

UK ELT: an update

English UK briefing for
East Asia Agents
2 March 2023

What we will cover



- Introducing English UK
- UK ELT at a glance
- Why chose the UK
- English with Confidence campaign
- Upcoming events and activities



English UK: who we are



- The national association of accredited English language teaching centres in the UK.
- **Our mission:** to harness the collective energy of our membership to champion and advance UK ELT.
- **Our vision:** for a UK English language teaching sector that transforms lives through learning and intercultural understanding.
- **Our values:** Community, inclusivity, integrity, responsibility, and sustainability.



UK ELT before the pandemic



- The UK attracted 550,000 ELT students annually
- Around half from Europe and in 2019 over half (54%) of those were juniors (students under 18 years old)
- According to VisitBritain research – UK ELT students spend twice as much money in the UK and stay three times as long as other inbound visitors.



Impact of the pandemic



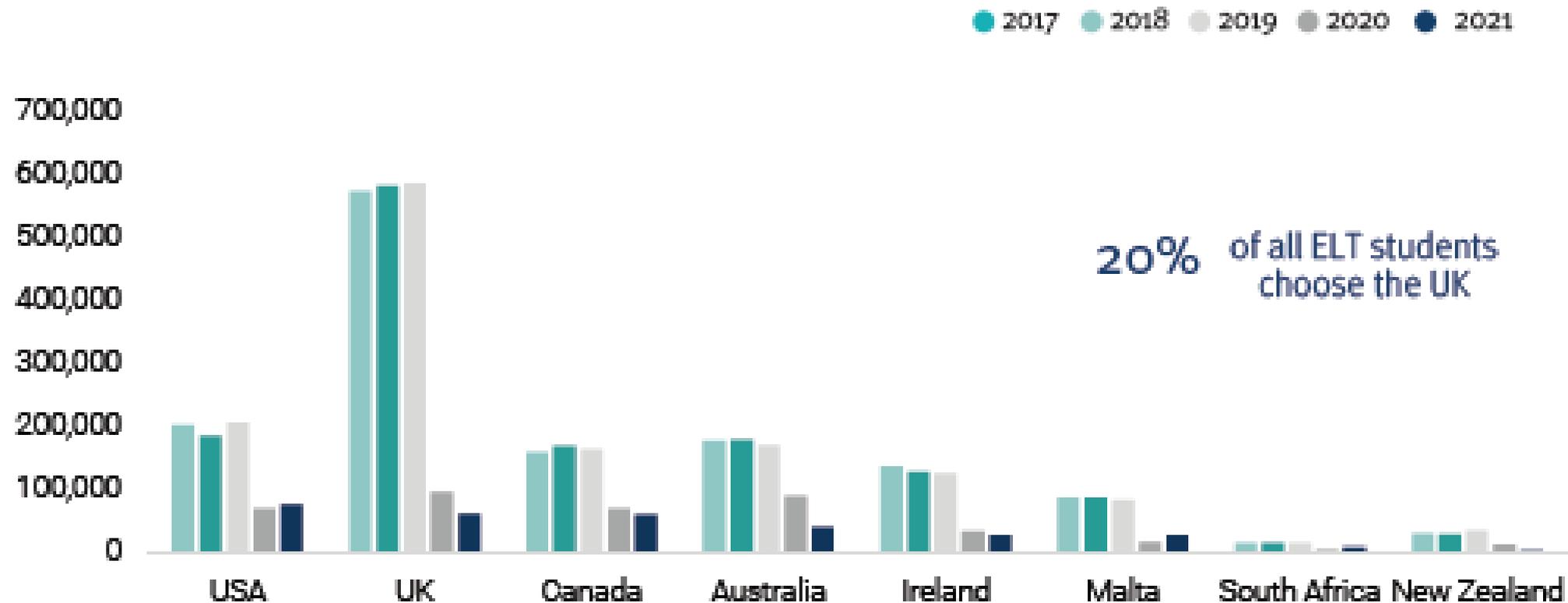
- 2021 showed a 36% drop in student numbers from 2020, which was already 84% down on 2019
- Between 2019 and 2021, the sector experienced an 88% drop in student numbers and 71% decrease in student weeks
- In 2021, the UK lost its position as biggest English language teaching destination in the world.



