

# Executive Summary

While Canada entered 2021 with borders opened to international students, due to the COVID-19 pandemic, local lockdown continued to affect the French and English language sectors. Considering the negative effects of the pandemic in 2021, this year's edition of the report provides a thorough understanding of the impact of COVID-19 on both the language education sector in Canada and on international students.

## » Canada at a Glance

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The 2021 member base included 216 program providers, up from 206 the previous year, of which 189 completed the survey. The majority were located in Ontario (40%), while Quebec and British Columbia hosted 22% and 20%, respectively.

The disruption caused by the COVID-19 pandemic was still being felt throughout the international education industry. However, Canada's border reopening to international students in 2020 helped the sector to face smaller drops in student numbers. Languages Canada member programs enrolled a total of 57,423 students in 2021, a 12.4% decrease from the previous year. Meanwhile, student weeks dropped by 6.1% to a total of 721,478.

While in 2020, Canada's private sector showed significantly greater decreases than the public sector, this situation was reversed in 2021. The public sector in 2021 witnessed a dip of 28.4% in student numbers and 29.4% in student weeks compared to 2020, while the private sector lost 5% in student numbers and actually gained 8.9% in student weeks.

## » Student Demographics

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The most popular course in 2021 remained General English or French, which accounted for an even greater percentage of students (69%) than in 2020 (60%). English or French for Academic Purposes was the second most popular course type, catering for 16% of language students.

The proportion of junior students shifted even further, with under-18 learners representing approximately 3% of the whole student population of the Languages Canada membership in 2021 (compared to 5% in 2020 and 13% in 2019).

In 2021, the ratio of students on a study permit continued to increase, rising from 44% in 2020 to 56% in 2021. This is a considerable change from 2019, when the largest cohort (43%) was comprised of students on a visitor visa.

Forty-six percent of students were enrolled for 4–12 weeks. The second most popular course duration was 13–24 weeks, accounting for 25% of students.

## » Source Markets

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Japan became Canada's largest sending country for English and French language students, with 6,414 students enrolled in language courses at individual member programs. Japan's student numbers grew by 15.2%, overtaking China and Brazil.

The most impressive growth in the top five source countries was displayed by Colombia, which took the second spot in the list: with 6,247 students in 2021, it saw a 72.6% increase over 2020.

Percentage-wise, of the top 10 source countries for Languages Canada member programs, Chile experienced the largest increase in student numbers (+95.1%).

### » COVID-19 Implications for the Sector

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In 2021, most student weeks (51%) were still delivered online only, in (27%) or outside (24%) Canada. The share of student weeks delivered in person continued to decrease (to 29%, compared to 33% in 2020), while hybrid and blended model delivery increased from 8% in 2020 to account for 20% of student weeks in 2021.

Cumulatively, Languages Canada members received \$42.6 million in government support in 2021. In-kind or direct financial support received from individual members in 2021 amounted to \$8.8 million.

While border closures and travel restrictions were major concerns for Languages Canada members in 2020, in 2021 the biggest challenge for the language education sector in Canada was visa processing times and difficulties experienced by students when applying for visas (58% of member programs). The second and third biggest challenges were local (49%) and international (46%) disruptions.

Languages Canada member centres employed a minimum of 3,700 staff in 2021. While there was an increase in the number of full-time and seasonal staff (+10% and +14%, respectively), the workforce did not reach pre-pandemic levels.

There was no large-scale human resources recruitment in 2021, as 59% of Languages Canada member programs were not looking to take on any new hires. The biggest shortage lay with language teachers. As many as 32% of new positions were filled by academic staff, followed by administrative staff, who accounted for 21% of the new workforce in 2021.

### » Focus on French Programs

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In 2021, 4,669 students participated in French language courses with Languages Canada members. French programs reported a total of 38,318 student weeks in 2021. Internationally, the top source markets were Colombia (296 students), USA (264), Mexico (242), and Brazil (174).

Domestic students, whether with citizenship or permanent residency, accounted for 59% of the overall student population enrolled in French language member programs.

The most common course duration, representing 62% of students, was 4–12 weeks.