AULC Survey of Institution-Wide Language Provision in Universities in the UK (2023-24)

July 2026

Contents

1. Introduction

This survey, carried out by members of the Association of University Language Communities (AULC) amongst members based in the UK, sought to obtain a snapshot of Institution-wide Language Provision (IWLP) activity across the Higher Education sector in the UK in the academic year 2023-24.

Sometimes referred to as 'Languages for All', IWLP typically comprises elective language modules/course units taken for academic credit or as minor components of a degree, and extra-curricular language courses studied in addition to and alongside a student's degree programme, often as part of an evening course programme. Many students taking these courses may have little background in foreign language learning, and the courses they study are not a compulsory component of the degree programme for which they are registered.

This was the 12th year that the AULC survey has been conducted since 2011. As there is no other mechanism or agency in a position to compile this data[1], the AULC survey is of particular importance for planning and strategic purposes, and to give an indication of trends in language learning via institution-wide language programmes.

The surveys undertaken during the period from 2012-2013 to 2016-2017 showed that IWLP has been an expanding area, attracting increasing numbers of students in UK universities. This trend is the continuation of a pattern originally identified in earlier surveys (Marshall, 2001; Byrne and Abbott, 2007). Data collected from 2018 onwards have been more variable in nature (a generally lower response rate), reflective of the limited time available to contribute to the surveys (expanding demands on institution-wide language programmes) and indicative of increasing challenges and restructurings in the sector, which in a number of cases have made it difficult to locate a suitable member of staff to provide the data. However, the annual survey is still deemed to be valuable in offering insights into developments across the sector, and to support university-wide language learning as well as report on and inform the wider question of language education in Higher Education in the UK.

Specific aims of the survey for 2023-24 were to:

- gauge availability and demand for different IWLP languages in UKHE and note changing trends with a wider focus, capturing offer at more advanced levels (B2 and above)
- evaluate the continued availability of online courses after the pandemic
- obtain a better understanding of the activities being undertaken under the umbrella of institution-wide language programmes
- gain a sense of the opportunities for collaboration between universities where particular challenges exist

[1] Registrations for IWLP course units are not recorded in UCAS or HESA statistics.

2. Method

2.1. Surveying the sector

IWLP activity is rather difficult to survey. In most institutions, it includes accredited provision offered to non-specialist language learners; in others, the provision carries no academic credit. Many institutions offer both forms of provision, in some cases separately, in others in an integrated way. Activity may be managed from within a university language centre, or it may be offered alongside degree programmes within a language department, or via several other variations of organisational structure. In an increasing number of institutions, IWLP directorships are subsumed into teaching or coordination positions with limited access to data. In some institutions, provision for external learners (members of the public/lifelong learners) is incorporated as a part of the IWLP provision. The sector is also diverse in terms of the range of languages offered - with some institutions offering only three or four languages and others offering more than twenty - and in the ways these languages are offered to students e.g. length of courses, number of contact hours per course, modality of delivery in person only or online. All these variables may also change from one year to the next, simply due to local factors affecting capacity and demand for teaching and learning.

2.2. Questionnaire

For the 2023-24 survey, an electronic questionnaire was devised using Microsoft Forms. The survey was circulated in early March 2025 to all AULC institutional representatives in the UK using the AULC members' list as well as to directors or coordinators working for IWLPs that are not members of the AULC. Thus, the survey was sent to institutions with language centres and to those with IWLP activity in modern languages departments, even though in the latter case the activity might not be formally identified as IWLP. The survey closed in early April 2025 and was subsequently re-opened in July 2025 to enable 4 further IWLPs to register their responses.

2.3. Limitations

As with recent surveys, this survey only collected information on i) students studying a language course as a free choice, or 'elective', accredited course option and ii) students studying a non-accredited language course in addition to and alongside their degree programme. Thus, data was not collected for students who were studying a language which, though comprising a minor part of their degree (less than 50%), was not a 'free-choice option'. As a result, it is likely that a number of what might be termed 'non-specialist language students' have not been included in the figures reported here.

The survey also collected information on the range of levels offered for each language. However, data was not sought on the numbers progressing in a particular language across the years of study as it was felt that breaking this information down across the languages would be time-consuming for the respondents and would result in a lower response rate. Students themselves have also not been surveyed.

Not all responding institutions have been able to provide responses to all questions. This may either be due to the time required to collate this data, or due to the complexity of how this data is held locally. One large IWLP only provided data for learners enrolled in non-credit-bearing classes, although the institution also has a large separate programme for credit-bearing options.

While every effort is made to involve the same institutions in the survey year-on-year, it is not always possible to obtain a response from each university. A degree of caution must therefore be exercised when analysing the results, and especially when comparing the data.

3. Analysis and results of the survey

The data was collected from 33 institutions, in the period 2023-24, out of 62 AULC UK university members. The questionnaire has been completed and submitted by directors of language centres or coordinators of IWLP programmes in all cases but one. This represents a decrease of 28% in the number of institutions reporting, compared to the 2022-23 survey (46 institutions).

3.1. Number of students on IWLP-type courses

The number of students reported as enrolled on IWLP-type courses in the 2023-24 survey indicates a healthy intake. Although the total number of registrations is 14.2% lower than in 2022-23, from 58,747 to 50,381, see Table 1 (below), the intake appears stronger when compared on an institution-by-institution basis, as shown on Chart 4 (page 8). The average enrolment per responding institution is the highest recorded in over a decade (1,527, see Chart 1, page 5), but this figure masks significant differences between smaller and larger IWLPs. As illustrated in Chart 2 (page 6), the average is influenced by a small number of institutions with very large intakes, making it less representative of most providers. In contrast, the median enrolment (1,098) offers a more accurate reflection of typical registrations.

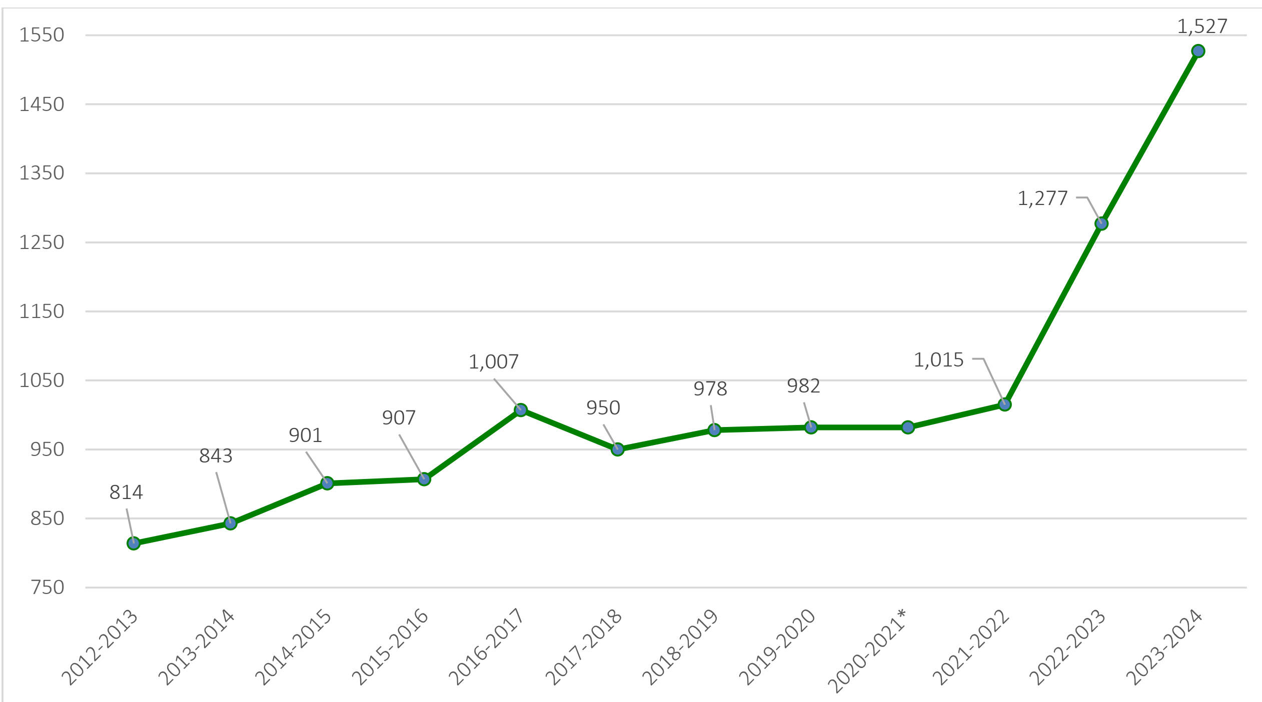
Table 1. Number of enrolments reported in the AULC-UCML surveys

Year	Registrations	AULC members (UK only)	HEIs reporting (inc. non-AULC members)	Average registrations per institution	Median registrations per institution
2012-2013	49,637		61	814	
2013-2014	53,971		64	843	
2014-2015	54,975		61	901	
2015-2016	55,354		61	907	
2016-2017	62,455	54	62	1,007	
2017-2018	53,200	61	56	950	
2018-2019	53,772	64	55	978	
2019-2020	45,164	63	46	982	
2020-2021*	N/A	66	-	-	
2021-2022	40,590	65	40	1,015	
2022-2023	58,747	61	46	1,277	
2023-2024	50,381	61	33	1,527	1,098**

Survey in 2020-21 conducted jointly with a UCML survey of degree-awarding departments. No quantitative data collected

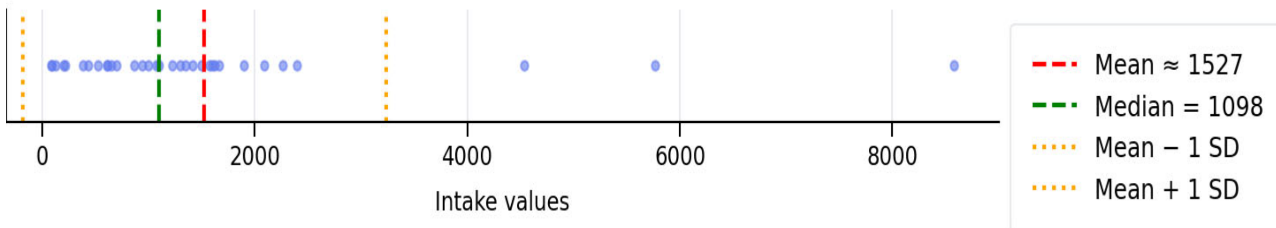
The distribution of enrolments across the 33 reporting institutions further highlights the uneven nature of IWLP provision. Intake figures vary widely, from as few as 84 students to as many as 8,581, indicating substantial differences in scale across the sector. While the mean, or average, and median figures provide useful reference points, their comparison reveals important insights. The higher mean relative to the median indicates a right-skewed distribution, where a small number of very large programmes raise the average (Table 1, page 4). As a result, the mean is less representative of a typical institution, whereas the median offers a more reliable indication of the scale at which most institutions operate. The standard deviation, which measures how far individual values tend to differ from the average, is also notably high (approximately 1,710). This confirms that variation is not minor but structural, with institutions regularly deviating from the average by large margins. Taken together, these measures show that IWLP provision is not only diverse but unevenly distributed, and that understanding the spread of the data is essential for interpreting the sector accurately.

Chart 1. Average number of registrations per responding institution



This variability reflects bigger institutional differences that cannot be fully explained through quantitative data alone. Evidence from sector reports indicates that IWLP provision varies widely in its organisation, scope and role within institutions, depending on how language teaching is structured and prioritised. While many institutions share broadly similar pedagogical aims, their organisational models differ, with provision located in language centres, academic departments or hybrid structures (see point 3.12, Organisational structures on page 30). These differences are shaped by a range of factors, including access to internal and external funding, the scale and stability of staffing, leadership and strategic support and the level of integration with degree programmes. Student demand, institutional mission and wider policy and economic contexts also play important roles. Furthermore, uneven access to language provision and beginner-entry pathways reflects structural features of the education system that can limit opportunities for language learning and progression (De Medeiros and Cazzoli, 2026)[2]. Together, these factors create a complex landscape in which differences in enrolment reflect not only levels of demand, but also variations in institutional capacity and strategic choices.

