QUIC
QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q4 2024

INCLUDING Q1 - Q4 CUMULATIVE SUMMARY

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

QUIC QUARTERLY INTELLIGENCE COHORT

STUDENT STATISTICS REPORT Q4 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 Q4 2024, QUIC participants number was equal to that in Q4 2023, 125 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 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

Q4 2024 AT A GLANCE

Table 1
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
London	29	26.9	35,482	32.1
South and South Eastern England	25	23.1	20,269	18.3
Northern England	21	19.4	27,574	25.0
South West England and the Channel Islands	14	13.0	12,190	11.0
Eastern England	11	10.2	9,017	8.2
Central England and Wales	5	4.6	3,033	2.7
Scotland and Northern Ireland	3	2.8	2,943	2.7
Total	**101**	**100.0**	**110,507**	**100.0**

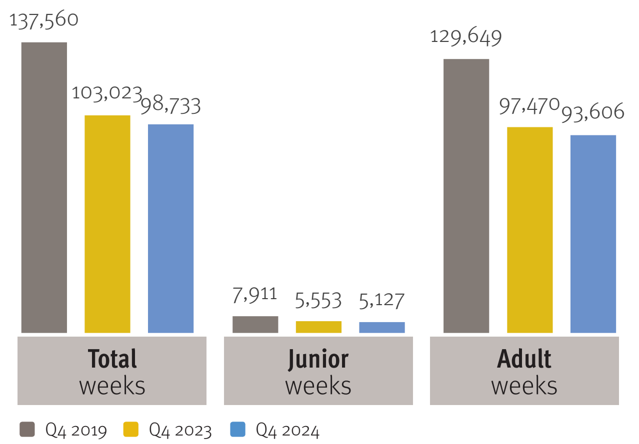
n=125 participating English UK members in Q4 2024
Note: The number of participating teaching centre locations in Q4 2024 is 244. This number differs per quarter and depends on when teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and may not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

During Q4 2024, a total of 125 UK member centres participated in QUIC, covering 244 teaching centre locations. Of these, 108 were operational during this period, reflecting a 7% increase from Q4 2023. These centres collectively reported a total of 110,507 student weeks.

Compared to Q4 2019, in Q4 2024, the overall recovery rate was at 72%. Adult student weeks also recovered to 72%, whereas junior student weeks recovered at a slower pace, reaching 65%. This quarter recorded the weakest recovery across all four quarters of 2024.

Chart 1

Like-to-like comparison of student weeks by quarter



The ratio of adult to junior student weeks returned to the typical Q4 pattern, with adults accounting for 95% (104,896 student weeks) and juniors making up just 5% (5,612 student weeks).

A year-on-year comparison indicates an overall decline of 4% in student weeks from Q4 2023 to Q4 2024. Junior student weeks fell by 8%, while adult student weeks declined by 4%.

Table 2

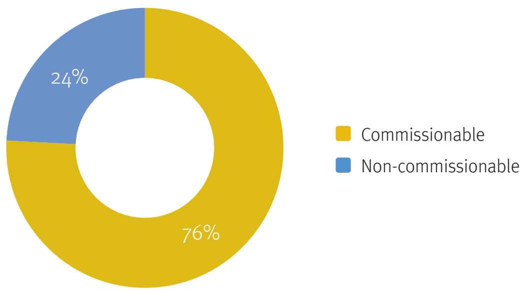
Year-on-year change in student weeks

	Total weeks	**Junior** weeks	**Adult** weeks
Q4 2019 vs Q4 2024	-28%	-35%	-28%
Q4 2023 vs Q4 2024	-4%	-8%	-4%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=105 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

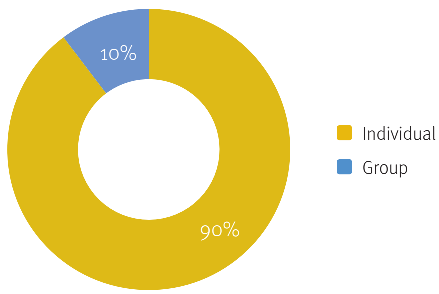


n=125 member centres participating in Q4 2024

In Q4 2024, commissionable student weeks accounted for 76%, while non-commissionable student weeks made up 24%. A like-for-like comparison shows that the share of commissionable weeks increased by 3% compared to previous years.

Chart 3

Student weeks by booking type



n=125 member centres participating in Q4 2024

In Q4 2024, individual bookings accounted for 90% of the total, while group bookings made up 10%. A year-on-year comparison shows that the ratio of individual to group bookings remained unchanged between Q4 2024 and Q4 2023. Both years exceeded Q4 2019, when individual bookings represented 86% of the total.

