QUIC

QUARTERLY
INTELLIGENCE
COHORT

Online Market for UK ELT

2021

ENGLISH UK

englishuk.com/quic

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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

Online Market for UK ELT
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Introduction

English UK, the national association for English language teaching (ELT) centres, offers its members a comprehensive quarterly intelligence: the QUIC scheme.

To provide brand-new intelligence on the use and volume of online language courses, English UK commissioned a supplementary survey of QUIC members which addresses the future of the online market. Even before 2020, rapid development was seen in the online market for English language learning due to economic globalisation as well as the adoption of more cost-efficient technology products.

This report represents the first systematic effort to document the online language course offering, which could inform further strategies for English UK providers. The data collected provides insight on how much this type of product has been developed as a result of the pandemic and what part of the offer is standalone.

A standalone English online language course is defined as one which, regardless of Covid-19, would have been marketed as delivered online rather than offered as 'Emergency Remote Teaching', which is a temporary alternative to face-to-face.

The supplementary online survey showed that 89% of the responding QUIC members provided some form of English language teaching online in 2021. Of these centres, 75% did so to provide an alternative form of tuition due to Covid-19 restrictions, i.e., 'Emergency Remote Teaching'. At the same time, 67% of members developed a standalone online ELT course in response to Covid-19, whereas 8% were already marketing a standalone online ELT course before the pandemic.

This survey was conducted by BONARD, English UK's insight partner and an independent market research provider specialising in international education. BONARD is a UNWTO Affiliate Member, with senior research officials also being members of ESOMAR World Research.

Online Market for UK ELT
Methodology

The results are based on an online survey distributed among English UK member centres, the QUIC scheme participants. A total of 100 centres provided their data, which constituted 81% of the 2021 QUIC sample.

Data collection took place in January and February 2022.

The study was conducted in compliance with the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics. No individualised data was shared with any third party, including English UK.

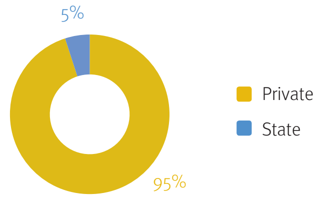
Acknowledgements

We would like to extend our gratitude to all English UK member centres who contributed to this survey by submitting their data. This initiative would not have been possible without their timely support.

The BONARD Team

Chart 1

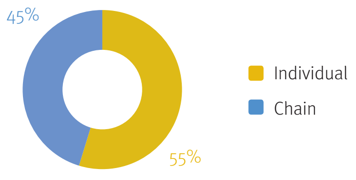
Respondents by provider type



n=100

Chart 2

Private sector respondents by provider status

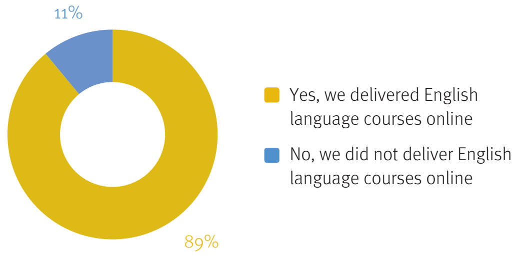


n=100

Note: A chain consists of least two year-round centres in two different locations with centralised ownership and marketing.

Online Market for UK ELT
Overview

Chart 3
Centres by delivery of ELT courses online in 2021

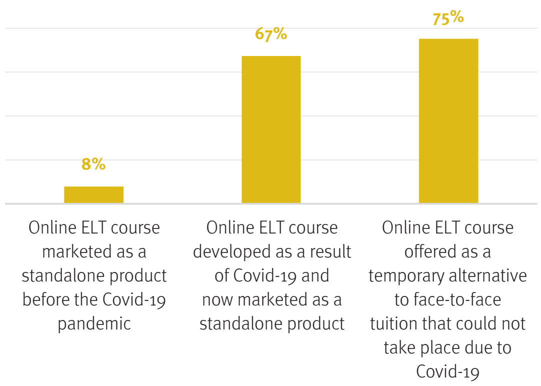


n=100

Note: Chart 3 relates to any standalone online courses (i.e., those that would have been delivered online regardless of Covid-19) as well as online courses delivered as an alternative form of tuition due to Covid-19 restrictions, i.e. 'Emergency Remote Teaching'.

Note: The usual 'student week' minimum was disregarded. All online tuition, irrespective of whether it was 10 or more hours per week was included.

