ENGLISH UK
English Language Teaching (ELT) Sector Action Plan

1. Where the Sub-Sector Is Now Internationally

A. Sub-Sector Distinctive International Offer

- Long-established international reputation for high-quality English language education.
- Recognised accreditation schemes, including Accreditation UK, provide frameworks for quality assurance, safeguarding and student welfare standards that support trust and consumer confidence.
- Diverse provision including accredited language centres, university language centres, FE providers, pathway programmes, junior and summer programmes, teacher training, examination preparation and specialist English.
- ELT can provide an entry point to the wider UK education system by developing learners' language proficiency, academic readiness and familiarity with UK education.
- Long-standing expertise in teacher training, professional development, curriculum support and institutional capacity-building.
- Established institutional partnerships worldwide, including relationships with international agents, schools, universities, ministries and scholarship bodies.
- Contributes to UK education exports and visitor-economy activity across the UK through tuition fees and student spending on accommodation, transport, tourism and retail.
- Flexible short-term, seasonal, digital, hybrid and transnational models that can respond to different learner, partner and market needs.
- Strong cultural immersion opportunities through study in England, Scotland, Wales and Northern Ireland.
- Contributes to UK soft power by building long-term personal connections, institutional relationships and positive engagement with the UK.

B. The Current Operating Environment

In 2025 UK ELT providers recorded 351,762 enrolments and 1.2 million student weeks from learners representing 114 countries. Provision spans private and public-sector language centres, junior programmes, pathways, teacher training, specialist English and digital delivery.

Providers operate in a competitive environment characterised by rising costs, accommodation constraints, workforce pressures, changing mobility patterns and increasing international competition. Stakeholder feedback also indicates that perceptions of UK visa and mobility policies can influence destination choice.

Evidence is strongest for enrolments, student weeks and source-market composition. Further work is required to strengthen evidence relating to progression, economic impact, partnerships and transnational activity.

C. International Market Access Barriers

Barrier	Market / Region Affected	Impact on International Growth	Evidence / Source	Practical Solution / Mitigation	Link to IES Ambition
International perceptions of UK visa policy and mobility arrangements	All source markets	Can reduce destination confidence, increase complexity for learners and stakeholders, and weaken the UK's competitiveness relative to alternative destinations	English UK provider and agent intelligence; relevant visa, and mobility data; market research; international competitor comparison	Clear, consistent international communications and coordinated factual messaging through trusted established channels	1, 2
Increasing international competition from alternative English-speaking destinations	All markets, with the strongest effect in price-sensitive and highly contested segments	Can reduce UK market share, particularly where competitors offer lower costs, simpler mobility arrangements or comparable English-language experiences	English UK statistics, competitor statistics, and market intelligence	Promote quality, safeguarding, regional choice and progression value; segment offers; develop partnership and hybrid models where viable	1, 2, 3
Accommodation and homestay capacity	UK-wide, especially peak-season junior and group destinations	Constrains enrolment, affordability, student choice and regional growth	Sector consultation and English UK market intelligence	Support provider host-recruitment and retention campaigns; share effective practice; strengthen accommodation partnerships	2, 3
Workforce capacity and rising operating costs	UK-wide; strongest impact on SMEs and seasonal provision	Limits delivery capacity, increases prices and reduces the ability to invest in growth or partnerships	Sector consultation, provider surveys, operating and staffing data	Develop practical support for SMEs, including shared workforce practice, professional development, collaborative procurement and seasonal capacity planning. Focus growth activity where sufficient delivery capacity exists	2, 3

Barrier	Market / Region Affected	Impact on International Growth	Evidence / Source	Practical Solution / Mitigation	Link to IES Ambition
Data fragmentation and gaps in impact measurement	UK-wide and all international markets	Makes it harder to assess opportunities, prioritise actions, show impact and monitor progress consistently	English UK data; sector evidence; ONS, VisitBritain and other relevant datasets	Agree a proportionate baseline, common definitions and an annual reporting cycle to the Education Sector Advisory Group (ESAG); pilot measures for progression, partnerships and economic impact	1, 2, 3

