QUIC

QUARTERLY INTELLIGENCE COHORT

ENGLISH UK

# Executive summary

# Q3 2022

ENGLISH UK

englishuk.com/quic

Prepared on behalf of:

English UK
47 Brunswick Court, Tanner Street, London SE1 3LH, UK | +44 20 7608 7960
www.englishuk.com | info@englishuk.com

Prepared by:

BONARD
Salztorgasse 2, 1010 Vienna, Austria | +43 650 612 4527
www.bonard.com | data@bonard.com

## Q3 2022

# Introduction

Market insight is crucial for business success, and English UK is committed to supporting members by providing better and faster information.

As in the pre-pandemic years, our optional student statistics scheme, the Quarterly Intelligence Cohort (QUIC), continues on a quarterly basis. It introduces features not available in our annual student statistics reports and this is the executive summary of the third report in the 2022 series.

QUIC provides an in-depth analysis of the UK English language teaching (ELT) industry's source markets. Whilst the executive summaries are made publicly available, the full reports are exclusive to QUIC members, who can use them to benchmark their performance and monitor market trends.

Added value has been maintained by outsourcing the data processing and subsequent analysis to BONARD, an independent market research firm 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.

Members can be confident in the robustness of this quarter three (Q3) report and its value in helping them make well-informed, time-critical business decisions just weeks after the quarter's end.

In Q3 2022, the cohort of QUIC scheme participants remained the same as in Q2, thus 120 member centres. The current sample now represents 36% of the overall English UK member base. 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.

Having collected the full data set from participating members in 2021, it was possible to return to featuring a historical comparative analysis not only of overall figures but also by various breakdowns.

The enhanced sectoral, regional and provider-type breakdowns are shared only with the QUIC cohort in the form of the accompanying pivot tables. These are supplied to members in a user-friendly way to offer them more granular intelligence and benchmarks tailored to their organisation.

For more information on QUIC, please visit
www.englishuk.com/quic
or 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.

# Q3 2022
# Overview

**Table 1**
QUIC region summary

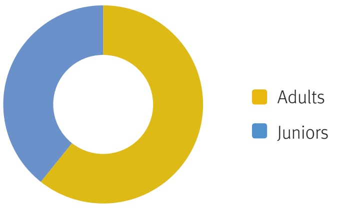
| Region | **No.** of returns | **Proportion** of returns | **Total** weeks | **Market** share |
|---|---|---|---|---|
| | | % | Σ | % |
| South and South Eastern England | 55 | 30.2% | 53,351 | 26.1% |
| London | 42 | 23.1% | 55,545 | 27.1% |
| Northern England | 25 | 13.7% | 39,155 | 19.1% |
| South West England and The Channel Islands | 22 | 12.1% | 22,765 | 11.1% |
| Eastern England | 21 | 11.5% | 24,761 | 12.1% |
| Central England and Wales | 12 | 6.6% | 5,890 | 2.9% |
| Scotland and Northern Ireland | 5 | 2.7% | 3,288 | 1.6% |
| **Total** | **182** | **100.0%** | **204,755** | **100.0%** |

**Note:** The number of participating member centre locations in Q3 2022 is 182. This number differs per quarter and depends on when teaching centre locations are operational.
**Note:** Figures of student weeks per region were rounded and do 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.

# Q3 2022
# Overview

A total of 120 English UK member centres registered for the QUIC scheme in Q3 2022, representing 235 teaching centre locations. This quarter 182 teaching centre locations were operational and recorded a total of 204,755 student weeks.

### Chart 1
Student weeks by age group



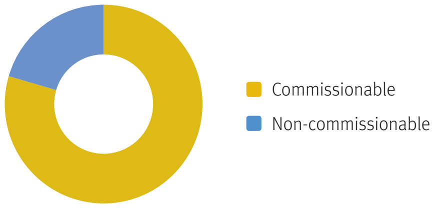

In Q3 2022, adult student weeks made up 61% (124,342) of the total, with junior student weeks making up the remaining 39% (80,413), in a similar ratio to Q3 2019 (60% to 40% split). By comparison, the 2021 picture looked very different: in Q3 2021, adult student weeks made up 96% of the total. Student weeks in Q3 2022 registered a 237% increase from over the same period in 2021. The junior segment grew by 78,016 student weeks in a year, and adults followed with an increase of 65,997 weeks compared to Q3 2021.

| Period | **Total** weeks | **Junior** weeks | % | **Adult** weeks | % |
|---|---|---|---|---|---|
| **Q3 2021** | 60,738 | 2,397 | 4% | 58,340 | 96% |
| **Q3 2022** | 204,751 | 80,413 | 39% | 124,338 | 61% |
| **Change** | +237.1% | +3,254.1% | | +113.1% | |

**Note:** The figures relate to a like-to-like comparison, which is based on data from centres reporting in both Q3 2021 and Q3 2022 (n=119 centres).

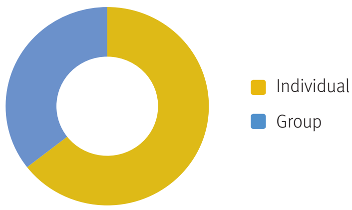
**Note:** Any students under the age of 18 who are studying on courses for adults should be recorded as 'adult' (the course type overrides the date of birth of the student).

### Chart 2
Student weeks by booking source




In Q3 2022, four in five student weeks were commissionable, reaching pre-pandemic standard.

### Chart 3
Student weeks by booking type




In Q3 2022, group bookings accounted for 36% of the total student weeks, an almost three times a larger proportion than in 2021 (13%).