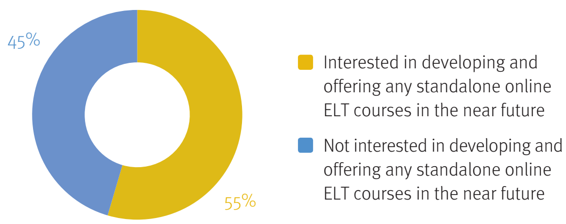
Chart 4
Approaches delivered at centres which offered ELT courses online in 2021



n=89
Note: Multiple choice question

In 2021, 89% of surveyed centres offered online English language courses. Three quarters of these reacted to the ongoing pandemic by developing online courses as a temporary alternative to face-to-face classes due to the Covid-19 restrictions in place. At the same time, 67% of centres were marketing online ELT courses developed as a result of Covid-19 as a standalone product to meet demand until mobility fully resumes.

Chart 5
Centres which did not offer ELT courses online in 2021 and their interest in developing one in the future

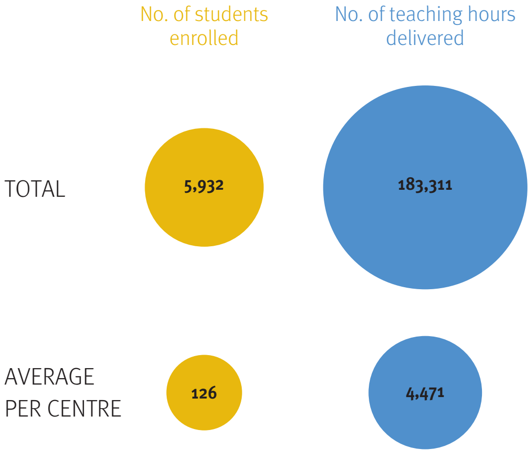


n=11

The online ELT market will continue to develop: 55% of centres that did not offer digital courses in 2021 are considering developing them as standalone course options for customers. Standalone online English language courses remain a revenue-generating opportunity.

Standalone Online Products
Volume and Type of Learning

Chart 6
Volume of standalone online ELT tuition in 2021



n=47; n=41

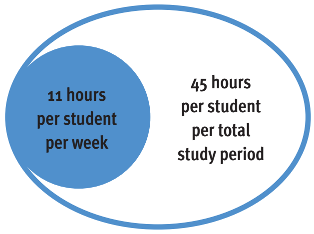
The surveyed centres reported that a total of 5,932 students enrolled in standalone online courses in 2021. In absolute numbers, these students attended lessons for a total of 183,311 teaching hours.

An average of 51 more students enrolled in online standalone programmes in English UK individual centres than in centres that belong to a chain (152 students and 101 students, respectively). Reflecting the high average number of students enrolled, individual providers delivered 5,448 teaching hours per centre, which is well above the overall average.

As a comparison, an average of 251 students enrolled in face-to-face tuition per centre in 2020 (most recent available data).

A closer look at teaching hours indicates that students spent an average of 11 hours on standalone ELT courses per week at responding centres. For the total study period, students studied an average of 45 hours' tuition.

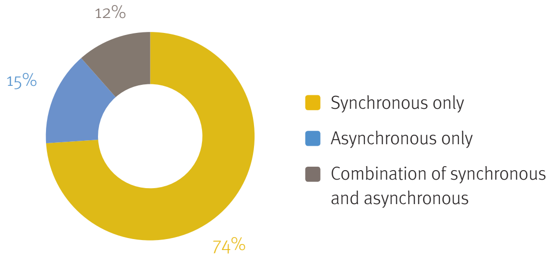
Chart 7
Average number of hours delivered online per student in 2021



n=44; n=41

Note: The average number of hours delivered online per student per total study period does not match the ratio of teaching hours delivered and students enrolled, due to variation in sample sizes in the respective survey questions. Additionally, some respondents provided estimates of this value.

Chart 8
Student enrolments in standalone online ELT courses in 2021 by type of learning



n=40
Note: Percentages do not add up to 100% due to rounding.

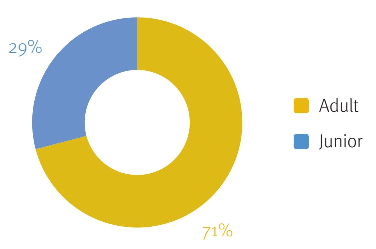
In 2021, 74% of all students opting for standalone online courses attended synchronous only courses. The share of students attending asynchronous only courses was higher at chain providers, where it stood at 19% (in comparison with 8% at individual providers).

