Q1 2024

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

QUIC **QUARTERLY INTELLIGENCE COHORT** SAMPLE

STUDENT STATISTICS REPORT **Q1 2024**

Prepared on behalf of:

ENGLISH UK

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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 2024, QUIC participants increased by five compared to Q1 2023, reaching 30 member centres. The current sample represents 50% 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 2023, 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

www.englishuk.com/quic
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GENERAL OVERVIEW
Q1 2024 AT A GLANCE

Table 1
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
	📋	%	Σ	%
London	10	33.0	10,000	33.0
South and South Eastern England	5	17.0	4,000	13.0
Northern England	5	17.0	4,500	15.0
South West England and the Channel Islands	3	10.0	4,000	13.0
Eastern England	3	10.0	4,000	13.0
Central England and Wales	2	7.0	2,000	7.0
Scotland and Northern Ireland	2	7.0	1,500	5.0
Total	**30**	**100.0**	**30,000**	**100.0**

Note: The number of participating teaching centre locations in Q1 2024 is 30. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and may 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.

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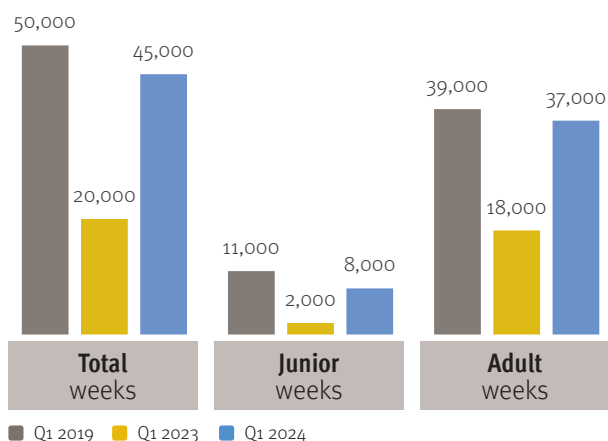Like-to-like comparison of student weeks by quarter

Total weeks: Q1 2019 = 50,000; Q1 2023 = 20,000; Q1 2024 = 45,000
Junior weeks: Q1 2019 = 11,000; Q1 2023 = 2,000; Q1 2024 = 8,000
Adult weeks: Q1 2019 = 39,000; Q1 2023 = 18,000; Q1 2024 = 37,000

■ Q1 2019 ■ Q1 2023 ■ Q1 2024

Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q1 2019 vs Q1 2024	-55%	-50%	-60%
Q1 2023 vs Q1 2024	+55%	+50%	+60%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=25 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
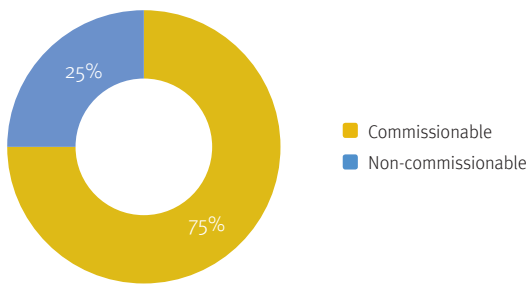
Commissionable
Non-commissionable

n=30 member centres participating in Q1 2024

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Chart 3
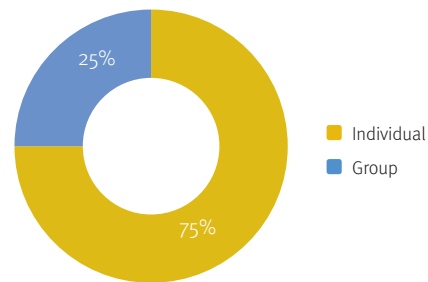Student weeks by booking type

Individual
Group

n=30 member centres participating in Q1 2024

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

Table 3
Change in proportion of student weeks by booking source based on like-to-like comparison

	Commissioned weeks	Non-commissioned weeks
Q1 2019	75%	25%
Q1 2023	75%	25%
Q1 2024	75%	25%

Table 4
Change in proportion of student weeks by booking type based on like-to-like comparison

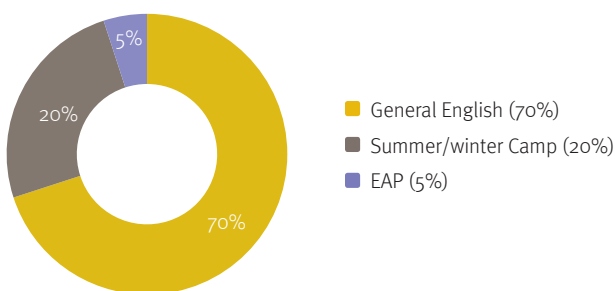|	Individual bookings	Group bookings
Q1 2019	75%	25%
Q1 2023	75%	25%
Q1 2024	75%	25%

Note: The figures in Tables 3 and 4 are based on data from centres reporting in all respective quarters (n=25 member centres).

GENERAL OVERVIEW
Q1 2024 AT A GLANCE

Chart 4
Student weeks by junior course types

- General English (70%)
- Summer/winter Camp (20%)
- EAP (5%)

n=30 member centres participating in Q1 2024

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Chart 5
Student weeks by adult course types

- General English (85%)
- Business & Professional English (1%)
- English Plus (1%)
- EAP (10%)
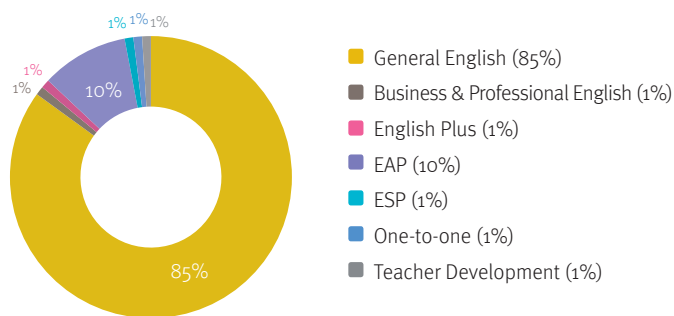- ESP (1%)
- One-to-one (1%)
- Teacher Development (1%)

n=30 member centres participating in Q1 2024

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Chart 6
Change in student weeks by course type

	Juniors			Adults						
	General English	Summer/Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development
Q1 2019	6,000	3,000	1,000	20,000	1,000	1,000	2,000	1,000	500	100
Q1 2023	3,000	1,500	100	10,000	300	300	1,000	300	400	50
Q1 2024	5,000	2,000	250	15,000	700	700	1,500	300	400	70
Q1 2019 vs Q1 2024	-50%	-50%	-50%	-50%	-50%	-50%	-50%	-50%	-50%	-50%
Q1 2023 vs Q1 2024	+75%	+75%	+75%	+75%	+75%	+75%	+75%	+75%	+75%	+75%

Note: The figures are based on data from centres reporting in all respective quarters (n=25 member centres).

