ASSOCIATION OF COLLEGES

Enrolment survey report

October 2025

Contents

List of figures

Introduction

This briefing describes findings from the Association of Colleges' (AoC) enrolment survey for the 2025/26 academic year. AoC has collected data from colleges in this way for more than twenty years to provide an indication of enrolments in advance of the comprehensive national census collected by the Department for Education in the Individual Learner Record (ILR).

1. Methodology

In September 2025 (return date 3 October 2025), AoC surveyed college leaders at all member colleges to gather early information about enrolments.

The survey covered several areas to inform college planning and stakeholder engagement, including: 16 to 18 education, 16 to 18 GCSE and functional skills English and maths, T Levels, adult enrolments including ESOL, apprenticeships, higher education, international, and skills gaps. Respondents were asked to only complete the sections relevant to their college. For this year's survey, questions referring to sector subject areas (SSAs) and the Industrial Strategy's eight priority sectors, plus health and construction, were included.

A total of 105 providers responded, of which 101 were colleges – representing 47% of the sector in England. The vast majority (85%) were general further education colleges, while 7% were sixth form and 8% specialist colleges.[1] This is broadly in line with responses to our 2024 survey. Please note that response levels to each question vary according to the provision offered at each respondent college.

One limitation to note is the sample size; while not fully representative of the sector, a good overview of enrolments is provided. Despite the addition of SSAs, results might reflect a local need, as demand for subjects can vary between areas. The number of survey questions was significantly reduced this year to develop a more focussed output while reducing respondent workload; this approach will be reviewed ahead of the next enrolment survey in 2026.

[1] AoC's membership also includes academies and specialist SEND colleges

2. Findings

2.1 16 to 18

Overall, most colleges (89%) saw an increase of between 0.1%-19.9%[2] in enrolments for 2025/26 compared to the previous academic year (see Figure 1). Only 9% of enrolments were on target and 2% saw a decline of up to 19.9%. This reflects a slight increase from last year, when 86% of colleges reported growth (of up to 20%), 5% were on target, and 6% experienced a decrease. We asked a follow-up question of colleges on 6 October 2025 to gauge the precise numbers of 16 to 18-year-olds they expected to have enrolled and attending as of 1 November 2025. In total, 49 colleges reported data which showed that they expected to have 11,042 students more than their funding target, representing 5% growth compared to last year. We do not have sufficient evidence to make a confident prediction about overall growth for the whole sector because we are not certain how representative the college responses were, but the numbers suggest total growth may be close to the 25,000 forecast in our 16-18 report published in April 2025.

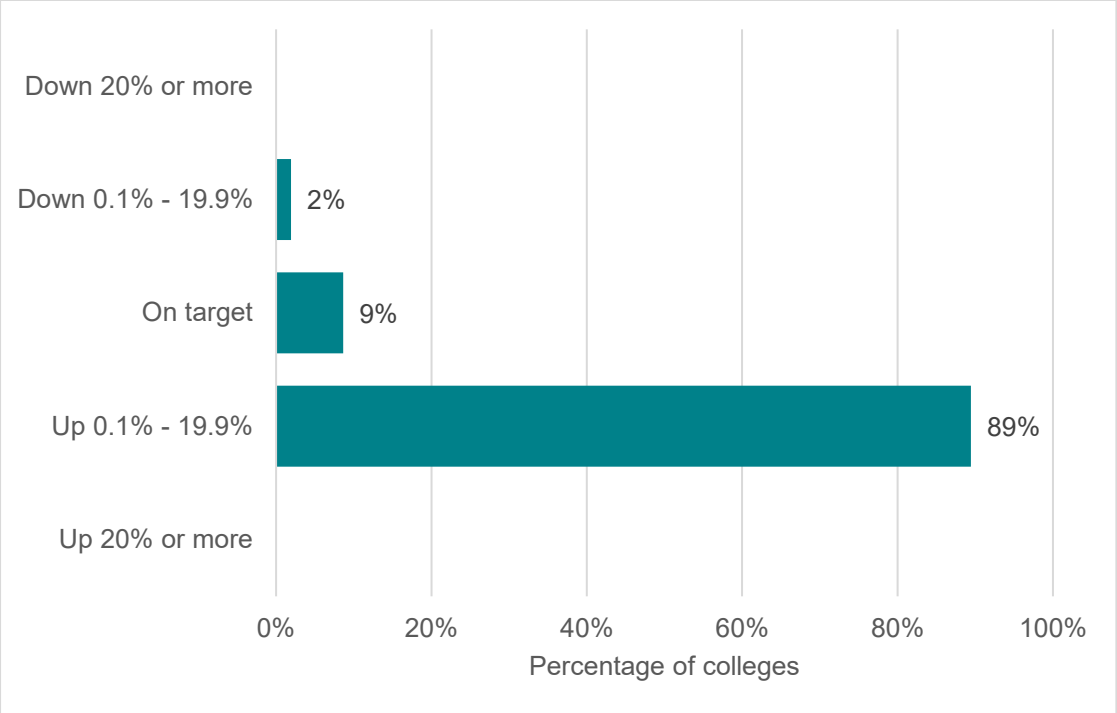

Figure 1: How 2025/26 16 to 18 enrolments compare with those in 2024/25, response rate 104.

Significant increases in enrolments were most commonly reported in construction (77% of colleges), electrical (64%), engineering (50%) and health and social care (48%), while significant decreases were reported in modern foreign languages (MFL) 18% of colleges), performing arts (14%), and sport (12%) – see Figure 2. One possible explanation for the decline in MFL is an increased uptake within school sixth forms. At

[2] It's been acknowledged that the 0.1%-19.9% increase/decrease range is broad, and that using a more precise measure would be helpful for future reporting.

least three quarters of colleges reported stable enrolments in sociology (78%), agriculture (76%), MFL (76%) and environmental science (75%).