Standalone Online Products

Age and Programme Types

Chart 9

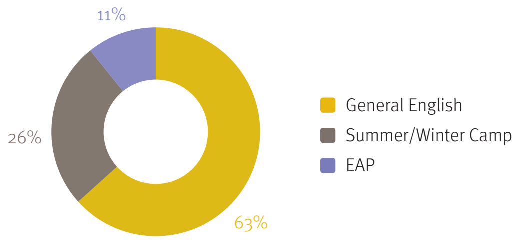
Student enrolments in standalone online ELT courses in 2021 by age



n=48

Chart 10

Student enrolments in standalone online ELT courses in 2021 by junior programme type



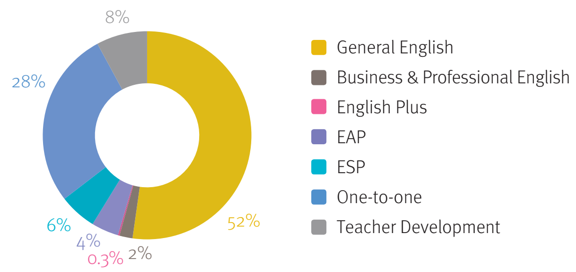
n=38

Standalone online ELT courses were predominantly attended by adults, who accounted for 71% of student enrolments. General English was the strongest of the standalone online ELT product types in 2021, with a 52% share of enrolments. The second strongest programme was one-to-one classes, which accounted for 28% of adult enrolments. By comparison, one-to-one programmes represented 0.3% of adult student weeks delivered face-to-face in 2021.

The junior segment was slightly stronger in individual centres, where its share reached 33%, a figure slightly above the overall average. General English was also the most popular course among juniors, accounting for 63% of all junior enrolments, followed by Summer/Winter Camps, with 26%, and EAP, with 11%. Junior students took more General English classes at chain centres (79%) but more Summer/Winter Camps with individual providers (31%).

Chart 11

Student enrolments in standalone online ELT courses in 2021 by adult programme type



n=40

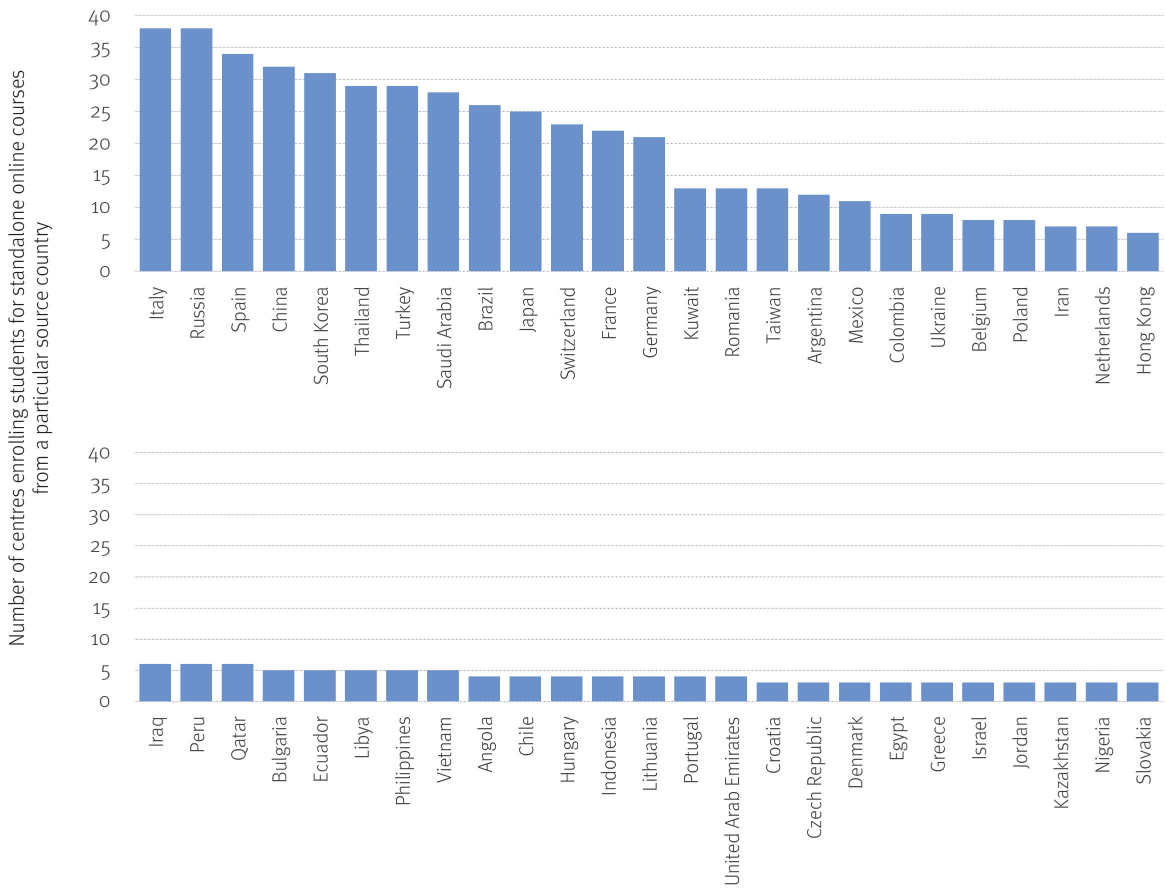
Note: Percentages do not add up to 100% due to rounding.