Chart 7

Student weeks by age group and source country (top 20 markets)
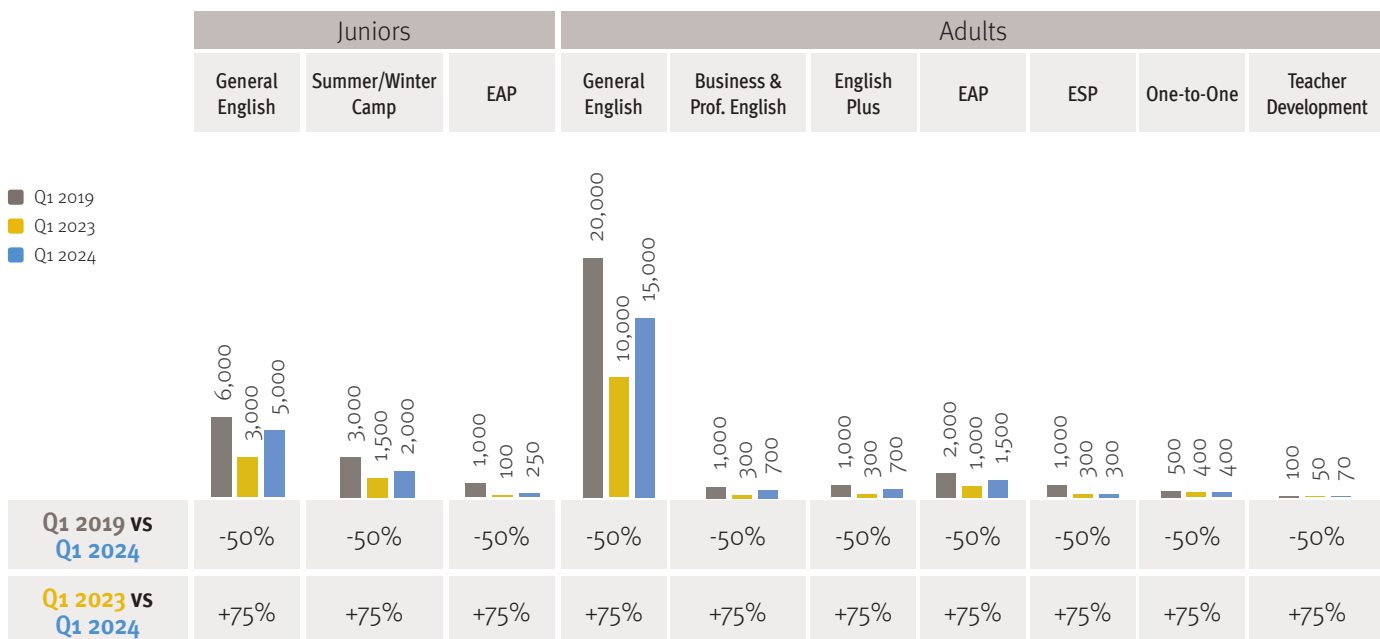

Legend: ■ Adults ■ Juniors

n=30 member centres participating in Q1 2024

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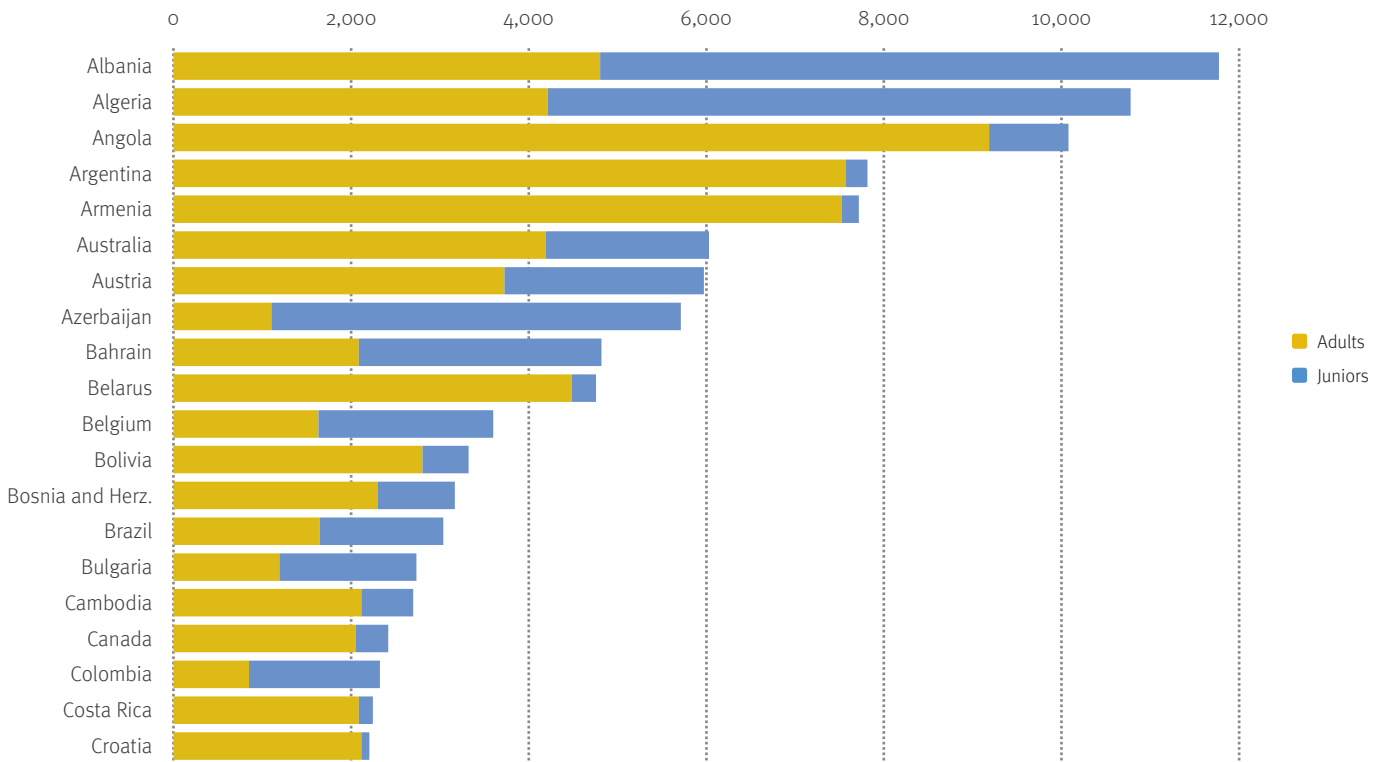
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Q1 2024

