QUIC
QUARTERLY INTELLIGENCE COHORT

Executive summary

2020

Including Q1 – Q4 overview

ENGLISH UK

englishuk.com/quic

QUARTERLY INTELLIGENCE COHORT

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2020 Summary
Introduction

Market research is a fundamental tool for measuring the impact of Covid-19 and benchmarking the road to recovery in the future.

English UK, committed to supporting its members, is therefore continuing with a modified version of the optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC). The 2020 report, of which this is the executive summary, reflects the devastating impact of Covid-19 and focuses on tracking key indicators across the quarters. The integrity of future reporting was protected by collecting the full data set from 136 participating English UK members. The cohort represents 38% of the overall membership. The market intelligence contained will provide a baseline to monitor and understand the pattern of recovery for the sector in 2021 and beyond.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm, UNWTO Affiliate Member and member of ESOMAR World Research. Two-tiered data validation and reporting to international research standards means that the market intelligence remains exact, precise and reliable.

To reflect the diverse nature of the UK English language teaching (ELT), data was gathered from year-round and seasonal centres, as well as Higher Education (HE) and Further Education (FE) colleges in both the private and state sector.

The 2020 summary report features both quarterly overviews and annualised results, focusing on breakdowns by nationality, age and region. In addition, it uses information sourced from an online member survey which examined the impact of the Covid-19 pandemic on teaching delivery in each quarter of 2020.

Enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort. For 2020, these accompanying pivot tables cover each individual quarter as well as the cumulative year, supplied to participants in a user-friendly way to offer them more granular intelligence and benchmarks tailored to their organisation.

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.

2020 Summary Overview

Table 1

QUIC 2020 region summary – operational teaching centre locations by quarter

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	Overall No. of returns	Overall Proportion of returns
		%		%		%		%		%
South and South Eastern England	28	24.3%	22	25.6%	20	21.3%	20	21.7%	90	23.3%
London	25	21.7%	19	22.1%	22	23.4%	23	25.0%	89	23.0%
Northern England	24	20.9%	19	22.1%	22	23.4%	21	22.8%	86	22.2%
South West England and The Channel Islands	17	14.8%	12	14.0%	14	14.9%	13	14.1%	56	14.5%
Eastern England	13	11.3%	7	8.1%	9	9.6%	8	8.7%	37	9.6%
Central England and Wales	4	3.5%	4	4.7%	4	4.3%	4	4.3%	16	4.1%
Scotland and Northern Ireland	4	3.5%	3	3.5%	3	3.2%	3	3.3%	13	3.4%
Total	**115**	**100%**	**86**	**100%**	**94**	**100%**	**92**	**100%**	**387**	**100%**

Note: The number of participating teaching centre locations differs per quarter and depends on when teaching centre locations are operational.
Note: Percentages do not add up to 100% due to rounding.

In 2020, 136 English UK member centres signed up for the QUIC scheme. However, due to the impact of the Covid-19 pandemic, 19 of these (mainly seasonal multi-centre accreditations) did not open at any point in the year. Whilst the 136 members represented 273 teaching centre locations, the number of operational locations across the individual quarters varied from 86 to 115.

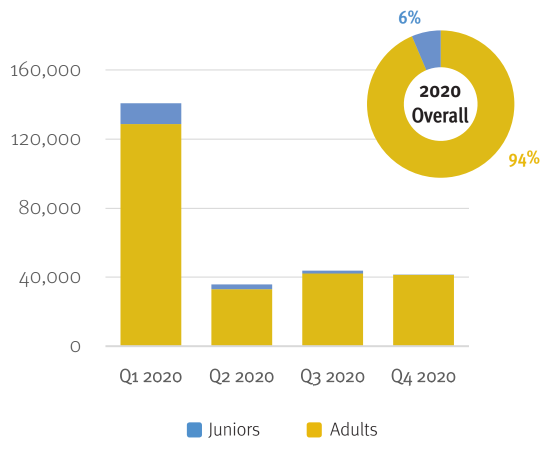
Member centres declaring data for 2020 registered a total of 261,843 student weeks. The ratio of adult to junior student weeks averaged out at 94% to 6% (245,124 adult student weeks to 16,719 junior student weeks). In comparison, in 2019, every fourth student week was booked by a junior student.

