QUIC

QUARTERLY INTELLIGENCE COHORT

Market Report

Q3 2018

ENGLISH UK

englishuk.com/quic

Prepared on behalf of:

ENGLISH UK

English UK Ltd
London, United Kindom | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

studentmarketing
YOUTH TRAVEL CONSULTANCY

StudentMarketing Ltd.
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.student-market.com | research@student-market.com

Q3 2018
Introduction

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

This is the third report in the 2018 series of our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), which introduces features not available in our existing annual student statistics reports.

QUIC provides in-depth, quarterly analysis of the UK English language teaching (ELT) industry's source markets. The full reports are available only to QUIC members, who can use them to benchmark their performance and monitor market trends. Membership is on a rolling annual basis, and all English UK centres can join the 2019 cohort up until March 2019. An executive summary will be made publicly available.

Added value has been achieved through the outsourcing of data processing to StudentMarketing, an independent market research firm and UNWTO Affiliate Member. StudentMarketing is also a member of ESOMAR World Research. The cleaning and fine-tuning of the data to international research standards means that the market intelligence is more exact, more precise and therefore more reliable than ever before. Members can be confident in the robustness of this quarter three (Q3) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Last year's QUIC cohort has been strengthened by the addition of 20 new members, taking total membership for 2018 to 144 centres. The cohort in Q3 2018 was 142 members. Of the 144 centres initially participating in QUIC in 2018, one has closed down and one withdrew from the scheme in Q2 2018. The current sample represents one third of the overall membership. 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.

In addition to the quantitative expansion of the sample, this year we are also implementing new components, namely:

- representation of Northern Ireland;
- regional classification of individual multi-centre locations;
- breakdown of student weeks by booking type;
- more detailed breakdown of adult course types;
- breakdown of junior course types;
- regional analysis of student weeks by course type;
- historical comparative analysis of overall figures, and in breakdowns by source country.

As the scheme continues its second year, we have been able to include comparative historical analysis which adds a new depth to the data. Further improvements, such as sectoral analysis or deeper regional insight, may be possible in future if the cohort becomes more representative, or if additional member data is sought.

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.

Q3 2018
Overview

Table 1
QUIC region summary

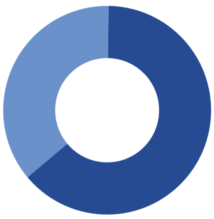
Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
South and South Eastern England	71	30.1%	87,922	22.2%
London	49	20.8%	94,983	23.9%
Eastern England	33	14.0%	44,410	11.2%
Northern England	31	13.1%	80,066	20.2%
South West England and The Channel Islands	28	11.9%	63,326	16.0%
Central England and Wales	14	5.9%	10,599	2.7%
Scotland and Northern Ireland	10	4.2%	15,477	3.9%
Total	**236**	**100.0%**	**396,783**	**100.0%**

Note: Percentages do not add up to 100% due to rounding.
Note: Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment. Similarly, Northern Ireland was merged with Scotland.
Note: The number of participating member centres in Q3 2018 is 142. The number of returns differs per quarter and depends on when teaching premise locations are operational.

The 142 English UK member centres reported a total of 396,783 student weeks in Q3 2018. Altogether, they represented 236 teaching centre locations.

In total, 64% of student weeks were spent by adults (252,592). The volume of junior student weeks was considerably greater in Q3 (36%, 144,191) than in the first (12%, 20,844) and second quarter (15%, 28,201) of 2018, underlining the importance of seasonality in this age segment.

Chart 1
Student weeks by age group



Of the 114 centres which contributed to quarterly reporting in Q3 2017 as well as Q3 2018, 59% reported a decrease in student weeks. This translated into a drop of total student weeks (-3.9%). The decline was more significant in the junior (-7.5%) than the adult cohort (-2.2%).

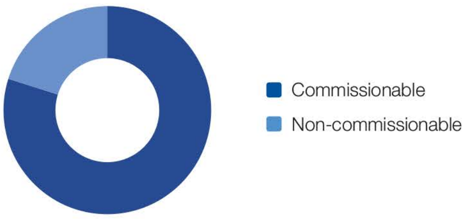
Period	Total weeks	Junior weeks	%	Adult weeks	%
Q3 2017	346,561	113,702	33%	232,859	67%
Q3 2018	333,001	105,149	32%	227,852	68%
Change	-3.9%	-7.5%		-2.2%	

n=114 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).

