



Help us become the world's premier ELT destination again

HOW THE GOVERNMENT CAN HELP OUR INDUSTRY THRIVE

English UK position paper / April 2023 (updated May 2023)

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ENGLISH LANGUAGE TEACHING: WHO WE ARE AND WHAT WE NEED

English language teaching (ELT) is a global industry, which the UK led until 2019.

Our ELT member centres, situated all over the UK, attracted more students than any of our competitor nations, feeding £1.4 billion into the economy and supporting over 35,000 jobs.¹

ELT also helps the UK build relationships with the rest of the world and encourages former English students, their friends and families, to come here as undergraduates, postgraduates, tourists and workers.

But two key external factors have decimated our industry.

Covid-19 stopped students travelling to the UK for much of the period from early 2020 to early 2022. And the end of freedom of movement and ID card travel in September 2021 shattered our largest single market, and made it more difficult to staff our schools.

Our language schools are resilient and innovative, but UK ELT is competing with one hand tied behind its back.

All the benefits ELT has brought to the UK can be ours once more. A few simple tweaks by the government could create a level playing field between us and our global competitors. Then we can do the rest.

This position paper explains how.

£ **1.4**
billion

added to the UK economy by the ELT sector in 2019



The English language teaching sector creates

**35k+ jobs
in the UK**

ABOUT ENGLISH UK

English UK is the national membership association for accredited English language teaching centres. We represent around 330 ELT centres in the private and public sectors across the UK, which are fully accredited by the British Council to teach English.

We support our members with business-critical research, guidance, events and training. We also campaign for policies that will allow the sector to thrive and continue transforming students' lives through learning and intercultural understanding.

englishuk.com

¹ The Value of English Language Teaching, Capital Economics/ Bonard, January 2018

THE STATE OF THE UK ENGLISH LANGUAGE TEACHING INDUSTRY

Teaching English as a foreign language is a significant global industry. An estimated 1.4 million students travel abroad to study English every year² and there are roughly 2.3 billion English language speakers (first or additional language) worldwide, according to the British Council.³

English is a lingua franca, used daily in millions of interactions between people for whom it is not a first language. It is the language of business, entertainment and travel.

The world's first English language school opened in London in 1912, with an explosion in the number of UK centres around the turn of the millennium.

By 2019 the UK was the most popular destination in a global English language teaching industry.⁴

But since then, the UK ELT sector has been hit by both the Covid-19 pandemic and the end of freedom of movement.

Covid-19 travel restrictions physically prevented our students from reaching us. And ending freedom of movement means 60% of our customers, Europeans, cannot reach us without the cost and bureaucracy of a passport.⁵

The home of English language learning is deterring English language students.



² 2021 Global ELT Overview, English UK/ Bonard, October 2022

³ The Future of English: Global Perspectives, British Council, April 2023

⁴ Student Statistics Report 2020: English Language Students in the UK in 2019, English UK/Bonard, May 2020

⁵ Ibid.

HOW THE UK IS DETERRING ENGLISH LANGUAGE STUDENTS

An 81% decline in student numbers in 2020⁶ was followed by a further 34% decrease in 2021,⁷ when we saw only a tenth of pre-pandemic student numbers. This decline was entirely due to Covid-19.

Now we are also seeing the effects of losing freedom of movement within the EU/ EEA.

In 2022, English UK member centres welcomed 239,576 English language students – around 45% of pre-pandemic student numbers.⁸

UK ELT's biggest market was the hundreds of thousands of school children from the EU, who enjoyed group study holidays. The new requirement for an expensive passport for a short educational trip, and sometimes a visa as well, means the overall number of school groups coming to the UK in 2022 was 83% down on pre-pandemic volumes, with many choosing to go elsewhere.⁹

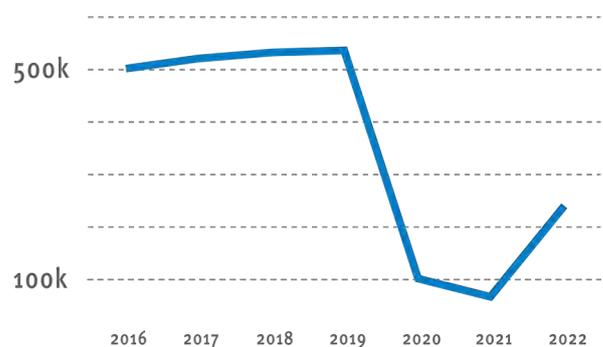
Our ELT competitors within the EU, Ireland and Malta, lost just 30% of their equivalent trade.¹⁰ This makes clear that Covid-19 is no longer the issue. This problem is of the UK's own making.