While the proportion of junior student weeks in Q1 2020 stood at 9%, in Q3, usually the peak season for juniors, it represented 3.8%.

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

Chart 1

Student weeks by quarter and age group



Note: The figures in Chart 1 relate to data from centres reporting in all four quarters of 2020 (n=136 centres).

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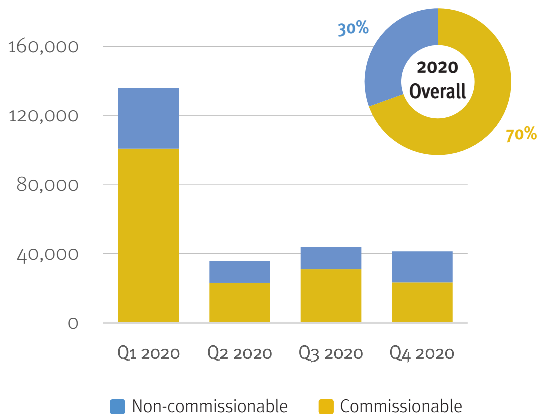
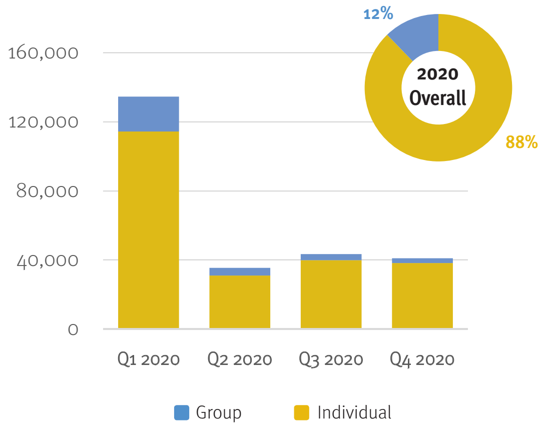
Chart 2
Student weeks by quarter and booking source



Of all the student weeks reported in 2020, 70% were booked via a commissionable source. This share shifted from 74% in the first quarter to 57% in the last.

Chart 3
Student weeks by quarter and booking type

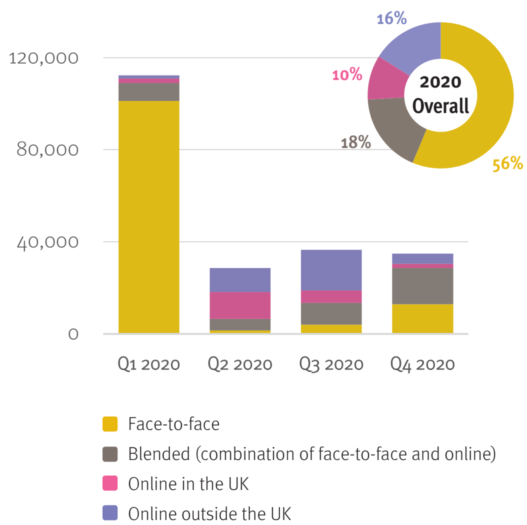


Note: The figures in Charts 2 and 3 relate to data from different samples in each quarter, depending on the ability of centres to provide data on booking source and type. The sample varied from n=130 centres to n=136 centres.
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

In line with the downward trend in the number of junior student weeks, the percentage of group enrolments declined from 15% in Q1 2020 to 7% in Q4 2020. On average, group enrolments accounted for one in eight student weeks.

In Q1 2020, the majority of student weeks were delivered face-to-face. In 10% of cases, teaching switched to online or blended courses due to the Covid-19 pandemic. Almost eight of ten student weeks moved online by Q2 2020, either within (41%) or outside (37%) the UK, while by Q3 2020, 49% of all student weeks were already being delivered as online classes for students off-shore. In the final quarter of the year, blended courses were the most usual mode of delivery (45% student weeks) while 37% of student weeks were taught as face-to-face lessons.

Chart 4
Student weeks by quarter and instruction type



Note: The figures in Chart 4 present a weighted average based on instruction type estimates reported by 113 centres and their student weeks in each quarter. Centres reported only on student weeks that had originally been booked as face-to-face courses but due to Covid-19 had to be switched to a different mode of teaching delivery, either during the course itself or prior to course commencement.

