QUIC
QUARTERLY INTELLIGENCE COHORT

ENGLISH UK

Executive summary

Q3 2019

ENGLISH UK

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Prepared on behalf of:

English UK
47 Brunswick Court, Tanner Street, London SE1 3LH, UK | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

BONARD
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.bonard.com | info@bonard.com

Q3 2019
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 three (Q3) 2019 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. An executive summary will be made publicly available.

Added value has been achieved through the outsourcing of data processing and subsequent analysis to BONARD (formerly StudentMarketing), an independent market research firm and UNWTO Affiliate Member. BONARD is also a member of ESOMAR World Research. Two-tiered data validation and reporting 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.

Compared to the previous year's cohort, 20 new member centres signed up for the scheme in 2019, taking the total sample to 155 centres. Of the 155 centres initially participating in QUIC 2019, one has withdrawn from the scheme and two have closed down; thus, the Q3 cohort comprised 152 members. The current sample now represents 36% of the overall English UK member base. 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 a new historical comparative analysis of overall figures and breakdowns by source country, reflecting on feedback from the previous year.

Further enhancements in the provision of sectoral, regional and provider-type breakdowns are shared with QUIC members in the form of the accompanying pivot tables. These are supplied to members in a user-friendly way to offer them more granular intelligence and benchmarks tailored to their organisation.

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.

Q3 2019
Overview

Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	75	29.6%	101,504	24.2%
London	53	20.9%	104,126	24.8%
Northern England	37	14.6%	88,717	21.2%
Eastern England	28	11.1%	41,912	10.0%
South West England and The Channel Islands	28	11.1%	53,659	12.8%
Central England and Wales	19	7.5%	12,275	2.9%
Scotland and Northern Ireland	13	5.1%	17,175	4.1%
Total	**253**	**100.0%**	**419,368**	**100.0%**

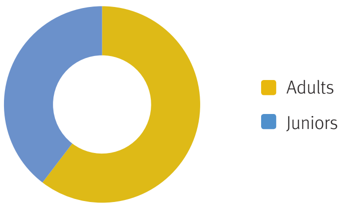
Note: Wales was merged with Central England, as not enough member centres from this region are participating in QUIC at the moment. Similarly, Northern Ireland was merged with Scotland.
Note: The number of participating member centre locations in Q3 2019 is 253. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Percentages do not add up to 100% due to rounding.

Q3 2019
Overview

The 152 English UK member centres that are signed up for the QUIC scheme in 2019 represent 275 teaching centre locations. Of these, 253 locations were operational in the third quarter of 2019 and registered a total of 419,368 student weeks.

The ratio of adult to junior student weeks at the centres declaring data for Q3 2019 averaged out at 60% to 40% (253,239 adult student weeks to 166,129 junior student weeks).

Chart 1
Student weeks by age group



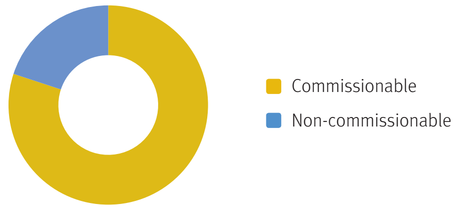
Data reported by 132 centres participating in both Q3 2018 and Q3 2019 points to a stable year-on-year development of student weeks (a minor increase of 0.2%). While junior student weeks were up by 1.3%, adults recorded a decrease of 0.4%.

Period	**Total** weeks	**Junior** weeks	**%**	**Adult** weeks	**%**
Q3 2018	377,770	133,755	35%	244,015	65%
Q3 2019	378,523	135,534	36%	242,989	64%
Change	+0.2%	+1.3%		-0.4%	

Note: The figures relate to a like-to-like comparison, which is based on data from centres reporting in both Q3 2018 and Q3 2019 (n=132 centres).

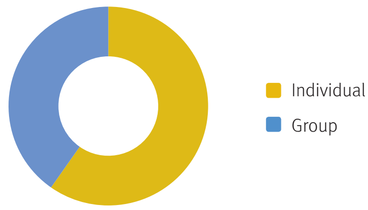
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



The third quarter of 2019 recorded the highest percentage of student weeks for which commissions were paid, as is traditional for this period of the year. Four in five student weeks were booked via a commissionable source.

