



UK ELT Sector Action Plan consultation findings

Summary
July 2026



Introduction

- English UK ran this consultation to test, validate and strengthen the draft UK ELT Sector Action Plan (SAP)
- This short summary shares the headline findings and explains how the input informed the revised SAP, ensuring it reflects the priorities, delivery challenges and opportunities identified across the wider ELT sector
- The findings are perception-based and should be read as a temperature check rather than a representative statistical survey of the whole sector
- The consultation received 62 responses from across the sector. Thank you to everyone who contributed
- Once published, English UK will share the SAP with members and stakeholders



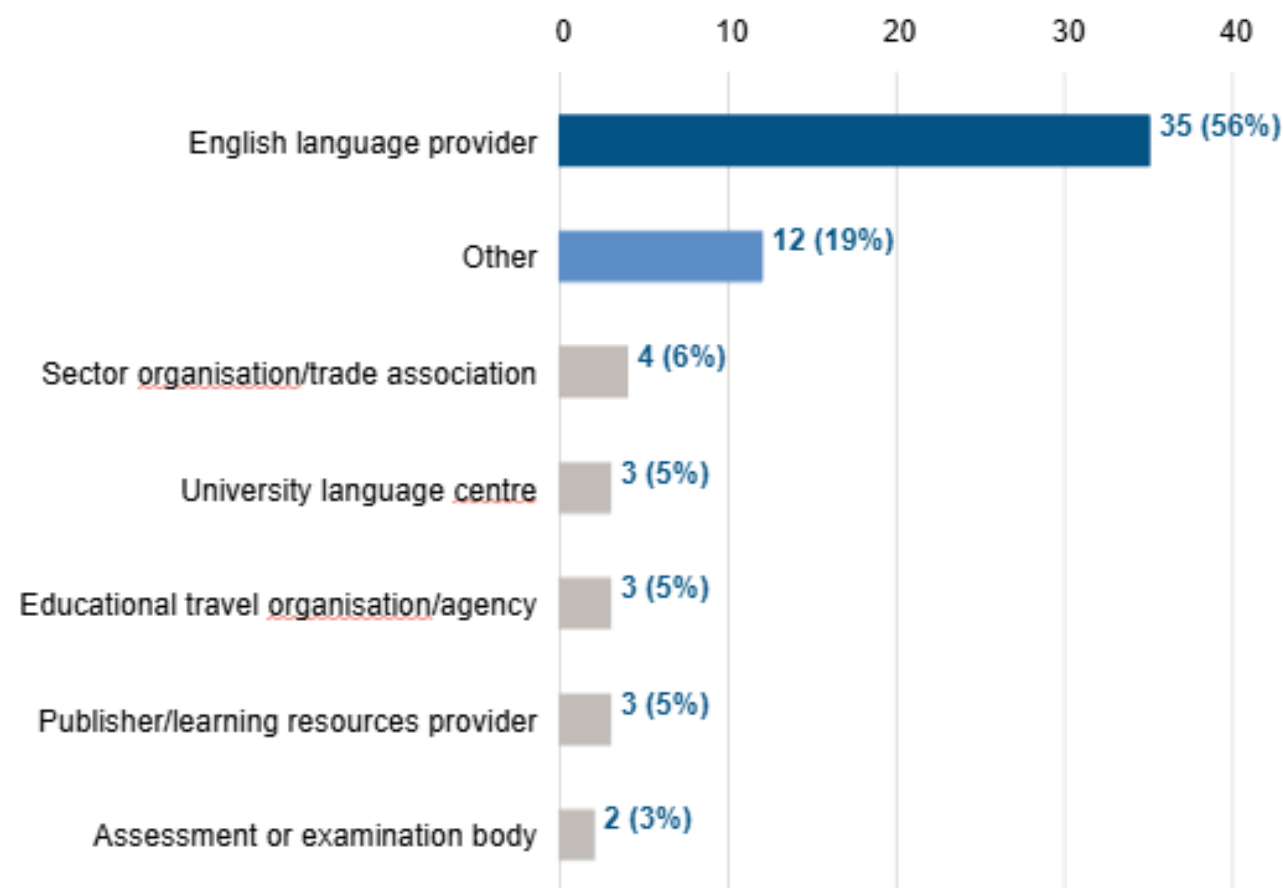
Who contributed to the consultation

Respondent profile (62 responses)

