QUIC

**QUARTERLY
INTELLIGENCE
COHORT**

Market Report

Q3 2017

ENGLISH**UK**

englishuk.com/quic

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Prepared on behalf of:

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Q3 2017
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				
London				
Northern England				
South West England and The Channel Islands				
Eastern England				
Scotland				
Central England and Wales				
Multi-centres				
Total				

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.

Q3 2017
Overview

Q3 2017
Overview

Chart 4
Student weeks by age group and source country (top 20 markets)

Q3 2017
Overall Data

Table 2

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

Rank	Source country	Total weeks	%	Junior weeks	%	Adult weeks	%	Commissioned weeks	Non-commissioned weeks
		Σ		🛡		🏃			
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									

Q3 2017
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									

Q3 2017
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							
55									
56									
57									
58									
59									
60									
61									
62									
63									
65									
66									
67									
69									
70									
71									
72									
73									
74									
75									
76									
77									
78									
79									
80									
81									

Q3 2017
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.

Q3 2017
Overall Data

Table 3

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

Rank	Source country	Weeks	%
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

Q3 2017
Overall Data

Table 4

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

Rank	Source country	Weeks	%
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

Q3 2017
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								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								

Q3 2017
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
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								

Q3 2017
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
55								
56								
57								
58								
59								
60								
61								
62								
63								
65								
66								
67								
69								
70								
71								
72								
73								
74								
75								
76								
77								
78								
79								
80								
81								

Q3 2017
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								
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: 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.

Q3 2017
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.

Q3 2017
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							
Q3 2017							
Change							

Table 8

Student weeks in Q3 2016 and Q3 2017 by course type

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

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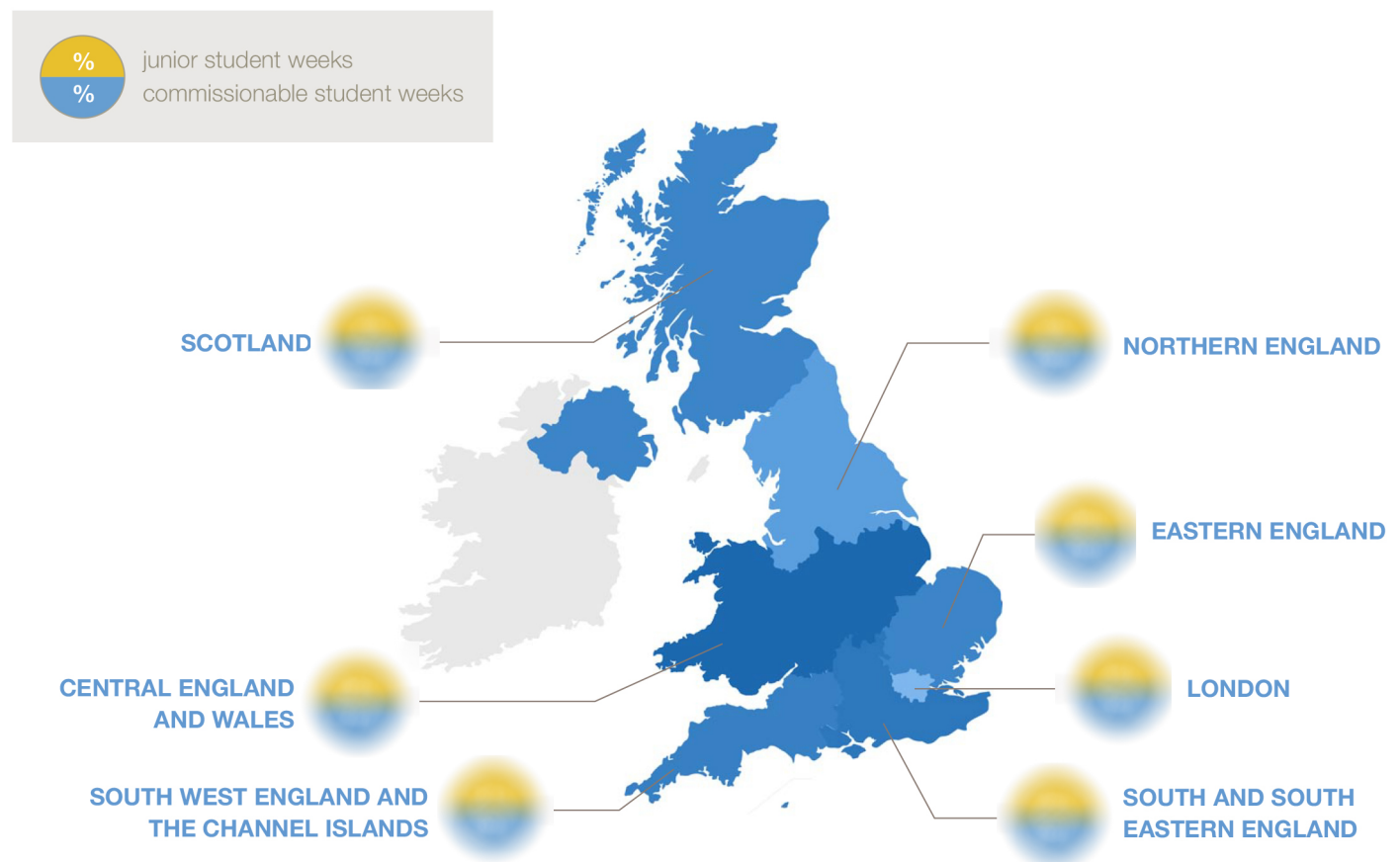
Note: Due to discrepancies in reporting by the centres, total figures of student weeks by age (Table 7) and programme type (Table 8) do not match for each of the years. The differences between the sum of student weeks equals 0.09% (Q3 2016) and 0.05% (Q3 2017).

Q3 2017
Regional Analysis

Chart 5

Percentage of junior student weeks and commissionable student weeks by region

% junior student weeks
% commissionable student weeks

SCOTLAND

NORTHERN ENGLAND

EASTERN ENGLAND

CENTRAL ENGLAND
AND WALES

LONDON

SOUTH WEST ENGLAND AND
THE CHANNEL ISLANDS

SOUTH AND SOUTH
EASTERN ENGLAND

Q3 2017
Regional Analysis

Table 9
Top source countries by region and their market share

Rank	Central England and Wales	%	Eastern England	%	London	%	Northern England	%
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								

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

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

Q3 2017
QUIC participants

QUIC

QUARTERLY INTELLIGENCE COHORT