QUIC

QUARTERLY INTELLIGENCE COHORT

ENGLISH UK

Executive summary

Q1 2022

ENGLISH UK

englishuk.com/quic

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 | data@bonard.com

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Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information.

As in the pre-pandemic years, our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), continues on a quarterly basis. It introduces features not available in our annual student statistics reports and this is the executive summary of the first report in the 2022 series.

QUIC provides an in-depth analysis of the UK English language teaching (ELT) industry's source markets. Whilst the executive summaries are made publicly available, the full reports are exclusive to QUIC members, who can use them to benchmark their performance and monitor market trends.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm, UNWTO Affiliate Member and member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence remains exact, precise and reliable.

Members can be confident in the robustness of this quarter one (Q1) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

In 2022, 120 member centres signed up for the scheme. 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.

Having collected the full data set from participating members in 2021, it was possible to return to featuring a historical comparative analysis not only of overall figures but also by various breakdowns.

The enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort 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 visit www.englishuk.com/quic or 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.

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Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	25	25.0%	13,979	18.1%
London	23	23.0%	26,208	33.9%
Northern England	19	19.0%	17,243	22.3%
South West England and The Channel Islands	15	15.0%	9,352	12.1%
Eastern England	10	10.0%	6,169	8.0%
Central England and Wales	4	4.0%	2,164	2.8%
Scotland and Northern Ireland	4	4.0%	2,187	2.8%
Total	**100**	**100.0%**	**77,302**	**100.0%**

Note: The number of participating member centre locations in Q1 2022 is 100. This number differs per quarter and depends on when teaching centre locations are operational.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

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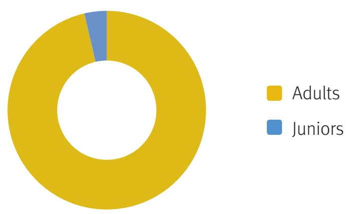
Overview

The 120 English UK member centres that signed up for the QUIC scheme in 2022 represent 227 teaching centre locations. In Q1 2022, 100 teaching centre locations were operational and recorded a total of 77,302 student weeks. Of these, 96% (74,486) were adult student weeks, while junior student weeks made up the remaining 4% (2,815).

Chart 1

Student weeks by age group



The number of student weeks recorded by centres participating in both Q1 2022 and Q1 2021 grew between the two periods by 172%. Although both junior and adult student weeks increased significantly, the volumes of student weeks per centre have not yet reached pre-pandemic levels. This specifically applies to junior figures, which constituted a much larger proportion of all student weeks in first quarters before 2020 than it did in 2022 (e.g., 14% in Q1 2019).

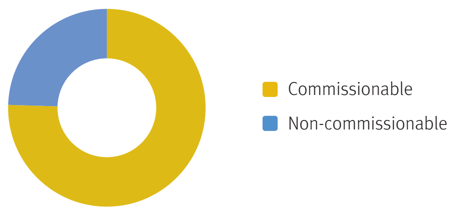
Period	**Total** weeks	**Junior** weeks	**%**	**Adult** weeks	**%**
Q1 2021	28,386	59	0.2%	28,327	99.8%
Q1 2022	77,302	2,815	3.6%	74,486	96.4%
Change	+172%	+4,650%		+163%	

Note: The figures relate to a like-to-like comparison, which is based on data from centres reporting in both Q1 2021 and Q1 2022 (n=119 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

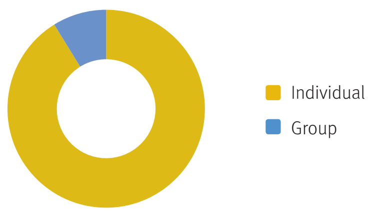
Student weeks by booking source



Three quarters of all student weeks were booked through a commissionable source.

Chart 3

Student weeks by booking type



Student weeks within group bookings constituted 9% of the total. For comparison, in the years before 2020, about one fifth of student weeks in first quarters were booked by groups.

