QUIC QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q2 2024

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

QUARTERLY INTELLIGENCE COHORT

STUDENT STATISTICS REPORT **Q2 2024**

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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 Q2 2024, QUIC participants increased by one compared to Q 2023, reaching 126 member centres. The current sample represents 39% 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, 2023 and 2024, 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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QUIC QUARTERLY INTELLIGENCE COHORT

GENERAL OVERVIEW

Q2 2024 AT A GLANCE

Table 1

QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	39	27.9	43,340	31.2
South and South Eastern England	36	25.7	32,745	23.6
Northern England	21	15.0	27,056	19.5
South West England and the Channel Islands	20	14.3	16,966	12.2
Eastern England	14	10.0	11,877	8.6
Central England and Wales	6	4.3	3,817	2.7
Scotland and Northern Ireland	4	2.9	3,073	2.2
Total	**140**	**100.0**	**138,874**	**100.0**

n=126 participating English UK members in Q2 2024

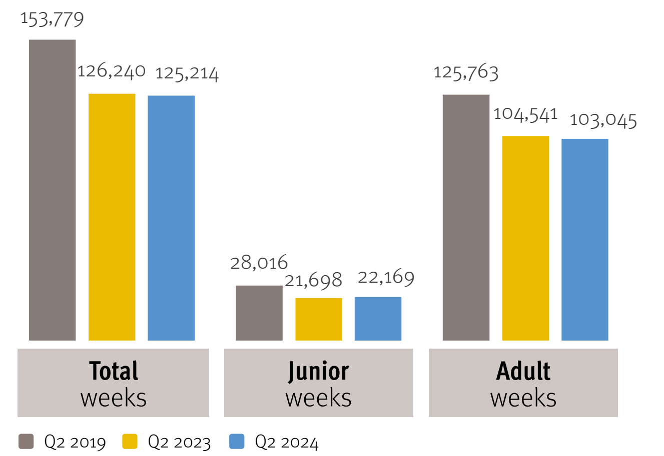
Note: The number of participating teaching centre locations in Q2 2024 is 140. This number differs per quarter and depends on when seasonal teaching centre locations are operational.

Note: Figures of student weeks per region were rounded and may 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.

A total of 126 UK member centres subscribed to QUIC 2024, representing 242 teaching centre locations. Of these, 140 were operational in Q2 2024, marking a 1% increase compared to Q2 2023. Together, they registered a total of 138,874 student weeks. Overall, 83% of student weeks were spent by adults and 17% by juniors.

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



In a like-for-like comparison, the total number of student weeks in Q2 2024 nearly matched that of Q2 2023, with a slight decline of 1% (-1,025 weeks). Heading into the summer period, junior student weeks saw a modest increase of 2% (+471 weeks) in Q2 2024 compared to Q2 2023. Meanwhile, adult student weeks declined by 1% (-1,496 weeks).

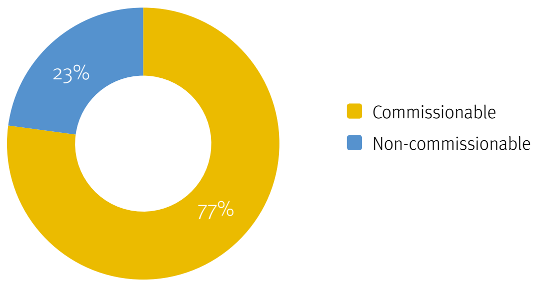
Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q2 2019 vs Q2 2024	-19%	-21%	-18%
Q2 2023 vs Q2 2024	-1%	+2%	-1%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=108 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).

Comparing Q2 2019 to Q2 2024, the student week volume reached 81% of its 2019 level, with adult weeks recovering to 81% and junior weeks to 78% of their respective 2019 volumes. This overall recovery rate was consistent with that observed in Q1 2024.

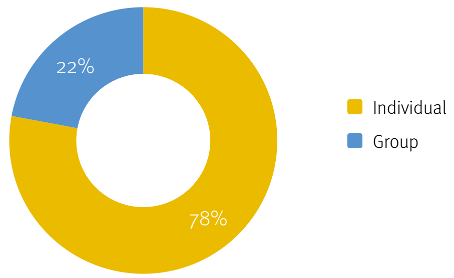
Chart 2
Student weeks by booking source



n=126 member centres participating in Q2 2024

More than two thirds of all student weeks (77%) were booked through commissionable booking sources. Compared to Q2 2023, the largest increase in commissionable weeks came from Saudi Arabia (+3,419 student weeks).

Chart 3
Student weeks by booking type



n=126 member centres participating in Q2 2024

In Q2 2024, individuals accounted for 78% and groups for 22% of bookings, a ratio that has remained stable over the past few years. Individuals made up 77% of bookings in both Q2 2024 and Q2 2023 and 78% in Q2 2019 (based on like-for-like comparisons).

