

# Global opportunities

How government can support the  
UK English language teaching sector

English UK Position Paper / May 2025



English is the lingua franca of global trade. Many international businesses use English as their official language of communication.

Language proficiency can have a positive impact on employability, as well as on social and international mobility, and is without question a key driver behind the desire to learn English for many people.



– The Future of English: Global Perspectives, British Council, 2023

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Inbound visitors who take an English language course, VisitBritain, 2020



# Introducing the UK English language teaching sector

In these uncertain times, the UK needs strong export industries and ways of forging positive links with the wider world. English language teaching (ELT) provides both.

The UK ELT sector supports 40,000 jobs all over our country, contributes £1.8 billion to our national finances, feeds our universities and builds lifelong global affinities to the UK.

We transform lives through learning and intercultural understanding. Our sector attracts children, students, professionals and older adults to study and experience life in the UK.

Students come from all over the world to continue their educational or career journeys, while enjoying cultural immersion and leisure.

On average, teenage students stay for less than a fortnight and adults stay for under six weeks.



**40k+ jobs**  
supported by UK ELT



the UK ELT sector contributed  
**£1.8 billion**  
to the UK in 2024





# UK ELT in context

New research has found that each ELT student added an average of £3,650 to UK finances in 2024, 15% higher than a decade ago.

In the same period, jobs supported by UK ELT rose to over 40,000 and taxes paid to £295 million – both increasing by 12%.

And we could contribute even more.

The UK was a pioneer and leader in the global English language teaching industry. Yet, despite our best efforts, recovery from the pandemic has been slower than that of competitors due to the end of passport-free EU travel, which undermined our largest market.

What's more, the global market for ELT is being disrupted by new technology, such as AI-supported language learning.

Growing domestic ELT supply in some source markets and new, emerging destinations for study abroad, including Dubai and the Philippines, are also important disruptors.

With hard work and innovation, UK ELT centres have regained 71% of pre-pandemic business and, in 2023, attracted 37% of all students studying abroad for ELT.

We are the world's most popular ELT destination but slipped from 2nd to 3rd place (behind Australia and the USA) for volume as we attract more short-stay teens and fewer adults.



Growing the UK economy is the government's number one priority, and ELT can help.

To fully play our part, we need the government to work with our industry and other stakeholders.

We need a better operating environment, more agile immigration and more extensive promotional support.

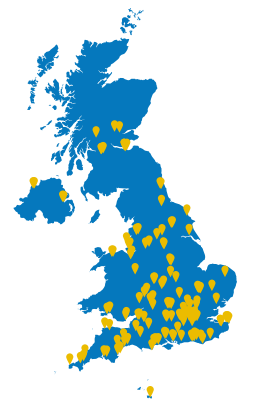
We are ambitious. We want to do more for our industry, and for our country.

We want the UK to become the world's biggest English language learning destination once more.

The six simple, supportive government policies that we outline in this document for will enable us to do that.



**£295 million**  
raised in UK tax via  
UK ELT jobs in 2024



with 100+ locations,  
**ELT benefits  
the whole  
country**

# What English language teaching does for the UK

## 1. UK ELT supports one of the UK's most successful exports

More people communicate using English than any other language, with roughly 2.3 billion people speaking it as a first or additional language.

English will remain the dominant global language for the foreseeable future.

Thanks to Accreditation UK, our quality assurance scheme run in partnership with the British Council, English UK member centres enjoy a global reputation for quality.

## 2. UK ELT helps to build international relationships

At a time of rising international tension and uncertainty, creating personal connections across borders is vital.

In 2023, students came from over 100 different countries to learn or improve their English. 80% liked the UK so much, they hope to return for a holiday or further study.

As we embark on an era of new trade deals, ELT-friendly offers like YMS could help build relationships.



students from  
**100+**  
countries  
visited the UK to study  
English in 2023

**80%**   
**hope to return**   
to the UK for travel  
or further study



## 3. UK ELT creates jobs and supports local economies throughout our nation

ELT centres are based all over the UK, with hotspots in London and the South East as well as the South West and North West, Scotland, Yorkshire and the West Midlands.

The highest ELT tax take was £3 million in the London borough of Camden, followed by Bournemouth and Brighton and Hove, each contributing £2 million.