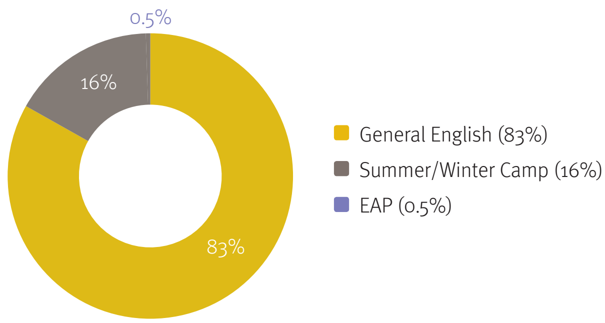
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

GENERAL OVERVIEW

Q4 2024 AT A GLANCE

Chart 4

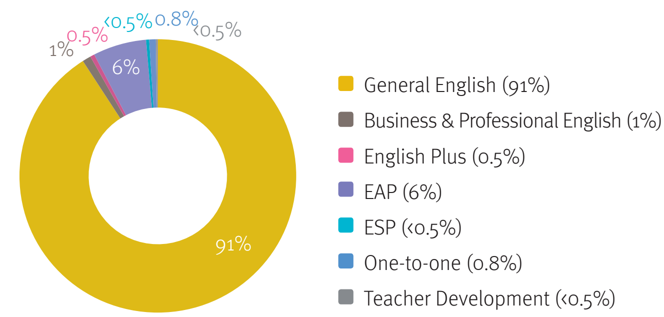
Student weeks by junior course types



n=125 member centres participating in Q4 2024

Chart 5

Student weeks by adult course types



n=125 member centres participating in Q4 2024

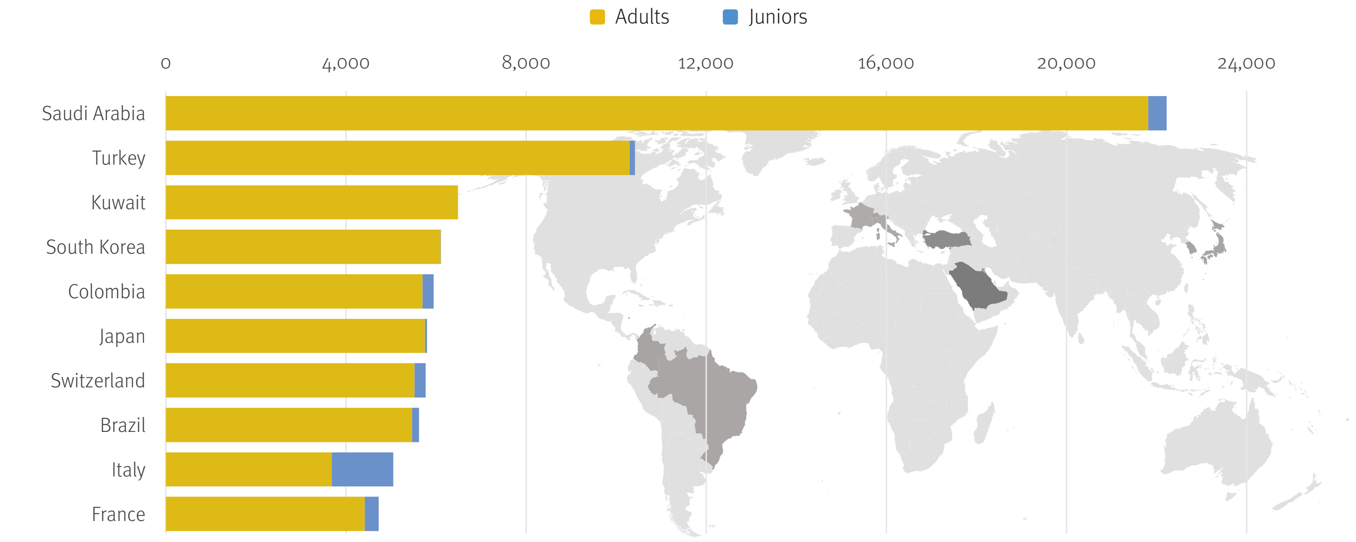
General English remained the most popular course type, accounting for 83% of junior enrolments and 91% of adult enrolments in Q4 2024.

However, when comparing data from Q4 2023 to Q4 2024, junior enrolments in General English declined by 13%, while adult enrolments saw a smaller drop of 2%.

For adults, English for Academic Purposes experienced the largest decline compared to the previous year, with a 25% decrease. This drop was primarily driven by China.

This marks the second consecutive quarter of decline in this course type, largely due to the missing student weeks from China for this course type.