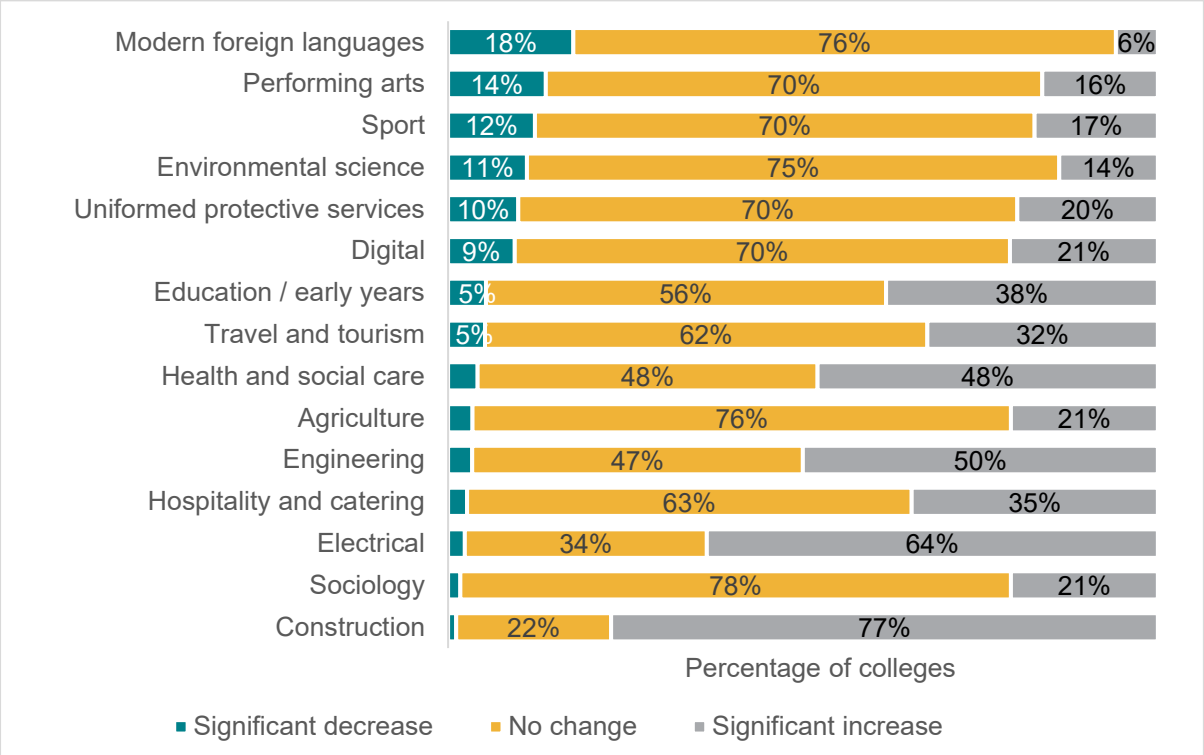

Figure 2: Significant changes in 2025/26 16 to 18 enrolments by subject area, compared with 2024/25, response rate 103.

Reported by over two-thirds (68%) of colleges, demographic change was the most frequently cited driver of increased enrolments (see Figure 3). Over half (51%) highlighted the impact of the summer 2025 GCSE results, consistent with ongoing challenges in English and maths. Other contributing factors included local labour market conditions (28%) and the availability of work-based training opportunities e.g. apprenticeships and traineeships (15%).

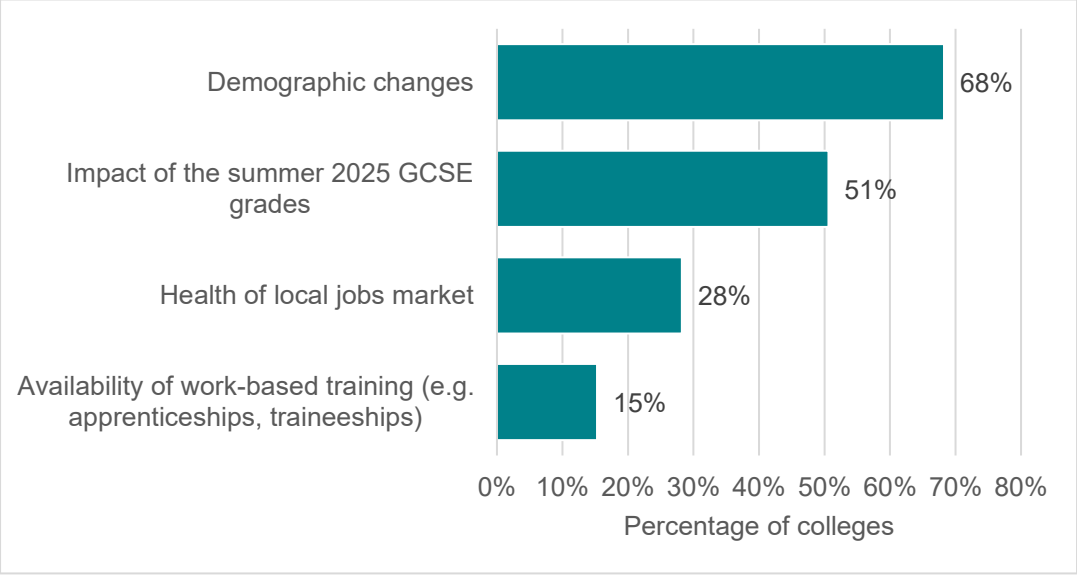

Figure 3: Main drivers behind any significant increases in 16 to 18 enrolments in 2025/26, response rate 85

Over two-thirds (68%) of colleges reported competition from other providers as a driver behind significant decreases (see Figure 4). The cost-of-living crisis was also a factor, with 29% of colleges reporting that young people were choosing employment instead of study or training. Other drivers included limited work-based training (19%), demographic changes (19%), and health of the local jobs market (16%).

