QUIC
QUARTERLY INTELLIGENCE COHORT

ENGLISH UK

Executive summary

Q2 2022

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englishuk.com/quic

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Q2 2022

Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information.

As in the pre-pandemic years, our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), continues on a quarterly basis. It introduces features not available in our annual student statistics reports and this is the executive summary of the second report in the 2022 series.

QUIC provides an in-depth analysis of the UK English language teaching (ELT) industry's source markets. Whilst the executive summaries are made publicly available, the full reports are exclusive to QUIC members, who can use them to benchmark their performance and monitor market trends.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm 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.

Members can be confident in the robustness of this quarter two (Q2) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Of the 120 centres initially participating in QUIC 2022, one has withdrawn from the scheme and one joined in in the second quarter; thus, the Q2 cohort remained the same. 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.

Having collected the full data set from participating members in 2021, it was possible to return to featuring a historical comparative analysis not only of overall figures but also by various breakdowns.

The enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort in the form of the accompanying pivot tables. 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 visit www.englishuk.com/quic or 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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Overview

Table 1
QUIC region summary

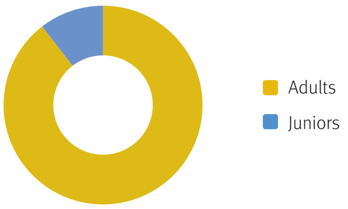
Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
South and South Eastern England	34	28.8%	22,741	21.5%
London	28	23.7%	36,233	34.3%
Northern England	21	17.8%	20,246	19.2%
South West England and The Channel Islands	17	14.4%	13,042	12.3%
Eastern England	10	8.5%	8,768	8.3%
Central England and Wales	4	3.4%	2,339	2.2%
Scotland and Northern Ireland	4	3.4%	2,291	2.2%
Total	118	100.0%	105,661	100.0%

Note: The number of participating member centre locations in Q2 2022 is 118. 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.

Q2 2022
Overview

A total of 120 English UK member centres registered for the QUIC scheme in Q2 2022, representing 228 teaching centre locations. This quarter 118 teaching centre locations were operational and recorded a total of 105,661 student weeks.

Chart 1
Student weeks by age group



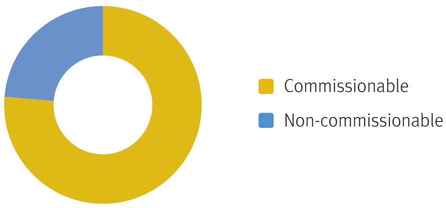
Junior students accounted for 10% of all student weeks (11,070) in Q2 2022. This is a considerable jump from the proportion of junior student weeks recorded during the same period last year (0.4%, or 132 weeks). Teaching centres recorded 94,590 adult student weeks. The year-on-year comparison below, which draws data from 119 centres participating in both quarters, reveals a increase in the total number of student weeks (+152%). Both adult (+181%) and junior (+8,286%) students weeks increased.

Period	Total weeks	Junior weeks	%	Adult weeks	%
Q2 2021	37,608	132	0.4%	37,476	100%
Q2 2022	105,658	11,070	10%	94,587	90%
Change	+181%	+8,286%		+152%	

Note: The figures relate to a like-to-like comparison, which is based on data from centres reporting in both Q2 2021 and Q2 2022 (n=119 centres).

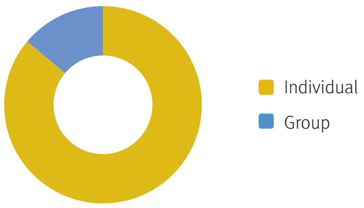
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



In Q2 2022, over three in four student weeks were commissionable.

Chart 3
Student weeks by booking type



The share of student weeks accounted for by group bookings doubled between 2021 and 2022, reaching 14% in Q2 2022.

