Languages Canada
Langues Canada

Canada's Official Languages Programs 2024 Annual Survey Report

EXECUTIVE SUMMARY

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BONARD

Canada's Official Languages Programs 2024 - Annual Survey Report (Executive Summary)

Prepared on behalf of:

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Foreword

As Canada continues to navigate an increasingly complex global environment, the importance of language education as a foundation for inclusion, economic growth, and international engagement has never been greater. At a time when restrictive national policies and uncertainty are placing undue pressure on language education providers, the very future of Canada's official languages sector—and what it represents for the country—is at risk. In the face of mounting economic challenges, questions around national identity, and declining productivity, it is essential that we continue to rely on official languages as a cornerstone of our culture, our unity, and our ability to thrive as a society.

The 2024 Annual Survey Report offers a critical snapshot of the state of Canada's official languages education sector, highlighting both its resilience and the urgent challenges it faces. In a year marked by significant policy shifts and intensified global competition for international students, Languages Canada members remained steadfast in their mission to deliver high-quality English and French language programs. This report documents not only enrolment trends and student demographics, but also the economic contribution of our sector, the evolving needs of our learners, and the impact of federal immigration decisions on institutional sustainability and student mobility.

The data reveals areas of both growth and concern: while total student numbers and weeks declined from the previous year, the demand for French language courses grew, and new markets showed emerging promise. Members adapted through flexible delivery modes, innovative recruitment strategies, and deeper collaboration, all while continuing to deliver life-changing learning experiences to tens of thousands of students from across Canada and around the world.

Languages Canada remains committed to advocating for policies and practices that support a vibrant, accessible, and future-oriented language education sector. This is not only a commitment to the sector itself, but to Canada's broader goals of modernizing our identity and supporting our educational systems, workforce, and social fabric in all their evolving needs. I would like to thank the Languages Canada staff for their collaborative approach in getting this report ready and to the team at Bonard for their expertise, integrity, and diligence. I am also grateful to our members for their continued engagement in this annual survey and for their daily commitment to building a more linguistically inclusive, globally connected Canada.

Gonzalo Peralta
Executive Director
Languages Canada

Methodology

The core data in this report was collated from Languages Canada members. As of December 31, 2024, Languages Canada membership was composed of 180 Official Languages (English and French) programs. Of these, 176 members participated in the survey, which translates into a 98% response rate. Data collection was conducted online between January and March 2025.

This report provides an overview of the language education sector in Canada, and of international student enrolments (onshore and offshore).

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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- In 2024, participating Languages Canada members welcomed a total of 92,529 students studying official languages, who collectively accounted for 974,710 student weeks.
- The average course duration per student saw a slight decline, decreasing from 11 weeks in 2023 to 10.5 weeks in 2024.
- The English Language Teaching sector experienced a 17% decrease in student numbers year-over-year, based on like-to-like comparison In contrast, the French language sector grew by 14%, bolstered by more favourable visa policies for Francophone students.
- The overall decline in student numbers was largely driven by the adult segment, which saw a 13% year-over-year decrease. In comparison, the junior segment was more resilient, posting a smaller 9% decline.
- General English/French programs remained the most popular choice, attracting 76% of total enrolments, up from 71% in 2023. Pathway program enrolments saw the most significant decline, dropping by 56% and representing just 8% of total student enrolments.
- Languages Canada member institutions employed a minimum of 4,669 staff in 2024, of whom 62% were teaching staff, reflecting the sector's strong focus on educational delivery.
- Homestay remained the most popular accommodation option across both the private and public sectors. In 2024, 58% of students in the private sector and 47% in the public sector chose this living arrangement.

French Sector

- In 2024, 7,802 students studied French through Languages Canada members, generating 83,116 student weeks. This increase was driven by a longer average course duration, which rose from 8.1 weeks in 2023 to 10.7 weeks in 2024. Overall, the French sector recorded a 14% increase in student numbers and a 43% rise in student weeks.
- The domestic Canadian market emerged as the largest source for French-language students, accounting for 27% of total enrolments. Mexico (16%) and Colombia (8%) followed as key source countries.

Public Sector

- In 2024, public sector members welcomed 19,399 students studying official languages, who contributed 372,055 student weeks. The average course duration continued to rise, reaching 19.2 weeks, up from 16.6 weeks in 2023 and 4.9 weeks in 2019—signaling a sustained preference for longer-term studies.
- Asia remained the largest source region, contributing 58% of all public sector enrolments. It was also the only region to record growth in student numbers, led by increases from China (+473 students), South Korea (+343), and Japan (+155).

