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.

English UK and our members

- English UK is the trade body and membership organisation for accredited state and privately-owned English language teaching providers. It currently has 437 members, of which 43 are state colleges, 26 state universities, and the rest are privately owned.
- Members include university English Language centres, pathway providers, further education colleges, boarding schools, and privately-owned centres which are a mix of chain schools and independents.
- There is a huge diversity of centres, including those teaching thousands of students each year, those offering summer courses for teenagers only, to very small providers teaching a handful of students each week. The majority of ELT centres are owner-run SMEs.
- All members must be accredited by Accreditation UK, one of the world's longest-running and most rigorous specialist inspection schemes. It is run by the British Council with English UK as a strategic partner. Members who offer Tier 4 visas must also have accreditation from a Home Office-approved provider.

Information in this submission was drawn from a specially-commissioned update of our 2014 Capital Economics report into the Value of English language teaching, with figures gathered from English UK member centres in December 2017 by StudentMarketing attached; a specially-commissioned survey of past and current students by StudentMarketing; and our Annual Student Statistics report, collated by StudentMarketing for English UK, also attached.

Contents

1. Global competition

Approximately 1.38m students travelled abroad to learn or improve English in 2016 in one of eight major destination countries in 2016, a slight drop on the previous year because of declining student numbers in market leaders the UK and the USA.

The UK remains by far the top destination for international ELT students, but is also experiencing a decline in the amount of time students are spending on courses.

Competitor nations such as Australia, Canada, Ireland, New Zealand, Malta and South Africa, where governments have made it policy to grow their international education sector, are in the main experiencing rising student weeks and rising or relatively stable student numbers.

Type of course offered is a key driver: the UK market is becoming more popular with junior students. The average course length for a student at a private language school in the UK is currently 3.7 weeks: this data is unavailable for state sector institutions.

In general, students under 18 (juniors) come for shorter courses than adults.

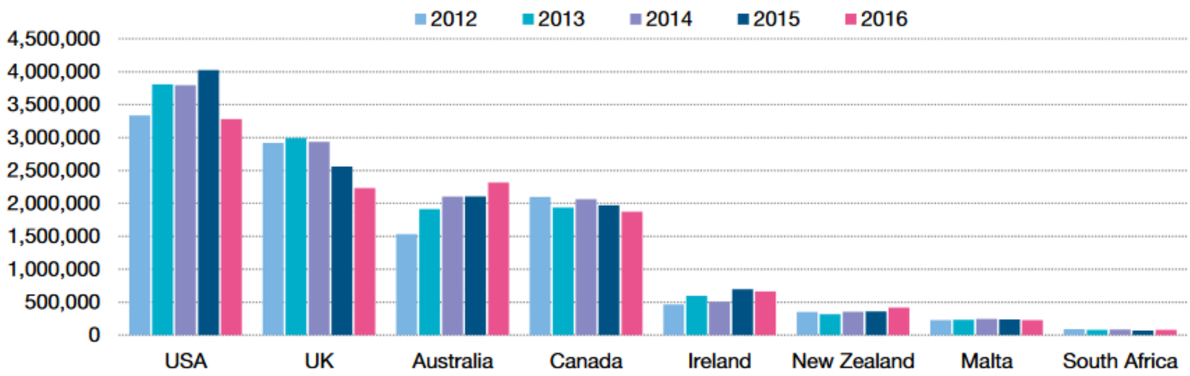

Fig 1. Overview of ELT destinations (student weeks)

Source: StudentMarketing, 2017; Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount

2. Who are the students and why do they come?

Around 550,000 students came to the UK last year to learn or improve their English[3], attracted by our nation's history, culture, reputation for education and status as the home of the language.

> *"The younger generation... view English as an essential stepping stone to better career prospects in the private sector."*[4]

Though English is increasingly taught from an early age in schools in many countries, most students do not achieve the level they need for employment or university, typically getting no higher than B1.

