QUARTERLY
INTELLIGENCE
COHORT

ENGLISH UK

Executive summary

Q1 2019

ENGLISH UK

englishuk.com/quic

Copyright © 2019 ENGLISH UK

Prepared on behalf of:

English UK
47 Brunswick Court, Tanner Street, London SE1 3LH, UK | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

BONARD
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.bonard.com | info@bonard.com

Q1 2019

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 one (Q1) 2019 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. An executive summary will be made publicly available.

Added value has been achieved through the outsourcing of data processing and subsequent analysis to BONARD (formerly StudentMarketing), an independent market research firm and UNWTO Affiliate Member. BONARD is also a member of ESOMAR World Research. Two-tiered data validation and reporting 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 one (Q1) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Compared to the previous year's cohort, 20 new member centres signed up for the scheme in 2019, taking the total sample to 155 centres. The current sample now represents 37% of the overall English UK member base. 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 a new historical comparative analysis of overall figures and breakdowns by source country, reflecting on feedback from the previous year.

Further enhancements in the provision of sectoral, regional and provider-type breakdowns are shared with QUIC members in the form of the accompanying pivot tables. These are supplied to members in a user-friendly way to offer them more granular intelligence and benchmarks tailored to their organisation.

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.

Q1 2019

Overview

Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	32	23.4%	51,948	29.5%
South and South Eastern England	31	22.6%	34,418	19.6%
Northern England	25	18.2%	36,938	21.0%
South West England and The Channel Islands	23	16.8%	23,109	13.1%
Eastern England	13	9.5%	19,087	10.8%
Scotland and Northern Ireland	7	5.1%	6,121	3.5%
Central England and Wales	6	4.4%	4,361	2.5%
Total	**137**	**100.0%**	**175,982**	**100.0%**

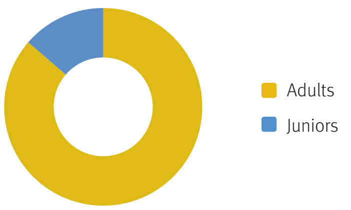
Note: Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment. Similarly, Northern Ireland was merged with Scotland.
Note: The number of participating member centre locations in Q1 2019 is 137. This number differs per quarter and depends on when teaching centre locations are operational.

Q1 2019
Overview

The 155 English UK member centres that are signed up for QUIC scheme in 2019 represent 260 teaching centre locations. Of these, 137 locations were operational in the first quarter of 2019 and registered a total of 175,982 student weeks.

The ratio of adult to junior student weeks at the centres declaring data for Q1 2019 averaged out at 86% to 14% (151,924 adult student weeks to 24,058 junior student weeks).

Chart 1
Student weeks by age group



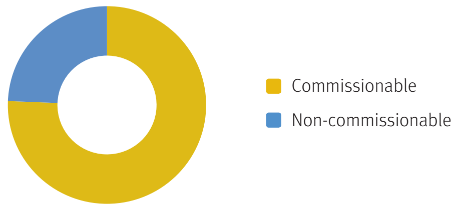
Data from 135 centres participating in both Q1 2018 and Q1 2019 point to a decline of 3.5% in student weeks, caused primarily by a drop in adult student weeks. Junior student weeks surged by 15.6% and, consequently, increased their share at member centres from 10% in Q1 2018 to 13% in Q1 2019.

Period	Total weeks	Junior weeks	%	Adult weeks	%
Q1 2018	171,781	17,990	10%	153,791	90%
Q1 2019	165,848	20,804	13%	145,044	87%
Change	-3.5%	+15.6%		-5.7%	

n=135 centres

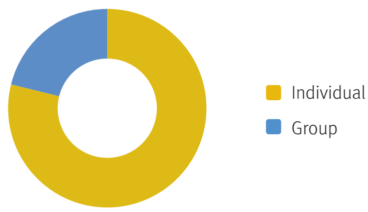
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



Of all declared student weeks, 76% were booked through a commissionable channel.

Chart 3
Student weeks by booking type



Over one fifth of student weeks (21%) were recorded by student groups.

