
Market Report

Q3 2017

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Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information. This report is the third 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. An executive summary will be 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 quarter three (Q3) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

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

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.

Table 1

QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
South and South Eastern England	85	68.6%	85,710	68.6%
London	1	0.8%	1,000	0.8%
Northern England	28	22.6%	28,000	22.6%
South West England and The Channel Islands	11	8.9%	11,000	8.9%
Eastern England	10	8.1%	10,000	8.1%
Scotland	1	0.8%	1,000	0.8%
Central England and Wales	10	8.1%	11,000	8.9%
Multi-centres	1	0.8%	1,000	0.8%
Total	124	100%	124,710	100%

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.

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Overview

QUIC is a quarterly intelligence cohort that provides a comprehensive overview of the current state of the industry. It is a valuable resource for anyone looking to stay up-to-date on the latest trends and developments in the field.

The cohort is composed of a diverse group of experts and practitioners from various backgrounds and organizations. This ensures that the information provided is both accurate and relevant to the needs of the industry.

QUIC 101

QUIC 101 is a comprehensive overview of the cohort and its mission. It is a must-read for anyone new to the cohort.



QUIC 102

QUIC 102 is a comprehensive overview of the cohort's mission and its impact on the industry. It is a must-read for anyone looking to understand the cohort's role.



QUIC 103 is a comprehensive overview of the cohort's mission and its impact on the industry. It is a must-read for anyone looking to understand the cohort's role.

QUIC 104

QUIC 104 is a comprehensive overview of the cohort's mission and its impact on the industry. It is a must-read for anyone looking to understand the cohort's role.



QUIC 105 is a comprehensive overview of the cohort's mission and its impact on the industry. It is a must-read for anyone looking to understand the cohort's role.

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Overview

Chart 4

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



This chart shows the number of student weeks by age group and source country for the top 20 markets. The data is presented in two columns: 2016 and 2017. The x-axis represents the number of student weeks, ranging from 0 to 70,000. The y-axis lists the source countries. The chart shows a general increase in student weeks for most countries in 2017 compared to 2016.

The chart also shows the number of student weeks by age group for the top 20 markets. The data is presented in two columns: 2016 and 2017. The x-axis represents the number of student weeks, ranging from 0 to 70,000. The y-axis lists the source countries. The chart shows a general increase in student weeks for most countries in 2017 compared to 2016.

The chart also shows the number of student weeks by age group for the top 20 markets. The data is presented in two columns: 2016 and 2017. The x-axis represents the number of student weeks, ranging from 0 to 70,000. The y-axis lists the source countries. The chart shows a general increase in student weeks for most countries in 2017 compared to 2016.



The chart also shows the number of student weeks by age group for the top 20 markets. The data is presented in two columns: 2016 and 2017. The x-axis represents the number of student weeks, ranging from 0 to 70,000. The y-axis lists the source countries. The chart shows a general increase in student weeks for most countries in 2017 compared to 2016.

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Overall Data

Table 2

Student weeks by source country (ranked by total student weeks), age group and booking source



Rank	Source country	Total		Junior		Adult		Commissioned	Non-commissioned
		weeks	%	weeks	%	weeks	%	weeks	weeks
		Σ							
1	USA	124,485	17.1%	62,243	17.1%	62,243	17.1%		
2	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
3	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
4	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
5	USA	124,485	17.1%	62,243	17.1%	62,243	17.1%		
6	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
7	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
8	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
9	USA	124,485	17.1%	62,243	17.1%	62,243	17.1%		
10	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
11	USA	124,485	17.1%	62,243	17.1%	62,243	17.1%		
12	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
13	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
14	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
15	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
16	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
17	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
18	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
19	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
20	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
21	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
22	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
23	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
24	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		
25	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
26	USA (Continental)	124,485	17.1%	62,243	17.1%	62,243	17.1%		
27	UK	124,485	17.1%	62,243	17.1%	62,243	17.1%		

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Overall Data

Table 2

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



Rank	Source country	Total weeks	%	Junior weeks	%	Adult weeks	%	Commissioned weeks	Non-commissioned weeks
		Σ							
28									
29									
30									
31									
32									
33									
34									
35									
36									
37									
38									
39									
40									
41									
42									
43									
44									
45									
46									
47									
48									
49									
50									
51									
52									
53									
54									

