QUARTERLY
INTELLIGENCE
COHORT

Market Report
Q2 2018

Executive Summary

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Q2 2018
Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information.

This is the executive summary of the quarter two (Q2) 2018 report from our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), which introduces features not available in our existing annual student statistics reports.

QUIC provides in-depth, quarterly analysis of the UK English language teaching (ELT) industry's source markets. The full reports are available only to QUIC members, who can use them to benchmark their performance and monitor market trends. Membership is on a rolling annual basis, and all English UK centres can join the 2019 cohort up until March 2019. An executive summary will be made publicly available.

Added value has been achieved through the outsourcing of data processing to StudentMarketing, an independent market research firm and UNWTO Affiliate Member. StudentMarketing is also a member of ESOMAR World Research. The cleaning and fine-tuning of the data to international research standards means that the market intelligence is more exact, more precise, and therefore more reliable than ever before. Members can be confident in the robustness of this quarter two report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Last year's QUIC cohort has been strengthened by the addition of 20 new members, taking total membership for 2018 to 144 centres. The cohort in Q2 2018 was 142 members. Of the 144 centres initially participating in QUIC in 2018, one has closed down and one has withdrawn from the scheme. The current sample represents one third of the overall membership.
To reflect the diverse nature of the sector and the association's membership, data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges from both the private and state sector.

In addition to the quantitative expansion of the sample, this year we are also implementing new components, namely:

- representation of Northern Ireland;
- regional classification of individual multi-centre locations;
- breakdown of student weeks by booking type;
- more detailed breakdown of adult course types;
- breakdown of junior course types;
- regional analysis of student weeks by course type;
- historical comparative analysis of overall figures, and in breakdowns by source country.

As the scheme continues its second year, we have been able to include comparative historical analysis which adds a new depth to the data. Further improvements, such as sectorial analysis or deeper regional insight, may be possible in future if the cohort becomes more representative, or if additional member data is sought.

For more information on QUIC, please email statistics@englishuk.com.

Note: Data is provided in student weeks, defined as one student taking 10 or more teacher-taught hours in one week. Those studying fewer hours are excluded from the calculations.

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Overview

Table 1
QUIC region summary

Region	**No. of** returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	41	25.9%	51,664	27.2%
South and South Eastern England	40	25.3%	41,029	21.6%
Northern England	22	13.9%	34,208	18.0%
South West England and The Channel Islands	21	13.3%	31,775	16.7%
Eastern England	19	12.0%	20,498	10.8%
Central England and Wales	8	5.1%	4,638	2.4%
Scotland and Northern Ireland	7	4.4%	6,217	3.3%
Total	**158**	**100.0%**	**190,028**	**100.0%**

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks were rounded and do not add up to the total sum of student weeks.
Note: Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment. Similarly, Northern Ireland was merged with Scotland.
Note: The number of participating member centres in Q2 2018 is 142. The number of returns differs per quarter and depends on when teaching premise locations are operational.

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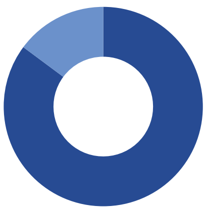
The 142 English UK member centres which reported QUIC data in Q2 2018 registered a total of 190,028 student weeks. (Note: one centre closed down and one centre withdrew from the QUIC reporting scheme in Q2 2018). These 142 member centres represent 158 teaching premise locations.

The ratio of adult to junior student weeks in Q2 2018 averaged out at 85% to 15% (161,827 adult student weeks to 28,201 junior student weeks).

Chart 1
Student weeks by age group



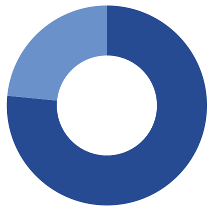
The below year-on-year comparison, which draws data from 115 centres represented in both quarters, points to a meagre increase in terms of total student weeks (+0.5%) while demonstrating a significant growth in junior weeks (+11%).

Period	Total weeks	Junior weeks	%	Adult weeks	%
Q2 2017	160,891	19,619	12%	141,272	88%
Q2 2018	161,672	21,778	13%	139,894	87%
Change	+0.5%	+11.0%		-1.0%	

n=115 centres

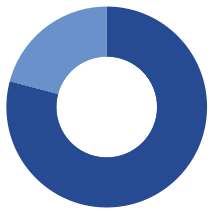
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



More than three quarters of all student weeks (77%, 145,469) were booked through a commissionable source.

Chart 3
Student weeks by booking type



Group bookings in the second quarter of 2018 represented 21% of all student weeks (39,671), showing a slight increase compared to the previous quarter (19% in Q1).

Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

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Chart 4

Student weeks by junior course types

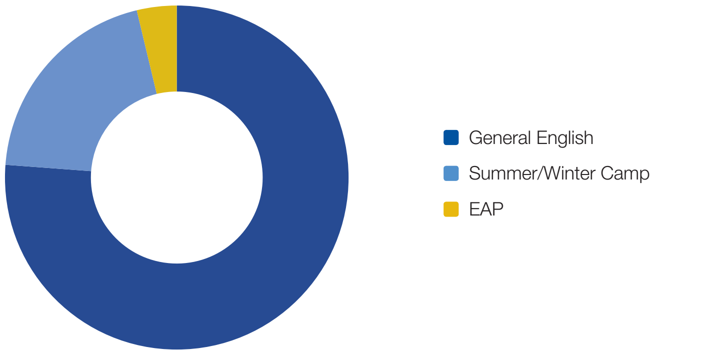
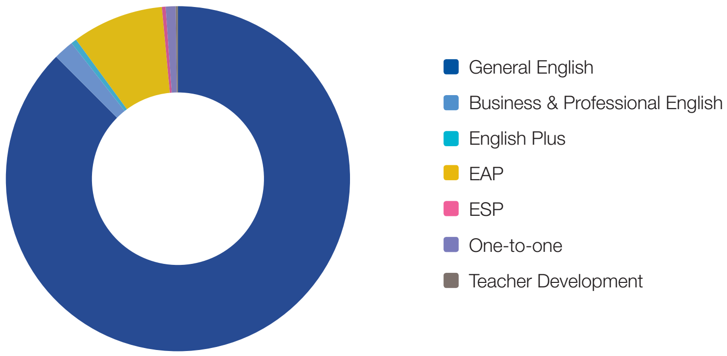


Chart 5

Student weeks by adult course types



With regard to juniors, 76% of all course weeks were spent studying General English. The second favourite programme was Summer/Winter Camp (20%), followed by English for Academic Purposes (4%). The rank of programme types did not change between Q1 and Q2 but proportionally, there were more General English student weeks (up from 66%).

The market share of adult course types remained comparable with the first quarter. Adults continued to spend most weeks on General English (87%). English for Academic Purposes courses accounted for 9%, followed by Business and Professional English courses (2%).

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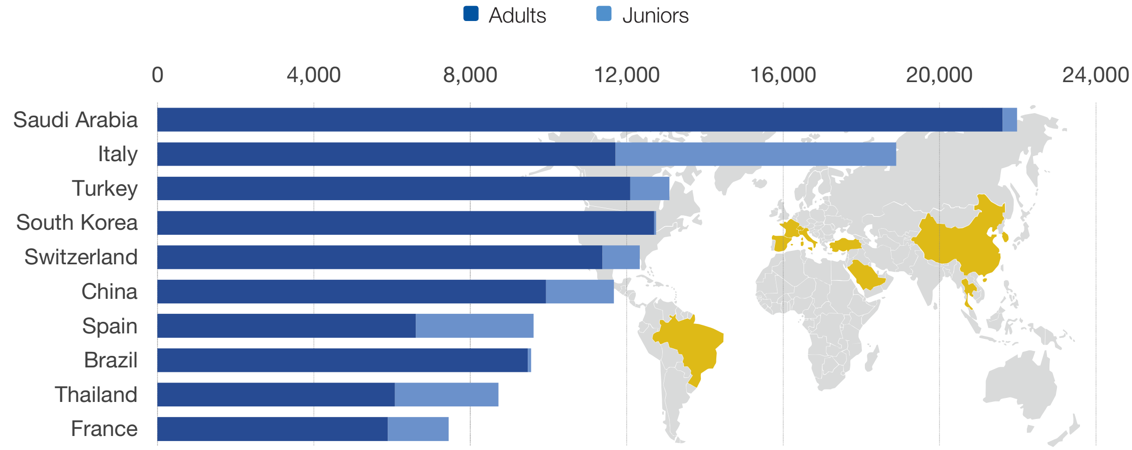
Chart 6
Student weeks by age group and source country (top 10 markets)



The top 10 countries represented 66% of all student weeks in Q2 2018. With an almost 12% market share and 21,981 student weeks, Saudi Arabia was the number one source country. Italy scored second for the second quarter in a row. Turkey occupied the third place, having outperformed Brazil and South Korea.

Saudi Arabia, South Korea and Turkey were the top source countries for adult student weeks, with this age band constituting 98.4%, 99.6% and 92.3% (respectively) of student weeks. Italy, as a leading junior market, generated 7,174 under-18 student weeks, which represented over one third of its own student week production and 25.4% of all under-18 student weeks. The next major junior feeders were Spain (3,005), Thailand (2,652), China (1,734), Russia (1,621) and France (1,555).

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