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

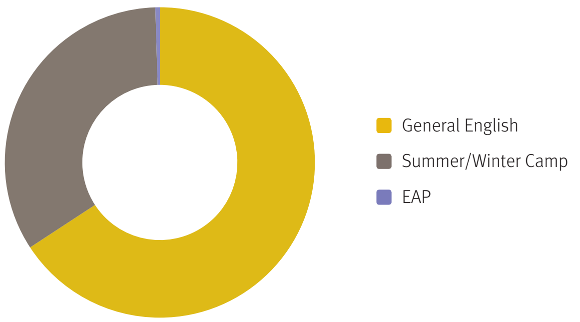
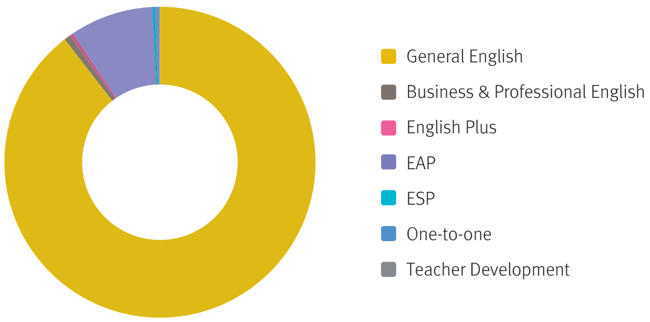


Chart 5

Student weeks by adult course types



General English, the most popular junior programme type, accounted for 66% of all junior student weeks in Q1 2022. Summer/Winter Camps followed, with a share of almost 34%, and English for Academic Purposes (EAP) for juniors represented less than 0.5%.

The distribution of student weeks delivered at adult courses showed the traditional first-quarter pattern. General English led, with almost nine in ten student weeks. EAP represented 9% of adult student weeks, and the remaining 1.8% was spread across the other adult course types.

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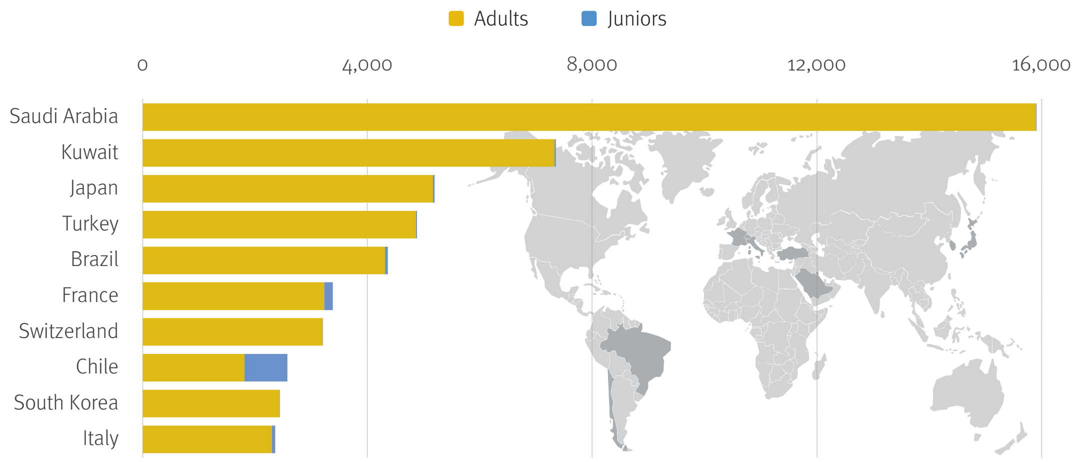
Chart 6

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



Q1 2022 saw the traditionally strong markets of Italy, South Korea and China falling down the rankings.

Saudi Arabia, with 15,908 student weeks, held onto its usual top position. The second strongest source market, as in Q1 2021, was Kuwait, with 7,353 student weeks.

The top junior source markets in Q1 2022 were Chile (762 student weeks), Thailand (494) and Argentina (264). In all three cases, the majority of junior student weeks was sourced from a single member institution (a different member centre for each of the markets).

Italy and Spain, previously the two highest ranked source markets for junior student weeks, sank to tenth (Italy; 65 junior student weeks) and fourth (Spain; 190 junior student weeks) position. Legislative changes related to Brexit may be a major factor in this development.

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