Annual Report on Language Education in Canada

2019 Executive Summary

Languages Canada
Langues Canada

BONARD

Executive Summary

Following a successful transition last year, this research continues a holistic measurement of the language education sector in Canada. By bringing together all English and French language providers in the country, it establishes a platform for a true representation of the sector.

This study was initiated by Languages Canada, the national language education association which represents 212 private and public members offering accredited English and French programs. Through the project, the association seeks to elevate and further professionalize the sector in Canada. Consequently, it commissioned BONARD, an independent market research specialist in international education, to administer data collection, analysis and reporting.

The study assesses key performance indicators such as market size, student demographics, source market performance, booking channels, marketing activities and operations at the pan-Canadian level.

In 2019, there were 370 known programs teaching English and/or French to international and Canadian students. The majority of language programs were located in Ontario (37%), followed by British Columbia (25%) and Quebec (20%).

In total, 239 programs participated in the survey (205 of 212 accredited Languages Canada members as well as 34 non-member programs), which translates into an overall sector response rate of 65%. Cumulatively, these programs taught 155,383 language students. On average, students spent 10 weeks on their courses, generating a minimum of 1,522,785 student weeks. Of the total student population, 145,684 were international students. Based on an extrapolation using newly-acquired data, it was estimated that 86% of international language students studied at Languages Canada member programs in 2019.

In the global context, Canada constituted the fourth most popular English language travel destination in terms of international student numbers (after the UK, the USA and Australia). From a global market share perspective, Canada performed well in Asian and Latin American countries in 2018, with the highest share in Mexico (where it accounted for 55% of all student weeks), Vietnam (42%) and India (32%). Canada also claimed a strong share in South Korea (31%) and Japan (26%).

Based on Languages Canada member data, the overall figures showed a drop of 3.9% in student numbers and 8% in student weeks, compared to the previous year. Student intake in public programs dipped noticeably, as these welcomed 10% fewer students than in 2018 (the most recent year data is available). Private sector programs hosted 1.8% fewer language students, while the student week volume dropped by 7.2% due to shorter stays.

Junior students continued to grow both in absolute numbers as well as share. In 2019, the under-18 age group accounted for 19,163 students, comprising 13% of all language learners in Canada.

Study permit holders represented 29% of the market. They were chiefly concentrated in the public sector, where they encompassed 65% of all students. Most students in English or French language programs (43%) did not require any visa to enter Canada (i.e. entered as "visitors").

The most popular course duration was revealed to be between 4 and 12 weeks (45%). As many as 20% of language learners opted for courses with a duration of between 13 and 24 weeks. Students enrolled in the private sector exhibited shorter stays: those studying for fewer than 4 weeks represented 6% of the student population at public institutions and 30% on private language programs.

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From a regional perspective, the two most popular provinces – Ontario and British Columbia – accounted for 78% of all students. At the same time, these provinces saw a dip in student numbers (1% and 7% respectively). Quebec and Saskatchewan were the only two provinces which recorded an uptick in enrollments.

Most students came from Asia (44%), followed by Latin America (35%). Europe, representing 12% of all language learners, constituted the third most important source region for Canada.

The top source markets in 2019 were Brazil (24,890 language students), Japan (20,590), China (17,166), Mexico (17,065) and South Korea (14,092). Of these, Mexico was the only one to post y-o-y growth (17% increase). Thanks to this, Mexico was the fastest-growing source country in the top 10 ranking. Canada in itself is also a considerable market. In 2019, 6,204 students were Canadian citizens or permanent residents, making this the sixth most common nationality on language programs in Canada.

The preferred method of booking a language course in Canada was through education agents (59%). The second most popular channel was through direct bookings (31%). Walk-ins represented 12%, and 5% of language learners were enrolled through institutional agreements. A further 3% came to Canada via government scholarships.

The French language segment welcomed 11,088 students. Of these, 2,164 were domestic students (20% of all French language learners). Internationally, the top source markets were Mexico (1,441), China (1,115), the USA (1,068) and Brazil (964). French programs were less reliant on agency bookings than English language providers (45% of French program bookings were through agencies).

The sector employed a minimum of 8,485 staff, with almost 49% of the workforce engaged in full-time positions. On average, for every five teachers, there were three support staff.

Challenges faced by language programs were cited as student visa denials (63%) as well as competition, both domestic (62%) and international (42%), and visa processing times (49%). More than a third of programs were also concerned by HR-related issues.

Of the 6,374 refused visas reported by responding programs, the countries with the highest number of visa refusals in 2019 were Brazil, India and Turkey (36% of all visa refusals).

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