QUIC
QUARTERLY INTELLIGENCE COHORT

Market Report

Q1 2018

Executive Summary

ENGLISH UK

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Q1 2018
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 report that marks the beginning of the second year of 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. Membership is on a rolling annual basis, and all English UK centres can join the 2019 cohort up until March 2019. An executive summary will be made publicly available.

Added value has been achieved through the outsourcing of data processing to StudentMarketing, an independent market research firm and UNWTO Affiliate Member. StudentMarketing is also a member of ESOMAR World Research. The cleaning and fine-tuning of the data 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 one (Q1) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

Last year's QUIC cohort has been strengthened by the addition of 20 new members, taking total membership for 2018 to 144 centres. The current sample represents one third of the overall membership. 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 new components, namely:

- representation of Northern Ireland;
- regional classification of individual multi-centre locations;
- breakdown of student weeks by booking type;
- more detailed breakdown of adult course types;
- breakdown of junior course types;
- regional analysis of student weeks by course type;
- historical comparative analysis of overall figures, and in breakdowns by source country.

As the scheme enters its second year, we have been able to include comparative historical analysis which adds a new depth to the data. Further improvements, such as sectorial analysis or deeper regional insight, may be possible in future if the cohort becomes more representative, or if additional member data is sought.

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.

Q1 2018
Overview

Table 1
QUIC region summary

Region	**No. of** returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
South and South Eastern England	38	25.2%	34,900	19.4%
London	33	21.9%	52,360	29.1%
Northern England	24	15.9%	33,019	18.3%
South West England and The Channel Islands	22	14.6%	29,353	16.3%
Eastern England	18	11.9%	20,135	11.2%
Scotland and Northern Ireland	9	6.0%	4,288	2.4%
Central England and Wales	7	4.6%	5,933	3.3%
Total	**151**	**100.0%**	**179,989**	**100.0%**

Note: Percentages do not add up to 100% due to rounding. Figures of student weeks per region were rounded and do not add up to the total sum of student weeks.

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 centres in Q1 2018 is 144. The number of locations represented differs per quarter and depends on when the teaching premise locations are operational.

Q1 2018
Overview

The 144 English UK member centres (representing 151 teaching centre locations) registered a total of 179,989 student weeks in Q1 2018.

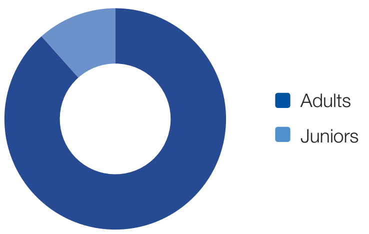
Comparative analysis of member centres that participated in both Q1 2017 and Q1 2018 points to an increase in both age segments:

Period	**Total** weeks	**Junior** weeks	%	**Adult** weeks	%
Q1 2017	146,325	14,010	10%	132,315	90%
Q1 2018	157,790	15,655	10%	142,135	90%
Change	+7.8%	+11.7%		+7.4%	

n=119 centres

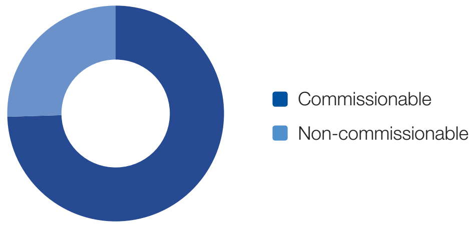
The ratio of adult to junior student weeks at the centres declaring data for Q1 2018 averaged out at 88% to 12% (159,145 adult student weeks to 20,844 junior student weeks).

Chart 1
Student weeks by age group



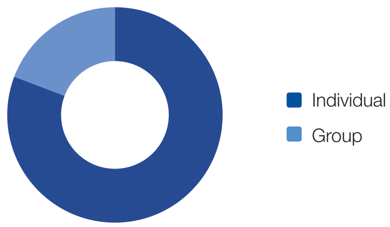
Note: Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 2
Student weeks by booking source



Of all declared student weeks, three quarters (134,117) were booked through a commissionable source (e.g. via a study abroad partner agency).