Student statistics: global context



UK ELT's performance in the global context (2017-2021)
English language students by destination



UK ELT today



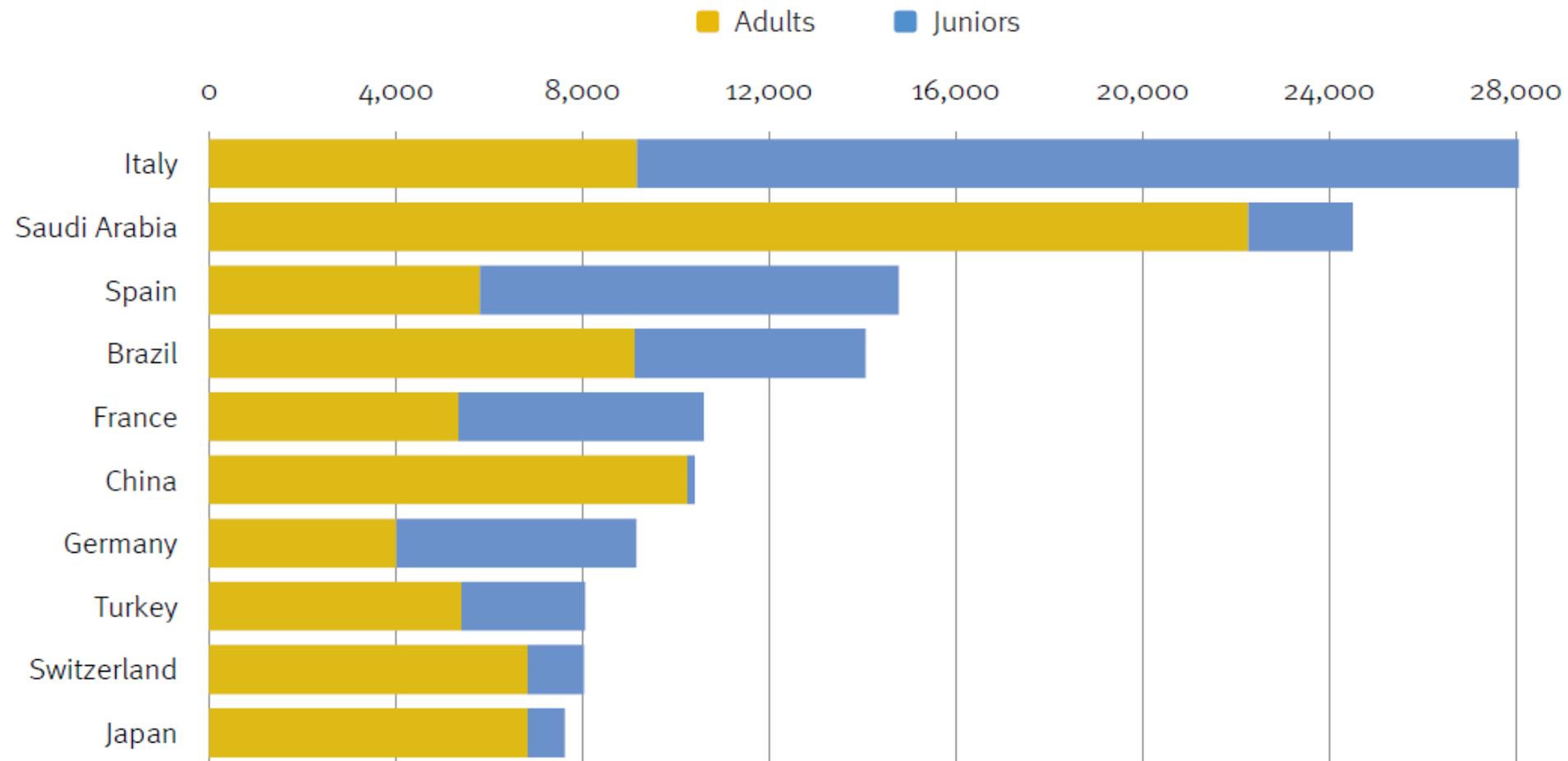
- Life in the UK 'back to normal'
- Resilience - over 85% of English UK member centres have survived and are welcoming students
- UK ELT sector on gradual recovery trajectory throughout 2022: Q1 ~55%, Q2 ~70%, Q3 ~55% & Q4 ~56% (of 2019 pre-pandemic volume)
- Summer 2022 - first strong rebound seen in junior segment
- The top ranked source markets now largely reflect pre-Covid ones, China and Russia the notable absences.