Direct employment and financial benefits created by ELT are concentrated around teaching centres, while the indirect gains are widespread.



Our sector supports 40,320 full time equivalent jobs in the UK, up 12% in a decade.

We are attracting fewer, more affluent students, each worth around £3,650 to the UK, a rise of 15%.

As well as specialist ELT staff, we also support jobs in tourism, leisure, hospitality, travel and retail, as well as people hosting students in their homes.

ELT students spend almost twice as much as ordinary tourists.

  
**ELT students spend 2x**  
more than other tourists

  
 **3,650 added**  
per ELT student to UK finances in 2024



“

Students benefit from coming to the UK, and we benefit from them being here... My passion is for an open, global Britain – one that welcomes new ideas. One that looks outward in optimism, not inward in exclusion.

Students come and build bonds with their classmates – and friendships between students become friendships between countries. That’s what education is all about.

A force for good in people’s lives, a force for good in our world. A generation of young people who have studied abroad and cultivated friendships with people from different cultures – those ties make the world a safer, more vibrant place.

”

– Secretary of State for Education Bridget Phillipson, Embassy Education Conference, 23 July 2024

# What English language teaching does for the UK

## 4. UK ELT is a route to UK universities for international students

International education, and universities in particular, are a significant UK export industry, contributing £27.9 billion in total revenue to the UK in 2021. 77.9% of this was accounted for by the higher education sector.

Many students start their journey at our ELT centres, either as teens enjoying their first experience of the UK or young adults preparing for their degrees.

## 5. UK ELT is an invaluable service for staff joining our NHS

Our language teaching centres teach and test medical English for healthcare professionals new to the UK, helping our NHS grow to meet patients’ needs.

## 6. UK ELT is a highly valuable export industry for the nation

UK ELT was badly affected by the end of freedom of movement.

Despite this, the sector contributes £1.8 billion to our national economy, and is a vital part of our visitor economy.

# What do we need? Our six policy recommendations

Our policy recommendations cost little to implement, and will help UK English language teaching thrive and reap benefits, including increased exports, jobs, gross added value and closer international relationships.



1.

Expand career-enhancing travel opportunities for young people via YMS



2.

Extend ID card travel for EU school groups



3.

Recognise UK ELT's accreditation scheme for student visas



4.

Better support the growth of UK ELT



5.

Increase rent-a-room tax relief to preserve UK ELT's unique offer



6.

Create exchange programmes for young professionals

“

...in order to remain competitive, the UK must better harness its appeal as a visitor destination, especially given that evidence shows that visitors who study English language as part of their trip to the UK spend twice as much and stay longer than those who do not.

VisitBritain, VisitEngland, VisitScotland and Visit Wales, as well as local tourism and visitor economy bodies should be actively engaged with the ELT sector through English UK and the Department for Business and Trade to better understand how they could support the opening of new markets and optimise recruitment from existing markets. This would include the emerging and growing market of ‘educo-tourists’ seeking to combine language study with travel.

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– Examining the Economics of the English Language Teaching Industry, Pragmatix Advisory, March 2025

# 1. Expand career-enhancing travel opportunities for young people via YMS

Youth Mobility Schemes (YMS) offer young adults the chance to live, work and study in another country for up to three years.

Expanding their range and scope would benefit British youth, inbound tourism and UK exports. YMS is also an integral part of UK soft power networks.

Agreements exist with 12 countries plus a separate scheme for India. Caps for Japan and Korea were recently raised and two new schemes created.

UK ELT supports key growth areas through YMS by ensuring young adults filling job vacancies in industries such as tourism and hospitality have the appropriate language skills.

## Our asks

We want an EU/ EEA/ Switzerland Youth Mobility Scheme.

The government has said there will ‘be no return to freedom of movement’, but YMS is entirely different. It is a time-limited once and done reciprocal visa scheme only available to young people in participating countries.

A 2025 Best for Britain poll found 81% of Labour voters support a two-year YMS, including two thirds of Con-Lab switchers. 74% support a four-year YMS, including half of Con-Lab switchers.

We also want the UK to reach agreements with other countries, for instance in Latin America.

The UK has a significant opportunity to grow its market share of 7% in Latin America.

The first YMS in this region was agreed with Uruguay in 2023.

We want to see more follow with other countries in this potential growth market.