Chart 3
Student weeks by booking type



In the first quarter of 2018, student weeks by booking type were measured for the first time. Almost one fifth of student weeks (19%, 34,585) were bookings made by groups, defined as having at least two students travelling and studying on the same itinerary.

Q1 2018 Overview

Chart 4
Student weeks by junior course types

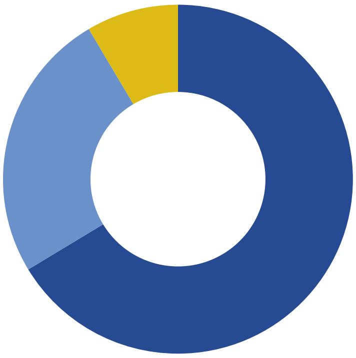
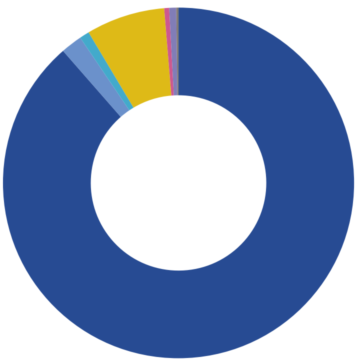


Chart 5
Student weeks by adult course types



As part of Q1 2018, more detailed course type reporting was put in place for both age bands.

General English was the most popular course type, representing 66.3% of junior weeks. One quarter of junior weeks were spent by students on Summer/ Winter Camps, and English for Academic Purposes (EAP) accounted for 8.5% weeks generated by this age band.

Adult students spent 88.6% of all weeks in General English courses. EAP was their second most popular choice of course type (7.3% of student weeks), followed by Business & Professional English (2%).

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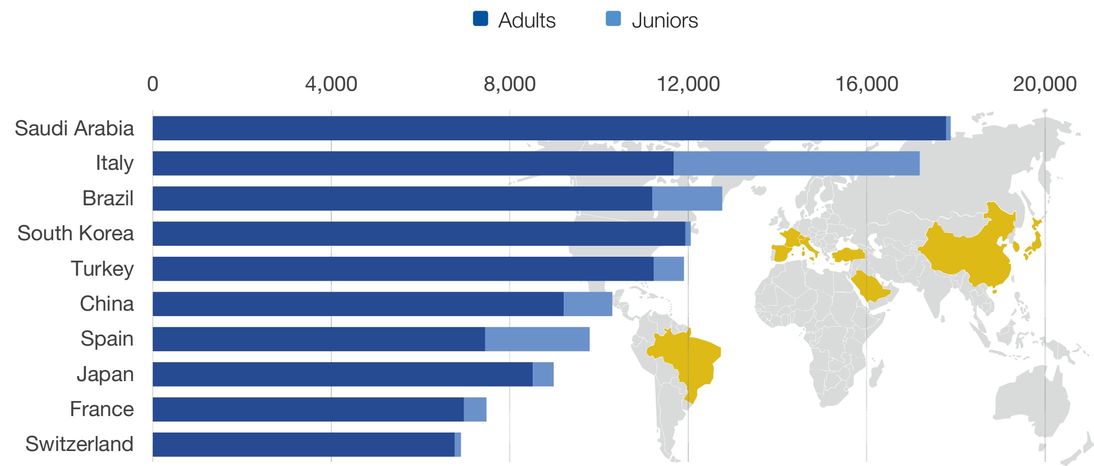
Chart 6
Student weeks by age group and source country (top 10 markets)



In terms of nationalities, Saudi Arabia was reported to be the top source country in Q1 (17,881 weeks). The majority of its student weeks were adult (99%). The second most productive market overall, Italy, was also the leading source country for junior student weeks (5,511), generating 26% of all under-18 student weeks. Brazil completed the top three ranking, occupying its highest place since the inception of the QUIC scheme.

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