Chart 2. Mean vs Median Vs Standard Deviation

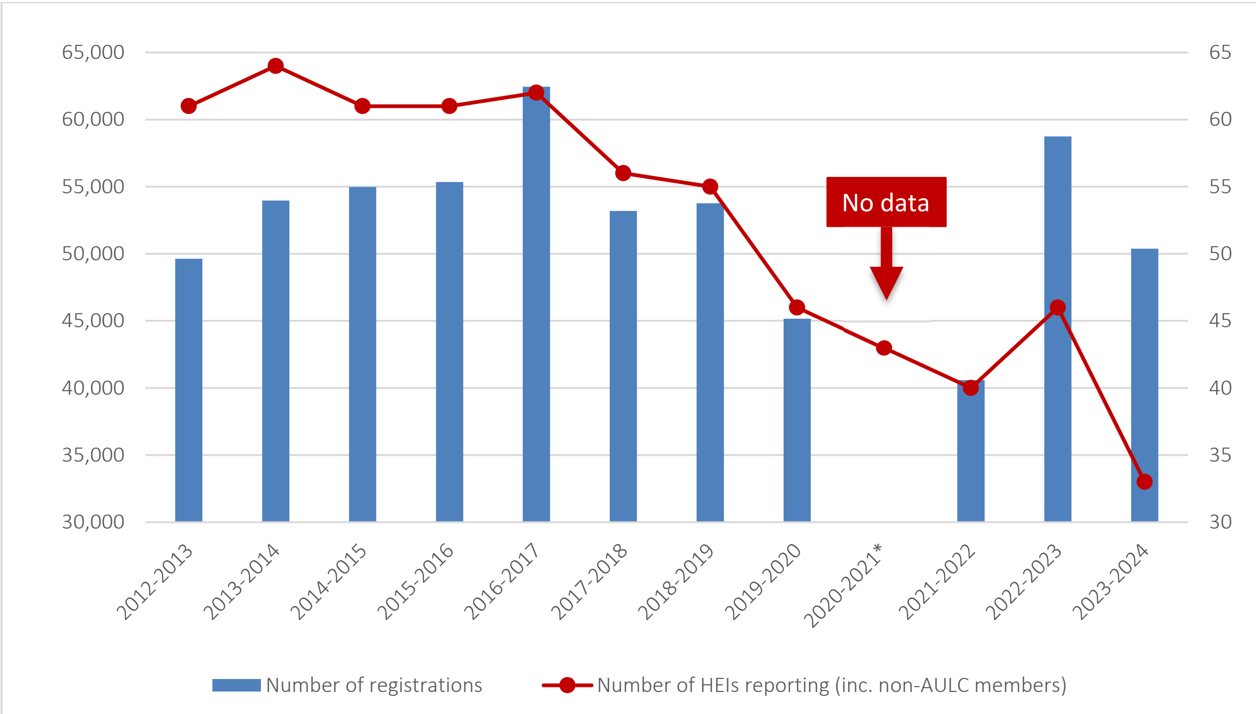


In this context, the data is valuable not only for describing levels of participation but for revealing patterns of concentration and disparity across the sector. It highlights the presence of a small number of large, seemingly well-established programmes alongside a wider group of smaller ones that are perhaps more susceptible to a range of internal and external influences, with important implications for sustainability and future development. Understanding these dynamics is particularly important in a challenging environment, where resource constraints and strategic priorities shape provision. A more nuanced, qualitative approach is therefore needed to complement quantitative analysis and to better understand how IWLPs operate, evolve, and can be effectively supported across the sector.

The current data suggests that the stability observed in previous years is under increasing pressure, with a range of factors reshaping the landscape of provision. Evidence indicates that while provision is expanding in some institutions, it is declining in others, continuing a previously identified trend towards the concentration of provision in a smaller number of larger centres. This development warrants close attention, particularly as it may contribute to growing regional disparities and increased geographical concentration of access to language provision.

[2] De Medeiros, A. M. S. A. and Cazzoli, M. (2026) *Modern languages has a future – and it's all about access*. Wonkhe, 27 May 2026. Available at: https://wonkhe.com/blogs/modern-languages-has-a-future-and-its-all-about-access/

Chart 3. Number of reported registrations to IWLP 2023-24



The longitudinal data presented in the above Chart 3, provides important context for understanding recent patterns in IWLP enrolment. The number of registrations (blue bars) shows a general upward trend from 2012-13 to a peak around 2016-17, followed by a decline through to 2020-21, most likely and predominantly due to the COVID pandemic. Although data for 2021-22 is not available, registrations appear to recover in 2022-23 before declining again in 2023-24, quite probably due to a decrease in reporting institutions. This pattern suggests that, while participation remains relatively strong in historical terms, the trajectory is no longer consistently upward and is instead characterised by fluctuation and recent contraction.

The number of reporting institutions (red line) follows a similar but more pronounced downward trend. After remaining relatively stable at around 60/63 in the earlier years, the number of reporting HE institutions declines steadily from 2016-17 onwards, reaching its lowest point in 2023-24. This reduction is significant, as it indicates a shrinking reporting base and potentially reflects broader sectoral changes, including restructuring, consolidation, or reduced participation in IWLP provision. This would require further research in this area, especially if the trend sustains or deepens.

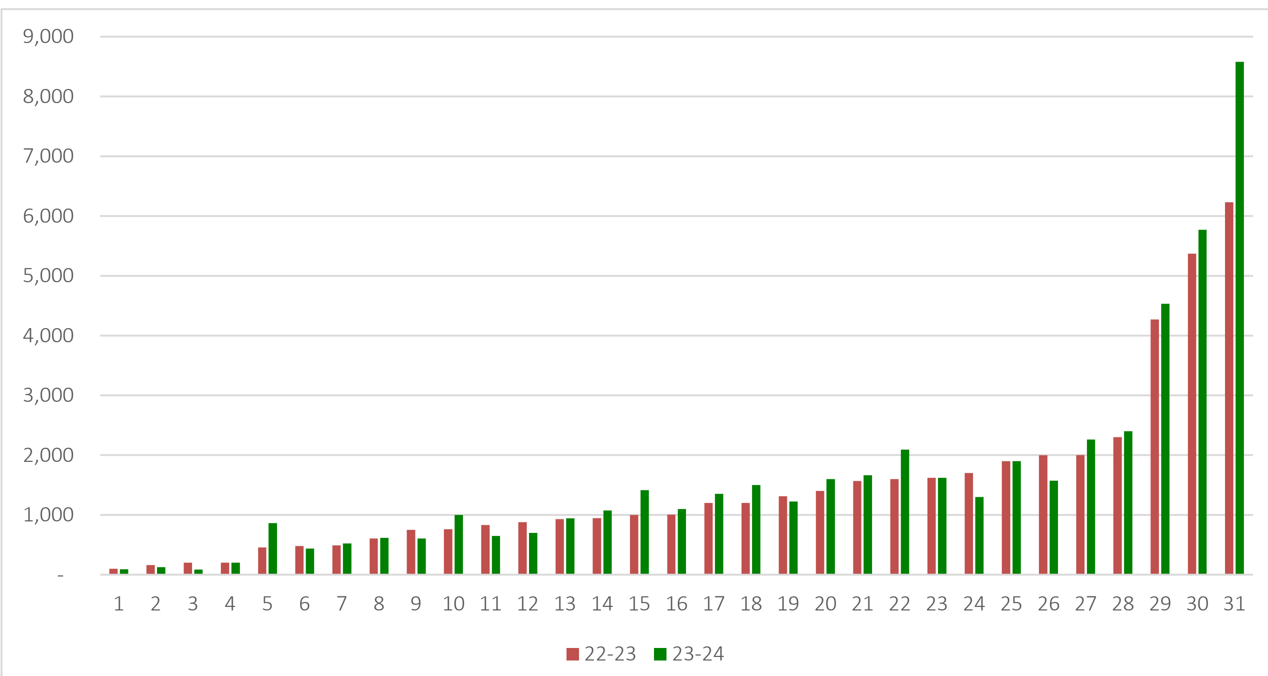
Taken together, the two series highlight an important divergence between total registrations and institutional participation. While registrations remain comparatively high, they are increasingly concentrated, as described before, within a smaller number of institutions. This reinforces the pattern identified in the cross-sectional analysis, where provision appears to be expanding in some institutions while contracting or disappearing in others. The data therefore supports the interpretation of a sector undergoing gradual consolidation, with activity becoming more concentrated in larger or more resilient programmes.

At the same time, the absence of data for 2021-22 introduces an element of uncertainty in interpreting short-term trends, particularly in the context of the pandemic and its aftermath. Nevertheless, the longer-term pattern suggests that the stability previously observed in IWLP provision is giving way to a more dynamic and uneven landscape.

3.2. Comparable intake 22-23 to 23-24

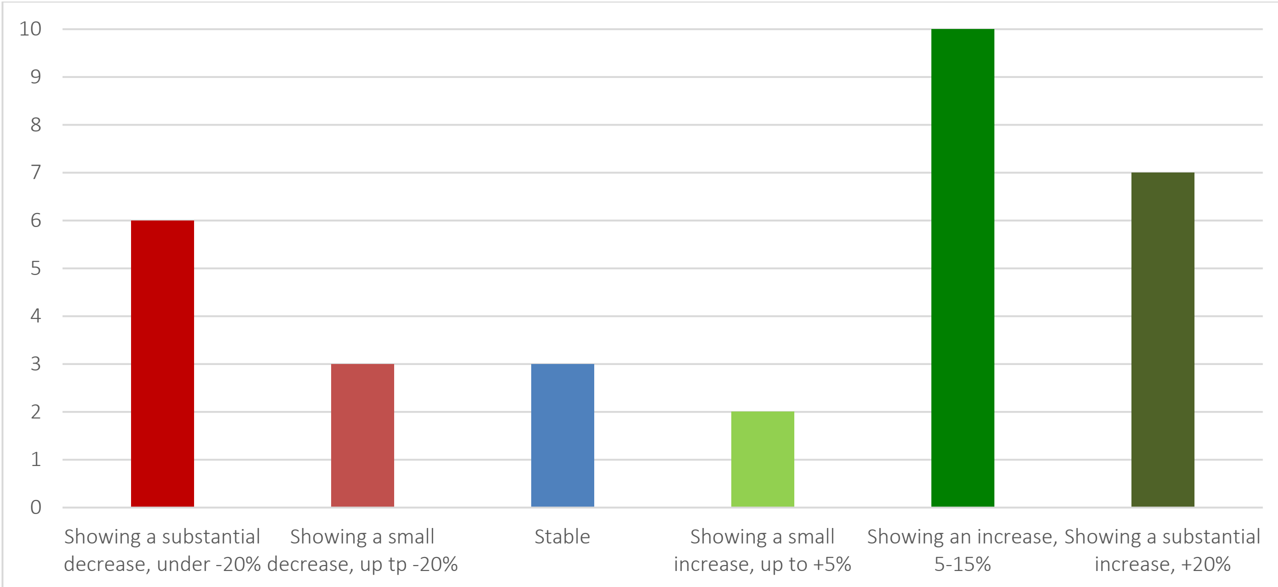
Given the 28% reduction in the number of responding institutions from 46 in 2022-23 to 33 in 2023-24, direct comparison of intake across the two surveys must be treated with caution. However, a matched analysis of the 31 institutions that participated in both years provides a more reliable basis for comparison. Within this consistent group, total intake increased from 45,461 in 2022-23 to 49,782 in 2023-24, indicating a clear rise in registrations within the IWLPs among reporting institutions.

Chart 4. Comparison of intake across 31 institutions



The distribution of institutional changes further supports this trend. A substantial number of institutions reported moderate to significant increases in intake, including 10 institutions with increases between 5% and 15%, and 7 institutions with increases above 20%. By contrast, fewer institutions experienced declines, with 6 reporting substantial decreases and smaller numbers reporting minor decreases or stability. Taken together, these patterns suggest that growth is not limited to a small number of outliers but is relatively widespread across the reporting group.