SECTOR RECOVERY

Table 5

Recovery level by source country (ranked by total student weeks)

Rank	Source country	Q1 2024 student week volume as a % of Q1 2019 volume
1	Albania	90%
2	Algeria	90%
3	Angola	120%
4	Argentina	120%
5	Armenia	120%
6	Australia	90%
7	Austria	90%
8	Azerbaijan	216%
9	Bahrain	90%
10	Belarus	90%
11	Belgium	120%
12	Bolivia	120%
13	Bosnia and	120%
14	Herzegovina	90%
15	Brazil	90%
16	Bulgaria	90%
17	Cambodia	90%
18	Canada	90%
19	Chile	90%
20	China	90%
21	Colombia	90%
22	Costa Rica	90%
23	Croatia	90%
24	Cyprus	90%
25	Czech Republic	90%

┆ 100% recovery level   ┆ over 200% recovery

Note: Based on data from centres reporting in both Q1 2019 and Q1 2024 (n=25 participating member centres) for a more accurate assessment of recovery level.

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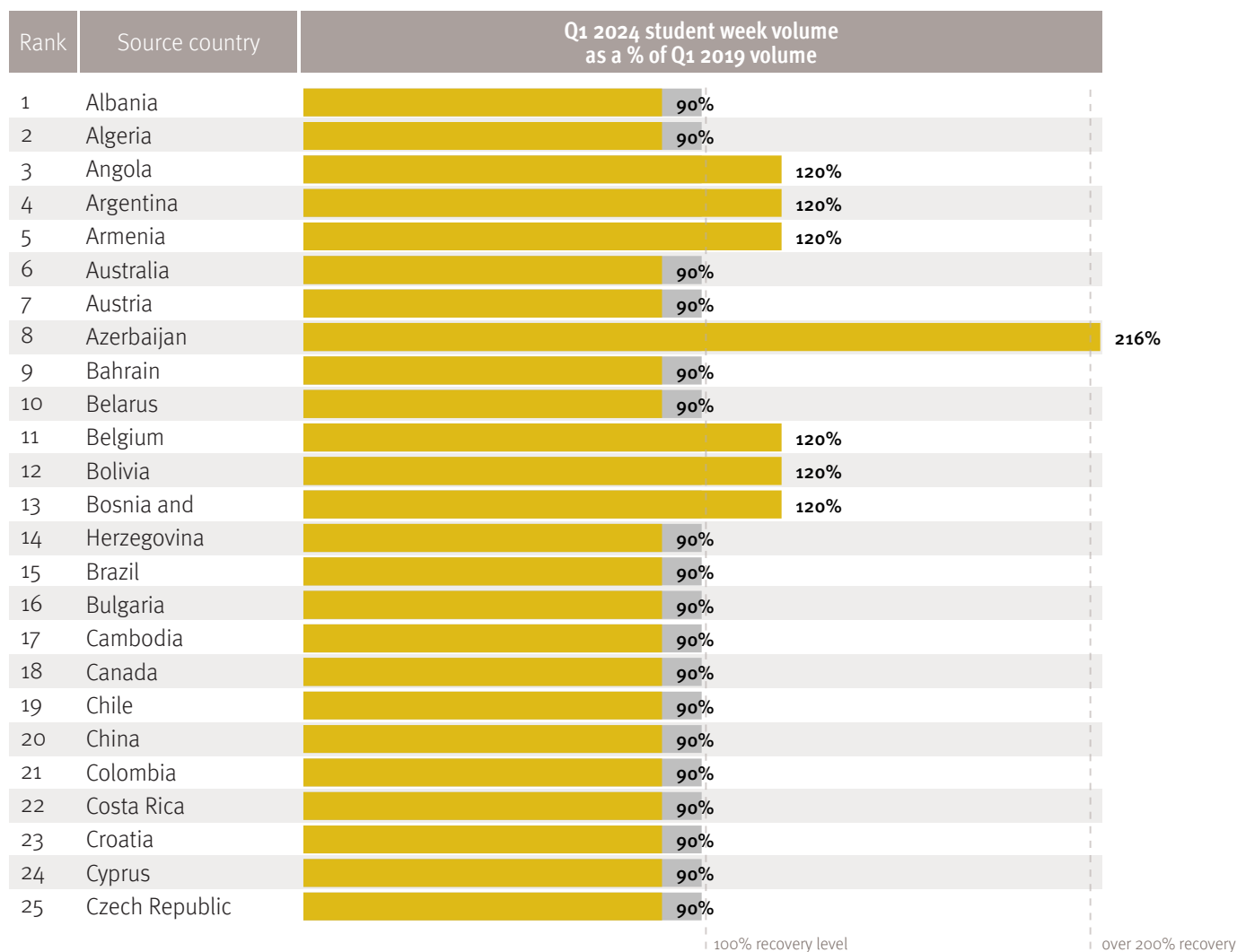
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Q1 2024

AGE SEGMENTS

Table 6

Student weeks by source country (ranked by total student weeks) and age group

- **Overall data** – performance of source markets based on statistics collected in Q1 2024 from the entire sample of QUIC membership (30);
- **Like-to-like comparison** – year-on-year benchmark for each age segment, based on data from centres reporting in both Q1 2023 and Q1 2024 (29 member centres) for a more accurate assessment of source market performance trends.

