QUIC

QUARTERLY
INTELLIGENCE
COHORT

Market Report

Q4 2017

Executive Summary

ENGLISH UK

englishuk.com/quic

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Q4 2017
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 executive summary of the fourth report from our new optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), which introduces features not available in our existing 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. They include student weeks by source country, age group, booking source and programme type, and regional comparative analysis. Membership is on a rolling annual basis, and all English UK centres can join the 2018 cohort up until mid-March 2018. The executive summary is made publicly available.

With 124 members*, QUIC's 2017 cohort is the largest sample in English UK's history of quarterly reporting. 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.

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 Q4 report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

For the second time since the launch of QUIC, historical comparative analysis (page 17) is provided. This feature will continue and be further enhanced for future reports.

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.

* The cohort in Q4 2017 was 122 members. Of the 124 centres initially participating in QUIC in 2017, two have closed down.

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Table 1
QUIC region summary

Region	**No. of** returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	29	23.8%	25,242	17.8%
London	23	18.9%	42,441	29.9%
Northern England	20	16.4%	30,100	21.2%
South West England and The Channel Islands	15	12.3%	19,037	13.4%
Eastern England	11	9.0%	14,885	10.5%
Scotland	6	4.9%	5,783	4.1%
Central England and Wales	6	4.9%	4,311	3.0%
Multi-centres	12	9.8%	239	0.2%
Total	**122**	**100%**	**142,038**	**100.0%**

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

Note: There are no English UK member centres from Northern Ireland currently participating in QUIC. Furthermore, Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment.

Note: In Q1 2017 multi-centres were categorised by the location of their headquarters. To improve accuracy, multi-centres are now categorised separately.

Q4 2017
Overview

The 122 English UK member centres which reported QUIC data in Q4 2017 registered a total of 142,038 student weeks (Note: two centres closed down in Q4 2017).

The ratio of adult to junior student weeks at the centres declaring data for Q4 2017 averaged out at 95% to 5% (134,500 adult student weeks to 7,538 junior student weeks).

Chart 1
Student weeks by age group

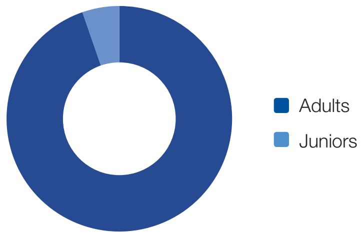
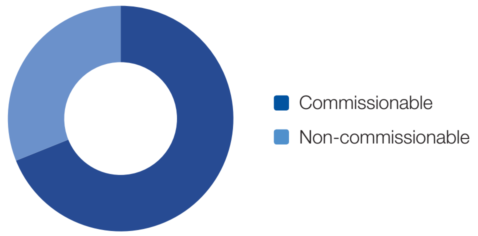
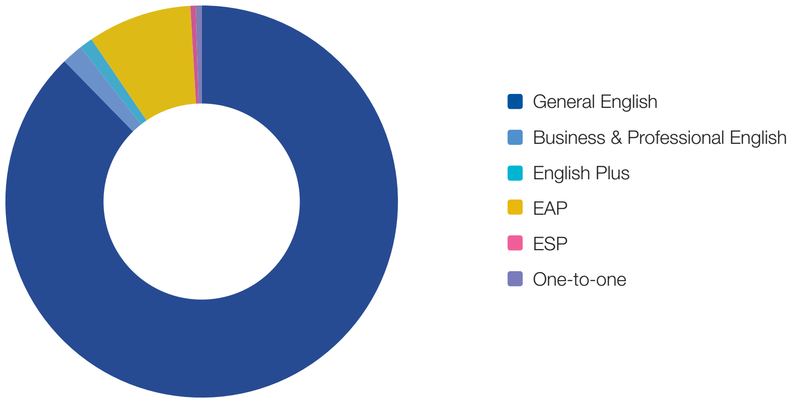


Chart 2
Student weeks by booking source



Of all student weeks, 69% (97,880) were booked through a commissionable source (e.g. via a study abroad partner agency).

Chart 3
Student weeks by course type



Similarly to the first three quarters, the distribution of student weeks by programme type in Q4 was dominated by General English courses, which accounted for 87.7% weeks. The proportion of the second most popular course type, English for Academic Purposes, was 8.6%. With a share of 1.7%, Business and Professional English constituted the third largest course type in Q4 2017.

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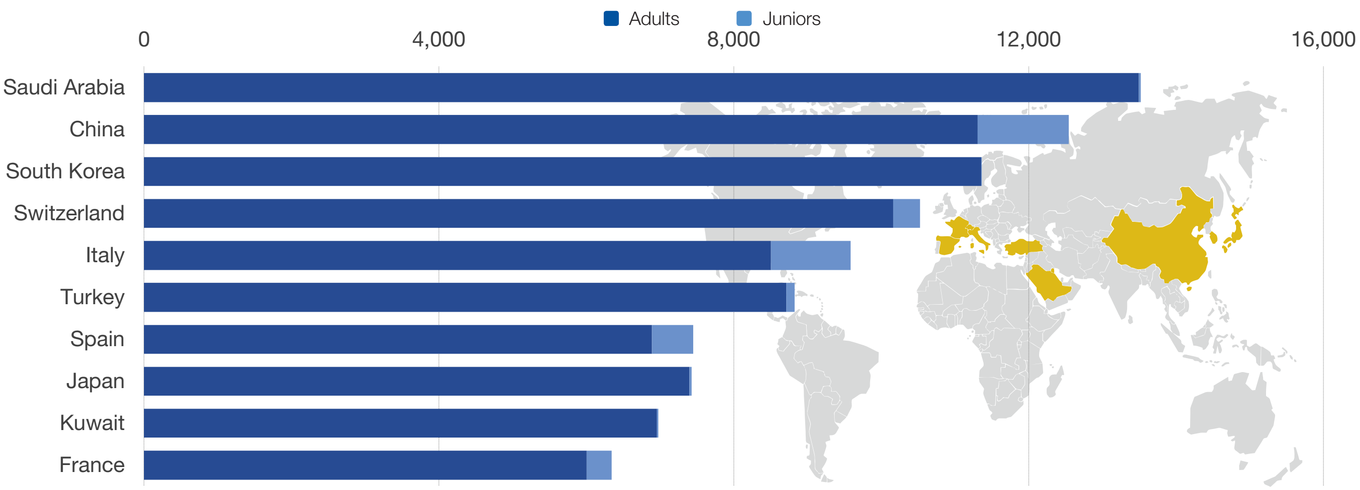
Overview

Chart 4
Student weeks by age group and source country (top 10 markets)



Saudi Arabia was the top source market of adult and total student weeks in Q4 (13,521), closely followed by China (12,545). Switzerland posted a positive development and represented the largest feeder in Europe (10,525 weeks).

From the perspective of junior student weeks, China established itself as the biggest sender in Q4 with 1,240 student weeks. Other non-European markets with notable junior student weeks in Q4 were Thailand (249) and Colombia (234).

Table 2
Student weeks in Q4 2016 and Q4 2017 by age group

Period	Total weeks	Junior weeks	Adult weeks
	Σ		
Q4 2016	103,616	5,001	98,615
Q4 2017	104,915	4,829	100,086
Change	+1.3%	-3.4%	+1.5%

Note: Historical comparison results are based on a sample of centres reporting quarterly in both 2016 and 2017 (n=79). The data is therefore indicative.

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