

Canada's Position in the Global ELT Market: Insights, Challenges, and Future Outlook

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About BONARD

Empowering progress.

Established in 2007, BONARD Education is an independent market research and strategic development firm specialising in international education.

We accompany education providers, associations, governments, and investors on their journey to make international education a transparent, thriving, and transformative industry.



Our team.

 **4** Offices

 **91** Specialists

 **623** Projects conducted

Industry memberships and affiliations.

Clients and partners.

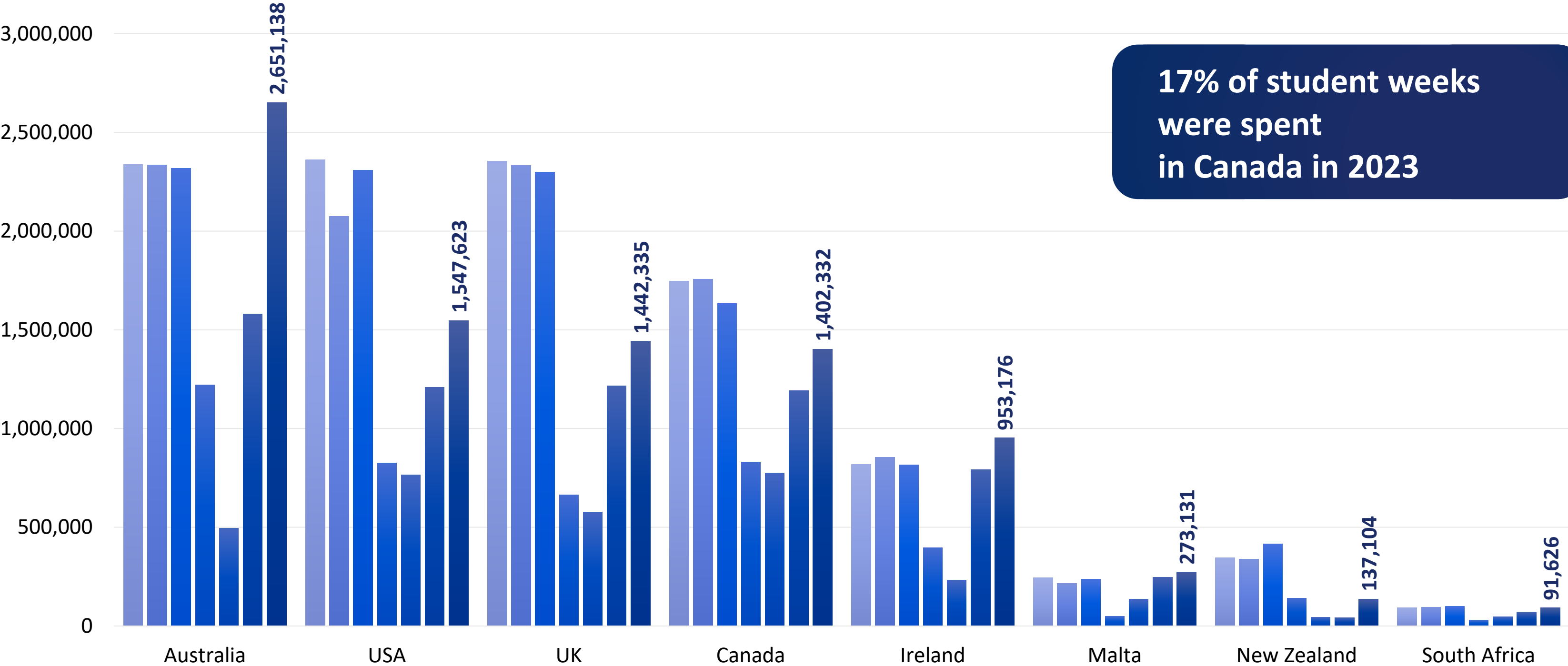
             

Student weeks by destination

STUDENT WEEKS

2017 2018 2019 2020 2021 2022 2023



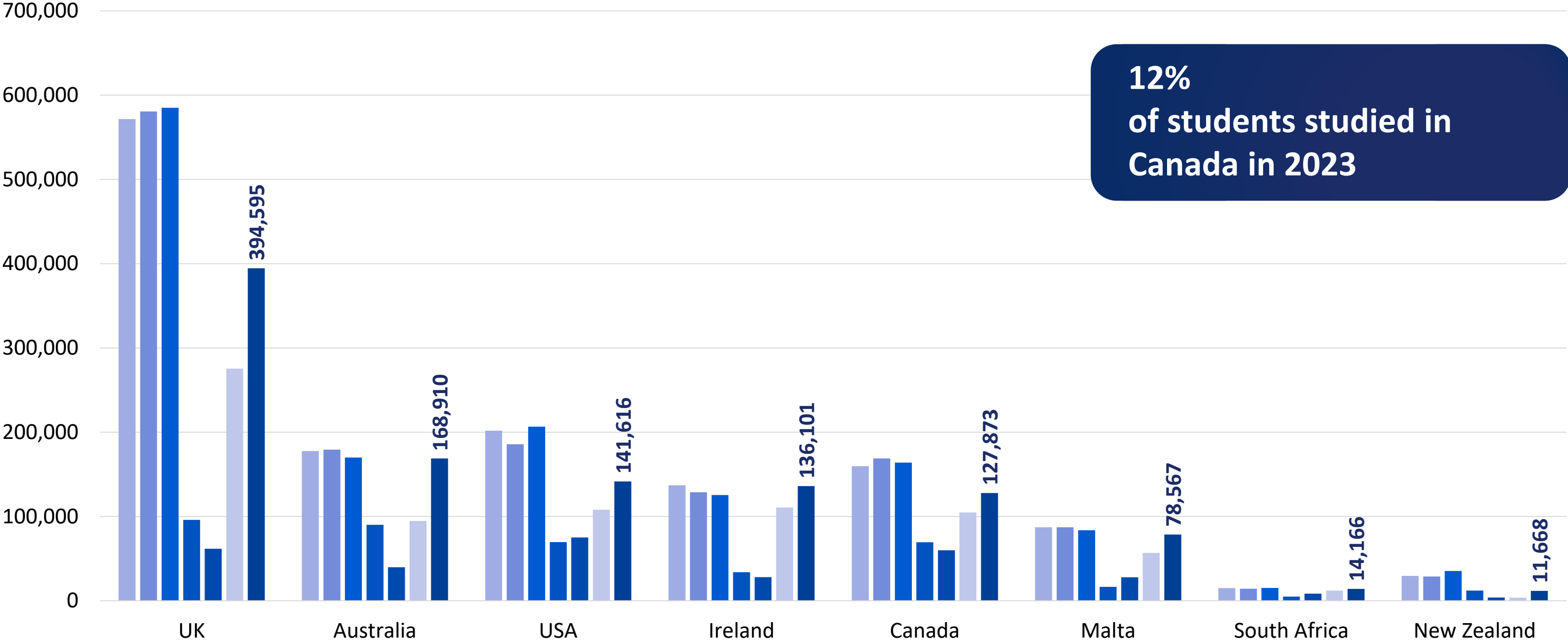
17% of student weeks were spent in Canada in 2023

Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

Student numbers by destination

STUDENT NUMBERS

● 2017 ● 2018 ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



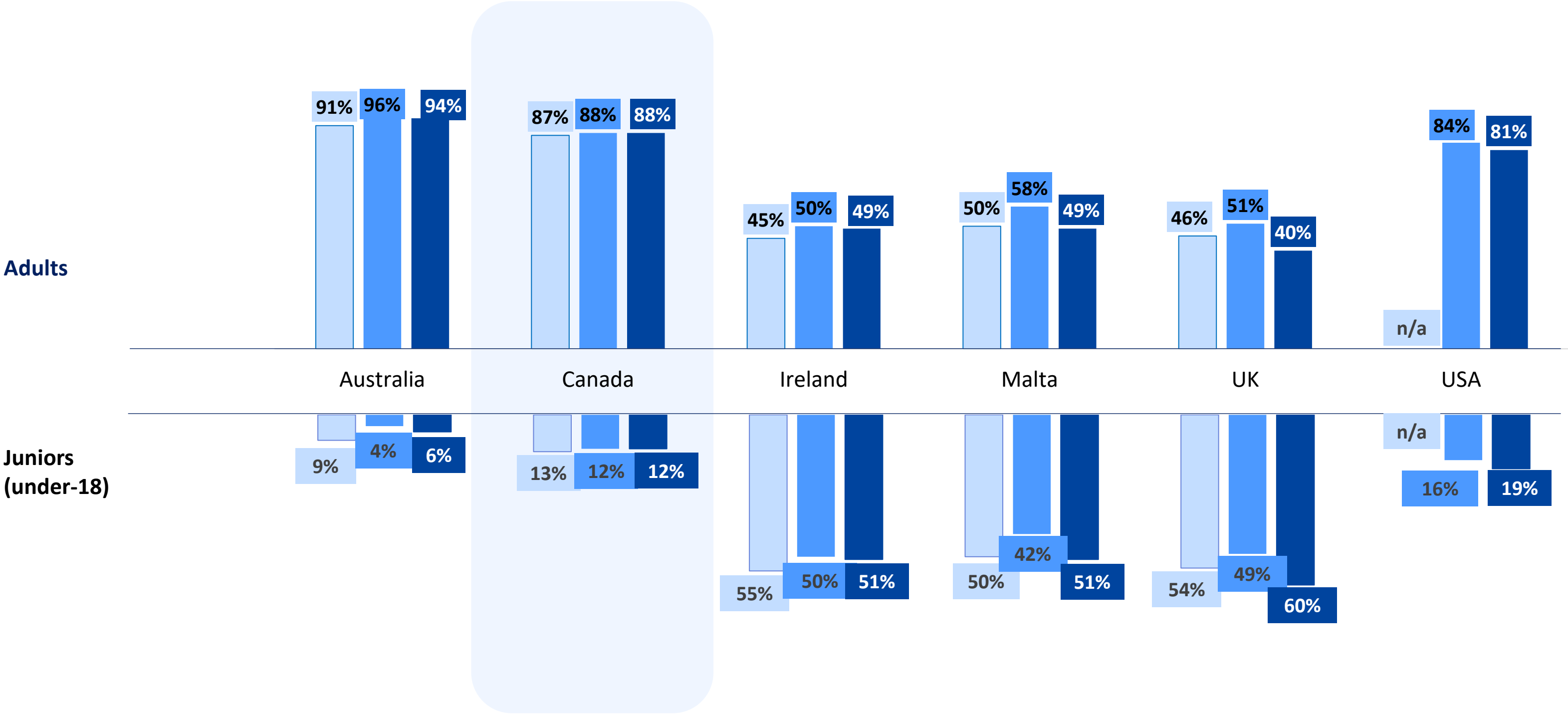
12%
of students studied in
Canada in 2023

Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

Adult to junior ratio evolution

STUDENT NUMBERS

2019 2022 2023

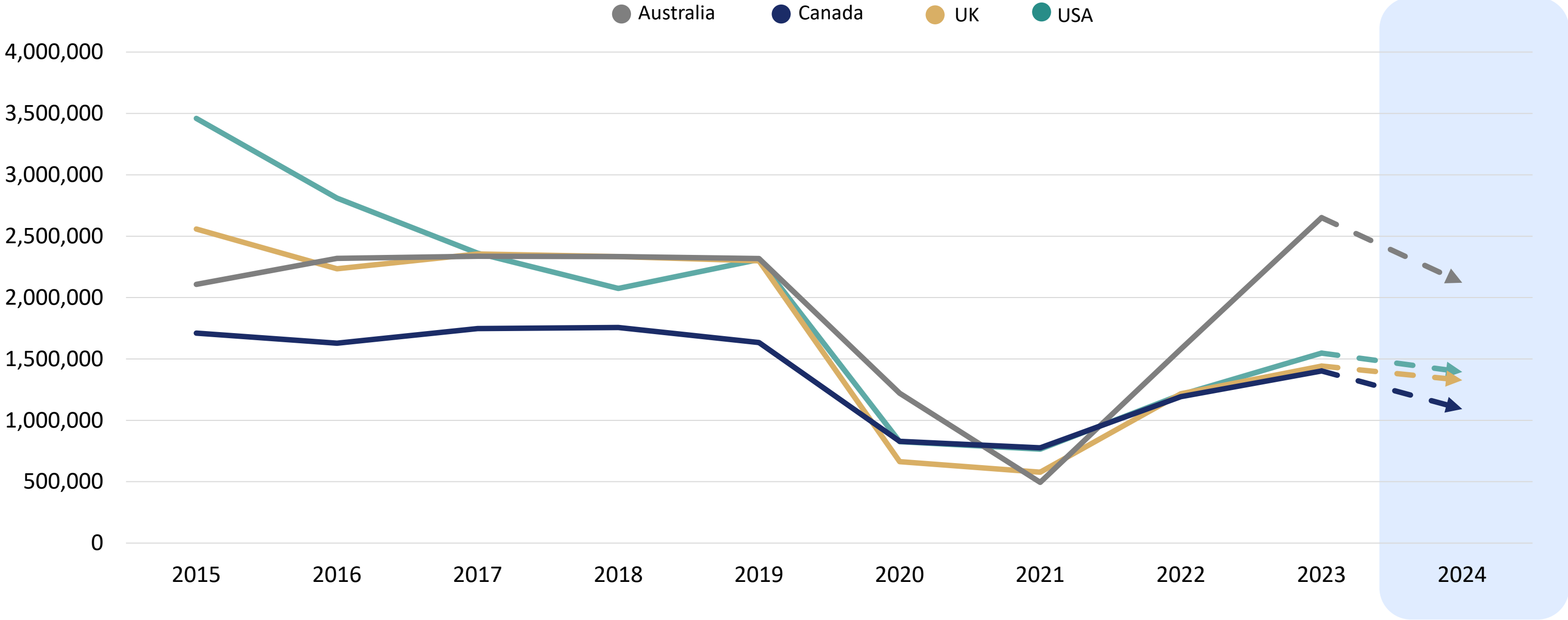


Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English UK, EnglishUSA, BONARD, 2024

