International English students & their value to the UK

Evidence from English UK to the MAC International Students' Enquiry

English UK is the trade body and membership organisation for accredited state and privately-owned English language teaching providers.

Executive summary

English language teaching (ELT) is a sector which is largely invisible to the British public, unless they encounter a group of exuberant teenage summer students queueing for a bus. But it is a significant export industry, bringing monetary, cultural, soft power and educational benefits to the UK with few, if any, negative impacts on the economy, jobs or services.

Figures gathered for this submission[1] suggest 550,000 international students came to the UK to study English at some level in 2016/17, staying for an average of 3.7 weeks. The majority of students - 60 per cent - at English UK member centres are from the European Union (EU).[2]

They attend universities, colleges, privately-owned language centres and boarding schools in every region and nation of the UK, sometimes located in areas where they become a significant driver for the local economy. Around half of the students are under 18: the vast majority come here to learn or improve English for further study or employment.

During an average month-long stay, each student's net fiscal contribution to the UK economy is £216. That represents a gross value added for the UK in 2016/17 of £1.429bn, and a turnover of £3.197bn.

ELT supports around 35,700 jobs, ranging from teachers and other language centre staff to supply chain employees, to workers in shops, transport, tourist attractions and other places where students and their overseas visitors spend money. ELT centres directly employ 19,300 staff in all roles, including welfare, host family liaison, marketing and management, with a full-time equivalent (FTE) of 14,800: 11,400 of these are highly-qualified teaching staff.

While UK PLC as a whole benefits from the tax take and wider job implications of ELT, and there are ELT centres in every region and country of the UK, there are also hotspots such as Bournemouth and Brighton where English students are a vital driver in the local economy. Even in Northern Ireland, the region with the smallest ELT presence, there are 160 staff in the language centres and 120 supplier jobs are supported through ELT alone, rising to 170 from all the activities of the centres. Similarly, there is a turnover of £14m from ELT activities in the region, rising to £19m if all the centres' activities are taken into account.

Students want to maximise their UK experiences and their spending extends beyond course fees and accommodation. During their time in the UK, they spent around £880m extra, with a further £155m a year coming from visiting friends and family.

But benefits to the UK extend far beyond jobs and export income.

[1] The Value of English Language Teaching, Capital Economics, 2018, The Social Impact of UK ELT, StudentMarketing, 2018
[2] English UK Student Statistics 2016

Studying here has a powerful effect on people, building a lifetime of affinity to and affection for the UK. Almost 80 per of current and past students plan to return, often bringing friends and family. Just two per cent do not intend to come back.

Many return for undergraduate or postgraduate study: students seeking English-medium education often form a bond with the country in which they first study. If students do not come to study English as a teen, they may never come at all.

Over 90 per cent of ELT students take part in UK life, with the majority attending cultural or social events, or making local friends. A minority volunteer in the local community.

They are a valuable source of income for ordinary families who care for them in their spare rooms, and they bring a wider cultural exchange, often starting friendships with host parents which can last for generations.

There are clear soft power benefits of having a significant group of highly-educated, motivated and often wealthy individuals as influencers once they have returned home to careers or further study. This particular soft benefit can only become more important as we make our way in the world post-Brexit.

The UK has always led in the ELT market, but that position is increasingly threatened as competitor English-speaking nations, understanding the value of these students to their own systems, seek to attract them elsewhere. In countries such as Australia and Ireland it has been policy at the highest level to build the ELT sector, in the knowledge that the students tend to remain loyal to their temporary home when choosing higher education.

In this climate, we need an even more explicit welcome to all potential students who wish to learn our language and experience our culture for themselves.

We are also concerned that the end of freedom of movement for EU nations from March 2019 does not cut us off from our key markets, which represent 60 per cent of our members' business.

We would like to see visa-free travel for students from Europe, and ideally a mechanism for teenage groups to be able to come for courses on a joint travel document without the need for passports. Without this, we fear an accelerated decline for this important industry as potential students choose Malta and Ireland instead.