Q3 2018
Overview

Chart 2
Student weeks by booking source

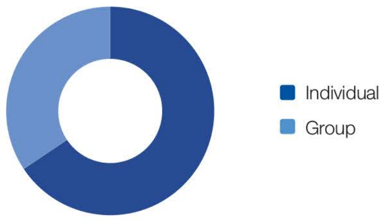


Four of five student weeks were booked through a commissionable source (80%, 316,884). The proportion of booking sources between Q3 2017 and Q3 2018 has shifted towards commissionable bookings, as is shown below:

	Commissioned weeks	**Non-commissioned** weeks
[illegible]	[illegible]	[illegible]

n=114 centres

Chart 3
Student weeks by booking type



Group bookings in the third quarter of 2018 represented 34% of all student weeks (136,492). This type of booking, coinciding with a higher share of juniors in Q3, was more common than in the previous quarters (19% in Q1 and 21% in Q2 2018).

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

Q3 2018 Overview

Chart 4
Student weeks by junior course types

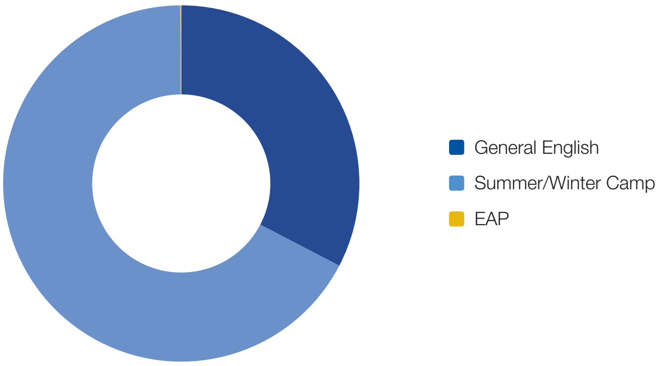
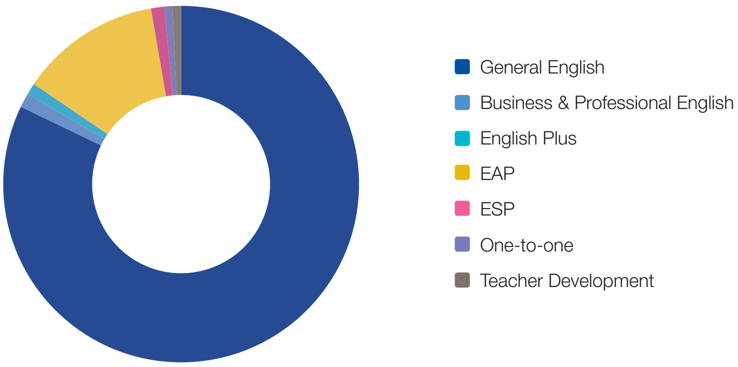


Chart 5
Student weeks by adult course types



The majority of junior weeks were spent in summer camp programmes (67%). Each third junior week was enrolled in a General English course (33%). English for Academic Purposes was not popular among juniors in this period of the year (<1%).

The most popular adult course type remained General English (82% of adult student weeks). English for Academic Purposes courses accounted for 13%, while the other course types represented not more than 1%.

Q3 2018
Overview

Chart 6
Student weeks by age group and source country (top 20 markets)

