QUIC
QUARTERLY INTELLIGENCE COHORT

Executive summary

2021

Including Q1 – Q4 overview

ENGLISH UK

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2021 Summary
Introduction

Market research is a fundamental tool for measuring the impact of Covid-19 and benchmarking the road to recovery in the future.

As part of its commitment to supporting members, English UK is continuing with a modified version of the optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC). As in the previous edition, the 2021 report, of which this is the executive summary, reflects the impact of Covid-19 and focuses on tracking key indicators across the quarters. The integrity of future reporting was protected by collecting the full data set from 124 participating English UK members. The cohort represents 36% of the overall membership. The market intelligence contained will provide a baseline to monitor and understand the pattern of recovery for the sector in 2022 and beyond.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm, UNWTO Affiliate Member and member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence remains exact, precise and reliable.

To reflect the diverse nature of the UK English language teaching (ELT) sector, data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges in both the private and state sector.

The 2021 summary report features both quarterly overviews and annualised results, focusing on breakdowns by nationality, age and region. In addition, it uses information sourced from an online member survey which examined online teaching delivery in 2021. Compared to a supplementary survey conducted in 2020, this year's questionnaire had a greater focus on standalone online products which would have been delivered online regardless of Covid-19. The full findings of the survey will be presented and shared with QUIC members in a separate document to follow this report.

This year, we are also re-implementing a historical comparative analysis of overall figures and breakdowns by source country.

Enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort. For 2021, these accompanying pivot tables cover each individual quarter as well as the cumulative year, supplied to participants 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.

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Table 1
QUIC 2021 region summary – operational teaching centre locations by quarter

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
		%		%		%		%		%
London	22	25.6%	22	25.0%	23	23.7%	22	23.4%	89	24.4%
South and South Eastern England	19	22.1%	18	20.5%	23	23.7%	21	22.3%	81	22.2%
Northern England	17	19.8%	17	19.3%	18	18.6%	19	20.2%	71	19.5%
South West England and The Channel Islands	13	15.1%	16	18.2%	16	16.5%	15	16.0%	60	16.4%
Eastern England	8	9.3%	8	9.1%	10	10.3%	10	10.6%	36	9.9%
Central England and Wales	4	4.7%	4	4.5%	4	4.1%	4	4.3%	16	4.4%
Scotland and Northern Ireland	3	3.5%	3	3.4%	3	3.1%	3	3.2%	12	3.3%
Total	**86**	**100%**	**88**	**100%**	**97**	**100%**	**94**	**100%**	**365**	**100%**

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.

In 2021, 124 English UK member centres signed up for the QUIC scheme. Due to the impact of the Covid-19 pandemic, 19 of these (mainly seasonal multi-centre accreditations) remained closed during the whole year.

The participating members represented 261 teaching centre locations, with the number of operational locations across the quarters varying from 86 to 97.

A total of 190,939 student weeks was recorded by participating members in 2021. Of these, 98% were represented by adults (187,362 student weeks) and 2% by juniors (3,576 student weeks).

Note: The figures of total student weeks for adults and juniors were rounded and do not add up to the total sum of student weeks.

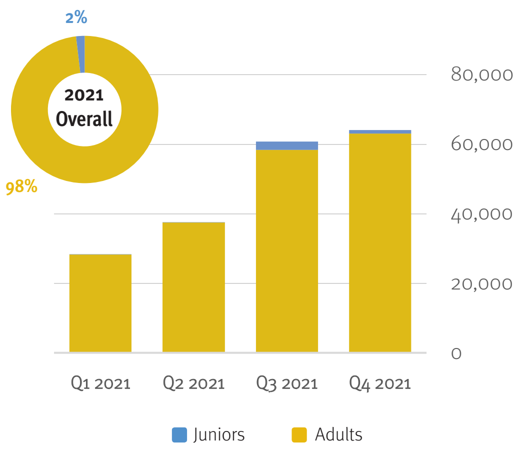
Analysis of the distribution of student weeks in individual quarters of 2021 shows a growth from 28,389 weeks in Q1 to 64,099 in Q4.

The proportion of junior student weeks shifted from 0.2% in the first quarter of 2021 to 4% in the third quarter, which is traditionally the strongest period for this age band. However, the contrast to pre-pandemic years is striking. In 2019, every fourth student week was booked by a junior student.