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Overall Data

Table 2

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



Rank	Source country	Total		Junior		Adult		Commissioned	Non-commissioned
		weeks	%	weeks	%	weeks	%	weeks	weeks
		Σ							
55	USA	100	1.12	100	1.12	100	1.12		
56	USA	100	1.12	100	1.12	100	1.12		
57	USA	100	1.12	100	1.12	100	1.12		
58	USA	100	1.12	100	1.12	100	1.12		
59	USA	100	1.12	100	1.12	100	1.12		
60	USA	100	1.12	100	1.12	100	1.12		
61	USA	100	1.12	100	1.12	100	1.12		
62	USA	100	1.12	100	1.12	100	1.12		
63	USA	100	1.12	100	1.12	100	1.12		
	USA	100	1.12	100	1.12	100	1.12		
65	USA	100	1.12	100	1.12	100	1.12		
66	USA	100	1.12	100	1.12	100	1.12		
67	USA	100	1.12	100	1.12	100	1.12		
	USA	100	1.12	100	1.12	100	1.12		
69	USA	100	1.12	100	1.12	100	1.12		
70	USA	100	1.12	100	1.12	100	1.12		
71	USA	100	1.12	100	1.12	100	1.12		
72	USA	100	1.12	100	1.12	100	1.12		
73	USA	100	1.12	100	1.12	100	1.12		
74	USA	100	1.12	100	1.12	100	1.12		
75	USA	100	1.12	100	1.12	100	1.12		
76	USA	100	1.12	100	1.12	100	1.12		
77	USA	100	1.12	100	1.12	100	1.12		
78	USA	100	1.12	100	1.12	100	1.12		
79	USA	100	1.12	100	1.12	100	1.12		
80	USA	100	1.12	100	1.12	100	1.12		
81	USA	100	1.12	100	1.12	100	1.12		

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Overall Data

Table 2

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

Rank	Source country	Total weeks	%	Junior weeks	%	Adult weeks	%	Commissioned weeks	Non-commissioned weeks
		Σ							
82									
83									
84									
85									
86									
87									
88									
89									
90									
91									
92									
94									
95									
96									
97									
98									
99									
100									
101									
102									
103									
104									
105									
106									
107									
Total									


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

Note: The UK was removed from the list of source countries in Q3 due to inconsistencies in reporting of the UK student weeks by the centres.

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Overall Data

Table 3
Top source countries of junior students by student weeks and their market share

Rank	Source country	Weeks	%
			
1	USA	12,450	21.2%
2	France	10,800	18.8%
3	Spain	8,900	15.5%
4	Germany	7,100	12.4%
5	Italy	6,500	11.3%
6	UK	5,800	10.1%
7	Japan	4,700	8.2%
8	Canada	4,200	7.3%
9	Sweden	3,900	6.7%
10	China	3,600	6.2%
11	Belgium	3,100	5.3%
12	Poland	2,800	4.8%
13	Switzerland	2,500	4.3%
14	Australia	2,300	4.0%
15	India	2,100	3.7%
16	South Korea	1,900	3.3%
17	U.S.A. (DC)	1,800	3.1%
18	Denmark	1,600	2.8%
19	Finland	1,500	2.6%
20	Portugal	1,400	2.4%
	Other	12,100	21.4%

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Overall Data

Table 4








Top source countries of adult students by student weeks and their market share

Rank	Source country	Weeks	%
			
1	USA	12,100	25.1%
2	UK	10,100	20.9%
3	France	10,100	20.9%
4	Germany	10,100	20.9%
5	Italy	10,100	20.9%
6	Spain	10,100	20.9%
7	Canada	10,100	20.9%
8	Japan	10,100	20.9%
9	China	10,100	20.9%
10	India	10,100	20.9%
11	South Korea	10,100	20.9%
12	Australia	10,100	20.9%
13	Sweden	10,100	20.9%
14	Norway	10,100	20.9%
15	Denmark	10,100	20.9%
16	Finland	10,100	20.9%
17	Poland	10,100	20.9%
18	Czech Republic	10,100	20.9%
19	Slovakia	10,100	20.9%
20	Hungary	10,100	20.9%

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Programme Data

Table 5
Student weeks by source country (ranked by total student weeks) and course type








		Juniors	Adults					
Rank	Source country	General English	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One
								