Chart 5. Percentage trend comparison of intake 2022-23 and 2023-24

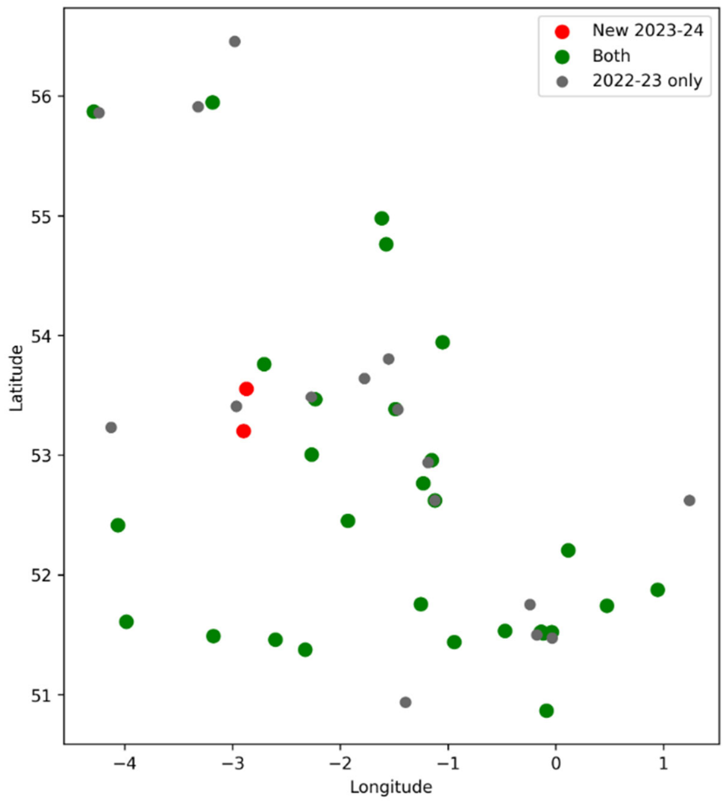


On the whole, these findings point to a healthier intake and positive short-term outlook for the institutions included in the matched sample. However, this positive picture should be interpreted carefully. The reduction in the number of participating institutions means that it is not possible to determine whether similar trends are evident across the full sector. It remains unclear whether the strong performance of the reporting institutions reflects wider sector growth or a redistribution of learners between institutions. For example, if some non-reporting institutions experienced declines or reduced recruitment. As a result, while the data indicates strengthening demand within the reporting group, it does not provide a complete picture of wider sector dynamics.

The spatial distribution (Chart 6, page 10) indicates that the reduction in reporting institutions is geographically widespread rather than concentrated within a particular region of the UK. In several urban and institutionally dense areas, institutions that ceased reporting are located close to institutions that continued to participate. This proximity makes local redistribution of students geographically plausible, particularly where alternative providers are within reasonable travelling distance.

Institutions located in the same city are represented by shared or near-identical coordinates, which may result in overlapping points on the map. Consequently, the figure illustrates spatial distribution rather than the precise number of institutions in each location.

Chart 6. Distribution of reporting institutions in the UK in 2022-23, in 2023-24 and in both years



However, the map does not show a consistent pattern whereby every institution that ceased reporting has a nearby continuing provider. In several parts of the UK, institutions that no longer reported have no obvious geographical alternative, suggesting that redistribution opportunities would have been limited in those areas. Considered alongside the observed increase in registrations among continuing providers, the spatial evidence supports a mixed interpretation: some local redistribution of students is likely to have occurred, but the overall increase in registrations is unlikely to be explained solely by redistribution and is also consistent with genuine growth in demand for language learning.

3.3. Analysis of languages offered by institutions

The 2023-24 survey asked respondents to indicate which languages their HEI offered and whether this offer is through credit-bearing modules or course units, as non-credit bearing courses (day or evening), at elementary levels, at level B1, B2 and B2 and above, online or not at all.

The table below (Table 2, page 11) provides a structured overview of language provision across institutions, combining information on availability, mode of delivery and level of study. It lists each language alongside the number of institutions offering it, distinguishing between credit and non-credit provision, and further breaking this down into levels such as elementary, intermediate (B1, B2), and more advanced stages. It also includes information on specialised formats, such as specific-purpose courses, in-person teaching, and online delivery.

A clear pattern emerges in the distribution. A small group of languages, including French, Spanish, German, Japanese, Chinese (Mandarin) and Italian, is offered widely across the sector, often across multiple levels and modes. These languages tend to have both strong credit and non-credit provision, as well as a broader range of progression routes. By contrast, many other languages are offered by far fewer institutions and often with more limited levels or delivery formats.

Table 2. Number of IWLP offering languages per course type

Languages	Available	Credit	Non-credit	Elementary (A1-A2)	B1	B2	Above B2	Specific purposes	In person	Online
Arabic	27	18	21	23	12	4	1	4	21	8
Bengali	2	1	2	2					1	
British Sign Language	17	9	16	15	4	1		1	14	3
Catalan	6	6	3	6	4	2	1		6	
Chinese (Cantonese)	1		1	1	1					1
Chinese (Mandarin)	30	22	24	26	18	9	3	3	22	9
Czech	2	2	1	2	2	1	1		2	
Danish	2	2		2					2	1
Dutch	9	3	8	9	3	2	1		6	6
EFL/ESOL (not EAP)	7	4	6	2	2	5	5	4	7	
French	33	25	27	28	27	26	21	6	30	12
German	31	24	26	28	25	22	14	6	27	11
Greek (ancient)	5	3	3	5	1	1	1		4	1
Greek (modern)	11	4	10	11	1	1			8	4
Hebrew (ancient)	1		1							
Hebrew (modern)	1		1	1					1	
Hindi	2		2	2					1	2
Italian	28	20	23	27	18	11	5	4	24	11
Japanese	31	21	26	28	20	9	3	2	24	7
Korean	15	7	12	14	5	1	1		11	2
Latin	9	5	8	8	3	1	1	1	7	3
Norwegian	4									
Persian	4	2	3	4					4	
Polish	4	2	4	4	1				4	
Portuguese	15	9	12	15	6	4	3	3	14	7
Russian	22	15	18	21	10	5	3	1	19	5
Scottish Gaelic (Gàidhlig)	2	2	2	2	1	1	1		2	1
Spanish	32	25	26	28	27	26	20	6	27	12
Swahili	2	2	2	2				1	2	1
Swedish	5	2	4	5	3				2	2
Turkish	6	2	6	6					5	1
Ukrainian	3	2	2	3					1	
Urdu	2	1	2	2					2	
Welsh (Cymraeg)	2	1		1			1		1	

The table also shows that most languages are available in both credit and non-credit formats, although the balance varies. In many cases, non-credit provision slightly exceeds or complements credit provision, suggesting flexibility in how courses are delivered. In addition, the presence of online and specific-purpose courses indicates growing diversification in delivery models.

By and large, the table highlights both the strength and concentration of provision in a core set of languages, and the more limited and uneven availability of others, setting the basis for a more detailed analysis of patterns, gaps, and trends in IWLP provision.

3.4. Languages offered by institutions

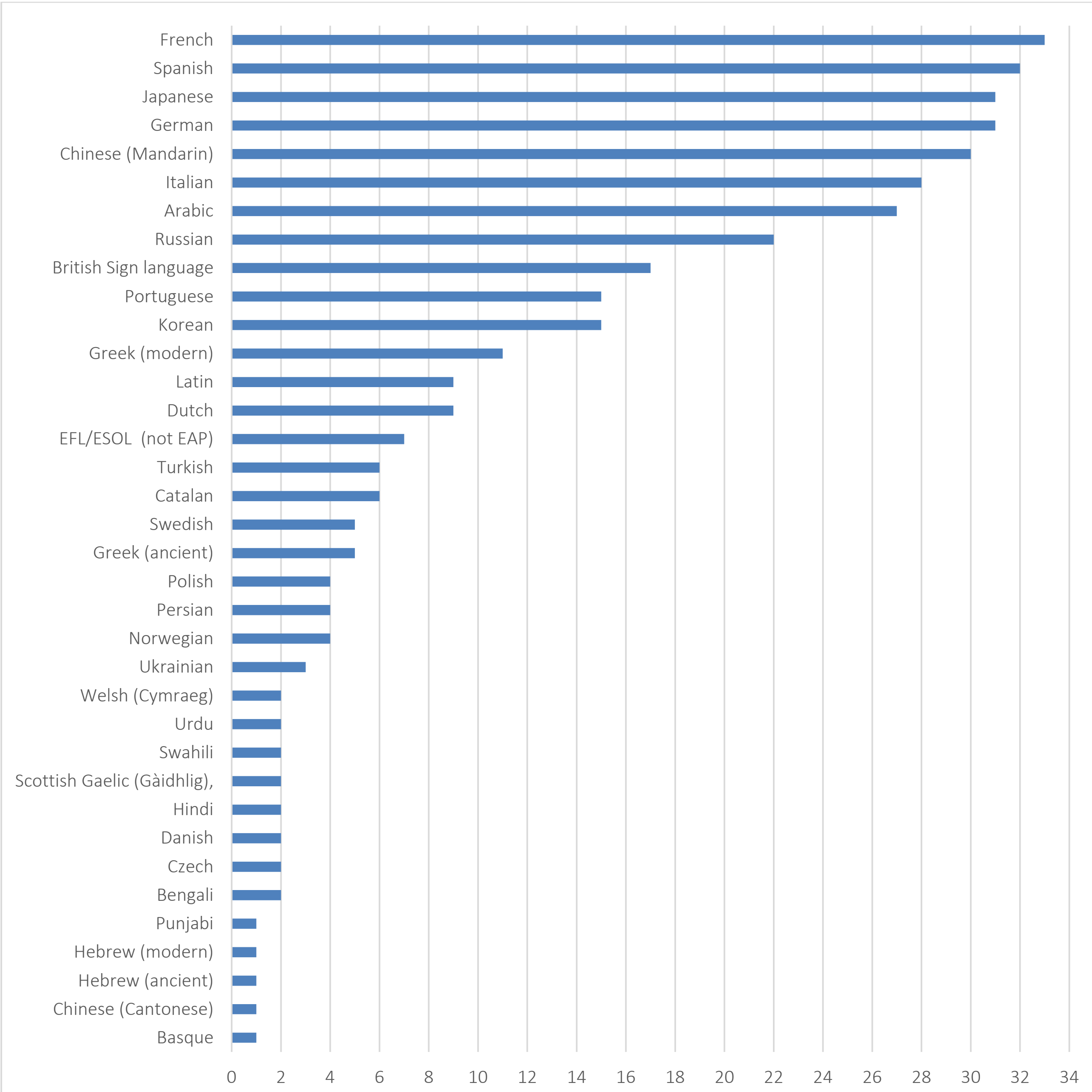
Chart 7 (page 13) shows a clear hierarchy in the range of languages offered across institutions. French and Spanish are the most widely available languages, each offered by over 30 institutions, confirming their dominant position within IWLP provision. They are closely followed by Japanese and German, and then by Chinese (Mandarin) and Italian, all of which are also offered at high levels across the sector. This indicates that provision is not limited to traditional European languages, but also reflects sustained demand for key global languages, particularly those linked to economic and cultural influence.

A second tier of provision includes languages such as Arabic, Russian, British Sign Language (BSL), Portuguese, and Korean. These are offered by a moderate number of institutions, suggesting growing or stable interest but more limited capacity or institutional coverage. The presence of BSL in this group is notable, as it reflects increasing recognition of inclusive language provision and the importance of accessibility within higher education.

Beyond this, there is a long tail of less widely offered languages, including Greek (modern), Latin, Dutch, Turkish and Scandinavian languages, followed by a range of community and regional languages such as Welsh, Urdu, Swahili, Hindi, Punjabi, and Bengali. These languages are offered by only a small number of institutions. This distribution highlights potential gaps or “cold spots” in provision, where certain linguistic and cultural areas are underrepresented despite their relevance in global or local contexts.

The concentration around a small group of widely taught languages suggests that provision is shaped by demand, staffing capacity and historical priorities. However, the limited availability of less widely taught languages raises important questions about the breadth and inclusivity of IWLP provision. Community languages, in particular, play a key role in reflecting the linguistic diversity of the UK and supporting student identity and engagement. Expanding these offers can strengthen connections between universities and their local communities.

Chart 7. Number of institutions offering each language



Mostly, the data suggest that while IWLP provision is strong in core languages, it remains uneven across the wider linguistic landscape. Maintaining diversity in language offerings, including support for smaller and community languages, is important for both educational value and social inclusion. The inclusion of BSL within the offer further reinforces the need to view language provision in a broader and more inclusive sense.

3.5. Trends in credit and non-credit bearing provisions

The data presented in the graphics indicate that participation in IWLP programmes in 2023-24 is characterised by a degree of stability, with many institutions reporting little change in student numbers. However, this stability should not be interpreted as evidence of a static system. There are signs of change, particularly a gradual shift towards non-credit-bearing provision alongside constraints on credit-bearing opportunities.

Non-credit provision shows relatively stronger growth and resilience. Several institutions report increases or sustained demand in this area, often supported by flexible delivery formats, targeted promotion and accessibility for a wider range of learners. By contrast, credit-bearing provision appears more restricted. Declines, or the absence of such provision, are more common and are frequently linked to structural factors such as timetabling limitations, curriculum reform, and reduced institutional capacity. This suggests that the balance between the two forms of provision is changing, with non-credit models becoming more prominent.

