QUIC QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q1 2024

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

STUDENT STATISTICS REPORT Q1 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 Q1 2024, QUIC participants increased by three compared to Q1 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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GENERAL OVERVIEW

Q1 2024 AT A GLANCE

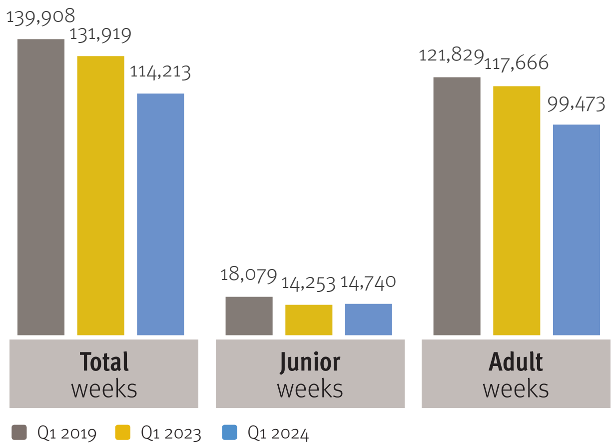
Table 1
QUIC region summary

Region	**No.** of returns	**Proportion** of returns	**Total** weeks	**Market** share
		%	Σ	%
London	29	25.7	42,046	33.0
South and South Eastern England	26	23.0	24,203	19.0
Northern England	23	20.4	27,586	21.6
South West England and the Channel Islands	16	14.2	14,183	11.1
Eastern England	10	8.8	13,443	10.5
Central England and Wales	5	4.4	3,191	2.5
Scotland and Northern Ireland	4	3.5	2,924	2.3
Total	**113**	**100.0**	**127,576**	**100.0**

n=126 participating English UK members in Q1 2024
Note: The number of participating teaching centre locations in Q1 2024 is 113. 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 English UK member centres subscribed to QUIC 2024. Together, these represented 239 teaching centre locations, of which 113 were operational in Q1 2024 (+5% compared to Q1 2023). Cumulatively they generated 127,576 student weeks. Adults accounted for 87% and juniors for the remaining 13%.

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



A like-for-like comparison with Q1 2023 shows an overall year-on-year decline of 13%. However this was not uniform across the age segments. Whilst adult student weeks dropped by 15% (-14,740), junior student weeks increased by 3% (+487 student weeks).

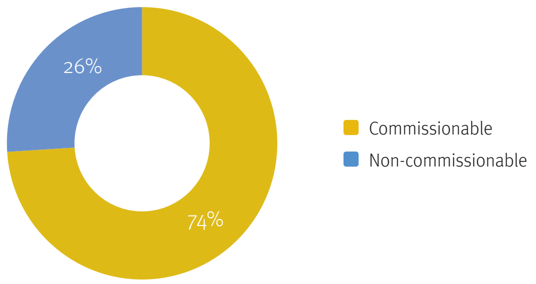
Table 2
Year-on-year change in student weeks

	Total weeks	Junior weeks	Adult weeks
Q1 2019 vs Q1 2024	-18%	-18%	-18%
Q1 2023 vs Q1 2024	-13%	+3%	-15%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=107 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).

Overall student week volume was at 81% of Q1 2019 (compared to 92% in Q1 2023).

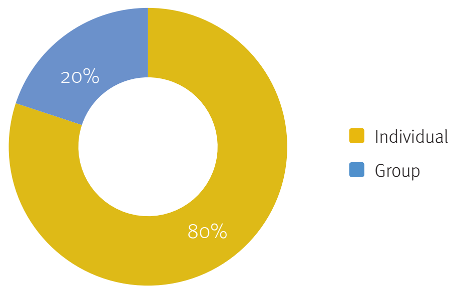
Chart 2
Student weeks by booking source



n=126 member centres participating in Q1 2024

In the first quarter of 2024, the most prevalent booking source was commisionable student weeks (74%). Historically this booking source dominates every quarter.

Chart 3
Student weeks by booking type



n=126 member centres participating in Q1 2024

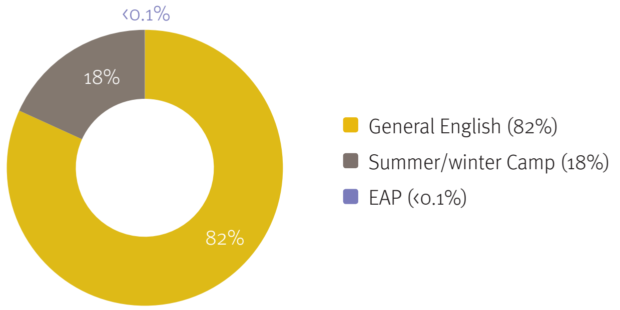
The proportion of individual to group bookings in Q1 2024 was 80% to 20%. This has remained broadly stable over the past few years. Based on a like-for-like comparison, the proportion of individual bookings was 79% in Q1 2024, 82% in Q1 2023 and 80% in Q1 2019.

