Languages Canada
Langues Canada

Executive Summary

Canada's Official Languages Programs 2025 Annual Survey

June 2026

Canada's Official Languages Programs 2025 Annual Survey Report

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Prepared on behalf of:

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Foreword

Canada's English and French language education programs have long played a vital role in connecting our country to the world. They strengthen Canada's linguistic and cultural fabric, support newcomers and domestic learners, prepare students for further education and employment, and generate meaningful benefits for communities across the country.

However, the 2025 Annual Survey Report makes it unmistakably clear that the sector is now in a state of crisis. Languages Canada members welcomed just 81,636 students, who completed nearly 799,000 student weeks - sharp declines that reflect not only shifting global conditions, but most critically, the direct impact of restrictive and unpredictable government immigration and visa policies. These policy decisions have significantly reduced enrolments, forcing programs to scale back operations and, in some cases, close entirely.

While economic uncertainty and increased international competition contributed to the downturn, it is the policy environment that most decisively undermined the sector's stability and growth. The consequences are felt across the country, with institutions struggling to maintain viability and communities losing the economic and cultural benefits these programs provide.

Despite these challenges, members have demonstrated resilience. Public programs managed to maintain relatively stable enrolments compared to 2024, and institutions have expanded online and hybrid offerings. Domestic learners have taken on a larger role in certain segments, and Canada continues to hold a presence in key international markets. Even amid this crisis, Languages Canada members contributed an estimated $1.03 billion directly to the Canadian economy in 2025 - representing direct economic activity, much of it generated through export revenues - highlighting the sector's enduring value.

The sector cannot recover through adaptation alone. Rebuilding Canada's competitiveness requires an immigration and visa framework that is clear, predictable, and responsive to the distinct nature of language education. This includes sector and government messaging that restores confidence in Canada as a welcoming study destination. Continued investment in quality, market diversification, and innovative recruitment will remain important, but these efforts can succeed only if policy-driven barriers to student access are addressed.

With responses from 160 member programs and a 98% participation rate, this report provides a comprehensive and sobering evidence base for institutions, governments, partners, and stakeholders. We extend our sincere thanks to every member that contributed data, and to BONARD for its research and analysis.

While the findings present a stark and candid assessment, Languages Canada remains committed to working with its members and partners to advocate for the changes needed to stabilize and rebuild Canada's English and French language education sector, support learners from Canada and around the world, and ensure that these essential programs can survive and recover.

Gonzalo Peralta
Executive Director
Languages Canada

Methodology

The core data in this report was collated from Languages Canada members. As of December 31, 2025, Languages Canada membership was composed of 161 Official Languages (English and French) programs. Of these, 160 members participated in the survey, which translates into a 98% response rate. Data collection was conducted online between April 2025 and May 2026.

The data presented in this report are based on information collected through two Languages Canada data collection initiatives: the new Term-Based Reporting Scheme, introduced in 2025, and the Annual Survey, conducted between March and May 2026.

This report provides an overview of the Official Languages education sector in Canada, and of international and domestic student enrolments (both in-person and virtual).

To maintain the confidentiality of individual member data, responses from Saskatchewan and Manitoba have been merged, as have responses from the provinces in the Atlantic region, in the Regional Overview section.

This research was carried out by BONARD, an independent market research provider with individual memberships in ESOMAR World Research. BONARD guarantees compliance with the ICC/ESOMAR International Code on Market Opinion and Social Research and Data Analytics.

Leveraging BONARD's data on global language travel, the study features a global overview of the English language market and an assessment of Canada's position in a global context.

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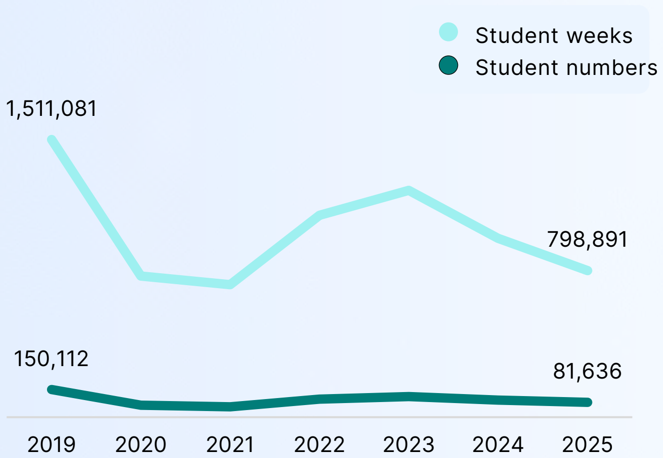
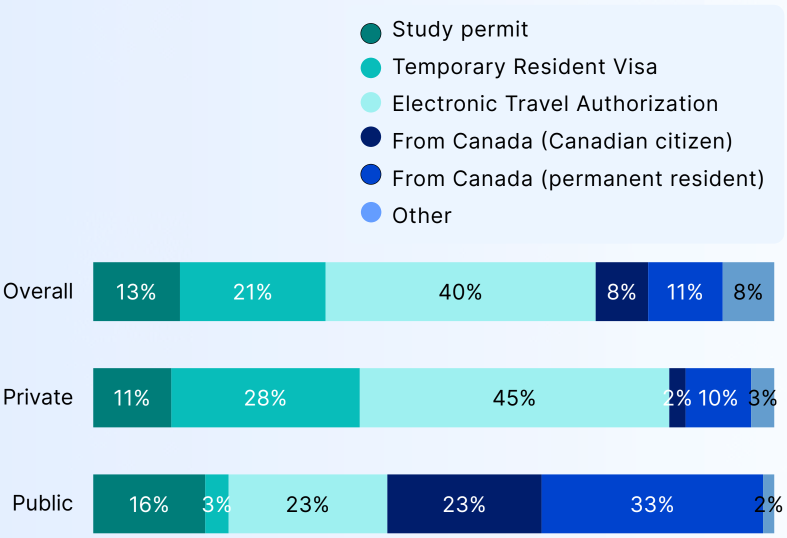