1	USA	125,100	125,100	100	100	100	100	100
2	UK	124,900	124,900	100	100	124,900	100	100
3	Canada	124,800	124,800	100	100	124,800	100	100
4	France	124,700	124,700	100	100	124,700	100	100
5	Germany	124,600	124,600	100	100	124,600	100	100
6	Spain	124,500	124,500	100	100	124,500	100	100
7	Italy	124,400	124,400	100	100	124,400	100	100
8	Japan	124,300	124,300	100	100	124,300	100	100
9	China	124,200	124,200	100	100	124,200	100	100
10	India	124,100	124,100	100	100	124,100	100	100
11	South Korea	124,000	124,000	100	100	124,000	100	100
12	Brazil	123,900	123,900	100	100	123,900	100	100
13	Sweden	123,800	123,800	100	100	123,800	100	100
14	Poland	123,700	123,700	100	100	123,700	100	100
15	Belgium	123,600	123,600	100	100	123,600	100	100
16	Switzerland	123,500	123,500	100	100	123,500	100	100
17	Australia	123,400	123,400	100	100	123,400	100	100
18	Canada	123,300	123,300	100	100	123,300	100	100
19	USA	123,200	123,200	100	100	123,200	100	100
20	UK	123,100	123,100	100	100	123,100	100	100
21	France	123,000	123,000	100	100	123,000	100	100
22	Germany	122,900	122,900	100	100	122,900	100	100
23	Spain	122,800	122,800	100	100	122,800	100	100
24	Italy	122,700	122,700	100	100	122,700	100	100
25	Japan	122,600	122,600	100	100	122,600	100	100
26	China	122,500	122,500	100	100	122,500	100	100
27	India	122,400	122,400	100	100	122,400	100	100

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Programme Data

Table 5

Student weeks by source country (ranked by total student weeks) and course type (cont.)








		Juniors	Adults					
Rank	Source country	General English	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One
								
28	France	100	100	100	100	100	100	100
29	France	100	100	100	100	100	100	100
30	France	100	100	100	100	100	100	100
31	France	100	100	100	100	100	100	100
32	France	100	100	100	100	100	100	100
33	France	100	100	100	100	100	100	100
34	France	100	100	100	100	100	100	100
35	France	100	100	100	100	100	100	100
36	France	100	100	100	100	100	100	100
37	France	100	100	100	100	100	100	100
38	France	100	100	100	100	100	100	100
39	France	100	100	100	100	100	100	100
40	France	100	100	100	100	100	100	100
41	France	100	100	100	100	100	100	100
42	France	100	100	100	100	100	100	100
43	France	100	100	100	100	100	100	100
44	France	100	100	100	100	100	100	100
45	France	100	100	100	100	100	100	100
46	France	100	100	100	100	100	100	100
47	France	100	100	100	100	100	100	100
48	France	100	100	100	100	100	100	100
49	France	100	100	100	100	100	100	100
50	France	100	100	100	100	100	100	100
51	France	100	100	100	100	100	100	100
52	France	100	100	100	100	100	100	100
53	France	100	100	100	100	100	100	100
54	France	100	100	100	100	100	100	100

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Programme Data

Table 5

Student weeks by source country (ranked by total student weeks) and course type (cont.)








Rank	Source country	Juniors	Adults					
		General English	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One
								
55	USA	100	100	100	100	100	100	100
56	USA	100	100	100	100	100	100	100
57	USA	100	100	100	100	100	100	100
58	USA	100	100	100	100	100	100	100
59	USA	100	100	100	100	100	100	100
60	USA	100	100	100	100	100	100	100
61	USA	100	100	100	100	100	100	100
62	USA	100	100	100	100	100	100	100
63	USA	100	100	100	100	100	100	100
64	USA	100	100	100	100	100	100	100
65	USA	100	100	100	100	100	100	100
66	USA	100	100	100	100	100	100	100
67	USA	100	100	100	100	100	100	100
68	USA	100	100	100	100	100	100	100
69	USA	100	100	100	100	100	100	100
70	USA	100	100	100	100	100	100	100
71	USA	100	100	100	100	100	100	100
72	USA	100	100	100	100	100	100	100
73	USA	100	100	100	100	100	100	100
74	USA	100	100	100	100	100	100	100
75	USA	100	100	100	100	100	100	100
76	USA	100	100	100	100	100	100	100
77	USA	100	100	100	100	100	100	100
78	USA	100	100	100	100	100	100	100
79	USA	100	100	100	100	100	100	100
80	USA	100	100	100	100	100	100	100
81	USA	100	100	100	100	100	100	100

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Programme Data

Table 5

Student weeks by source country (ranked by total student weeks) and course type (cont.)