2. Future ambition

D. International Ambitions for the Sub-Sector

By 2030, UK ELT aims for the UK to be recognised as the world's leading destination for high-quality English language education, measured through international demand, market position, learner experience and partner confidence.
The sector seeks sustainable, diversified growth that advances all three IES ambitions. By 2030, it aims to increase export value and international reach; strengthen regional economic contribution and progression into wider UK education; deepen educational partnerships; reinforce confidence in UK quality, safeguarding and learner welfare; and improve resilience through a more diversified, evidence-led sector.

IES AMBITION	SUB-SECTOR AMBITIONS THAT CONTRIBUTE TO IES
Increase the UK's international standing through education and make the UK the global partner of choice at every stage of learning	Improved recognition and partner confidence in UK ELT quality, safeguarding and teaching expertise
Continue to sustainably recruit high-quality international students from a diverse range of countries	A broader source-market and programme mix, recovery in European educational travel, and increased progression into wider UK education
Collectively grow education exports to £40 billion per year by 2030	Higher export value and stronger evidence of ELT's contribution to national and regional economic activity

E. International Markets

Market activity will follow a selective and evidence-led portfolio approach, reflecting differences in market maturity, provider capability, likely economic value and delivery feasibility. UK ELT will prioritise markets that combine current demand, growth potential, diversification opportunities and alignment with the IES ambitions. Priority markets were assessed against four criteria: current scale and trend; realistic growth or recovery potential; strategic contribution to diversification and IES priorities; and provider capacity to deliver. The assessment was informed by sector evidence and provider insight, while taking account of the International Education Champion's focus countries, wider IES priorities and relevant Trade Strategy objectives where these help shape international opportunity.

English UK enrolment and student-week data indicate that student mobility and educational travel offer the largest near-term opportunities by current scale. Progression, teacher development, institutional partnerships and transnational delivery offer additional opportunities for growth and diversification, although the evidence base for their current economic contribution remains less complete. Digital delivery is expected to play a complementary role where provider capability, learner demand and viable commercial models support sustainable delivery.

- **Europe** remains UK ELT's largest source region and its most immediate growth opportunity. Growth in educational travel, school groups and youth mobility would support enrolments, student weeks and regional economic activity. Key constraints include mobility arrangements, affordability and international competition.
- **Gulf Cooperation Council (GCC) markets** provide established, relatively high-value demand for UK study, alongside opportunities in professional English, teacher development and institutional partnerships. Market potential varies by country and is influenced by government priorities, scholarship programmes and economic conditions.
- **Japan and South Korea** remain important markets for cultural immersion, junior programmes and premium educational experiences, aligning strongly with UK strengths in quality, safeguarding and learner welfare. Future growth opportunities are likely to be targeted and segment specific.
- **Latin America,** particularly Brazil, Colombia and Mexico, offers diversification opportunities across student mobility, pathways, teacher development and institutional collaboration. The scale of opportunity should continue to be assessed against competitor destinations and market conditions.
- **India** presents opportunities in pathways, academic English, teacher development and institutional partnerships, building on wider engagement with UK education. Activity should focus on areas where UK ELT can demonstrate distinctive value alongside strong domestic provision.
- **Selected Southeast Asian and Central Asian markets** offer opportunities in school partnerships, teacher development, academic English, junior programmes and institutional collaboration. Market selection should be guided by partner demand, affordability, policy stability and provider capability.