» **Based on data reported by 151 members in both 2024 and 2025, the sector experienced a year-over-year decline of 13% in student numbers, while student weeks decreased by 19%.**

93% International students (2025)	**92%** English language students (2025)	**77%** students enrolled in private programs (2025)
7% Domestic students (2025)	**8%** French language students (2025)	**23%** students enrolled in public programs (2025)

Student numbers by visa type (2025)



» In 2025, 40% of students entered Canada using an eTA, while 21% travelled on a TRV. At the same time, 13% of students entered Canada on a study permit.

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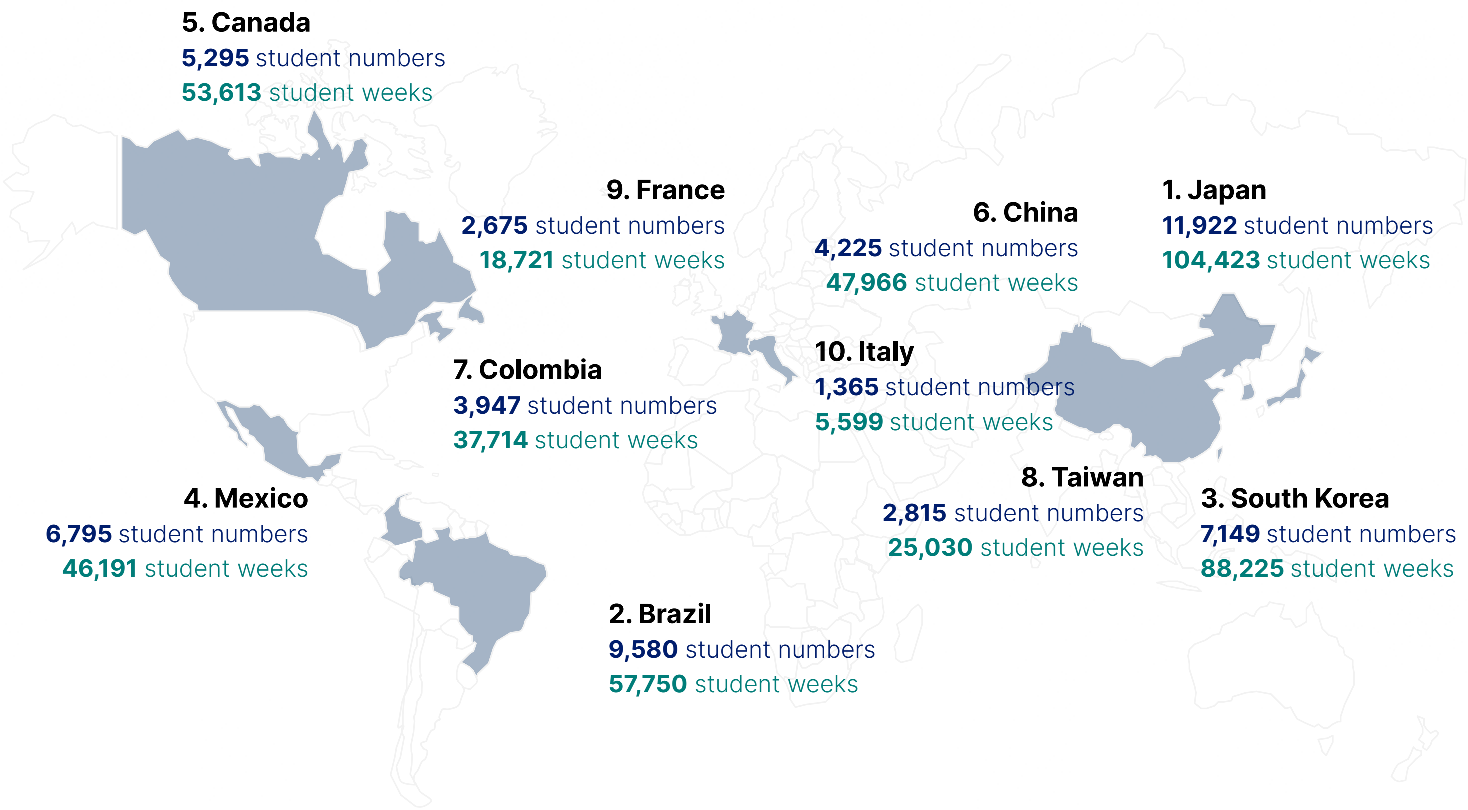
Top 10 source markets (2025)



$396
Average weekly tuition (2025)

$420
Average weekly income from accommodation fees (2025)

$1.03 billion
Direct economic contribution by Languages Canada members in 2025

-1%
Decline in direct economic contribution over 2024