



Canada's Official Languages Programs 2023 Annual Survey Report

Executive Summary

May 2024

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Canada's Official Languages Programs 2023 - Annual Survey Report

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Prepared on behalf of:



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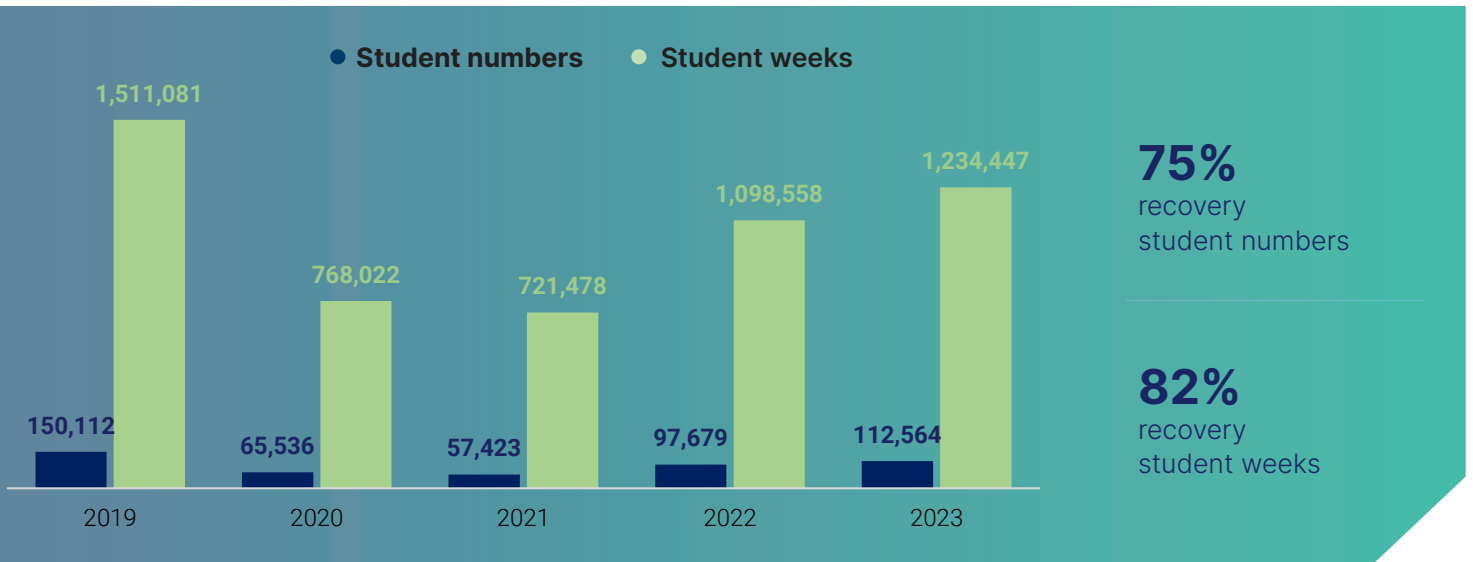
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- In 2023, Languages Canada members hosted a total of 112,564 students – 105,377 international and 7,187 Canadian – who cumulatively spent 1,234,447 weeks studying English and/or French in Canada. The overall average course duration in 2023 was 11 weeks.
- In 2023, the number of students in French language programs in Canada grew by 59% over 2022, while student numbers in the English language sector rose by 13%.
- Between 2022 and 2023, both student numbers and student weeks in the public sector increased for the first time since the pandemic, growing by 60% and 44%, respectively.
- In 2023, the fastest-growing visa category was the Temporary Resident Visa (TRV). The number of students entering Canada through the TRV route increased from 8,559 in 2022 to 16,588 in 2023, surpassing pre-pandemic levels. The number of students on study permits, on the other hand, decreased from 17,191 in 2022 to 15,990 in 2023 due to visa processing issues and refusals.
- In 2023, 42 source markets experienced year-on-year growth, 26 of which surpassed their pre-pandemic figures. Japan secured the top position, with a 16% year-on-year growth and a recovery rate of 82%.
- Mexico outperformed Brazil and ranked as the second largest source market, recovering 91% of its 2019 student numbers. Third-ranked Brazil sent 12,566 students in 2023, achieving a 55% recovery rate.
- Education agencies remain the primary booking channel for Languages Canada members, generating 63% of all bookings in 2023.
- Overall, Languages Canada members employed a minimum of 4,781 staff in 2023, which represents 160 fewer employees than in 2022.
- The average weekly tuition fee stood at \$348, an increase of \$25 compared to 2022. This represents an 8% year-on-year increase. Additionally, the average weekly income from accommodation fees increased by \$45, growing from \$297 in 2022 to \$342 in 2023.
- In 2023, homestay was the most popular type of accommodation, and was used by 58% of all students. It was the predominant choice in both the private and public sectors.