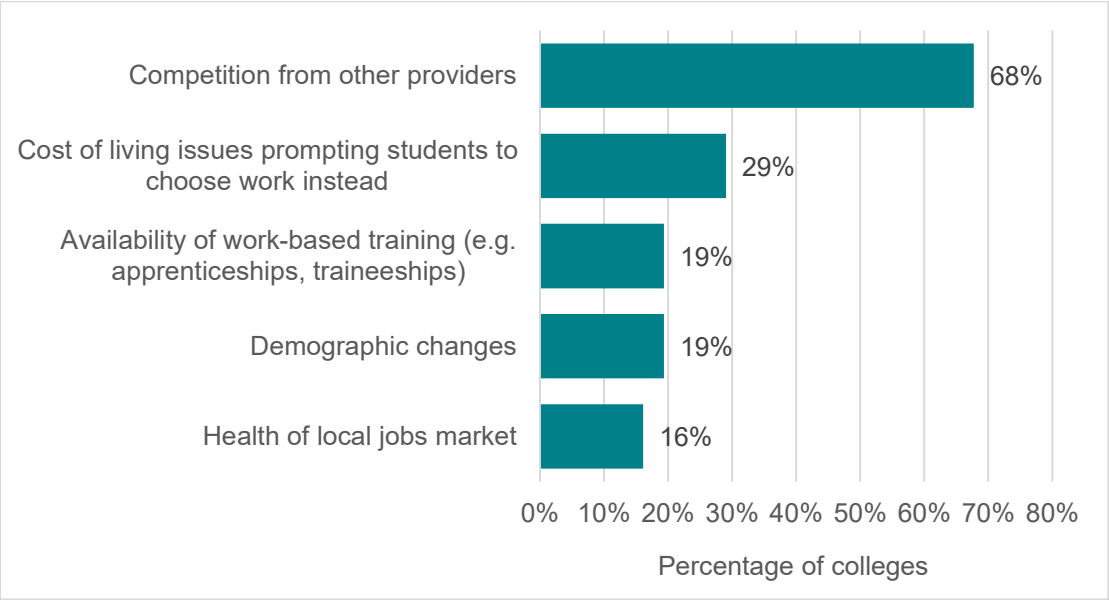

Figure 4: Main drivers behind any significant decreases in 16 to 18 enrolments in 2025/26, response rate 31.

Subject areas with increases in enrolments were closely aligned with staffing and spacing challenges, including construction (reported by 60% of colleges), electrical (56%), engineering (37%) and health and social care (28%) – see Figure 5. Most subjects had at least some capacity issues, with modern foreign languages the only one where no colleges reported an issue.

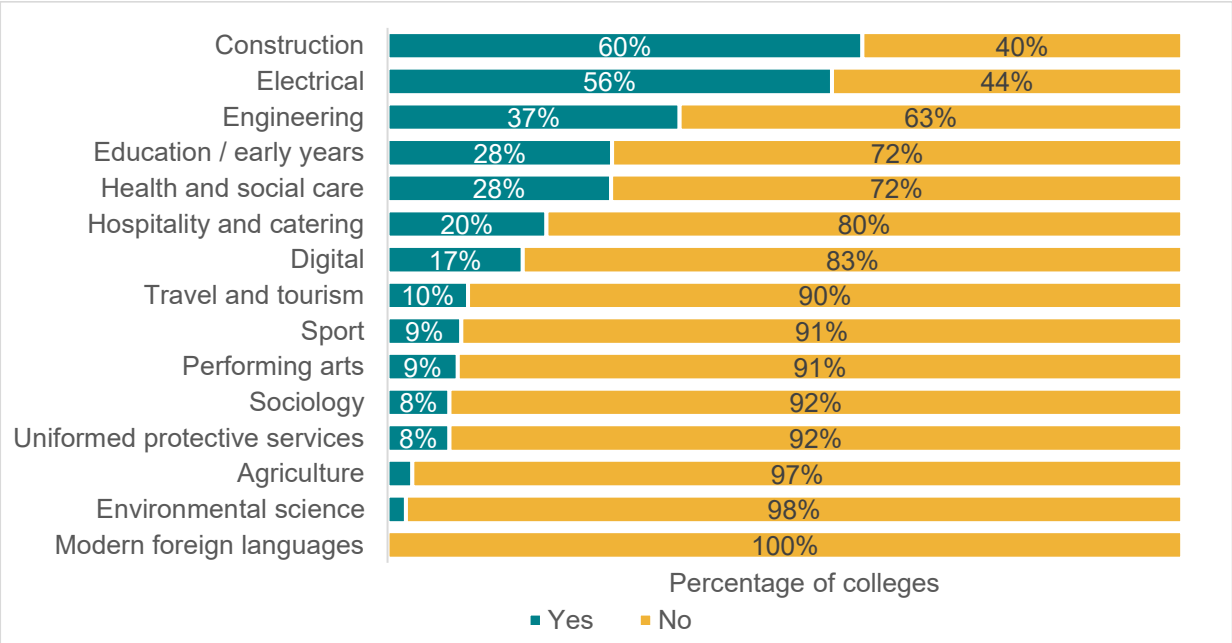

Figure 5: Subject areas where 16 to 18 enrolments are limited or courses closed due to staffing or space constraints, 2025/26, response rate 103.

Overall, enrolments for 16 to 18-year-olds continue to grow steadily, with particularly strong demand in construction and engineering. However, capacity pressures remain a challenge, leading to situations in which colleges are forced to limit enrolment and/or close courses where student interest overwhelms resources.

2.2 16 to 18 English and maths

Almost two-thirds (65%) of colleges saw an increase in 16 to 18 GCSE English enrolments and 61% in GCSE maths (see Figure 6). Fewer colleges reported increases in functional skills English and maths (35% and 37% respectively). This represents a decline compared to last year, when 75% of colleges reported higher-than-expected GCSE English enrolments, 71% in GCSE maths, and 39% and 38% in functional skills in English and maths respectively. However, it should be noted that 2024 saw a significant rise in the number of 16-year-olds (up 4.6%)[3] while in 2025 there was a 0.3% decrease. Colleges were still experiencing the impact of teacher assessed grades (TAGs) and centre assessed grades (CAGs) on their own English and maths GCSE results[4].

