English UK position paper: how the government can support our rebuilding strategy for UK ELT

May 2022

FOREWORD

Throughout the pandemic, the UK English language teaching sector has been planning and working for recovery. Our aim is to not just survive but thrive, and build our industry back better.

But the pandemic is not yet over for UK ELT, which lost 88% of its students over the last two years.

The Covid-19 pandemic prevented our customers from reaching us for most of 2020 and 2021, leaving our classrooms empty in peak periods and slashing income by over 80%.

Unable to pivot to domestic customers, UK English language teaching (ELT) centres have fared far worse than the tourism industry as a whole. Three quarters of UK ELT centres expect to fail in 2022, compared to a tourism industry average of 40%.[1]

Additionally, the UK's exit from the European Union has meant a new immigration process for our biggest markets. Many travellers may now choose competitor destinations that offer work rights and have no need for passports.

It is important that the UK uses its new freedoms to seize opportunities and remain internationally competitive by adopting some imaginative solutions.

The future for UK ELT is bright – students are keen to travel and there is a rise in bookings for our usual peak periods, spring and summer. Yet the first three months of 2022 were massively depressed for English UK member centres due to the effects of Omicron.

Pre-pandemic, the UK was the dominant player in the global ELT industry, attracting 550,000 students annually – almost twice as many students as any of our English-speaking competitors, with around half from Europe.

ELT injected £1.4bn into the UK economy annually; supported 35,000 jobs; underpinned the £20bn international education sector; and built positive relations between the UK and the rest of the world.[2]

A VisitBritain survey put those numbers even higher, discovering that English language students spent twice as much money in the UK and stayed three times longer than other inbound travellers.[3]

ELT centres were thriving, profitable businesses. They have shown immense resilience – 85% have survived despite having little income since the 2019 summer peak – and with modest government support, our world-class ELT centres will be successful again.

Read on to learn about the help we believe is crucial for our sector's survival, and its continued positive contribution to student lives and UK communities into 2023 and beyond.

1 Financial Impact Survey, Tourism Alliance, January 2022
2 Capital Economics/Bonard research conducted with English UK member centres, January 2018
3 Inbound visitors who take an English language course, VisitBritain, September 2020

ABOUT ENGLISH UK

English UK is the national membership association for accredited English language teaching centres in the UK.

We represent 340+ ELT centres in the private and public sectors. Based across the UK, all English UK members are fully accredited by the British Council to teach English.

We support our member centres with business-critical research and intelligence, guidance, advice, events and training – all to champion and advance our valuable sector.

As UK ELT's representative, we campaign for policies that will allow the sector to thrive and continue transforming students' lives through learning and intercultural understanding.

> “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 £1.4bn 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 a business in the UK.” [4]

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

EXECUTIVE SUMMARY

Teaching English usually needs little help from the government but instead supports the UK economy.

550,000 students bring in £1.4bn to the country annually, creating 35,000 jobs.[5] And UK ELT underpins the UK's £20bn international education sector.[6]

We rarely seek government help. But the 344 accredited ELT centres in English UK membership lost almost 80% of business to the pandemic in 2020 and 2021. The industry made a £590m loss in 2021.

And recovery for language teaching centres is much slower than for the rest of the tourism sector. For one third of teaching centres, booking levels were down by more than 50% on the pre-Covid-19 period for the first quarter of 2022, compared with a drop of 25% for the wider industry.[7]

And the Covid-19 pandemic is not the only challenge facing UK ELT.

The end of free movement and ID card travel for EU, EEA and Swiss nationals – our biggest source markets – is dramatically cutting student visits to the UK, particularly among school groups.

The future for UK ELT is bright. Teaching centres have already proven their resilience and students are keen to travel.

We are working hard to reassure our markets with ambitious projects, such as a multi-stakeholder campaign, English with Confidence, aimed at restoring trust among international students and study travel agents.

With some targeted support, we can return to our pre-Covid-19 successes and win a larger share of the global ELT market for the UK.

Before the pandemic and the end of freedom of movement, the UK had the largest share of the European ELT market, with nearly 60% of its students coming from the EU. We can regain this market share in the future with the right solutions and support.

The UK also has opportunities to take market share from competitors in global growth markets in Asia and Latin America.