Many key source markets have moderate or low levels of English[5] and an advantage of coming here is total immersion.

a. Junior students

Under-18s now make up 51 per cent of students in private ELT centres, staying on average two weeks. Many are on short-stay summer courses but sometimes visiting with their own schools in closed groups or here to improve their language level for university entrance. They are covered by stringent safeguarding regulations.

b. Adults

Most 18+ students are here to improve their language skills for study or work.

i. Learning for academia

They may need a particular English level to enter university in their own country: a large proportion are ambitious to study at a UK university at undergraduate or postgraduate level and need to get their English to at least B2/IELTS 6.5, so take a course in academic English, or join a special pathway course to improve language skills and accustom them to UK teaching methods.

It is important for the UK HE sector that these students are captured when they are juniors or young adults. Once they have found their feet in one English-speaking system, they are likely to want to remain within it for the duration of their education.

> *"We know, from the work done by the Knowledge Partnership earlier this year on previous years' higher education student data, that university applications from international students already in the UK are far higher than previously believed, at around 50 per cent. And importantly, almost 60 per cent of successful applications to UK universities by international students come from within the UK, where those students are on preparatory courses such as international foundation year programmes.*
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> *If the visa changes hit that 'pipeline' the damage to the UK higher education sector could be severe – international students subsidise home students by the higher fees they pay, and they keep many departments and degree courses (especially in science, engineering, technology and maths-related subjects) open.*
>
> *Incredibly international students are 70% of the total of students taking UK Masters degree courses – if we lost them, virtually every Masters degree course in the UK would become unviable financially."*[6]

[3] The Value of English Language Teaching, Capital Economics, 2018
[4] The Relationship Between English and Employability, British Council 2015
[5] EF English Proficiency Index https://www.ef.co.uk/epi/
[6] Tony Millns, former chief executive of English UK, English Language Gazette, August 2012

Many of the students who start as English learners do carry on to become what the Government refers to as “the brightest and the best” - high-flying university students.

> *“Meet Abdulrahman from Saudi Arabia, another one of WSE’s success stories. Abdulrahman studied at Wimbledon School of English for 8 months in 2012 and came back to visit us today. He has been in the UK ever since and has just completed an MSC in Aerospace Engineering.*
>
> *Abdulrahman was studying at Brunel University and living in Putney so he’s definitely a West London kind of guy! He is now hoping to do his PhD at Brunel University and has put together a fascinating research proposal about Unmanned Aerial Vehicles.”*[7]

ii. Learning for work

Significant numbers of adults come to improve their English for work.

Some EU nationals choose to come and work in the UK to practise English, with some language centres helping them to fit classes around shifts (Student visa holders on courses in the private sector or state colleges are no longer permitted to work).

Others come specifically for instrumental English - learning for a purpose - or work-focused tuition, sometimes sponsored by their workplace, focusing on employability and key competences. This can include short, intense courses, longer ones, and continuing tuition using Skype or other technology.

> *“I studied English at school but now I need to improve my skills because I must speak it daily. I am trying to improve my English for my job, but I suggest an experience in England to everyone, old or young, because the knowledge of a different language makes you feel comfortable everywhere in the world.”*[8]

iii. Learning for pleasure

A much smaller group come to learn or improve English for pleasure. They often come on cultural packages aimed at over-50s with a strong leisure or sightseeing element. There are very restrictive rules around whether study is allowed for people on tourist visas, or when accompanying children who are studying in the UK.

3. Where do our ELT students come from?

- In 2016 the top five UK source markets were Italy, Saudi Arabia, Spain, France and China
- The rest of the top 10 were Turkey, Switzerland, South Korea, Japan and Germany
- Other major players include Brazil, Kuwait, Russia, Colombia, Taiwan, Oman, Thailand, Mexico and Argentina.

EU markets are particularly important: almost a quarter of students came from Italy in 2016, just under 10 per cent from Spain, around nine per cent from France and 7.7 per cent from Germany.

Some juniors, particularly in school groups such as on the EU-funded PON scheme in Italy, do not travel on passports but identity cards. Our members are concerned that post-Brexit, these students will instead go to Malta or Ireland if parents otherwise have to purchase expensive passports primarily for use on their child’s UK language holiday.

[7] Wimbledon School of English website
[8] Paolo Poggi, ex-Serie A footballer, now international project director of Venezia FC

4. ELT in the UK: scope, jobs and revenue

English language teaching centres

English language teaching centres operate throughout the UK.