Student weeks by destination – forecast

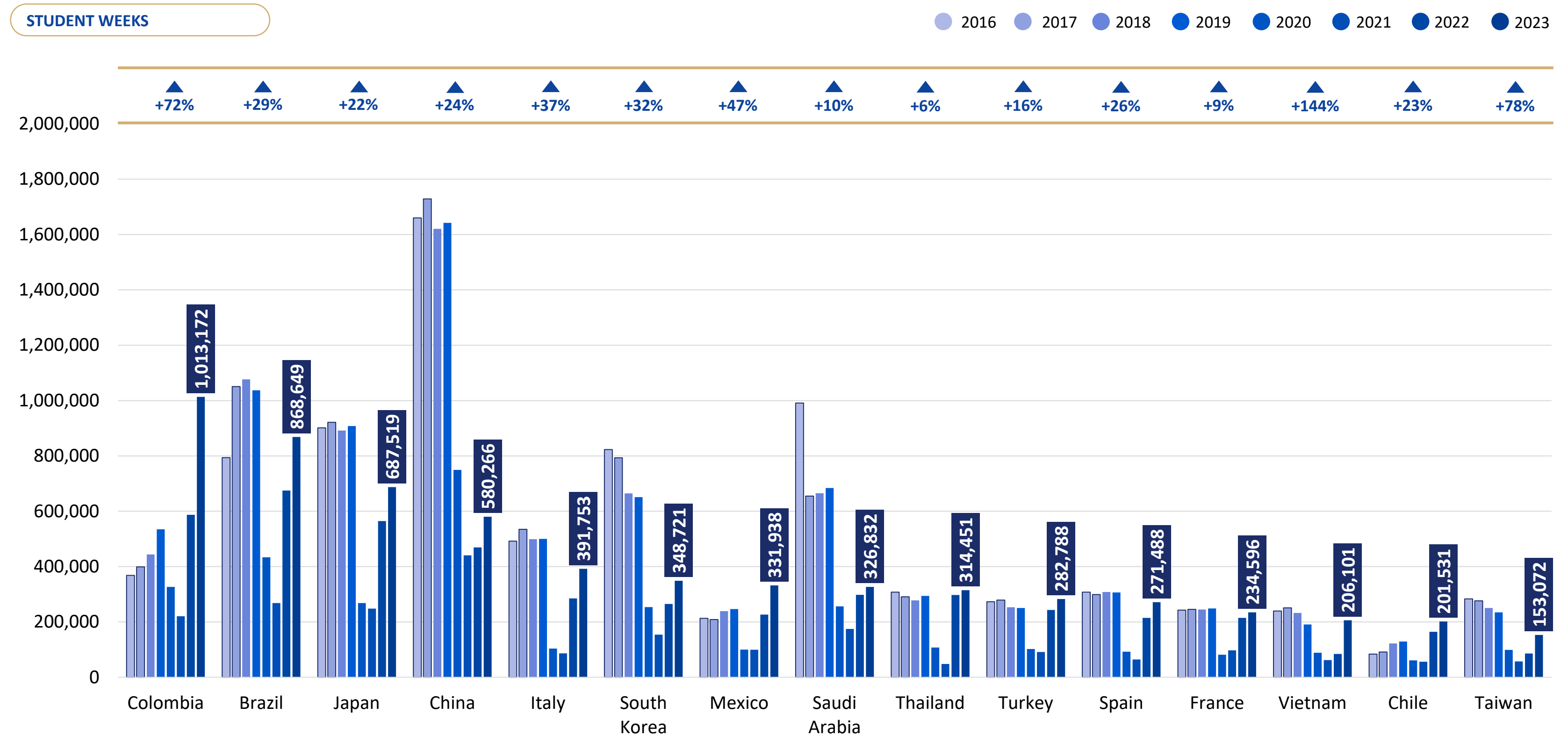
STUDENT WEEKS

Mathematical calculation



Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

Top 15 source countries and y-o-y change

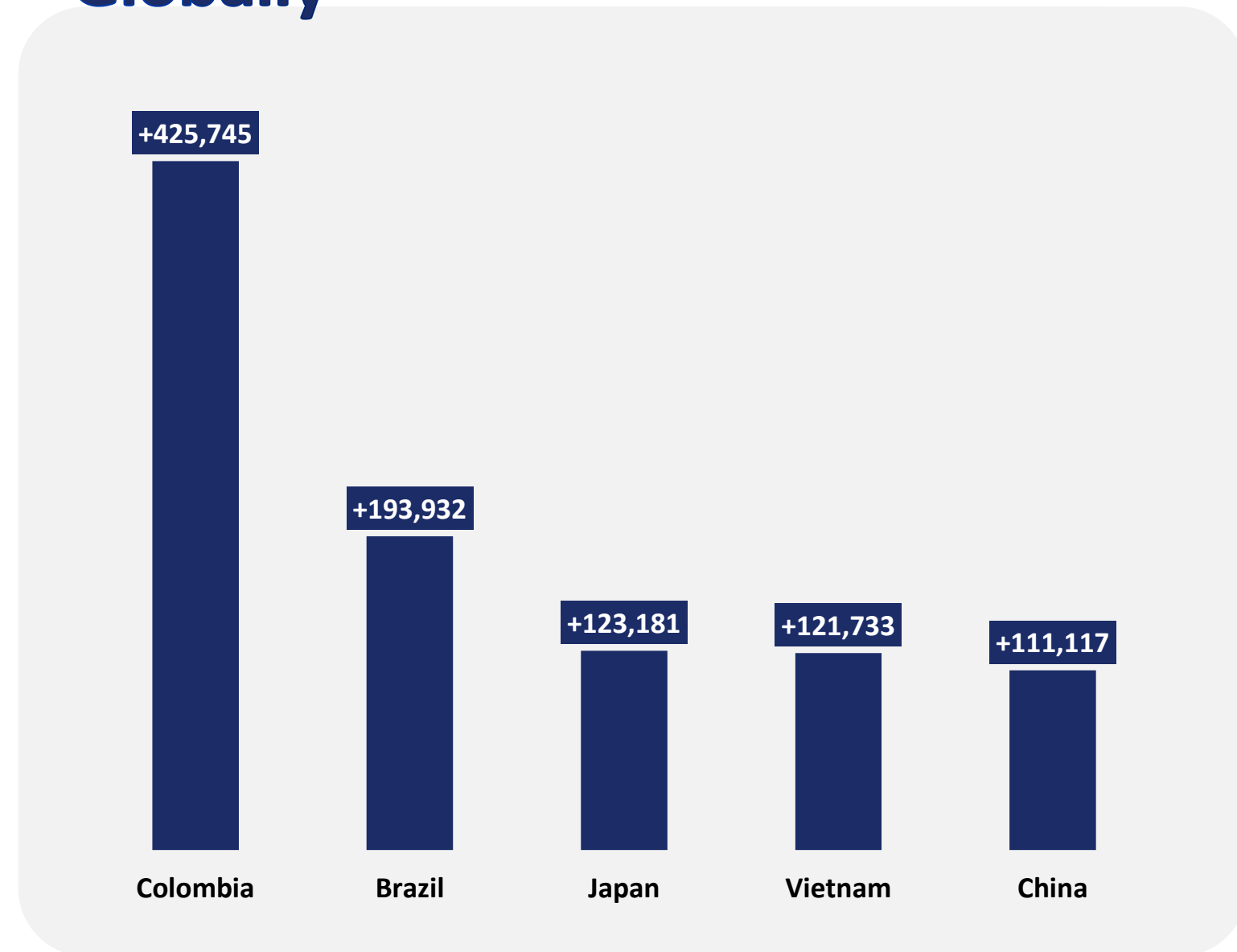


Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

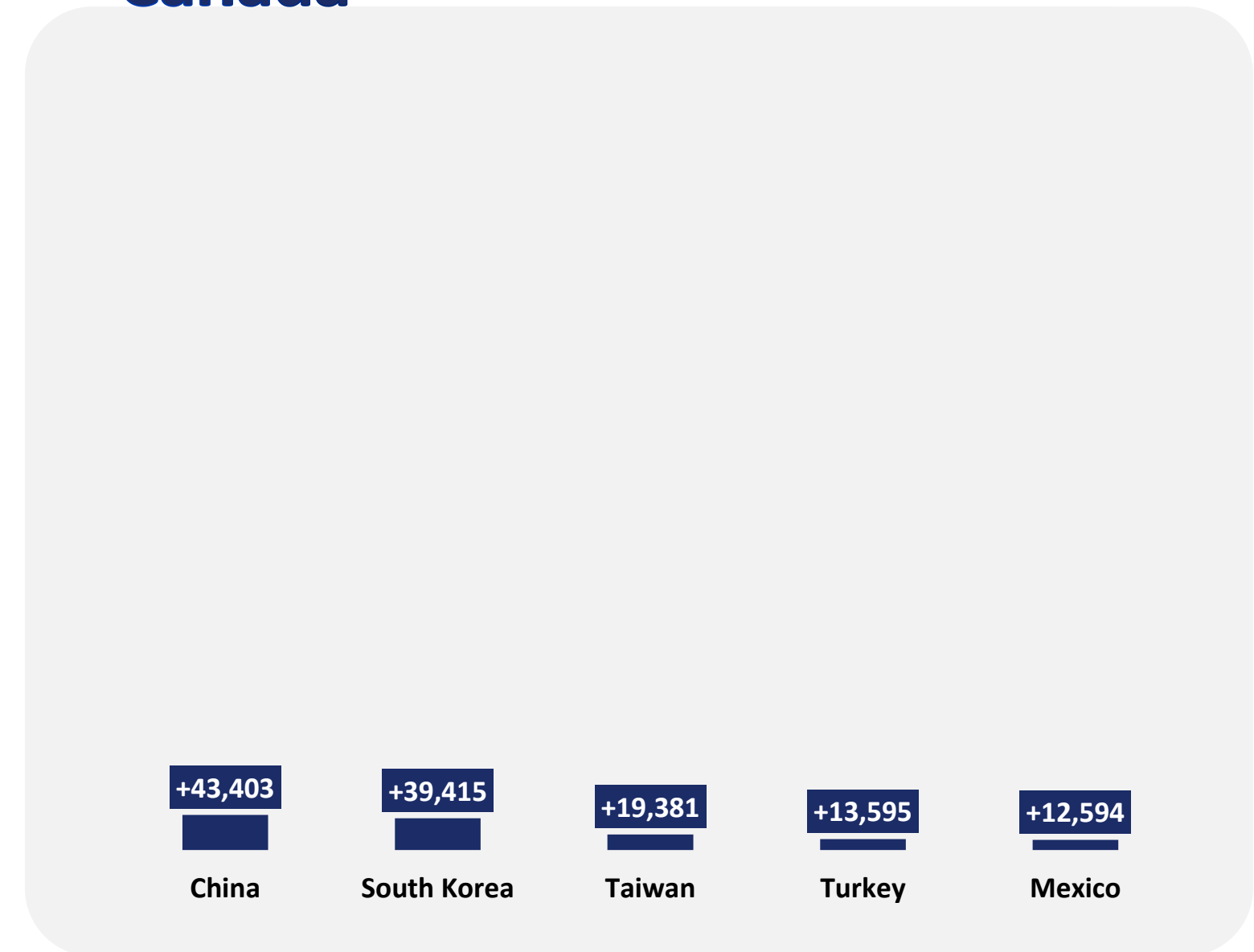
Top 5 growing markets (2022 vs 2023)