Chart 8. Trends of credit and non-credit provisions by number of institutions

This shift is especially visible in larger, research-intensive institutions (Russell Group), where high demand is increasingly accommodated through non-credit formats due to limited space within degree structures. In these contexts, non-credit provision functions as a flexible alternative to formal curricular integration. In contrast, smaller and medium-sized institutions tend to retain a greater proportion of credit-bearing provision, particularly where IWLP remains closely linked to Modern Foreign Languages departments. However, these models are not necessarily more stable, as they remain sensitive to financial pressures and institutional restructuring.

The wider context is made more complex by the variation observed across institutions. Some report growth, others decline, and others stability, reflecting the importance of local conditions such as funding, staffing and strategic priorities. As a result, there is no single sector-wide trend, but rather a set of differentiated institutional responses.

Moreover, the dataset does not fully capture the broader context in which these changes are taking place. A reduced number of reporting institutions, combined with mounting financial pressures across higher education, limits the extent to which the data reflect sector reality. At the time of reporting, many universities were facing budget constraints, with the humanities undergoing contraction through restructuring and closures. These developments are likely to have affected language provision in ways that are not fully visible in the data.

Taken together, the findings suggest that apparent stability masks a process of reconfiguration. While participation levels may appear unchanged, the underlying structure of IWLP provision is shifting. There is a clear movement towards more flexible, non-credit models, alongside reduced capacity and access within credit-bearing routes. This reflects not a decline in demand, but the impact of institutional constraints and changing priorities. IWLP provision should therefore be understood as part of a sector in transition, rather than a stable or settled landscape.

3.6. Comparative credit and non-credit bearing languages offered by institutions

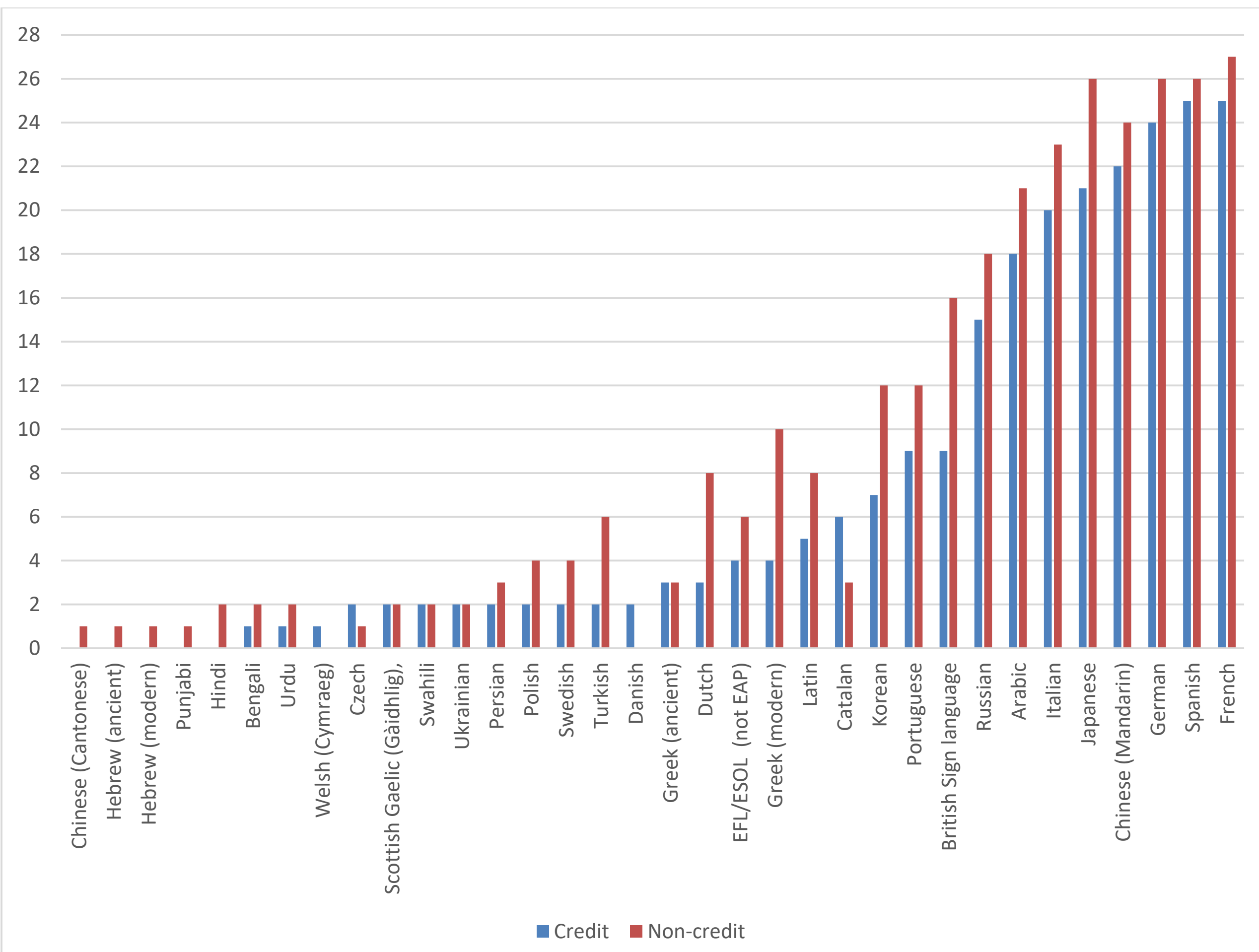
The Chart below (Chart 9, page 16) provides a comparative view of language availability by institution, distinguishing between credit (blue bars) and non-credit (red bars) provision. A clear pattern emerges across the distribution, reinforcing and refining the trends identified earlier.

At the upper end of the chart, widely taught languages such as French, Spanish, German, Mandarin Chinese, Italian and Japanese show consistently high levels of provision in both formats. However, in almost all cases, non-credit provision slightly exceeds credit provision. For example, French and Spanish both approach and exceed 25 institutions in non-credit delivery, compared to slightly lower figures for credit courses. This confirms a general tendency for institutions to expand access through more flexible, non-credit routes while maintaining a strong but comparatively constrained credit offer.

In the middle range, languages such as Russian, British Sign Language, Portuguese, Korean and Arabic display a similar pattern, though at a lower scale. Here, the difference between credit and non-credit provision is often more pronounced. British Sign Language, in particular, stands out with noticeably higher non-credit availability. This supports the earlier observation that BSL is often delivered through more flexible and inclusive formats, which may not always be embedded within formal credit structures, or accredited through external awarding bodies such as Signature.

Further down the distribution, for languages with more limited availability, non-credit provision frequently becomes the dominant or sole mode of delivery. Languages such as Modern Greek, Dutch, EFL/ESOL and several smaller European and community languages often show equal or higher non-credit presence, and in some cases, minimal or no credit provision. This indicates that non-credit courses play a key role in sustaining less widely taught languages, where embedding them within degree programmes may not be viable.

Chart 9. Number of HEIs offering credit and non-credit bearing IWLP by language



At the lowest end of the chart, languages such as Cantonese, Basque, Punjabi and others are offered by only one or two institutions, with provision typically restricted to non-credit formats.

This highlights the reliance of these languages on niche provision and local expertise, reinforcing the idea of uneven coverage across the sector.

In general, the data confirms a consistent structural pattern. While widely taught languages retain strong provision across both modes, non-credit delivery is generally more extensive and flexible, particularly as availability decreases. This reinforces the broader shift identified earlier towards non-credit provision, perhaps not as a replacement for credit courses, but as a complementary mechanism that allows institutions to maintain breadth and respond to demand within existing constraints.

3.7. Language Trends

The table below (Table 3, page 18) presents a more detailed view of language trends by combining availability with reported increases and decreases. Generally, it shows a mixed but structured pattern, where growth is concentrated in some areas, while decline manifests in others.

A first key observation is that several languages with moderate or low availability appear to experience strong growth rates. This trend requires careful interpretation, as growth does not necessarily correspond to wider availability or sustained popularity. In some cases, increases are driven by very small numbers. For example, Cantonese shows a 100% increase, but this reflects the fact that it is newly offered by a single institution rather than a broad expansion across the sector. Similarly, Hindi, Scottish Gaelic, and Welsh each show growth of around 50%, despite being available in only two institutions. British Sign Language (BSL) stands out in this group, with 17 institutions offering it and a high growth rate of 76%. This suggests that while these languages are not yet widely available, they are gaining momentum where they are offered. In particular, the strong growth of BSL indicates increasing institutional recognition of inclusive and accessible language provision.

A second pattern concerns languages with medium to high availability that are still expanding. Dutch, Spanish, Korean, Japanese, German, Arabic and Italian all show positive trends, with increases ranging from around 11% to 44%. Spanish and Japanese in particular combine high availability (over 30 institutions) with continued growth. This indicates sustained demand and suggests that these languages are not yet at the saturation point. In contrast to the previous group, these languages benefit from both established provision and ongoing expansion.

At the same time, a group of languages appears to have reached relative stability. French, despite being the most widely offered language (33 institutions), shows a slight decline (-6%), while several smaller languages such as Swedish, Danish, Punjabi and Swahili show no significant change. This may indicate that provision has plateaued, with stable but not expanding demand. In some cases, stability may reflect limited capacity rather than a lack of interest.

Table 3. Language Trends

Languages	Showing decrease	Stable	Showing increase	Availability	Trend	% Trend
Chinese (Cantonese)			1	1	Showing an increase	100%
British Sign Language		4	13	17	Showing an increase	76%
Hindi		1	1	2	Showing an increase	50%
Scottish Gaelic (Gàidhlig)		1	1	2	Showing an increase	50%
Welsh (Cymraeg)			1	2	Showing an increase	50%
Dutch		5	4	9	Showing an increase	44%
Greek (ancient)		1	2	5	Showing an increase	40%
Spanish	2	17	12	32	Showing an increase	31%
EFL/ESOL (not EAP)	1	3	3	7	Showing an increase	29%
Korean	3	5	7	15	Showing an increase	27%
Japanese	6	10	14	31	Showing an increase	26%
German	5	14	11	31	Showing an increase	19%
Arabic	6	11	10	27	Showing an increase	15%
Italian	6	12	9	28	Showing an increase	11%
Turkish	1	3	2	6	Showing an increase	17%
Latin	2	3	3	9	Stable	11%
Basque		1		1	Stable	0%
Danish		2		2	Stable	0%
Greek (modern)	2	6	2	11	Stable	0%
Hebrew (ancient)		1		1	Stable	0%
Hebrew (modern)		1		1	Stable	0%
Punjabi		1		1	Stable	0%
Swahili		2		2	Stable	0%
Swedish	1	3	1	5	Stable	0%
French	8	19	6	33	Stable	-6%
Portuguese	5	6	4	15	Stable	-7%
Catalan	2	3	1	6	Showing a decrease	-17%
Persian	1	3		4	Showing a decrease	-25%
Chinese (Mandarin)	12	16	1	30	Showing a decrease	-37%
Russian	13	6	3	22	Showing a decrease	-45%
Bengali	1	1		2	Showing a decrease	-50%
Czech	1	1		2	Showing a decrease	-50%
Polish	2	2		4	Showing a decrease	-50%
Urdu	1	1		2	Showing a decrease	-50%
Ukrainian	2	1		3	Showing a decrease	-67%

In contrast, the figures also highlight a set of languages experiencing decline, particularly among those with higher availability. Mandarin Chinese, Russian and Portuguese show notable decreases, with Russian declining by 45% and Mandarin by 37%, despite being offered in 22 and 30 institutions respectively. This is significant, as it suggests that even well-established languages are vulnerable to changing demand, geopolitical factors, or institutional constraints. Smaller languages such as Bengali, Czech, Polish and Urdu also show declines, although their already limited availability amplifies the impact of small changes.

Taken together, these patterns point to a rebalancing of language provision rather than uniform growth or decline. Growth seems strongest in emerging, community and inclusive languages, while some traditionally strong or widely taught languages are stabilising or contracting. This creates both opportunities and risks. On the one hand, increasing interest in languages such as BSL, Welsh and Hindi supports arguments for diversification and inclusion. On the other hand, declining trends in widely offered languages highlight the need for sustained support to maintain a breadth of provision.

All in all, the data reinforces the idea of a dynamic and uneven landscape, where language provision is shaped by local demand, institutional priorities and wider social and political factors.

3.8. Changing preferences for languages

As this survey did not seek to collect numbers of registrations in each language, it cannot further comment on language trends beyond the data above relating to the breadth of languages offered in different course types.

3.9. Availability of Language Levels

The chart (Chart 10, page 20) shows the distribution of language provision across proficiency levels from elementary A1-A2 to above B2. It reveals a clear pattern in which provision is strongest at the lowest levels and declines steadily at each higher stage.