Standalone Online Products

Source Countries

Chart 12

Top 50 source countries (ranked by number of centres) for delivery of standalone online ELT courses in 2021



n=53

Note: Survey questions on number of centres enrolling students for standalone online courses from a particular source country and number of students from a particular source country were optional. Therefore, Chart 12 and Table 1 relate to different sample sizes.

The nationality mix for standalone online ELT courses differs from that of in-person English language courses. Chart 12 depicts nationalities ranked by number of centres enrolling students for standalone online courses from a particular source country. The top three source markets were Italy (72% of respondents), Russia (72%) and Spain (64%).

While Italy saw a significant drop in student weeks delivered face-to-face in 2021, it remained the most-represented country in terms of number of students enrolled in standalone online courses (Table 1), with 36 providers indicating a total of 730 Italian students. The market was followed by Saudi Arabia (542 students) and Russia (255 students).

Standalone Online Products
Source Countries

Table 1
Source countries ranked by number of students attending standalone online ELT courses in 2021

Rank	Source country	Total students	%	Rank	Source country	Total weeks	%
1	Italy	730	18%	27	Iran	12	0.3%
2	Saudi Arabia	542	13%	28	Poland	12	0.3%
3	Russia	255	6%	29	Angola	11	0.3%
4	South Korea	247	6%	30	Iraq	10	0.2%
5	France	243	6%	31	Hong Kong	7	0.2%
6	Brazil	207	5%	32	Bulgaria	6	0.1%
7	Thailand	190	5%	33	Qatar	6	0.1%
8	Mexico	135	3%	34	United Arab Emirates	5	0.1%
9	Netherlands	135	3%	35	Algeria	3	0.1%
10	Turkey	131	3%	36	Belgium	3	0.1%
11	Switzerland	127	3%	37	Chile	3	0.1%
12	China	117	3%	38	Ecuador	3	0.1%
13	Japan	116	3%	39	Greece	3	0.1%
14	Spain	101	2%	40	Israel	3	0.1%
15	Colombia	86	2%	41	Cyprus	2	< 0.1%
16	Germany	78	2%	42	Czech Republic	2	< 0.1%
17	Jordan	51	1%	43	Nigeria	2	< 0.1%
18	Kuwait	35	1%	44	Slovakia	2	< 0.1%
19	Taiwan	28	1%	45	Syria	2	< 0.1%
20	Peru	26	1%	46	Austria	1	< 0.1%
21	Panama	25	1%	47	Denmark	1	< 0.1%
22	Argentina	23	1%	48	Hungary	1	< 0.1%
23	Romania	19	0.5%	49	Kazakhstan	1	< 0.1%
24	Portugal	15	0.4%	50	Libya	1	< 0.1%
25	Vietnam	15	0.4%	51	Serbia	1	< 0.1%
26	Ukraine	13	0.3%		Other	302	7%
					Total	**4,095**	

n=36

Note: Survey questions on number of centres enrolling students for standalone online courses from a particular source country and number of students from a particular source country were optional. Therefore, Chart 12 and Table 1 relate to different sample sizes.