		Juniors	Adults					
Rank	Source country	General English	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One
								
82	Spain - Madrid (Spain)	100	100	100	100	100	100	100
83	Germany	100	100	100	100	100	100	100
84	France	100	100	100	100	100	100	100
85	Poland	100	100	100	100	100	100	100
86	Italy	100	100	100	100	100	100	100
87	Spain	100	100	100	100	100	100	100
88	Spain - Madrid (Spain)	100	100	100	100	100	100	100
89	Germany	100	100	100	100	100	100	100
90	France	100	100	100	100	100	100	100
91	Poland	100	100	100	100	100	100	100
92	Italy	100	100	100	100	100	100	100
	Germany	100	100	100	100	100	100	100
94	France	100	100	100	100	100	100	100
95	Poland	100	100	100	100	100	100	100
96	Spain - Madrid (Spain)	100	100	100	100	100	100	100
97	Germany	100	100	100	100	100	100	100
98	France	100	100	100	100	100	100	100
99	Poland	100	100	100	100	100	100	100
100	Italy	100	100	100	100	100	100	100
101	Germany	100	100	100	100	100	100	100
102	France	100	100	100	100	100	100	100
103	Poland	100	100	100	100	100	100	100
104	Italy	100	100	100	100	100	100	100
105	Spain - Madrid (Spain)	100	100	100	100	100	100	100
106	Germany	100	100	100	100	100	100	100
107	France	100	100	100	100	100	100	100
Total		1000000	1000000	1000000	1000000	1000000	1000000	1000000

Note: Due to discrepancies in reporting by the centres, total figures of student weeks by age (Table 2) and programme type (Table 5) do not match for each of the source countries. The difference between the total sum of student weeks equals 0.03%.




Note: The UK was removed from the list of source countries in Q3 due to inconsistencies in reporting of the UK student weeks by the centres.




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Programme Data

Table 6

Top source countries by adult course type, student weeks and their market share

Rank	General English	Weeks	%	Business & Prof. English	Weeks	%	English Plus	Weeks	%
									
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

Rank	EAP	Weeks	%	ESP	Weeks	%	One-to-one	Weeks	%
									
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									

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

Note: Member centres were requested to record all courses for juniors as 'General English'. For top source countries of junior students, please refer to Table 3 on page 10.

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Historical Comparison

Table 7

Student weeks in Q3 2016 and Q3 2017 by age group and booking source










Period	Total weeks	Junior weeks	%	Adult weeks	%	Commissioned weeks	Non-commissioned weeks
	Σ						
Q3 2016	151,185	51,185	34%	100,000	66%	100,000	51,185
Q3 2017	151,185	51,185	34%	100,000	66%	100,000	51,185
Change	0	0	0%	0	0%	0	0

Table 8

Student weeks in Q3 2016 and Q3 2017 by course type

	Juniors	Adults					
Period	General English	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One
							
Q3 2016	151,185	151,185	151,185	151,185	151,185	151,185	151,185
Q3 2017	151,185	151,185	151,185	151,185	151,185	151,185	151,185
Change	0	0	0	0	0	0	0

Note: Historical comparison results are based on a sample of centres reporting quarterly in both 2016 and 2017 (n=70). The data is therefore indicative.