Student statistics: Q3 2022



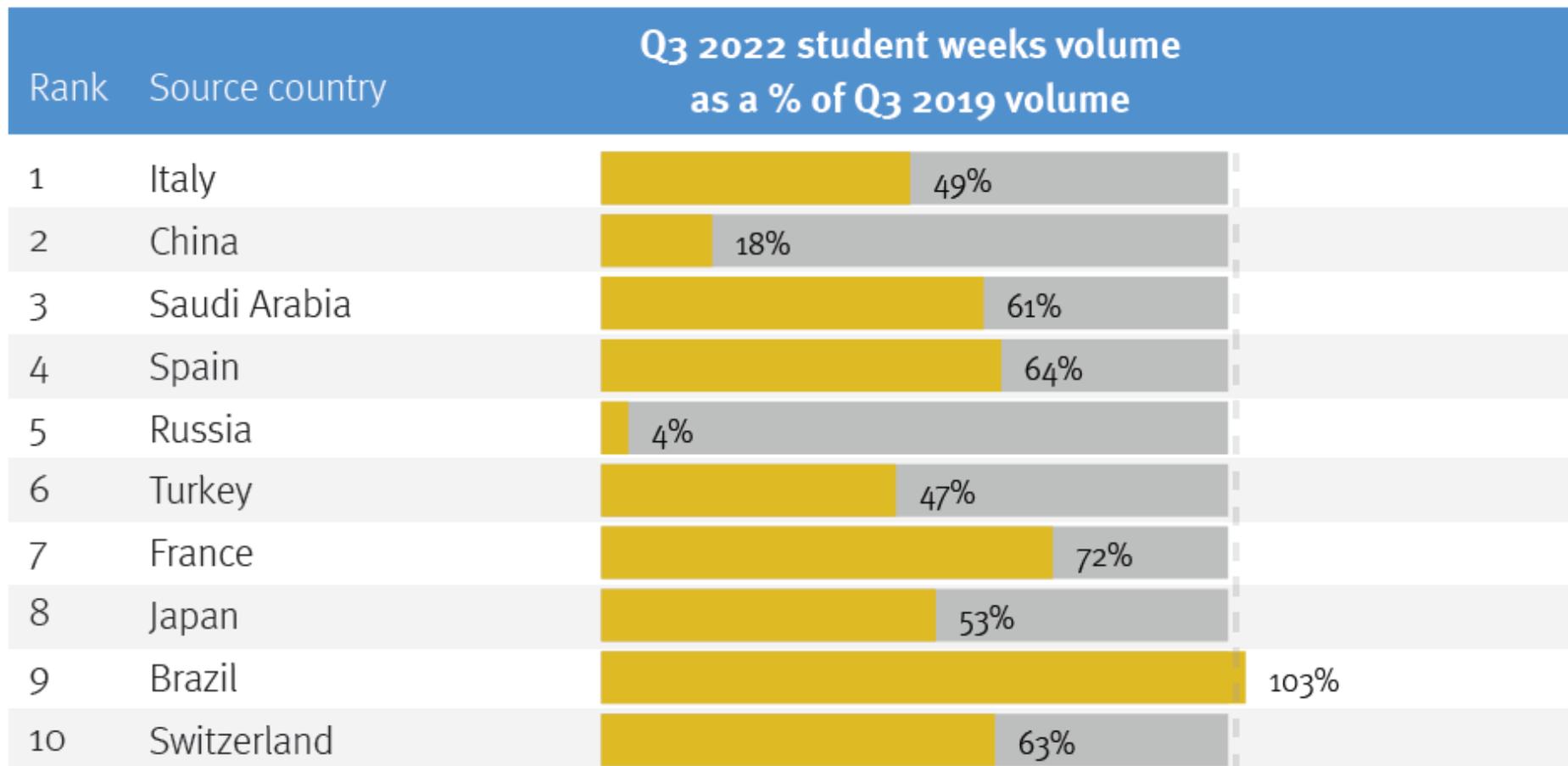
Overall top markets and student weeks (with age group breakdown)