If the rules remain unchanged, European study travel agents do not anticipate a full recovery of the UK youth market until 2030. Almost 25% believe it will never recover.¹¹

We have been proactive in solving our sector's problems, but the issues facing us now can only be alleviated with government action.

Student numbers down 55% in 2022

compared to pre-pandemic numbers



Note: student numbers for 2016-2018 have been adjusted by +5.2% to include an estimated number of part time students. This increase is based on 2019 figures, where part time students were recorded for the first time and accounted for 5.2% of total student numbers.

⁶ Student Statistics Report 2021: English Language Students in the UK in 2020, English UK/Bonard, May 2021

⁷ Student Statistics Report 2022: English Language Students in the UK in 2021, English UK/Bonard, May 2022

⁸ Student Statistics Report 2023: English Language Students in the UK in 2022, English UK/Bonard, May 2023

⁹ The Economic impact of the requirement for EU students on school trips to have passports to enter the UK, Tourism Alliance, November 2022

¹⁰ Ibid.

¹¹ Ibid.

ABOUT UK ELT AND THE BENEFITS WE BRING

Attracting English language students back to the UK needn't be hard or expensive – but the sector cannot do it alone.

The good news is that there are simple, cost-neutral solutions that would allow UK ELT to carry on doing what it does best: attracting the world to study here.

Enable us to do that once more, and ELT alone can bring £1.4 billion¹² into the UK economy, with up to another £825 million in lost youth travel.¹³

Our sector can also support more than 35,000 jobs at all levels, all over the UK, many in our coastal communities. It also feeds the £20 billion international education sector.¹⁴

And those are just the spreadsheet benefits.

Learning English in the UK often leads to a lifetime of affinity among people who go on to become influential in their own nations, encouraging them and their families to return as students and tourists, and building trade networks and cultural relations.

With the right support, our industry can bring huge benefits to the UK economy once more.

“The ELT sector is of huge strategic importance. Over half a million students a year travel from overseas to study at a language school in England and bring with them £1.4 billion of support to the wider tourism and hospitality industries.

A language school is their first contact with this great country and it is where they learn our diverse culture and values... many of these students go on to study at a university or set up as business in the UK.”

- Letter from 36 Conservative MPs to the Prime Minister, June 2021

¹² Capital Economics/Bonard research conducted with English UK member centres, January 2018

¹³ A New Youth Group Visa Process, Tourism Industry Council's International Competitiveness & Demand Working Group, October 2022

¹⁴ UK revenue from education related exports and transnational education activity in 2016, Department for Education, January 2019

ABOUT UK ELT AND THE BENEFITS WE BRING CONT.

ELT attracts students of all ages and from all over the world to learn English in specialist centres in the UK. These include privately-owned language centres, which can be family-owned or part of larger chains, schools, further education colleges and university departments.

Many ELT centres are based in coastal communities, which rely on the wide range of skilled and unskilled work they provide both directly and indirectly.

Beneficiaries range from teachers and managers to taxi and coach drivers, staff in cafés and tourist attractions, and people who host students in their homes.