F. Sub-Sector Actions

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
1	1	Develop and deliver a coordinated UK ELT quality-and-welcome campaign for defined priority audiences, centred on accreditation, safeguarding, learner experience and the value of studying in the UK	English UK with participating providers	Q1 2027 launch; annual refresh	Campaign reach within priority audiences; partner & provider adoption; changes in target-audience awareness or confidence	Policy context, British Council and partner channels, sector participation, agreed messages, content and market insight
2	2,3	Support recovery in European school-group and educational-travel markets through targeted partner engagement, market briefings and provider offers addressing identified barriers	English UK and participating providers	Q1-Q4 2027	Change in student weeks from selected markets against the agreed baseline; number of reactivated or new school and agent partnerships; provider participation	Policy context, provider capacity, agent and school networks, accommodation
3	2	Strengthen practical progression partnerships between ELT providers and UK schools, colleges, universities and pathway providers, alongside a consistent method for recording learner transitions	English UK with education-sector partners, including schools, FE and HE	Pilot Q3 2027; review Q2 2028	Progression agreements or pilots; tracked learner transitions; participating providers	Partner engagement and commitment; common definitions, data-sharing approach
4	1, 3	Develop a UK ELT export growth programme to support providers in creating, testing and scaling international partnerships, teacher-training activity, institutional collaboration and transnational delivery in selected priority markets. The programme will strengthen provider capability, develop market-ready propositions and consortia and facilitate sustainable export opportunities aligned with IES priorities	English UK with participating providers	Design Q3 2027; pilot activity Q4 2027; scaling from 2028	Providers and consortia participating; market-ready propositions developed and tested; opportunities progressed; partnerships or contracts secured; evidenced export value and educational reach; repeat or expanded activity	Market intelligence and opportunity identification; provider capability and commitment; in-country partner engagement; alignment with British Council, BIST and wider UK international education activity where this supports sector-led delivery; sustainable funding and delivery capacity
5	1, 2, 3	Establish a proportionate ELT evidence framework, including agreed definitions, a validated baseline and annual reporting to ESAG	English UK with participating providers, ESAG and data partners	Q4 2026 - scope & initial data inventory; Q1 2027 - agree definitions and framework design; Q2-Q3 2027 - collect & validate baseline; Q4 2027 - first report	Definitions agreed; provider coverage; annual report completed	Proportionate provider data; common definitions; access to partner datasets; provider participation
6	1, 2, 3	Strengthen sector resilience through a targeted market-diversification programme in selected priority markets, supporting providers to build partnerships, expand student recruitment opportunities and reduce dependence on a small number of source markets	English UK with participating providers	Q3 2026 onwards	Share represented by top source markets; number of providers active in diversification markets; new partnerships established; student weeks from diversification markets; annual resilience review completed and acted upon	Market data and diversification metrics; provider participation and market intelligence sharing; access to in-market partners and networks; alignment with wider UK international education activity where relevant; British Council and BIST insight where agreed; geopolitical and economic stability in priority markets

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
7	2, 3	Strengthen accommodation capacity in priority growth destinations through regional partnerships that support homestay development, accommodation innovation and coordinated local solutions, enabling sustainable growth in student mobility and educational travel	English UK with providers, destination organisations, local authorities, accommodation partners and tourism bodies	Q1 2027 scoping and partner engagement; pilot activity from Q3 2027; evaluation and scaling from 2028	Number of priority destinations engaged; accommodation initiatives launched; additional capacity secured or mobilised; participating providers reporting accommodation constraints reduced; contribution to student-week growth in participating destinations	Provider participation; engagement from destination and accommodation partners; local stakeholder support; safeguarding and quality requirements; evidence of demand and regional growth potential