There are 509 language centres accredited by Accreditation UK, of which 437 are English UK member centres, and several hundred, often seasonal, centres operating without any accreditation and teaching EU students only.

London has the biggest share of the market, on 27 per cent in 2016, followed by the South-East with 24 per cent.[9] In hotspot areas such as Bournemouth, Brighton, Oxford and Cambridge ELT is a vital part of the local economy, injecting many millions of pounds annually and providing additional income for host families, revenue for transport and tourism as well as directly through schools and their staff.

The ELT sector is becoming ever-more nimble and innovative in its course offer, to thrive in an increasingly competitive global market. The latest opened just this week: the Capital School of English in Bournemouth has launched its Future Success centre focusing on instrumental English and international employability.

Students come to work on real-life projects set by local businesses, improving both their soft skills and their English as they work with course tutors and the employers to get hands-on experience in the global marketplace.

Employment in ELT centres

EL 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. Of these, 11,400 are teachers and academic managers, with a FTE of 8,800: much ELT is seasonal and so many staff are employed on temporary contracts.

ELT centres employ a wide range of highly-trained and more general staff. They include teachers, who will commonly have at least a first degree, a Certificate in English language teaching (CELTA) and often a Diploma in English language teaching (DELTA) as well. In FE colleges, the teachers will also have a PGCE or equivalent. Centres also have marketing staff and a wide range of administrators and student welfare specialists.

[9] English UK Student Statistics Report 2017

	English language teaching	All activities
North East	70	130
North West	550	920
Yorkshire and The Humber	440	730
East Midlands	160	270
West Midlands	290	500
East	720	1,210
London	2,100	3,540
South East	2,140	3,610
South West	1,510	2,550
Wales	330	560
Scotland	390	660
Northern Ireland	90	160
United Kingdom	**8,800**	**14,800**

Fig 2: Number of full time equivalent employees at English language teaching centres by region, 2016/17

Source: Capital Economics' analysis of survey of English language centres and English UK data

Regional effects and supply chains

The effects of language centres reverberate throughout their regions and supply chains. Even in Northern Ireland, the region with the smallest ELT presence, the industry employs 90 teaching staff (160 for all the centres' activities), bringing a GVA of £2m and a £4m turnover.

Spreading further out in the province, 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.

At the other end of the spectrum, the London centres create 2,100 teaching posts and a further 1,440 in their wider activities, with a GVA of £30m and a £68m turnover. The centres' supply chain supports a further 1,190 jobs from all associated activities, increasing overall GVA to £53m.

	English language teaching			All activities		
	Jobs (number)	GVA (£ million)	Turnover (£ million)	Jobs (number)	GVA (£ million)	Turnover (£ million)
North East	120	6	15	160	8	21
North West	420	20	48	580	27	67
Yorkshire and The Humber	250	12	31	340	17	43
East Midlands	310	14	34	430	19	47
West Midlands	280	14	34	380	19	47
East	380	17	41	530	23	58
London	850	38	95	1190	53	132
South East	810	34	84	1120	47	117
South West	270	14	34	380	19	47
Wales	190	8	21	260	12	29
Scotland	460	20	50	640	28	70
Northern Ireland	120	6	14	170	8	19
United Kingdom	**4,450**	**203**	**501**	**6,190**	**282**	**697**

Fig 3. Indirect effects of spending on suppliers by the English language teaching centres by region, 2016/17

Source: Capital Economics' analysis of survey of English language centres, English UK data and StudentMarketing data. Figures may not sum due to rounding.

The effect in the South East is almost as significant, with 680 jobs in language centres, 1,120 jobs in the supply chain and a GVA of £43m.

Scotland sees the next largest effect, with 270 jobs, a GVA of £12m, and a turnover of £27m in the language centres and a further 640 jobs and GVA of £28m in its ELT supply chain.