Pre-pandemic, the UK was the dominant player in the global ELT industry. We attracted 550,000 students annually – almost twice as many as our closest English-speaking competitor – with almost 60% from Europe.¹⁵

Pre-pandemic, ELT students spent twice as much money in the UK and stayed three times as long than other inbound travellers, according to VisitBritain research.¹⁶



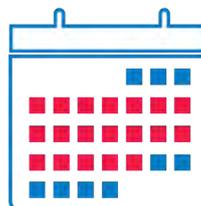
ELT students **spend twice as much** money in the UK than other visitors



58% of English language students in the UK are **from the EU**



every part of the UK benefits from ELT students' spending and the jobs created by language centres



ELT students **stay in the UK three times longer** than other visitors

¹⁵ Student Statistics Report 2020: English Language Students in the UK in 2019, English UK/Bonard, May 2020
¹⁶ Inbound visitors who take an English language course, VisitBritain, September 2020

IMPACT OF THE PANDEMIC AND NEW IMMIGRATION RULES ON UK ELT

The pandemic and Brexit have both had massive impacts on UK ELT. In different ways they have prevented students from reaching our schools. The result has been to make many schools less financially viable, and to hand business to our global competitors, in particular Malta and Ireland.

LONG-TERM EFFECTS OF THE PANDEMIC

UK ELT lost almost 80% of its business to the Covid-19 pandemic in 2020 and 2021. The sector saw a £590 million loss in 2021 and booking levels recovered much more slowly in 2022 than in the wider tourism industry.¹⁷

Few centres were granted business rates relief and a significant minority were forced to close.

EU DESTINATIONS ATTRACT CHILD TRAVELLERS AWAY FROM UK

The end of freedom of movement, and therefore the end of ID card travel, has decimated the UK ELT junior market.

A 2022 survey of EU travel agents found the numbers of children they sent to the UK was down 83% on 2019. Comparable visits to EU countries were down only 32%, and those to Ireland and Malta just 29%.¹⁸

The need for passports was cited as the main barrier to travel to the UK for European young learners – our largest market.

Almost 75% of those agents did not foresee a full recovery of the UK youth market until 2030. Just under a quarter said there would be no recovery while the requirement for school groups to have passports remained.¹⁹

UK VISA REGULATIONS DETER CHILD GROUPS

The List of Travellers Scheme allowed children living in the EU, but who were not citizens, to travel to the UK as part of a group if they were specifically listed.

The abolition of the List of Travellers Scheme by the UK government means many children need a visa as well as a passport to enter the UK.

Getting a visa means at least one trip to the processing centre, which may be a day's travel away. It may even require overnight accommodation as well as the cost of the visa itself. This puts getting a UK visa for a short school trip beyond the reach of many families.

Inclusivity rules mean EU school trips must be cancelled if travel requirements exclude some classmates, and many groups are booking elsewhere for this reason.

¹⁷ Tourism Recovery Plan: Update on delivery, Department of Culture, Media and Sport, March 2023

¹⁸ The Economic Impact of the Requirement for EU Students on School Trips to have Passports To Enter the UK, Tourism Alliance, November 2022

¹⁹ Ibid.

WHAT ARE WE DOING TO SUPPORT RECOVERY?

Supporting members is our number one priority. We do this by providing timely advice, lobbying for support, providing specialist market insight and training and marketing the UK offer to the rest of the world.

ENGLISH WITH CONFIDENCE CAMPAIGN

English UK developed English with Confidence, a campaign under the GREAT Britain brand, to promote UK ELT to the world.

The campaign includes a self-funded microsite to inform and reassure study travel agents, parents and students that travelling to the UK for study is safe and easy.

We work with the Department for Business & Trade, the British Council and Study UK to promote the campaign via partners, embassies and British Council offices worldwide.



SUPPORTING MEMBER CENTRES

We supported our member language centres fully during the Covid-19 pandemic, including creating online networking events with study abroad agents. Now we are focusing on staffing and immigration issues.

MARKET INSIGHTS

English UK collects data and analyses trends in 114 different markets, more than any other ELT destination, indicating further potential for growth. The global demand for English language learning is huge.

UK ELT INNOVATIONS

Although English UK members pivoted to online teaching during Covid-19, this is not a viable standalone business option for most English UK member centres now that students have begun to travel again.

The USP of UK ELT is the experience of living, learning and travelling in the UK, the home of the English language. It is difficult for our industry to compete with longer-established and more economic online learning options from our competitors.