In addition, UK ELT centres are chasing opportunities in non-traditional sectors including teacher training, capacity building, blended delivery and transnational education.

WHAT DO WE NEED?

To thrive again, UK ELT needs assistance in three areas:

- targeted business support
- a supportive immigration system
- marketing of UK ELT on a national scale.

5 Capital Economics/Bonard research conducted with English UK member centres, January 2018
6 Exports Minsiter Graham Stuart, House of Commons, 1 July 2020
7 Financial Impact Survey, Tourism Alliance, January 2022

EXECUTIVE SUMMARY CONT.

TARGETED SUPPORT FOR ELT CENTRES

- Offer business rates relief or CARF 2 for 2022-23 for ELT centres: we estimate this would cost well under £10m for full relief.
- No legal action by local authorities against ELT centres that have been unable to pay business rates as a result of the pandemic.
- Flexibility around CBILS repayments, consideration of a rent hardship scheme and more ARG funding for the sector.

A SUPPORTIVE IMMIGRATION SYSTEM

- Require all UK English language providers to be accredited and extend educational oversight to the British Council's Accreditation UK scheme so that it is valid for all visa routes.
- Extend the youth mobility scheme to EU/EEA countries and Switzerland through bilateral deals and with no numbers cap.
- Create a new Youth Group Travel Scheme, as proposed by the Tourism Alliance, to effectively create collective passports for the UK's wider educational travel sector.
- Enable students already studying in the UK on any visa to apply for a new visa for further study without leaving the country.
- Allow providers of courses below RQF level 4 to register with the Office for Students and demonstrate a track record of compliance, which would allow work rights for their students.
- Restore work rights of up to 20 hours a week for adult students on ELT courses with accredited providers on the government's register of sponsors, in line with major ELT competitor nations.
- Ensure any future travel restrictions imposed for a pandemic or any other reason consider the needs of sectors relying on short-term inbound tourism.

MARKETING ON A NATIONAL SCALE

- Drive and measure success by setting a national growth target for ELT students in the UK within the framework of the International Education Strategy. [8]
- Increase government resourcing for our English with Confidence campaign, to communicate the UK ELT offer and rebuild the international market.
- Make GREAT Britain campaign funding available in key source markets for the UK ELT sector.
- Increase financial support available for education exporters through schemes including the UK Tradeshow Programme.
- Provide a further £38m tranche for match-funded grants for SMEs in the Department for International Trade Internationalisation Fund.
- Negotiate bilateral agreements to allow English teachers and students on certain vocational courses to train in the UK, replacing £7m of lost Erasmus+ revenue.

8 International Education Strategy: 2021 update, Department for Education/Department for International Trade, February 2021

ABOUT UK ELT

INCOME, REVENUE AND JOBS

Before the Covid-19 pandemic, UK ELT was more valuable than the fishing industry, bringing 550,000 students, £1.4bn and 35k jobs to the UK every year.[9]

ELT centres are usually major contributors to their local economies and to 'levelling up': hiring both specialist and general staff, and creating business for local transport, tourism, retail and hospitality companies. They also provide extra income for households that host students.

Many ELT centres are based in coastal towns, where they are a major employer as well as a source of income for local businesses.

THE FOUNDATION OF THE UK'S INTERNATIONAL EDUCATION OFFER

In many cases, students who come to the UK to learn English, often as young teens, dream of returning to study at one of our world-class universities. 80% tell us they plan to return.[10]

"English language teaching plays a key role in underpinning the UK's wider education system by helping unlock the door for thousands of overseas students to courses at British universities and further education establishments. ELT is not only valuable in itself but is a pipeline to the wider educational offer."[11]

ELT's role in UK international education is increasingly played out outside our borders. By delivering world-class English language training, via blended and transnational education platforms, UK ELT centres support the export aims of the government in the International Education Strategy.