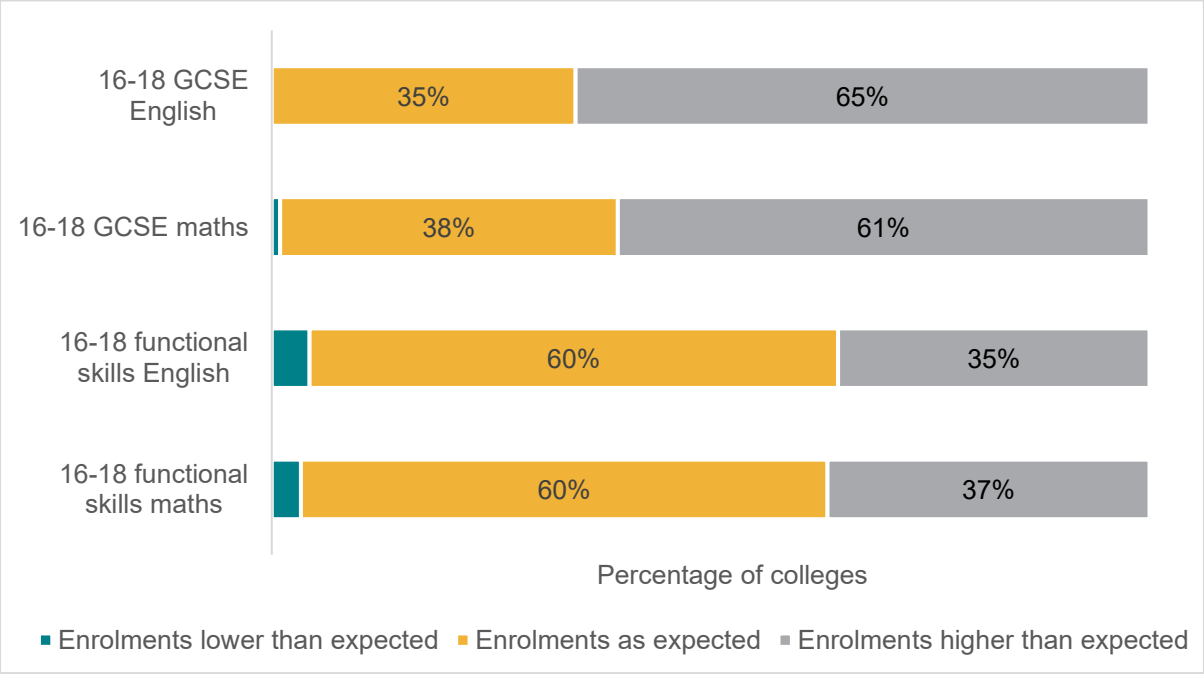

Figure 6: 2025/26 16 to 18 enrolments in English and maths GCSE and functional skills, compared with 2024/25, response rate 105.

2.3 T Levels

Among colleges delivering T Levels in 2025/26, many subject enrolments were lower than expected. Craft and design, introduced last year, has seen a significant decrease where 89% of colleges reported enrolments below expectations. Other subjects with notably lower enrolments included media, broadcasting and production (63%), digital

[3] JCQ data
[4] Level 2 and 3 attainment age 16 to 25, Academic year 2023/24 - Explore education statistics - GOV.UK

data analytics, formerly digital business services (60%), science (55%) and digital support and security, formerly digital support services (50%). A smaller number of subjects showed a more balanced picture, with around half of colleges reporting enrolments on target. These included maintenance, installation and repair for engineering and manufacturing (63%), and building services engineering (52%). While legal services has seen an upturn in enrolments in 30% of colleges, an equal proportion (30%) were on target and 40% reported lower-than-expected numbers.

Overall, the findings indicate that while a few subjects are attracting higher numbers, enrolments across most T Levels remain below expectations, reflecting ongoing challenges in recruitment and awareness during this early phase of delivery.

2.4 Adults

Over half (54%) of colleges said their adult enrolments were on target in 2025/26 compared to the previous year (see Figure 7). A further 27% saw an increase, while 19% reported a decline. This marks a slight improvement in stability from 2024/25, when 47% were on target, 32% saw an increase and 21% saw a decrease.

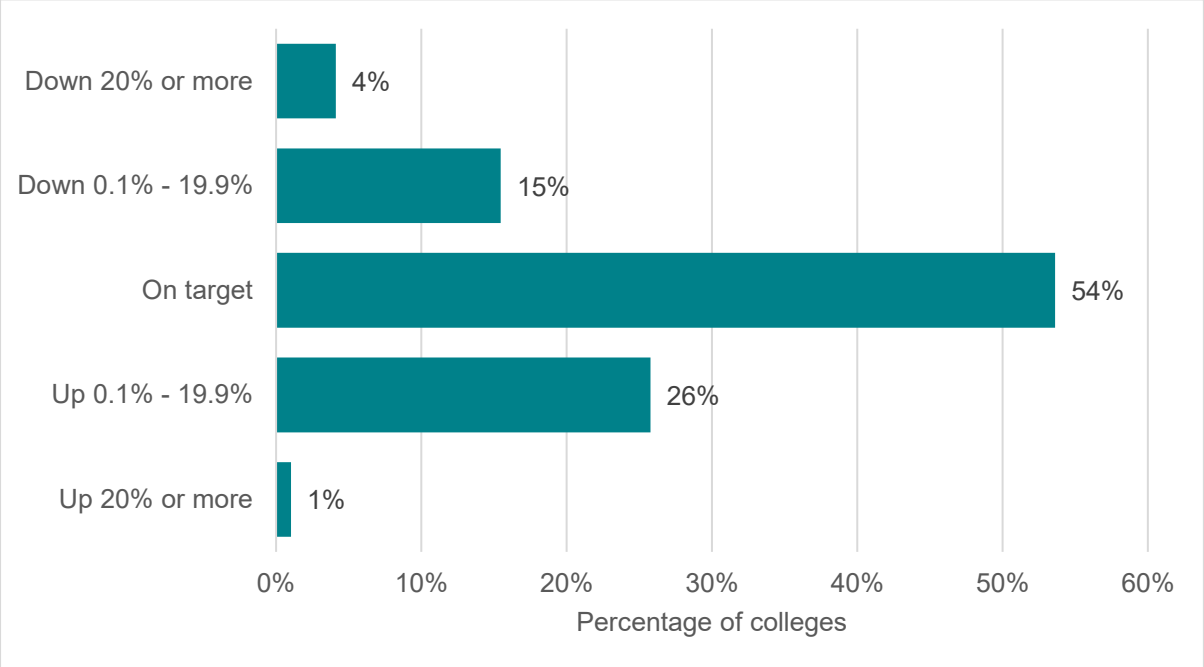

Figure 7: How 2025/26 adult enrolments compare with those in 2024/25, response rate 97.

Around half (48%) of colleges reported English for speakers of other languages (ESOL) enrolments on target in 2025/26 (see Figure 8). One third (33%) were up between 0.1%-19.9%, and 8% reported growth of 20% or more. One in ten (10%) colleges saw a decline, a trend that potentially might reflect impact from regional or mayoral strategic authority (MSA) decisions. These figures are broadly consistent with 2024/25 findings.