STUDENT WEEKS

Globally



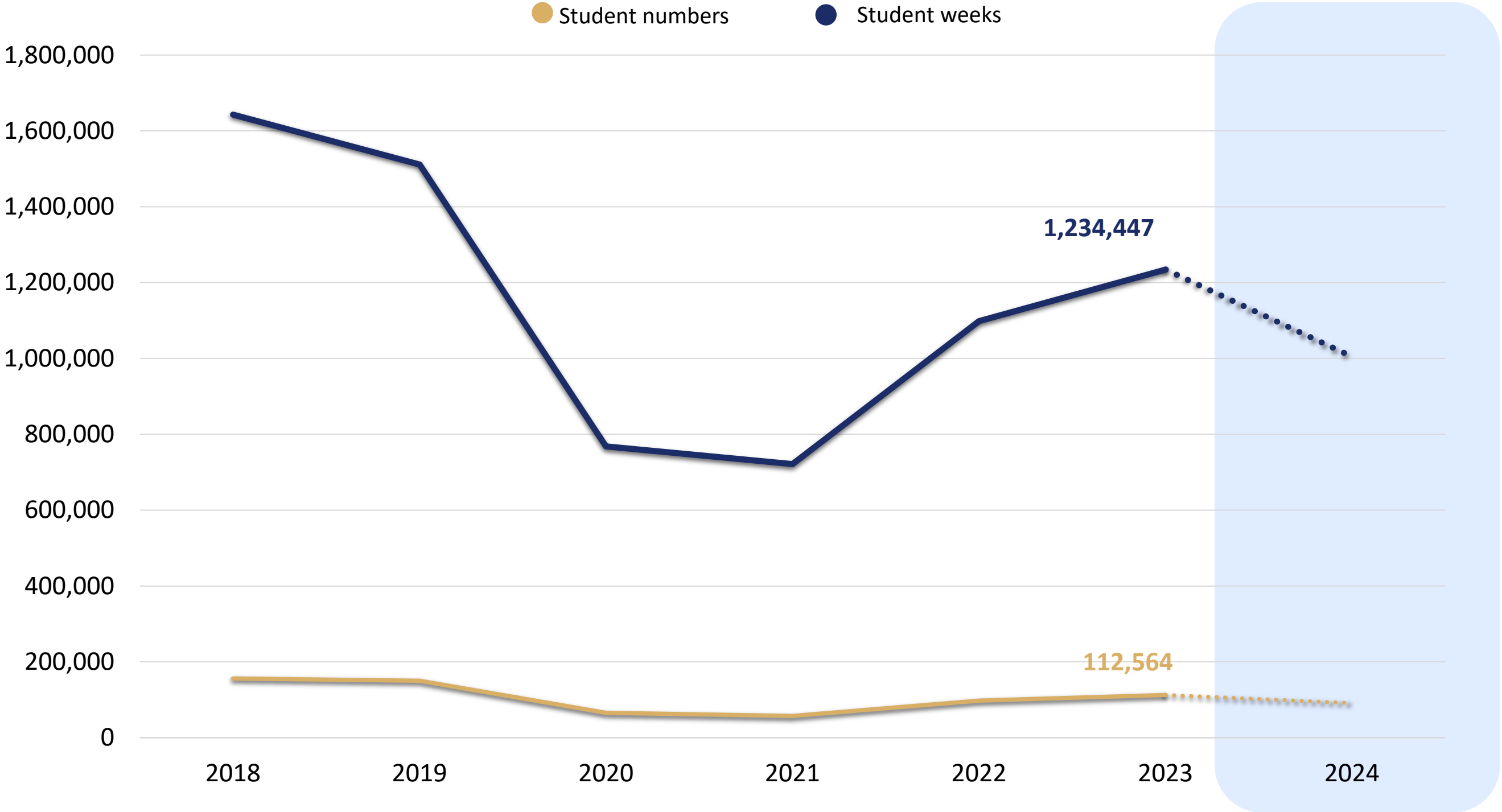
Canada



Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

Note: Figures represent the percentage of 2023 student week volume as compared to 2022.

