
Executive summary

Q4 2019

Including Q1 – Q4 cumulative summary

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Prepared on behalf of:



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Q4 2019 and 2019 Summary

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 four (Q4) 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 four (Q4) 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. Of the 155 centres initially participating in QUIC 2019, one has withdrawn from the scheme and two have closed down; thus, the Q4 cohort comprised 152 members. The current sample now represents 36% 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. Moreover, the Q4 report features cumulative yearly data for 2019 which summarises and combines Q1 – Q4 figures.









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. In Q4, pivot tables for both Q4 and the whole of 2019 are provided. 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.

Q4 2019 Overview

Table 1
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
 South and South Eastern England	31	24.2%	30,278	18.3%
 London	28	21.9%	50,088	30.3%
 Northern England	24	18.8%	40,347	24.4%
 South West England and The Channel Islands	21	16.4%	22,140	13.4%
 Eastern England	13	10.2%	14,517	8.8%
 Scotland and Northern Ireland	7	5.5%	5,436	3.3%
 Central England and Wales	4	3.1%	2,371	1.4%
Total	128	100.0%	165,177	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 teaching centre locations in Q4 2019 is 128. This number differs per quarter and depends on when teaching centre locations are operational.

Note: Percentages do not add up to 100% due to rounding.

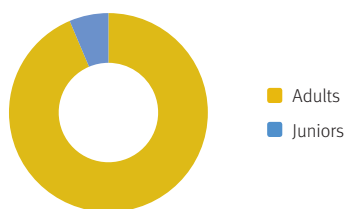
Q4 2019 Overview

The 152 English UK member centres that are signed up for the QUIC scheme in 2019 represent 275 teaching centre locations. Of these, 128 locations were operational in the fourth quarter of 2019 and registered a total of 165,177 student weeks.

The ratio of adult to junior student weeks at the centres declaring data for Q4 2019 averaged out at 94% to 6% (154,660 adult student weeks to 10,517 junior student weeks).

Chart 1

Student weeks by age group



n=152 centres participating in Q4 2019

Overall the 132 member centres that reported data in both Q4 2018 and Q4 2019 experienced growth of 9.2%. The junior age band grew by more than a third compared to the previous year; in terms of absolute figures, however, the increase was generated primarily by adult students.

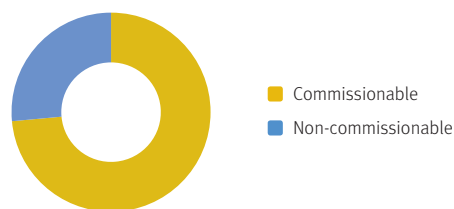
Period	Total weeks	Junior weeks	%	Adult weeks	%
Q4 2018	144,657	6,360	4%	138,297	96%
Q4 2019	157,907	8,541	5%	149,365	95%
Change	+9.2%	+34.3%		+8.0%	

Note: The figures relate to a like-to-like comparison, which is based on data from centres participating in both Q4 2018 and Q4 2019 (n=132 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



n=152 centres participating in Q4 2019

In Q4 commissionable student weeks saw the lowest proportion of all quarters of 2019 (74%).

Chart 3

Student weeks by booking type



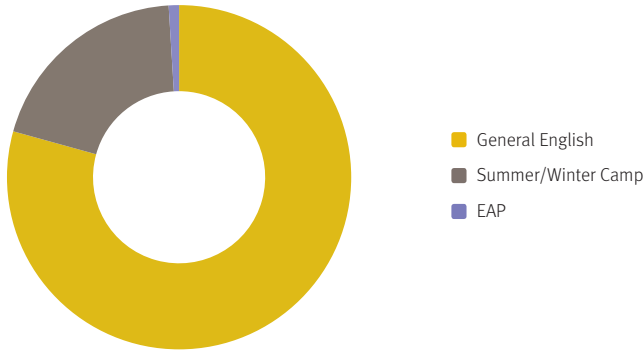
n=152 centres participating in Q4 2019

Group bookings in the fourth quarter represented 15% of all student weeks.