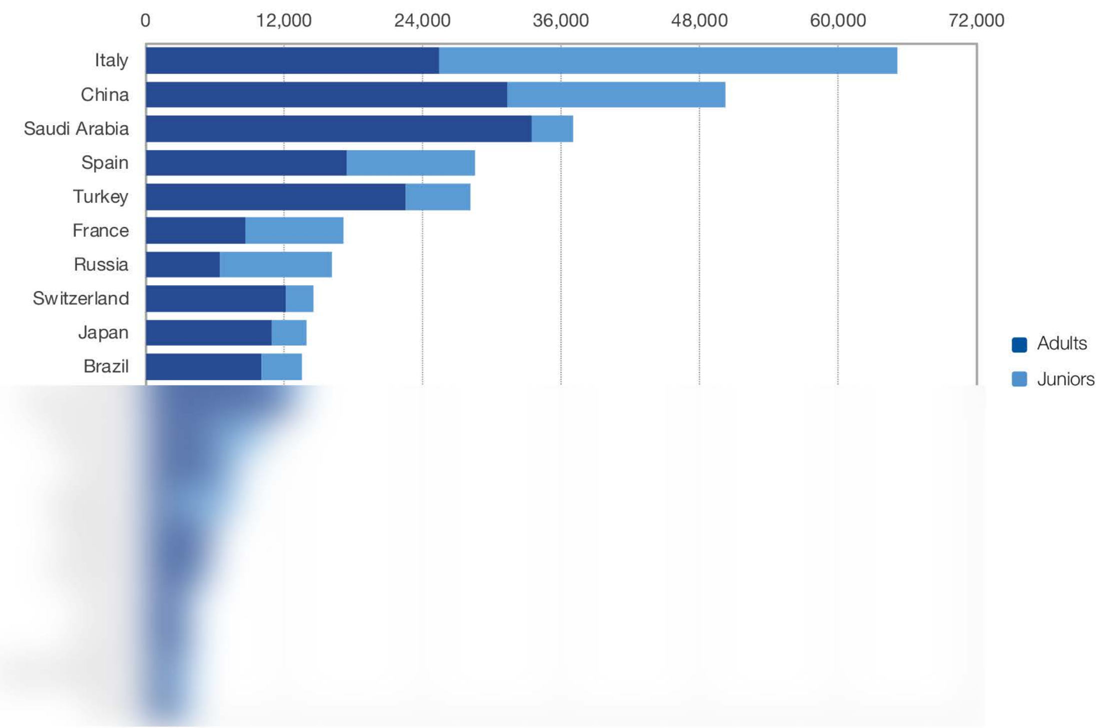


Table 2 features:

- **Overall data** – performance of source markets based on statistics collected in Q3 2018 from the entire sample of QUIC membership (142 member centres with 236 teaching premise locations);
- **Like-to-like comparison** – year-on-year benchmark for each age segment, based on data from centres reporting in both Q3 2017 and Q3 2018 (114 centres) for a more accurate assessment of source market performance trends.

Q3 2018
Age Segments

Table 2
Student weeks by source country (ranked by total student weeks) and age group

Rank	Source country	Total weeks	%	Junior weeks	%	Adult weeks	%	Total	Junior	Adult
		Overall data (n=142 centres) Q3 2018						Like-to-like comparison (n=114 centres) Q3 2017 vs. Q3 2018 change		

Q3 2018
Age Segments

Table 2

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

Rank	Source country	Total weeks	Total %	Junior weeks	Junior %	Adult weeks	Adult %	Total	Junior	Adult
		Overall data (n=142 centres) Q3 2018						**Like-to-like comparison (n=114 centres)** Q3 2017 vs. Q3 2018 change		

Q3 2018

Age Segments

Table 2

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

Rank	Source country	Total weeks	Total %	Junior weeks	Junior %	Adult weeks	Adult %	Total	Junior	Adult
		Overall data (n=142 centres) Q3 2018						Like-to-like comparison (n=114 centres) Q3 2017 vs. Q3 2018 change		

Q3 2018
Age Segments

Table 2
Student weeks by source country (ranked by total student weeks) and age group (cont.)

Rank	Source country	Total weeks	%	Junior weeks	%	Adult weeks	%	Total	Junior	Adult
		Overall data (n=142 centres) Q3 2018						**Like-to-like comparison (n=114 centres)** Q3 2017 vs. Q3 2018 change		

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks per source country were rounded and do not add up to the total sum of student weeks.

Q3 2018

Age Segments

Table 3

Top source countries of junior students by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks were rounded and do not add up to the total sum of junior student weeks in Table 2.

Q3 2018
Age Segments

Table 4
Top source countries of adult students by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%

Note: Percentages do not add up to 100% due to rounding.

Table 5 displays:

- **Overall data** based on statistics collected in Q3 2018 from the entire sample of QUIC membership (142 member centres with 236 teaching premise locations);
- **Like-to-like comparison** based on data from centres reporting in both Q3 2017 and Q3 2018 (114 centres) for a more accurate assessment of source market performance trends.

Q3 2018
Booking Sources

Table 5

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

Rank	Source country	**Commissioned** weeks	**Non-commissioned** weeks	**C**	**NC**	**C**	**NC**
		Overall data (n=142 centres) Q3 2018		**Like-to-like comparison (n=114 centres)** Q3 2017		vs. Q3 2018	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Q3 2018
Booking Sources

Table 5
Student weeks by booking source (ranked by total student weeks, cont.)