| | | Σ | | | | | | Like-to-like comparison Q1 2023 vs. Q1 2024 change | | |
| | | Total weeks | % | Junior weeks | % | Adult weeks | % | Total | Junior | Adult |
Rank	Source country	Overall data Q1 2024								
1	Albania	10	33.3	3	3.6	7	20.7	5	2	-3
2	Algeria									
3	Angola									
4	Argentina									
5	Armenia									
6	Australia									
7	Austria									
8	Azerbaijan									
9	Bahrain									
10	Belarus									
11	Belgium									
12	Bolivia									
13	Bosnia and Herzegovina									
14	Brazil									
15	Bulgaria									
16	Cambodia									
17	Canada									
18	Chile									
19	China									
20	Colombia									
21	Costa Rica									
22	Croatia									
23	Cyprus									
24	Czech Republic									
25	Denmark									
26	Ecuador									
27	Egypt									
28	Estonia									
29	Finland									

Note: Q1 2024 n=30 participating member centres, like-to-like comparison n=29 participating member centres.

Q1 2024

AGE SEGMENTS

Table 7

Top source countries of junior students by student weeks and their market share

Junior students			
Rank	Source country	Weeks	%
1	Albania	20,000	14.1
2	Algeria	20,000	14.1
3	Angola	18,000	12.7
4	Argentina	14,000	9.9
5	Armenia	10,000	7.0
6	Australia	8,500	6.0
7	Austria	8,000	5.6
8	Azerbaijan	6,000	4.2
9	Bahrain	6,000	4.2
10	Belarus	5,600	3.9
11	Belgium	5,000	3.5
12	Bolivia	4,000	2.8
13	Bosnia and Herzegovina	4,000	2.8
14	Brazil	3,000	2.1
15	Bulgaria	2,000	1.4
16	Cambodia	2,000	1.4
17	Canada	1,800	1.3
18	Chile	1,400	1.0
19	China	400	0.3
20	Colombia	200	0.1
	Other	2,000	1.4

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

Table 8
Top source countries of adult students by student weeks and their market share

Adult students			
Rank	Source country	Weeks	%
1	Albania	10,000	15.0
2	Algeria	10,000	15.0
3	Angola	10,000	15.0
4	Argentina	10,000	15.0
5	Armenia	5,000	7.5
6	Australia	5,000	7.5
7	Austria	2,900	4.3
8	Azerbaijan	2,000	3.0
9	Bahrain	1,500	2.2
10	Belarus	1,400	2.1
11	Belgium	1,000	1.5
12	Bolivia	1,000	1.5
13	Bosnia and Herzegovina	900	1.3
14	Brazil	899	1.3
15	Bulgaria	800	1.2
16	Cambodia	649	1.0
17	Canada	500	0.7
18	Chile	456	0.7
19	China	400	0.6
20	Colombia	400	0.6
	Other	2,000	3.0

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

Q1 2024
BOOKING SOURCES

Table 9
Student weeks by booking source (ranked by total student weeks)

ℹ Table 9 displays:
- **Overall data** based on statistics collected in Q1 2024 from the entire sample of QUIC membership (30);
- **Like-to-like comparison** based on data from centres reporting in both Q1 2023 and Q1 2024 (29 member centres) for a more accurate assessment of source market performance trends.

		Commissioned weeks	Non-commissioned weeks	C	NC	C	NC
Rank	Source country	Overall data Q1 2024		Like-to-like comparison Q1 2023 vs. Q1 2024 change			
1	Albania	80%	20%	70%	30%	80	30%
2	Algeria	80%	20%				
3	Angola	80%	20%				
4	Argentina	80%	20%				
5	Armenia	80%	20%				
6	Australia	80%	20%				
7	Austria	80%	20%				
8	Azerbaijan	80%	20%				
9	Bahrain	80%	20%				
10	Belarus	80%	20%				
11	Belgium	80%	20%				
12	Bolivia	80%	20%				
13	Bosnia and Herzegovina	80%	20%				
14	Brazil	80%	20%				
15	Bulgaria	80%	20%				
16	Cambodia	80%	20%				
17	Canada	80%	20%				
18	Chile	80%	20%				
19	China	80%	20%				
20	Colombia	80%	20%				
21	Costa Rica	80%	20%				
22	Croatia	80%	20%				
23	Cyprus	80%	20%				
24	Czech Republic	80%	20%				
25	Denmark	80%	20%				
26	Ecuador	80%	20%				
27	Egypt	80%	20%				
28	Estonia	80%	20%				
29	Finland	80%	20%				

Note: Q1 2024 n=30 participating member centres, like-to-like comparison n=29 participating member centres.

Q1 2024

BOOKING SOURCES

Table 10

Top source countries of commissionable bookings by student weeks and their market share

Commissionable bookings			
Rank	Source country	Weeks	%
1	Albania	20,000	14.1
2	Algeria	20,000	14.1
3	Angola	18,000	12.7
4	Argentina	14,000	9.9
5	Armenia	10,000	7.0
6	Australia	8,500	6.0
7	Austria	8,000	5.6
8	Azerbaijan	6,000	4.2
9	Bahrain	6,000	4.2
10	Belarus	5,600	3.9
11	Belgium	5,000	3.5
12	Bolivia	4,000	2.8
13	Bosnia and Herzegovina	4,000	2.8
14	Brazil	3,000	2.1
15	Bulgaria	2,000	1.4
16	Cambodia	2,000	1.4
17	Canada	1,800	1.3
18	Chile	1,400	1.0
19	China	400	0.3
20	Colombia	200	0.1
	Other	2,000	1.4

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

Table 11

Top source countries of non-commissionable bookings by student weeks and their market share

