QUIC

QUARTERLY
INTELLIGENCE
COHORT

Market Report
Q3 2018

Executive Summary

ENGLISH UK

englishuk.com/quic

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Q3 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 three (Q3) 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 three 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 Q3 2018 was 142 members. Of the 144 centres initially participating in QUIC in 2018, one has closed down and one withdrew from the scheme in Q2 2018. 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 sectoral 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	%
South and South Eastern England	71	30.1%	87,922	22.2%
London	49	20.8%	94,983	23.9%
Eastern England	33	14.0%	44,410	11.2%
Northern England	31	13.1%	80,066	20.2%
South West England and The Channel Islands	28	11.9%	63,326	16.0%
Central England and Wales	14	5.9%	10,599	2.7%
Scotland and Northern Ireland	10	4.2%	15,477	3.9%
Total	**236**	**100.0%**	**396,783**	**100.0%**

Note: Percentages do not add up to 100% due to rounding.
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 Q3 2018 is 142. The number of returns differs per quarter and depends on when teaching premise locations are operational.

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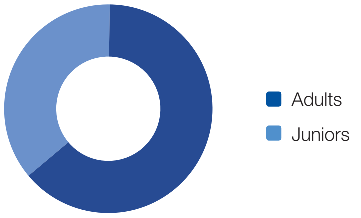
The 142 English UK member centres reported a total of 396,783 student weeks in Q3 2018. Altogether, they represented 236 teaching centre locations.

In total, 64% of student weeks were spent by adults (252,592). The volume of junior student weeks was considerably greater in Q3 (36%, 144,191) than in the first (12%, 20,844) and second quarter (15%, 28,201) of 2018, underlining the importance of seasonality in this age segment.

Chart 1
Student weeks by age group



Of the 114 centres which contributed to quarterly reporting in Q3 2017 as well as Q3 2018, 59% reported a decrease in student weeks. This translated into a drop of total student weeks (-3.9%). The decline was more significant in the junior (-7.5%) than the adult cohort (-2.2%).

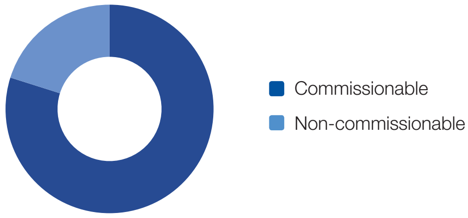
Period	**Total** weeks	**Junior** weeks	**%**	**Adult** weeks	**%**
Q3 2017	346,561	113,702	33%	232,859	67%
Q3 2018	333,001	105,149	32%	227,852	68%
Change	-3.9%	-7.5%		-2.2%	

n=114 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).

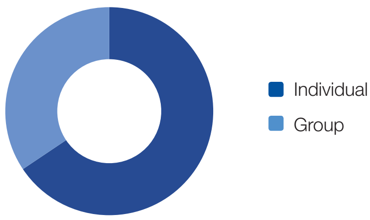
Four of five student weeks were booked through a commissionable source (80%, 316,884).

Chart 2
Student weeks by booking source



Group bookings in the third quarter of 2018 represented 34% of all student weeks (136,492). This type of booking, coinciding with a higher share of juniors in Q3, was more common than in the previous quarters (19% in Q1 and 21% in Q2 2018).