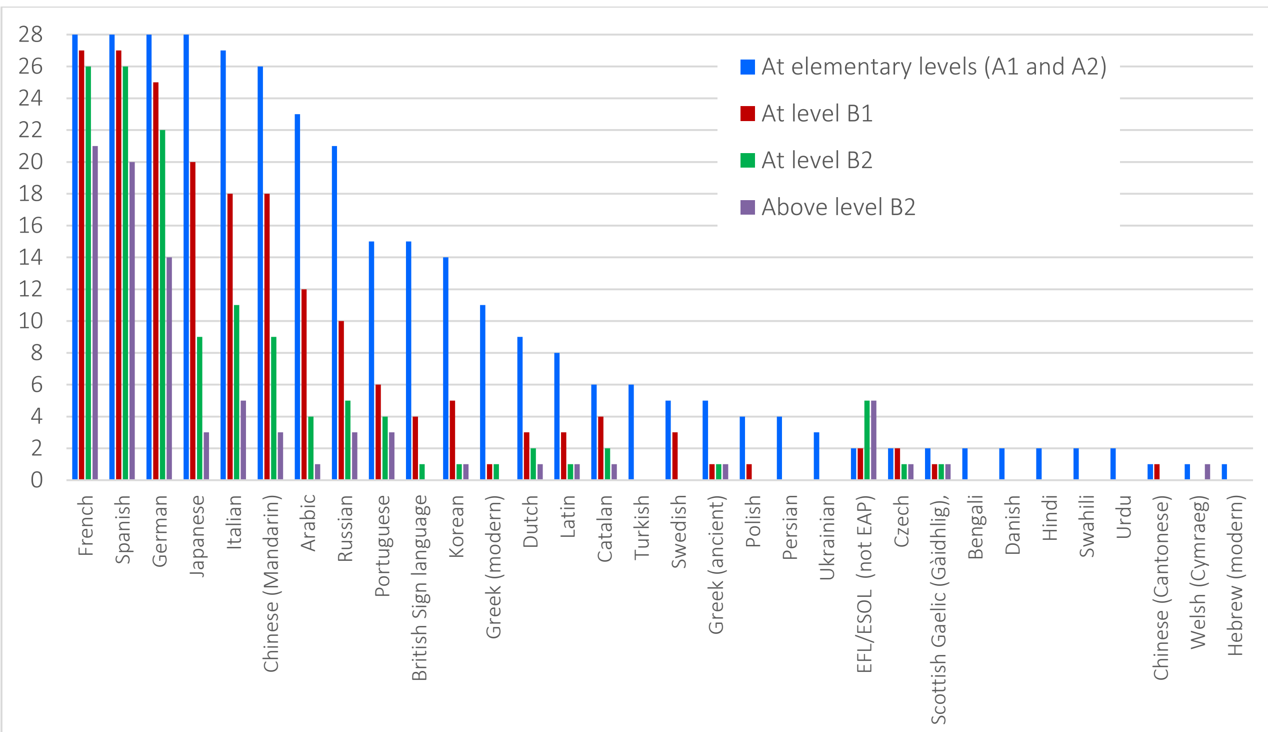
Across all languages, elementary provision A1-A2 is the most widely available. In every case, the number of institutions offering elementary courses exceeds those offering B1. On average, B1 provision is around 40% lower than at elementary levels. This gap highlights the central importance for institutions of offering beginners or ab initio provision as the main entry point into language study. This applies to widely taught languages such as French, Spanish, German, Japanese, Italian and Mandarin Chinese, where elementary provision reaches the highest values on the chart. B1 remains well represented but is consistently lower than elementary levels. This indicates that provision is still primarily focused on beginner levels.

A second pattern is the continued decline beyond B1. Provision at B2 drops further across all languages, including the most widely taught ones. While languages such as French, Spanish and German retain a noticeable presence at B2, the reduction from both elementary and B1 is clear. At levels above B2, provision becomes very limited and is only available in a small number of institutions.

For languages such as Arabic, Russian and British Sign Language, provision extends into B1 and in some cases B2 but falls sharply at higher levels. For smaller or less widely taught languages, including Welsh, Punjabi, Swahili and Urdu, provision is largely restricted to elementary levels with only minimal availability beyond that.

By and large, the chart highlights a system in which provision is concentrated at the beginner level. There is some continuity into B1 and more limited progression to B2, while progression beyond B2 is lower still and mainly confined to widely taught languages such as French, Spanish, German, Italian and English. In the context of HE, the strong presence of beginners or ab initio provision reflects a trend in both educational background and learner profile. Fewer students now take languages at GCSE and A-level, which reduces the pool of students who can enter at higher levels. At the same time, more members of the public are accessing language courses through higher education institutions.

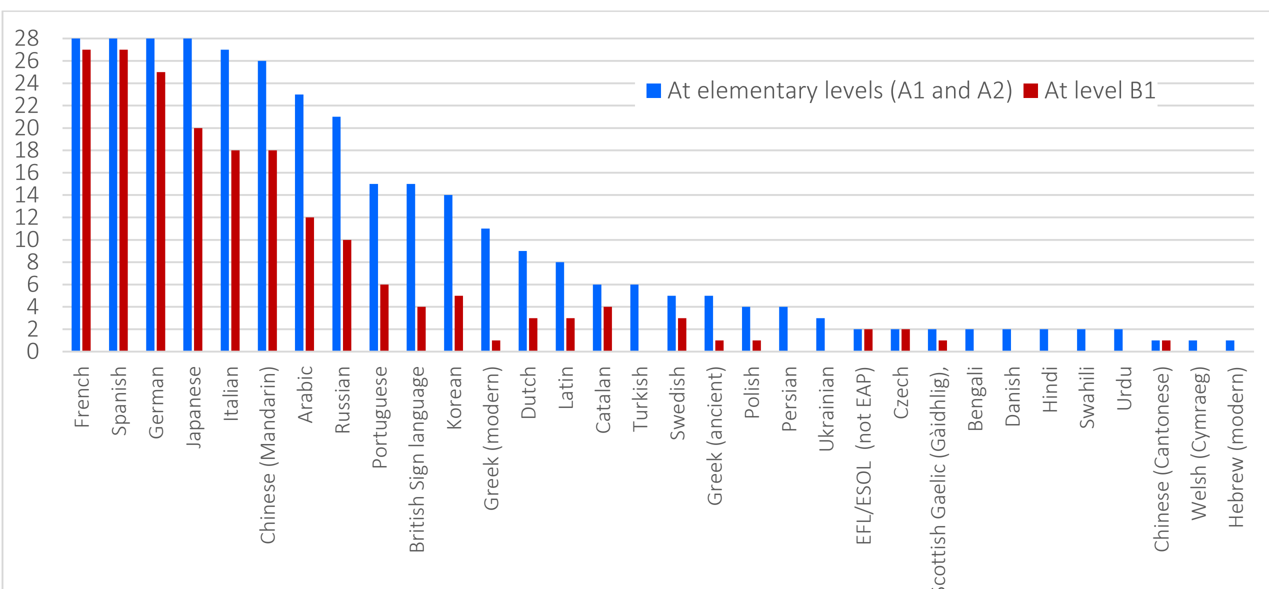
Chart 10. Levels offered by HE institutions in each language



The focused comparison between elementary and B1 reveals several structured patterns across groups of languages that go beyond a simple decline. First, the most widely taught languages, such as French, Spanish and German, form a distinct group characterised by a high retention pattern, where the drop from elementary to B1 is relatively small. Provision remains dense at both levels, suggesting that institutional capacity, staffing stability and established demand allow for a more consistent provision. A second group includes languages such as Japanese and Mandarin Chinese, where the decline is more noticeable despite strong elementary provision. This indicates a moderate progression/intake gap, which may reflect both the perceived difficulty of these languages and the greater time investment required to reach intermediate competence, factors that are well-documented in language acquisition research. A third group, including Arabic, Russian, Portuguese and even Korean and British Sign Language, shows a steeper decline between elementary and B1, with approximately half or fewer institutions continuing provision at the intermediate level. Here, the pattern suggests a combination of more limited institutional spread, smaller cohorts, and potentially greater challenges in maintaining viable class sizes beyond the beginner stage. Finally, smaller or less widely taught languages form a fourth group characterised by a minimal or discontinuous progression pattern, where elementary provision exists but B1 is very limited or absent. This points to structural constraints such as low enrolment numbers, specialist staffing, or the marginal position of these languages within institutional portfolios.

Examining these patterns together shows that the decline from elementary to B1 is not uniform but varies systematically by language group. While some reduction is expected as fewer learners progress, the scale of the drop appears linked to a combination of factors, including demand, institutional capacity or profile, and the relative complexity or perceived accessibility of the language. The comparison is therefore analytically important because it reveals not only that progression narrows, but that it does so in different ways depending on the language, highlighting underlying structural differences in how provision is sustained across the sector.

Chart 11. Comparative table of languages offered by HE institutions at the elementary (A1-A2) and intermediate level (B1)



The comparison between B1 and B2 provision reveals a further stage in the narrowing of availability, but the pattern is more differentiated than in the transition from elementary to B1. Across all languages, B2 provision is consistently lower than B1, yet the rate of decline varies clearly by language group, indicating different capacities to sustain progression/intake beyond the intermediate stage.

Widely taught European languages such as French, Spanish and German again form a distinct group, characterised by strong continuation into B2. Although there is a reduction from B1, provision remains relatively high, suggesting that these languages benefit from stable demand, established curricula and the institutional capacity to support longer learning pathways. A second group, including languages such as Japanese, Italian and Mandarin Chinese, shows a more noticeable but still sustained decline, with B2 provision clearly present but significantly reduced compared to B1. This pattern suggests that while progression is supported, fewer learners access or continue to this level, which may be linked to the greater effort and time required to reach upper-intermediate proficiency.

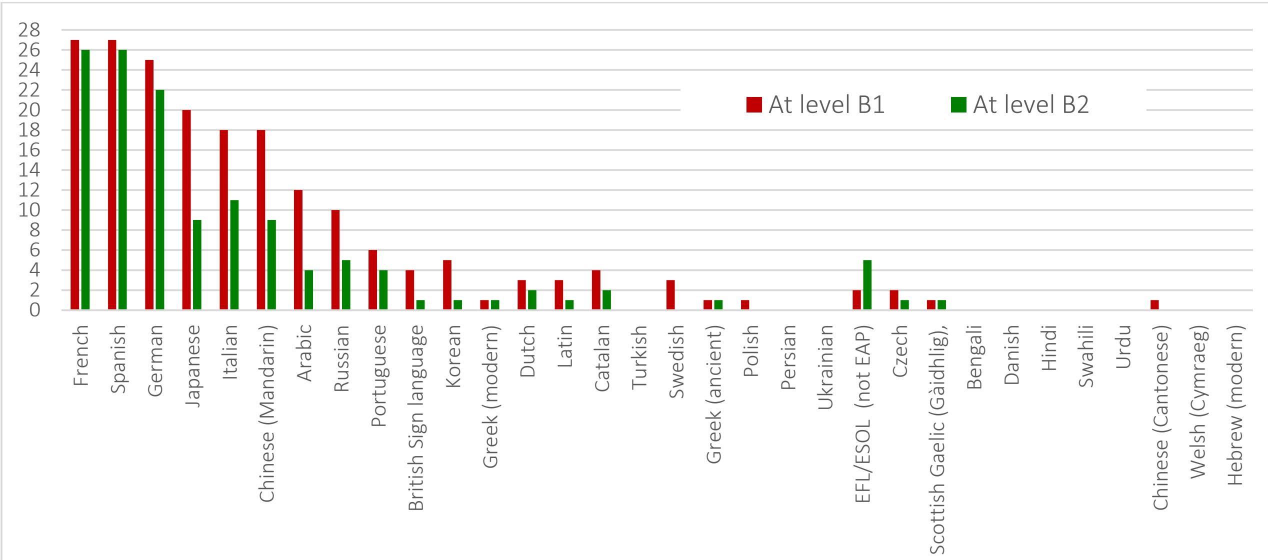
A third group, including Arabic, Russian and some mid-range languages, displays a steeper drop between B1 and B2, with B2 often representing less than half of B1 provision. This indicates a more fragile stage of intake or progression, where maintaining viable cohorts becomes more difficult and provision is less consistently available across institutions. Finally, smaller or less widely taught languages show a minimal or near-absent B2 presence, even where some B1 provision exists. In these cases, progression beyond the intermediate level appears structurally limited.

