# UK English language teaching sector faces accelerated enrolment decline amid policy and economic challenges



The UK’s English language teaching (ELT) sector has experienced a noticeable decline in enrolments during the first half of 2025, continuing a global downward trend that began in 2024. According to English UK's quarterly report, the buildup to the key summer season was "slower than usual," marking a sustained reduction in student numbers across the sector. This aligns with wider international patterns where major ELT destinations have faced shrinking enrolment figures.

English UK's International Education Director, Ivana Bartosik, highlighted several contributing factors to this decline, including policy uncertainty such as enrolment caps and visa restrictions, alongside economic downturns in critical source markets. These challenges have created an unpredictable environment for prospective international students. The report underlines a 12% drop in student weeks from the first quarter of 2024 to the same period in 2025 among schools operating continuously over this span. The fall is particularly pronounced among adult learners, with junior learner numbers also decreasing through the second quarter.

Economic and geopolitical factors also weigh heavily on the sector's performance. English UK noted that Asian markets—themselves impacted by ongoing trade disputes and volatile currency exchange rates—have seen reduced outbound student mobility, further contracting demand for ELT programmes in the UK. Student weeks for the second quarter of 2025 reached just 68% of pre-pandemic volumes recorded in 2019, a decline from the partial recovery of 72% seen in the fourth quarter of 2024.

When examining key sending markets, Saudi Arabia remains the largest source of students, though it experienced a drop of nearly 3,000 student weeks compared to the previous year. Meanwhile, Türkiye exhibited resilience and growth, increasing its student weeks by approximately 2,000 in the same period and securing its place as the second-largest sending market. The Middle East continues to be a dominant region, accounting for over a third of the total student weeks for the quarter.

These trends echo a wider global contraction in ELT enrolments, which saw a 10% decrease in 2024 across eight prominent English language learning destinations including the UK. Restrictive visa policies and affordability concerns have been identified as significant barriers by industry analysts. Only a handful of countries, such as Ireland and Malta, have managed to exceed pre-pandemic enrolment levels.

Adding further context, the challenges facing ELT coincide with a broader decline in language education within the UK. A separate report from the Financial Times highlights a significant drop in foreign language study at the secondary school level, with modern foreign languages constituting less than 3% of A-level entries in 2025. This is linked to a persistent shortage of language teachers and policy changes that diminished mandatory language study before age 16.

The impact of these declines extends into higher education, where university departments are grappling with fewer enrolments. Universities are reportedly considering consolidating language courses to maintain viability amid a 20% decrease in undergraduate language degree applications over five years. Despite an overall rise in university applications, interest in language studies has fallen sharply, raising concerns about the future supply of language professionals in the UK.

Experts, including Professor Charles Forsdick from the British Academy, warn that if these trends continue, access to language learning may become increasingly confined to more affluent schools, exacerbating social inequalities. This, in turn, could undermine the UK's capacity to engage effectively on the global stage, where multilingual skills remain vital for economic and diplomatic success.

Overall, the UK ELT sector’s challenges appear rooted in a complex mix of policy, economic, and social factors, reflecting both national and global dynamics. Recovery is likely to depend on stabilising visa and enrolment policies, addressing economic uncertainties in source markets, and revitalising language education pathways at home to sustain student demand in the longer term.

### 📌 Reference Map:

* Paragraph 1 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-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/)
* Paragraph 3 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/)
* Paragraph 4 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/)
* Paragraph 5 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/)
* Paragraph 6 – [[5]](https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f), [[6]](https://www.ft.com/content/d949c6d4-6071-49d6-a10e-7e6111f02a69)
* Paragraph 7 – [[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.thebritishacademy.ac.uk/news/language-trends-2025-response/)
* Paragraph 8 – [[1]](https://monitor.icef.com/2025/09/uk-elt-reports-declining-enrolments-for-first-half-of-2025/), [[4]](https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/), [[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.thebritishacademy.ac.uk/news/language-trends-2025-response/)

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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 on the decline in English language teaching (ELT) enrolments in the UK during the first half of 2025. It highlights a 12% decrease in student weeks from Q1 2024 to Q1 2025, with a similar trend observed in Q2 2025. The decline is attributed to factors such as policy uncertainty, including enrolment caps and visa restrictions, as well as economic downturns in key source markets. The article also notes that Asian markets have been impacted by trade wars and volatile exchange rates, leading to reduced outbound student mobility.
3. <https://monitor.icef.com/2025/04/uk-elt-reports-a-decline-in-student-weeks-for-2024/> - This article discusses the 9% decline in student weeks for UK English language teaching (ELT) centres in 2024 compared to 2023. Despite the decrease, the research firm BONARD predicts that the UK's ELT sector will have outperformed comparable sectors in Australia, Canada, and the US in 2024. The article also highlights that the junior segment is taking longer to rebound, with Q4 2024 reaching only 65% of student weeks compared to 2019 levels.
4. <https://monitor.icef.com/2025/09/global-elt-volumes-dipped-in-2024/> - This article reports on a 10% decline in global English language teaching (ELT) enrolments in 2024 compared to 2023, based on data from eight major English language learning destinations, including the UK. The decline is attributed to more restrictive visa settings and growing concerns around affordability. The article also notes that only Ireland and Malta are currently trending above pre-pandemic volumes among the top eight destinations.
5. <https://www.ft.com/content/b138178c-e741-45fe-b053-05420713c04f> - This article reports on 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. The article also highlights the impact on universities, where enrolments in language-related degrees have decreased by 20% over five years.
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. The article also notes a 20% drop in undergraduate language degree applications from 2019 to 2025, despite an overall 10% rise in university applications.
7. <https://www.thebritishacademy.ac.uk/news/language-trends-2025-response/> - This article presents the British Academy's response to the British Council's annual Language Trends report, which highlights the declining health of languages education in schools in England. Professor Charles Forsdick, Lead Fellow for Languages at the British Academy, expresses concern that language education may become accessible only to young people in the most affluent schools, which could have negative implications for the country's ability to tackle global challenges.