QUIC QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q3 2023

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

STUDENT STATISTICS REPORT Q3 2023

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THE QUARTERLY INTELLIGENCE COHORT

INTRODUCTION

Market intelligence is a critical driver of business success. At English UK, we are dedicated to supporting our members with advanced and timely information. Our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), offers unique features not found in the annual student statistics reports.

QUIC monitors the industry's changing landscape to provide a timely and extensive analysis of its source markets. As a result, the data provided offers the participating member centres a competitive advantage. Whilst executive summaries are made publicly available, the full reports are exclusive to these QUIC members, enabling them to benchmark their performance and monitor market trends.

The QUIC reports helped guide the member centres through some of the marketing challenges of the pandemic years. Now, they aim to identify key source markets to prioritise and invest in for future growth.

To ensure the highest accuracy, the data processing and subsequent analysis have been outsourced to BONARD, an independent market research firm and a member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence is always precise and reliable.

In Q3 2023, QUIC participants increased by five compared to Q3 2022, reaching 125 member centres. The current sample represents 38% of the overall English UK member base, one of the highest participation rates to date. This serves as a testament to the growing significance of QUIC.

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 private and state sectors.

Having gathered complete data sets from participating members in 2019 and 2022, we were able to include a historical comparative analysis and provide granular data on recovery levels.

The enhanced sectoral, regional, and provider-type breakdowns are exclusively shared with the QUIC cohort in the form of accompanying pivot tables. These user-friendly tools offer the participating members more granular intelligence and benchmarks tailored specifically to their organisation.

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.

IN-DEPTH INSIGHTS INTO 100+ ELT SOURCE MARKETS SENDING INTERNATIONAL STUDENTS TO ENGLISH UK MEMBER CENTRES

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GENERAL OVERVIEW

Q3 2023 AT A GLANCE

Table 1
QUIC region summary

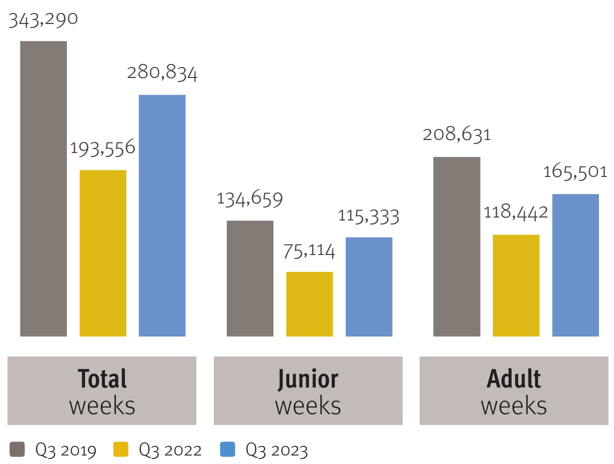
Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South & South Eastern England	62	30.2	78,743	26.6
London	48	23.4	80,558	27.2
Northern England	29	14.1	53,822	18.2
Eastern England	25	12.2	32,105	10.8
South West England & the Channel Islands	24	11.7	37,312	12.6
Central England and Wales	11	5.4	7,686	2.6
Scotland & Northern Ireland	6	2.9	6,271	2.1
Total	**205**	**100.0**	**296,498**	**100.0**

n=125 participating English UK members in Q3 2023
Note: The number of participating teaching centre locations in Q3 2023 is 205. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and do not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

The 125 English UK member centres that subscribe to QUIC 2023 represented 220 teaching centre locations. In Q3, 205 of these were open (+13% more than in Q3 2022). Collectively, these premises taught 296,498 student weeks.

The overall student week volume in Q3 2023 reached 82% of Q3 2019 pre-pandemic levels. Specifically, adults recovered 79% of their 2019 student week volume while juniors recovered 86%.

Chart 1
Like-to-like comparison of student weeks by quarter



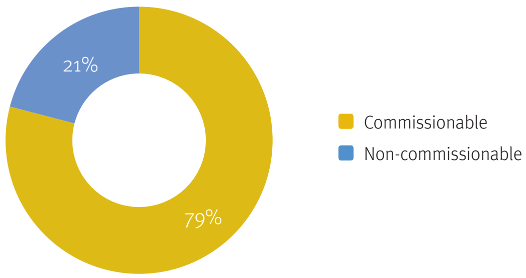
A like-to-like comparison with Q3 2022 shows that junior student weeks grew by 54% to reach a total of 115,333. Adult student weeks also showed positive growth, increasing by 40% to 165,501 in Q3 2023. At 60% to 40%, the adults-to-juniors student week ratio mirrored Q3 2019.

Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q3 2019 vs Q3 2023	-18%	-14%	-21%
Q3 2022 vs Q3 2023	+45%	+54%	+40%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=112 member centres).
Note: Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

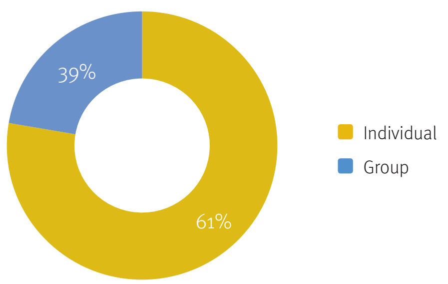
Chart 2
Student weeks by booking source



n=125 member centres participating in Q3 2023

In Q3 2023, 79% of the total student weeks were commissionable, and 21% were non-commissionable. Like-to-like comparisons reveal that the proportion of commissionable weeks was slightly lower than in previous years (80% in Q3 2022 and Q3 2019).

