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Market Report

Q1 2017

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Executive Summary

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Prepared on behalf of:



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## Q1 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 first 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. 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. All English UK members will get an opportunity to join the 2018 cohort in December 2017.

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 Q1 report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

This is the first step in the development of QUIC. Over time, further add-ons such as historical comparative and sub-sector analysis will be provided to develop English UK's vision of supporting members to success with timely, sophisticated market insights.

For more information on QUIC, please email [statistics@englishuk.com](mailto: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.

# Q1 2017

## Introduction

**Table 1**

QUIC region summary (multi-centres have been classed by the location of their headquarters)

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
 South and South Eastern England	35	28.2%	30,847	20.5%
 London	25	20.2%	46,490	30.9%
 Northern England	20	16.1%	25,397	16.9%
 Eastern England	16	12.9%	17,001	11.3%
 South West England and The Channel Islands	15	12.1%	21,003	13.9%
 Scotland	7	5.6%	6,265	4.2%
 Central England and Wales	6	4.8%	3,645	2.4%
<b>Total</b>	<b>124</b>	<b>100%</b>	<b>150,648</b>	<b>100%</b>

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.

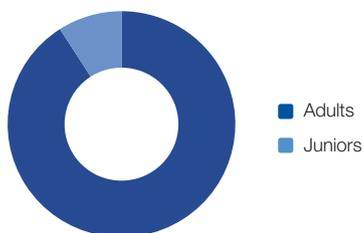
# Q1 2017 Overview

In Q1 2017, the 124 English UK member centres who report QUIC data registered a total of 150,648 student weeks (Note: 12 centres represented summer schools who therefore detailed no student weeks for Q1).

The ratio between adult and junior students weeks at the centres declaring data for Q1 2017 averaged out to 91% : 9% (136,958 adult student weeks, 13,690 junior student weeks). Three quarters of all student weeks (112,116) were booked through a commissionable source (e.g. via a study abroad partner agency).

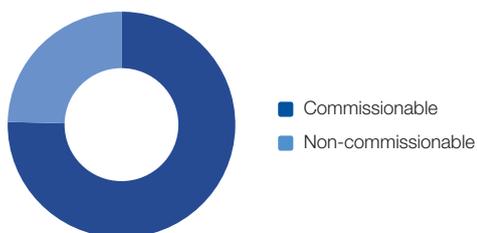
**Chart 1**

Student weeks by age group



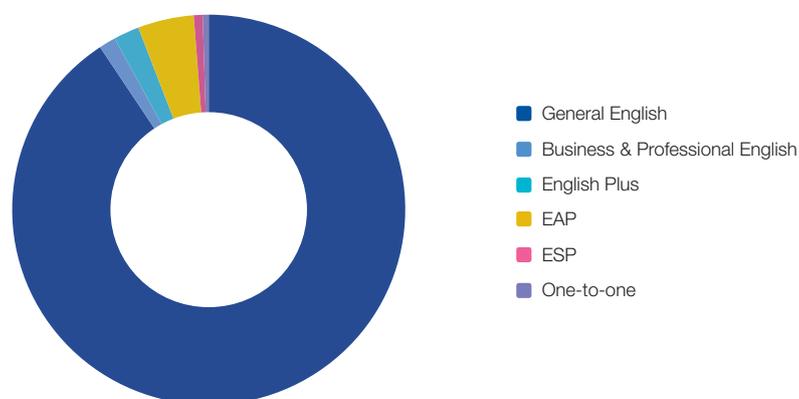
**Chart 2**

Student weeks by booking source



**Chart 3**

Student weeks by course type

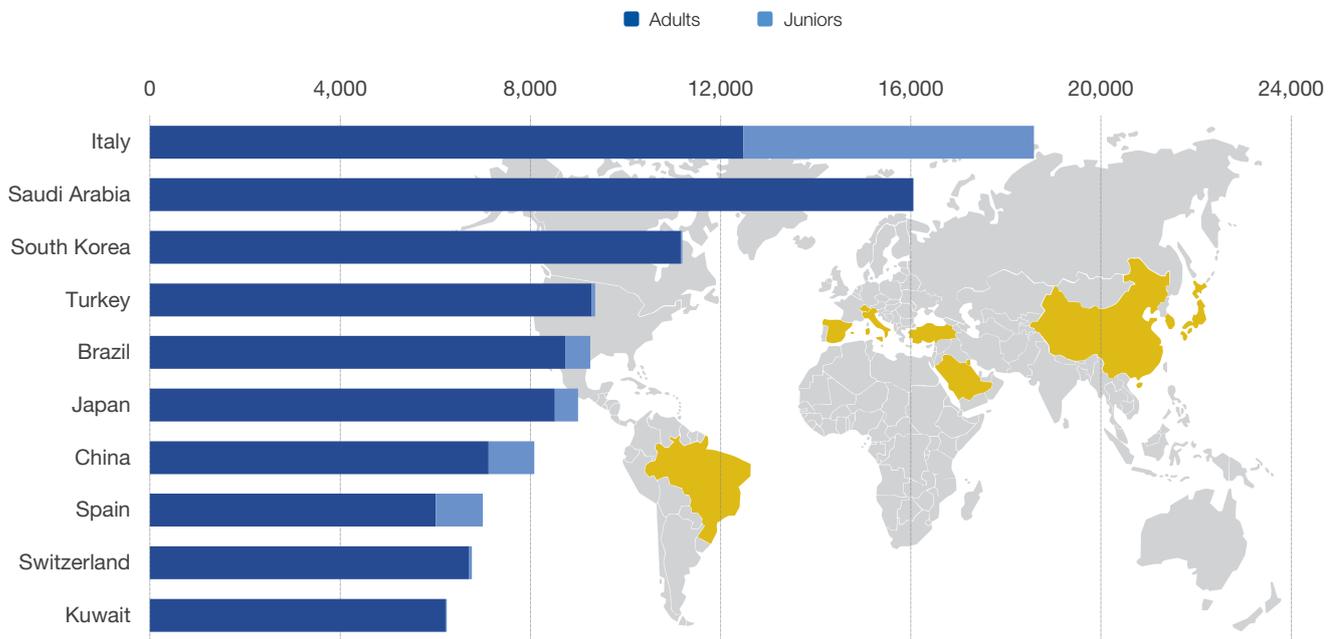


As for programme preferences, 91% of all course weeks were spent studying General English. English for Academic Purposes (EAP) programmes accounted for 4.6%, while English Plus courses amounted to 2.1% of all student weeks. The market share of Business and Professional English stood at 1.4%.

# Q1 2017 Overview

## Chart 4

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



The leading source markets in Q1 2017 were Italy (18,588 weeks) and Saudi Arabia (16,056); with the former also accounting for the largest junior group (44.6% of all junior student weeks were from Italy). Spain, the 3<sup>rd</sup> largest market in 2016 according to the English UK student statistics report, occupied the 8<sup>th</sup> spot with a share of 5%.

# **QUIC** QUARTERLY INTELLIGENCE COHORT