Student statistics: Q3 2022



Top 10 source markets (2019) and their recovery levels

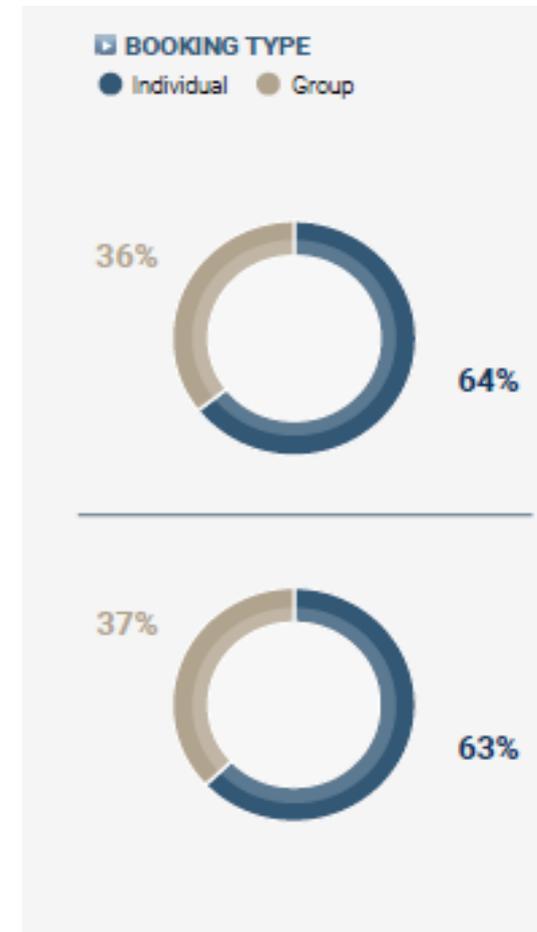
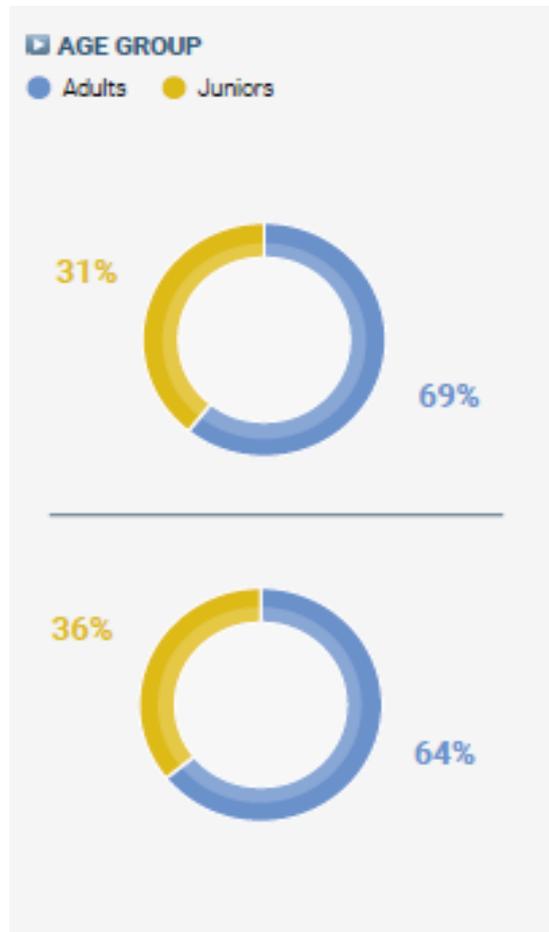


Student statistics: market structure

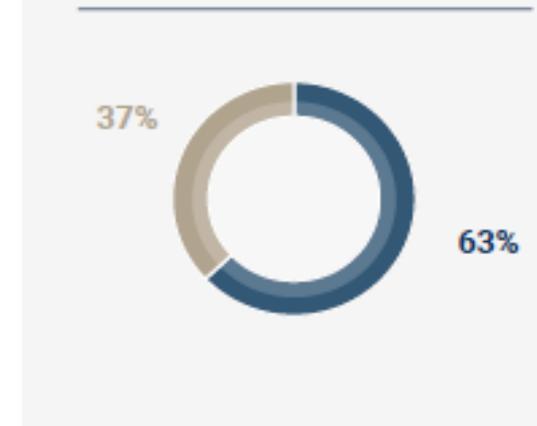
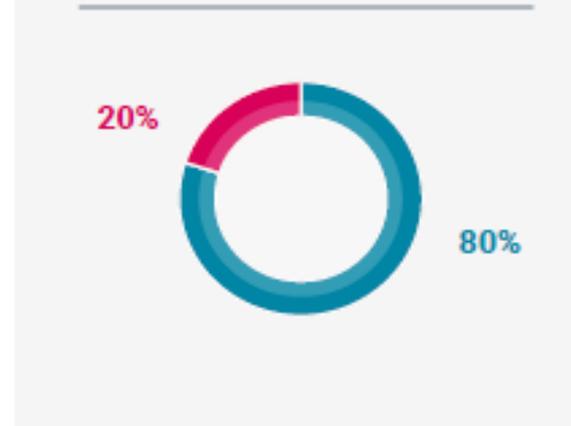
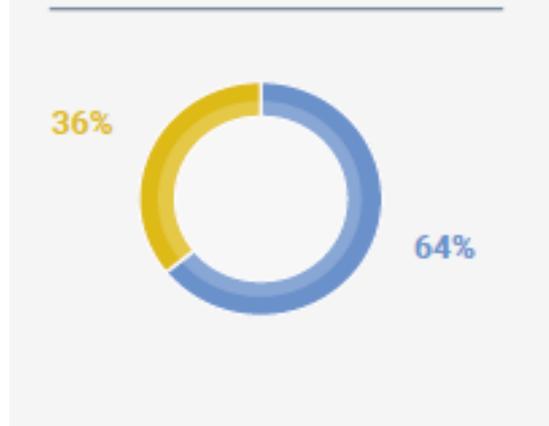


