QUIC QUARTERLY INTELLIGENCE COHORT

EXECUTIVE SUMMARY

Q3 2024

ENGLISH LANGUAGE STUDENTS IN THE UK EACH QUARTER

ENGLISH UK

BONARD

STUDENT STATISTICS REPORT Q3 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 Q3 2024, QUIC participants increased by one compared to Q3 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

Q3 2024 AT A GLANCE

Table 1
QUIC region summary

Region	No. of returns	Proportion of returns	Total weeks	Market share
		%	Σ	%
South and South Eastern England	64	28.7	80,344	27.0
London	59	26.5	89,568	30.1
South West England and the Channel Islands	29	13.0	36,348	12.2
Northern England	28	12.6	45,285	15.2
Eastern England	23	10.3	30,363	10.2
Central England and Wales	15	6.7	10,459	3.5
Scotland and Northern Ireland	5	2.2	5,498	1.8
Total	**223**	**100.0**	**297,865**	**100.0**

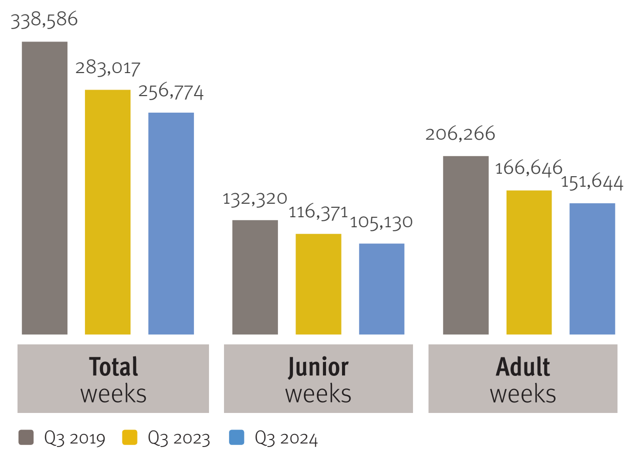
n=126 participating English UK members in Q3 2024
Note: The number of participating teaching centre locations in Q3 2024 is 244. This number differs per quarter and depends on when seasonal teaching centre locations are operational.
Note: Figures of student weeks per region were rounded and may not add 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 244 teaching centre locations in Q3 2024.

Of these, 223 were operational during this period, reflecting a 9% increase compared to Q3 2023. Collectively, they registered 297,865 student weeks, the strongest quarter in 2024.

Chart 1

Like-to-like comparison of student weeks by quarter



In a like-for-like comparison, reporting centres experienced an overall decline of 9% in student weeks from Q3 2023 to Q3 2024. Junior student weeks decreased by -11,241 student weeks (-10%), while adult student weeks declined by -15,002 student weeks (-9%).

Table 2

Year-on-year change in student weeks

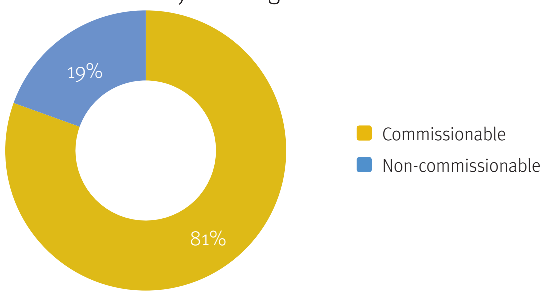
	Total weeks	Junior weeks	Adult weeks
Q3 2019 vs Q3 2024	-24%	-21%	-26%
Q3 2023 vs Q3 2024	-9%	-10%	-9%

Note: The figures in Chart 1 and Table 2 are based on data from centres reporting in all respective quarters (n=106 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).

When comparing Q3 2024 to Q3 2019, the volume of student weeks reached 75% of its 2019 level, with adult weeks recovering to 74% and junior weeks to 79% of their respective 2019 volumes. The recovery rate this quarter was lower than in Q1 and Q2 2024, when the sector reached 81% of 2019 volumes in both quarters.

Chart 2

Student weeks by booking source

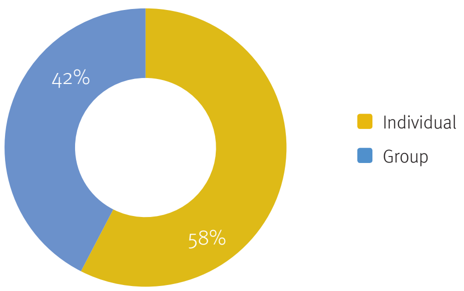


n=126 member centres participating in Q3 2024

Traditionally, the third quarter shows a slightly higher proportion of commissionable student weeks (81% of total weeks). Among the most significant increases in commissionable weeks were Turkey and Saudi Arabia.

Chart 3

Student weeks by booking type



n=126 member centres participating in Q3 2024

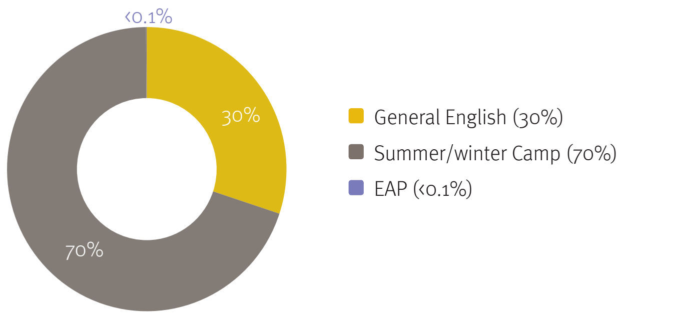
In Q3 2024, individual bookings accounted for 58% and group bookings for 42%, a ratio that has remained stable over recent years. When comparing Q3 2023 to Q3 2024, Saudi Arabia and Turkey also led in individual booking growth. For group bookings, China showed the largest increase.