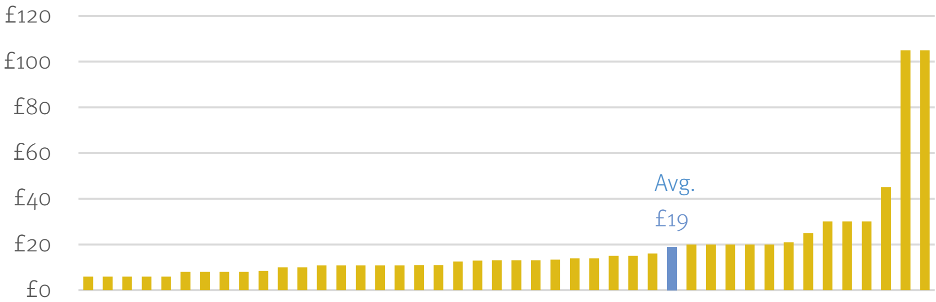
Standalone Online Products

Course Price

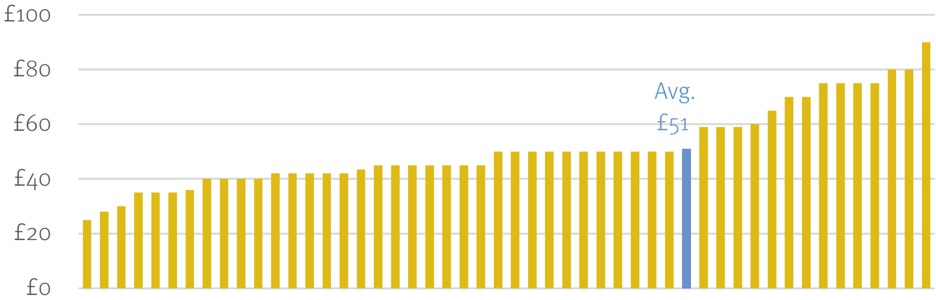
Chart 13

Average price for a standalone online ELT lesson in 2021 (45–60 minute) – all responding centres and average

GROUP LESSON



ONE-TO-ONE LESSON



n=43; n=49

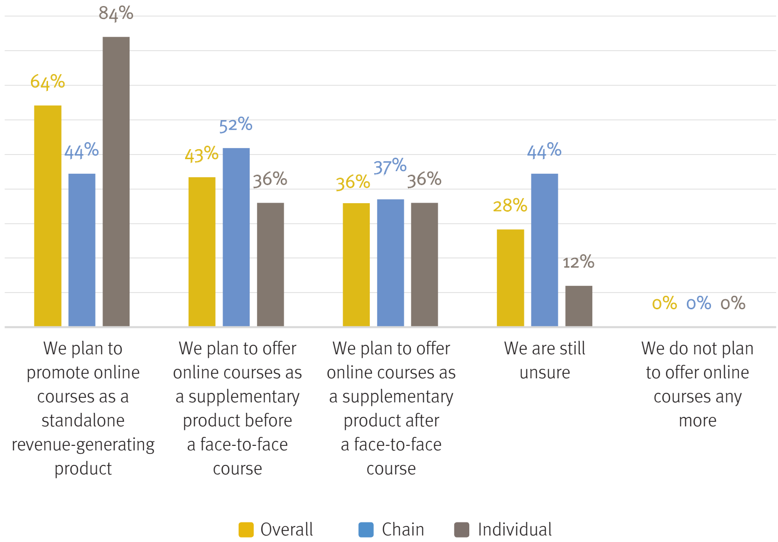
The average price for a standalone online 45–60-minute group lesson was £19. One-to-one online was more than twice as expensive, with an average price of £51.

Prices also varied depending on centre type. Chain centres offered group online lessons for £16, which was below the average. Individual centres charged £23 for a group lesson.

One-to-one online lessons were more expensive at chain schools (£53) than at individual providers (£47).

Standalone Online Products
Future Plans

Chart 14
Plans related to online ELT course delivery once student mobility fully resumes



n=53
Note: Multiple choice question

There is a consensus among the surveyed centres about the future: all plan to offer online courses once student mobility fully resumes, with 64% intending to promote such courses as a standalone product. This is especially true of individual centres, 84% of which see potential for online ELT courses. Chain providers opted for this in 44% of cases.

Another feasible option for respondents is to offer online courses as a supplementary product before (43%) or after (36%) a face-to-face course. Twenty-eight percent of centres are still unsure about their plans in regard to online ELT tuition in the future.

Additional comments from survey respondents pointed to some of the challenges related to online provision. Naturally, lack of geographical advantage as a selling point is one of them. Another reported area of concern is the preparedness of the current agent market, which, according to one respondent, is not suitable to offer online products. A further challenge relates to the availability of personnel, given the time differences and the high cost of providing staff from the UK.

Clearly, there is interest among participating centres in offering online ELT provision in one form or another in the future. Thus, this developing segment will continue to be measured in the years to come.

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