It is possible to speculate that this pattern is linked to the time required to reach B2. Under typical guided learning estimates, progression from beginner to B2 requires substantial cumulative study time. In lower-intensity contexts such as IWLPs, where students often engage for only a limited number of hours per week, this progression can extend over several years. Given that many learners study languages for a relatively short period within higher education, often between one and three years and not always continuously, the time available may not always align with the duration needed to reach B2.

An exception to this pattern can be observed in EFL ESOL (not EAP), where provision at B2 exceeds that at B1. Unlike other languages, where progression is marked by a consistent decline, this category shows a reversal, with more institutions offering upper intermediate courses than intermediate ones. This anomaly likely reflects the specific structure and purpose of English language provision, where learners are often placed directly at higher levels based on prior competence, and where demand for advanced proficiency is linked to academic or professional requirements. As a result, progression does not follow the same sequential pathway observed in other languages, and provision is shaped by different entry points and learner/institution needs.

On the whole, the comparison between B1 and B2 highlights that the key constraint is not only institutional provision, but it could also be the interaction between programme intensity, learner commitment and time available to progress. While some languages sustain progression more effectively, the general pattern suggests that reaching B2 within IWLP contexts represents a structural challenge shaped by both educational and, perhaps, temporal factors.

Chart 12. Comparative table of languages offered by HE institutions at intermediate (B1) and advanced (B2) levels



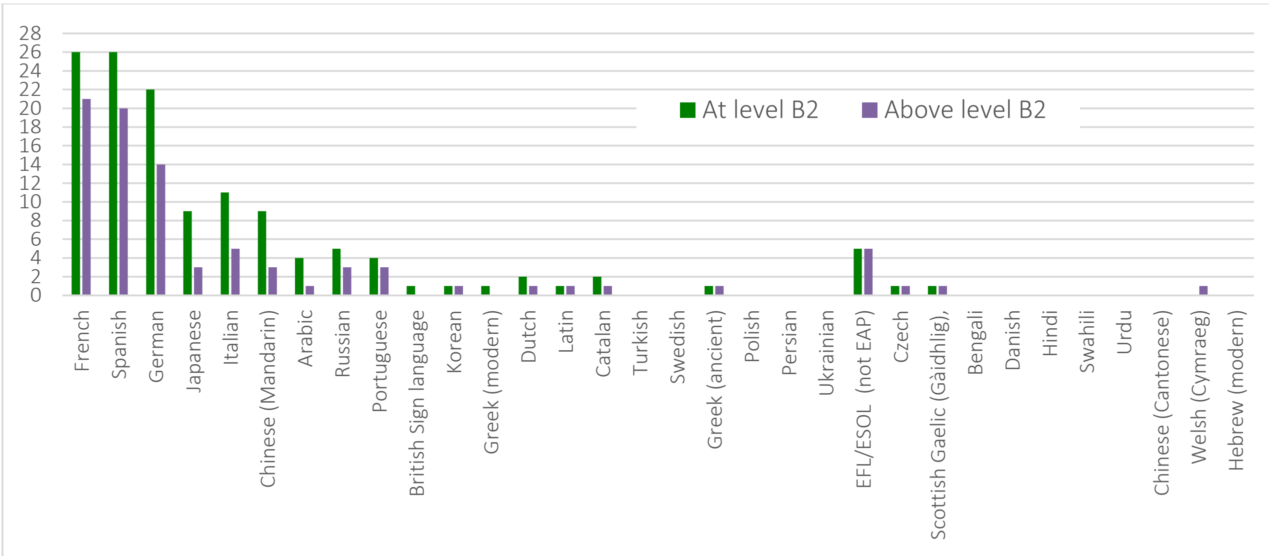
The comparison between B2 and levels above B2 (C1 and C2) reveals a further stage in the narrowing of provision, but with a more differentiated pattern than at earlier transitions. While availability at proficiency levels is generally lower than at B2, the rate of reduction varies considerably across languages. Widely taught languages such as French, Spanish and German show a clear decline from B2 to advanced levels, but still retain a visible presence at C1 and C2, indicating that progression beyond B2 is maintained, albeit at a reduced scale. A similar though slightly more marked reduction is observed in languages such as Japanese and Italian, where advanced provision remains available but is less widespread.

However, this pattern is not universal. In several languages, including Portuguese, Latin, Greek, Czech and Scottish Gaelic, the difference between B2 and above B2 provision is minimal. In these cases, availability at advanced levels remains close to that at B2, creating a plateau effect in which provision stabilises rather than continuing to decline. This suggests that once courses reach B2, they are sustained into higher levels, possibly reflecting more specialised provision aimed at smaller but committed cohorts.

By contrast, other languages show a much sharper contraction, in which B2 provision is already limited and availability at the proficiency levels becomes minimal or disappears altogether. This is the case for several less widely taught or more regionally distributed languages, where maintaining progress beyond the B2 level appears more difficult.

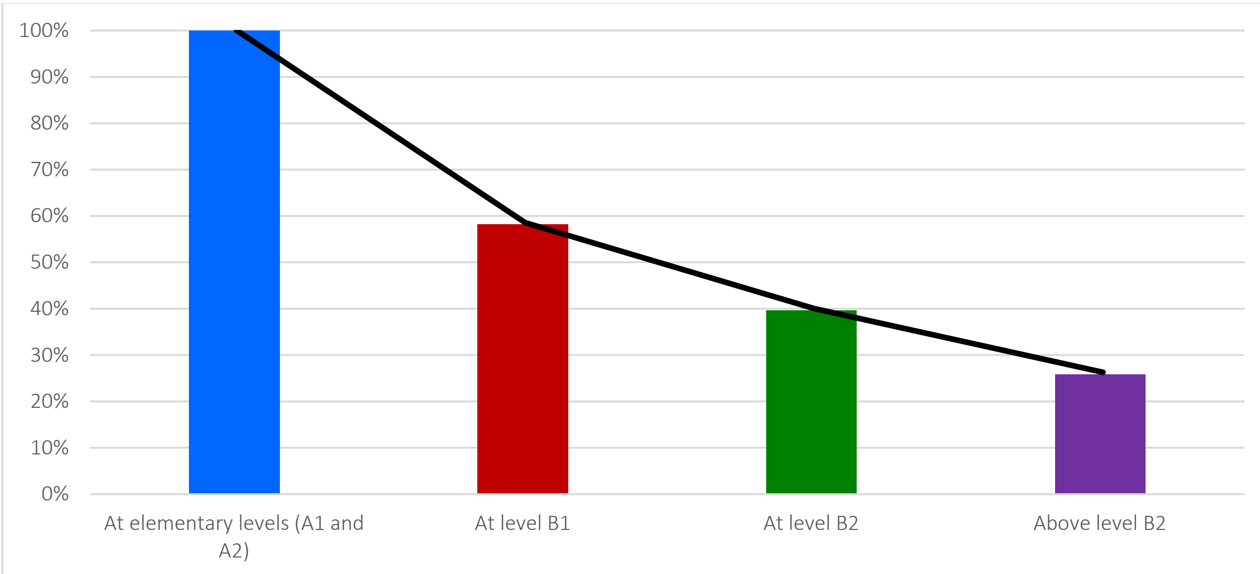
Taken together, these patterns indicate that progression beyond B2 does not follow a single trajectory. Instead, it reflects different modes of provision: gradual reduction in widely taught languages, stabilisation in some specialised or niche areas, and rapid contraction where provision is more fragile. This highlights that advanced levels represent not simply a continuation of earlier stages, but a distinct phase of language provision shaped by cohort size, institutional capacity and the specialised nature of advanced study.

Chart 13. Comparative table of languages offered by HE institutions at advanced (B2) and proficiency (above B2) levels.



The aggregated chart shows a clear stepped pattern in the availability of provision across levels, with a progressive but non-linear decline from elementary to advanced stages. If we place the Elementary provision 100%, the B1 level follows with a substantial drop to around 58%, then a further decline to approximately 40% at B2, and finally a smaller reduction to about 25% at levels above B2. This creates a pattern of sharp initial contraction followed by more gradual narrowing, rather than a steady or uniform decrease.

Chart 14. Comparative table of levels.



The most significant drop occurs between elementary and B1, where provision decreases by over 40 percentage points. This confirms that the largest narrowing takes place at the first stage of progression/intake, highlighting the transition from entry to intermediate as the main structural threshold in the system. The second drop, from B1 to B2, is still substantial but less steep, suggesting that while progression/intake continues to narrow, it does so at a slower rate. By contrast, the reduction from B2 to advanced levels is comparatively smaller, indicating a partial flattening of provision at higher levels. This aligns with the patterns observed in individual languages, where some show a plateau effect once B2 is reached.

Taken together, this produces a three-stage dynamic: broad access at the entry level, strong filtering at early progression and then selective stabilisation at higher levels. The initial steep decline likely reflects the combination of open access at beginner level and the challenges of sustaining learner commitment beyond the first stage. The continued but slower reduction between B1 and B2 suggests the cumulative effect of time, effort and competing academic priorities. The more limited drop beyond B2 indicates that, once learners reach upper intermediate level, they form smaller but more stable cohorts that can be sustained in some languages and institutions.

It is also possible to interpret this pattern in relation to the structure of higher education and programme intensity. Reaching B2 typically requires a significant amount of guided learning time, which may not align with the duration or intensity of study in IWLP contexts. As a result, fewer learners progress to that level, shaping the observed reduction in provision. Beyond B2, the relative stabilisation may reflect a shift from broad participation to more specialised provision, where courses are maintained for smaller groups of highly motivated learners.

Overall, the chart indicates that the system is not characterised by a continuous decline, but by distinct phases of contraction and consolidation, with the most critical reduction occurring at the transition from elementary to B1 and a more stable pattern emerging at advanced levels.

3.10. The continued presence of online provision

This is the third full survey since the end of the coronavirus pandemic, and we continued to seek to evaluate the extent to which IWLPs have maintained an online provision.

3.10.1. The decline in online provision reflects both fewer providers and fewer online offerings

The reduction in online provision is not simply a consequence of fewer institutions responding to the survey. Across almost all languages, the proportion of providers maintaining an online option has also fallen significantly.

For example:

Table 4. Trends in online provision

Language	Number of online providers 22-23	Number of online providers 23-24	Change
Spanish	13	6	-54%
French	12	6	-50%
German	11	6	-45%
Italian	9	4	-56%
Mandarin	8	3	-63%
Japanese	8	2	-75%
Russian	7	1	-86%
Portuguese	7	3	-57%
Arabic	7	4	-43%

The steepest contractions occurred in Russian, Japanese and Portuguese, suggesting that online delivery may have been abandoned most readily in languages with relatively smaller enrolments or where teaching staff may be less readily available.

3.10.2. Online provision appears to be consolidating around high-demand languages

The languages that remain available online are overwhelmingly those with the largest institutional presence. German, Spanish and French continue to dominate online provision, each being offered online by six institutions. Arabic also retains a modest online presence.

This suggests that online delivery is increasingly being treated as a strategic supplement for high-demand languages rather than as a mechanism for expanding linguistic diversity. During and immediately after the pandemic, online provision appeared to broaden the range of languages available nationally; by 2023-24, it appears to be reinforcing existing patterns of demand.

3.10.3. The contraction disproportionately affects less widely taught languages

The disappearance of nineteen languages from online provision is particularly striking. Languages such as Bengali, Cantonese, Czech, Danish, Finnish, Hindi, Korean, Norwegian, Persian, Polish and Romanian were available online in at least one institution in 2022-23 but no longer appear in the 2023-24 data.

This suggests that online delivery may not be perceived as a sustainable means of supporting languages with less demand despite their potential strategic importance across the sector. Instead, institutions appear to have prioritised maintaining face-to-face provision where demand exists locally, rather than using online modes to aggregate demand nationally.
This is significant because online delivery had often been presented as a potential solution to the challenges of sustaining smaller cohorts for a wider range of languages. The data provide little evidence that this potential has been realised.

3.10.4. The increase in online ESOL/EAL provision is an important exception

ESOL/EAL provision is the sole category showing substantial growth, rising from 14% of providers to 57%.

Several interpretations are possible:

- These courses may target broader community or professional audiences rather than primarily enrolled university students.
- Online delivery may be particularly attractive for learners balancing employment, caring responsibilities or geographical distance.
- Institutions may view online ESOL as a potential source of external engagement or income generation.

Unlike foreign language provision, where online delivery appears to be retracting, ESOL provision may benefit from a larger and more geographically dispersed potential market.

3.10.5. Evidence of a post-pandemic stabilisation rather than continued innovation

The data suggest that the sector may now have reached a post-pandemic equilibrium. Rather than continuing to expand digital provision, institutions appear to have reassessed the pedagogic, operational and financial costs of online language teaching and largely reverted to campus-based delivery.

