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Market Report

Q4 2018

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Executive Summary

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Prepared on behalf of:



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## Q4 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 executive summary of the quarter four (Q4) 2018 report from 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 four 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. However, the Q4 2018 cohort numbered only 136 members, as, of the 144 centres initially participating in 2018, one had closed

down, two had withdrawn from the scheme and five were unable to submit their data this quarter due to technical difficulties. 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 sectorial analysis or deeper regional insight, may be possible in future if the cohort becomes more representative, or if additional member data is sought.

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.

# Q4 2018 Overview

**Table 1**  
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
	📄	%	Σ	%
 London	27	22.3%	43,488	29.7%
 Northern England	26	21.5%	35,910	24.5%
 South and South Eastern England	26	21.5%	25,635	17.5%
 South West England and The Channel Islands	19	15.7%	19,064	13.0%
 Eastern England	12	9.9%	14,221	9.7%
 Central England and Wales	6	5.0%	3,904	2.7%
 Scotland and Northern Ireland	5	4.1%	4,246	2.9%
<b>Total</b>	<b>121</b>	<b>100.0%</b>	<b>146,468</b>	<b>100.0%</b>

**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 Q4 2018 is 136. The number of returns differs per quarter and depends on when teaching premise locations are operational.

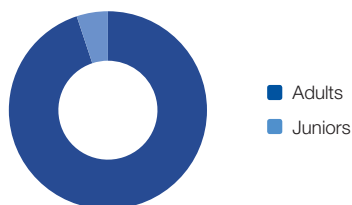
# Q4 2018 Overview

The 136 English UK member centres which reported QUIC data in Q4 2018 registered a total of 146,468 student weeks. Altogether, they represented 234 teaching centre locations, of which 121 were operational in the fourth quarter of 2018.

The ratio of adult to junior student weeks in Q4 2018 averaged out at 95% to 5% (138,995 adult student weeks to 7,473 junior student weeks).

## Chart 1

Student weeks by age group



Overall, 109 centres that reported data in both Q4 2017 and Q4 2018 faced a decline of 2.8%. The drop was caused by fewer adult student weeks. On the other hand, juniors were up by almost 14%.

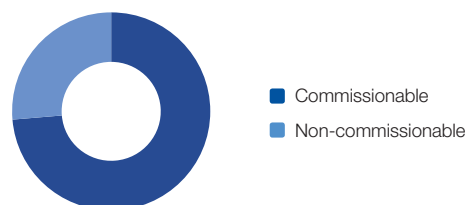
Period	Total weeks	Junior weeks	%	Adult weeks	%
<b>Q4 2017</b>	131,925	5,185	4%	126,740	96%
<b>Q4 2018</b>	128,257	5,908	5%	122,349	95%
<b>Change</b>	-2.8%	+13.9%		-3.5%	

n=109 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).

## Chart 2

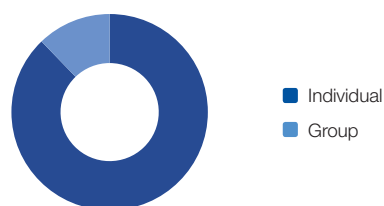
Student weeks by booking source



The last quarter of the year traditionally exhibits a lower proportion of commissioned weeks than any other quarter. Nonetheless, Q4 2018 saw an increase in the share of commissioned weeks in comparison to Q4 2017.

## Chart 3

Student weeks by booking type



In terms of booking type, as many as 88% of student weeks were attributed to individual students (in Q3 2018, the share stood at 66%).

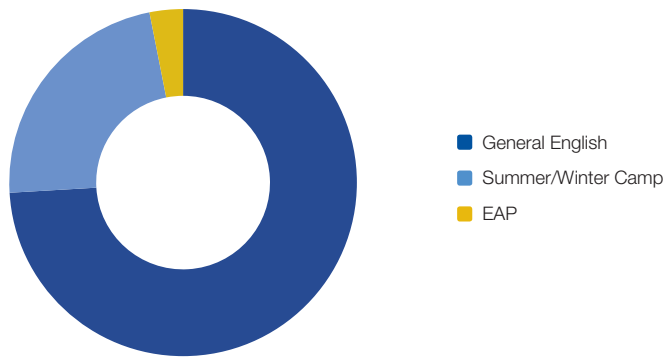
**Note:** 'Group' is defined as at least two students travelling and studying on the same itinerary.

