QUIC QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q2 2023

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

QUARTERLY INTELLIGENCE COHORT

STUDENT STATISTICS REPORT Q2 2023

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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 Q2 2023, QUIC participants increased by five compared to Q2 2022, reaching 125 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.

GENERAL OVERVIEW

Q2 2023 AT A GLANCE

Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South & South Eastern England	38	27.3	31,938	23.6
London	36	25.9	43,828	32.4
Northern England	23	16.5	24,247	17.9
South West England & the Channel Islands	16	11.5	17,226	12.7
Eastern England	16	11.5	11,053	8.2
Scotland & Northern Ireland	5	3.6	3,506	2.6
Central England and Wales	5	3.6	3,379	2.5
Total	**139**	**100.0**	**135,177**	**100.0**

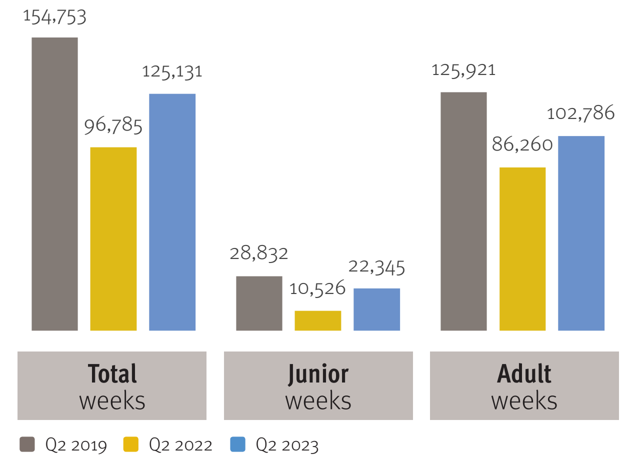
n=125 participating English UK members in Q2 2023
Note: The number of participating teaching centre locations in Q2 2023 is 139. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and do not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

125 English UK member centres subscribe to QUIC 2023. These represent 217 teaching centre locations, of which 139 were operational in Q2 2023 (+18% from Q2 2022). Collectively, they registered 135,177 student weeks.

The recovery of student week volume was solid but at a slightly lower level than observed in the first quarter. In Q2 2022, overall student week volume reached 81% of Q2 2019 levels, with adults recovering 82% of their 2019 student week volume and juniors 77%.

Chart 1

Like-to-like comparison of student weeks by quarter



Based on a like-to-like comparison with Q2 2022, junior student weeks doubled (+103%), to 22,443 in Q2 2023. Adult student weeks increased as well: centres reported 112,733 in Q2 2023, up 16% on Q2 2022. In Q2 2023, adults made up the majority of student weeks (83%), while juniors represented 17% of the total.

Table 2

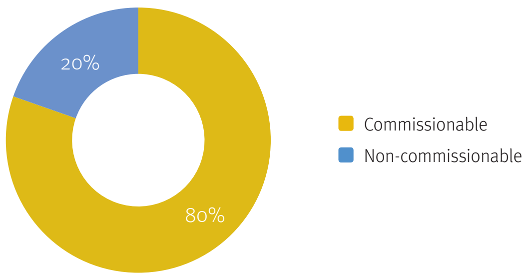
Year-on-year change in student weeks

	Total weeks	**Junior** weeks	**Adult** weeks
Q1 2022 vs Q1 2023	+29.3%	+112.3%	+19.2%
Q1 2019 vs Q1 2023	-19.1%	-22.5%	-18.4%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=111 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

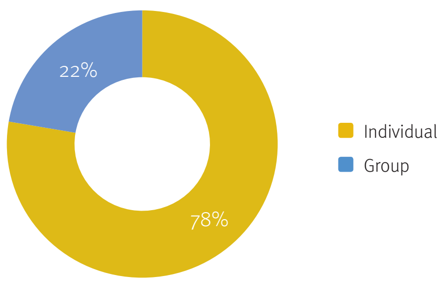


n=125 member centres participating in Q2 2023

Eighty per cent of the total student weeks were commissionable, and 20% were non-commissionable. Based on a like-to-like comparison, the proportion of commissionable weeks in Q2 2019 was slightly lower (-3%).

Chart 3

Student weeks by booking type



n=123 member centres participating in Q1 2023

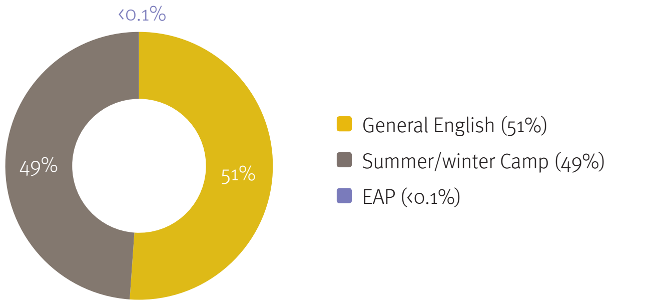
The ratio of individual to group bookings in Q2 2023 was 78% to 22%. Based on like-to-like comparisons, the proportion of group bookings in Q2 2023 continued to rebound and surpassed even pre-pandemic levels (23% in Q2 2019, 14% in Q2 2022, and 24% in Q2 2023).