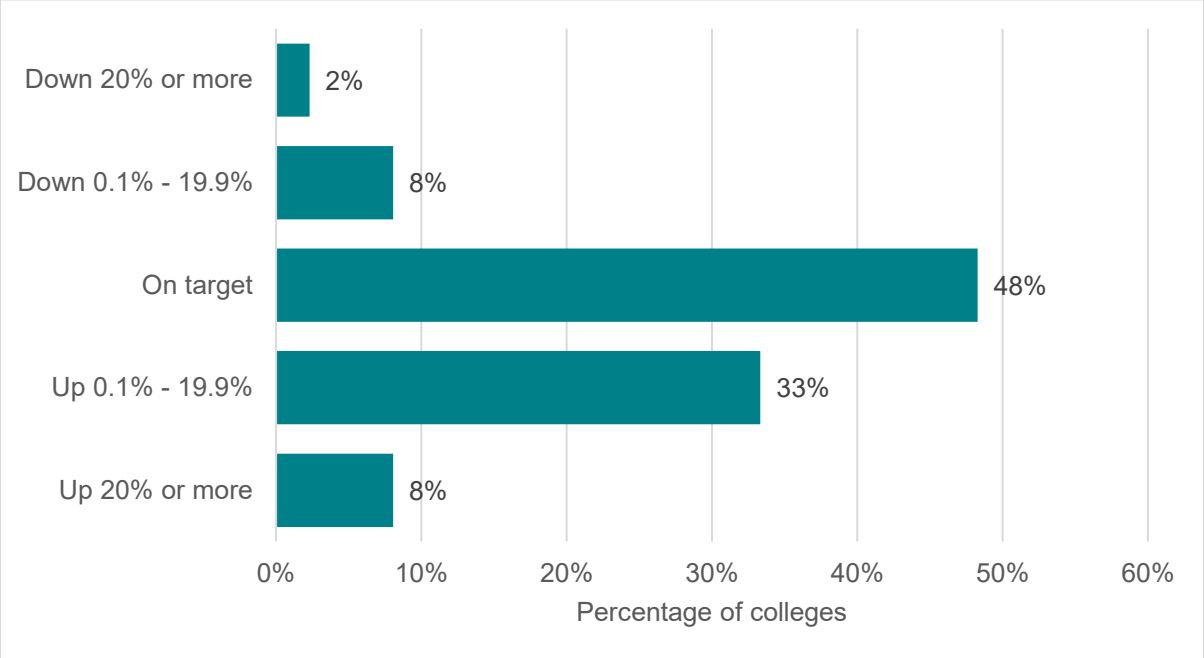

Figure 8: How 2025/26 ESOL enrolments compare with those in 2024/25, response rate 87.

ESOL emerged as the area of adult provision with highest unmet demand (61%), reinforcing wider college feedback received by AoC (see Figure 9). Other areas showing unmet demand included free courses for jobs (41%), basic skills (32%), access to higher education (17%), and Skills Bootcamps (7%).

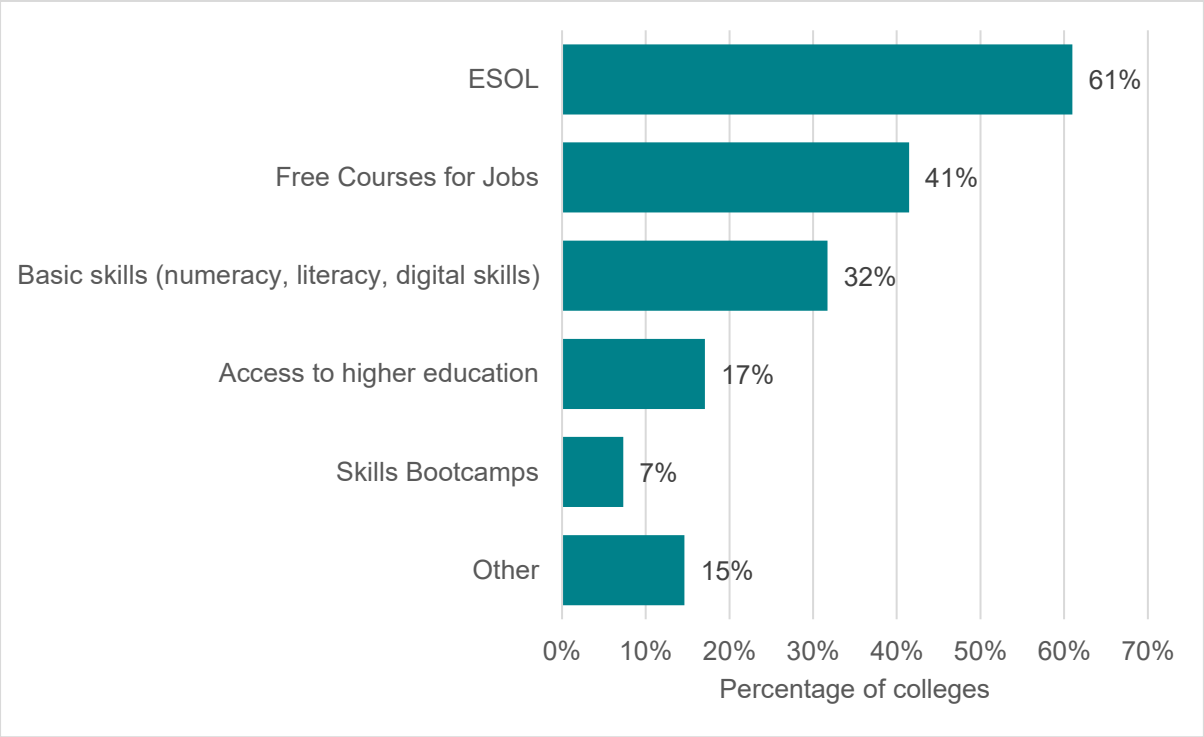

Figure 9: adult provision with unmet demand 2025/26, response rate 41.

While adult education demand remains strong, particularly for ESOL and free courses for jobs, colleges face challenges in meeting this interest. The level of unmet demand for Free Courses For Jobs is particularly noteworthy and will be investigated further by AoC.

2.5 Apprenticeships

Around half (51%) of colleges said that their apprenticeship enrolments for 2025/26 were on target compared with the previous year, over one third (35%) reported an increase and 14% a decrease (see Figure 10). This represents a slight improvement to the 2024/25 survey findings, when fewer colleges were on target (44%) or saw an increase (29%).