Market structure & dynamics similar to pre-pandemic levels

Q3 2022



Q3 2019



Why choose the UK?



- **Safe and supported:** a world leader in caring for young learners.
- **Quality standards:** British Council accreditation assures excellence in teaching, welfare, accommodation and facilities.
- **Easy visas:** A simplified UK visa system means agents can advise students with confidence.
- **Choice:** locations, course options, institution type and start dates.



Learn British accents, phrases and vocabulary



ENGLISH
UK

More than 100
study locations

Choose from modern
and historic cities,
seaside towns or rural
locations and country
villages.



ENGLISH
UK

Adventures all around the UK

Spend a weekend in
Scotland or Cornwall,
Wales or Northern
Ireland.



ENGLISH
UK

British culture and attractions

From Sherlock Holmes to Games of Thrones and Harry Potter, The Beatles to One Direction.





English with Confidence

launched in 2021

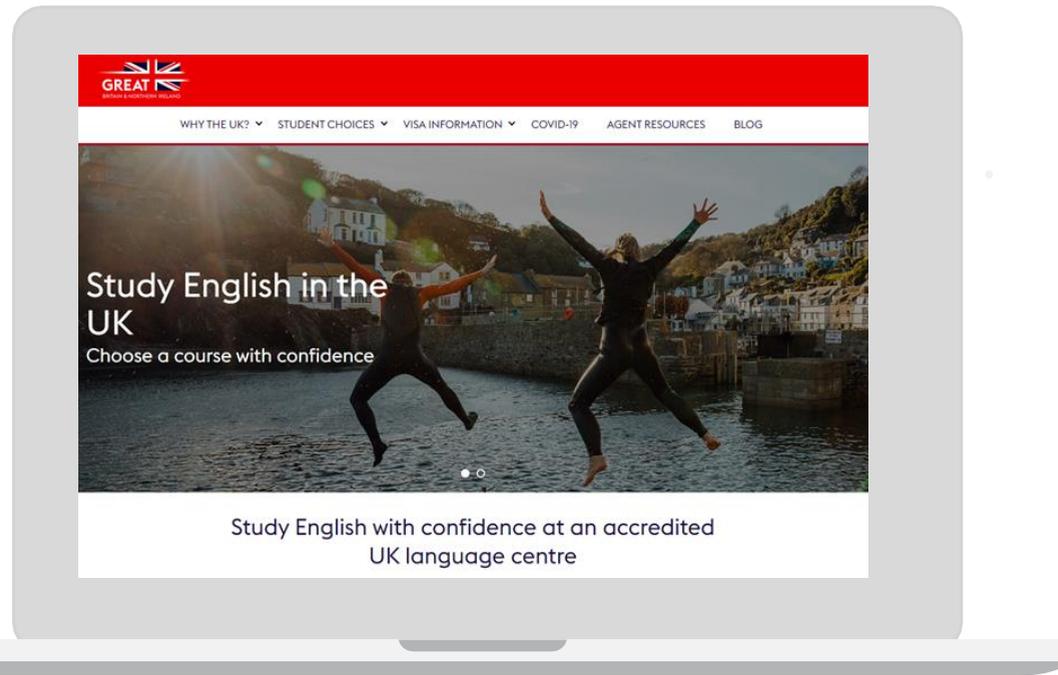


Campaign website



Dedicated information website for study abroad agents, international partners and educational counsellors