HOW CAN THE GOVERNMENT HELP?

We need a supportive immigration system to enable our youngest students to travel easily once more, and national support for ELT marketing so we can reach new destinations, compensating for the lack of freedom of movement for older students.

The problems we are facing are structural and can only be solved by the government. In most cases all we need are minor tweaks to regulations to support our industry and others in the travel sector.

We believe this can be done in a cost-neutral way that would bring major financial benefits to the UK economy and would not risk the security of our borders.

1. Expand and reform the Youth Mobility Scheme
2. Introduce Youth Group Travel Scheme for children
3. Recognise the List of Travellers Scheme
4. Enable students already studying in the UK to apply for a new visa for further study without leaving the country
5. Restore work rights for all students studying on a Student Visa
6. Recognise Accreditation UK on all visa routes
7. Help ELT centres to recruit the qualified seasonal staff they need
8. Drive and measure success by setting a national growth target for ELT students in the UK
9. Support our international UK ELT marketing efforts

1. EXPAND AND REFORM THE YOUTH MOBILITY SCHEME

The UK Youth Mobility Scheme (YMS) is a cultural exchange programme allowing people aged 18-30 from 11 countries to live, work and study in the UK for two years. They experience life in another country, learn a different language and develop skills and abilities that will benefit them throughout their career.

It also supports the UK's cultural, political and business links with other countries.

The YMS is under-used as the UK only has a few agreements and there is a mismatch between supply and demand in countries' allocation of places.

We and the Tourism Alliance believe six changes to the scheme would be helpful.

These changes would make the UK a more attractive place to study English and would potentially help bridge short-term staffing problems for ELT and the wider hospitality industry, while we attract and train new specialist staff to replace those lost when we left the EU.

They would also allow people to study and work in the UK, or work as au pairs or similar, and study English as part of their programme.

We urge the government to be proactive on negotiating youth mobility agreements with our EU partners.

CHANGES NEEDED TO THE UK YOUTH MOBILITY SCHEME

- Expand the YMS with bilateral deals with EU countries which formerly had freedom of movement to the UK, ideally with no caps on numbers.
- Include YMS in future trade deals, as it has been with India.
- Enhance YMS agreements which extend the age limit to 35 and allow up to three years in the host country, as is now the case with Australia and New Zealand.
- Increase flexibility in how quotas are used to better meet supply and demand.*
- Raise the caps for EU students and existing YMS countries such as Japan.
- Negotiate bilateral training programmes with YMS partners as a replacement for Erasmus+ programmes.

* At present, there are 59,500 YMS visas available each year but in 2019 only 20,107 people arrived using them. While there are 30,000 visas allocated to Australia but rarely more than 10,000 applicants, there is always more demand in Japan than can be met by the 1,500 visas allocated.²⁰

2. INTRODUCE YOUTH GROUP TRAVEL SCHEME FOR CHILDREN

In 2019, 1.2 million EU children aged under 18 visited the UK as part of a youth group or school trip to attend an English language school, visit the sights, or take part in a cultural or sporting event.²¹

Collectively this market contributed over £1 billion annually to the UK economy and supported over 17,200 UK jobs in every part of the UK.²² It was also the most important market for UK ELT, with over 50% of students aged under 18.²³

Most travelled on their ID cards: few owned passports as they could travel throughout Europe without one. The end of freedom of movement severely impacted this market.

2022 research by the Tourism Alliance, UKinbound, English UK, the European Tourism Association (ETOA) and the British Educational Travel Association (BETA) found the end of ID card travel caused an 83% decline in EU student group visitors to the UK in 2022, losing around £875 million and 14,500 jobs.²⁴

The Council of Europe collective passport scheme offered as an alternative is unviable and now being removed as a route by the Home Office.

Our Youth Group Travel Scheme, proposed with the Tourism Alliance and BETA, would solve this problem. Students could travel for up to six weeks with a passported teacher as part of an educational group from the EU, EEA and Switzerland to attend an accredited ELT centre and visit cultural and historic attractions.

