QUIC
QUARTERLY INTELLIGENCE COHORT

Market Report
Q3 2017

Executive Summary

ENGLISH UK

englishuk.com/quic

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Q3 2017
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 third report from our new optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), which introduces features not available in our existing 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. They include student weeks by source country, age group, booking source and programme type, and regional comparative analysis. The executive summary is made publicly available.

With 124 members, QUIC's 2017 cohort is the largest sample in English UK's history of quarterly reporting. 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. All English UK members will get an opportunity to join the 2018 cohort in December 2017.

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 Q3 report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Historical comparative analysis is provided for the first time since the launch of QUIC. This feature will continue and be further enhanced for future reports.

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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Table 1
QUIC region summary

Region	**No. of** returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	29	23.4%	56,776	15.5%
London	24	19.4%	71,428	19.5%
Northern England	20	16.1%	70,437	19.3%
South West England and The Channel Islands	15	12.1%	48,060	13.1%
Eastern England	12	9.7%	29,161	8.0%
Scotland	6	4.8%	12,227	3.3%
Central England and Wales	6	4.8%	11,248	3.1%
Multi-centres	12	9.7%	66,422	18.2%
Total	**124**	**100%**	**365,759**	100.0%

Note: There are no English UK member centres from Northern Ireland currently participating in QUIC. Furthermore, Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment.

Note: In Q1 2017 multi-centres were categorised by the location of their headquarters. To improve accuracy, multi-centres are now categorised separately.

Q3 2017
Overview

In Q3 2017, the 124 English UK member centres who report QUIC data registered a total of 365,759 student weeks – an increase by 107% over Q2.

The ratio of adult to junior student weeks at the centres declaring data for Q3 2017 averaged out at 70% to 30% (254,452 adult student weeks to 111,307 junior student weeks). The proportion significantly shifted towards juniors (89% to 11% in Q2).

Chart 1
Student weeks by age group

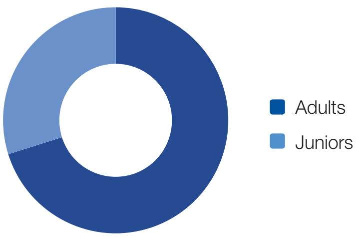
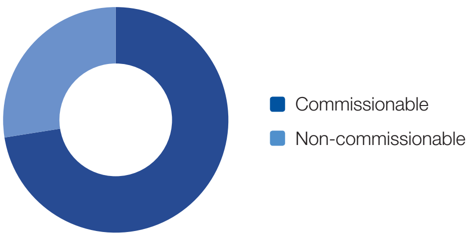
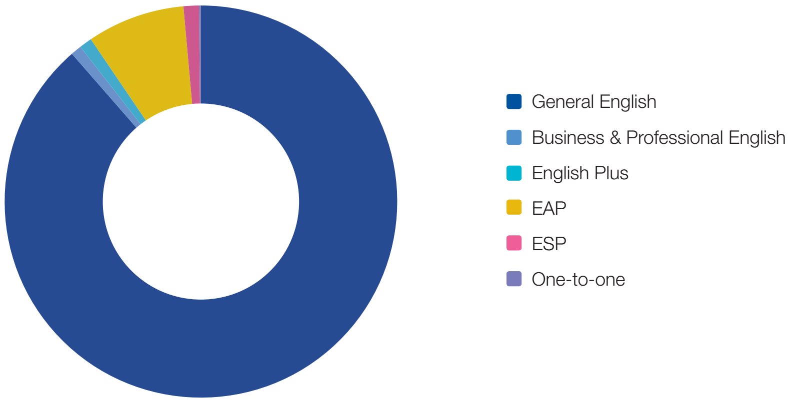


Chart 2
Student weeks by booking source



Of all student weeks, 72% (262,899) were booked through a commissionable source (e.g. via a study abroad partner agency).

Chart 3
Student weeks by course type

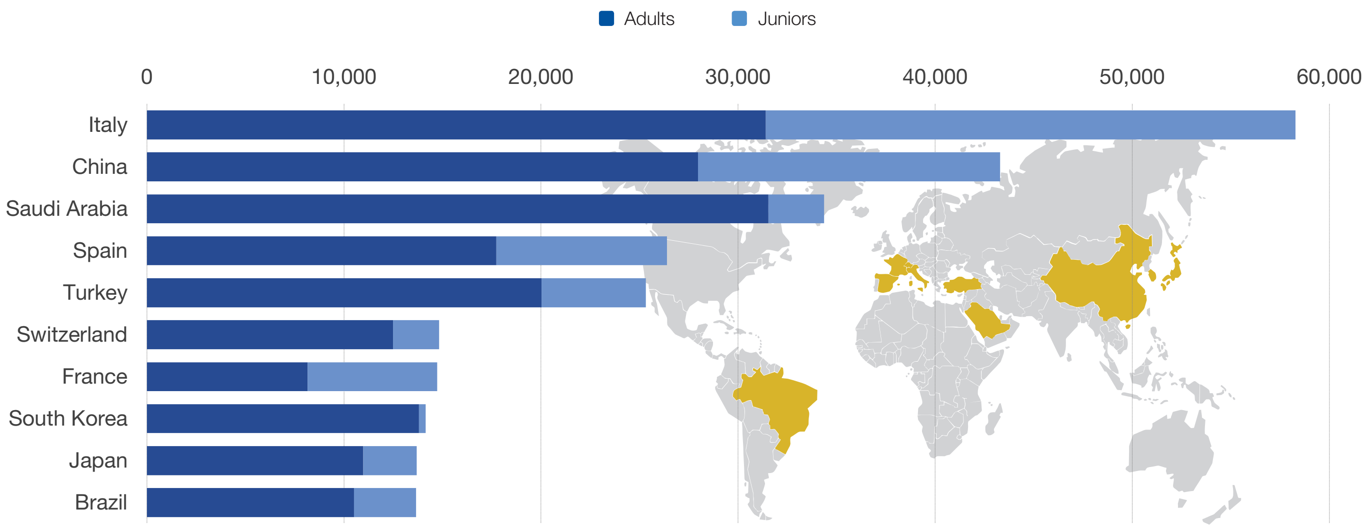


As for programme preferences, 88.6% of all course weeks were spent studying General English. English for Academic Purposes, as the second most popular programme type, accounted for 8.1% of student weeks. English for Specific Purposes showed greater demand in Q3 than in Q2, representing 1.3% of all student weeks (an increase from 0.3% in Q2), while the market share of English Plus declined to 1.1% (from 1.4% in Q2).

Q3 2017 Overview

Chart 4

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



The composition of the top 10 leading markets in Q3 remained largely unchanged from the previous quarters. The most notable shifts within the ranking were the greater importance of China, Spain and France for the overall Q3 business.

Of the top 10 countries, Italy had the highest share of junior student weeks (46%), followed by France (45%).

Table 2

Student weeks in Q3 2016 and Q3 2017 by age group

Period	Total weeks	Junior weeks	Adult weeks
	Σ		
Q3 2016	183,203	50,306	132,897
Q3 2017	214,851	59,366	155,485
Change	+17.3%	+18.0%	+17.0%

Note: Historical comparison results are based on a sample of centres reporting quarterly in both 2016 and 2017 (n=70). The data is therefore indicative.

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