- English language providers accounted for 56% (with 35 responses)
- Other categories included: sector bodies/trade associations, university language centres, educational travel organisations, accommodation providers, publishers and assessment bodies
- The mix confirms input from beyond English UK membership alone, including partners across the wider ELT ecosystem
- The following slide shows the respondent breakdown in more detail

Who contributed to the consultation

62 responses





Awareness of International Education Strategy (IES)

Respondents' familiarity with the Government's 2026–2030 IES was mixed:

Level of familiarity with the Government's 2026–2030 IES prior to receiving the survey:

- 34% were not aware of it before
- 31% were aware of it but had not read it
- 35% were aware of it and had read it

While awareness was relatively widespread, detailed engagement was more limited, suggesting a need to continue explaining how the SAP connects to the wider IES framework

Headline findings

The consultation gave a clear direction of travel for refining the ELT SAP

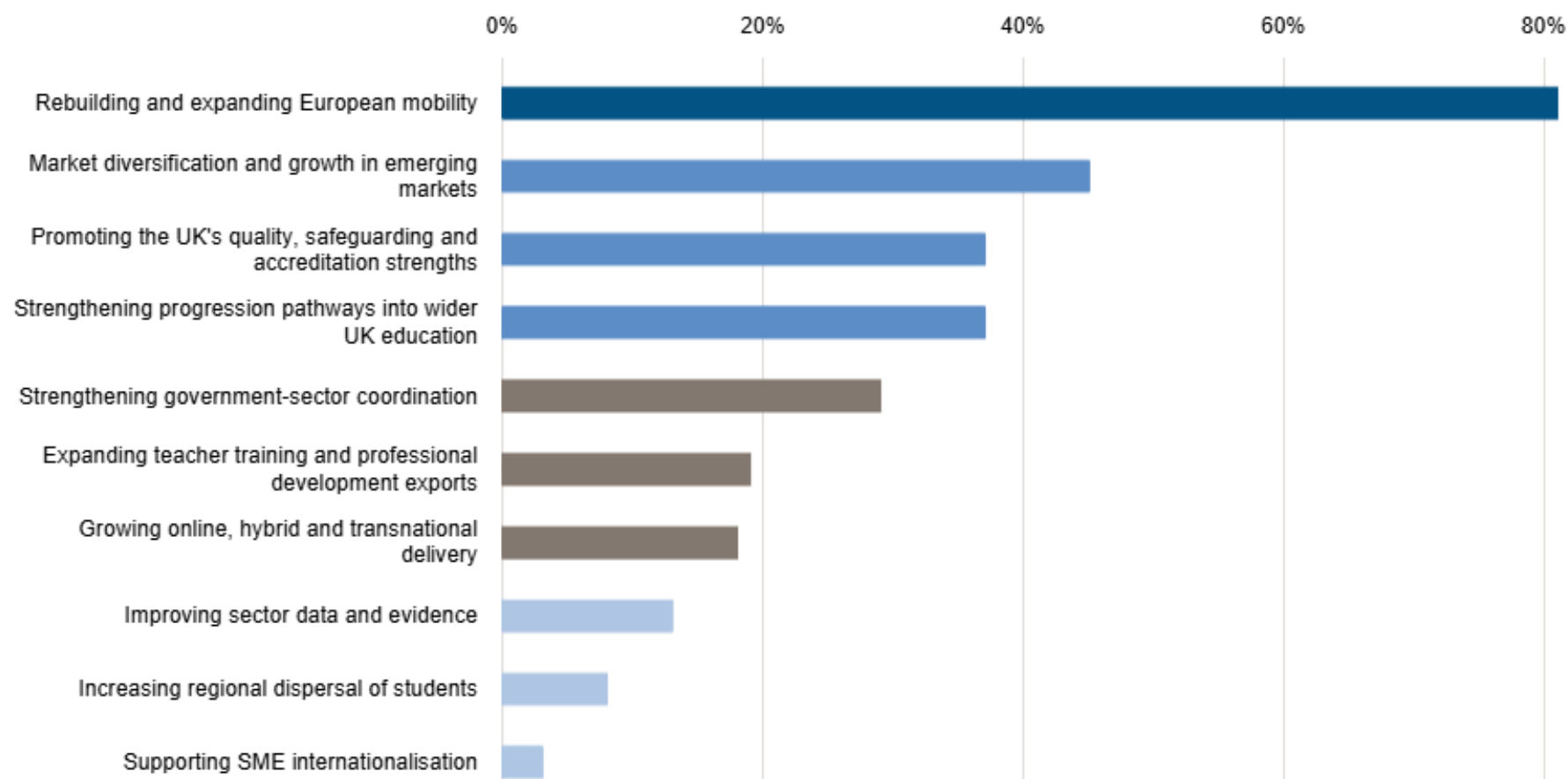
- 1. European mobility was the clearest growth priority:**
50 respondents selected rebuilding and expanding European mobility as having the greatest positive impact by 2030; Europe was also the highest-priority region
- 2. Visa confidence and welcome messaging dominated barriers:**
52 respondents selected international perceptions of UK visa policy as one of the most important barriers
- 3. The responses suggest a balanced approach to source markets/regions:**
Europe first as a recovery and mobility priority, while retaining diversification across GCC, Latin America, East Asia, Southeast Asia and Central Asia