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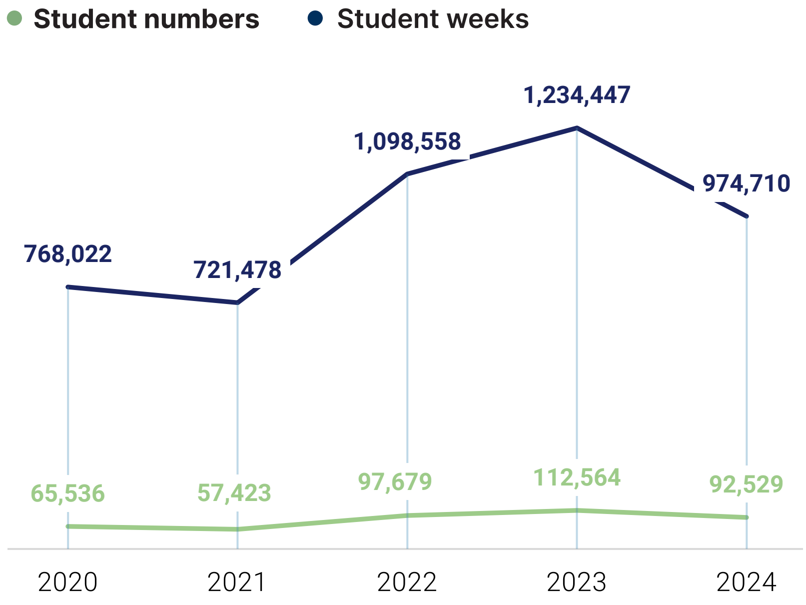
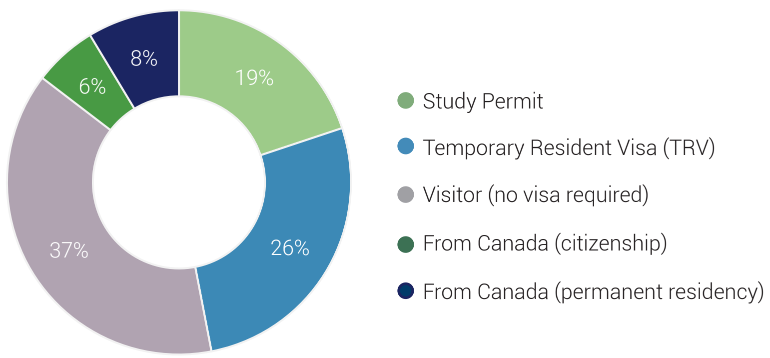


» Based on data from members participating in both 2023 and 2024, the sector experienced a 15% decline in the number of students learning English or French, along with an 19% drop in total student weeks over the two years.

94% International students (2024)	**92%** English language students (2024)	**82%** students enrolled in private programs (2024)
6% Domestic students (2024)	**8%** French language students (2024)	**18%** students enrolled in public programs (2024)

Student numbers by visa type (2024)



» In 2024, there was an 18% increase in the number of students entering the country on TRVs.

» 30% of students in the public sector entered and studied in Canada on a study permit, whereas the proportion in the private sector was 17%.

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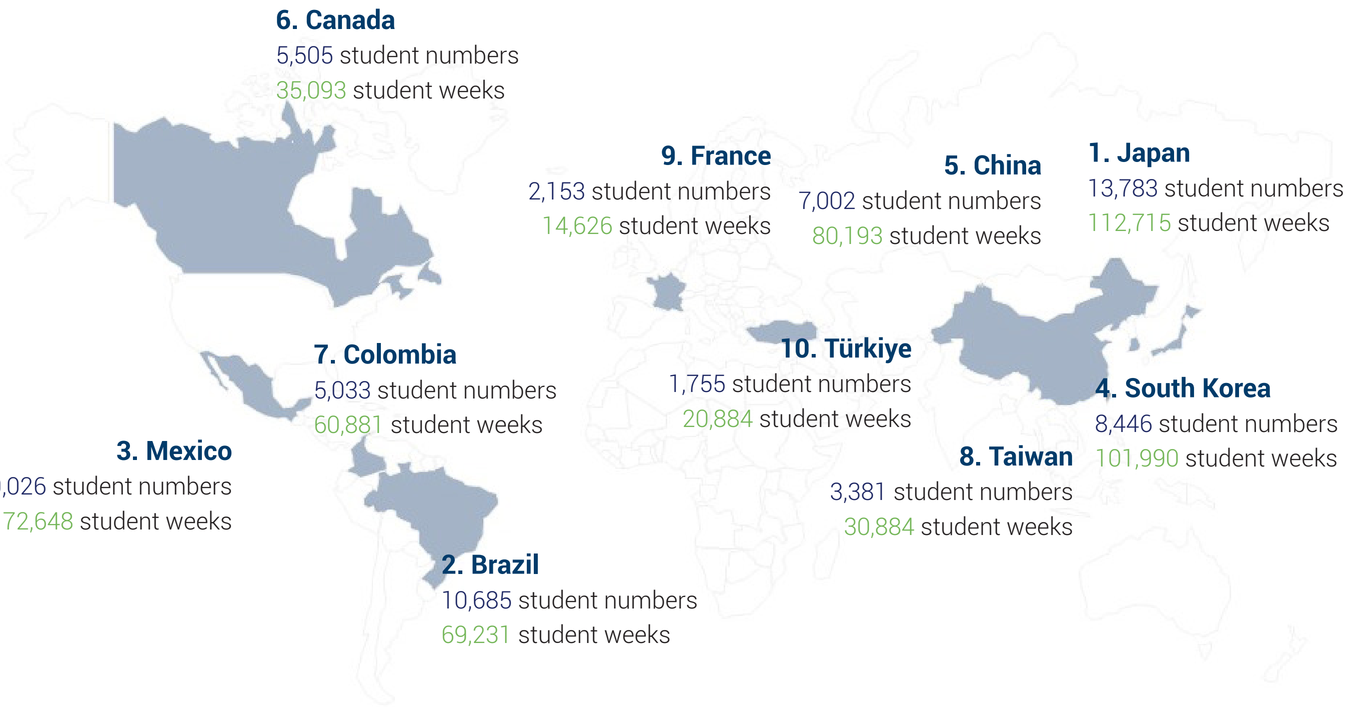
Top 10 source markets (2024)



- **After years of dominance as the largest source region for members, South America was overtaken by Asia in 2024. Asia accounted for 48% of all student weeks and 42% of all students studying with participating members.**
- **Despite a year-on-year drop, Japan retained its position as the largest source market for Languages Canada's members.**
- **South Korea and Taiwan continued to recover, experiencing a year-on-year growth of 8% and 9%, respectively.**

$341
Average weekly tuition (2024)

$403
Average weekly income from accommodation fees (2024)

$1.04 billion
Direct economic contribution by Languages Canada members in 2024

-13%
Decline in direct economic contribution over 2023