# 2. Extend ID card travel for EU school groups

The post-Brexit requirement for passports – and in some cases visas – has made the UK uncompetitive against EU destinations, including Malta and Ireland.

Numbers declined by 81% between 2019-2022, compared to 53% for groups travelling to EU destinations. The need for passports was cited as the main reason for decline.

Our campaigning encouraged the government to reinstate ID-card travel for French school groups to the UK and a pilot is underway to streamline entry at Dover.

Students with EU/ EEA/ Swiss identity cards studying at French schools can travel as a group of five or more without a passport. Classmates of other nationalities can use their passport without a visa.

## Our ask

We want ID card travel extended to school group visits from other EU countries, including Spain, Germany and Italy.

There is no risk that organised and supervised groups of school children would fail to return home.





### 3. Recognise UK ELT's accreditation scheme for student visas

Accreditation UK, a rigorous and specialist ELT accreditation scheme run by the British Council in partnership with English UK, is widely recognised as the world's best.

This is why it is the most popular accreditation scheme among UK ELT centres.

Despite this, centres offering Student Visas must be inspected by ISI, an independent school specialist. Many centres pay for both schemes.

#### Our ask

We want the government to recognise Accreditation UK for Student Visas.

This will ensure our learners have the best possible experience and avoids unnecessary costs for language centres.

### 4. Better support the growth of UK ELT

International education is an important UK export and ELT serves both as an entry point and a significant segment of the industry.

The UK has a large share of the global ELT market in Europe (41%) and the Middle East (42%).

We also have notable opportunities for growth in Asia (9% market share) and Latin America (7%).

With the right support from the government, UK ELT can maintain its leading market position in Europe and the Middle East, and significantly grow its market share in Asia and Latin America.

#### Our asks

We want to harness the government's reach, contacts and resources to help UK ELT support existing markets and develop new ones.

The UK ELT sector should be recognised in the government's International Education Strategy, with a commitment to support English UK's growth target for the sector of £2.25 billion GVA by 2030 through dedicated campaigns in priority markets for ELT.

We also want financial support from the government for vital promotional activities.

These include hosting familiarisation trips to different regions to showcase the UK offer, and trade missions, trade shows and overseas events to help UK ELT consolidate existing markets and develop new ones.

UK ELT is an important part of the UK's visitor economy. To maintain and grow our global market share, we need the government to commit funding to destination marketing through national tourism bodies such as VisitBritain and major international campaigns including GREAT.



## 5. Increase rent-a-room tax relief to preserve UK ELT's unique offer

Homestay accommodation is popular with ELT students, who want to immerse themselves in UK culture and the English language.

Since the pandemic, demand has often outstripped supply as many spare rooms were turned into home offices or AirBnB lets. The high cost of living and increasing numbers of young adults living at home with their parents are also factors.

Students get a truly immersive experience in homestay accommodation. There is evidence that those in homestays are more fluent speakers at the end of their courses than students in other accommodation.

Homestay hosts experience different cultures and earn money from their spare room, a valuable source of income in a cost-of-living crisis.

### Our asks

We want rent-a-room tax relief increased to £10k from £7.5k, roughly in line with inflation.

Increasing the rate of rent-a-room tax relief for the first time since 2016 would encourage more people to open their doors to ELT students.

*“The uniqueness of the UK’s ELT sector is its ability to blend cultural competence and language learning in an immersive environment. However, a sharp increase in domestically delivered and digitally-enabled learning opportunities threaten the UK’s ability to continue to rely on this USP to drive demand.”*

– Examining the Economics of the English Language Teaching Industry, 2025

## 6. Create a reciprocal exchange programme for young professionals

The replacement of Erasmus+ with Turing means British students and academics can travel abroad on funded programmes but there is no reciprocal mobility into the UK.

This means a significant loss of global trade, soft power and cultural exchange opportunities as well as language school business. There was a significant market in vocational and teacher refresher programmes.

### Our ask

We want the government to negotiate bilateral and multilateral exchange programmes as part of trade negotiations with global partners.








English UK is the trade association for British Council accredited English language teaching (ELT) centres.

We have over 300 members in the private and public sectors, all meeting the rigorous standards demanded by our compulsory accreditation scheme.

We support them with training, advice, international marketing and by campaigning for our industry.

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