When broken down by age group, the largest increases were among 16 to 18-year-olds (38%), followed by those aged 19 to 23-year-olds (30%) and 24+ (24%). Declines were relatively consistent across all age groups, indicating steady participation but stronger growth among younger learners.

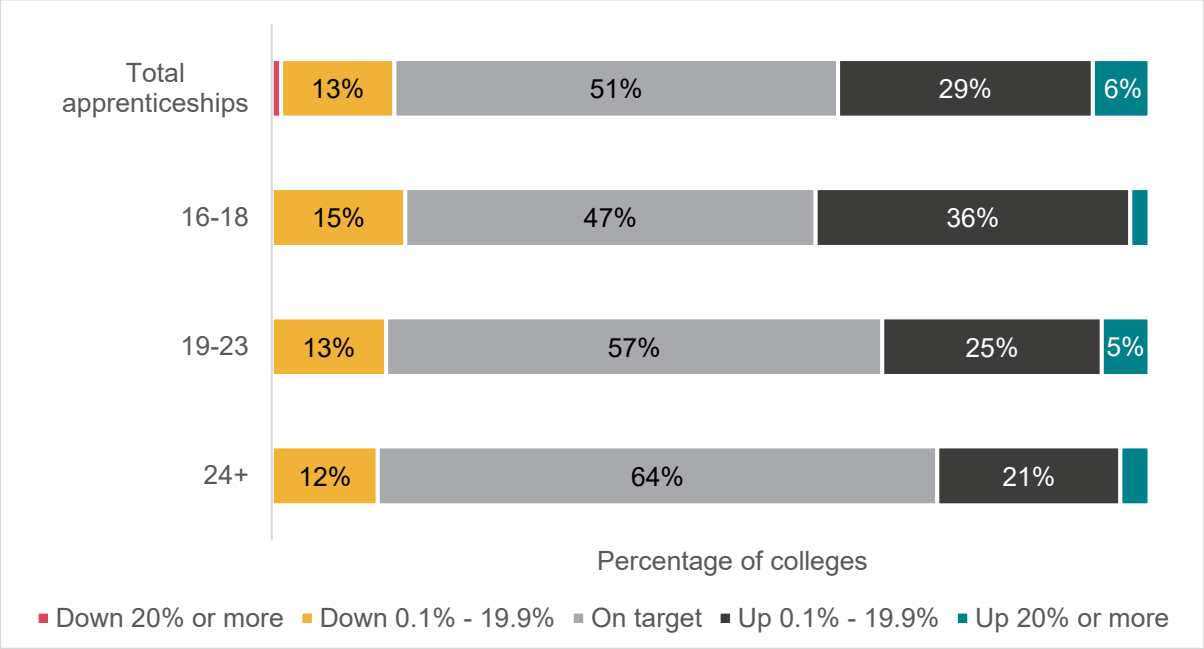

Figure 10: How 2025/26 apprenticeship enrolments compare with those in 2024/25, response rate 105.

Most colleges reported stability across SSAs compared with the previous year, particularly in science and maths (100%), arts, media and publishing (94%), and social sciences (92%) – see Figure 11. The SSAs with the most growth were construction, planning and the built environment (35%), engineering and manufacturing technologies (26%) and health, public services and care (23%). Conversely, business, administration and law (16%) and digital technology (11%) saw the largest decline.

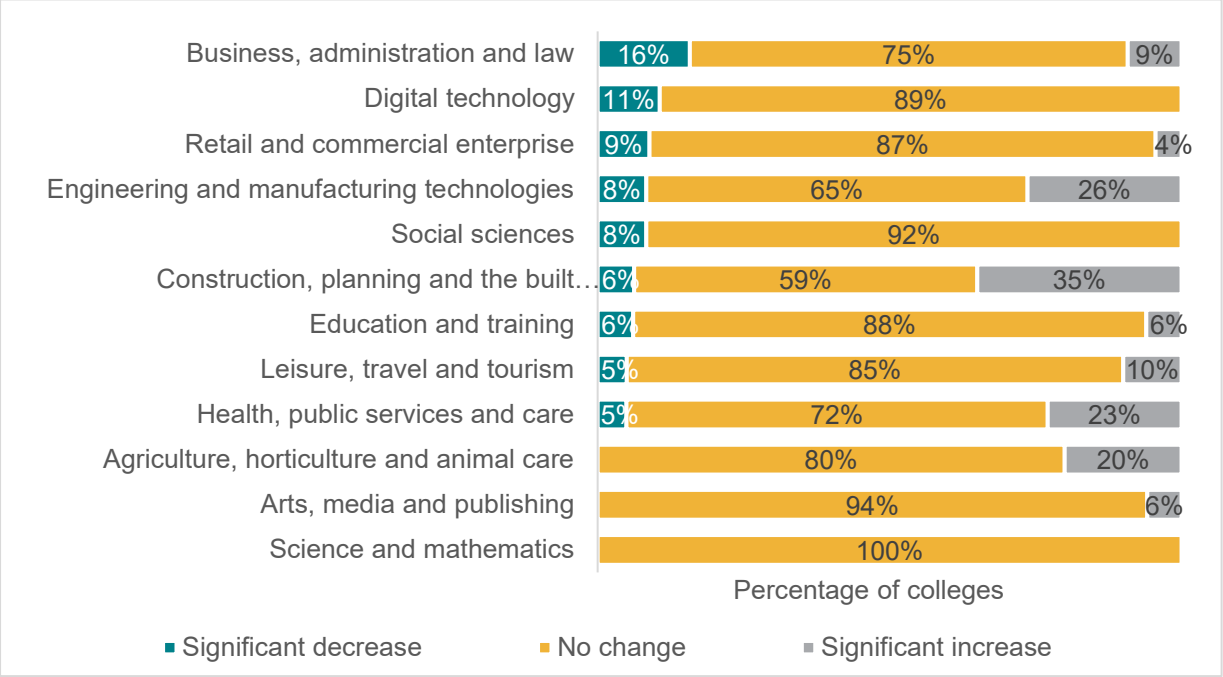

Figure 11: Significant changes in 2025/26 apprenticeship enrolments by subject area, compared with 2024/25, response rate 101.