The scheme would be open to EU nationals and residents under 18. 60% of the UK public supported the idea of both students and adult leaders of educational groups being able to travel to the UK on ID cards.²⁵

In 2022 the Tourism Alliance wrote: “Prior to the UK leaving the EU there was no evidence the List of Travellers Scheme was being abused as a route of entry into the UK or that school children were security risk to the UK. As such we do not believe that developing a new Youth Group Travel Scheme would make the UK border any less secure. Introducing such a scheme would enable UK travel operators and businesses to win back the UK’s share of the EU student group travel market, generating at additional £875 million for the UK economy.”²⁶

“If students cannot travel using their ID cards, our groups have told us that they will not come to the UK. They will go to Ireland or Malta. This school will not be financially viable without those groups and after 53 years will be forced to close.” – language school owner, 2019

21 The Economic Impact of the Requirement for EU Students on School Trips to have Passports To Enter the UK, Tourism Alliance, November 2022

22 Ibid.

23 Student Statistics Report 2020: English Language Students in the UK in 2019, English UK/Bonard, May 2020

24 The Economic impact of the requirement for EU students on school trips to have passports to enter the UK, Tourism Alliance, November 2022

25 Deltapoll/Linguastay Survey for BETA, January 2022

26 The Economic impact of the requirement for EU students on school trips to have passports to enter the UK, Tourism Alliance, November 2022

3. RECOGNISE THE LIST OF TRAVELLERS SCHEME

Before the end of freedom of movement, travel to the UK was easy for children living in the EU. The List of Travellers Scheme allowed EU residents without citizenship to travel on ID cards, without a visa, as part of a group.

UK immigration had their full details but the expense and bureaucracy of a visa was unnecessary. This is important on school trips, which in many cases are not allowed to go ahead if some classmates cannot participate.

Resuming the List of Travellers Scheme would allow many more school trips to the UK.

A market that would particularly benefit from this is Italy.

It is common for children to be resident in Italy without an Italian passport. Plus there are frequent government or EU-funded schemes that send Italian school children abroad to improve their English.

Italy was the top source market for UK ELT before the pandemic, sending over a quarter of all students in 2019. In 2021, it dropped to just 6% of the market and in 2022 is expected to have recovered to around 15%.²⁷



²⁷ Student Statistics Report 2022: English Language Students in the UK in 2020, English UK/Bonard, May 2022

HOW CAN THE GOVERNMENT HELP?

4. ENABLE STUDENTS TO APPLY FOR A NEW VISA FOR FURTHER STUDY WITHOUT LEAVING

UK ELT's competitor countries allow students to apply for a visa covering several stages of study without the need to return home and reapply.

During the pandemic the UK granted this on a temporary basis to students stranded in the UK during the first national lockdown.

Restoring this would make the UK a more attractive destination, especially if those arriving on the 11-month short term study visa could apply for a full student visa without having to leave the country.

This would support us against competitors with more generous visa regimes and allow a seamless transition for people already embarking on their study journey in the UK.

It would undoubtedly make the UK a more attractive proposition for committed students who need to improve their English skills before progressing to university-level study.



5. RESTORE WORK RIGHTS FOR ALL STUDENTS ON A STUDENT VISA

The UK faces a significant disadvantage compared to its competitors, which generally allow all English language students to work during their courses.

Until around a decade ago, ELT students had the right to work in the UK. This meant they could gain some work experience or support themselves financially during their studies.

Over the past decade this has been removed from those studying in further education colleges and private language centres, and is now only open to those studying at centres offering degree level programmes with a track record of compliance.

We want to see work rights restored for English language students studying on a Student Visa.

Work is an attractive part of the offer for students as it allows them to practise English in the workplace and gain valuable work experience and life skills. It would particularly attract students from markets such as Brazil as well as the EU, where freedom of movement means we are losing out to Ireland or Malta.

Currently, work rights are only available where an institution provides courses above RQF 4 (equivalent to the first year of an undergraduate degree, such as certificate of higher education, higher apprenticeship or higher national certificate) and is registered with the Office for Students (OfS).

If institutions providing lower level courses were also allowed to register with the OfS, those with a solid record of visa regulations compliance could offer work rights to adult English language students.

