



Update on UK ELT from English UK

Roz McGill, English UK

ST Alphe Spain, January 2023

What we will cover

- UK ELT before and during the pandemic
- Tracking recovery, market dynamics and outlook
- English with Confidence campaign
- UK Quality Assurance Framework + British Council agent training
- StudyWorld spring + fam trips



UK ELT: before the pandemic

- The UK attracted **550,000 ELT students** annually
- Around half from Europe and in 2019 over half (54%) of those were juniors (under-18 years old)
- According to VisitBritain research – UK ELT students **spend twice as much** money in the UK and **stay three times as long** as other inbound travellers.



Impact of the pandemic

Data from our annual reports showed:

- 2020 saw 84% drop in UK ELT student numbers
- Impact on student numbers deepened in 2021
- 2019 v 2021 year-on-year UK decline worse than global ELT average
- 2019 v 2021: -88% student numbers, -71% student weeks
- 40 teaching premises permanently closed
- **BUT 85% of English UK member centres have survived**



Recovery in Q1 & Q2 2022

Data from our quarterly reports showed:

- **Q1 2022** (January – March):
172% increase in student weeks on Q1 2021 (~**55% recovery** on pre-pandemic volume).
- **Q2 2022** (April – June):
181% increase in student weeks on Q2 2021 (~**70% recovery** on pre-pandemic volume)
- But recovery continued at a **slower pace for the junior segment**
- The top ranked source markets largely reflected pre-Covid Q2 ones, with China and Russia the notable absences



Our latest statistics: Q3 2022

- Summer rebound seen for both adult and junior segments
- Juniors up a massive 3,254% compared with Q3 2021 (after having dwindled to almost nothing during the pandemic)
- Overall student weeks reached **55% of** the level seen in summer **2019**

| 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).



Q3 2022: top source markets

Top 5 junior source:

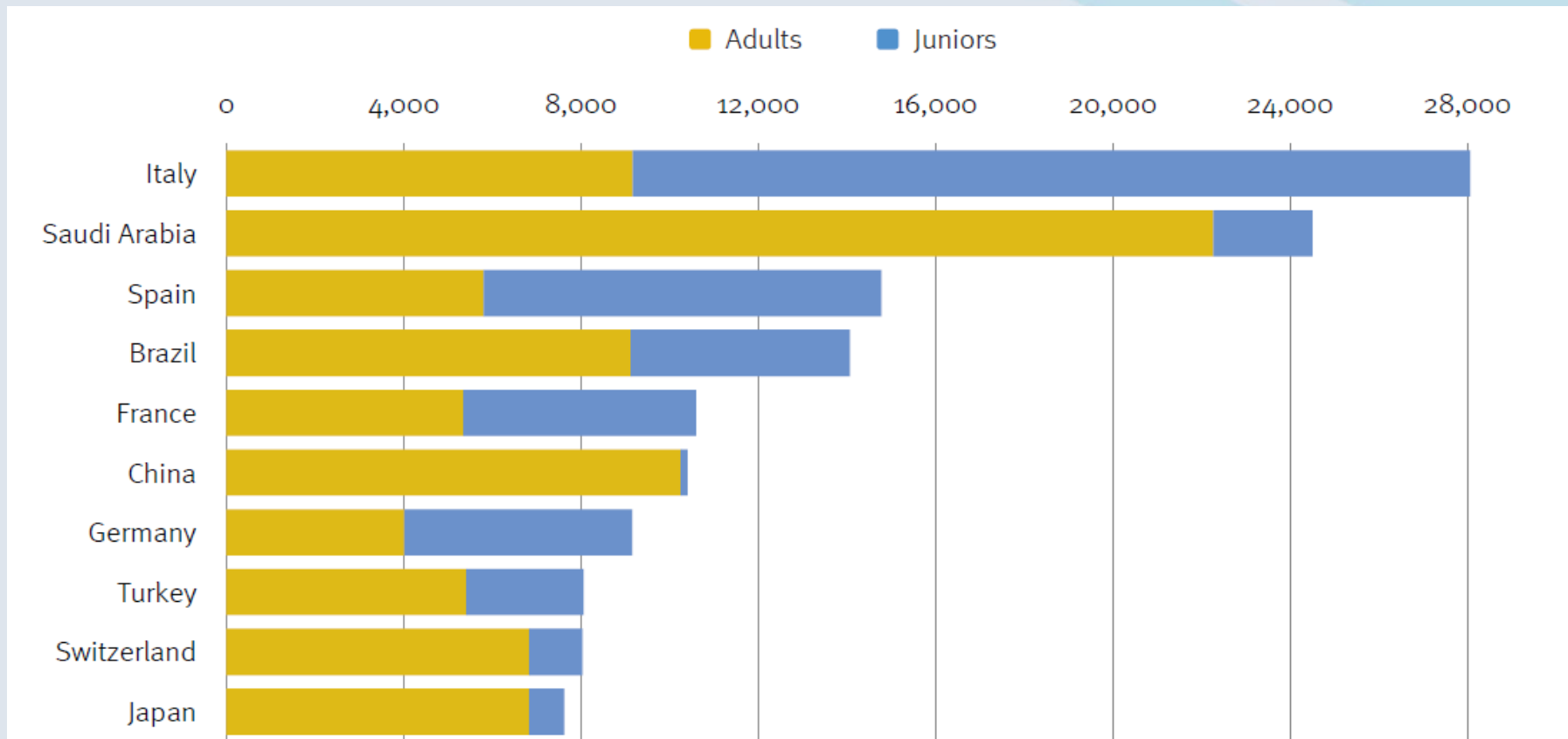
- Italy (29.5%), Spain (11.2%), France (6.5%) Germany (6.4%) & Brazil (6.1%)