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

GENERAL OVERVIEW

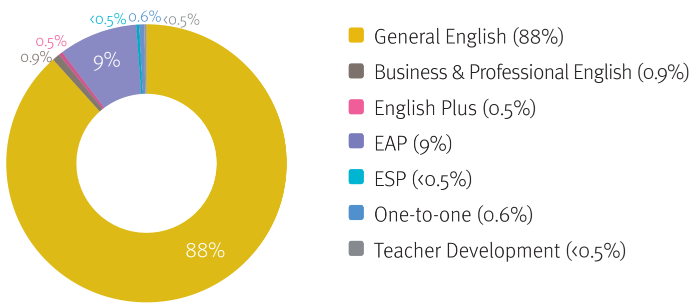
Q3 2024 AT A GLANCE

Chart 4
Student weeks by junior course types



n=126 member centres participating in Q3 2024

Chart 5
Student weeks by adult course types



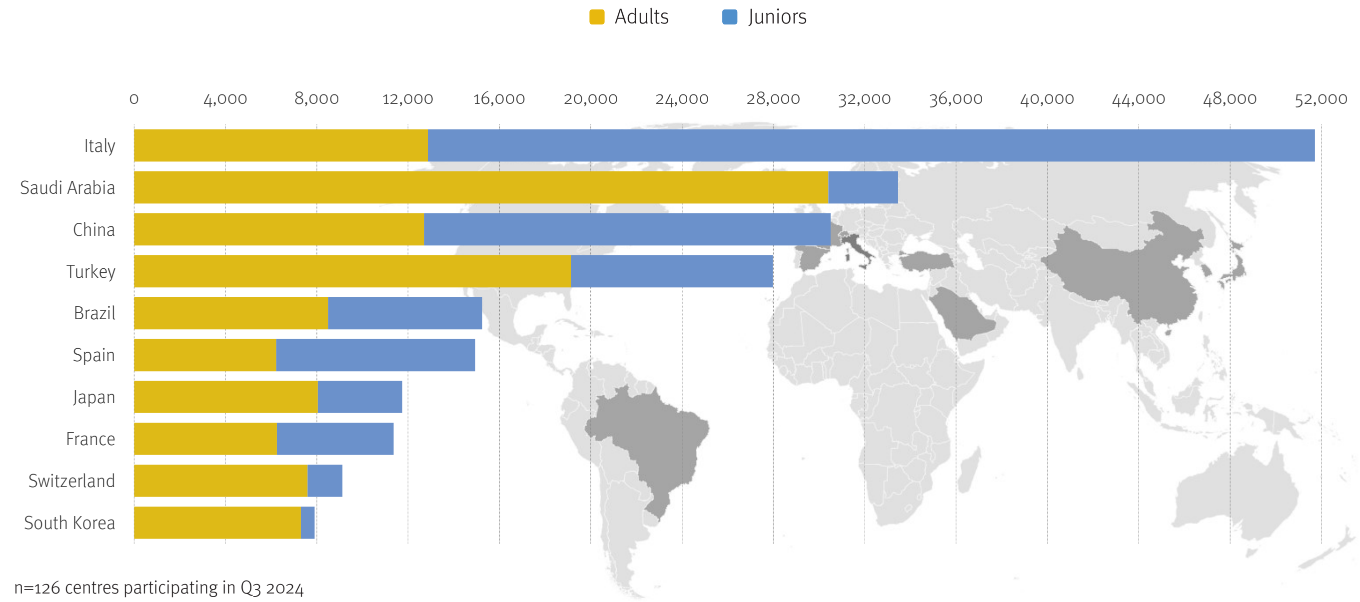
n=126 member centres participating in Q3 2024

The third quarter consistently displays unique features that set it apart from other quarters. With the rise in junior student weeks in Q3, General English was no longer the most popular course type, overtaken by Summer/Winter Camps, which accounted for 70% of total junior student weeks.

For adults, General English courses remained the most popular, comprising 88% of all adult student weeks in Q3 2024. In this quarter, the trend differed from Q3 2023, as English for Academic Purposes saw the largest decline, mainly due to drop in student weeks from Chine for this course type.

Chart 6

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



n=126 centres participating in Q3 2024

In Q3 2024, the top 10 source countries accounted for 72% of total student weeks. These markets contributed to 72% of the student weeks for adults and 71% for juniors.

Despite recording the largest decline among all source markets between Q3 2023 and Q3 2024 (-7,611 student weeks), Italy surpassed Saudi Arabia in the rankings.

China saw a slight decline of 432 between Q3 2023 and Q3 2024. The market's growth was tempered by a substantial drop in adult student weeks (-5,222), partially offset by an increase in junior student weeks (+4,791).

Turkey, ranking 4th, recorded the largest absolute increase in student weeks, adding +3,282 between Q3 2023 and Q3 2024.

ENGLISH UK

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