Headline findings

4. **The SAP direction was broadly supported, but needed sharpening:**
38 respondents said the draft reflected opportunities very or quite well, while 24 selected partly or below
5. **Delivery confidence was cautious:**
Only three respondents were very confident that actions would be realistic and achievable by 2030; 30 were neutral
6. **Open comments suggested strengthening practical enablers:**
Themes included accommodation capacity, quality assurance, junior educational travel, data, progression routes and government delivery support

Priorities with greatest positive impact

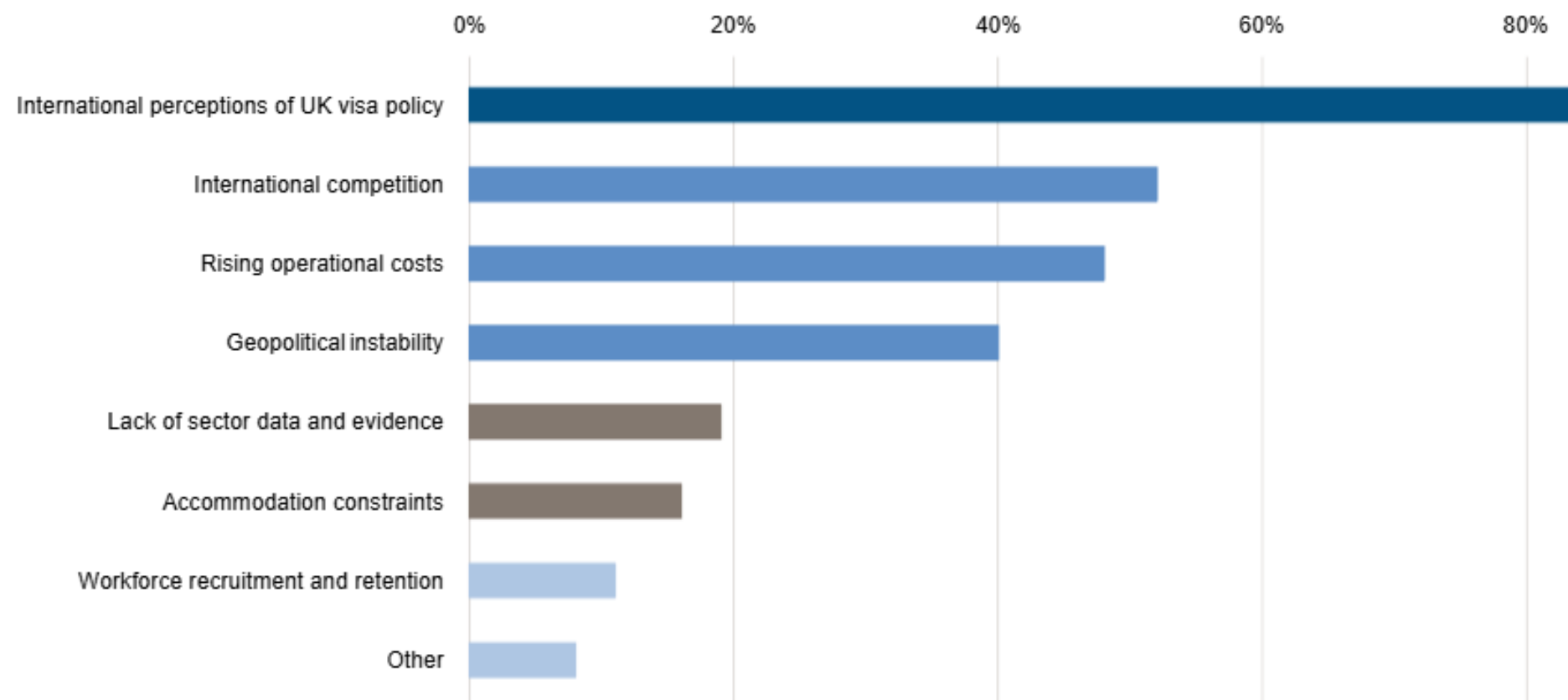
Respondents selected all SAP areas they felt would matter most by 2030