Chart 3
Student weeks by booking type



n=125 member centres participating in Q3 2023

Group bookings in Q3 2023 returned to pre-pandemic levels. Based on like-to-like comparisons, the ratio was 60% individual to 40% group bookings, mirroring Q3 2019.

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

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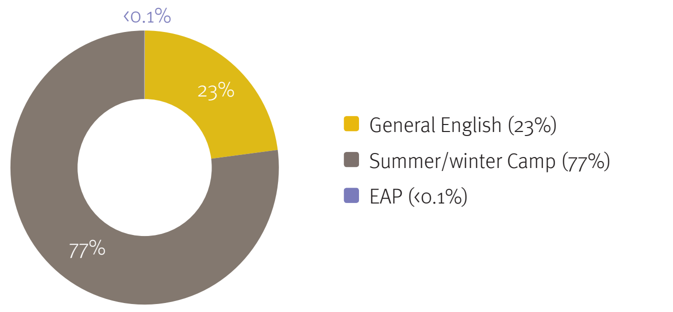
GENERAL OVERVIEW

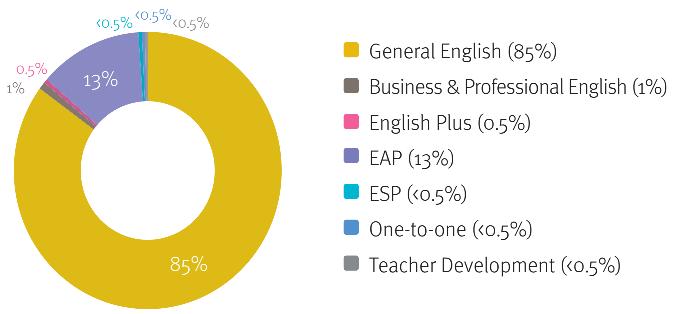
Q3 2023 AT A GLANCE

Chart 4
Student weeks by junior course types



n=125 member centres participating in Q3 2023

Chart 5
Student weeks by adult course types



n=125 member centres participating in Q3 2023

As traditionally observed in Q3, Summer/Winter Camp was the most popular course type for juniors (77% of the total), with a like-to-like comparison showing a 48% increase compared to Q3 2022. The volume reached 88% of Q3 2019 levels.

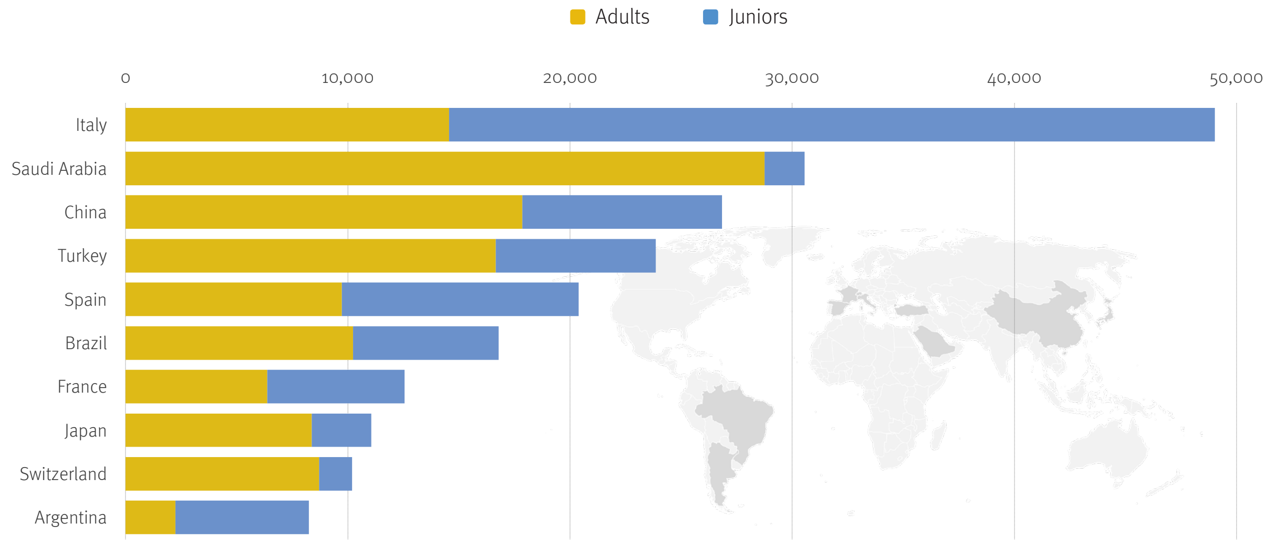
Even higher year-on-year growth was seen for juniors' General English courses (+74%) although this figure was still 20% lower than in Q3 2019.

All adult course types except Teacher Development saw positive growth between Q3 2022 and Q3 2023. General English, the most popular course type, recovered 85% of Q3 2019 volume.

Adults' English for Academic Purposes grew by 47% (+6,869 student weeks), driven predominately by Chinese student weeks.

Chart 6

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



n=125 centres participating in Q3 2023

The top 10 source countries in Q3 2023 accounted for 71% of the total student weeks.

Italy, which has traditionally been the strongest source market in third quarters, kept its leading position in Q3 2023 with 49,028 student weeks. Saudi Arabia (30,561 student weeks) was second overall.

In terms of the greatest absolute growth, China was the top-growing source market (+16,414 student weeks compared to Q3 2022), outperforming Italy by 62 student weeks. Up until mid-August 2023, groups from China were unable to travel to the UK. Therefore, further recovery for China is expected in 2024.

Italy and Spain were the top source countries for junior student weeks. China, Turkey, and Brazil surpassed France, which has traditionally been strong for this age segment, moving it to 6th place.

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