Top 5 adult source markets:

- Saudi Arabia (17.9%), China (8.2%), Italy (7.4%), Brazil 7.3%) & Japan (5.5%)

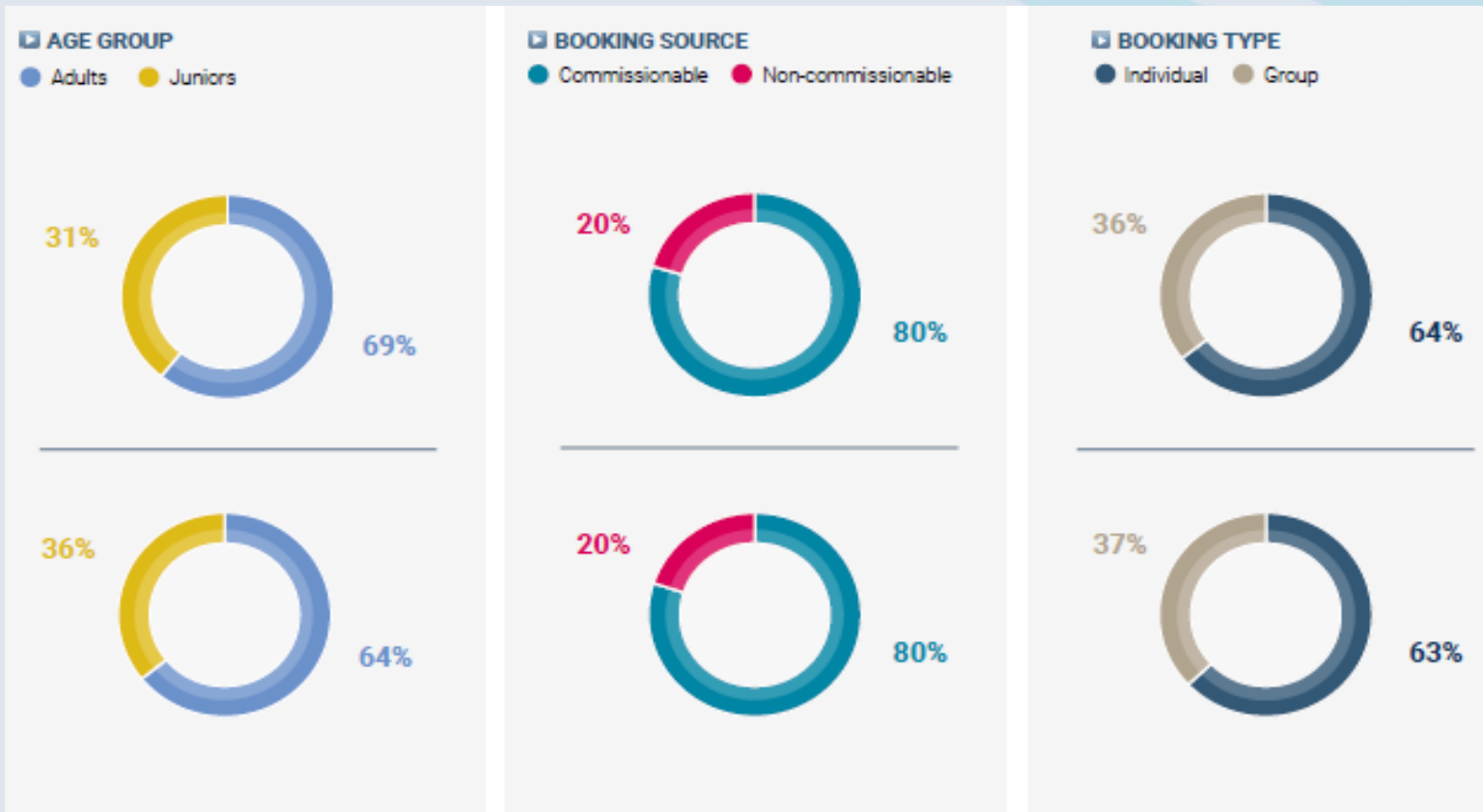


Q3 2022: overall top markets and student weeks (with age group breakdown)