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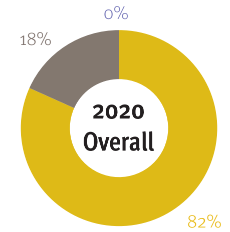
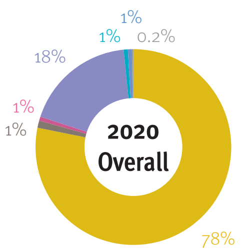
Chart 5
Student weeks by quarter and junior course types



Period	General English	Summer/ Winter Camp	EAP
Q1 2020	87%	13%	0%
Q2 2020	61%	39%	0%
Q3 2020	80%	20%	0%
Q4 2020	97%	3%	0%

Chart 6
Student weeks by quarter and adult course types



Period	General English	Business & Prof. English	English Plus	EAP	ESP	One-to-One	Teacher Development
Q1 2020	86%	2%	1%	10%	1%	1%	0.3%
Q2 2020	79%	1%	1%	18%	0.4%	0.5%	0.2%
Q3 2020	48%	1%	0.4%	50%	0.5%	1%	0.1%
Q4 2020	85%	1%	1%	12%	1%	1%	0.1%

Note: The figures in Charts 5 and 6 relate to data from centres reporting in all four quarters of 2020 (n=136 centres).
Note: Percentages do not add up to 100% due to rounding.

The most popular junior course type in all quarters of 2020 was General English, accounting on average for 82% of student weeks. Summer camp courses attracted an 18% market share, with demand peaking in Q2 2020 (39% of student weeks). This is a noticeable shift from pre-pandemic years when summer camps traditionally dominated in the third quarter. There were no bookings for English for Academic Purposes (EAP) courses for juniors.

General English was also most in demand among adult students in 2020 (78% of student weeks). In Q3, the lead was taken by EAP courses (50% of student weeks) due to the large number of adult students attending this type of course at a single member institution in this particular quarter. Consequently, General English did not dominate across all quarters in 2020.

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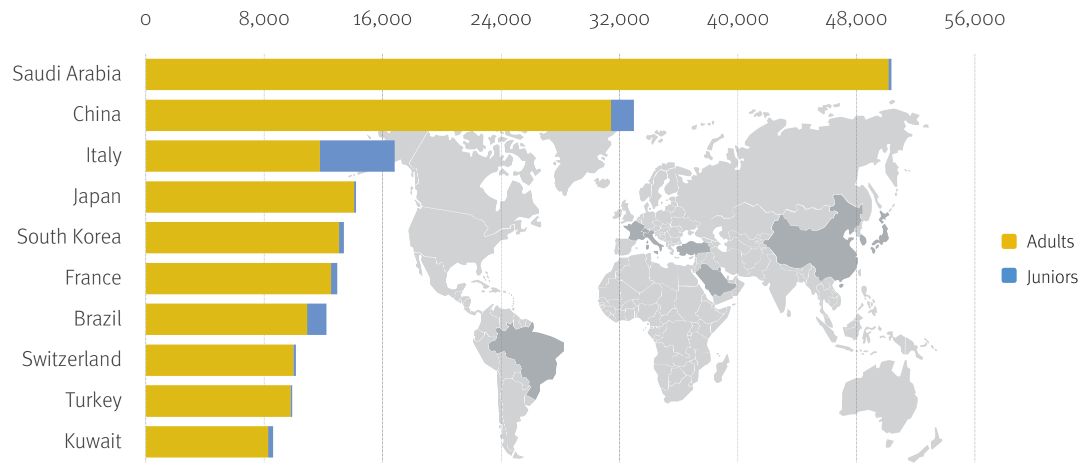
Chart 7

Student weeks by age group and source country (top 20 markets) in 2020



Note: The figures in Chart 7 relate to data from centres reporting in all four quarters of 2020 (n=136 centres).

With a 19% market share and 50,368 student weeks, Saudi Arabia was the leading source country in 2020. As is traditional for this nationality, over 99% of these weeks were produced by adult students. The second most represented source was China, with 32,980 student weeks in total.

The most significant contributor of junior student weeks, accounting for over 30%, was Italy (5,055).

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