

EXECUTIVE SUMMARY

The research constitutes the first 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 more than 210 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 2018, there were 352 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 (19%).

In total, 244 programs participated in the survey (all 214 accredited Languages Canada members as well as 30 non-member programs), which translates into an overall sector response rate of 69%. Cumulatively, these programs taught 166,847 language students. On average, students spent 10.5 weeks in their courses, generating a minimum of 1,660,203 student weeks. Of the total student population, 149,557 were international students. Based on the newly-acquired data, it was established that 88% of international students studied at Languages Canada member programs in 2018.

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) and the second most popular place to study French (after France).

Based on Languages Canada member data, the figures marked an increase of 6% in student numbers and 2% in student weeks respectively compared to the previous year. Growth was driven by public sector providers, who experienced a 21% year-on-year (y-o-y) increase in student numbers. Meanwhile, student weeks rose by 13%. Private sector programs welcomed 2% more language students, yet the volume of student weeks dropped by 2%.

The sector also represents an important pathway to other education sectors in Canada. The research shows that a total of 48,681 students (29% of all students) sought language preparation in order to continue on to post-secondary courses in Canada. Junior students continued to grow in absolute numbers. In 2018, the under-18 age group accounted for 18,408 students, representing 11% of all language learners in Canada (the same proportion as in 2017).

Study permit holders represented just above 25% of the market. However, they were concentrated in the public sector, where they encompassed 56% of all students. Most students entered Canada to study a language as visitors (39%).

The most popular course duration was revealed to be between 4 and 12 weeks (46%). As many as 22% 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 5% of the student population at public institutions and 27% at private language programs.

From a regional perspective, the two most popular provinces – Ontario and British Columbia – accounted for 79% of all students. Y-o-y performance varied across Canada. While British Columbia (+4,172) and Ontario (+3,491) were the biggest gainers in absolute numbers, the province of Alberta (-411) faced a dip in student numbers.

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Most students came from Asia (41%), followed by Latin America (32%). Asian students also accounted for the majority of student weeks (52%). Representing 11% of all language learners, Europe constituted the third most important source region for Canada.

The top source markets in 2018 were Brazil (27,815 language students), Japan (21,333), China (18,534), Mexico (14,206) and South Korea (14,071). All but South Korea (-6%) posted positive y-o-y growth. The fastest-growing source country in 2018 was Vietnam, which grew by 62% and consequently jumped from tenth to seventh position. Canada in itself is also a considerable market. In 2018, 13,622 students were Canadians, making it the sixth most common nationality at language programs in Canada.

From a global market share perspective, Canada performed well in Asian and Latin American countries in 2017 (the latest statistically closed year), with the highest share in Mexico (where it accounted for 51% of all student weeks), South Korea (32%) and Vietnam (25%). Canada also claimed a strong share in Brazil (18% of all student weeks) and Turkey (17%).

The preferred method of booking a language course in Canada was through education agents (58%). The second most popular booking channel was through direct bookings (21%). Walk-ins represented 10% and 7% of language learners were enrolled through institutional agreements. A further 3% came to Canada via government scholarships.

The French language segment welcomed 18,136 students. Domestic students represented 52% of all French language learners in Canada. Internationally, the top source markets were Brazil (983), China (953), Mexico (951), and the USA (933). French programs were less reliant on agency bookings than English language providers (34% of bookings were through agents).

The sector employed a minimum of 8,350 staff with almost 50% of the workforce being engaged in full-time positions. Moreover, the teacher to support staff ratio equalled 1 : 0.5.

Challenges faced by language programs were cited as competition, both domestic (57%) and international (42%), as well as student visa refusals (55%) and visa processing times (42%). More than a third of programs were also concerned by HR-related issues.

Of 4,657 refused visas reported by responding programs, the countries with the highest number of visa refusals in 2018 were Brazil, China and Turkey.