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

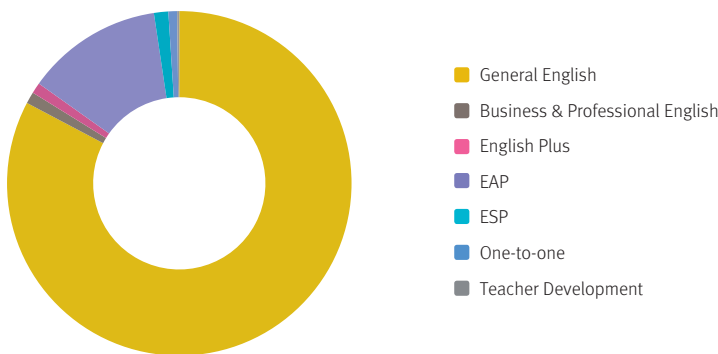
Q4 2019 Overview

Chart 4
Student weeks by junior course types



n=152 centres participating in Q4 2019

Chart 5
Student weeks by adult course types



n=152 centres participating in Q4 2019

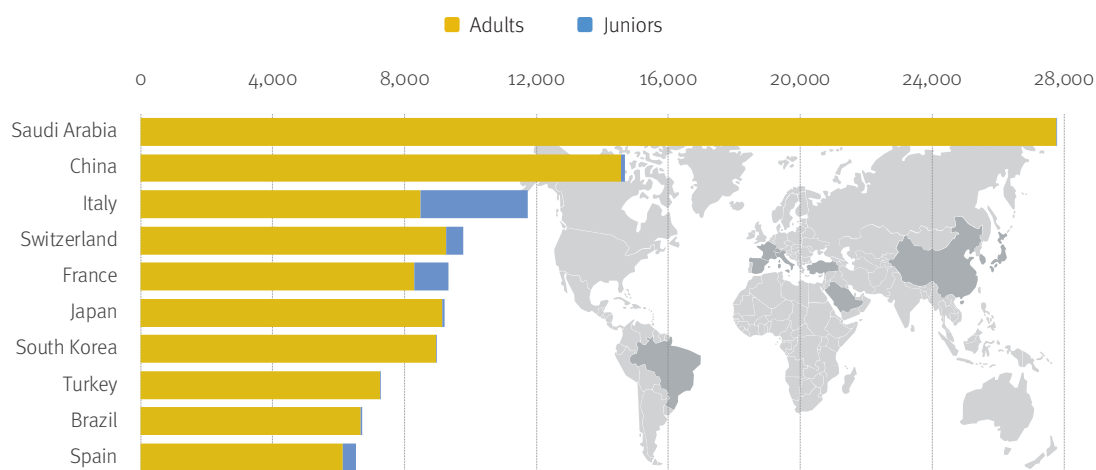
Student weeks spent on General English courses dominated in both age groups (79.3% junior weeks; 82.7% adult weeks). Winter Camps, the second most attractive

course type for juniors, accounted for 19.7% student weeks. As is traditional for adult programmes, English for Academic Purposes occupied the second position (12.8%).

Q4 2019 Overview

Chart 6

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



n=152 centres participating in Q4 2019

Saudi Arabia took first position among all source markets in Q4 2019, as it did in both Q1 and Q2. The country recorded 27,791 student weeks, 99.9% of which were booked by adult students. China ranked second with 14,673 student weeks;

similarly, almost all of these were generated by adults. The third most represented country, Italy (11,729 weeks), was also the top market for under-18 students, accounting for 31% of all junior student weeks for this particular quarter.

2019 Summary Overview

This section presents cumulative data for the full 2019 year. The figures relate to data from the 152 English UK member centres

in QUIC that reported in all four quarters of 2019 (except for Table 2 which includes all participating centres in each quarter).

Table 2
QUIC 2019 region summary

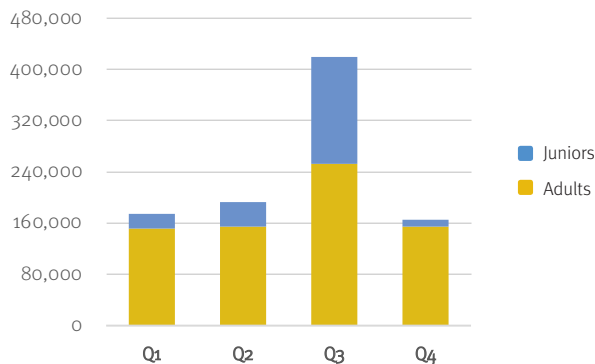
Region	Q1		Q2		Q3		Q4		Overall	
	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns	No. of returns	Proportion of returns
South and South Eastern England	31	22.6%	48	28.6%	75	29.6%	31	24.2%	185	27.0%
London	32	23.4%	39	23.2%	53	20.9%	28	21.9%	152	22.2%
Northern England	25	18.2%	24	14.3%	37	14.6%	24	18.8%	110	16.0%
South West England and The Channel Islands	23	16.8%	25	14.9%	28	11.1%	21	16.4%	97	14.1%
Eastern England	13	9.5%	19	11.3%	28	11.1%	13	10.2%	73	10.6%
Scotland and Northern Ireland	7	5.1%	8	4.8%	13	5.1%	7	5.5%	35	5.1%
Central England and Wales	6	4.4%	5	3.0%	19	7.5%	4	3.1%	34	5.0%
Total	137	100.0%	168	100.0%	253	100.0%	128	100.0%	686	100.0%

Note: The number of participating centres in Q1 was 155. In Q2, one centre withdrew from the scheme, taking the total sample to 154. In Q3, two other centres closed down; thus, the Q3 and Q4 cohort was 152 members. Table 2 includes the one centre which withdrew and the two which closed down (included in number of returns for Q1 and Q2).

Note: The number of participating teaching centre locations differs per quarter and depends on when teaching centre locations are operational.

