

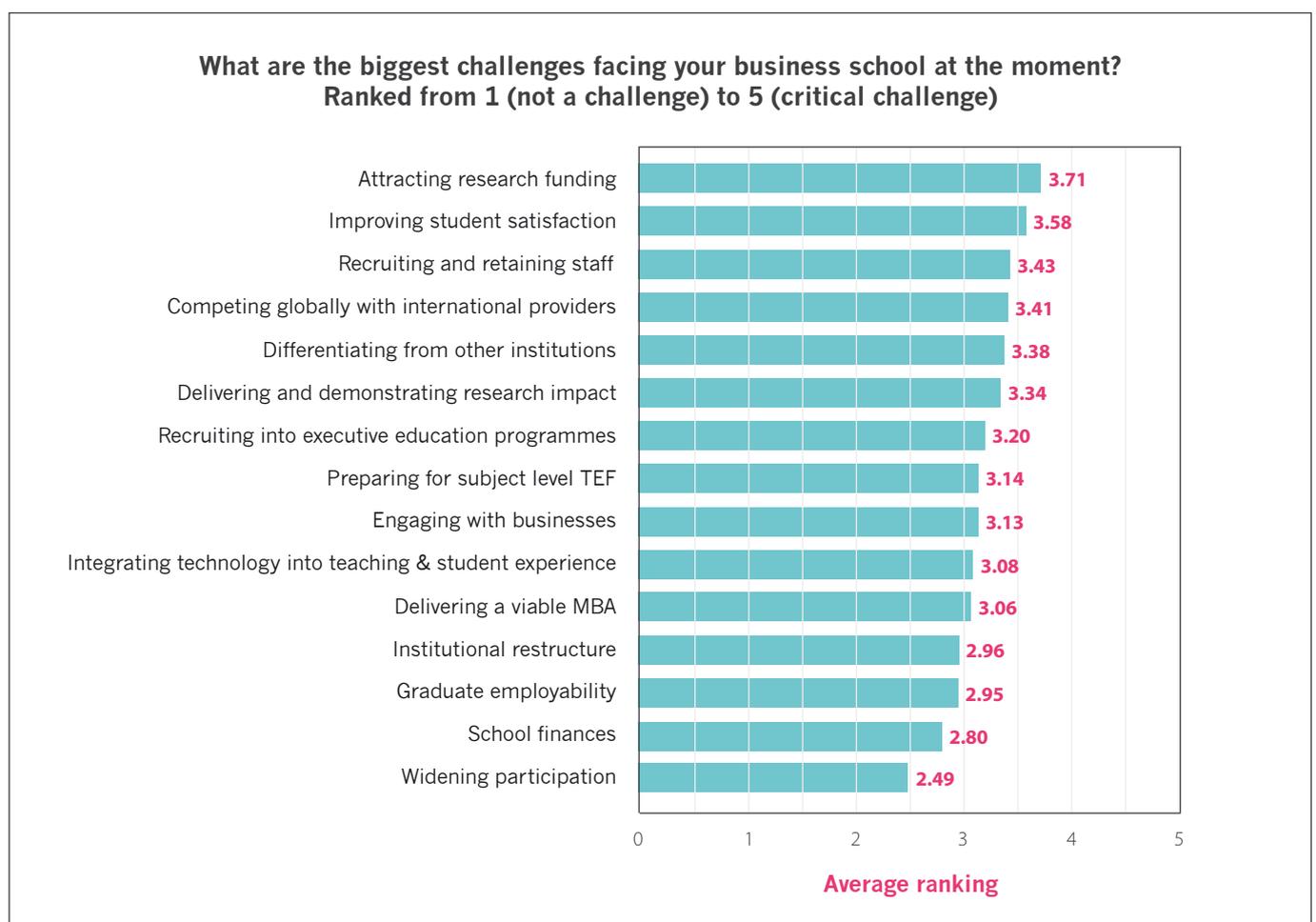
## **ANNUAL MEMBERSHIP SURVEY 2017: RESULTS**

