

CALL FOR EVIDENCE:

All-Party Parliamentary Group inquiry - Role of English in European countries

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The UK is the largest English language teaching market in the world, teaching 662,704 ESL students in 2017, up 4.2% on 2016, and generating just under two billion (UK£1,951,550,496) in revenue, according to *StudyTravel Magazine's* annual [Global Market Report](#).

The UK ELT sector has long-benefitted from strong European student markets including France, Spain, Germany and Italy. According to *ST Magazine's* most recent UK Market Analysis (to be published in May), Italy was the top student source for UK language schools (17.1%) in 2018, followed by Spain (12.1%) and France (12%). Germany was the sixth most important student source country (3.7%) in 2018.

Agents are the predominant source of recruitment for English language schools in the UK, accounting for 80% of all students enrolled in 2018, according to *ST Magazine's* annual analysis, up from 72% in [2017](#).

When *ST Magazine* surveyed the [German](#) outbound agency market in 2018, language school placements accounted for a 70% share of agency business, with the UK requested by 88% of German student clients.

Similarly, in [France](#), language school placements accounted for an 85% share of total agency business in 2018, with the UK coming top again, requested by just under half of students (42%) using an agency to source an English language programme abroad.

In [Spain](#), language school placements accounted for a 95% share of agency business in 2017, with the UK requested by just over half of Spanish outbound students (51%). Language placements accounted for 97% of all business for [Italian](#) study abroad agencies in 2017, with the UK the most favoured destination (61%).

The above illustrates the hugely positive contribution just four European markets have on one of the UK's most significant and profitable export industries.

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