QUIC

QUARTERLY INTELLIGENCE COHORT

ENGLISH UK

Executive summary

Q2 2019

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Q2 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 two (Q2) 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 two (Q2) 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 Of the 155 centres initially participating in QUIC 2019, one has withdrawn from the scheme, thus the Q2 cohort was 154 members. The current sample now represents 37% 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.

Q2 2019
Overview

Table 1
QUIC region summary

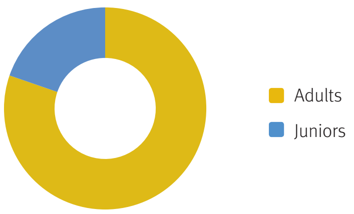
Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	48	28.6%	44,551	23.1%
London	39	23.2%	52,136	27.1%
South West England and the Channel Islands	25	14.9%	30,073	15.6%
Northern England	24	14.3%	36,510	19.0%
Eastern England	19	11.3%	19,022	9.9%
Scotland and Northern Ireland	8	4.8%	6,977	3.6%
Central England and Wales	5	3.0%	3,290	1.7%
Total	**168**	**100.0%**	**192,558**	**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 Q2 2019 is 168. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Student weeks by region were rounded and do not add up to the total sum of student weeks.

Q2 2019
Overview

The 154 English UK member centres that reported in Q2 2019 represent 267 teaching centre locations. Of these, 168 locations were operational in the second quarter of 2019 and registered a total of 192,558 student weeks.
Overall, 80% of student weeks were spent by adults (154,618). The volume of junior student weeks was greater in Q2 (20%, 37,940) than in Q1 2019 (14%, 24,058).

Chart 1
Student weeks by age group



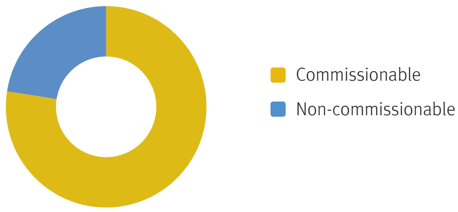
The year-on-year comparison below, which draws data from 134 centres participating in both quarters, reveals a dip in the total number of student weeks (-3.3%). Whilst adult student weeks dropped by 5%, junior student weeks increased by 7.8%. Junior student weeks thus represented 15% of all student weeks at member centres, a modest increase compared to Q2 2018 (13%).

Period	Total weeks	Junior weeks	%	Adult weeks	%
Q2 2018	180,250	23,879	13%	156,371	87%
Q2 2019	174,229	25,748	15%	148,481	85%
Change	-3.3%	+7.8%		-5.0%	

n=134 centres

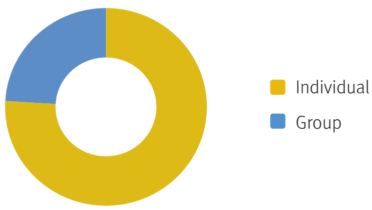
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



More than three quarters of all student weeks (77%, 149,167) were booked through a commissionable source.

Chart 3
Student weeks by booking type



Group bookings in the second quarter of 2019 represented 24% of all student weeks (46,289).

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

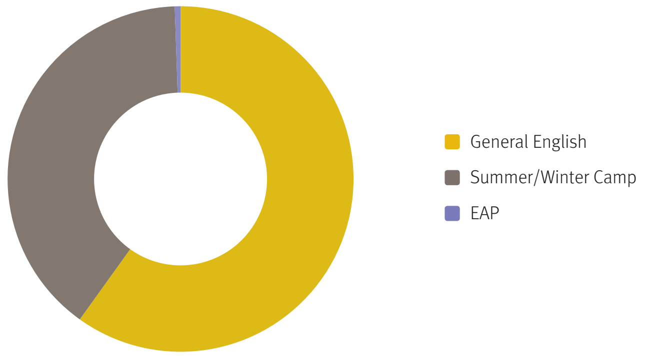
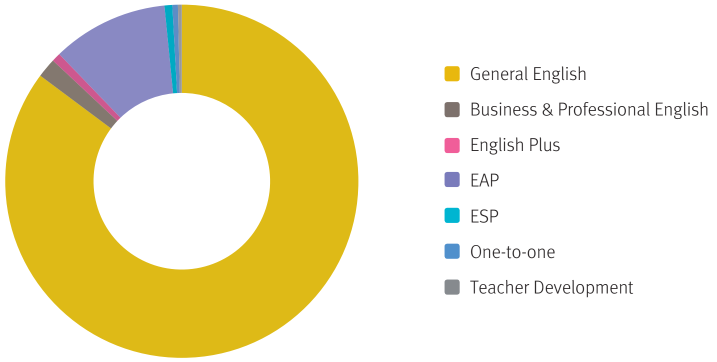


Chart 5
Student weeks by adult course types



With regard to juniors, 59.9% of all course weeks were spent studying General English. Summer and Winter Camps was the second most popular choice of course type (39.6% of student weeks), English for Academic Purposes (EAP) accounted for 0.5% weeks generated by juniors. As for programme preferences of adults, 85% of all course weeks were represented by adults enrolled in General English. EAP, the second most popular programme type, accounted for 11% of all weeks followed by Business and Professional English.

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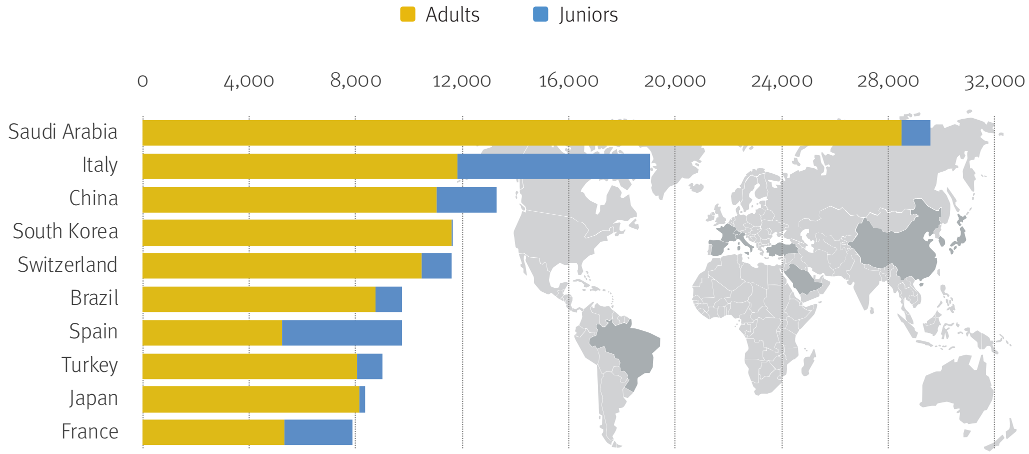
Chart 6

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



Saudi Arabia was the most productive market in the overall ranking. Compared to Q2 2018, China replaced Turkey in the top five market ranking. Italy remains the second most productive market overall and was also the leading source country for junior student weeks, generating 19% (7,214 student weeks) of all under-18 student weeks. Saudi Arabia, Italy, and South Korea were the top source countries for adult student weeks, with this age band constituting 96%, 62%, and close to 100% (respectively) of student weeks.

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