> "I have witnessed the truly world-class excellence of UK English language teaching. It is a superb British success story, which enriches the economic and cultural life of the country.
>
> It helps to bring young people from across the globe to our shores. It strengthens our ties with nations worldwide, as international students share their experiences of the UK with their friends and families, building our profile in some of the world's fastest growing global markets.
>
> It fosters business, opportunity and prosperity in all regions and nations of the UK and helps to level up our country."[12]

£1.4 billion

added to UK economy each year[13]

35k+ UK jobs

supported by English language students[13]

9 Capital Economics/Bonard research conducted with English UK member centres, January 2018
10 Bonard research for English UK, December 2017
11 International Education Strategy: 2021 update, Department for Education/Department for International Trade, February 2021
12 Exports Minister Graham Stuart, House of Commons, 1 July 2020
13 International English students and their value to the UK, English UK, January 2018

ABOUT UK ELT CONT.

WHAT ARE UK ELT CENTRES?

Most UK ELT centres are private businesses, including small family-run schools and international groups. A significant minority are publicly-owned, in further education colleges or universities.

UK ELT centres are based all over the UK. The largest concentrations of privately-owned centres are in Bournemouth, Brighton, Oxford, Cambridge and London, where they are a meaningful contributor to their local economy. Other hotspots include the South West, Kent, Edinburgh and Cardiff.

In 2019, a quarter of student weeks were taught in London, but Northern England increased its share by 9% and Central England by 21%.[14]

Summer-only centres catering for teens in the peak months are often in rural and coastal locations targeted by the government's levelling-up agenda.

WHO ARE UK ELT STUDENTS?

Students travel here to learn English for more than just language learning: they seek an immersive experience in the traditions, history, and culture of the UK.

Under-18s make up just over half (54%) of all students.[14] Many come for short language holidays in January, Easter and – most frequently – in summer.

Most under-18s learn in privately-run ELT centres, where they stay for an average of just under a fortnight.

Adults come to learn English for their careers, further academic study and for pleasure.

In 2019, adults stayed in privately-run centres for almost five weeks on average, and for almost 11 weeks in state sector centres.

14 Student Statistics Report 2020: English language students in the UK in 2019, English UK/Bonard, July 2020.
Note, a student week is one week with 10 hours or more of teaching.

ABOUT UK ELT CONT.

WHAT ARE UK ELT'S MARKETS?

In 2019, the last year before the pandemic, 57% of all students (and 65% of student weeks) came from the EU. The top five source countries for private sector centres were Italy, Saudi Arabia, Spain, China and France. For state sector ELT providers the top five were China, Saudi Arabia, Japan, Romania and Poland.

While 86% of students studying English in the UK come from just 20 countries, English UK collects data on 114 different markets for UK ELT. We work in a much wider spread of markets than any other ELT destination, indicating depth and further potential for growth. [15]

We analyse market potential in each country by considering economic and demographic factors alongside its average English language proficiency. The global demand for English language learning is huge.

WHAT COMPETITION DOES UK ELT HAVE?

English language teaching started in the UK but is now a global industry and a maturing market. The world's oldest English language school opened in London in 1912, with many others following over the course of the 20th century.

The UK attracts around twice as many students as its nearest competitor, the USA, but shares second place with Australia in the overall time students spend studying.

"Approx. 1.38m students travelled abroad to learn English in one of the eight major ELT destinations (the UK, USA, Australia, Canada, Ireland, Malta, New Zealand and South Africa) in 2018. Country-to-country comparisons show destinations are growing at each other's expense." [16]

WHERE ARE UK ELT'S OPPORTUNITIES?

Nearly 60% of students studying English in the UK pre-Covid-19 were from the EU: the UK has the biggest share of the market in Western Europe. Proximity and, until 2021, freedom of movement, made the UK the most popular destination for European English language student travellers.

Growth in the global ELT market is in Asia and Latin America, and there are opportunities for the UK to increase its market share in these regions at the expense of our competitor English language teaching destinations.

For example, the UK's estimated share of the English language student travel market in China is 15%, 11% in Japan, 13% in Thailand, 7% in Brazil, 9% in Colombia and 8% in Mexico. [17]

UK ELT centres are also chasing opportunities in non-traditional markets, in areas such as teacher training, capacity building to support national language and skills policies, blended delivery and transnational education.

15 Student Statistics Report 2020: English language students in the UK in 2019, English UK/Bonard, July 2020
16 Global ELT Overview 2018, English UK/Bonard, 2019
17 Student Statistics Report 2021: English Language Students in the UK in 2020, English UK/Bonard, May 2021

THE IMPACT OF COVID-19

ELT centres in the UK closed to keep people safe in the first national lockdown.