# Q4 2018

## Overview

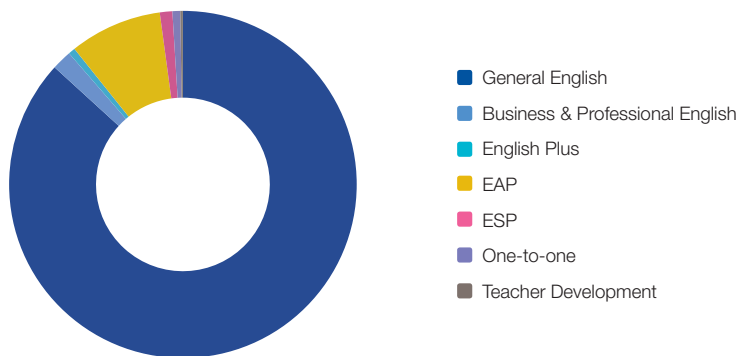
**Chart 4**

Student weeks by junior course types



**Chart 5**

Student weeks by adult course types



Almost three quarters of all junior student weeks were spent in General English (74%), which was followed by Summer/Winter Camps, representing 23% of student weeks. As is traditional, General English constituted the most popular course type for adult

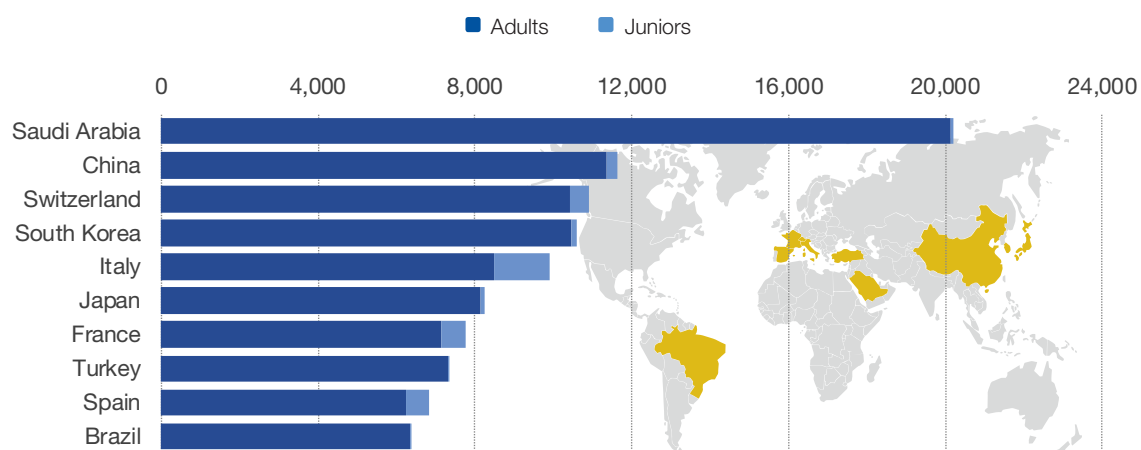
students (88% student weeks). The second most attended, English for Academic Purposes, accounted for 8.6% student weeks. Compared to Q4 2017, the proportions of adult programme types remained almost unchanged.

# Q4 2018

## Overview

### Chart 6

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



Saudi Arabia was, by far, the most significant contributor to the overall number of student weeks in the quarter (13.8% of all student weeks). Compared to Q4 2017, Saudi weeks grew by 4,782, marking the single biggest increase registered by a source country.

China, on the contrary, experienced a slight drop (-174 weeks). One important feeder appeared to be Switzerland, which outperformed South Korea thanks to a higher number of student weeks spent by juniors.

# **QUIC** QUARTERLY INTELLIGENCE COHORT