Canada: 2024 Market overview projections



15-20%
drop in student numbers

19%
drop in student weeks

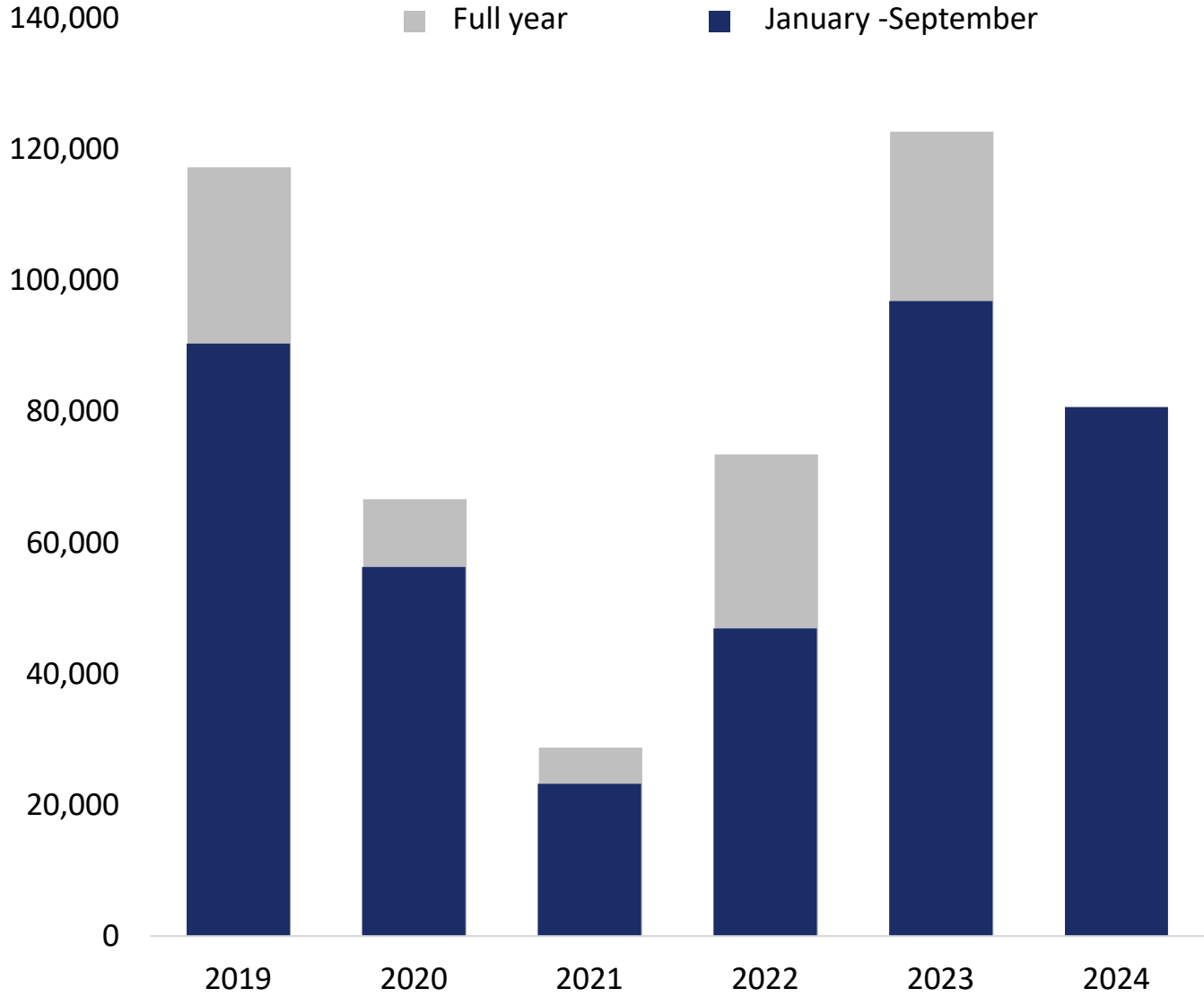
15%
Share of junior students

Source: Languages Canada & BONARD, 2024

2024 Market overview: Australia and the UK

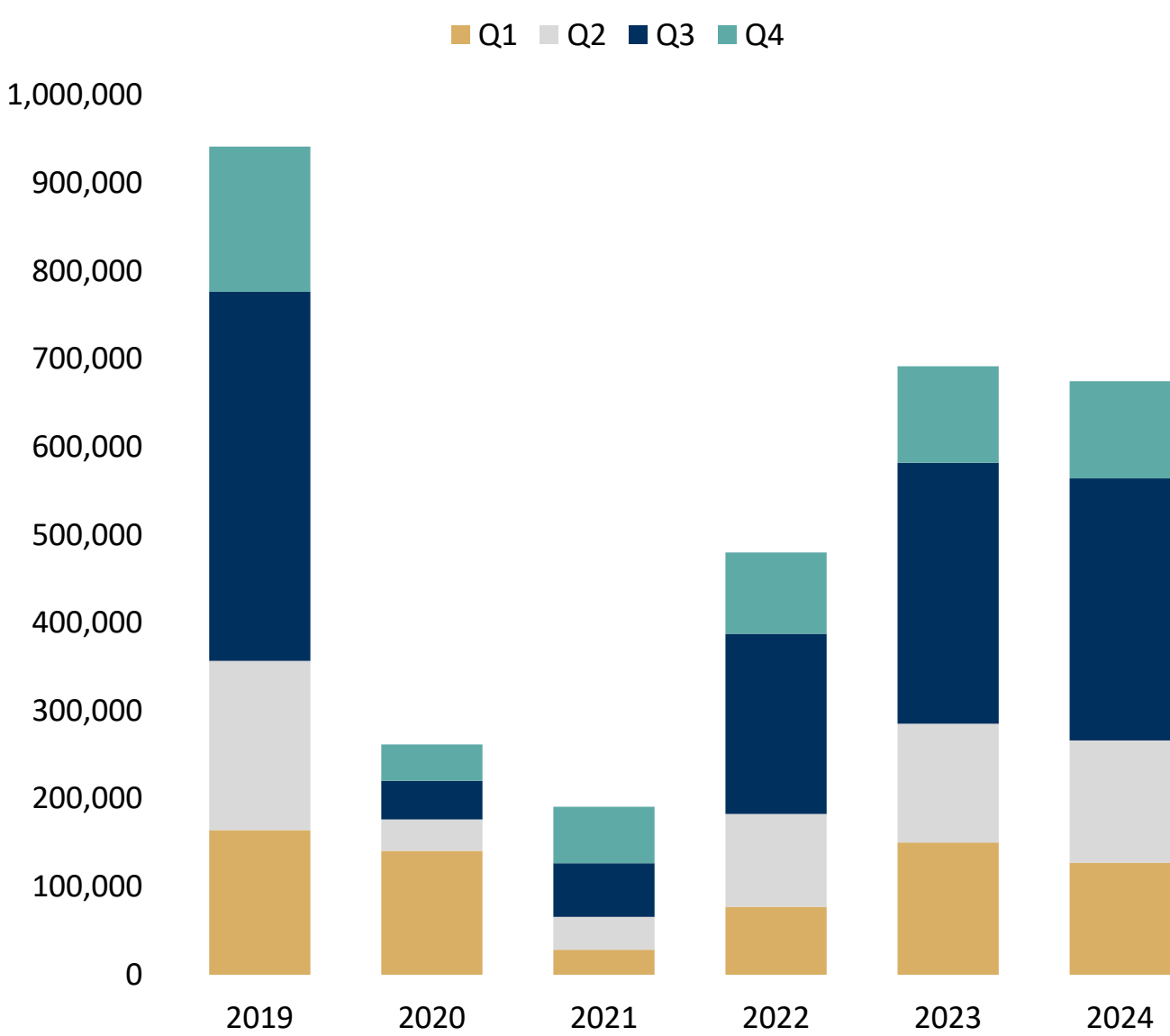
STUDENT NUMBERS

Australia



STUDENT WEEKS

UK



Source: Australian Government Department of Education, 2024; English UK Quarterly Intelligence Cohort, 2024

Canada: Top source markets (private sector)

		LC Quarterly Reporting Scheme data				
2023 (Annual Report)	2024	Q1 2024	Q2 2024	Q3 2024	Q4 2024	
Japan	Brazil	-5%	-7%	+12%	-11%	
Mexico	Japan	-24%	-16%	-2%	+24%	
Brazil	South Korea	23%	+8%	+11%	+20%	
China	Mexico	0%	-45%	-21%	-23%	
South Korea	Colombia	-31%	-40%	-25%	-1%	
Colombia	Taiwan	-4%	-12%	+11%	+9%	
Canada	France	-44%	-8%	+15%	+58%	
Taiwan	Italy	-8%	-52%	+5%	+19%	
France	Turkey	+39%	-30%	-36%	-47%	
Turkey	China	-26%	-25%	-3%	-17%	