Scale shows percentage share of 62 responses

Most important barriers to address

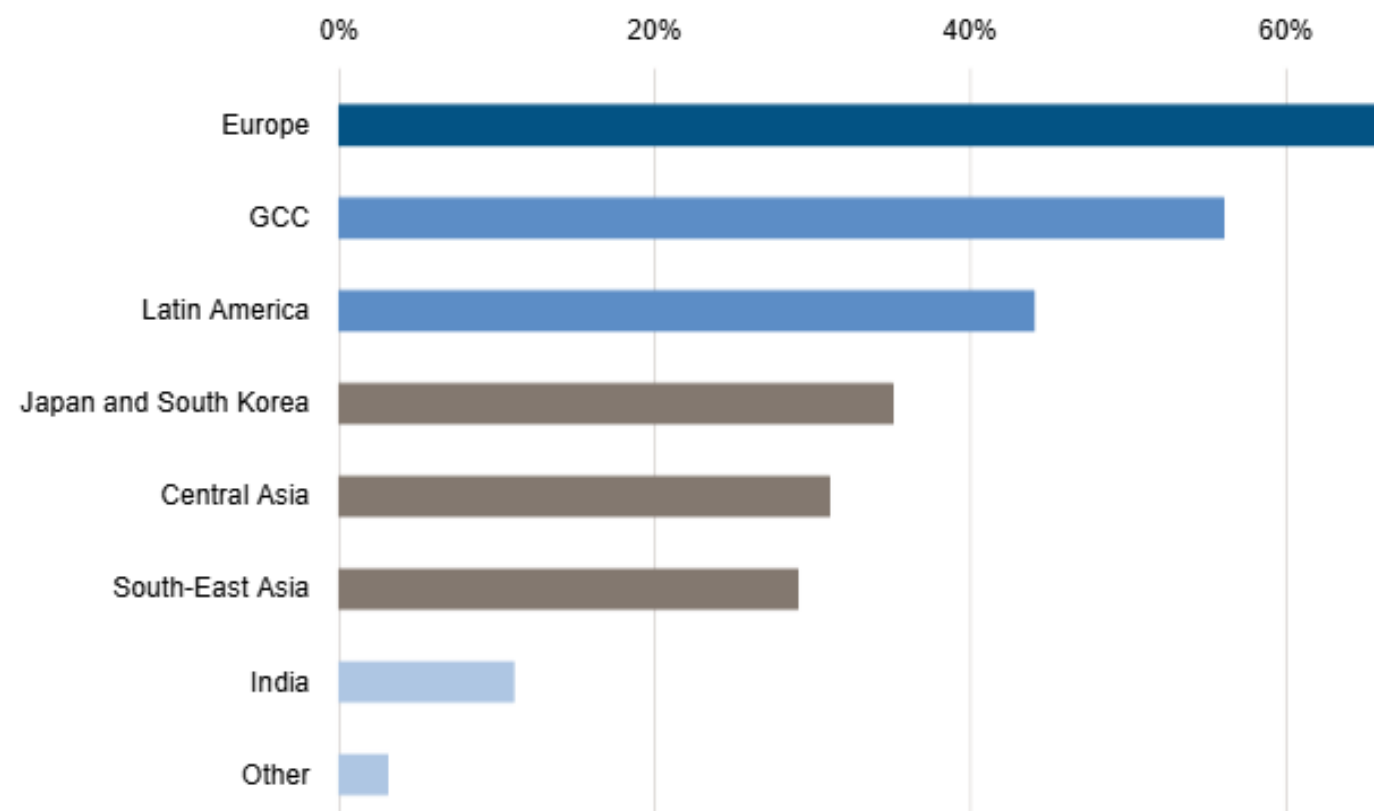
The strongest signal related to perceptions of UK visa policy 84% (52 responses)