Chart 6
Student weeks by age group and source country (top 10 markets)



n=125 centres participating in Q4 2024

In Q4 2024, the top 10 source countries continued to account for 71% of total student weeks, which is 3% higher than in Q4 2023.

Saudi Arabia remained the leading source country, contributing 22,228 student weeks, a trend consistent with Q1 and Q2 2024. Turkey followed as the second-largest source country, trailing Saudi Arabia by 11,808 student weeks. Turkey also recorded the highest growth, adding 2,311 student weeks in Q4 2024 compared to Q4 2023.

Switzerland experienced the most significant decline, dropping from third to seventh place. Switzerland's overall decrease (-1,252) is lower than the decline in its adult student weeks (- 1,305), the market saw a minor increase in junior student weeks (+53). Brazil followed with the second-largest decline, falling from fifth to eighth place with a reduction of 1,113 student weeks between Q4 2023 and Q4 2024.

These shifts allowed Colombia and South Korea to rise in the rankings. Despite the fact that the UK government removed visa-free entry for Colombian students in November 2024, the country still experienced growth on Q4 2023, adding 705 student weeks.

2024 SUMMARY

OVERVIEW

This section presents cumulative data for the full 2024 year. Unless otherwise indicated, the figures relate to data from 125 English UK member centres in QUIC that participated in four quarters of 2024.

Table 3

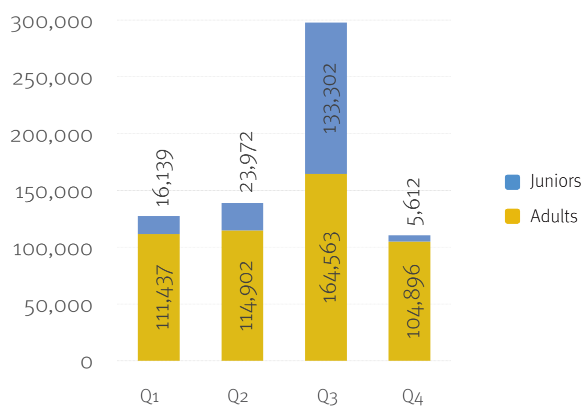
QUIC 2024 region summary

Region	Q1 No. of returns	Q1 Proportion of returns	Q2 No. of returns	Q2 Proportion of returns	Q3 No. of returns	Q3 Proportion of returns	Q4 No. of returns	Q4 Proportion of returns	2024 No. of returns	2024 Proportion of returns
		%		%		%		%		%
London	29	25.7	39	27.9	59	26.5	29	26.9	156	26.7
South and South Eastern England	26	23.0	36	25.7	64	28.7	25	23.1	151	25.9
Northern England	23	20.4	21	15.0	28	12.6	21	19.4	93	15.9
South West England and the Channel Islands	16	14.2	20	14.3	29	13.0	14	13.0	79	13.5
Eastern England	10	8.8	14	10.0	23	10.3	11	10.2	58	9.9
Central England and Wales	5	4.4	6	4.3	15	6.7	5	4.6	31	5.3
Scotland and Northern Ireland	4	3.5	4	2.9	5	2.2	3	2.8	16	2.7
Total	**113**	**100.0**	**140**	**100.0**	**223**	**100.0**	**108**	**100.0**	**584**	**100.0**

Note: The number of participating member centres was 125.
Note: The number of returns differs per quarter as this is submitted on a 'per teaching premise location' basis and so depends on when teaching centre locations are operational.
Note: Percentages may not add up to 100% due to rounding.

Chart 7

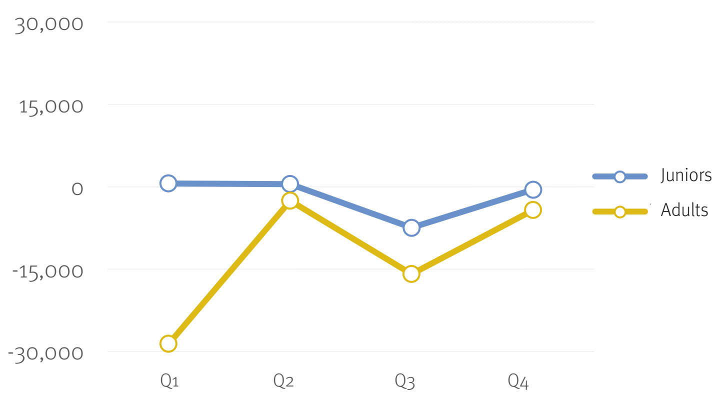
Student weeks by quarter and age group



Note: The figures in Chart 10 relate to data from centres reporting in four quarters of 2024 (n=125 centres).