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

2021 Summary
Overview

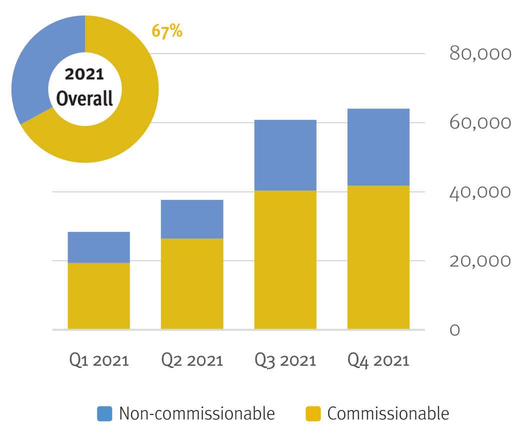
Chart 1
Student weeks by quarter and age group



Note: The figures in Chart 1 relate to data from centres reporting in all four quarters of 2021 (n=124 centres).

The proportion of student weeks booked via a commissionable source in 2021 stood at 67%, varying from 70% to 65% across the quarters.

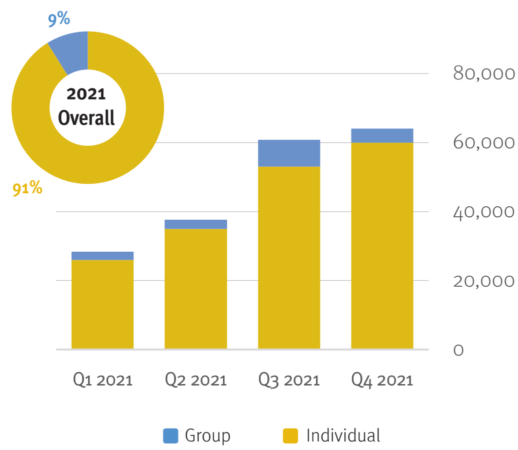
Chart 2
Student weeks by quarter and booking source



Note: The figures in Chart 2 relate to data from centres reporting in all four quarters of 2021 (n=124 centres).

Over nine in ten student weeks delivered in 2021 were booked individually. The highest share of group bookings (13%) was recorded in the third quarter of 2021, correlating with a bigger share of junior bookings in this period.

Chart 3
Student weeks by quarter and booking type



Note: The figures in Chart 3 relate to data from centres reporting in all four quarters of 2021 (n=124 centres).
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

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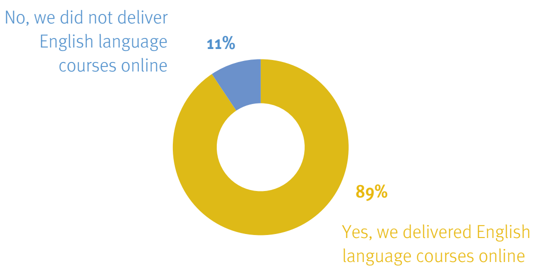
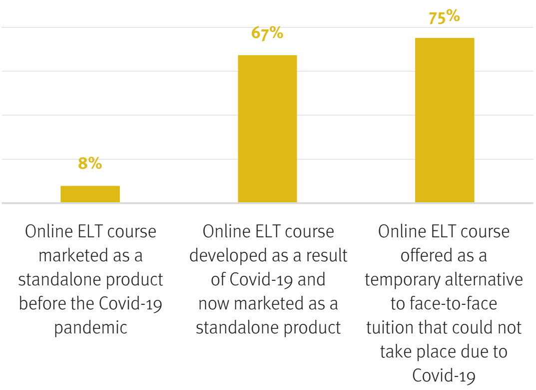
Chart 4
Centres by delivery of English language courses online in 2021



n=100 centres

Chart 5
Online tuition delivered in 2021



n=89 centres
Note: Multiple choice question

A supplementary online survey among QUIC members showed that 89% of centres provided some form of English language teaching online in 2021. Of these centres, 75% did so to provide an alternative form of tuition due to Covid-19 restrictions, i.e., ‘Emergency Remote Teaching’.

At the same time, 67% of members developed a standalone online ELT course in response to Covid-19, whereas 8% of centres were already marketing a standalone online ELT course before the pandemic.