The proportion of providers offering online versions of major languages has settled at around one-fifth or less:

- German: 19%
- Spanish: 19%
- French: 18%

- Arabic: 15%
- Italian: 14%
- Mandarin: 10%

These figures imply that online delivery is now a minority model within IWLP provision rather than a mainstream mode of delivery.

3.10.6. Implications for access and widening participation

One consequence of the decline may be reduced access for learners who cannot easily attend campus-based classes, including:

- staff based away from campus;
- part-time learners;
- mature students;
- learners in rural locations;
- members of the public participating through community engagement programmes.

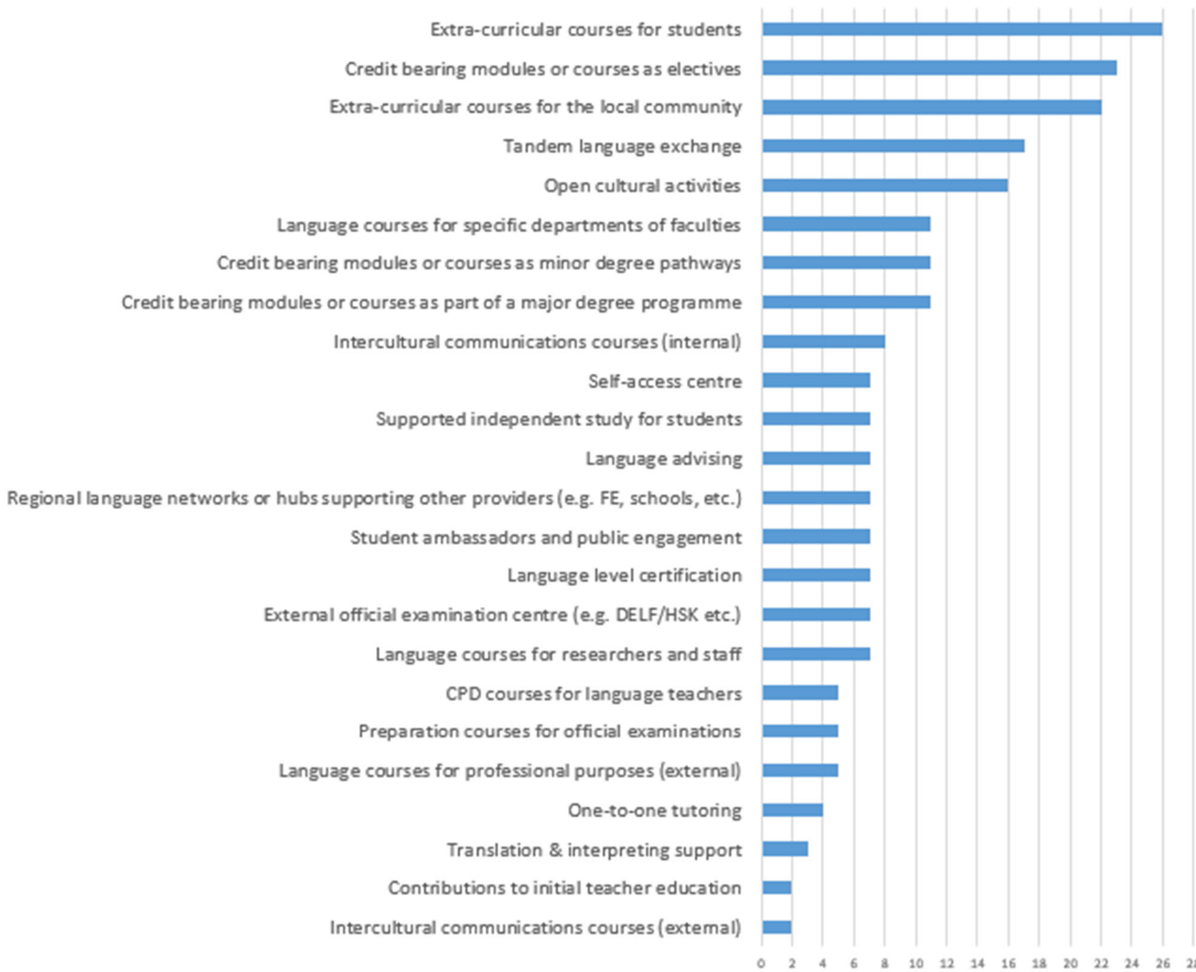
While face-to-face teaching may offer pedagogical advantages, the reduction in online provision potentially narrows participation opportunities, reduces flexibility for some learner groups and reduces the opportunities for students and learners to access a wide range of language courses that are not available in their institutions or in geographical proximity.

The data indicate that the expansion of online language provision observed during and immediately after the pandemic may not have been sustained. Online delivery seems to have contracted substantially across almost all languages, with provision increasingly concentrated in the most widely taught languages. The findings mostly suggest that the sector has moved towards a post-pandemic settlement in which online language learning remains available, but as a specialist rather than mainstream mode of provision. This analysis needs to be carefully viewed considering the smaller number of responding institutions.

3.11. Types of activities undertaken within an IWLP

The range of activities undertaken under the umbrella of an IWLP, both actual and potential, is quite broad. For the third time this survey has sought to identify and acknowledge the extent of an IWLP beyond the delivery of language courses.

Chart 15. Type of activities undertaken within IWLPs



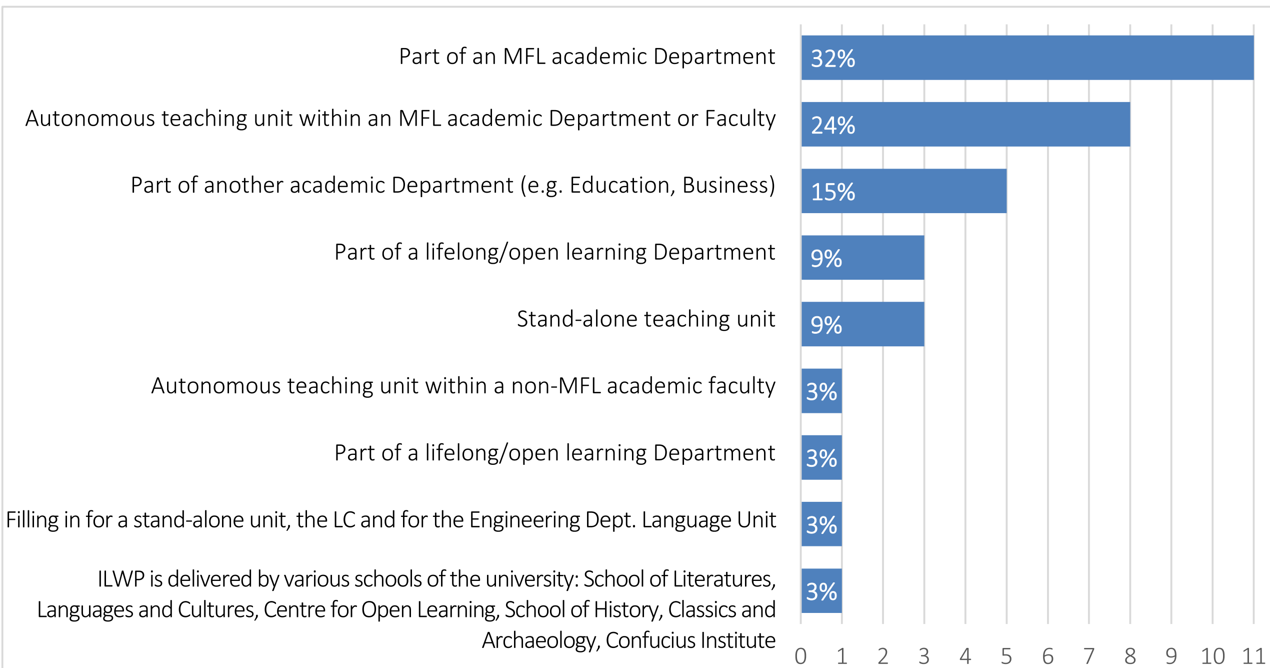
Clearly, the scope to offer a wider range of services is influenced by many factors, not least the size of the unit, but also the level of institutional support, institutional strategies, and the relationship with other departments. In addition, there are specific choices made in each organisation, with some IWLPs only offering credit-bearing elective courses, whilst others only offer extra-curricular courses not for credit. Nevertheless, the number of institutions reporting wider activities beyond the delivery of language courses is encouraging.

Of 24 categories of activity identified by the survey, one-third are inevitably related to the delivery of courses in different forms and to different audiences within the institution. However, there are also indications of widespread outreach, including delivery of courses to the local community or for income-generating purposes, CPD, language certification, translation services and general language advice. Effectively, this represents a centre of excellence for the delivery of language learning on a wider scale than might otherwise be imagined. The purpose of this question in the survey was to identify such practices and thereby offer inspiration to other IWLPs across the country in terms of the value that can be offered to our internal and external communities of learners, and across our institutions.

3.12. Organisational structures

A comparative analysis of previous and the current survey indicates that the structural organisation of IWLPs across reporting institutions over the past twelve years presents a high degree of fluidity. The data indicate that IWLPs have not remained fixed but have adapted in response to institutional priorities and external pressures. This is reflected in shifts in governance models as well as in the repositioning of programmes within different parts of the university. At the same time, IWLPs continue to remain closely linked to Modern Languages departments which provide an academic anchor despite ongoing structural changes.

Chart 16. IWLP organisational structures



3.13. Teacher recruitment

Anecdotally, some increasing concerns have been raised regarding challenges with teacher recruitment in certain languages, including widely taught languages such as French or German. In addition, as some languages become more popular, there will inevitably be shortages of suitably qualified language teachers in these languages. The survey asked institutions to comment on this challenge.

33 responders (of 46, an increase of 4 compared to the 2021-22 survey) confirmed problems in recruiting language teaching staff. The most challenging languages are reported to be:

German	9 mentions
BSL (British Sign Language)	8 mentions
Japanese	6 mentions
French	4 mentions
Korean	4 mentions
Arabic	3 mentions
Spanish	3 mentions
Chinese (Mandarin)	3 mentions
Polish	2 mentions
Russian	2 mentions
Welsh	2 mentions
Italian	2 mentions
Punjabi	2 mentions

The most widely cited reasons for recruitment problems are:

- A limited domestic pool of teachers requiring recruitment from outside the UK but with insufficient hours to support a visa application.
- A too small pool of available teachers in less widely taught languages (Korean especially, but also BSL, Dutch, Swedish).
- A reduction in the numbers and quality of applications in more common languages (French, German, Spanish).

The availability of teachers to deliver language courses, of course, remains essential for the success of IWLPs in the future. AULC will need to monitor the situation more generally and may need to become more involved in training programmes to expand capacity in critical languages for the future or to increase collaboration.

The survey specifically looked to test possible areas for collaboration. Among the 48 responses obtained, over half (25) of the respondents indicated that they would consider referring students whose language or language level they cannot offer to other institutions.28 indicated that they would like to be contacted by AULC regarding such possible collaboration.

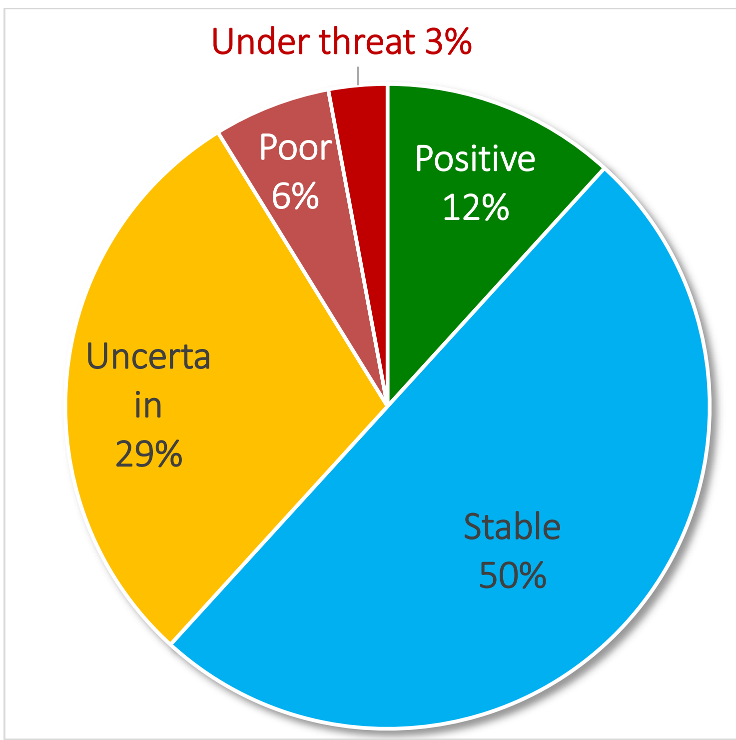
3.14. Outlook for IWLP

The data for 2023-24 indicates that perceptions were cautious, but not uniformly stable. Half of the responses, when asked "What is the outlook for your IWLP?", fall into the Stable category. This suggests continuity rather than improvement or decline, which could point to a system that is largely maintained.