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

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Chart 4
Student weeks by junior course types

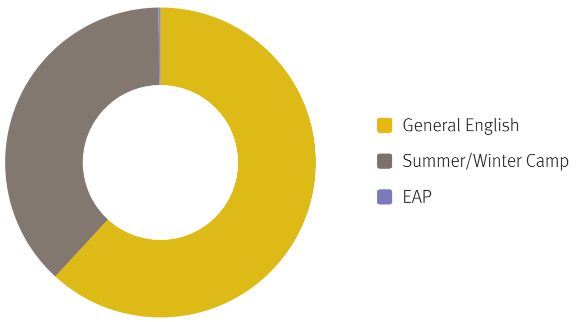
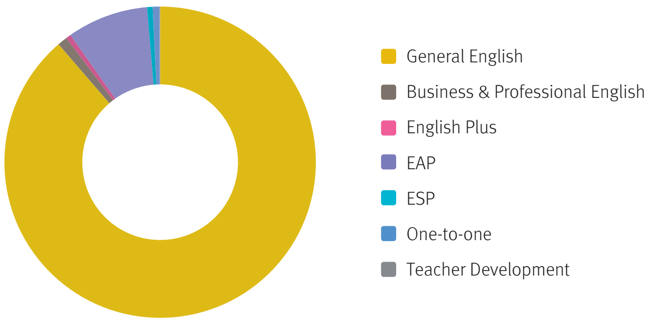


Chart 5
Student weeks by adult course types



Student weeks in General English courses for juniors and Summer/Winter Camps saw an increase between Q2 2021 and Q2 2022 (+6,771 and +4,183 student weeks, respectively). General English courses accounted for 62% of junior student weeks, and Summer/Winter Camps for 38%.

Student weeks for all types of adult courses grew between Q2 2021 and Q2 2022. General English was still the most popular course type, accounting for almost nine in ten student weeks (89%). EAP courses accounted for 8% of student weeks, representing a modest increase of 13% on Q2 2021.The remaining 3% of student weeks were spread out across all other adult course types.

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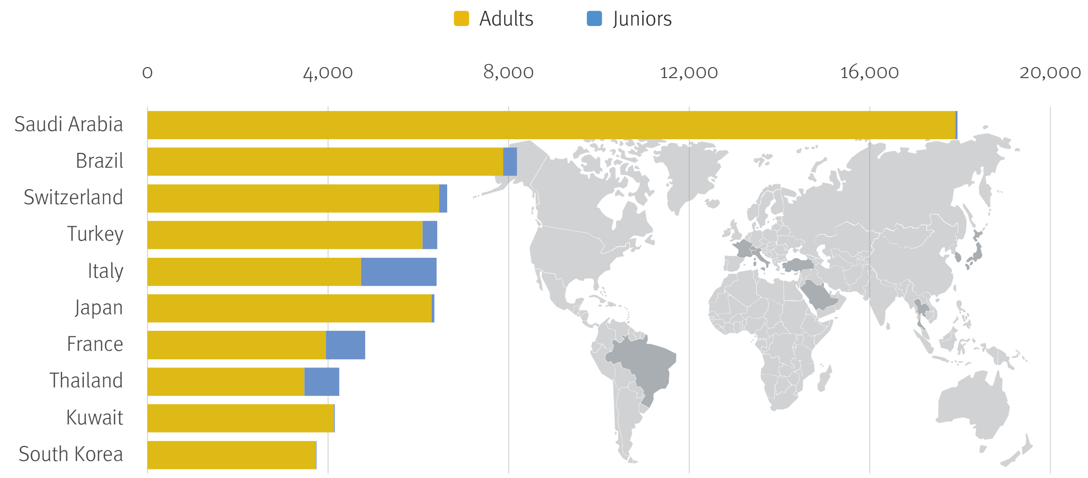
Chart 6
Student weeks by age group and source country (top 10 markets)



In Q2 2022, the performance of major source markets varied.

Saudi Arabia kept its usual top position in the overall ranking, dwarfing all other source countries with 17,941 student weeks. It was followed by Brazil (8,179 student weeks), Switzerland (6,455) and Turkey (6,420), all strong adult source markets.

Climbing from eighth in Q2 2021 to fifth position in the ranking, Italy, a traditionally strong source market (ranked second in Q2 2019), accounted for 6,406 student weeks in total, 1,680 of which were spent by junior students.

The second most significant junior market in Q2 2022 after Italy was Spain, with 1,348 junior student weeks (a 12% increase from Q2 2021).

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