Rank	Source country	Commissioned weeks	Non-commissioned weeks	C	NC	C	NC
		Overall data (n=142 centres) Q3 2018		Like-to-like comparison (n=114 centres) Q3 2018		vs. Q3 2018	

Q3 2018
Booking Sources

Table 5
Student weeks by booking source (ranked by total student weeks, cont.)

Rank	Source country	Commissioned weeks	Non-commissioned weeks	C	NC	C	NC
		Overall data (n=142 centres) Q3 2018		Like-to-like comparison (n=114 centres) Q3 2017		vs. Q3 2018	

Q3 2018
Booking Sources

Table 5
Student weeks by booking source (ranked by total student weeks, cont.)

Rank	Source country	Commissioned weeks	Non-commissioned weeks	C	NC	C	NC
		Overall data (n=142 centres) Q3 2018		Like-to-like comparison (n=114 centres) Q3 2017		vs. Q3 2018	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Note: Percentages do not add up to 100% due to rounding.

Q3 2018
Booking Sources

Table 6
Top source countries of commissionable bookings by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks were rounded and do not add up to the total sum of commissionable student weeks.

Q3 2018
Booking Sources

Table 7
Top source countries of non-commissionable bookings by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%

Q3 2018

Booking Types

Table 8

Student weeks by source country (ranked by total student weeks) and booking type (overall data; n=142 centres)

Rank	Source country	Individual bookings	Group bookings	Rank	Source country	Individual bookings	Group bookings
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Q3 2018

Booking Types

Table 8

Student weeks by source country (ranked by total student weeks) and booking type (overall data; n=142 centres, cont.)

Rank	Source country	Individual bookings	Group bookings

Rank	Source country	Individual bookings	Group bookings

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Booking Types

Table 9

Top source countries of individual bookings by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%

Note: Percentages do not add up to 100% due to rounding.

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Booking Types

Table 10

Top source countries of group bookings by student weeks and their market share (overall data; n=142 centres)

Rank	Source country	Weeks	%
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]

Note: Percentages do not add up to 100% due to rounding.

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Programme Data

Table 11

Student weeks by source country (ranked by total student weeks) and course type (overall data; n=142 centres)

		Juniors			Adults						
Rank	Source country	General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development

Q3 2018
Programme Data

Table 11
Student weeks by source country (ranked by total student weeks) and course type (overall data; n=142 centres, cont.)

		Juniors			Adults						
Rank	Source country	General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development

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Programme Data

Table 11
Student weeks by source country (ranked by total student weeks) and course type (overall data; n=142 centres, cont.)

		Juniors			Adults						
Rank	Source country	General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development

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Programme Data

Table 11
Student weeks by source country (ranked by total student weeks) and course type (overall data; n=142 centres, cont.)

		Juniors			Adults						
Rank	Source country	General English	Summer/ Winter Camp	EAP	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development

Note: Figures of student weeks per source country were rounded and do not add up to the total sum of student weeks.

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Programme Data

Table 12

Top source countries by junior course type, student weeks and their market share (overall data; n=142 centres)

Rank	General English	Weeks	%	Summer/Winter Camp	Weeks	%	EAP	Weeks	%

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Programme Data

Table 13
Top source countries by adult course type, student weeks and their market share (overall data; n=142 centres)

Rank	General English	Weeks	%	Business & Prof. English	Weeks	%	English Plus	Weeks	%

Rank	EAP	Weeks	%	ESP	Weeks	%	One-to-One	Weeks	%	Teacher Development	Weeks	%

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks were rounded and do not add up to the total sum of student weeks by course type in Table 11.