Two years later, some are still closed or only partially open as continuing travel restrictions in our biggest markets, lack of confidence and new passport requirements deter students.

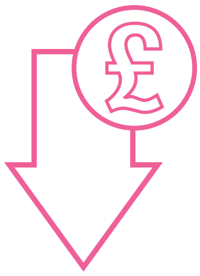
VisitBritain figures suggest a 97% drop in inbound travellers in Q2 2021 compared with Q2 2019. And an 85% drop in visitors whose primary purpose was study.[18]

When centres stopped face-to-face teaching in March 2020, remaining students learned online or returned home, and booked students postponed or cancelled their courses.

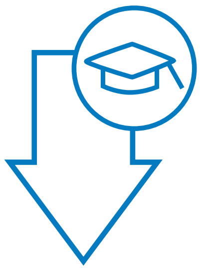
While many ELT centres successfully offered online courses, they are not viewed as a true substitute for a face-to-face course, with the experiential learning of being in the UK and opportunities to combine study with cultural, sporting and leisure activities.

There is huge global competition in online ELT, with significant previous investment by some organisations based overseas. Online provision is not a replacement revenue stream for most UK ELT centres.

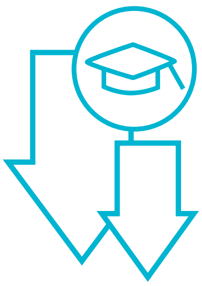
English UK's latest figures show a serious drop in student numbers and revenue for the UK ELT sector over the past two years.[19][20]



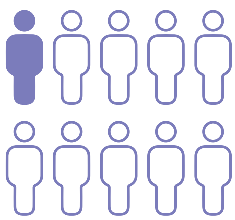
£50 million in revenue loss in 2020 as a direct result of the Covid-19 pandemic.



84% decrease in student numbers from 2019 to 2020.



36% decrease in student numbers from 2020 to 2021.



just **10%** of **students** came to study English in the UK in 2021 vs 2019.

18 Covid-19 Impact Survey, VisitBritain, October 2021
19 Student Statistics Report 2020: English language students in the UK in 2019, English UK/Bonard, July 2020
20 English UK Covid-19 impact report, English UK/Bonard, March 2021

THE IMPACT OF COVID-19 CONT.

UK ELT CENTRES ARE RESILIENT – BUT FOR HOW MUCH LONGER?

Closures and mergers mean 15% of privately-owned English UK member centres have disappeared since early 2020.

This amounts to a future loss of £214m, over 5,300 jobs and £38m in taxation revenue. This is also a huge loss of expertise and quality, from which it will be difficult to recover.

While it demonstrates the resilience of the sector that more centres have not closed, we fear up to 30% could still disappear without targeted government support.

English UK member centres joined our fight for business rates relief and other retail, leisure and hospitality support grants. It is hard to understand why these UK ELT centres were not specifically included.

MOST UK ELT CENTRES HAD FEW OR NO STUDENTS DURING PEAK PERIODS

ELT is a seasonal industry. Most income comes in spring and summer peaks, with little opportunity to trade at other times. Many centres have had no significant income since summer 2019.

THE UK'S BIGGEST ELT MARKET FACED THE BIGGEST OBSTACLES

In 2019, 54% of our students were under 18: in 2020 this figure fell to 13%.[21] Most attend on short courses, which were heavily impacted by lengthy quarantine requirements.

CONFUSING TRAVEL RESTRICTIONS DISCOURAGED STUDENT TRAVEL

The government's Covid-19 travel restrictions were complex and difficult to understand. Students and their families need reassurance that travelling to the UK is safe. If restrictions are imposed again, they need to be risk-based and easy to understand.

21 Europe Future Outlook 2021, British Council, English UK and Bonard, June 2021

WHAT WE NEED FROM GOVERNMENT

We have the will, the plans and the potential to become bigger and better than before.

If granted, our asks of government will help UK ELT to survive and retain our position as the #1 global destination for students to learn English.

We ask the UK government to support the survival and recovery of UK English language teaching with:

1. TARGETED BUSINESS SUPPORT
2. A SUPPORTIVE IMMIGRATION SYSTEM
3. MARKETING ON A NATIONAL SCALE

WHAT WE NEED FROM GOVERNMENT #1

TARGETED BUSINESS SUPPORT

CREATE CARF 2 AND ASSOCIATED SUPPORT FOR ELT INTO 2023

UK ELT has already missed two peak business seasons and we do not anticipate a full recovery for our sector in 2022.