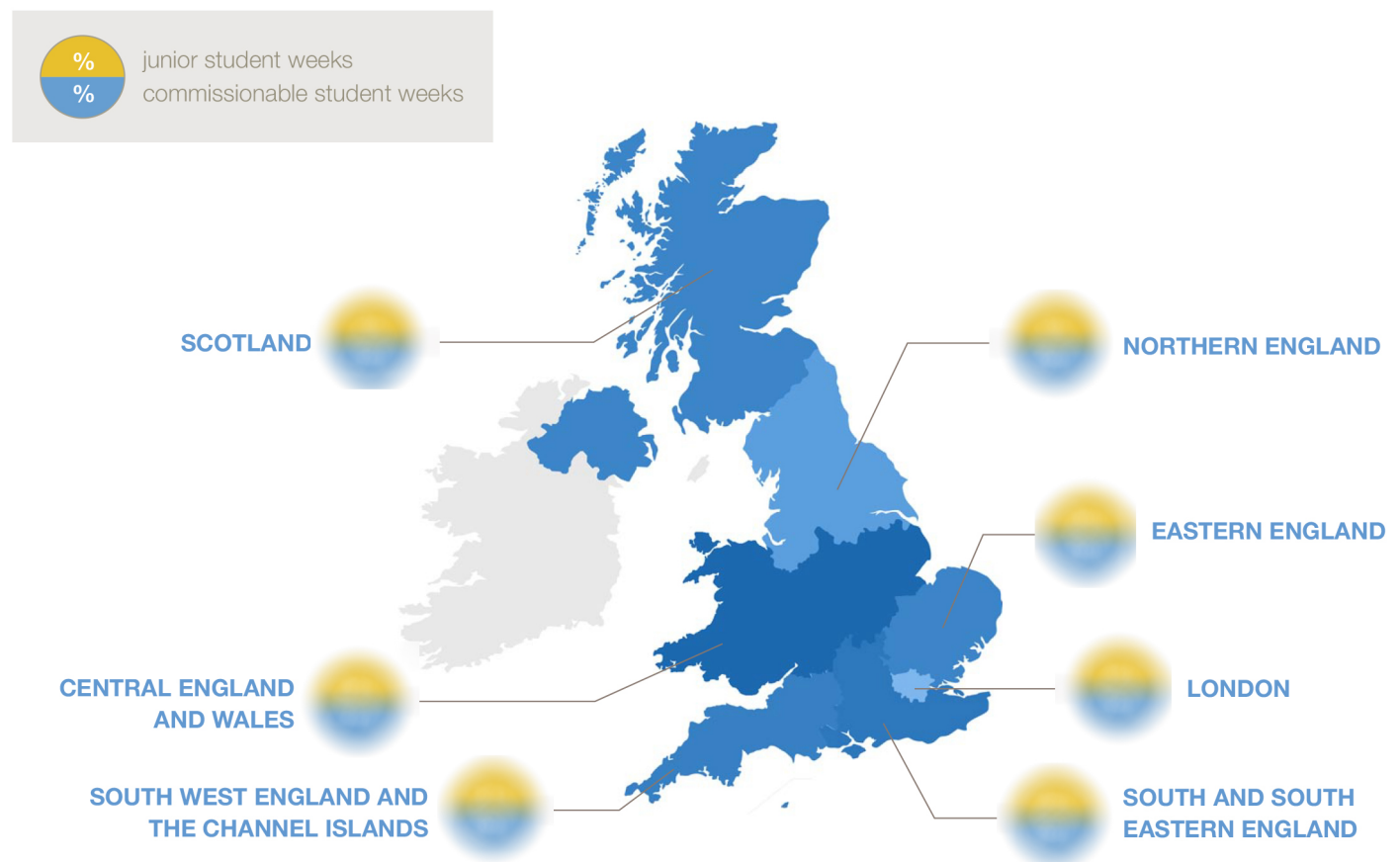
Note: Due to discrepancies in reporting by the centres, total figures of student weeks by age (Table 7) and programme type (Table 8) do not match for each of the years. The differences between the sum of student weeks equals 0.09% (Q3 2016) and 0.05% (Q3 2017).

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Regional Analysis

Chart 5

Percentage of junior student weeks and commissionable student weeks by region



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Regional Analysis

Table 9

Top source countries by region and their market share

Rank	Central England and Wales		Eastern England		London		Northern England	
		%		%		%		%
1	USA	17.1%	USA	12.1%	USA	12.1%	USA	12.1%
2	Germany	12.1%	Germany	12.1%	Germany	12.1%	Germany	12.1%
3	France	12.1%	France	12.1%	France	12.1%	France	12.1%
4	Spain	12.1%	Spain	12.1%	Spain	12.1%	Spain	12.1%
5	Italy	12.1%	Italy	12.1%	Italy	12.1%	Italy	12.1%
6	Sweden	12.1%	Sweden	12.1%	Sweden	12.1%	Sweden	12.1%
7	Poland	12.1%	Poland	12.1%	Poland	12.1%	Poland	12.1%
8	Belgium	12.1%	Belgium	12.1%	Belgium	12.1%	Belgium	12.1%
9	USA	12.1%	USA	12.1%	USA	12.1%	USA	12.1%
10	Germany	12.1%	Germany	12.1%	Germany	12.1%	Germany	12.1%

Rank	Scotland		South and South Eastern England		South West England and The Channel Islands	
		%		%		%
1	USA	12.1%	USA	12.1%	USA	12.1%
2	Germany	12.1%	Germany	12.1%	Germany	12.1%
3	Germany	12.1%	Germany	12.1%	Germany	12.1%
4	France	12.1%	France	12.1%	France	12.1%
5	France	12.1%	France	12.1%	France	12.1%
6	Germany	12.1%	Germany	12.1%	Germany	12.1%
7	France	12.1%	France	12.1%	France	12.1%
8	Germany	12.1%	Germany	12.1%	Germany	12.1%
9	France	12.1%	France	12.1%	France	12.1%
10	Germany	12.1%	Germany	12.1%	Germany	12.1%

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

Q3 2017

QUIC participants

QUIC QUARTERLY INTELLIGENCE COHORT