Chart 8

Absolute year-on-year change in student weeks (2023 vs 2024)



Note: The figures in Chart 11 relate to a like-to-like comparison, which is based on data from centres participating in both 2023 and 2024 (n=115 centres).

Chart 9
Student weeks by quarter and booking source

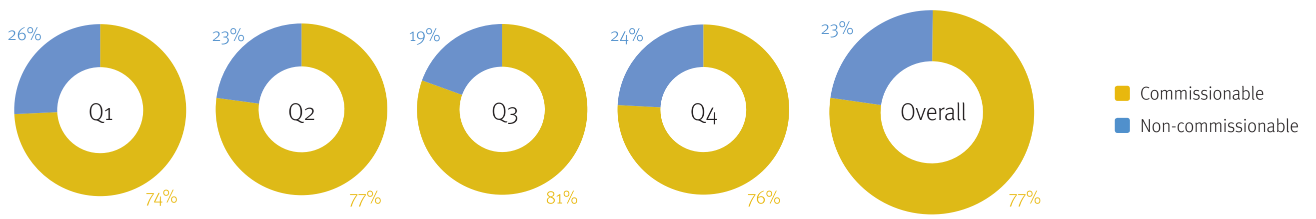


Chart 10
Student weeks by quarter and booking type

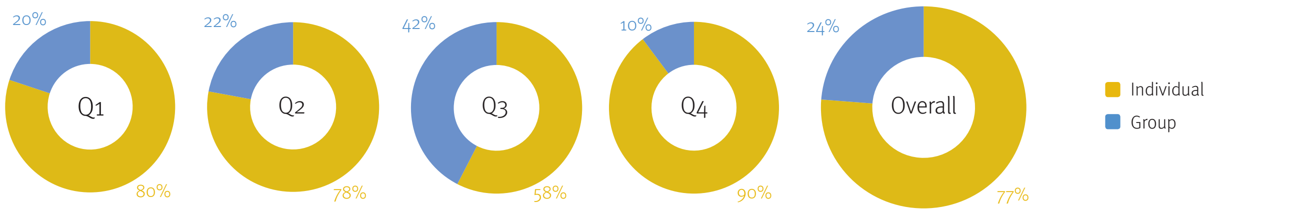


Chart 11
Student weeks by quarter and junior course types

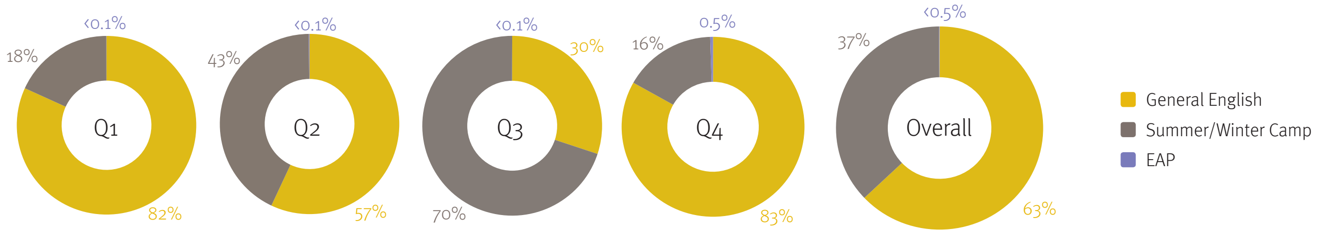
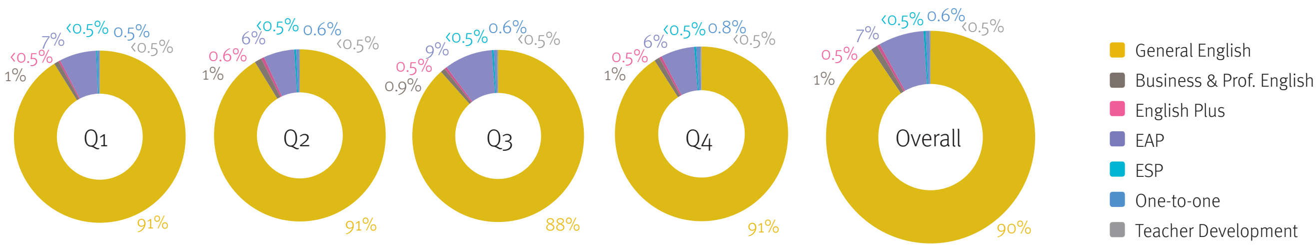


Chart 12
Student weeks by quarter and adult course types



Note: Percentages may not add up to 100% due to rounding.
Note: The figures in Charts 9, 10, 11, and 12 relate to data from centres reporting in four quarters of 2024 (n=125 centres).

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