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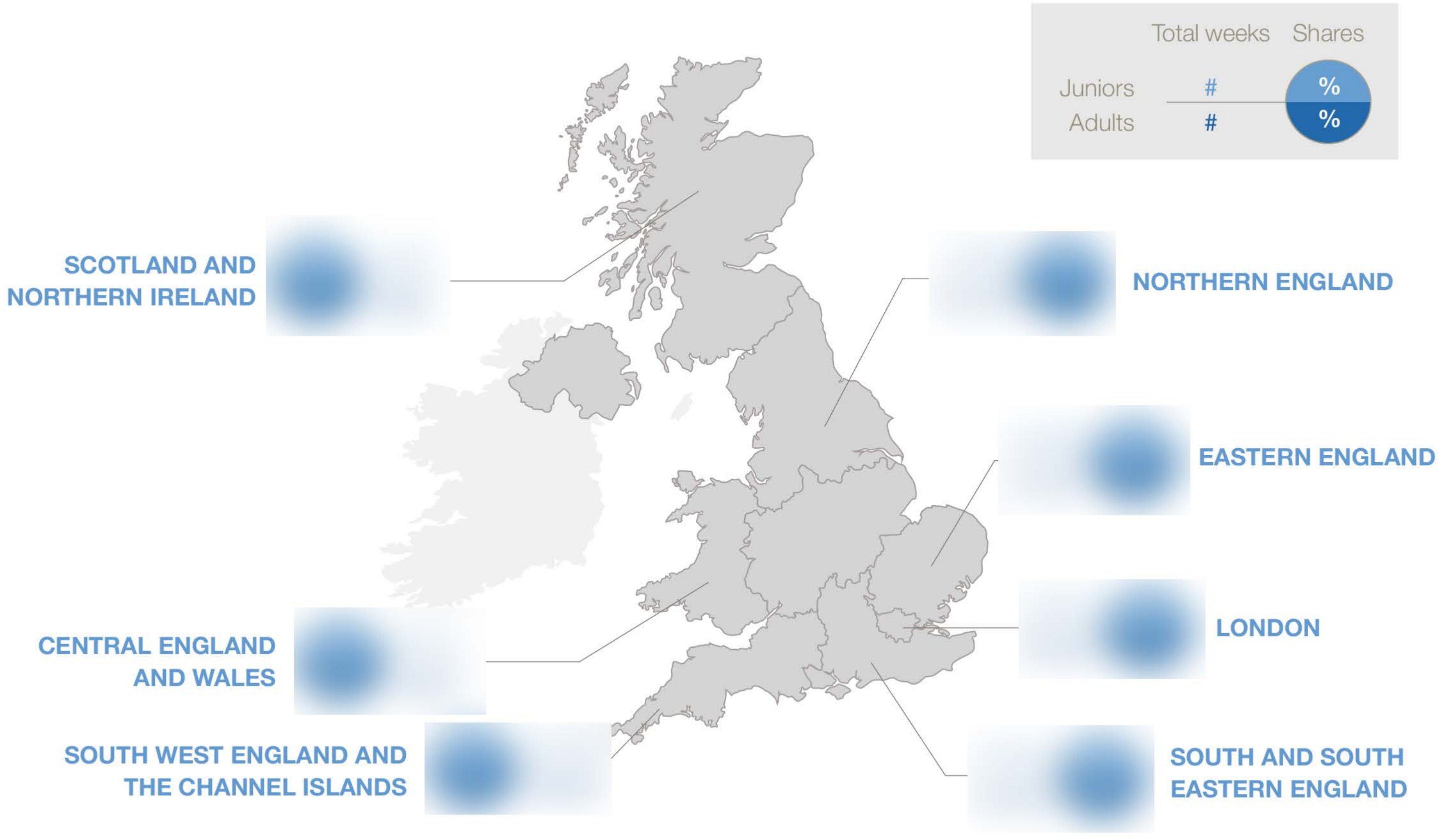
Regional Analysis

Chart 7
Junior and adult student weeks by region (overall data; n=142 centres)



Note: Figures of student weeks were rounded and do not add up to the total sum of student weeks per region in Table 1.

