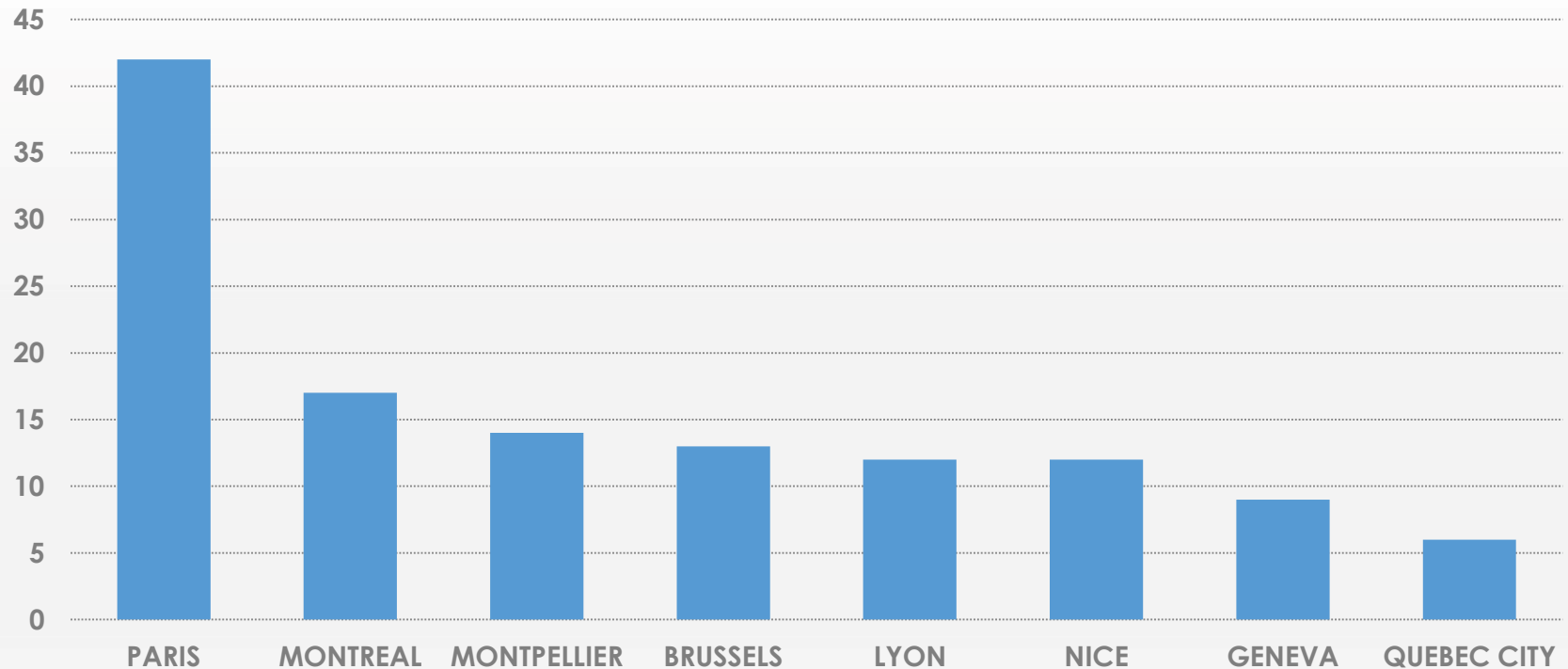
NUMBER OF FRENCH LANGUAGE SCHOOLS IN SELECTED DESTINATIONS



Source: StudentMarketing, 2015

GLOBAL SUPPLY

CITIES WITH THE HIGHEST NUMBER OF LANGUAGE SCHOOLS



Source: StudentMarketing, 2015

FRENCH LANGUAGE MARKET

NUMBER OF FRENCH LANGUAGE STUDENTS IN CANADA

- **7,044** FLT students
5% of all students enrolled at LC schools
- **584** were juniors
- Average length of stay of FLT students lower than that of ELT students:
9 weeks vs. 11.9 weeks
- **56%** of FLT students stayed between 4 – 12 weeks