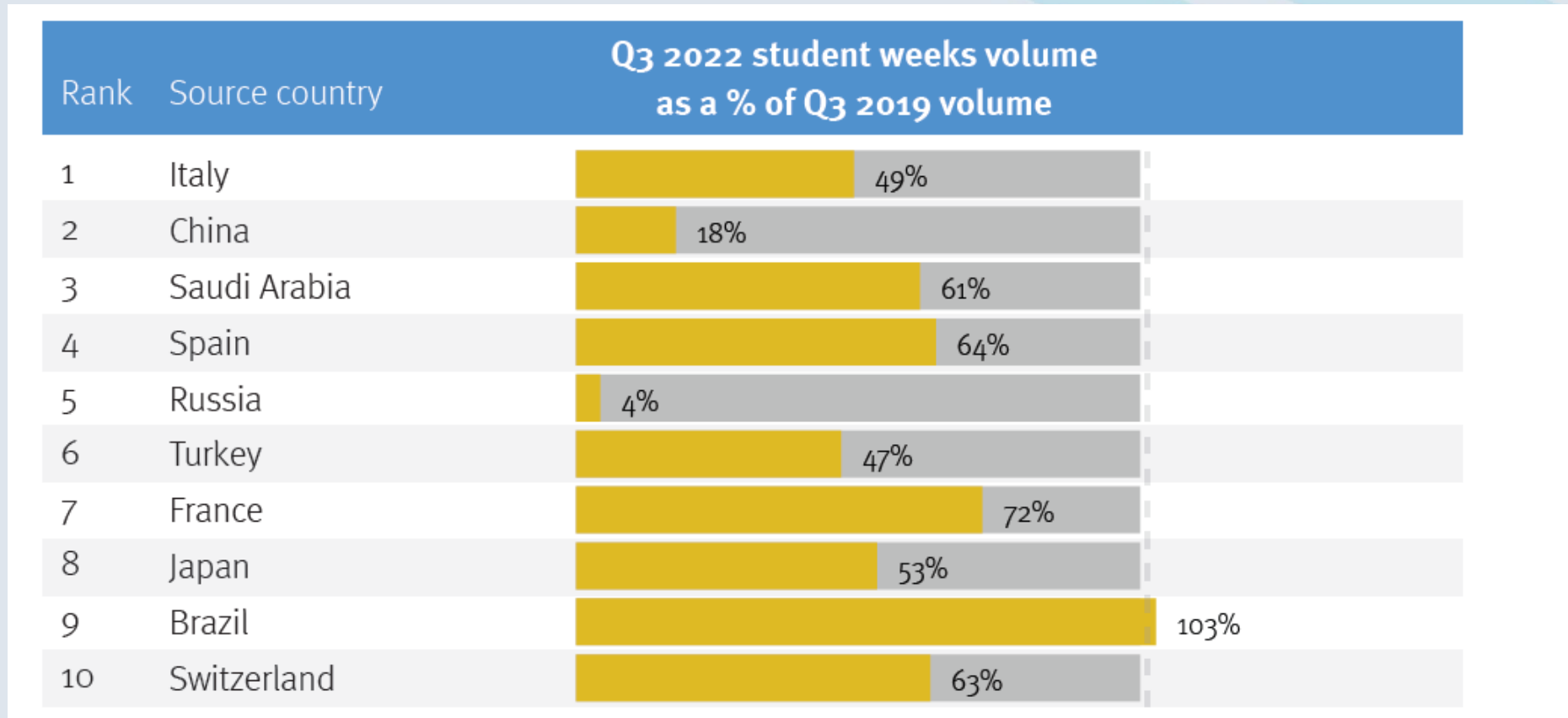
Q3 2022: market structure & dynamics similar to pre-pandemic levels

Q3 2022



Q3 2019

Q3 2022: top 10 markets (2019) and their recovery levels



Market dynamics and outlook

Recovery drivers

- UK position v competitor ELT destinations (rival MESDs)
- Pent-up demand
- Further easing of Covid-related restrictions in source markets (China)
- Visa free travel extensions (Saudi, Colombia, Peru)
- Demand for UK HE
- Blended/ online course delivery
- Relatively weak GBP

Barriers to recovery

- UK position v rival MESDs!
- Capacity shortages – staff and accommodation
- Impact of Brexit
- Government policies - eg. absence of work rights
- Flight availability
- Cost of living crisis



Why choose the UK?