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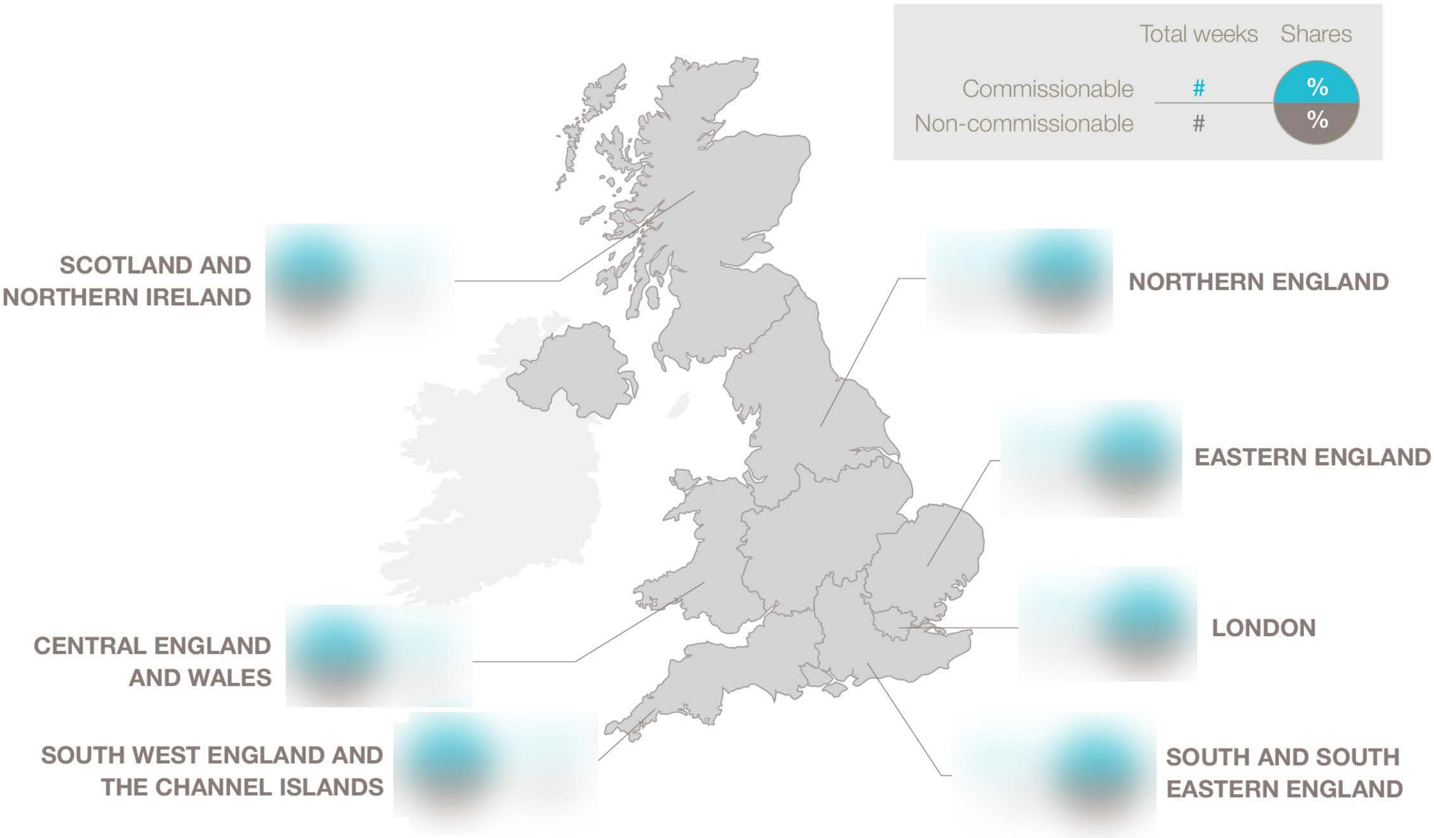
Regional Analysis

Chart 8

Commissionable and non-commissionable student weeks by region (overall data; n=142 centres)



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Regional Analysis

Table 14

Top source countries by region and their market share (student weeks) (overall data; n=142 centres)

Rank	Central England and Wales	%	Eastern England	%	London	%	Northern England	%
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Rank	Scotland and Northern Ireland	%	South and South Eastern England	%	South West England and The Channel Islands	%
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Note: Percentages do not add up to 100% due to rounding.

Q3 2018
Regional Analysis

Table 15
Student weeks by region and course type and their market share (overall data; n=142 centres)

Region	Juniors: General English	Juniors: Summer/ Winter Camp	Juniors: EAP
South and South Eastern England	[illegible]	[illegible]	[illegible]
London	[illegible]	[illegible]	[illegible]
Eastern England	[illegible]	[illegible]	[illegible]
Northern England	[illegible]	[illegible]	[illegible]
South West England and The Channel Islands	[illegible]	[illegible]	[illegible]
Central England and Wales	[illegible]	[illegible]	[illegible]
Scotland and Northern Ireland	[illegible]	[illegible]	[illegible]

Region	Adults: General English	Adults: Business & Prof. English	Adults: English Plus	Adults: EAP	Adults: ESP	Adults: One-to-One	Adults: Teacher Development
South and South Eastern England	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
London	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Eastern England	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Northern England	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
South West England and The Channel Islands	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Central England and Wales	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Scotland and Northern Ireland	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks were rounded and do not add up to the total sum of student weeks per region in Table 1 and the total sum of student weeks by course type in Table 11.

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QUIC participants

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