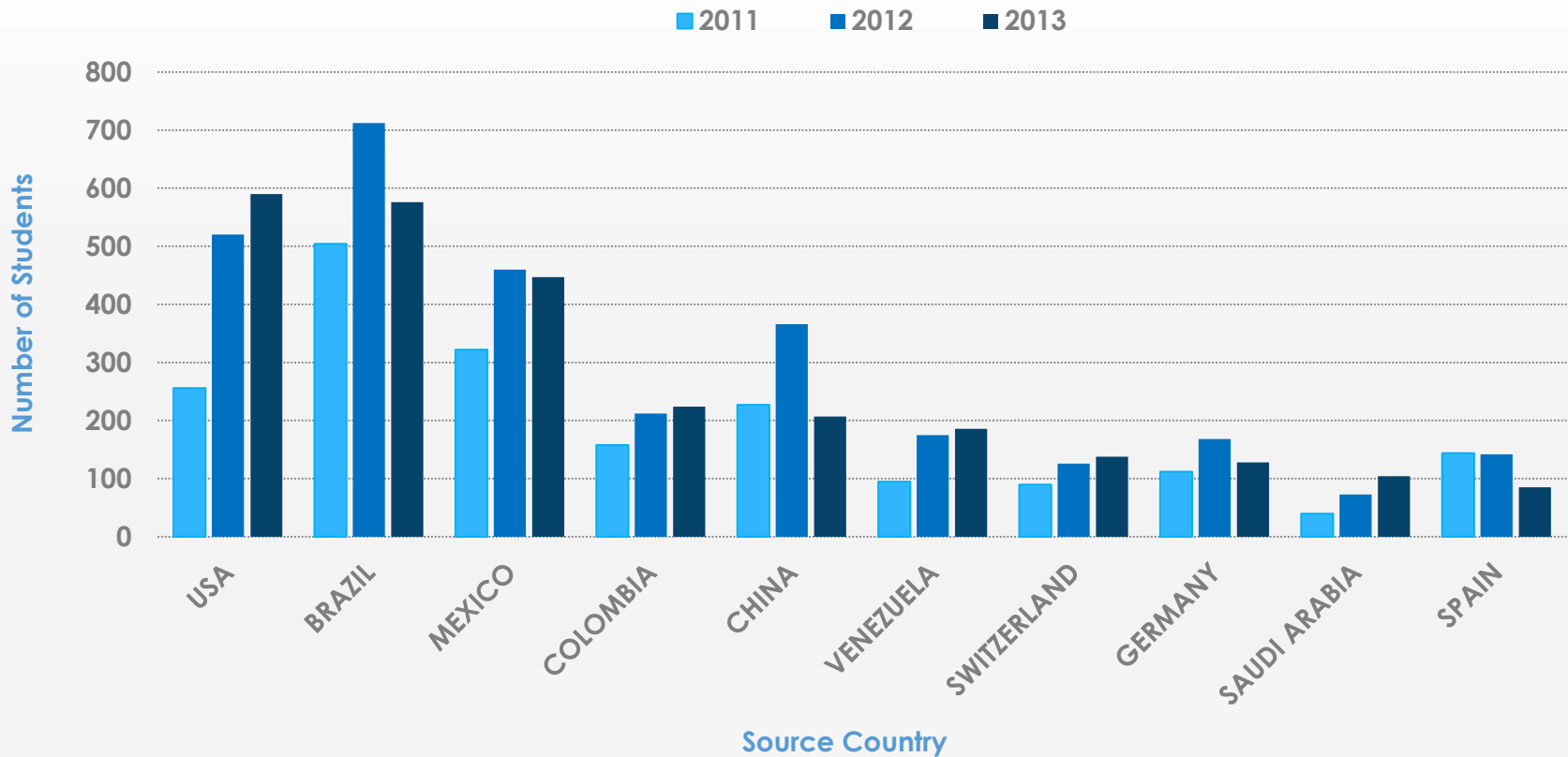


Source: Languages Canada, 2015



FRENCH LANGUAGE MARKET

NUMBER OF FRENCH LANGUAGE STUDENTS IN CANADA



Source: Languages Canada, 2014



FRENCH LANGUAGE MARKET

CURRENT PATTERNS IN THE FLT SEGMENT IN CANADA

- What do the current patterns show?
- Students from across Canada represent a significant share out of all students
- **PROMOTION WITH CANADA** – on-shore agents – there are currently **73** in Canada
- Proximity plays an important role