This would bring us into line with competitor nations' offers, without compromising on rigour. Since student migration rules were tightened, there have been few or no cases of people failing to return home or breaking the terms of their study in the UK.

HOW CAN THE GOVERNMENT HELP?

6. RECOGNISE ACCREDITATION UK ON ALL VISA ROUTES

Since the 1980s, the UK has led the way on raising standards in English language teaching.

Accreditation UK, which celebrated its 40th anniversary in 2022, is the only UK inspection framework focusing on ELT and raising standards within the industry. The quality assurance scheme is the world's oldest and has a global reputation for excellence.

We believe the Accreditation UK scheme should be recognised by the government as an educational oversight provider on the sponsored student visa route as well as for short-term study and visitors.

This would enable our 300+ English UK member language centres to offer a wider range of courses and create a more competitive UK offer.



7. HELP ELT CENTRES TO RECRUIT THE QUALIFIED SEASONAL STAFF THEY NEED

ELT is a seasonal industry that needs large numbers of qualified staff during short summer and Easter peaks.

Before Brexit, over 50% of activity leaders came from the EU. Many teachers and directors of studies did too, moving between the UK and EU to fill gaps in the busiest times. Schools often recruited qualified EU staff to complement their UK-based staff. ²⁸

Now this movement of qualified and experienced staff to fill gaps at peak times is not possible, most English UK members report staff shortages, some of which are difficult to address in the short term.

Qualifying to teach English as a foreign language in a UK ELT centre accredited by the British Council is only open to graduates and costs around £1,000.

As no financial support is available and ELT has become a less attractive career since Brexit limited opportunities to work abroad, numbers training have plummeted.

Other seasonal opportunities in language schools are also difficult to fill.

In order to thrive, the UK ELT sector needs:

- An uncapped Youth Mobility Scheme for EU, EEA and Swiss nationals, enabling them to work for ELT centres once more, especially in seasonal roles.
- Inclusion of ELT teachers and activity leaders on the Migration Advisory Committee's Shortage Occupations Lists.
- Advanced Learner Loan Scheme facilities to be regularly available for TEFL (teaching English as a foreign language) training providers within privately-owned language centres as well as further education colleges.

HOW CAN THE GOVERNMENT HELP?

8. SET A NATIONAL GROWTH TARGET FOR ELT STUDENTS IN THE UK

The International Education Strategy's 2021 update did not include a growth target for international English language students studying in the UK. This is an omission.

80% of ELT students wish to return to the UK for travel or further study²⁹ and it is a clear pathway to our universities as well as an important channel to promote intercultural understanding.

Targets for the UK higher education sector should be joined by ambitious targets for all parts of the UK's international education system, including ELT.



²⁹ International students and their value to the UK, English UK, January 2018

9. SUPPORT OUR INTERNATIONAL UK ELT MARKETING EFFORTS

The pause in normal business caused by the Covid-19 pandemic and the change to UK immigration regulations, means global marketing of ELT it is more important than ever.

We have been proactive in this area. Our GREAT Britain-branded English with Confidence campaign includes a website, shareable collateral and social media, providing reliable and reassuring information about studying English in the UK after Brexit and Covid-19.*

This information is shared through Department for Business & Trade and British Council networks. But we need to do more.

Our research identifies growing global demand for ELT. Government support is necessary to help us create and develop a presence in potential new source markets.

In order to thrive, the UK ELT sector needs:

- Funding to expand our English with Confidence campaign to meet the needs of our sector and target priority audiences for recovery and growth.
- Clear, consistent and positive messaging led by government. This will support promotional campaigns targeting partners, buyers, students and influencers.
- Increased support for Ministerial and Export Champion-led trade missions to key markets where specific barriers to trade have been identified.
- More grants and financial support for education exporters, especially in new markets.

* See study.englishuk.com

THANK YOU

Thank you for your time and support.

Together we can help a positive, valuable UK industry thrive once more - let's make the UK the world's premier English language learning destination again.

If you have any questions, please contact English UK via phone or email:

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