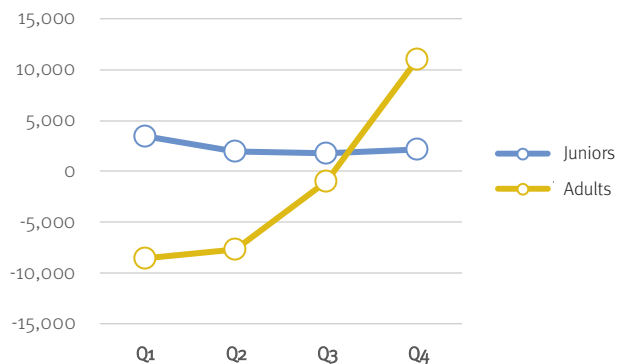
Note: Percentages do not add up to 100% due to rounding.

Chart 7
Student weeks by quarter and age group



Note: The figures in Chart 7 relate to data from centres reporting in all four quarters of 2019 (n=152 centres).

Chart 8
Absolute year-on-year change in student weeks (2019 vs 2018)



Note: The figures in Chart 8 relate to a like-to-like comparison, which is based on data from centres participating in both 2018 and 2019 (n=132 centres).

2019 Summary Overview

Chart 9

Student weeks by quarter and booking source

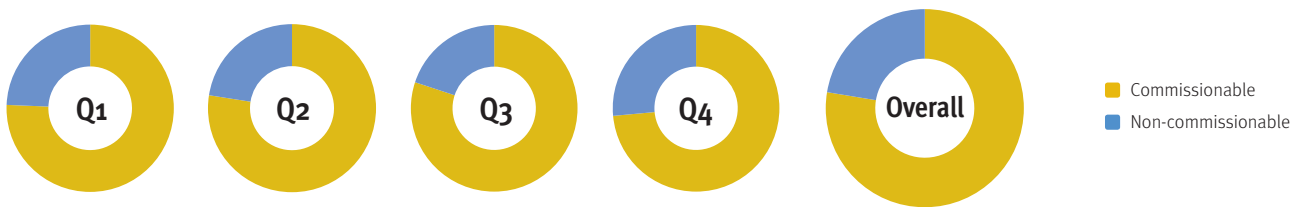


Chart 10

Student weeks by quarter and booking type

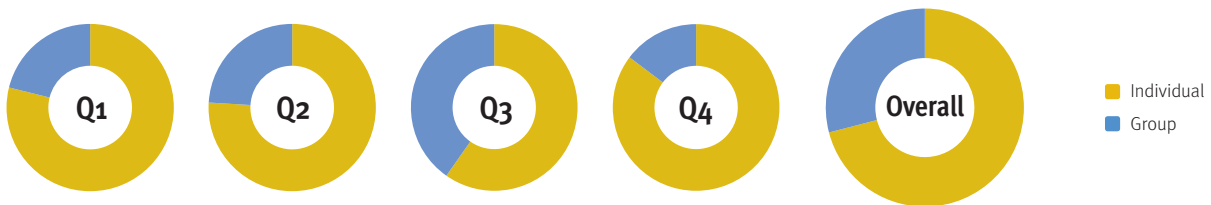


Chart 11

Student weeks by quarter and junior course types

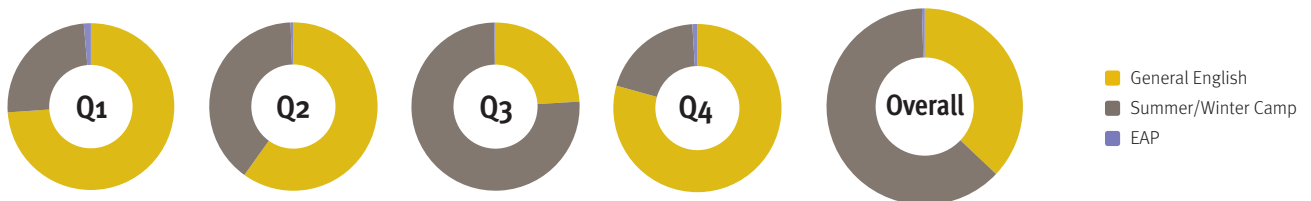
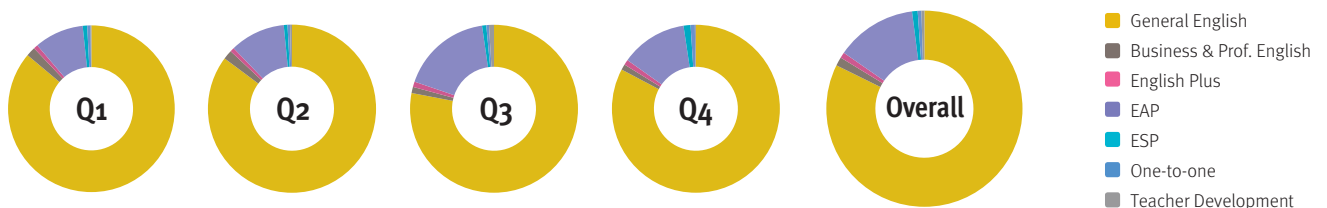


Chart 12

Student weeks by quarter and adult course types



Note: The figures in Charts 9, 10, 11 and 12 relate to data from centres reporting in all four quarters of 2019 (n=152 centres).

Note: Percentages do not add up to 100% due to rounding.

QUIC QUARTERLY INTELLIGENCE COHORT



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