42%

51%

of students coming outside of Canada were from the Americas

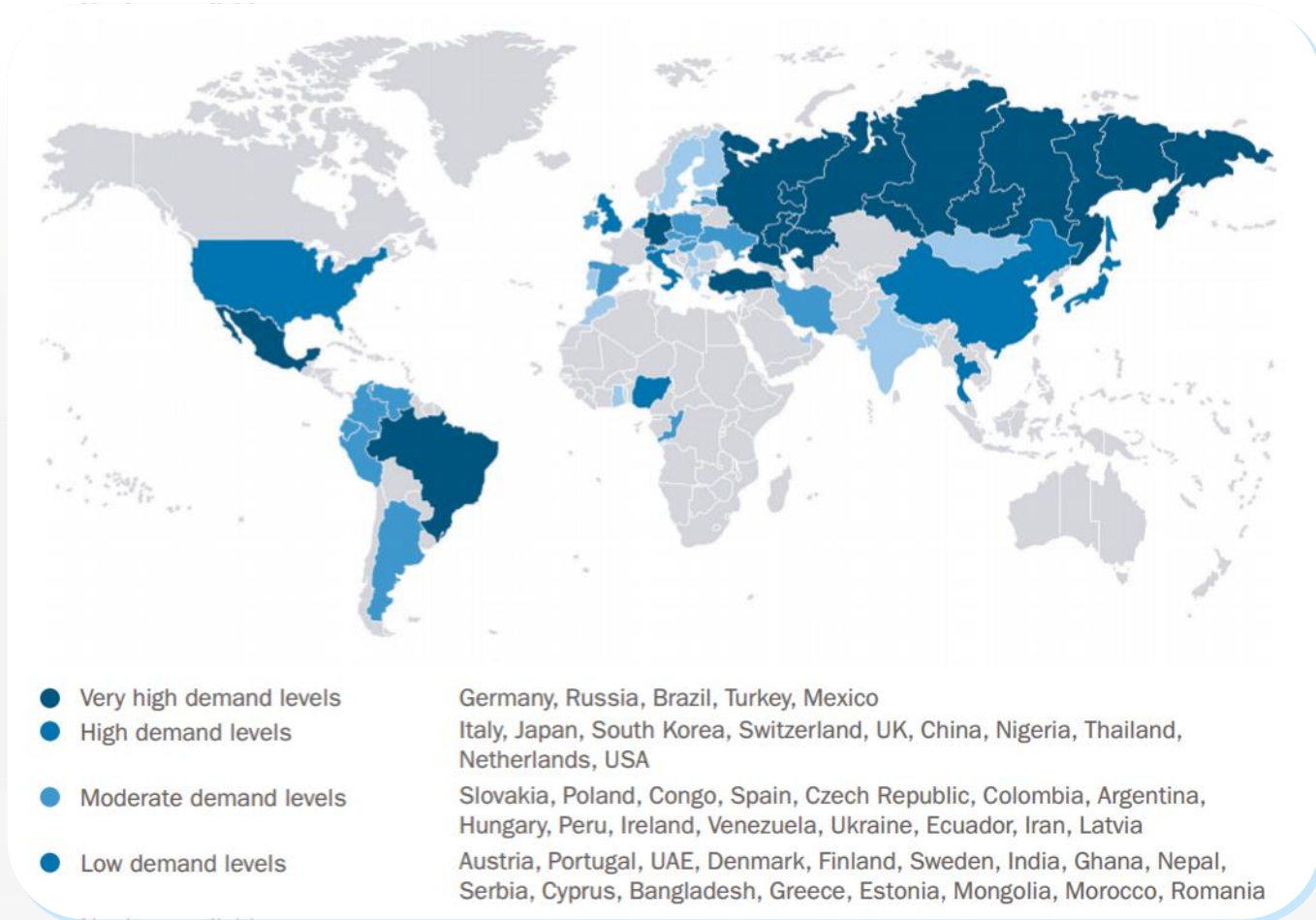
- **PROMOTION OUTSIDE OF CANADA**
- Identification of suitable source countries to be targeted by marketing activity