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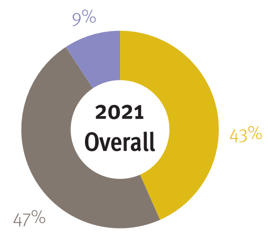
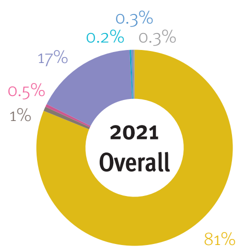
Chart 6
Student weeks by quarter and junior course types



Period	General English	Summer/ Winter Camp	EAP
Q1 2021	51%	32%	18%
Q2 2021	58%	11%	31%
Q3 2021	27%	69%	4%
Q4 2021	80%	1%	19%

Chart 7
Student weeks by quarter and adult course types



Period	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development
Q1 2021	82%	1%	0.3%	15%	0.2%	0.3%	1%
Q2 2021	80%	1%	0.2%	19%	0.2%	0.2%	< 0.1%
Q3 2021	75%	1%	0.4%	23%	0.1%	0.3%	0.1%
Q4 2021	87%	1%	1%	10%	0.4%	0.4%	0.1%

Note: The figures in Charts 6 and 7 relate to data from centres reporting in all four quarters of 2021 (n=124 centres).
Note: Percentages do not add up to 100% due to rounding.

The major decline in junior student weeks in 2021 translated to a different distribution of course type shares to that seen in 2020. The importance of General English for juniors decreased, with this programme type accounting for 43% of all student weeks booked in 2021.

Summer/Winter Camps generated 47% of overall student weeks and their share was most noticeable in Q3 (69%). This is a shift back to the pattern seen in pre-pandemic years when Summer/Winter Camps traditionally dominated in the third quarter.

English for Academic Purposes for juniors registered 332 student weeks in 2021.

General English was the strongest of all the adult language courses in 2021, accounting for 81% of all student weeks and reaching its highest share in Q4, at 87% of student weeks.

The second most popular, English for Academic Purposes, produced 17% of student weeks in 2021. It performed most strongly in the third quarter, when it recorded 23% of all student weeks.

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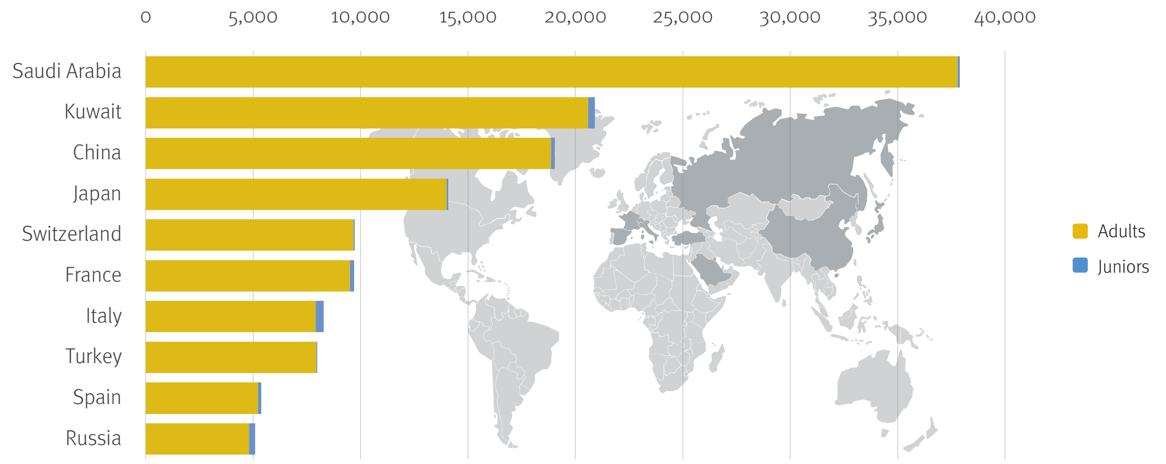
Chart 8

Student weeks by age group and source country (top 10 markets) in 2021



Note: The figures in Chart 8 relate to data from centres reporting in all four quarters of 2021 (n=124 centres).

The nationality mix in the highest ranks for 2021 was different to that seen in pre-pandemic years. Previously strong European source countries (e.g., Italy and Spain) lost out to the top Middle Eastern markets.

Saudi Arabia remained the most represented source market in 2021. Overall, 37,894 student weeks were booked from this country, growing from 5,200 weeks in Q1 to 13,875 in Q4. Kuwait ranked second and recorded 20,905 student weeks (98% of them adult).

Ukraine became the top source country for juniors in 2021, with 689 student weeks. The Ukrainian market outpaced Italy, which usually occupies the top spot in the under-18 category. In 2021, Italy delivered 377 junior student weeks.

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