Non-commissionable bookings			
Rank	Source country	Weeks	%
1	Albania	10,000	15.0
2	Algeria	10,000	15.0
3	Angola	10,000	15.0
4	Argentina	10,000	15.0
5	Armenia	5,000	7.5
6	Australia	5,000	7.5
7	Austria	2,900	4.3
8	Azerbaijan	2,000	3.0
9	Bahrain	1,500	2.2
10	Belarus	1,400	2.1
11	Belgium	1,000	1.5
12	Bolivia	1,000	1.5
13	Bosnia and Herzegovina	900	1.3
14	Brazil	899	1.3
15	Bulgaria	800	1.2
16	Cambodia	649	1.0
17	Canada	500	0.7
18	Chile	456	0.7
19	China	400	0.6
20	Colombia	400	0.6
	Other	2,000	3.0

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

BONARD ENGLISH UK

Q1 2024
BOOKING TYPES

Table 12
Student weeks by source country (ranked by total student weeks) and booking type

ℹ Table 12 displays:
- **Overall data** based on statistics collected in Q1 2024 from the entire sample of QUIC membership (30);
- **Like-to-like comparison** based on data from centres reporting in both Q1 2023 and Q1 2024 (29 member centres) for a more accurate assessment of source market performance trends.

Rank	Source country	Individual bookings	Group bookings				
		Overall data Q1 2024		Like-to-like comparison Q1 2023 vs. Q1 2024 change			
1	Albania	80%	20%	70%	30%	80%	20%
2	Algeria	80%	20%				
3	Angola	80%	20%				
4	Argentina	80%	20%				
5	Armenia	80%	20%				
6	Australia	80%	20%				
7	Austria	80%	20%				
8	Azerbaijan	80%	20%				
9	Bahrain	80%	20%				
10	Belarus	80%	20%				
11	Belgium	80%	20%				
12	Bolivia	80%	20%				
13	Bosnia and Herzegovina	80%	20%				
14	Brazil	80%	20%				
15	Bulgaria	80%	20%				
16	Cambodia	80%	20%				
17	Canada	80%	20%				
18	Chile	80%	20%				
19	China	80%	20%				
20	Colombia	80%	20%				
21	Costa Rica	80%	20%				
22	Croatia	80%	20%				
23	Cyprus	80%	20%				
24	Czech Republic	80%	20%				
25	Denmark	80%	20%				
26	Ecuador	80%	20%				
27	Egypt	80%	20%				
28	Estonia	80%	20%				
29	Finland	80%	20%				

Note: Q1 2024 n=30 participating member centres, like-to-like comparison n=29 participating member centres.

Q1 2024

BOOKING TYPES

Table 13

Top source countries of individual bookings by student weeks and their market share

	Individual bookings		
Rank	Source country	Weeks	%
1	Albania	20,000	14.1
2	Algeria	20,000	14.1
3	Angola	18,000	12.7
4	Argentina	14,000	9.9
5	Armenia	10,000	7.0
6	Australia	8,500	6.0
7	Austria	8,000	5.6
8	Azerbaijan	6,000	4.2
9	Bahrain	6,000	4.2
10	Belarus	5,600	3.9
11	Belgium	5,000	3.5
12	Bolivia	4,000	2.8
13	Bosnia and Herzegovina	4,000	2.8
14	Brazil	3,000	2.1
15	Bulgaria	2,000	1.4
16	Cambodia	2,000	1.4
17	Canada	1,800	1.3
18	Chile	1,400	1.0
19	China	400	0.3
20	Colombia	200	0.1
	Other	2,000	1.4

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

Table 14
Top source countries of group bookings by student weeks and their market share

Group bookings			
Rank	Source country	Weeks	%
1	Albania	10,000	15.0
2	Algeria	10,000	15.0
3	Angola	10,000	15.0
4	Argentina	10,000	15.0
5	Armenia	5,000	7.5
6	Australia	5,000	7.5
7	Austria	2,900	4.3
8	Azerbaijan	2,000	3.0
9	Bahrain	1,500	2.2
10	Belarus	1,400	2.1
11	Belgium	1,000	1.5
12	Bolivia	1,000	1.5
13	Bosnia and Herzegovina	900	1.3
14	Brazil	899	1.3
15	Bulgaria	800	1.2
16	Cambodia	649	1.0
17	Canada	500	0.7
18	Chile	456	0.7
19	China	400	0.6
20	Colombia	400	0.6
	Other	2,000	3.0

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.

Q1 2024
PROGRAMME DATA

Table 15

Student weeks by source country (ranked by total student weeks) and course type

ℹ Table 15 displays **overall data** based on statistics collected in Q1 2024 from the entire sample of QUIC membership (30).

Rank	Source country	Juniors			Adults						
		General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher develop.
1	Albania	100	80	40	50	10	8	9	9	12	1
2	Algeria										
3	Angola										
4	Argentina										
5	Armenia										
6	Australia										
7	Austria										
8	Azerbaijan										
9	Bahrain										
10	Belarus										
11	Belgium										
12	Bolivia										
13	Bosnia and Herzegovina										
14	Brazil										
15	Bulgaria										
16	Cambodia										
17	Canada										
18	Chile										
19	China										
20	Colombia										
21	Costa Rica										
22	Croatia										
23	Cyprus										
24	Czech Republic										
25	Denmark										
26	Ecuador										
27	Egypt										
28	Estonia										
29	Finland										

Q1 2024
PROGRAMME DATA

Table 16
Student weeks by source country (ranked by total student weeks) and course type (like-to-like comparison)

ℹ Table 16 displays **like-to-like comparison** based on data from centres reporting in both Q1 2023 and Q1 2024 (29 member centres) for a more accurate assessment of source market performance trends.