	English language teaching			All activities		
	Jobs (number)	GVA (£ million)	Turnover (£ million)	Jobs (number)	GVA (£ million)	Turnover (£ million)
North East	60	3	6	90	4	9
North West	230	10	22	320	13	30
Yorkshire and The Humber	160	7	15	220	9	21
East Midlands	130	5	12	180	7	16
West Midlands	160	7	16	220	9	21
East	230	9	20	320	12	28
London	540	22	50	740	30	68
South East	500	19	43	680	26	59
South West	300	12	26	410	16	36
Wales	110	4	10	140	6	13
Scotland	190	9	20	270	12	27
Northern Ireland	40	2	4	60	2	6
United Kingdom	**2,650**	**108**	**244**	**3,650**	**148**	**335**

Fig 4. Induced effects of the English language teaching industry by region, 2016/17

Source: Capital Economics' analysis of survey of English language centres, English UK data and StudentMarketing data. Figures may not sum due to rounding.

ELT's impact on mainstream education

ELT has no detrimental impact on mainstream education in the UK, and if anything supports services provided for UK nationals. For instance, students in universities, paying international fees, will tend to subsidise students paying their way with a UK government loan. International students in FE colleges also subsidise other courses, and also ensure there are specialist staff to teach English as an Additional Language courses for people newly-settled in the UK.

Privately-owned ELT centres would be unlikely to exist at all without demand from international students, and we have seen recent closures as demand falls - but having these centres ensure there is EAL teaching available for UK citizens as well as recent refugees and asylum-seekers. Several English UK member centres are working *pro bono* with RefuAid, a charity helping often highly-qualified refugees gain the language skills they need to be able to use their medical, scientific and other skills for the benefit of their adopted country.

5. Where do students live?

The majority of our students live with ordinary UK families in "homestay" accommodation, with a minority in specialised residences. Summer students on junior courses often learn and stay in boarding schools or campus universities.

A survey of former and current students found 61 per cent of students living with host families, a further 16 per cent in student residence, and five per cent with relatives.[10] Just eight per cent rent a self-catering apartment, and 10 per cent make other arrangements, demonstrating that ELT students living in the UK have no significant impact on the wider availability of accommodation.

Rather, the EL students usually represent a useful, extra source of income for families who can make space for them, or for schools and universities which would have surplus accommodation during holiday periods.

> *"I've seen first-hand how hosting families affects people's lives for the better. Shortly after being widowed, a lady was persuaded by her friend to host with us, it wasn't long before we received a letter from her daughter thanking us for giving her mum a new lease of life and sense of purpose. Another new host had recently got divorced and was frantic with worry about supporting her family; at our Christmas party last week she was all smiles and has proved a very popular host. Johanna is in a wheelchair but manages to welcome many students who all love her and enjoy getting involved with a dog rescue charity she set up."*[11]

6. Tourist and other leisure spending by students and their visitors

ELT students who come to the UK are keen to experience the culture and go sightseeing - adults often travel independently as well as enjoying activities organised by their language centre, whilst tourist trips are part of most junior summer courses.

Many students have a high disposable income to cover their stay in the UK and like to enjoy food, travel, entertainment and shopping. Overall, the effect of students' spending outside their language centres supported a further 8,250 jobs throughout the UK, with the largest numbers in London (1,800) and the South East (1,570), dropping to one hundred in Northern Ireland. Their spending had a GVA of £334m, with a turnover of over half a billion pounds - £757m.

Their biggest spending is on food, followed by personal shopping, leisure travel and accommodation. This spending has a particular impact in ELT hotspots, where buses and taxis, cafes, shops and tourist attractions are often underpinned by the patronage of students and their language centres.

> *"Our older students are allowed to walk to the local shop (Motcombe) in their free time. This is a small community-run shop and they say every year they enjoy our students going there because they sell more in the month we are taking our students then they do all year! It's what keeps the shop going which is important for the community."*[12]

We also benefit from the spending of students' visitors: just over a quarter of students had an estimated four friends or family member to stay at some point during their studies. We estimate that each one of these visitors spends around £140 on a three or four day stay, generating additional spending of around £155m, supporting around 2,970 jobs and a GVA of £120m.