ELT centres desperately need the extension of existing measures and additional targeted support to keep going into 2023, as full recovery is highly unlikely before then. And, unlike the rest of the tourism sector, UK ELT cannot pivot to serve a domestic market.

At the beginning of 2022, the Tourism Alliance found 81% of language schools had suffered a 50%+ decline in business for December 2021, compared with 52% across the tourism sector. Half reported cancellation rates of over 50% for Q1 2022, compared to 29% across the tourism sector. [22]

As of February 2022, members in just 17 local authorities had been granted business rates relief available to the retail, leisure and hospitality sectors. Unclear guidance led to many English language centres being deemed ineligible by local authorities. This is one instance of UK ELT falling between the education and tourism sectors.

Where ELT centres in England have received support, it has been mostly from the £1.5bn Covid-19 Additional Relief Fund (CARF).

This is currently being distributed by local authorities to businesses that have been adversely affected by the pandemic but that are ineligible for the retail leisure and hospitality Expanded Retail Discount.

However, the government guidance for CARF was written in such a way that many UK ELT centres have been considered ineligible or have received inadequate levels of funding.

22 Financial Impact Survey, Tourism Alliance, January 2022

WHAT WE NEED FROM GOVERNMENT #1

TARGETED BUSINESS SUPPORT CONT.

This lack of relief is a serious issue. Rates are the biggest inflexible overhead for most ELT centres: they tend to occupy large, high street premises, which are more accessible for students and provide the space needed for classrooms and common areas.

In October 2021, after extensive English UK lobbying of peers and MPs, government minister, Lord Greenhalgh of Fulham told a Lords debate enabling CARF: “We will confirm the eligibility of sectors in due course when we publish guidance in the proper way, but certainly the English language teaching sector is one of those that we are looking at very carefully.”[23]

We need the government to create a second CARF scheme for 2022-23 to support the small number of industries, like ours, that have taken a particularly bad hit from the pandemic, and where recovery will come more slowly.

We also request: the extension of Additional Restrictions Grant (ARG) funding, prioritised for businesses that can demonstrate a reduced turnover of at least 60% because of Covid-19 restrictions; more flexibility in the repayment of Coronavirus Business Interruption Loan Scheme (CBILS) loans; and some form of rent hardship scheme.

Without business rates relief, we estimate 30% of UK ELT centres could close for good – a potential future loss of £214m, over 5,300 jobs and £38m in taxation revenue.

This would far outweigh the roughly £10m cost of providing the help needed.

23 Lord Greenhalgh of Fulham, House of Lords, October 2021.

WHAT WE NEED FROM GOVERNMENT #2

A SUPPORTIVE IMMIGRATION SYSTEM

UK ELT's requirements often align with other poorly-understood markets in the tourism sector. We believe with some small tweaks the government could significantly improve our competitiveness.

INTRODUCE YOUTH GROUP TRAVEL SCHEME FOR UNDER 18S AND RESUME LIST OF TRAVELLERS CONCESSION

Under-18s are UK ELT's biggest market. Most come from Europe with organised groups led by responsible adult teachers or guardians. Until October 2021, most travelled on ID cards.

During the debate in the Lords about the loss of ID cards, the government promised that students could instead use the collective passport scheme created in 1961.

It subsequently emerged that of 17 signatories, only two have a mechanism to issue the passports, and the Home Office intends to remove this route.

Our Youth Group Travel Scheme, proposed with the Tourism Alliance and the British Educational Travel Association (BETA), would allow students travelling with teachers as part of an educational group from the EU, EEA and Switzerland for up to six weeks to attend an accredited ELT centre and visit cultural and historic attractions.

The scheme would be open to EU nationals and residents up to the age of 18.

This would allow us to recover and grow our juniors ELT market and take full advantage of educational schemes funded by the EU or EU governments, such as the Italian PON and the upcoming Hungarian project.

We estimate that this would not only generate an additional £1bn of revenue, but would also strengthen international cultural exchange and develop positive relations with the UK.