Focus on French Programs

- Reporting members welcomed 8,601 students and taught a total of 69,421 weeks in 2023.
- In 2023, the French sector in Canada recovered 83% of its 2019 student numbers and 85% of its student weeks volume.
- In 2023, the largest international student source market for French language programs was Mexico, which sent 1,605 students (up from 1,036 in 2022).
- Furthermore, the number of Canadian students enrolled in French language courses rose by 30%, from 1,099 in 2022 to 1,433 in 2023.

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94%
International students

92%
English language students

83%
students enrolled in private programs

6%
Domestic students

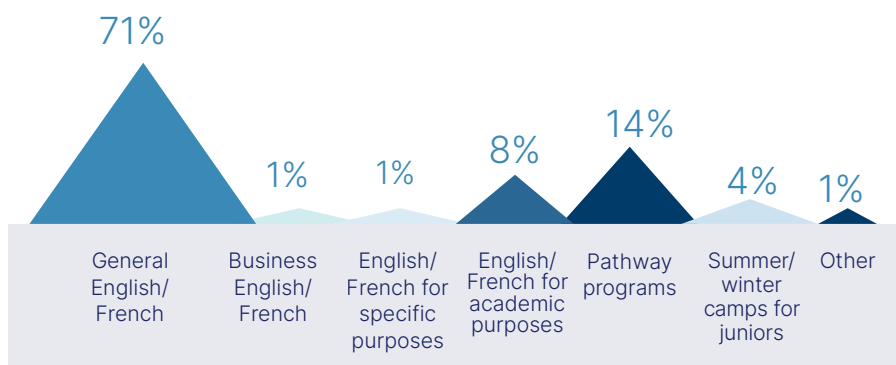
8%
French language students

17%
students enrolled in public programs



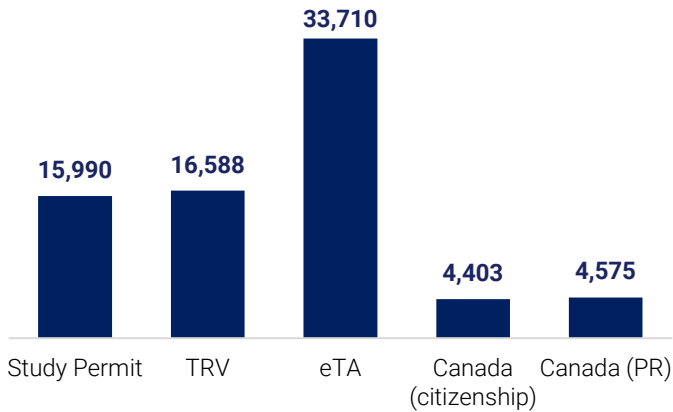
At the end of 2023, the private sector had recovered 83% of its pre-pandemic student numbers and 91% of its student weeks. In the public sector, recovery rates stood at 57% for student numbers and 63% for student weeks.

Student numbers by course type (2023)



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Student numbers by visa type (2023)



Among the top 20 source markets, six have already exceeded 100% of their 2019 student numbers.

All the top source markets in South America have surpassed their pre-pandemic student numbers, except Brazil and Mexico: Colombia (164%), Chile (213%), Peru (275%), and Ecuador (271%).

\$348

Average weekly tuition (2023)

\$342

Average weekly income from accommodation fees (2023)

\$1.19 billion

Direct economic contribution by Languages Canada members in 2023

+30%

Increase in direct economic contribution over 2022

Top 10 source markets (2023)



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