Chart 3
Student weeks by booking type



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

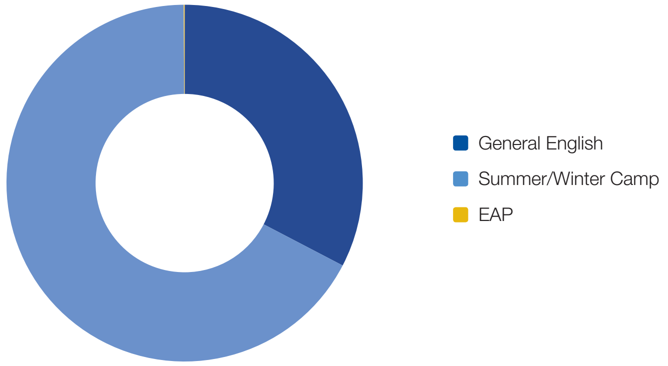
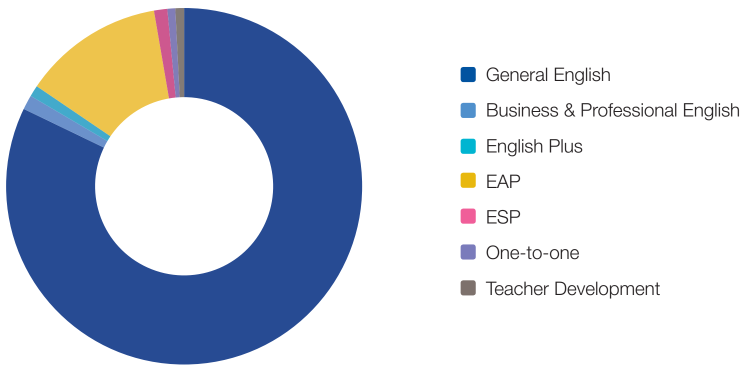


Chart 5
Student weeks by adult course types



The majority of junior weeks were spent in summer camp programmes (67%). Each third junior week was enrolled in a General English course (33%). English for Academic Purposes was not popular among juniors in this period of the year (<1%).

The most popular adult course type remained General English (82% of adult student weeks). English for Academic Purposes courses accounted for 13%, while the other course types represented not more than 1%.

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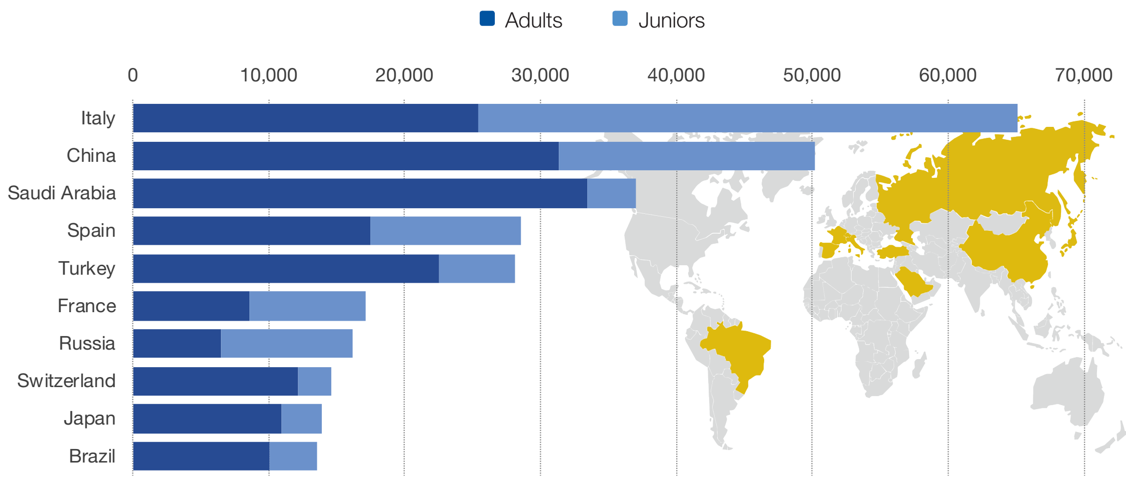
Chart 6
Student weeks by age group and source country (top 10 markets)



The top 20 countries represented 88% of all student weeks in Q3 2018. The order of top five source countries remained unchanged from Q3 2017.

Italy was the most productive market in both overall ranking (65,089 student weeks) and junior student weeks (39,675). Under-18 students accounted for 61% of all Italian student weeks. China claimed the second spot, accounting for 31,345 adult and 18,867 junior student weeks. The third largest market was Saudi Arabia with a total of 36,988 student weeks (of which adults accounted for 90%). Italy and China were followed as the most important junior senders by Spain (11,131 student weeks), Russia (9,681) and France (8,499).

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