

# Executive Summary

With border closures, cancelled flights, and a shift to online teaching and learning, it is indisputable that the Covid-19 pandemic has shaken the international education industry on a global scale. Considering the market situation in 2020, 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 international students.

## » Canada at a Glance

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The 2020 member base comprised 206 programs, 196 of which provided data for the purposes of this report. The majority of Languages Canada member programs are located in Ontario (40%), followed by British Columbia (21%) and Quebec (18%).

Due to the Covid-19 pandemic, the language education sector in Canada saw considerable decreases in student numbers and student weeks compared to 2019. Overall, Languages Canada member programs welcomed 65,536 students – a decrease of 56.3% from the previous year. Meanwhile, student weeks dropped to 768,022, representing a fall of 49.2%.

The private sector experienced a greater decrease in student numbers than the public sector (-61.4% vs -38.9%). While the public sector experienced a slight decline in the average length of stay (14.5 weeks in 2020 compared to 14.9 in 2019), overall the average course duration grew to 11.7 weeks.

In the global context, Canada constituted the fourth most popular English language travel destination in terms of international student numbers (after the UK, Australia and the USA) in 2019. Canada either improved or maintained its market share in 2019 and attracted growing proportions of Chinese (a 16% share), Japanese (28%), and Korean (33%) students. Canada lost market share in India, where only 14% of students studying English chose Canada (compared to 32% in 2018).

## » Student Demographics

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The most popular course type in 2020 was General English or French, accounting for 60% of all students studying at Languages Canada member programs. English or French for Academic Purposes attracted 19% of students.

In 2020, the under-18 age group represented 5% of the whole student population at Languages Canada member programs (compared to 13% in 2019), suggesting a more severe impact of Covid-19 on junior student enrolments.

In 2020, almost every second student (44%) enrolled on a study permit. Visitors accounted for 26% of the student body. Moreover, a minimum of 14,904 students were not able to enter Canada for face-to-face studies during 2020 and studied fully online.

Forty-five percent of students took part in classes lasting 4–12 weeks, while 24 percent of language students chose courses with a course duration of between 13 and 24 weeks

## » Source Markets

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China outperformed Brazil as a top source market for Languages Canada member programs in 2020, experiencing a lower decline in student numbers from 2019 to 2020, likely due to the fact that more Brazilians tend to come to Canada without a study permit.

Furthermore, of the top 10 source countries for Languages Canada member programs, Mexico experienced the largest decline in student numbers from 2020 to 2019 (-70%), followed by Japan (-69%) and Brazil (-66%).

### » Covid-19 Implications for the Sector

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The Covid-19 pandemic caused drastic disruption to the operation of Canadian language programs and international student mobility. At least 26,382 registered students were completely unable to undertake their studies in Canada. In addition, 20,784 students began their studies in person, but their classes were disrupted after the introduction of restrictions and local lockdowns; some of these classes were transitioned to virtual delivery while others were postponed.

Due to Canada's border closure and provincial restrictions for in-person classes, 59% of student weeks in 2020 were delivered online – either within (32%) or outside (27%) Canada. Thirty-three percent of weeks were delivered in-person and 8% of student weeks were delivered in a blended format.

As many as 81% of programs reported loss in their gross revenue in 2020. The highest share of programs (28%) experienced a drop of between 61% and 80% in their gross revenue over 2019.

Language programs had to make changes to permit face-to-face learning as well, which brought an unexpected increase of costs. Based on the data provided by member programs, it is estimated that Languages Canada membership invested a minimum of \$1.2 million to ensure compliance with federal and provincial government health and safety requirements.

Language programs in Canada cumulatively reported employing a minimum of 3,646 staff. This constitutes a sharp decrease from 8,485 employees in 2019 (-57%).

### » Focus on French Programs

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In 2020, 4,448 students were admitted to study French at Languages Canada member programs. Of these, 787 were from Canada. French programs recorded a total of 37,956 student weeks in 2020. Internationally, the top source markets for French were China (411), the USA (306), Brazil (301), and Colombia (256).

Similar to 2019, domestic (Canadian) French language students favoured public sector institutions, where they comprised 74% of the student population.

In terms of course duration, short-term courses were most popular among French learners; one-in-four students studied for less than four weeks in 2020.