Colleges reported having to limit apprenticeship enrolments or close courses due to staffing or space challenges in six different subject areas (see Figure 12). The most affected area was construction, planning and the built environment, with nearly a third (32%) of colleges experiencing challenges. Other affected areas include engineering and manufacturing technologies (17%), science and maths (11%), social sciences (6%), agriculture, horticulture and animal care (4%) and business administration and law (1%).

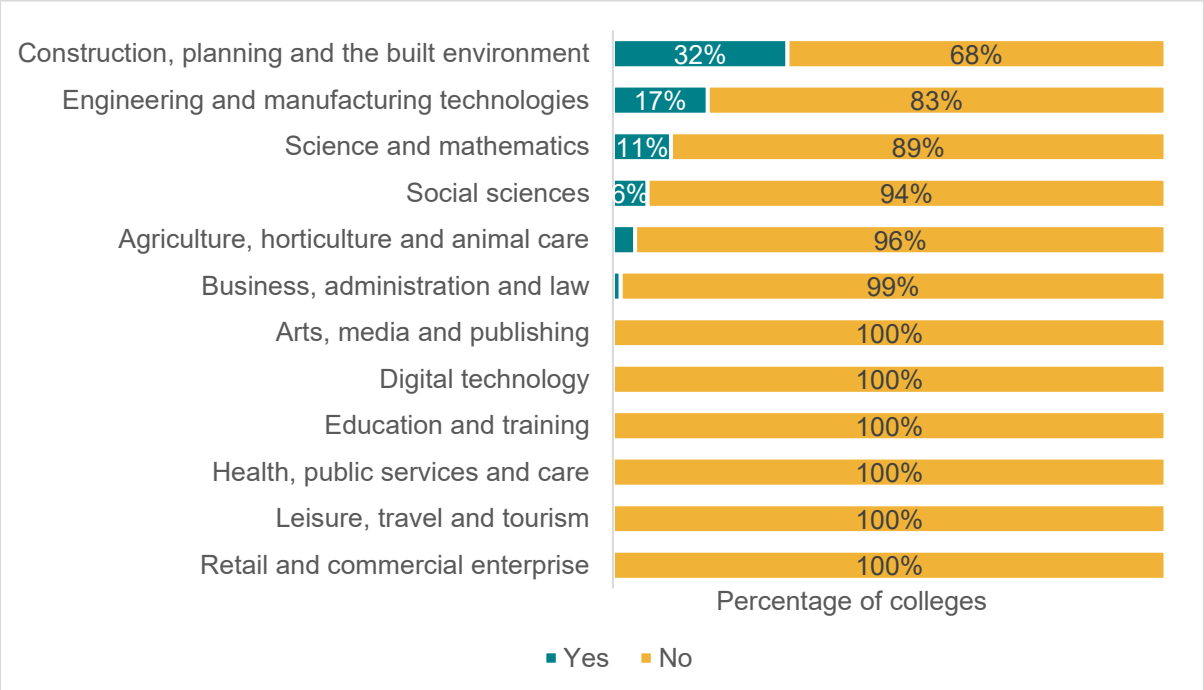

Figure 12: Subject areas where apprenticeship enrolments are limited or courses closed due to staffing or space constraints, 2025/26, response rate 100.

Overall, these findings indicate that while apprenticeship enrolments are recovering, growth is being constrained by capacity issues in high-demand technical areas, particularly construction and engineering.

2.6 Higher education (HE)

Over half (54%) of colleges reported decreases in HE enrolments in 2025/26 compared with the previous year, 10% of which were down 20% or more (see Figure 13). Over one quarter (26%) of colleges were on target and 20% reported increases, reflecting a complex picture that will be dependent on local demographics, competition, trends, employer demand and college strategies.

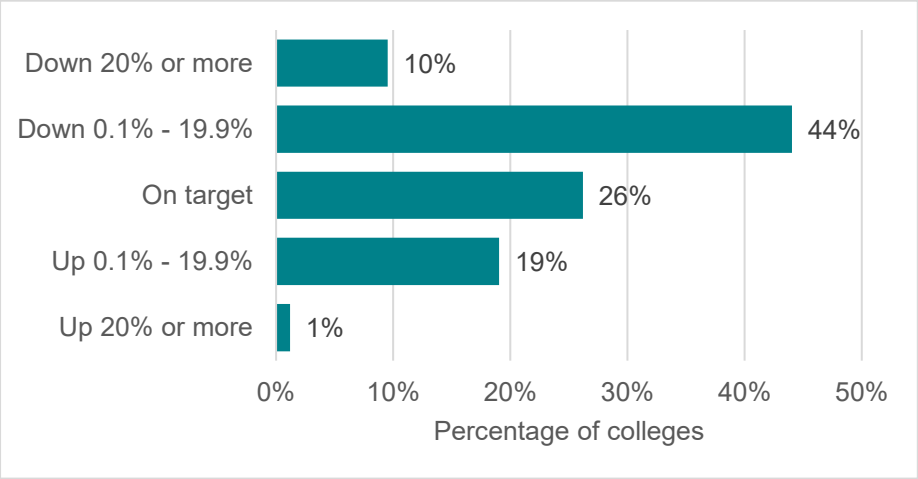

Figure 13: How 2025/26 HE enrolments compare with those in 2024/25, response rate 84.

2.7 International

Almost two-thirds (62%) of colleges with international provision were on target for enrolments in 2025/26 compared with the previous year (see Figure 14). One third (33%) of colleges reported a decline, potentially linked to tighter restrictions on student visas.

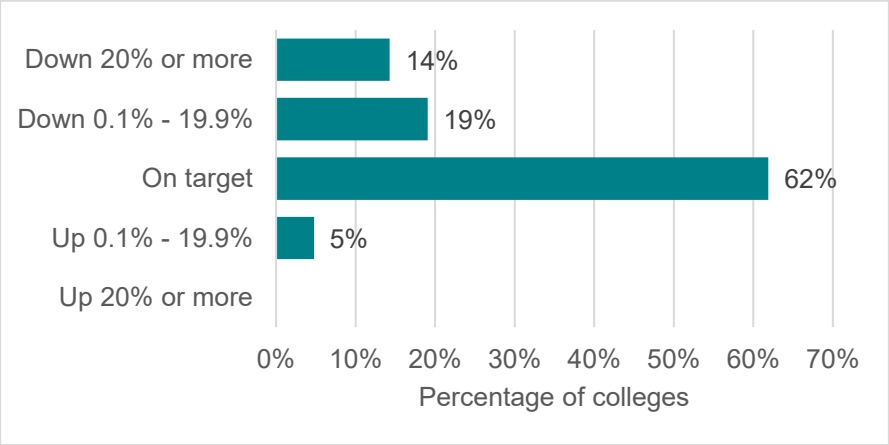

Figure 14: How 2025/26 international enrolments compare with those in 2024/25, response rate 21.[5]

[5] International enrolments are only relevant to a certain number of member colleges, resulting in a smaller sample size.

