QUIC
QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q1 2023

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

STUDENT STATISTICS REPORT Q1 2023

Prepared on behalf of

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THE QUARTERLY INTELLIGENCE COHORT

INTRODUCTION

Market intelligence is a critical driver of business success. At English UK, we are dedicated to supporting our members with advanced and timely information. Our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), offers unique features not found in the annual student statistics reports.

QUIC monitors the industry's changing landscape to provide a timely and extensive analysis of its source markets. As a result, the data provided offers the participating member centres a competitive advantage. Whilst executive summaries are made publicly available, the full reports are exclusive to these QUIC members, enabling them to benchmark their performance and monitor market trends.

The QUIC reports helped guide the member centres through some of the marketing challenges of the pandemic years. Now, they aim to identify key source markets to prioritise and invest in for future growth.

To ensure the highest accuracy, the data processing and subsequent analysis have been outsourced to BONARD, an independent market research firm and a member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence is always precise and reliable.

In Q1 2023, QUIC participants increased by three compared to Q1 2022, reaching 123 member centres. The current sample represents 38% of the overall English UK member base, one of the highest participation rates to date. This serves as a testament to the growing significance of QUIC.

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 private and state sectors.

Having gathered complete data sets from participating members in 2019 and 2022, we were able to include a historical comparative analysis and provide granular data on recovery levels.

The enhanced sectoral, regional, and provider-type breakdowns are exclusively shared with the QUIC cohort in the form of accompanying pivot tables. These user-friendly tools offer the participating members more granular intelligence and benchmarks tailored specifically to their organisation.

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.

IN-DEPTH INSIGHTS INTO 100+ ELT SOURCE MARKETS SENDING INTERNATIONAL STUDENTS TO ENGLISH UK MEMBER CENTRES

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GENERAL OVERVIEW

Q1 2023 AT A GLANCE

Table 1
QUIC region summary

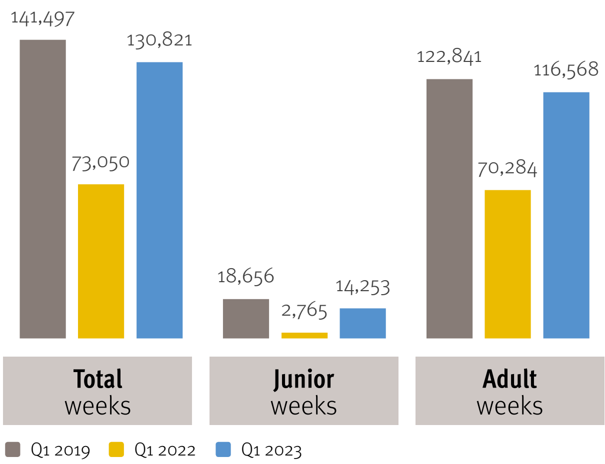
Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	27	25.0%	63,402	42.2%
South and South Eastern England	24	22.2%	29,048	19.3%
Northern England	23	21.3%	24,861	16.5%
South West England and The Channel Islands	15	13.9%	14,200	9.4%
Eastern England	10	9.3%	12,709	8.5%
Central England and Wales	5	4.6%	3,160	2.1%
Scotland and Northern Ireland	4	3.7%	2,890	1.9%
Total	**108**	**100.0%**	**150,270**	**100.0%**

n=123 participating members in Q1 2023
Note: The number of participating member centre locations in Q4 2022 is 108. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and do not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

123 English UK member centres have subscribed to QUIC 2023 (38% of the whole English UK membership). These represent 214 teaching centre locations, of which 108 were operational in Q1 2023 (+8% from Q1 2022) and they recorded a total of 150,270 student weeks.

Student week volume has now nearly reached pre-pandemic levels. Overall it is at 92% of Q1 2019. Looking at age groups, adults recovered around 95% of their 2019 student week volume, and juniors 76%.

Chart 1
Like-to-like comparison of student weeks by quarter



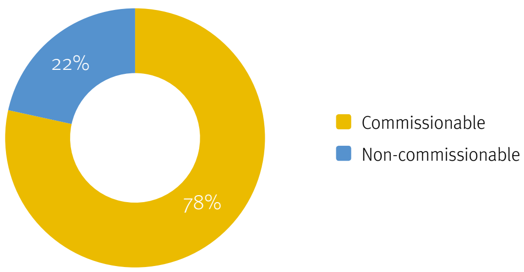
Based on a like-to-like comparison, both age segments increased considerably compared to Q1 2022: adult student weeks grew by almost 80%, while junior student weeks soared by 415%. In the first quarter of 2023, adults accounted for the majority (89%) of student weeks (116,568), while juniors represented 11% (14,243) of the total.

Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q1 2022 vs Q1 2023	+79.1%	+415.4%	+65.9%
Q1 2019 vs Q1 2023	-7.5%	-23.6%	-5.1%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=112 member centres).
Note: Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

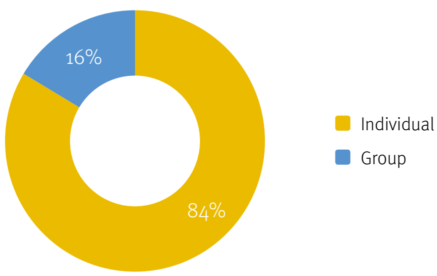
Chart 2
Student weeks by booking source



n=123 member centres participating in Q1 2023

Seventy-eight per cent of the total student weeks in Q1 2023 were commissionable, and 22% were non-commissionable. Based on a like-to-like comparison, the proportion of commissionable weeks in Q1 2019 was slightly lower (76%).