		Juniors			Adults						
		General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher develop.
Rank	Source country	Q1 2023 vs. Q1 2024 change Like-to-like comparison (n=29 member centres)									
1	Saudi Arabia	40	30	0	80	20	-15	-35	55	12	1
2	Turkey										
3	Switzerland										
4	Kuwait										
5	Brazil										
6	South Korea										
7	Japan										
8	Italy										
9	France										
10	Colombia										
11	China										
12	Spain										
13	Germany										
14	Thailand										
15	Oman										
16	Taiwan										
17	Chile										
18	Mexico										
19	Ukraine										
20	Belgium										
21	Netherlands										
22	Russia										
23	Libya										
24	Argentina										
25	Peru										
26	Venezuela										
27	Austria										
28	Other Central America										
29	Ecuador										

Q1 2024
PROGRAMME DATA

Table 17
Top source countries by junior course type, student weeks and their market share

Rank	General English			Summer/Winter Camp			EAP		
	Source country	Weeks	%	Source country	Weeks	%	Source country	Weeks	%
1	Albania	20,000	25.5	Albania	20,000	25.5	Albania	20,000	25.5
2	Algeria	20,000	25.5	Algeria	20,000	25.5	Algeria	20,000	25.5
3	Angola	14,000	17.9	Angola	14,000	17.9	Angola	14,000	17.9
4	Argentina	10,000	12.8	Argentina	10,000	12.8	Argentina	10,000	12.8
5	Armenia	4,000	5.1	Armenia	4,000	5.1	Armenia	4,000	5.1
6	Australia	3,000	3.8	Australia	3,000	3.8	Australia	3,000	3.8
7	Austria	2,300	2.9	Austria	2,300	2.9	Austria	2,300	2.9
8	Azerbaijan	2,000	2.6	Azerbaijan	2,000	2.6	Azerbaijan	2,000	2.6
9	Bahrain	1,000	1.3	Bahrain	1,000	1.3	Bahrain	1,000	1.3
10	Belarus	599	0.8	Belarus	599	0.8	Belarus	599	0.8
	Other	1,400	1.8	Other	1,400	1.8	Other	1,400	1.8

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding. Figures of student weeks were rounded and may not add up to the total sum of student weeks by course type in Table 15.
Note: Junior student weeks on EAP courses came from only one source country.

Table 18
Top source countries by adult course type, student weeks and their market share

Rank	General English	Weeks	%	Business & Prof. English	Weeks	%	English Plus	Weeks	%
	Source country			Source country			Source country		
1	Albania	20,000	25.5	Albania	20,000	25.5	Albania	20,000	25.5
2	Algeria	20,000	25.5	Algeria	20,000	25.5	Algeria	20,000	25.5
3	Angola	14,000	17.9	Angola	14,000	17.9	Angola	14,000	17.9
4	Argentina	10,000	12.8	Argentina	10,000	12.8	Argentina	10,000	12.8
5	Armenia	4,000	5.1	Armenia	4,000	5.1	Armenia	4,000	5.1
6	Australia	3,000	3.8	Australia	3,000	3.8	Australia	3,000	3.8
7	Austria	2,300	2.9	Austria	2,300	2.9	Austria	2,300	2.9
8	Azerbaijan	2,000	2.6	Azerbaijan	2,000	2.6	Azerbaijan	2,000	2.6
9	Bahrain	1,000	1.3	Bahrain	1,000	1.3	Bahrain	1,000	1.3
10	Belarus	599	0.8	Belarus	599	0.8	Belarus	599	0.8
	Other	1,400	1.8	Other	1,400	1.8	Other	1,400	1.8

Rank	EAP	Wks	%	ESP	Wks	%	One-to-one	Wks	%	Teacher development	Wks	%
	Source country			Source country			Source country			Source country		
1	Albania	2,000	25.5	Albania	2,000	25.5	Albania	2,000	25.5	Albania	2,000	25.5
2	Algeria	2,000	25.5	Algeria	2,000	25.5	Algeria	2,000	25.5	Algeria	2,000	25.5
3	Angola	1,400	17.9	Angola	1,400	17.9	Angola	1,400	17.9	Angola	1,400	17.9
4	Argentina	1,000	12.8	Argentina	1,000	12.8	Argentina	1,000	12.8	Argentina	1,000	12.8
5	Armenia	400	5.1	Armenia	400	5.1	Armenia	400	5.1	Armenia	400	5.1
6	Australia	300	3.8	Australia	300	3.8	Australia	300	3.8	Australia	300	3.8
7	Austria	230	2.9	Austria	230	2.9	Austria	230	2.9	Austria	230	2.9
8	Azerbaijan	200	2.6	Azerbaijan	200	2.6	Azerbaijan	200	2.6	Azerbaijan	200	2.6
9	Bahrain	100	1.3	Bahrain	100	1.3	Bahrain	100	1.3	Bahrain	100	1.3
10	Belarus	59	0.8	Belarus	59	0.8	Belarus	59	0.8	Belarus	59	0.8
	Other	140	1.8	Other	140	1.8	Other	140	1.8	Other	140	1.8