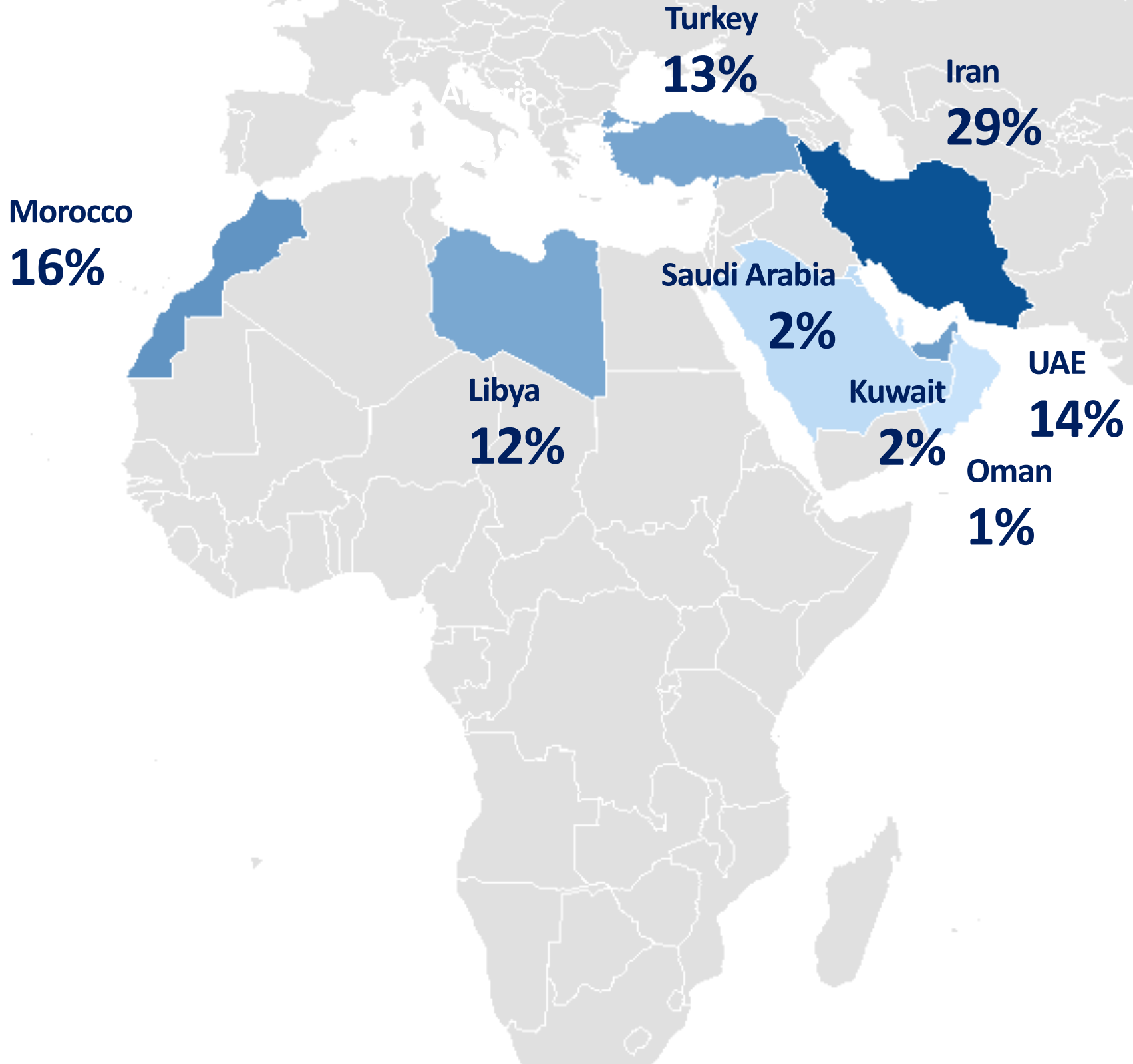
Source: Languages Canada & BONARD, 2024

Canada: Top Source markets by course type (private sector, 2024)



Source: Languages Canada & BONARD, 2024

MENA: Canada's market share in top markets (2023)