Chart 3
Student weeks by booking type



n=123 member centres participating in Q1 2023

The proportion of individual to group bookings in Q1 2023 was 84% to 16%. Based on like-to-like comparisons, group bookings keep rising towards pre-pandemic levels (20% in Q1 2019, 9% in Q1 2022, 18% in Q1 2023).

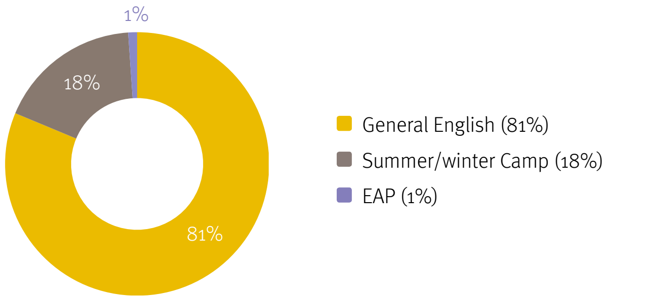
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

GENERAL OVERVIEW

Q1 2023 AT A GLANCE

Chart 4

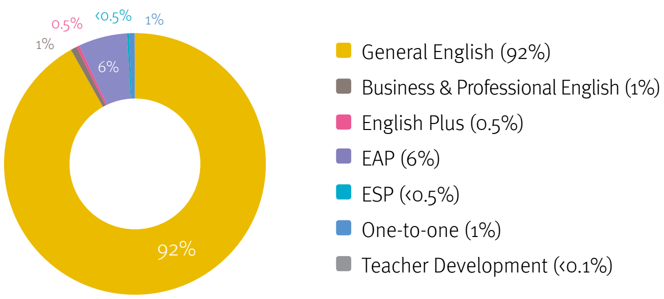
Student weeks by junior course types



n=123 member centres participating in Q1 2023

Chart 5

Student weeks by adult course types



n=123 member centres participating in Q1 2023

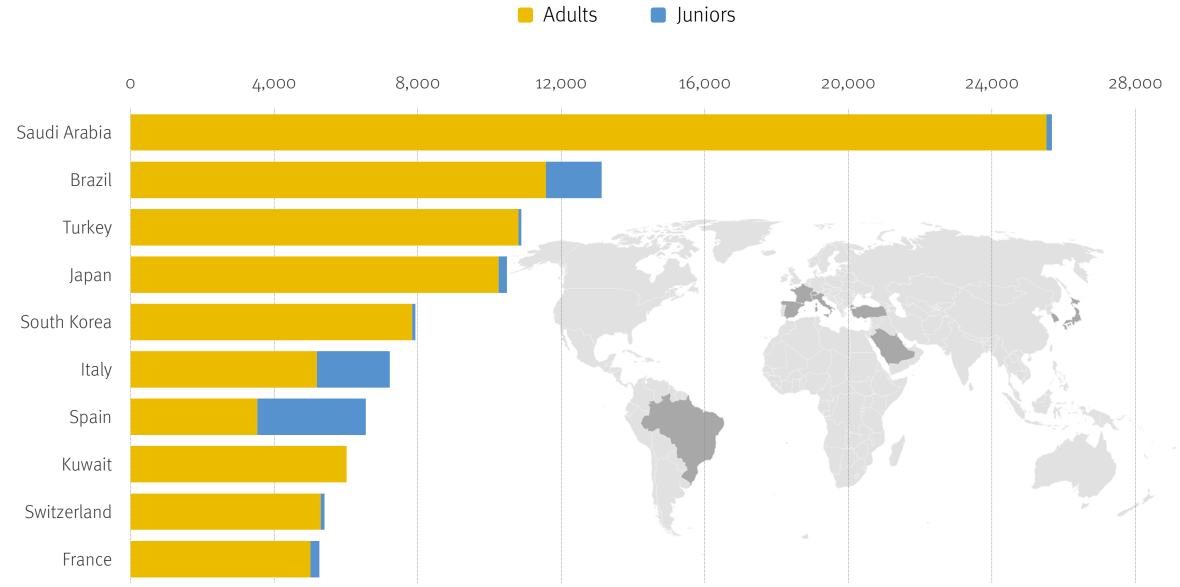
General English courses were the most popular course type in both the junior and adult market, attracting 81% of junior weeks and 92% of all adult weeks.

The share of junior students studying on General English courses was higher than in Q1 2019 (74%) and Q1 2022 (66%).

The distribution of student weeks on adult course type showed the traditional first-quarter pattern. Although, General English courses in Q1 2023 attracted a slightly higher (+0.3%) proportion of adult student weeks than in 2019. And for the second most popular course type, English for Academic Purposes, adult student weeks were still 37% lower than in 2019.

Chart 6

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



n=123 centres participating in Q1 2023

In Q1 2023, the top 10 markets represented 66% of all student weeks.

Saudi Arabia remained the top source market, with 25,671 student weeks and the highest absolute increase, with 9,410 more than in Q1 2022. Turkey outperformed Japan, and Brazil surpassed them both to become the second-biggest source market (+192% and 12,699 more student weeks than in 2022).

Spain outperformed the traditionally strong market Italy with the highest share of juniors (21% of all junior student weeks). Argentina also showed a strong performance in the junior segment, becoming the 3rd largest junior source market.

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