- Why choose the UK?
- Student choices
- Visa information
- Covid-19
- Agent resources & blog



englishuk.com
study.englishuk.com

study.englishuk.com/blog

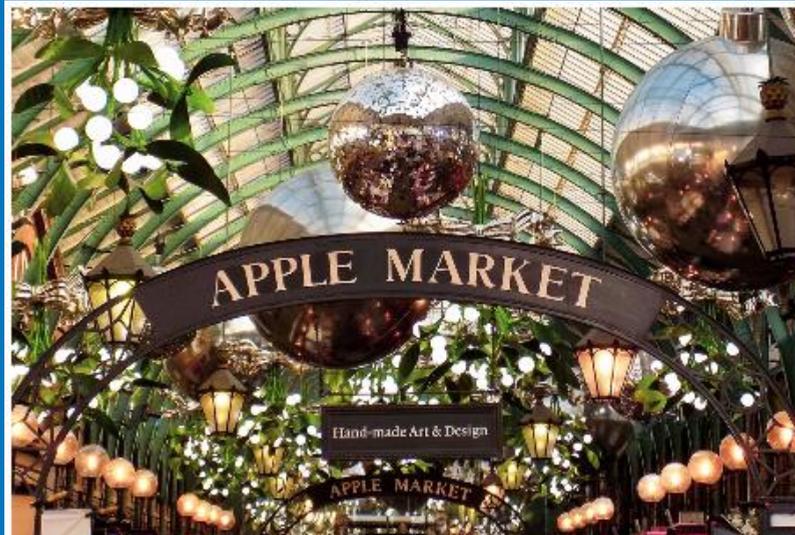


5 reasons to study English in Northern Ireland

30 January, 2023 | By English UK

Northern Ireland is the smallest of the four nations that make up the United Kingdom. It lies across the sea from the rest of the UK and borders the Republic of Ireland to the south. There are accredited English language centres

[read more](#)



Students get ready for Christmas in the UK

14 December, 2022 | By English UK

As the UK's English language schools get into the festive spirit, international students are experiencing seasonal traditions, enjoying Christmas events around the UK and in some cases seeing snow for the first time! Let's see

[read more](#)



StudyWorld spring + fam trips | Agents are invited to London in March '23 to meet UK schools

3 November, 2022 | By English UK

Agents are invited to meet UK schools at StudyWorld spring Study abroad specialists from around the world are invited to attend StudyWorld spring - a B2B event that connects study travel agencies with UK institutions.

[read more](#)



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A group of diverse people, including men and women of various ethnicities, are walking together outdoors. They are dressed in casual to semi-formal attire. The background shows a building with large windows and some greenery. The overall atmosphere is bright and positive.

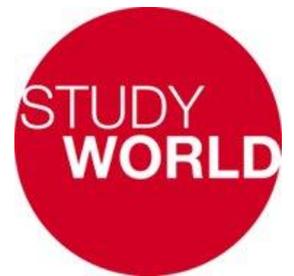
EXPERIENCE
life in the UK

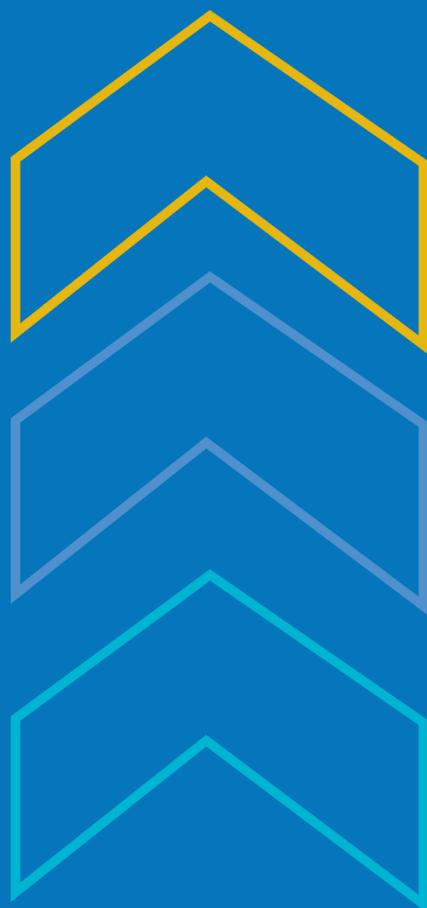
Upcoming events



StudyWorld: Friendly, focused networking events for UK educators and international agents.

- StudyWorld spring 2023 (in-person in London): 8 - 10 March
- StudyWorld spring 2023 Fam trips
- StudyWorld autumn 2023 (online): 20 - 21 September
- studyworldfair.com
- Organised by English UK.





Thank you

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