2.8 Industrial Strategy priority areas and/or health and construction courses (IS8+2)

The majority (86%) of colleges experienced increased demand for IS8+2 courses. Waiting lists were reported in all subject areas listed, most notably in construction (56%), health (33%) and advanced manufacturing (21%) – see Figure 15. These subjects with the largest waiting lists mirror those experiencing strong growth in 16 to 18 and apprenticeship enrolments, suggesting continued high demand and capacity pressures.

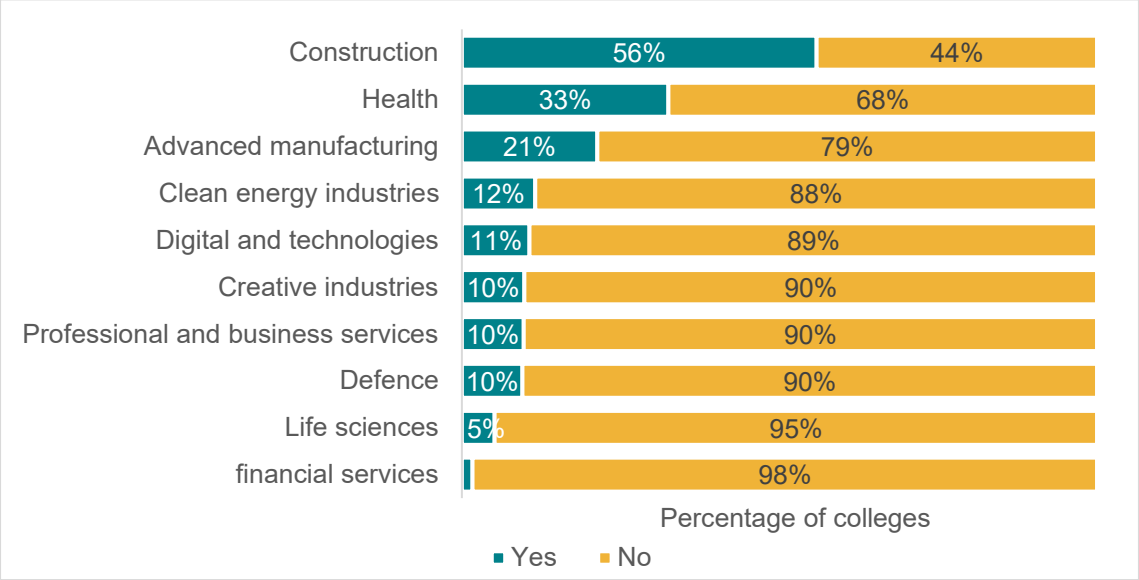

Figure 15: IS8+2 areas where colleges currently have waiting lists, response rate 100.

3. Conclusion and recommendations

This year's survey shows that there has been sustained growth in 16 to 18 enrolments. This has been particularly pertinent in construction, electrical, engineering, and health and social care. Demographic shifts and GCSE results were key drivers, though competition and cost-of-living pressures contributed to declining enrolments in some areas.

There have been persistent capacity constraints in high-demand sectors like construction and engineering where colleges face acute staffing and space shortages which have limited enrolment growth despite strong demand. Capacity issues are also affecting apprenticeship provision, especially in technical areas.

The survey showed a mixed picture in English and maths. GCSE English and maths enrolments rose in most colleges, though at lower rates than 2024. Functional skills enrolments saw smaller increases, suggesting a shift in learner preferences or institutional offer.

Most T Level subjects underperformed against expectations, with craft and design, digital, and science particularly affected. T Levels are still relatively new qualifications in an established landscape, indicating that there is still a need to build the brand.

Adult and ESOL enrolments are stable but constrained. ESOL continues to show demand and has the highest levels of unmet need (61%). Access and growth of ESOL may be influenced and impacted by regional and MSA policy decision-making. Apprenticeship enrolments are improving, especially among 16 to 18s, but growth is uneven across sectors. Construction and engineering, again, dominate growth and capacity concerns.

Whilst half of colleges reported a drop in HE enrolments, 20% are seeing growth, which indicates that local demographics, employer demand and institutional strategy are likely influencing factors.

Where colleges have international provision, this is largely on target, though visa restrictions may be dampening growth.

Our additional focus this year on courses related to the Industrial Strategy and key sectors has shown high demand in construction, health and advanced manufacturing which are often oversubscribed with waiting lists, which has potentially impacted on types of provision. For example, high demand for apprenticeships in some of these subject areas has been hampered by the availability of employers willing to take on apprentices, thus shifting demand to 16 to 18 study programmes and T Levels.

Recommendations for colleges

- Work with local and national stakeholders to identify scalable solutions for capacity challenges in high-demand areas, including phased investment, staff development, and flexible delivery models.

- Strengthen T Level promotion and employer engagement to boost awareness and uptake, especially in underperforming subjects.

- Expand ESOL and basic skills provision, particularly in regions with high unmet demand, and work with MSAs to align funding and access.

- Enhance apprenticeship pathways for 16 to18-year-olds by addressing barriers in technical sectors and supporting employer partnerships.

- Review HE strategies to adapt to shifting learner demand and local economic needs.

Recommendations for national and local policymakers and funders

- Invest in infrastructure and workforce development to relieve pressure in growth sectors and support equitable access.

- Support targeted campaigns to raise awareness of T Levels and adult learning opportunities, especially Free Courses For Jobs.

- Align funding mechanisms with demand hotspots, particularly for ESOL and IS8+2 courses, to reduce waiting lists and maximise economic impact.

- Monitor regional disparities in enrolment trends and unmet demand to inform devolved funding and planning decisions.