Safe and supported

The UK is a world leader in caring for young learners. Students feel safe and supported while they learn.

Quality standards

British Council accreditation assures excellence in teaching, welfare, accommodation and facilities.

Easy visas

A simplified UK visa system means agents can advise students with confidence.

Covid safety

The Covid-19 vaccination rate in the UK is very high and there are no travel restrictions.



40 years of assuring excellence in UK ELT

English with Confidence campaign & website

Collaboration between English UK, British Council and the Department for International Trade run under the globally-recognised GREAT Britain brand.

Includes:

- Branded digital assets and images for sharing on social media channels
- Information website **study.englishuk.com** for study abroad agents – content includes visa information, student choices, Covid-19 information, agent resources and blog.



Great English

comes quicker when
you immerse yourself



Recent blog posts study.englishuk.com/blog



Students get ready for Christmas in the UK

14 December, 2022 | By English UK

As the UK's English language schools get into the festive spirit, international students are experiencing seasonal traditions, enjoying Christmas events around the UK and in some cases seeing snow for the first time! Let's see

[read more](#)



StudyWorld spring + fam trips | Agents are invited to London in March '23 to meet UK schools

3 November, 2022 | By English UK

Agents are invited to meet UK schools at StudyWorld spring Study abroad specialists from around the world are invited to attend StudyWorld spring - a B2B event that connects study travel agencies with UK institutions.

[read more](#)



Study travel agents visit schools across the UK

29 September, 2022 | By English UK

Fam trips celebrating 40 years of excellence in UK English language teaching 50 study abroad agents visited schools in the UK this month on fam trips organised by English UK members. The trips in early September were

[read more](#)



UK Quality Assurance Framework

britishcouncil.org/education/agents-counsellors/quality-assurance-framework

UK Quality Assurance Framework

An education sector wide initiative



- Jointly led by the British Council, BUILA, UKCISA and UUKI.
- Based on recommendations from **extensive research** with students, education providers, education advisers and agents.
- The framework is designed to **enhance** the **partnership** between the UK education sector and agents and counsellors and to recognise and **share best practice**.

The framework's seven tools

1. UK agent **engagement hub**
2. Agent **training**
3. National **code of ethical practice** for education agents
4. Good practice **guide for agents** partnering with UK provider
5. A **database** of certified agents and counsellors
6. The **student guide** to choosing an agent
7. Good practice **guide for providers** using agents

britishcouncil.org/education/agents-counsellors/database

Become a UK Certified Agent

www.britishcouncil.org/education/agents-counsellors



More accessible and affordable training

Redesigned course



Key changes:

- **Free** of charge (no cost barrier)
- 100% **online-** study anytime, anywhere
- Content grouped in **thematic** areas (not by study level)
- 8 modules that can be studied in **any order**
- **Fast-track** straight to assessment (for experienced agents)

britishcouncil.org/education/education-agents/training-agents

Course content

1. Why choose the UK
2. The UK education system
3. Preparing students for a UK education
4. Student experience
5. Values and ethics
6. Visas and immigration
7. Post-study options
8. Working with the British Council
9. Assessments



Become a 'Certified' agent

Pass all assessments + sign up to the 'Code of Ethical Practice' = listed on database

britishcouncil.org/education/agents-counsellors/database

UK agent and counsellor engagement hub

More unified communication and information sharing



📌 The national code of ethical practice for UK education agents

The national code of ethics is a key element of the UK education agent partner quality assurance framework...

Your progress: 0%



📌 UK agent and counsellor training and assessment

Welcome to the online training course for agents and counsellors. Whether you are an experienced counsellor,...

Your progress: 0%



Agent quality framework

The UK education agent partner quality assurance framework has been developed to provide a non-restrictiv...

Your progress: 0%



Marketing the UK: Study UK marketing resources

Study UK is a global campaign that promotes the UK as the first-choice study destination to international students...

Your progress: 0%



UK education organisations that support agents and counsellors

There is a wide range of organisations that work to ensure that the UK international education sector is one of the mo...



UK government organisations

There are many UK government organisations and departments which are influential in the...

Your progress: 0%

Upcoming English UK events: StudyWorld spring (in-person)

STUDY
WORLD

- Wednesday 8 – Friday 10 March 2023
- Hilton London Bankside Hotel
- Free attendance for agents, including two nights' accommodation at the Hilton
- Friendly, focused, face-to-face networking with partners, old and new
- Fam trip places available
- Organised by English UK
- Register at studyworldfair.com



Contact and more information:

roz.mcgill@englishuk.com

englishuk.com

study.englishuk.com