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

GENERAL OVERVIEW

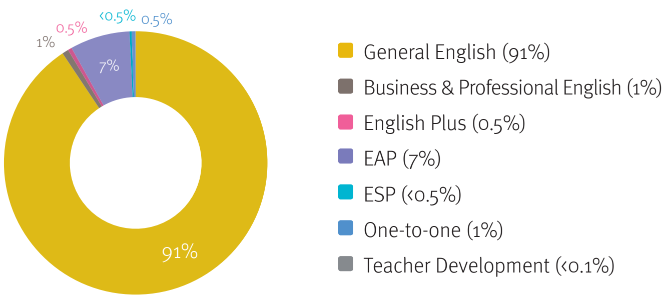
Q2 2023 AT A GLANCE

Chart 4
Student weeks by junior course types



n=125 member centres participating in Q2 2023

Chart 5
Student weeks by adult course types



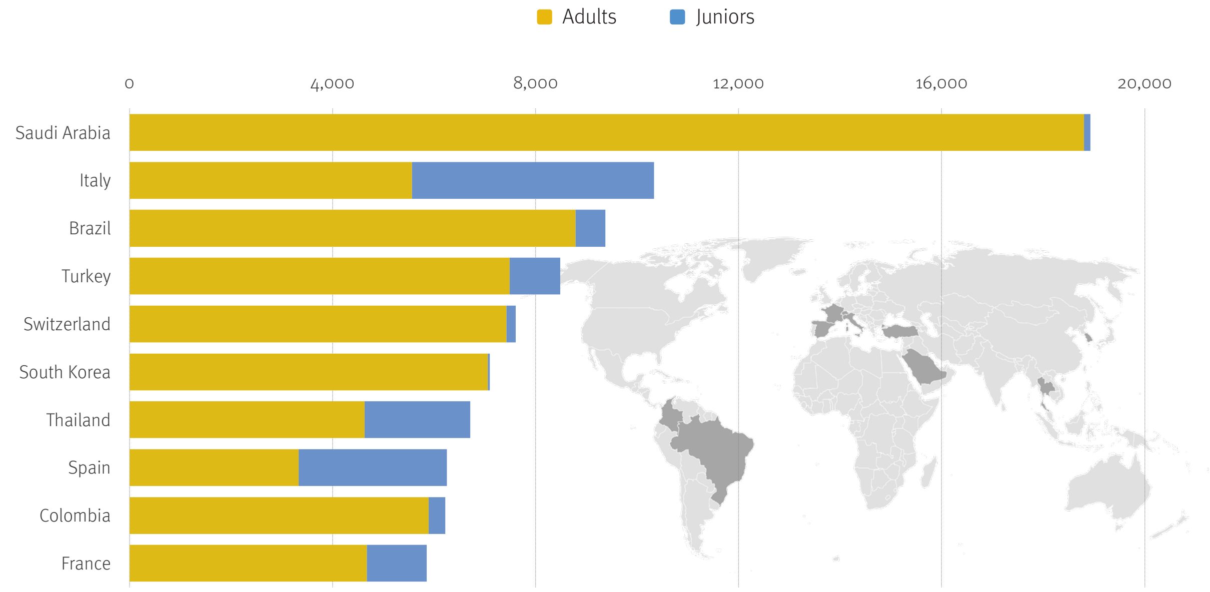
n=125 member centres participating in Q2 2023

Summer/Winter Camp for juniors saw a remarkable increase compared to Q2 2022 (+176%). Accounting for 49% of all junior student weeks in Q2 2023, their volume nearly reached Q2 2019 levels, being just 3% lower.

General English remained the most popular course type for juniors (at 51% of the total)). However, from like to like comparisons, the volume studying reached only 65% of Q2 2019 levels.

General English was indisputably also the most popular course for adults. It attracted 91% of all adult student weeks and reached 85% of Q2 2019 volume - a stronger overall recovery rate than any other adult course type.

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



n=125 centres participating in Q2 2023

The top 20 source countries in Q2 2023 accounted for 87% of the total student weeks.

Saudi Arabia continued to hold its position as the top source country, with 18,318 student weeks. This quarter, Italy had the greatest absolute growth in student weeks (+3,873 more than in Q2 2022), outperforming Brazil, Turkey and Switzerland to secure second place.

As observed in previous quarters, student weeks from traditionally strong junior source markets in Europe continued to grow. Four of the five top source countries for juniors were Italy, Spain, Austria, and France.

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