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

GENERAL OVERVIEW

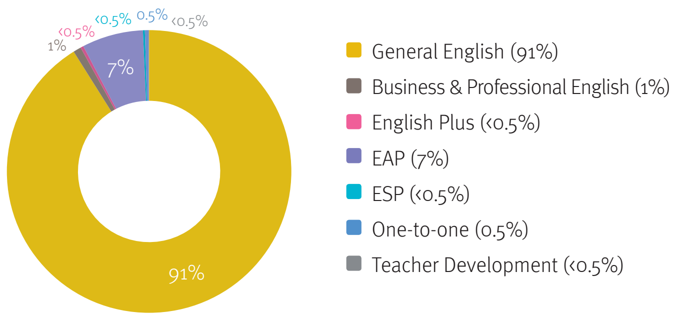
Q1 2024 AT A GLANCE

Chart 4
Student weeks by junior course types



n=126 member centres participating in Q1 2024

Chart 5
Student weeks by adult course types



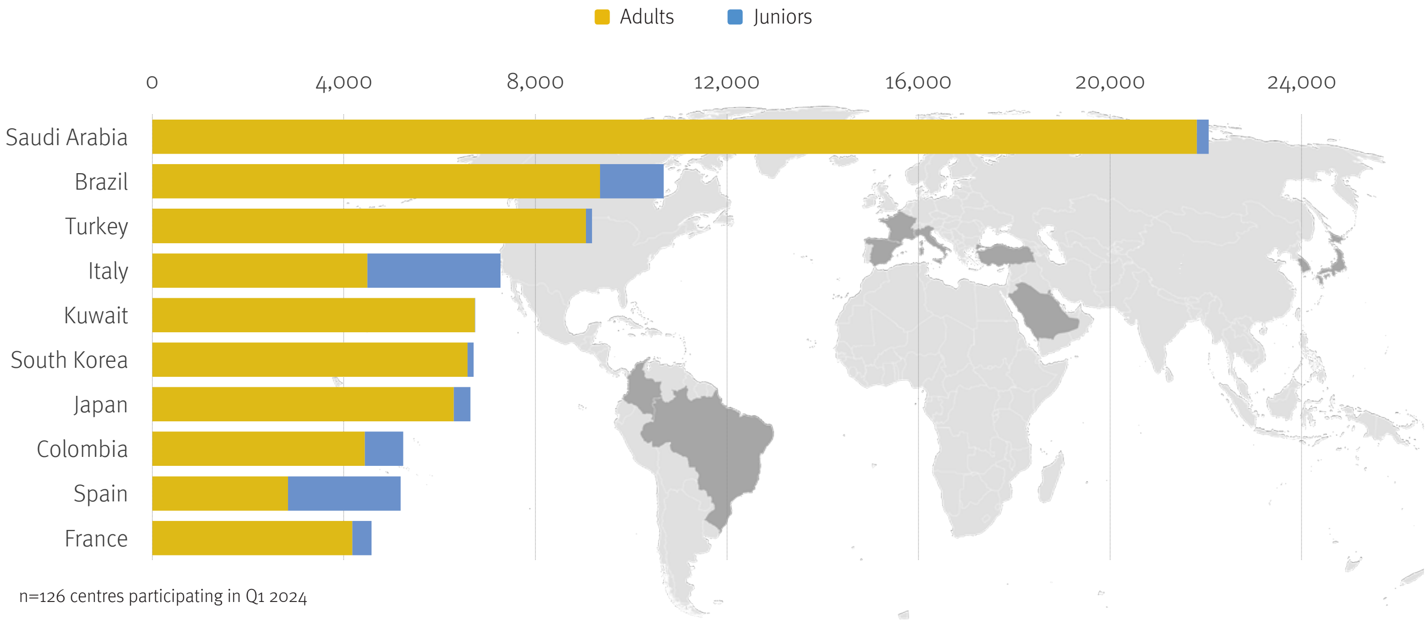
n=126 member centres participating in Q1 2024

General English courses remained the most popular course type, accounting for 91% of all adult student weeks and 82% of junior student weeks. The proportion was slightly lower in Q1 2019: 74% and 86%, respectively.

General English was the only junior course type that registered year-on-year growth compared to Q1 2023 (+10%). It reached 94% recovery rate compared to Q1 2019.

The number of adult student weeks in General English reached an 85% recovery rate compared to 2019. Adult student weeks grew year-on-year in all except the General English, ESP and One-to-One course types compared to Q1 2023. This growth was modest in absolute figures.

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



n=126 centres participating in Q1 2024

In Q1 2024, the top 10 source countries generated 66% of all student weeks.

The top 3 source markets in Q1 2024 were the same as in Q1 2023. Saudi Arabia with 22,059 student weeks had more than twice as many as second-ranked Brazil (10,683). Turkey followed with 8,833 student weeks.

Despite maintaining their positions, Saudi Arabia, Brazil, and Turkey all delivered considerably fewer student weeks than in Q1 2023 (-4,029, -3,629, and -2,025 student weeks, respectively).

Compared to Q1 2023, Japan, ranking 7th, registered the highest year-on-year decrease in absolute figures (4,213 fewer student weeks, or -40%).

In Q1 2024, Italy, Spain, and Brazil emerged as the top three junior source markets, accounting for 40% of the total junior student weeks.

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