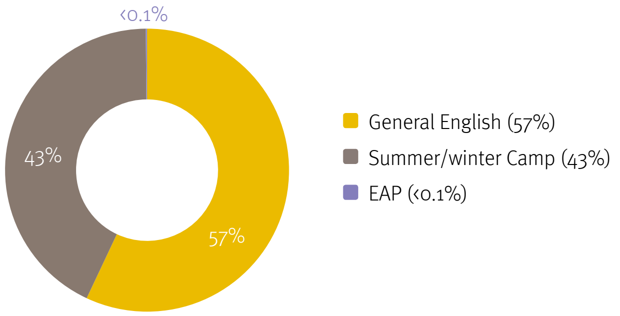
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

GENERAL OVERVIEW

Q2 2024 AT A GLANCE

Chart 4

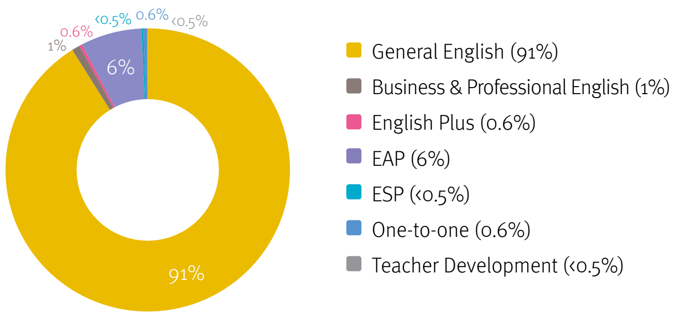
Student weeks by junior course types



n=126 member centres participating in Q2 2024

Chart 5

Student weeks by adult course types



n=126 member centres participating in Q2 2024

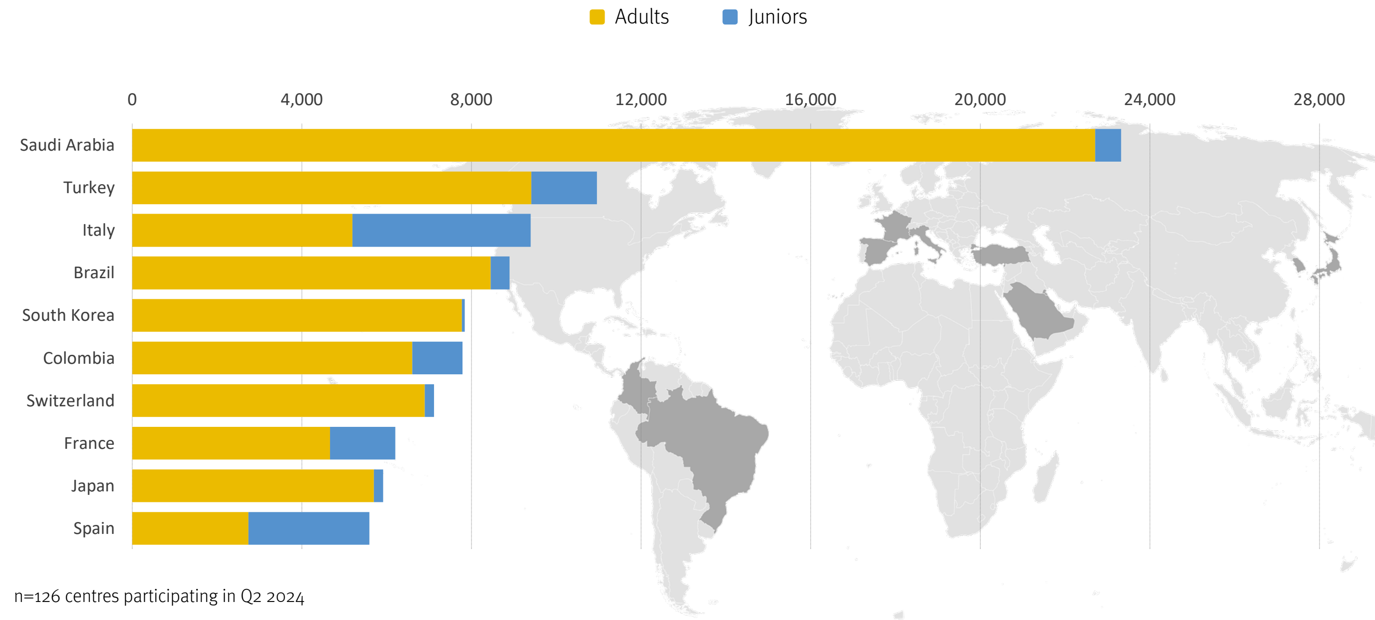
In Q2 2024, there was a notable shift in the distribution of junior student weeks across course types compared to Q1 2024. While 82% of all junior student weeks were General English in Q1 2024, this share dropped to 57% in Q2 2024.

Summer/Winter Camps, which traditionally gain prominence during this quarter, accounted for 43% of all junior weeks.

For adults, General English courses remained the most popular, making up 91% of all student weeks. In Q2 2024, adult General English weeks remained nearly level with Q2 2023, experiencing only a slight 1% decline.

Chart 6

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



n=126 centres participating in Q2 2024

In Q2 2024, the top 10 source countries accounted for 67% of total student weeks. Seventy percent of the adult and 54% of the junior student weeks came from these 10 markets.

Saudi Arabia remained the leading source country, consistent with Q2 2023. The gap observed in Q1 2024 persisted, with Saudi Arabia generating 23,322 student weeks – more than twice as many as second-ranked Turkey, with 10,955 weeks.

Italy and Brazil experienced the largest year-on-year declines in absolute figures, with losses of 1,767, and 1,099 weeks, respectively. In contrast, Saudi Arabia, Turkey and Colombia had the highest increases of student weeks in year-on-year change (+3,905, +2,152 and +1,254 weeks, respectively).

Although outside of these overall top 10 markets, Mexico emerged as the third largest source country for junior student weeks (sending 1,704). Only Italy and Spain surpassed it.

ENGLISH UK

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