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

QUARTERLY
INTELLIGENCE
COHORT

Q1 2019
Overview

Chart 4
Student weeks by junior course types

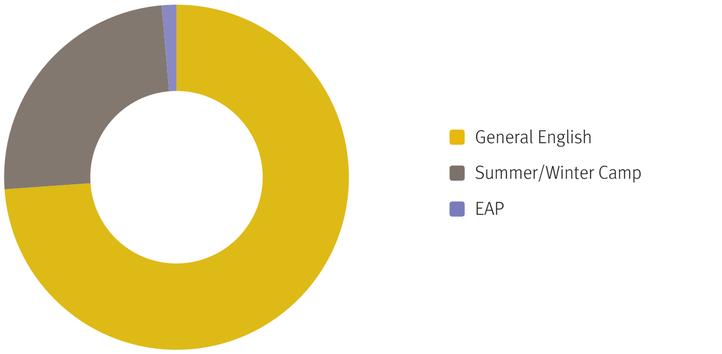
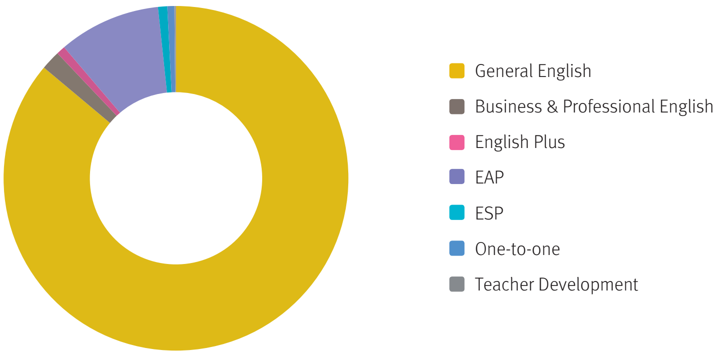


Chart 5
Student weeks by adult course types

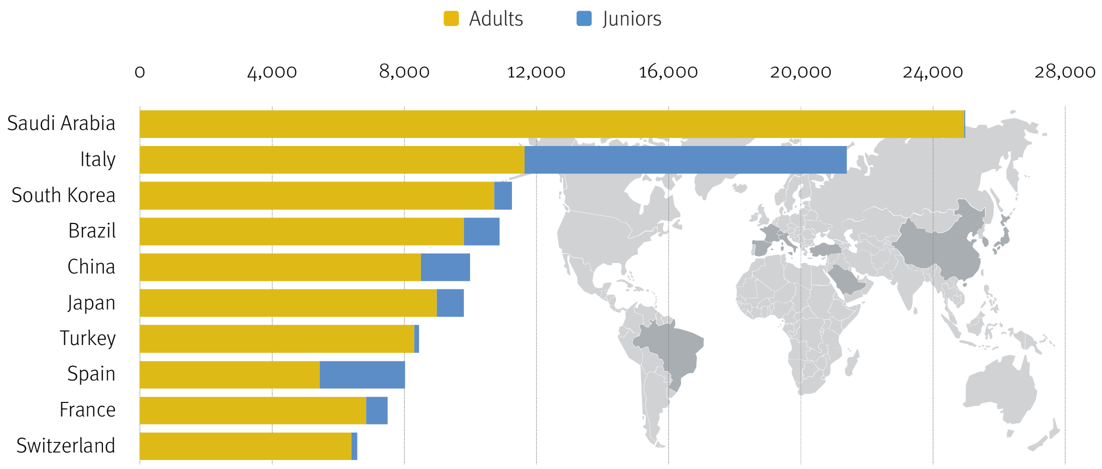


Juniors spent the majority of their student weeks (74%) on General English courses. Each fourth student week was assigned to Winter Camp programmes. Among adult course types, as is traditional, General English dominated (86% of student weeks) while English for Academic Purposes was the second most popular choice for students (10%). Business & Professional English accounted for 2% of student weeks.

Q1 2019
Overview

Chart 6

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



With 24,974 student weeks, Saudi Arabia was the most represented market. Adult weeks constituted almost 100% of Saudi bookings. Italy, occupying the second position, represented the top source of junior student weeks (9,753, which accounted for 46% of all student weeks from this source market). It was followed by Spain, China, Brazil and Russia as the next largest producers of under-18 student weeks. South Korea ranked third overall (11,264 student weeks).

QUARTERLY
INTELLIGENCE
COHORT

ENGLISH UK

englishuk.com/quic