Without such a concession, we believe many groups and individuals will instead choose to study in Ireland or Malta, competitors within the EU travel area.

A 2019 survey of English UK member centres found almost 90% had received under-18s travelling on ID cards only. [24]

Just over three-quarters had under-14s coming on ID cards, compared to almost 100% of 17- and 18-year-olds. Roughly two thirds said over half of their European juniors travelled on ID cards. [25]

Plus, a youth group travel scheme is supported by the majority of UK adults.

Polling by Deltapoll for BETA in January 2022 found 60% supported the idea of both students and adult leaders of educational groups being able to travel to the UK on ID cards. [26]

Another deterrence to group school travel is that any students in a group who are EU resident but not EU citizens, would often need a visa as well as a passport now the List of Travellers scheme has ended.

24 Young Learners English UK survey, 2019
25 English UK survey of member centres, 2019
26 Deltapoll Survey, BETA, January 2022

SUPPORTIVE IMMIGRATION CONT.

INTRODUCE YOUTH GROUP TRAVEL SCHEME FOR UNDER 18S AND RESUME LIST OF TRAVELLERS CONCESSION CONT.

The BETA research found most respondents also supported allowing under 18 year old EU residents who are not citizens travelling with such groups.

“Introducing a Youth Group Travel Scheme comes at negligible risk to the UK’s immigration policy as the scheme is only open to supervised student groups, which are not a security or economic threat.

The successful introduction of such a scheme would not just save the educational travel industry, it has the potential to generate over £1bn per annum in additional revenue and, over time, will significantly enhance the UK’s soft power.” [27]

“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.” [28]

– Language school owner

“The collapse in the school group market is unnecessary as schoolchildren present no security risk, will not disappear into the black economy..., and parents who let their children go on school trips are generally quite keen for their teachers to bring them back home.

“This is an obvious situation where the government needs to set aside its dogma on passports and work with the industry to find a practical solution.” [29]

– Kurt Janson, director of the Tourism Alliance

27 Deltapoll Survey, BETA, January 2022
28 English UK survey response from a language school owner, 2019
29 40,000 jobs at risk as foreign pupils shun UK language schools, The Observer, 17 April 2022

WHAT WE NEED FROM GOVERNMENT #2

SUPPORTIVE IMMIGRATION CONT.

EXTEND THE YOUTH MOBILITY SCHEME TO EU/EEA AND SWITZERLAND

This could be done through a series of bilateral deals and would have advantages of making the UK a more attractive place to study English and potentially helping bridge short-term staffing problems for the industry while we train up new specialist staff lost when we left the EU.

We urge the government to be proactive on negotiating youth mobility agreements and consider very high caps for EU students and countries already in the system, such as Japan.

ENABLE STUDENTS ALREADY STUDYING IN THE UK TO APPLY FOR A NEW VISA FOR FURTHER STUDY WITHOUT LEAVING THE COUNTRY

Competitor nations allow students to apply for a visa covering several stages of study without the need to return home and reapply.

This concession was granted on a temporary basis to students in the UK during the first national lockdown.

Making this concession permanent would make the UK a more attractive destination, especially if we allow those arriving on a visitor visa to apply for a student visa route without having to leave the UK to do so.

WHAT WE NEED FROM GOVERNMENT #2

SUPPORTIVE IMMIGRATION CONT.

ALLOW PROVIDERS OF COURSES BELOW RQF 4 TO REGISTER WITH THE OFFICE FOR STUDENTS

This would enable UK ELT centres with a solid track record of visa regulations compliance to offer some limited work rights for students, as universities currently do. Our competitors offer work rights to adult ELT students and this would bring us into line with their offer, but without compromising on rigour.

REQUIRE ALL ENGLISH LANGUAGE PROVIDERS TO BE ACCREDITED AND RECOGNISE ACCREDITATION UK ON ALL VISA ROUTES

Through rigorous accreditation, the UK has led the way on raising ELT standards.

All UK ELT centres should be accredited and Accreditation UK should become an educational oversight provider, being accepted on the sponsored visa route as well as short-term study and visitor routes. This would enable our centres to offer a wider range of courses, allow students to renew visas in-country and generally create a more competitive UK offer.