[10] The Social Impact of UK ELT, StudentMarketing, 2018
[11] Jacqui Ashman, host family co-ordinator, St Giles Highgate
[12] Sarah Etchells, English Country Schools

7. What do students do after their course is finished?

Predominantly, they go home: 77 per cent of current/past students surveyed by StudentMarketing in December 2017 gave this answer, with 23 per cent taking the opportunity to travel a little first if their immigration status allowed this.

But they plan to return: almost 80 per of current and past students told us they planned to return: half were considering solo travel, while over a third wanted to come back with a small group of friends or family. Just two per cent had no plans to return.

We estimate that students remaining in the UK after their course spent an average of £320 per week each for almost nine weeks, with a total spend of £450m over the year. This supports around 8,590 jobs, and represents a turnover of around £788m.

	Jobs (number)	GVA (£ million)	Turnover (£ million)
North East	200	9	20
North West	740	31	69
Yorkshire and The Humber	510	21	48
East Midlands	420	17	39
West Midlands	480	21	47
East	710	28	63
London	1,870	76	171
South East	1,640	63	142
South West	950	37	83
Wales	290	12	27
Scotland	660	29	66
Northern Ireland	130	5	12
United Kingdom	**8,590**	**348**	**788**

Fig 5. Induced effects of the spending by English language teaching students after their course finishes by region, 2016/17

Source: Capital Economics' analysis of survey of English language centres, English UK data and StudentMarketing data. Figures may not sum due to rounding.

Visa rules mean that non-EU students who wish to continue their education in the UK must return to their home country to make the application.

Students typically form a strong affinity with the UK: they say people are friendly and helpful, and for many it is their first experience abroad without their parents.

8. Visas

There are several different types of visas available to ELT students: Tier 4, six-month short-term study visas, and 11-month short-term study visas which are available only for students on English courses. In general, students at state sector institutions are more likely to travel on Tier 4 visas and those in privately-owned centres on six-month short-term study visas, although the 11-month option is very popular across the sector.

We estimate that students spent £27m on visas and the £150 healthcare surcharge in 2016/17: the cost for both ranges from £93 for short-term study visas (where the healthcare surcharge is not applicable) to £485 for the Tier 4 version.

9. Overall impact and fiscal cost of students

There is no doubt that English Language students are, overall, a benefit to the UK economy.

Their consumption of public resources is estimated at £83m for 2016/17, but set against tax revenues generated from their course fees and other spending, the outcome is a net gain of £131m.

This averages out as a profit for UK PLC of £216 for each four-week student visit.

> *"I think it's fantastic what our nation earns from those coming in: it's far too important to have any restrictions on it or not encourage it. It should be encouraged by everybody - look at the employment, the taxis, tour buses and private cars we use in a year is staggering. There are guides, blue badge guides… the employment opportunities that come from somebody like us is unbelievable, and we're driving so much foreign currency. I am a 100 per cent foreign exporter. It's a fantastic import company and this is a fantastic opportunity - goodness knows what the sector is worth."*[13]

The overall fiscal cost of students to the Treasury before tax revenues are taken into account is £250m: the components of this are spending on public order and safety, health, economic affairs and a very small component - £5m - on education.

[13] Peter Brown, Director of Hosts International which has 8,000 fully trained and vetted host families working with 37 ELT centres throughout the UK

	Per capita cost of all public services for the UK general population, £ per 3.7 week	Cost of public services accessible by foreign English language students in proportion to likely usage, £ per capita per 3.7 week	Estimated additional or incremental cost to UK Government of provision of public services to foreign English language students, £ per 3.7 week course
EU transactions	5	0	0
Housing and community amenities	11	6	0
Environment protection	12	12	0
Recreation, culture and religion	12	12	0
Public order and safety	32	65	65
Defence	40	40	0
Economic affairs	51	51	32
General public services	67	21	0
Education	94	4	4
Health	155	72	70
Social protection	284	0	0
Total	**763**	**283**	**171**

Fig 6. Estimated fiscal cost of international students, 2016/17(£ per 3.7 week period, which is the average length of study)

Source: Capital Economics, HM Treasury and Office for National Statistics. Figures may not sum due to rounding.

Tax revenues are supported by payments from the EL centres, their suppliers, spending of employees as well as the students' spending on visa application fees, leisure activities and accommodation. For instance, a student pays an average of £44 VAT during their 3.7 week stay.

