Executive Summary

This year's edition of the report provides a comprehensive assessment of the 2022 market landscape and outlines implications for the 2023 outlook.

» Market Overview

In 2022, Languages Canada members taught a total of 97,679 students, who cumulatively spent 1,098,558 weeks studying English or French in Canada.

Despite significant growth from 2021 numbers, the volume has not yet reached pre-pandemic levels. Members recovered 65% of their pre-pandemic student numbers and 73% of student week volume.

English language programs enrolled 95% of all students and accounted for 96% of all student weeks.

Between 2021 and 2022, student numbers in the private sector recovered faster than student weeks (+98% vs +77%). At the same time, a 10% decline in the number of public sector students was accompanied by a 6% drop in student weeks.

By the end of 2022, the public sector had recovered 40% of its pre-pandemic student numbers and 40% of student weeks, while the private sector had recovered 73% of student numbers and 89% of student weeks.

The overall average study duration in 2022 was 11.2 weeks, which was still slightly longer than in 2019 (10.1 weeks).

The most popular course in 2022 remained General English/French, attracting 65% of students studying in Canada. Pathway programs leading to a degree, diploma, or certificate at a university or college replaced English/French for Academic Purposes as the second most popular option. Pathway programs accounted for 17% of students.

Ontario welcomed 42% of all English and French students in Canada (an increase from 37% in 2021). The second most popular province was British Columbia, with a 36% share, followed by Quebec, with 13%. Statistics demonstrate that the pace of recovery across provinces was uneven. While Ontario recovered 46% of its 2019 student number volume, Quebec and British Columbia recovered 60% and 52%, respectively.

» Student Demographics

In 2022, the fastest-growing visa category was the visitor visa (from 5,276 to 29,727). Challenges related to visa processing hampered travel plans for a minimum of 9,709 students.

Course duration preferences remained unchanged since 2019. Half of students (50%) enrolled on courses lasting between 4 and 12 weeks.

» Source Markets

In 2022, South America was the top source region for Languages Canada members, accounting for 42% of all students. The number of students from this region doubled from 2021. Furthermore, it outpaced Asia, which showed a more modest increase between 2021 and 2022 (+60%).

Japan was the top source market in 2022, experiencing a 95% year-on-year growth. Brazil and Mexico, in second and third positions, respectively, saw a surge in student numbers. 12,372 students came from Brazil, a considerable increase from the 4,326 in 2021. A total of 11,754 students from Mexico studied English or French in Canada in 2022.

Of the top 20 source markets, five have already exceeded pre-pandemic student numbers. Except for Brazil and Mexico, all top source markets from South America have already exceeded their pre-pandemic volumes: Colombia (176%), Chile (215%), Peru (256%), and Ecuador (215%).

European markets, albeit much smaller in volume than leading Asian and South American markets, also experienced a significant rebound in student numbers. Of these, France had the greatest rebound of student numbers, reaching 84% of 2019 volume. At the other end of the spectrum, the lowest recovery level was seen in Turkey at 45%.

» Sector Recovery

2022 marked another significant step in the return to face-to-face delivery: 62% of student weeks were delivered as part of in-person classes (as opposed to 29% in 2021).

Cumulatively, Languages Canada members received $4.9 million in government support in 2022.

Overall, Languages Canada members employed a minimum of 4,941 staff in 2022. After a significant drop in workforce capacity in 2020 (members lost 57% of their staff) and a slow rebuild in 2021, the number of teaching staff employed increased by 29% in 2022. This represents 49% of teaching capacity in 2019.

Hiring plans are more ambitious than they were last year. While in 2021 26% of programs were not planning to hire any new employees, in 2022 most responding members expressed their intention to recruit new staff members in 2023, with 63% planning to hire between one and three employees and 25% planning to hire between four and seven.

» Focus on French Programs

Languages Canada members that offer French language courses saw another year of growth after 2020. Student numbers grew by 16% and student weeks grew by 28% between 2021 and 2022. In 2022, French sector reached 52% of its pre-pandemic student number volume.

Student numbers from Canada decreased from 1,596 in 2021 to 1,099 in 2022, while the number of international students showed the opposite trend.

Overall, half of all French language students came using a visitor visa. The second biggest group (22%) was composed of Canadian citizens, while 14% of students used study permits.

Most students enrolled as individuals; however, 19% of students enrolled as part of groups in the French private sector.

The most popular course duration for French language students was between 4 and 12 weeks.