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

# Q3 2022
# Overview

**Chart 4**
Student weeks by junior course types

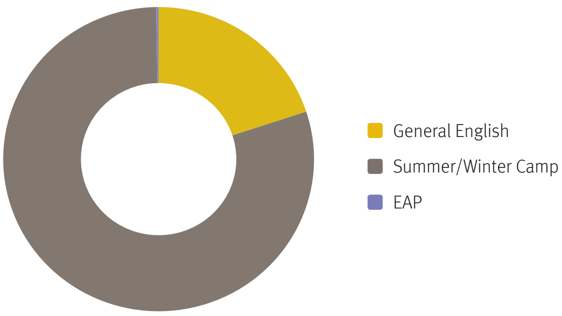
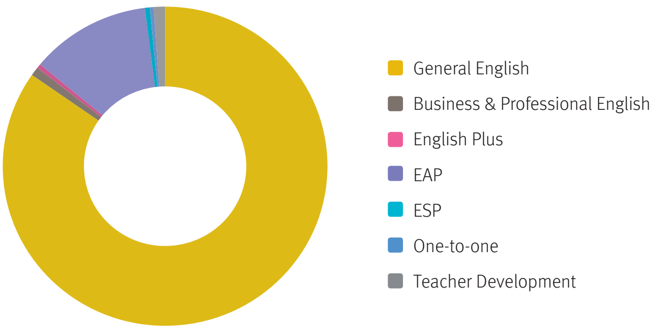



**Chart 5**
Student weeks by adult course types



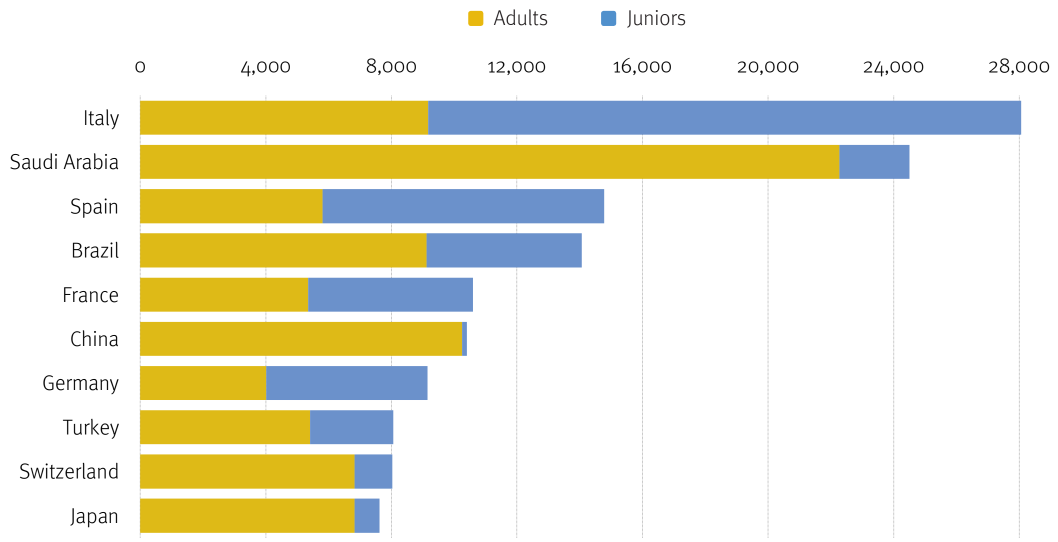

Student weeks boomed for both General English and Summer/Winter Camp for juniors between Q3 2021 and Q3 2022. General English student weeks jumped from 656 in Q3 2021 to 16,069 in Q3 2022, while Summer/Winter Camp courses went from 1,653 student weeks in Q3 2021 to 64,307 in Q3 2022, attracting 80% of all junior weeks.

Student weeks for all types of adult courses grew between Q3 2021 and Q3 2022. General English was still the most popular course type, registering 105,308 student weeks – 140% more than in the same period in 2021. Student weeks for the second most popular course type, EAP, grew by 9%, reaching 14,927 in Q3 2022.

# Q3 2022
# Overview

**Chart 6**

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




In Q3 2022, the top 10 markets represented 68% of all student weeks.

Italy was the top source market in Q3 2022, with a total of 32,894 student weeks, showing the most impressive growth in number of student weeks: 29,721 more than in Q3 2021.

Saudi Arabia, the strongest adult market, took the overall second position, with 24,507 weeks (+12,873 compared to Q3 2021). Spain was in third position with 14,771 student weeks (+12,891).

China, was the second-largest source market by total student weeks in Q3 2019, but it dropped to 6th place in Q3 2022.

# Q3 2022
# Overview

**Table 2**
Top 10 source markets (2019) and their recovery levels

| Rank | Source country | Q3 2022 student weeks volume as a % of Q3 2019 volume |
|---|---|---|
| 1 | Italy | 49% |
| 2 | China | 18% |
| 3 | Saudi Arabia | 61% |
| 4 | Spain | 64% |
| 5 | Russia | 4% |
| 6 | Turkey | 47% |
| 7 | France | 72% |
| 8 | Japan | 53% |
| 9 | Brazil | 103% |
| 10 | Switzerland | 63% |

100% recovery level

**Note:** There was fluctuation in the number of reporting centres in Q3 2019 and Q3 2021. The analysis of recovery levels is based on data from 132 reporting centres in Q3 2019 and 120 reporting centres in Q3 2022.

Traditionally strong source countries in Western Europe, such as Italy, Spain and France, are well on track to rebuild their pre-pandemic volume (with a 49%, 64%, and 72% recovery levels respectively).

Out of the top 10 source markets (2019), Brazil already exceeded pre-pandemic volumes (103%).

On the other hand, China and Russia buck the recovery trend, experiencing low rebound (with 18% and 4% recovery levels respectively).

QUARTERLY
INTELLIGENCE
COHORT

ENGLISH UK

ENGLISH UK

englishuk.com/quic