A further 29% are classified as Uncertain. This does not signal neutrality but rather doubt about conditions and limited confidence in the direction of travel. It implies a context in which future pathways are unclear and where respondents may anticipate challenge rather than a sense of security.

Positive perceptions remain limited at 12%, which indicates that relatively few respondents recognised clear progress or strong outcomes. Negative views are smaller in scale, with 6% rated as Poor and 3% as Under threat. Although these figures seem modest, they remain significant as they show that a minority already perceived deterioration or risk within the system.

Chart 17. Institution perceived outlook for their IWLP



Overall, the pattern suggests a context where apparent stability coexists with a substantial sense of uncertainty. This combination points to a system that is functioning but not fully secure or predictable. These findings relate to 2023-24. Since then, perceptions have shifted due to the reduction and closure of several language provisions across the country, which are likely to have increased pressure and uncertainty further.

3.14.1. Positive developments contributing to an improved outlook

Consequently, following the question on the outlook for IWLP, respondents were asked to give details on positive developments contributing to an improved outlook.

The responses show a limited but consistent set of enabling factors. Institutional support is the most prominent theme, with several respondents referring to backing from Deans, Schools or the wider university mission. This support is generally framed at a strategic level and linked to sustainability and recognition of languages.

A second theme is organisational change presented as an opportunity. Integration into larger units, new structures and the reintroduction of credit-bearing provision are seen as ways to improve coordination and extend reach. Collaboration, both within and across institutions, also features, particularly through shared provision and online delivery.

A third theme concerns demand and engagement. Some respondents report strong student demand and high satisfaction, alongside potential growth in areas such as English communication and new formats. Digital provision and marketing are viewed as supporting expansion and visibility.

However, these positive developments are uneven and often tentative. Some responses indicate no clear improvements, and many of the examples cited relate to planned or early-stage initiatives rather than established outcomes. This suggests that positive momentum remains limited.

When related to the chart, these findings align with the small proportion of positive responses. While drivers of improvement exist, they do not yet shape the overall outlook. Some developments described as positive, such as restructuring, also appear elsewhere as sources of uncertainty, highlighting their mixed impact.

On the whole, the responses indicate cautious and selective optimism, consistent with the broader pattern of limited positive sentiment.

The participants' original responses are included to ensure transparency and to allow readers to form their own interpretations and identify aspects that may not have been fully captured in this analysis.

> "Demand from students and high levels of satisfaction."
> "I think in general support from our School and College seems to be good and reliable."
> "Marketing"
> "N/A"
> "No"

"Our College has initiated a dialogue between all schools that deliver languages, including linguistics and language education."

"Plans to offer some LEAP language courses online."

"Support in principle from our current/new Dean, stronger networks developing with the University's learning & teaching community, the University abandoning move to all 20-credit modules, consistently bringing 45% of our income as profit to our school (faculty)."

"The Integration of the Language Centre into the department for continuing education will, in time, facilitate the capacity to develop new courses, a more strategic deployment of shared resources, and provide new opportunities to reach further audiences. We are working collaboratively with other HEIs to offer their students places on our online courses at the student fee."

"The university is restructuring its UG and PG framework next year and will reintroduce credit-bearing IWLP after a 20-year gap."

"We have institutional support as part of Swansea University's mission to be a broad institution in terms of academic subjects on offer."

"We hope to grow English Communication and Polylang X to make up for the reduction in some languages. "

"Yes, the university's support to adopt a more sustainable model to be launched in 2026-27."

3.14.2. 3.12 Factors leading to a poor outlook

Consequently, following the question on the outlook for IWLP, respondents were asked to give details of the factors leading to a poor outlook. While this prompt was directed at those selecting poor or under threat, responses were also provided by all those who selected uncertain and by a substantial proportion of those who selected stable. This wider engagement suggests that concerns extend beyond explicitly negative categories and are also present among those who might otherwise appear more confident.

Across the responses, several consistent themes emerge. Financial pressure is a dominant concern, often linked to declining student numbers, reduced international recruitment and wider institutional deficits. These pressures appear to translate directly into staffing constraints, including reduced posts, greater reliance on fixed-term or fractional contracts and increased workloads. Alongside this, organisational change is frequently mentioned, particularly restructuring, integration into larger units and shifts in leadership. Such developments are often associated with reduced autonomy, unclear lines of responsibility and a perceived weakening of strategic direction.

Access to language provision also emerges as a key issue. Respondents highlight restrictions on elective modules, timetabling conflicts and complex enrolment processes, all of which limit participation. These internal constraints are compounded by external factors, including the cost-of-living crisis and growing competition from both higher-ranked institutions and alternative learning routes, such as free digital platforms and AI-supported tools. Together, these trends suggest both structural and behavioural shifts that may undermine demand.

The tone of the responses is consistently cautious and, at times, strained. Even where supportive leadership or potential developments are noted, these are typically framed with hesitation. This indicates limited confidence in sustained improvement and a tendency to view positive signals as uncertain or fragile.

We also note, and indicated before, a discrepancy between the distribution of responses in the chart and the substance of the comments. While stable accounts for half of all responses, many of the associated comments describe pressure, constraint or emerging risks. This suggests that stability is often understood as provisional or maintained under strain, rather than as a continuum of security. Similarly, the prominence of uncertain responses is reflected in detailed accounts of constrained choice, financial vulnerability and organisational fluidity, reinforcing the interpretation of uncertainty as a condition of limited direction and reduced confidence. Generally, the responses point to a system operating under sustained pressure, where apparent stability coexists with structural challenges and a pervasive sense of uncertainty.

Participants' original responses are included below to provide a broader perspective and to complement this analysis, ensuring that nuances or points not fully captured here remain visible.

> "Being moved/under the umbrella of a different School."
> "Change of model, low morale, preparation of some colleagues to face the challenges ahead, pressure from college and university."
> "Current programme review of financial sustainability"
> "Decline in international students. Hourly paid staff, understaffed."
> "Decreasing student numbers and increasing competition from higher-ranked institutions."
> "If we fail to wrest back control of ELP."
> "In 2024-25, an institutional programme review prevents most Year 1 students from taking language electives. Programmes have also restricted access to the following years. As a consequence, the institution is under financial pressure; the department and school under which the IWLP is located are both under severe financial pressure. Staff resources move from the IWLP to the Department of Modern Languages; permanent posts lost to VR are not replaced; instead, fixed-term, smaller fractional contracts are seen as the safer option "
> "Increased staff costs from better contractual terms, the increase in National Insurance contributions."
> "It is too soon to say if the outlook is poor. It is certainly more troubled than it has been after a long period of relative stability."
> "Lack of institutional support at all levels, including our home department."
> "Loss of a pro languages head of department."
> "Staffing resources being cut - no additional groups, hence more students to drop out due to timetable clashes, for instance. "

“Students can take uni-wide credit courses only in Years 1 and 2. Finding these courses in the course catalogue and registering are not easy.”

“The cost-of-living crisis has significantly impacted students' ability to afford language courses. With rising costs, students have less disposable income for additional educational expenses. This financial strain forces many to prioritise their spending, often leading them to choose free or cheaper alternatives over paid language courses. The availability of free online language learning platforms like Duolingo offers students cost-effective ways to learn new languages. These platforms provide interactive and engaging content that can be accessed anytime, making them an attractive option for students who may not have the financial means to enrol in university courses. Interestingly, most students who register for university courses nowadays have already used tools like Duolingo to build a foundation in the language. Advancements in AI technology, particularly in natural language processing and translation, have made it easier for people to access information in foreign languages without needing to learn the language themselves. AI-powered tools like translation apps and language models can provide instant translations and even help with language comprehension. This convenience may lead some students to believe that they do not need formal language education, as they can rely on AI to bridge the language gap.”

“The integration into the degree courses poses many questions. There was also no direct replacement for the director's role, and instead, the work was mainly shared between two senior colleagues.”

“The recent restructuring of the MFL department had a significant impact on the outlook of IWP.

“We are always in a vulnerable position due to factors beyond our control (e.g. access to options changing). Logistics make languages feel complicated to include. All staff being part-time and high workload for the manager, meaning less time for rapid strategic developments.”

University finances are in the red. They're saving every penny they can save.”

“We have a very supportive Dean and are actually thinking about reinstating a language with a degree. However, I have been around long enough not to be excited about this - falling student numbers and the volatile climate made me tick uncertain - maybe between uncertain and stable!”

“Wider financial pressures, reduction in international student recruitment, budget pressure.”

4. AULC support for institutions

The responses to the question “What support would you value from the AULC that it does not already provide?” suggest that AULC is widely perceived as offering strong and valued support. A notable proportion of respondents indicate that no additional provision is required or express satisfaction with what is currently available, reflecting a baseline of confidence in AULC’s activities. We feel privileged to support language provision in Higher Education and are grateful for the recognition expressed by colleagues. At the same time, given the current challenges facing the sector, these responses also highlight the need to continue developing and expanding this support.

Where additional needs are identified, they cluster around a small number of themes. One key area is professional development and leadership capacity. Respondents point to the value of leadership and management training, as well as broader CPD opportunities. This indicates a demand for structured support in navigating increasingly complex institutional contexts.

A second theme concerns evidence and advocacy. Several responses highlight the need for robust data on the impact of language learning, particularly in relation to employability and economic value. This reflects a wider need to strengthen the case for language provision within institutions facing financial pressure and restructuring.

A third theme relates to sustainable models and sector intelligence. Respondents express interest in the sharing of financial models, class structures and innovative approaches linked to employability. This suggests that institutions are actively seeking practical solutions to ensure long-term viability and see AULC as well placed to facilitate this exchange.

A further area is resources, collaboration and visibility. Suggestions include shared platforms for scholarship, open-access teaching materials, online training, and recorded content. These requests point to a desire for more accessible and collective infrastructures that support both teaching and research, as well as wider participation across institutions.

Some more specific needs are also identified, such as support in developing alternatives to existing certification frameworks or sharing success stories of IWLPs. These indicate targeted gaps where coordinated sector input could be beneficial.

By and large, the responses suggest that while AULC’s current offer is highly valued, there is a clear interest in expanding its role as a facilitator of leadership development, evidence-based advocacy and shared models of practice. This aligns with the broader pressures identified elsewhere, particularly around sustainability, legitimacy and strategic positioning.

5. Conclusion

While the overall picture of IWLP student enrolment continues to be broadly positive across the Higher Education sector, there remains an underlying uncertainty and defensiveness. The data collected this year showed a humble increase in the number of responding institutions, with some unable to provide some of the data and some institutions providing more than one answer. AULC has previously reported that 7 HEIs closed IWLP provision in the period 2017-2019. Since the start of the coronavirus pandemic in 2020, a further 5 IWLPs have closed, with a further 8 known to be under threat of either closure or significant reductions in activity. It is therefore ever more important to gather and share reliable data that can be used to demonstrate the value of institution-wide language learning, at a time when more students are requesting access to language courses during their UG and PG degrees as they understand the importance of linguistic and cultural competences for their personal and professional development. The internal dynamics in each of our member institutions are very different, and the observations we can draw from information on language registrations and from wider activities are inevitably ambiguous. At this time, it is therefore ever more important to share success stories and present our community with information to support ourselves individually and collectively in order to ensure the maintenance of a broad-based programme of institution-wide language support across the UK.

This survey was carried out on behalf of the Association of University Language Communities by: Martín Agnone, Oranna Speicher and Marion Sadoux.

6. Appendix: List of participating institutions

Aberystwyth University
Anglia Ruskin University
Brunel University London
Cardiff University
Durham University
Edge Hill University
Keele University
King's College London
London School of Economics and Political Science
Loughborough University
Manchester Metropolitan University
Newcastle University
Nottingham Trent University
Queen Mary University of London
Swansea University
University College London
University of Bath
University of Birmingham
University of Bristol
University of Cambridge
University of Central Lancashire
University of Chester
University of Edinburgh
University of Essex
University of Glasgow
University of Leicester
University of Manchester
University of Oxford
University of Reading
University of Sheffield
University of Sussex
University of Westminster
University of York

8. Tables and Charts index