Other headline figures the ELT sector can claim are:

- Gross value added to the UK of £1.429bn from all ELT, supplier and student/ student visitor activities
- Turnover of £3.1bn
- Taxes paid: £257m
- Supports 35,700 jobs
- Total turnover from ELT of £630m in 2016/17, and from all ELT centre activities of £790m
- Gross value added from ELT of £320m, and from all ELT centre activities of £420m
- Total tax take supported by ELT £83m
- Students spent £430m outside their centres
- 124,000 students spent £27m on visa and healthcare levy applications
- 6.2 per cent of students' spending went on VAT, to which each student contributed £44
- The sector and its students contributed £236m to UK tax
- Students spent £450m after their courses ended.

	GVA (£ million)	Jobs (number)	Turnover (£ million)	Taxes (£ million)
Direct effects from students' spending on English language courses	316	8,800	635	83
Indirect effects from centres' spending on suppliers	203	4,450	501	29
Induced effects from spending of centres' employees	108	2,650	244	17
Induced effects from students' spending while studying	334	8,250	757	53
Induced effects from students' spending after their course	348	8,590	788	56
Induced effects from spending of those visiting students	120	2,970	272	19
Total	**1,429**	**35,710**	**3,197**	**257**

Fig 7. Components of the contribution of English language teaching to the United Kingdom economy, 2016/17

Source: Capital Economics' analysis of survey of English language centres, English UK data and StudentMarketing data. Figures may not sum due to rounding.

There are also many soft benefits to the UK.

Students, particularly those staying for longer, often get involved in a positive way in the life of the UK, supporting their local communities by volunteering - sometimes in local schools - or raising money for charity.

> *"Last summer the students contributed over 2160 volunteering hours by volunteering to support Pilgrims' Hospice, Cancer Research UK Fun Runs, Canterbury Park runs, local festivals and cultural workshops to local schools. Our co-ordinator says: "According to my volunteer hours log, Yuya Ishii has completed the most amount of hours for volunteering (88). Therefore I shall be nominating him for the prize for Contribution to Community. If it were also possible to have a female going forward, Kaide Hada has been a superb volunteer, joining in just about everything & with such cheerfulness too. She contributed the next highest number of hours: 78.'"*[14]

> *"Working as a volunteer practitioner photographer in London since 2016 is being a rewarding experience. I feel really happy to be part of MRC - Migrants Resource Centre, BRS - Barnet Refugee Service and NCS - National Citizen Service teams and see the great work they delivery to their customers. It is not always easy but it is challenging and it is good to know that all our efforts could contribute and make the difference in a positive way in one's life."*[15]

The students themselves value the experience, although coming to the UK is rarely a cheap option for them.

> *"I would recommend people to come here though it was a long journey. I sold my car to study here - it's more expensive than Brazil. I would really recommend coming here to Leeds."*[16]

> *"There's nothing I don't like. It's a very good country. Before I came here I thought English food had a very bad image but I am staying with a host family and they are always making food which is delicious. And Torquay is always sunny."*[17]

[14] Chaucer College, Canterbury
[15] Brazilian student, The English Studio
[16] Lucas Marinho Da Silva, Brazilian student at Leeds English Language School
[17] Japanese pop singer Risa Kitano, studying for fun at Torquay International School

Conclusion

English language teaching is a sector which is often overlooked by policymakers as well as the general public, but is important not just because of the economic benefits it brings, but because of its disproportionate effect on the UK's soft power reach, as an informal feeder to the HE sector, and because it encourages cultural exchanges at all levels.

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

The voice of the ELT sector can go unheard as a result of the huge variety of providers, and because many are SMEs working in isolation. It is important that the value of our industry be understood by the Migration Advisory Committee and the Government, to ensure that our industry can continue to bring its wider benefits to the UK's economy, society and world influence as we move beyond the stable trading relationships of the EU.

It is vital 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, and we reiterate our desire to see visa-free travel for students from Europe, and travel document flexibility for teenage groups.

Without this, we fear an accelerated decline for this important industry as potential students choose our EU competitors, which will welcome them with open arms.