Source: Languages Canada, 2014



K-12 MARKET

DEMAND FOR FRENCH LANGUAGE HIGH SCHOOL PROGRAMS



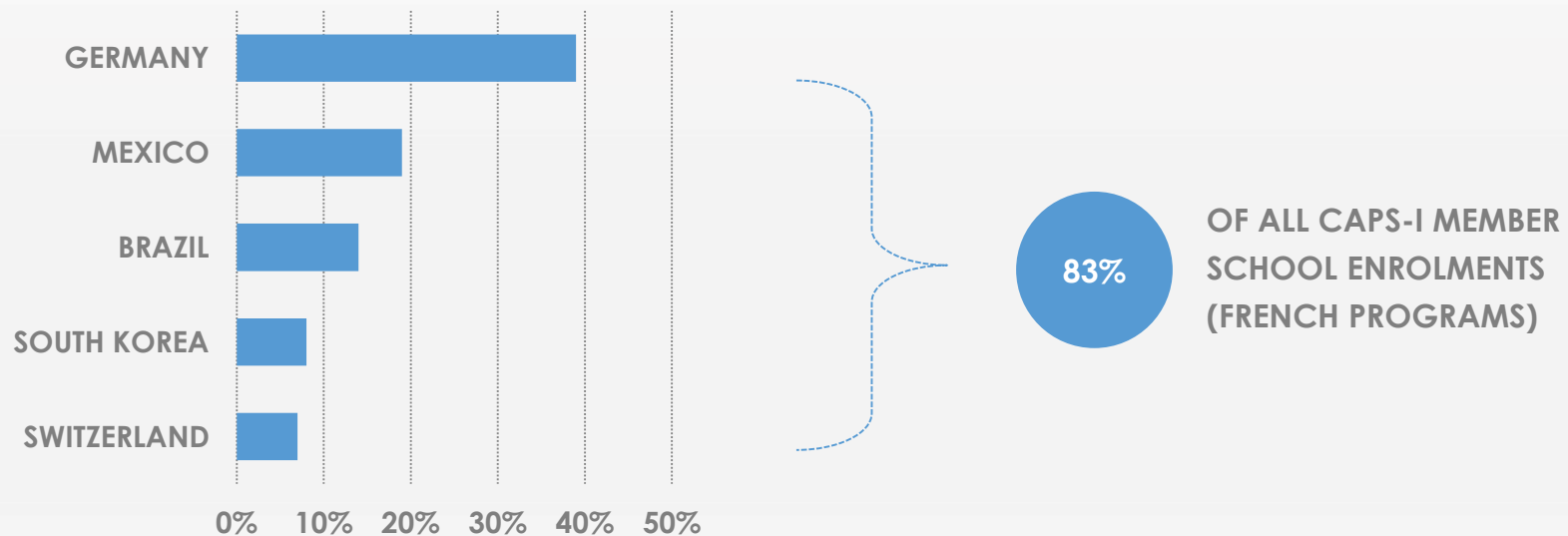
Source: CAPS-I, 2014; StudentMarketing, 2014



K-12 MARKET

SOURCE MARKETS

In the 2013/14 academic year, the top 5 source markets of international K-12 students enrolled in **French language programs in Canada** were:



Source: CAPS-I, 2014; StudentMarketing, 2014

Why Canada

- + Bilingual destination/environment
- + Family background or immigration reasons
- + Canadian culture
- + Quality and reputation of educational institutions
- + Affordable/competitive price
- + Interest in further studies in Canada
- + Safe place to be

Why destinations other than Canada

- Distance (proximity) -
- Costs (less expensive) -
- Other destinations are more attractive in general -
- Not the “real” French in Canada -
- Visa issues (delays/refusals) -
- Lack of promotion -

Source: CAPS-I, 2014; StudentMarketing, 2014

RESEARCH OVERVIEW

WHAT DO WE KNOW NOW?

- FLT is an under-documented segment of the language travel industry
- Absence of a universal body that would measure the segment
- **Canada is the only destination doing French language program measurement**
- Ratio of **ELT** vs. **FLT** students in Canada: **95%** vs. **5%** (**99%** vs. **1%** in the K-12 segment)
- French language courses are promoted by **10% - 20%** of education agents

Source: Languages Canada, 2014, CAPS-I, 2014, StudentMarketing, 2015



GLOBAL PRIMARY RESEARCH



Target providers; **n=250**

France, Canada, Switzerland, Belgium

To acquire information about source markets, booking channels & patterns



Target agents; **n=16,000**

Worldwide

To acquire information about demand levels, customer preferences, opportunities and challenges



NEXT PHASE

WHAT WILL PRIMARY RESEARCH BRING?

- To help understand the **global potential for French language programs**
- To provide a destination overview – **where Canada sits in comparison to other destinations**
- To identify the **most promising source markets**
- To identify the **most effective marketing techniques**
e.g. trade missions, FAM tours, online marketing
- To help determine **how to promote Canada as a FLT destination**
unique selling points, e.g. bilingualism
- To deliver an insight into **customer preferences**
purpose of study, course type, average length of stay, accommodation
- To identify any **barriers** related to promoting French language programs



THANK YOU



studentmarketing
YOUTH TRAVEL CONSULTANCY



HERRENGASSE 1-3, 1010 VIENNA, AUSTRIA



+43-650-612-452



BUSINESS@STUDENT-MARKET.COM



WWW.STUDENT-MARKET.COM



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SAMUEL VETRAK, CEO, STUDENTMARKETING