Chart 3
Student weeks by booking type



Similarly, the significant proportion of junior student weeks seen this quarter resulted in group bookings recording their largest share of the first three quarters of 2019. In Q3 they represented 40% of all student weeks.

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

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Chart 4
Student weeks by junior course types

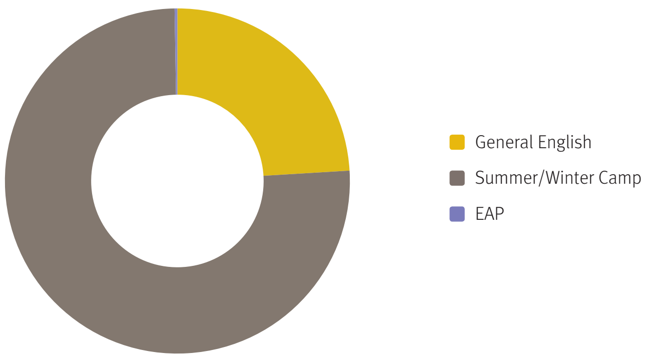
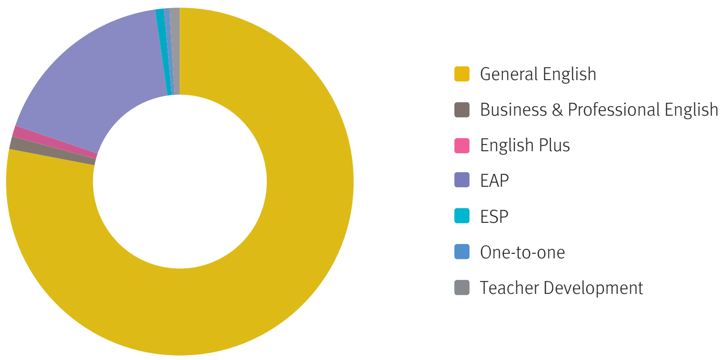


Chart 5
Student weeks by adult course types



Of all junior weeks, over three quarters (75.7%) were spent on Summer Camp programmes. While traditionally the most popular course for adult students was General English (78.0%), a notable share was recorded by English for Academic Purposes (17.5%).

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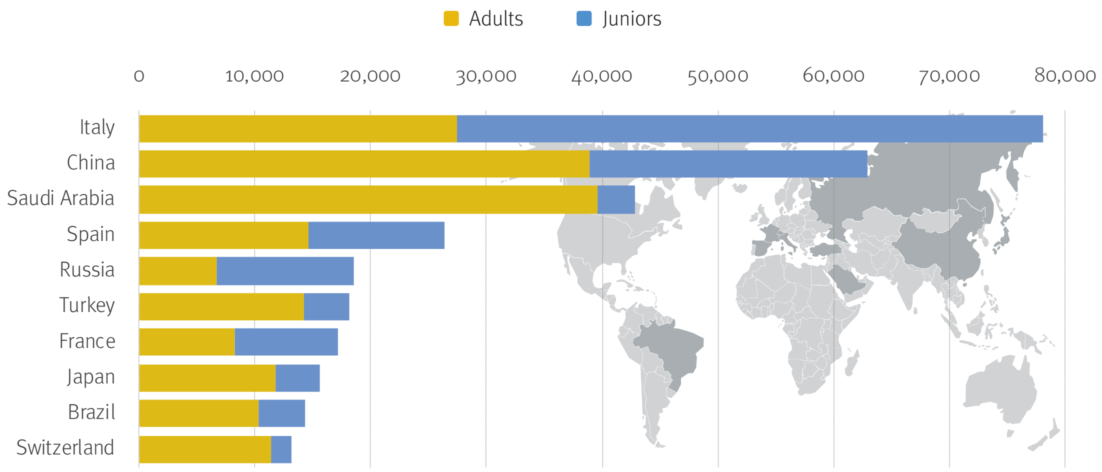
Chart 6

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



The largest market in the third quarter of 2019 was Italy, producing 78,055 student weeks (almost one fifth of all student weeks reported). Junior weeks constituted 65% of these (50,564), which made Italy the biggest contributor of bookings by this age band.

China and Saudi Arabia ranked second and third for overall student weeks, while taking first and second place for adult weeks (38,883 and 39,572, respectively).

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