G. Delivery Enablers

Delivery Enabler	How It Supports Delivery	Who Can Access / Use It	What More Is Needed	Link to IES Ambition
Accreditation and quality assurance schemes (inc. Accreditation UK)	Provide recognised quality frameworks and common standards for learner protection, promotion and delivery	Accredited providers, learners, agents and partners	Consistent international messaging and stronger, comparable evidence of learner experience and outcomes	1, 2
English UK data and market intelligence	Supports market prioritisation, benchmarking, risk monitoring and performance reporting	English UK members and delivery partners	Agreed definitions, improved provider coverage, timely reporting and appropriate links to partner datasets	1, 2, 3
British Council and overseas networks	Can provide market intelligence, international relationships and routes for identifying potential partners	Providers and sector-led consortia	A focused pipeline linked to selected markets and actions	1, 3
Provider and cross-sector partnerships	Enable progression, joint offers, teacher development and institutional delivery	ELT, schools, FE, HE, pathway and training partners	Practical models, clear accountability and proportionate data-sharing	1, 2, 3
Regional destination and tourism partnerships	Support accommodation capacity, destination promotion and wider regional distribution of learners and associated expenditure	Providers, local partners and destination bodies	Pilot locations, shared evidence and safeguarding-aligned host activity	2, 3

H. Delivery Partners

Delivery Partner / Group	Role in Delivery	Actions They Support	Engagement Approach	Dependencies / Risks
English UK	Sector coordination, shared campaigns, market intelligence, evidence framework and reporting	1-7	N/A	Organisational capacity, market intelligence limitations and proportionate reporting burden.
Participating ELT providers	Delivery of market activity, pilots, partnerships and proportionate data returns	1-7	Working groups, member briefings, pilots and annual review	Provider capacity, participation and proportionate reporting burden
British Council	Potential role subject to agreement: support quality messaging, evidence, market intelligence and international relationship building	1, 4, 5, 7	Joint planning in selected markets and agreed use of quality evidence	Alignment of priorities, resources and market coverage
Schools, FE, HE, pathway and teacher-training partners	Potential role, subject to agreement: develop progression, joint programmes and institutional partnerships	3, 4, 5	Targeted partnership groups and pilot agreements	Partner commitment, learner referral routes and data-sharing
International agents, schools, ministries and institutions	Provide routes to learners, local insight and partnership delivery	1, 2, 4, 5, 7	Market briefings, missions, partner meetings and structured follow-up and relationship management	Partner quality, demand, local requirements and continuity
Destination, tourism, accommodation and local partners	Potential role, subject to agreement: support regional promotion and practical accommodation capacity	2, 7	Place-based pilots with clear safeguarding and quality requirements	Host supply, affordability, local coordination and seasonality

I. Progress Reporting to ESAG

KPI / Measure	Reporting Point / Date	What Success Looks Like	Target / Milestone	Evidence Source	Reporting Owner
Student reach and diversification	Annual, Q4	Growth in student weeks and export value across a broad range of markets, alongside measurable recovery in selected European segments	Baseline measure agreed; 2027 milestone and 2030 outcome target established thereafter	English UK annual and quarterly statistics; provider returns	English UK
Quality and learner outcomes	Annual, Q4	Accreditation, safeguarding and learner-experience indicators are maintained or improved against the validated baseline	Maintain strong quality baseline; define comparable satisfaction measure in 2027	Accreditation UK; other accrediting bodies; provider learner feedback	English UK with recognised accrediting bodies
Progression into wider UK education	Annual pilot review	An increasing proportion of participating providers can report learner progression using an agreed definition and method	Pilot common measure in 2027; expand coverage in 2028	Provider and partner progression returns	English UK with education partners
Education export and regional contribution	Annual, subject to data availability	A repeatable methodology provides more complete estimates of tuition income, associated visitor expenditure, exported services and regional distribution	Agree methodology and baseline in 2027	ONS, VisitBritain, English UK and partner evidence	English UK with data partners
International partnerships and exported expertise	Annual, Q4	An increasing number of active, repeat or expanded international partnerships generate evidenced educational reach or export value	Baseline in 2027; milestones set by action and market	Provider returns; partnership and programme records	English UK / action leads
Delivery resilience	Annual planning cycle	Annual market and delivery decisions explicitly consider market concentration, provider capacity and geopolitical and economic risk	Annual portfolio and risk review completed, with agreed decisions and mitigations recorded	English UK market review; provider intelligence	English UK