# UK English language teaching enrolments continue to decline amid global downturn and policy shifts



English language teaching (ELT) enrolments in the UK have continued to decline through the first half of 2025, extending a trend that has been observed globally since 2024. According to the latest quarterly reports from English UK, there was a "slower than usual" build-up to the critical summer season, with a 12% decrease in student weeks comparing Q1 2025 to Q1 2024, and a further 15% drop in Q2 on a like-for-like basis. This decline has impacted both adult and junior learners, marking a shift from previous quarters when primarily adult enrolments were softer.

This reduction in UK ELT student numbers reflects broader global patterns identified by BONARD, English UK's research partner. Across major English language learning destinations worldwide, enrolments dipped in the second quarter of 2025, driven by factors such as visa restrictions, enrolment caps, shifts in government administration, and economic downturns in key source markets. Additional challenges facing sending countries include volatile exchange rates and ongoing trade tensions, especially in Asian markets, which have dampened outbound student mobility. The overall volume of student weeks in Q2 2025 was only 68% of pre-pandemic levels from Q2 2019, indicating a slow recovery trajectory compared to 72% reported at the end of 2024.

Regionally, the Middle East remains a dominant source of students for UK ELT, accounting for over a third of student weeks in Q2 2025. Saudi Arabia continues as the top sending country, despite a decrease of nearly 3,000 student weeks compared to the same quarter in 2024. In contrast, Türkiye demonstrated strong growth among key markets, adding just under 2,000 student weeks year on year and maintaining its position as the second-largest sender.

The decline in UK ELT enrolments mirrors a wider downturn in language learning across the UK educational landscape. Recent analysis from the Financial Times and the Higher Education Policy Institute reveals significant drops in modern foreign language study at A-level and university levels. Less than 3% of A-level entries in England are in modern foreign languages as of 2025, a drop attributed to a longstanding shortage of language teachers and the 2004 policy shift that removed mandatory language study until age 16. Concurrently, university language departments face sustainability challenges, with a 20% fall in undergraduate language degree applications from 2019 to 2025. Leading northern UK universities have initiated collaborative discussions to consolidate language courses, reflecting a national struggle to maintain language education provision amid shrinking student interest.

This contraction in formal language study is echoed in the closure of numerous language programmes over the past decade, with 28 modern language degrees discontinued at post-1992 universities since 2014. The cumulative effect has been a weakening pipeline of language learners, potentially impacting future demand for ELT in the UK and globally. Despite these headwinds, BONARD predicted earlier that UK ELT might still outperform competitors in Australia, Canada, and the US for 2024, highlighting a complex and evolving market landscape.

In summary, UK ELT enrolments during the first half of 2025 reveal a marked decline influenced by policy uncertainties, economic factors, and shifting priorities in language education. This aligns with global decreases in ELT student volumes and a national context of diminishing interest and capacity in language learning, painting a challenging picture for the sector’s immediate future.

### 📌 Reference Map:

* Paragraph 1 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[2]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/04/uk-elt-reports-a-decline-in-student-weeks-for-2024/)
* Paragraph 2 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[2]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[3]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/)
* Paragraph 3 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[2]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/)
* Paragraph 4 – [[5]](https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f), [[7]](https://www.hepi.ac.uk/2025/07/31/new-report-shows-decline-in-formal-language-learning/)
* Paragraph 5 – [[6]](https://www.ft.com/content/d949c6d4-6071-49d6-a10e-7e6111f02a69), [[7]](https://www.hepi.ac.uk/2025/07/31/new-report-shows-decline-in-formal-language-learning/)
* Paragraph 6 – [[4]](https://monitor.icef.com/2025/04/uk-elt-reports-a-decline-in-student-weeks-for-2024/), [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/)
* Paragraph 7 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[2]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[5]](https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f), [[6]](https://www.ft.com/content/d949c6d4-6071-49d6-a10e-7e6111f02a69), [[7]](https://www.hepi.ac.uk/2025/07/31/new-report-shows-decline-in-formal-language-learning/)

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## Bibliography

1. <https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/> - Please view link - unable to able to access data
2. <https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/> - This article reports a decline in English language teaching (ELT) enrolments in the UK during the first half of 2025. The decline is attributed to policy uncertainties, including enrolment caps, visa restrictions, changes in government administration, and economic downturns in key source markets. The report highlights a 12% decrease in student weeks from Q1 2024 to Q1 2025 and a 15% decline in Q2 2025 compared to the same quarter in 2024. Saudi Arabia remains the top sending market, though with a decrease of nearly 3,000 student weeks compared to the same quarter last year. Turkey showed the strongest growth among top source markets, gaining just under 2,000 student weeks from the same quarter in 2024.
3. <https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/> - This article discusses a 10% decline in global English language teaching (ELT) enrolments in 2024, as reported by BONARD's Global ELT Annual Report 2025. The decline is attributed to more restrictive visa settings and growing concerns around affordability. Of the top eight English language learning destinations, only Ireland and Malta are currently trending above pre-pandemic volumes. ([monitor.icef.com](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/?utm_source=openai))
4. <https://monitor.icef.com/2025/04/uk-elt-reports-a-decline-in-student-weeks-for-2024/> - This article reports a 9% decline in student weeks for UK English language teaching centres in 2024 compared to 2023. Despite the decrease, industry research firm BONARD predicts that UK ELT providers will outperform counterparts in Australia, Canada, and the US in 2024. ([monitor.icef.com](https://monitor.icef.com/2025/04/uk-elt-reports-a-decline-in-student-weeks-for-2024/?utm_source=openai))
5. <https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f> - This article reports a continued decline in foreign language study among A-level students in England, with less than 3% of A-level entries in modern foreign languages in 2025. The decline is attributed to a persistent shortage of language teachers, with only 43% of recruitment targets met in 2024, and to the 2004 policy change that removed the requirement for language study until age 16. ([ft.com](https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f?utm_source=openai))
6. <https://www.ft.com/content/d949c6d4-6071-49d6-a10e-7e6111f02a69> - This article discusses how UK universities are considering merging language courses due to a sharp decline in student enrolment, threatening the sustainability of language departments. The N8 Research Partnership, comprising leading northern institutions like Durham, Manchester, and Newcastle, has initiated discussions on resource sharing and collaboration. This move reflects broader national trends, with a 20% drop in undergraduate language degree applications from 2019 to 2025, despite an overall 10% rise in university applications. ([ft.com](https://www.ft.com/content/d949c6d4-6071-49d6-a10e-7e6111f02a69?utm_source=openai))
7. <https://www.hepi.ac.uk/2025/07/31/new-report-shows-decline-in-formal-language-learning/> - This report from the Higher Education Policy Institute highlights a significant drop in formal language learning in the UK. Key findings include a 20% decline in the uptake of degree programmes in languages over five years, with more A-levels in Physical Education than in French, German, and Classical Languages combined. Language teacher recruitment is at just 43% of the official target, and since 2014, 17 post-1992 universities have lost their modern languages degrees, bringing the total closures to 28. ([hepi.ac.uk](https://www.hepi.ac.uk/2025/07/31/new-report-shows-decline-in-formal-language-learning/?utm_source=openai))