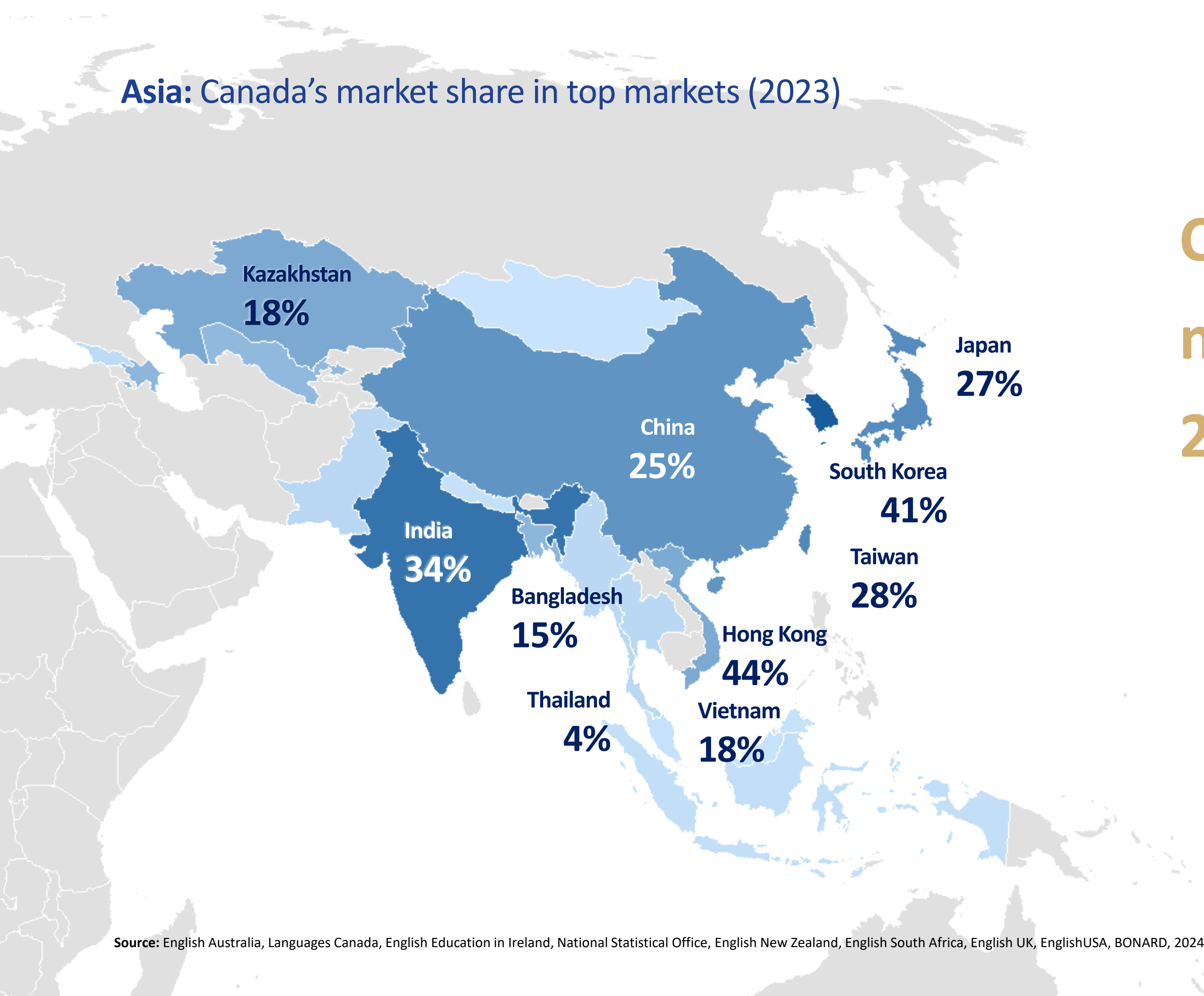


Canada's
market share
7%

Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

Asia: Canada's market share in top markets (2023)

Canada's
market share
22%

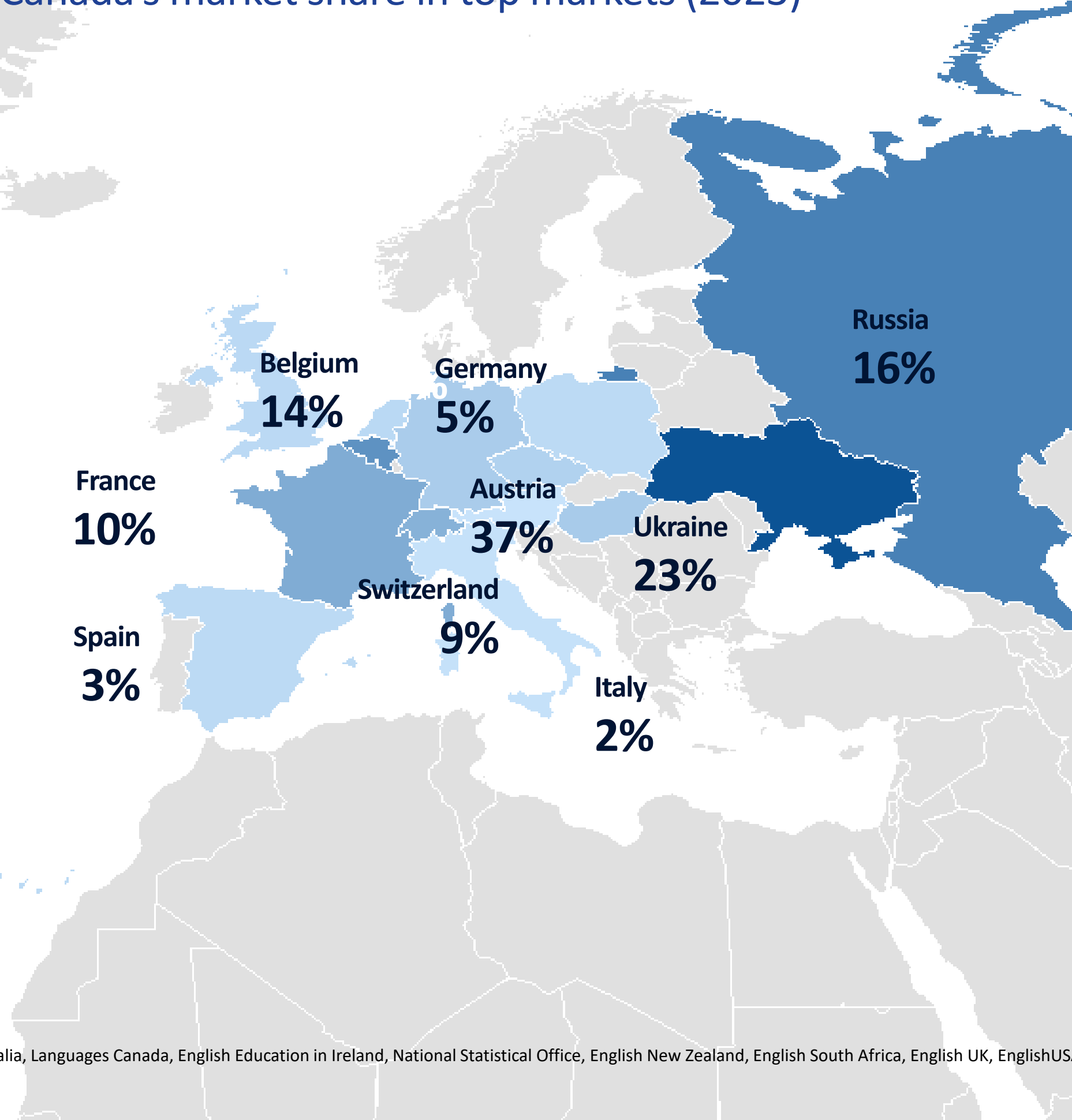


LATAM: Canada's market share in top markets (2023)



**Canada's
market share
15%**

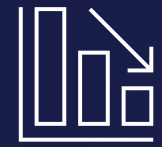
Europe: Canada's market share in top markets (2023)



Canada's
market share
6%

Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2024

2025 and Beyond



Challenging outlook for English language student mobility



Shift to alternative destinations



Opportunities in the junior market



Sector consolidation



Students are using visas other than student visas (where available), potentially impacting average course duration



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2024 Annual Survey is Open

Please submit your data by **February 28**

In case of questions please contact us at canada@bonard.com

Access the survey



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