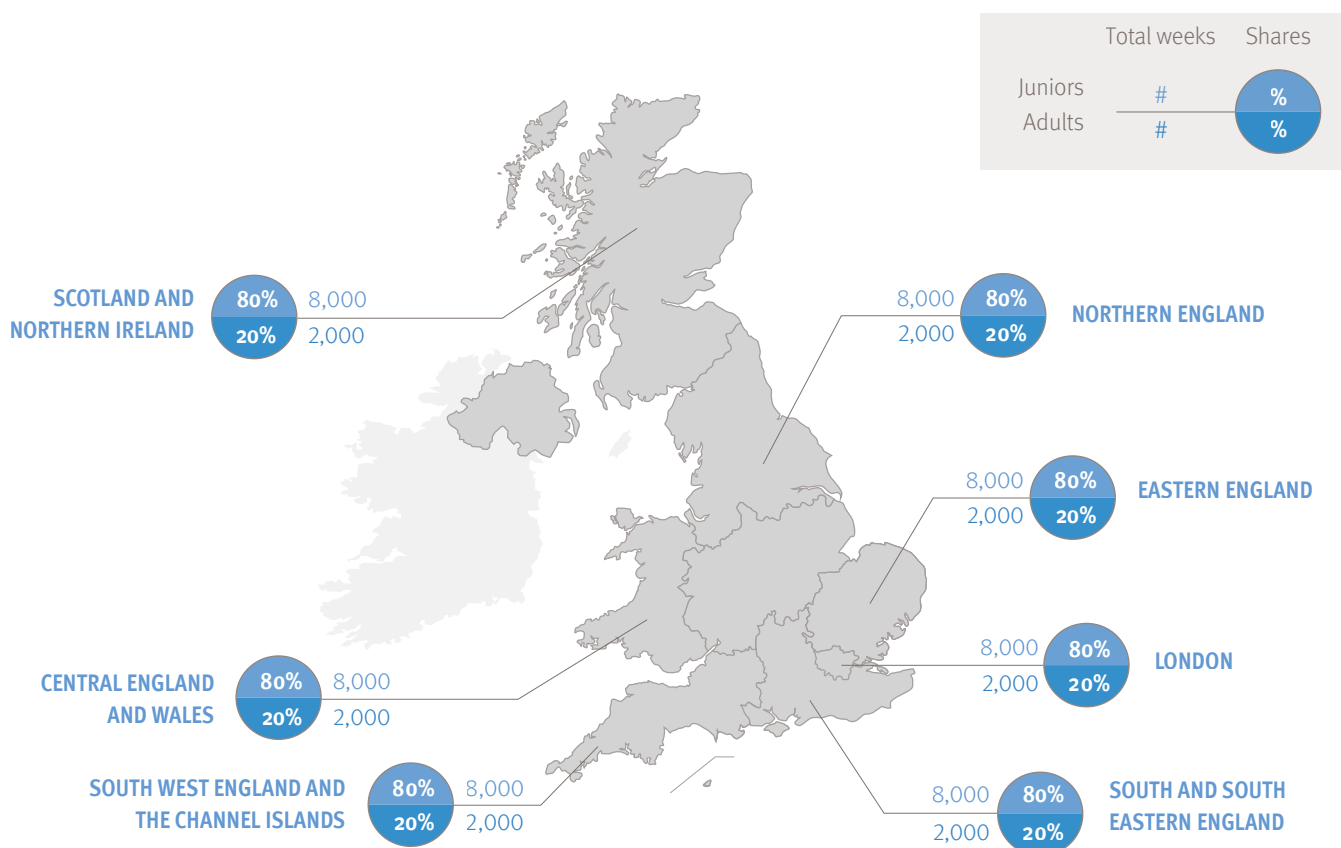n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding. Figures of student weeks were rounded and may not add up to the total sum of student weeks by course type in Table 15.

Q1 2024

REGIONAL ANALYSIS

Chart 8

Distribution of junior and adult student weeks by region

	Total weeks	Shares
Juniors	#	%
Adults	#	%

SCOTLAND AND NORTHERN IRELAND — 80% / 8,000, 20% / 2,000

NORTHERN ENGLAND — 8,000 / 80%, 2,000 / 20%

EASTERN ENGLAND — 8,000 / 80%, 2,000 / 20%

CENTRAL ENGLAND AND WALES — 80% / 8,000, 20% / 2,000

LONDON — 8,000 / 80%, 2,000 / 20%

SOUTH WEST ENGLAND AND THE CHANNEL ISLANDS — 80% / 8,000, 20% / 2,000

SOUTH AND SOUTH EASTERN ENGLAND — 8,000 / 80%, 2,000 / 20%

n=30 member centres participating in Q1 2024
Note: Figures of student weeks were rounded and may not add up to the total sum of student weeks by region in Table 1.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

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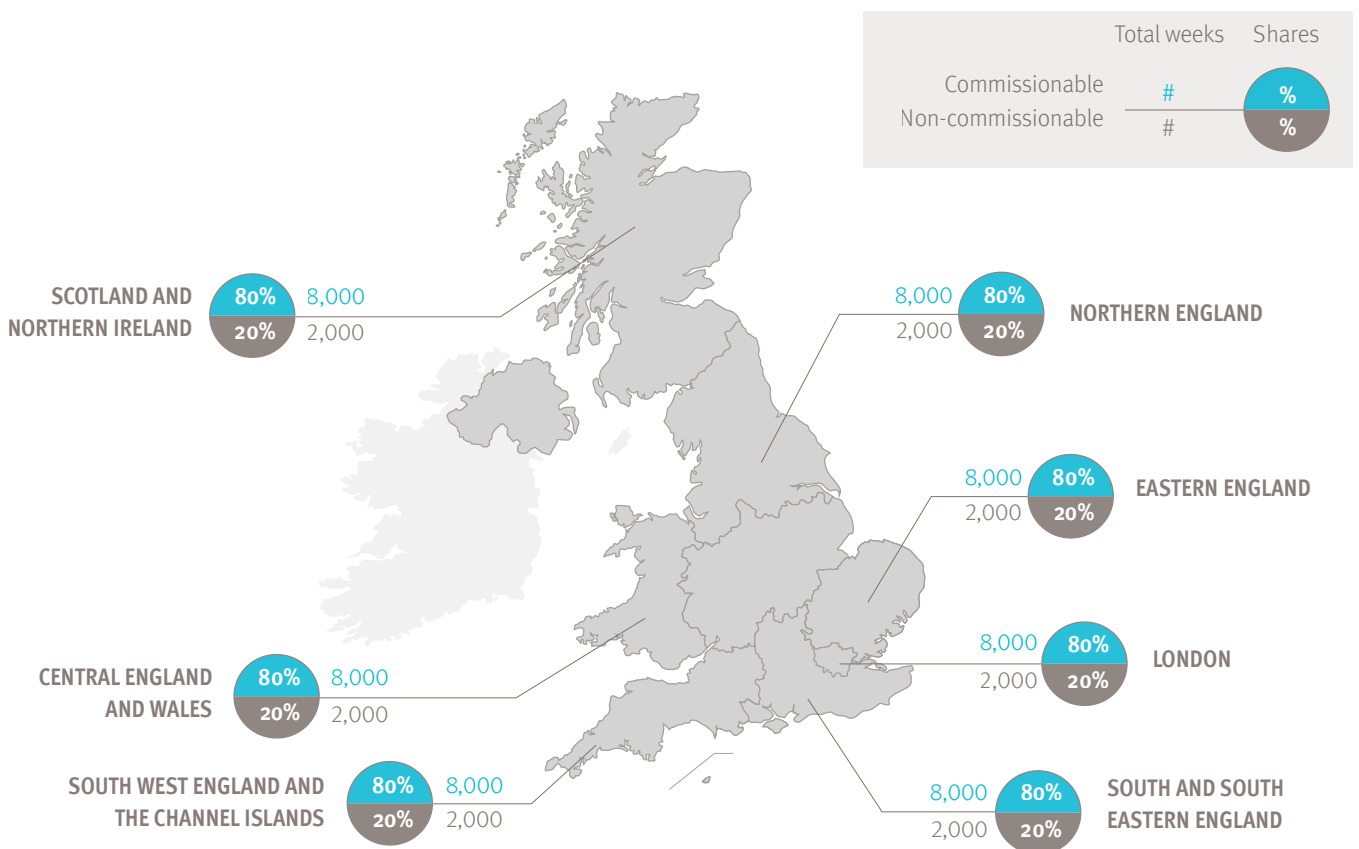
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BONARD