This makes sense because Accreditation UK is the only UK inspection framework focusing on ELT and raising standards within the industry. It has a global reputation as the world's oldest ELT inspection and accreditation scheme.

SUPPORT ELT CENTRES TO RECRUIT THE QUALIFIED SEASONAL STAFF THEY NEED

ELT is a seasonal industry that needs large numbers of qualified staff for short summer peaks. Schools have previously recruited qualified EU staff to complement their UK-based staff. Now, most of our members report staff shortages, some of which may be difficult to address in the short term.

Therefore, once the recovery is underway, an uncapped youth mobility scheme for EU, EEA and Swiss national would help teaching centres to recruit the qualified staff they need.

RESTORE WORK RIGHTS OF UP TO 20HRS A WEEK FOR ADULT STUDENTS ON ELT COURSES WITH ACCREDITED PROVIDERS

This would bring the UK in line with major English language competitor nations. It makes study in the UK more attractive, as students can practise their language skills in the workplace and gain valuable experience and life skills. It would also help attract European students accustomed to freedom of movement rules.

Since student migration routes were tightened, there have been few or no instances of people failing to return home or breaking the terms of their study in the UK.

The UK faces a significant disadvantage compared to its competitors. We seek the restoration of work rights for ELT students across the spectrum of providers.

ENSURE CLARITY IF TRAVEL RESTRICTIONS ARE IMPOSED

Students and their families need reassurance that travelling to the UK is safe, and clear timely information about requirements.

If restrictions are imposed again, we need a risk-based, tiered structure of location-specific travel restrictions based on clear and transparent data.

WHAT WE NEED FROM GOVERNMENT #3

MARKETING ON A NATIONAL SCALE

UK ELT needs support to restore market confidence and make the most of opportunities for growth. We need clear, consistent and positive messaging led by government.

DRIVE AND MEASURE SUCCESS BY SETTING A NATIONAL GROWTH TARGET FOR ELT STUDENTS IN THE UK

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

Targets for the UK HE sector should be joined by ambitious targets for all parts of the UK's international education system, including ELT.[30]

FINANCIAL SUPPORT FOR OUR ENGLISH WITH CONFIDENCE CAMPAIGN, COMMUNICATING THE UK ELT OFFER

In 2021 English UK initiated, created, led and funded the English with Confidence campaign using GREAT branding.

It includes a website, shareable collateral and social media posts, which provide unified, reliable and reassuring information about studying English in the UK after Brexit and during the Covid-19 pandemic.[31]

We have been grateful for support from the Department for International Trade and the British Council, enabling us to share information through their networks, but urgently need funding so the project can expand to meet the needs of our sector and target priority audiences for recovery and growth.

30 International Education Strategy: 2021 update, Department for Education/Department for International Trade, February 2021
31 See campaign website: www.study.englishuk.com

WHAT WE NEED FROM GOVERNMENT #3

MARKETING CONT.

MAKE GREAT FUNDING AVAILABLE FOR UK ELT IN KEY SOURCE MARKETS

This will support promotional campaigns targeting partners, buyers, students and their influencers, including increased support for Ministerial and Export Champion-led trade missions to key markets where specific barriers to trade have been identified.

INCREASE AVAILABLE FINANCIAL SUPPORT FOR EDUCATION EXPORTERS THROUGH SCHEMES INCLUDING THE UK TRADESHOW PROGRAMME

We need access to the UK Tradeshow Programme and similar schemes, with more flexible eligibility criteria.

For example, the programme should be available to organisations relaunching export activities or extending them to new markets, as well as those who have not previously attended an overseas exhibition or conference.

This would enable ELT centres with no marketing budget to attend key events and visit overseas partners, ensuring the visibility of Brand UK.

TOP UP THE DEPARTMENT FOR INTERNATIONAL TRADE'S INTERNATIONALISATION FUND

This £38m fund, supporting 7,600 SMEs via match-funded grants, has exhausted its allocation in some areas. We want another £38m, so more SMEs can benefit.

HELP US REPLACE VALUABLE ERASMUS+ RELATIONSHIPS

We call on the government to commit resources to the negotiation of global bilateral deals enabling participants to travel to the UK for vocational, educational and training programmes that will replace revenue lost as a result of leaving Erasmus+. For UK ELT, this is estimated to be at least £7m per annum.

ENGLISH UK

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