Scale shows percentage share of 62 responses

Priority markets and regions

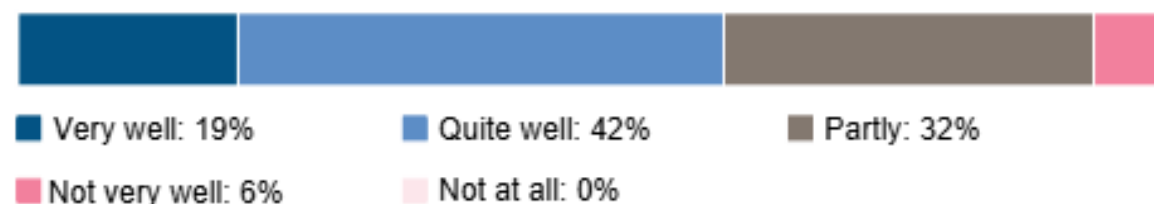
Europe led the market priorities, followed by GCC and Latin America



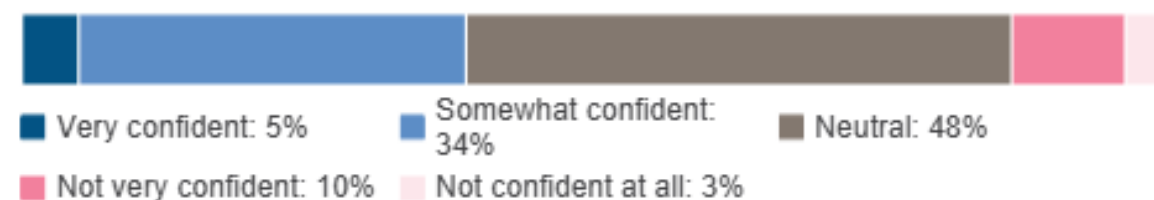
Scale shows percentage share of 62 responses

Support for the draft and delivery confidence

How well did the draft reflect opportunities?



How confident were respondents about delivery?



Stacked bars show percentage share of 62 responses

What the findings mean for delivery

The SAP was broadly supported, but its achievability relies on practical support

- The draft had a strong base: 61% said it reflected opportunities very or quite well
- Confidence about delivery was more cautious: only three respondents were very confident that the actions were realistic and achievable by 2030; most were either neutral or only somewhat confident
- A recurring concern in responses was whether the proposed actions are realistic without stronger government support, funding, coordination and international promotion
- The final SAP, therefore, connects ambition with clearer delivery mechanisms, government-sector coordination and measurable reporting



What members and partners told us

Recurring themes from open-text responses

- **Welcome, visas and confidence**
Respondents repeatedly called for clearer visa messaging, easier and more predictable processes for genuine students, and stronger confirmation that international learners are welcome in the UK
- **European mobility and youth travel**
Many responses focused on rebuilding European mobility, school groups, junior travel, ID card and youth mobility arrangements, and renewed exchange opportunities
- **Practical growth infrastructure**
Accommodation capacity, homestay recruitment, safeguarding, welfare, staffing and operational pressures were seen as essential to sustainable growth



What members and partners told us

Recurring themes from open-text responses

- **ELT as a gateway sector**
Respondents highlighted progression from ELT into schools, FE, HE, vocational education, skills and employment pathways
- **Quality, safeguarding and trust**
Respondents framed quality assurance, Accreditation UK, safeguarding and learner welfare as the basis for international trust and UK competitiveness
- **Evidence and delivery support**
Open responses stressed stronger data, market intelligence, government coordination, export support and annual reporting

How the consultation shaped the final SAP

The consultation showed a reasonably strong consensus around the existing draft.

Respondents mainly asked for sharper emphasis on issues they prioritised, rather than a different strategy.

The revised SAP now gives stronger emphasis to the following areas:

- **Visa confidence and welcome messaging**
Strengthened as a central delivery priority, rather than only a delivery barrier
- **European recovery and youth/group mobility**
Rebalanced market priorities, with Europe even more prominent as a core market and mobility strand
- **Accommodation capacity as strategic infrastructure**
Positioned as essential growth infrastructure rather than only an operational constraint



More ways it shaped the final SAP

- **Data and evidence for advocacy**
Linked more directly to advocacy, policy influence and annual ESAG reporting
- **Quality assurance and safeguarding**
Framed as a core enabler of trust, competitiveness and student protection rather than simply a promotional message

The post-consultation SAP also:

- strengthens the narrative about ELT as the gateway into wider UK education exports
- gives greater prominence to junior ELT and educational travel
- recognises the need for resilience planning against future policy, market and geopolitical shocks



Thank you to all consultation contributors

Their input helped strengthen the evidence base and shape a more practical, better-informed ELT Sector Action Plan