ENGLISH UK

Chart 9
Distribution of commissionable and non-commissionable student weeks by region

	Total weeks	Shares
Commissionable	#	%
Non-commissionable	#	%

SCOTLAND AND NORTHERN IRELAND — 80% 8,000 / 20% 2,000

NORTHERN ENGLAND — 8,000 80% / 2,000 20%

EASTERN ENGLAND — 8,000 80% / 2,000 20%

CENTRAL ENGLAND AND WALES — 80% 8,000 / 20% 2,000

LONDON — 8,000 80% / 2,000 20%

SOUTH WEST ENGLAND AND THE CHANNEL ISLANDS — 80% 8,000 / 20% 2,000

SOUTH AND SOUTH EASTERN ENGLAND — 8,000 80% / 2,000 20%

n=30 member centres participating in Q1 2024
Note: Figures of student weeks were rounded and may not add up to the total sum of student weeks by region in Table 1.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

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REGIONAL ANALYSIS

Table 19
Top source countries by region and their market share (student weeks)

Rank	Central England & Wales (%)		Eastern England (%)		London (%)		Northern England (%)	
	Source country	%	Source country	%	Source country	%	Source country	%
1	Albania	30.5	Albania	30.5	Albania	30.5	Albania	30.5
2	Algeria	13.0	Algeria	13.0	Algeria	13.0	Algeria	13.0
3	Angola	11.5	Angola	11.5	Angola	11.5	Angola	11.5
4	Argentina	5.5	Argentina	5.5	Argentina	5.5	Argentina	5.5
5	Armenia	4.5	Armenia	4.5	Armenia	4.5	Armenia	4.5
6	Australia	4.0	Australia	4.0	Australia	4.0	Australia	4.0
7	Austria	4.0	Austria	4.0	Austria	4.0	Austria	4.0
8	Azerbaijan	3.4	Azerbaijan	3.4	Azerbaijan	3.4	Azerbaijan	3.4
9	Bahrain	2.6	Bahrain	2.6	Bahrain	2.6	Bahrain	2.6
10	Belarus	2.3	Belarus	2.3	Belarus	2.3	Belarus	2.3
	Other	18.7	Other	18.7	Other	18.7	Other	18.7

Table 19 (continued)
Top source countries by region and their market share (student weeks)

Rank	Scotland & Northern Ireland		South & South Eastern England		South West England & The Channel Islands	
	Source country	%	Source country	%	Source country	%
1	Albania	30.5	Albania	30.5	Albania	30.5
2	Algeria	13.0	Algeria	13.0	Algeria	13.0
3	Angola	11.5	Angola	11.5	Angola	11.5
4	Argentina	5.5	Argentina	5.5	Argentina	5.5
5	Armenia	4.5	Armenia	4.5	Armenia	4.5
6	Australia	4.0	Australia	4.0	Australia	4.0
7	Austria	4.0	Austria	4.0	Austria	4.0
8	Azerbaijan	3.4	Azerbaijan	3.4	Azerbaijan	3.4
9	Bahrain	2.6	Bahrain	2.6	Bahrain	2.6
10	Belarus	2.3	Belarus	2.3	Belarus	2.3
	Other	18.7	Other	18.7	Other	18.7

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

REGIONAL ANALYSIS

Table 20
Student weeks by region and junior course type and their market share

Region	Juniors					
	General English		Summer/Winter Camp		EAP	
	Weeks	%	Weeks	%	Weeks	%
London	4,000	82.6	800	16.5	40	0.8
Northern England	3,400	86.3	500	12.7	40	1.0
South and South Eastern England	2,000	85.1	300	12.8	50	2.1
South West England and the Channel Islands	1,700	88.5	200	10.4	20	1.0
Eastern England	2,000	79.1	500	19.8	30	1.2
Central England and Wales	800	87.0	100	10.9	20	2.2
Scotland and Northern Ireland	500	87.7	50	8.8	20	3.5

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding. Figures of student weeks were rounded and may not add up to the total sum of student weeks by region in Table 1.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

Table 21

Student weeks by region and adult course type and their market share

	Adults 🏃					
	General English		Business & Prof. English		English Plus	
Region	Weeks	%	Weeks	%	Weeks	%
London	50,000	92.6	900	1.7	400	0.7
Northern England	40,000	90.8	200	0.5	300	0.7
South and South Eastern England	43,000	95.6	400	0.9	50	0.1
South West England and the Channel Islands	8,000	88.4	500	5.5	200	2.2
Eastern England	7,000	93.7	100	1.3	100	1.3
Central England and Wales	6,000	94.3	50	0.8	50	0.8
Scotland and Northern Ireland	1,000	63.7	30	1.9	100	6.4

	Adults 🏃							
	EAP		ESP		One-to-one		Teacher develop.	
Region	Weeks	%	Weeks	%	Weeks	%	Weeks	%
London	2,000	3.7	500	0.9	100	0.2	90	0.2
Northern England	3,000	6.8	300	0.7	170	0.4	80	0.2
South and South Eastern England	1,000	2.2	430	1.0	30	0.1	70	0.2
South West England and the Channel Islands	50	0.6	200	2.2	40	0.4	60	0.7
Eastern England	70	0.9	100	1.3	60	0.8	40	0.5
Central England and Wales	100	1.6	100	1.6	10	0.2	50	0.8
Scotland and Northern Ireland	300	19.1	100	6.4	10	0.6	30	1.9

n=30 member centres participating in Q1 2024
Note: Percentages may not add up to 100% due to rounding. Figures of student weeks were rounded and may not add up to the total sum of student weeks by region in Table 1.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

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