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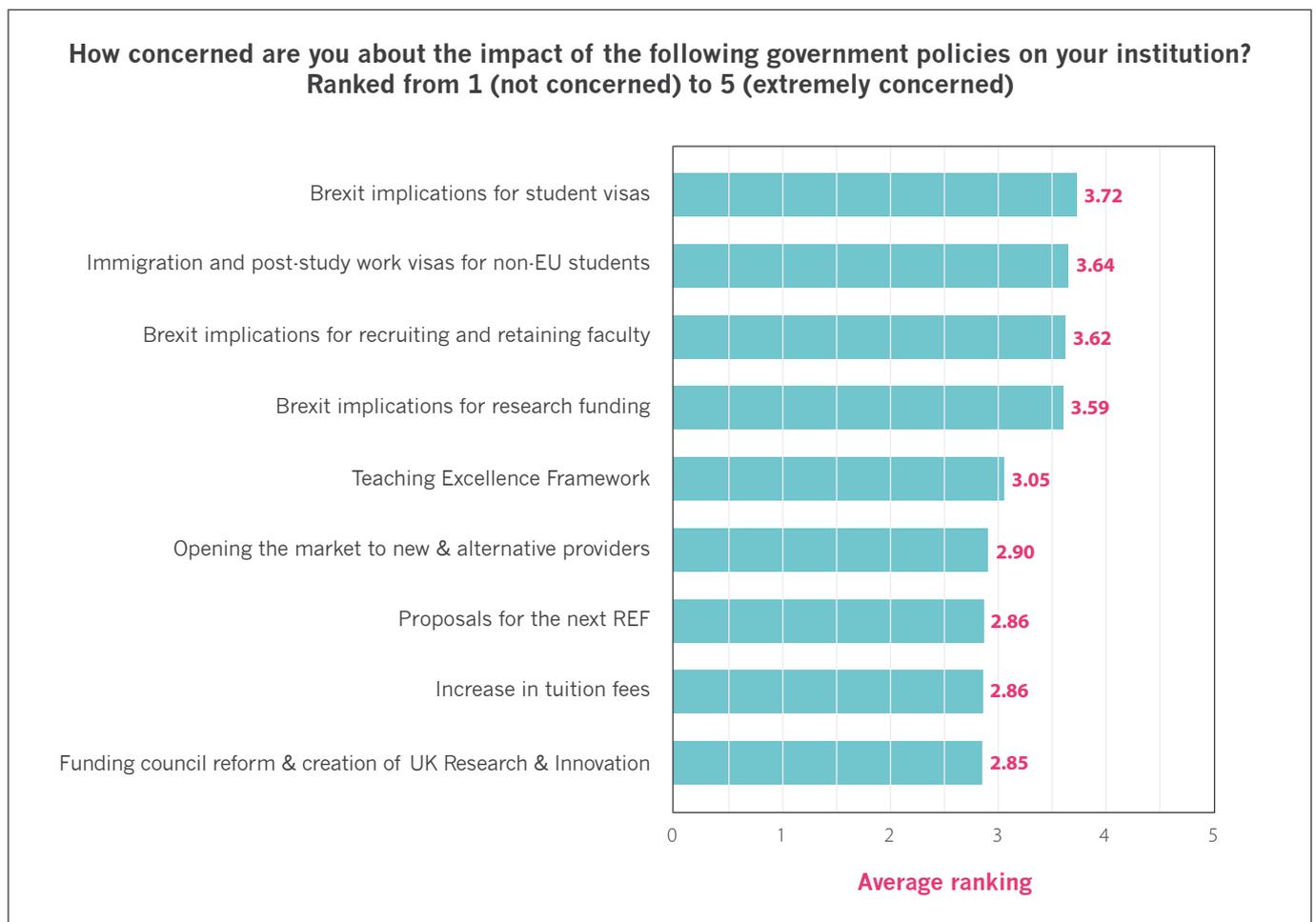
Each year, the Annual Membership Survey reveals emerging trends and challenges facing UK business schools. The survey is intended to support members by providing market intelligence and insights. It also provides a barometer on external issues and policy, which gives the Association evidence to support our lobbying and advocacy work. This year 89 institutions took part.

## Analysis

The biggest challenges facing business schools continue to be attracting research funding followed by improving student satisfaction. These were the same two major issues as reported last year.



In terms of government policy the two biggest areas of concern were both related to visas. The major concern was Brexit implications for student visas followed by immigration and post-study work visas for non-EU students.



**For the current academic year please tell us how your recruitment of EU and non-EU international students compared to last year. Answers show the percentage of business schools which have reported an increase, no change or a decrease.**

Nearly 40% of schools reported a decrease in non-UK EU student applications for undergraduate programmes. 40% of schools also saw a decrease in the number of undergraduate applications from prospective non-EU international students, although a similar number of schools reported an increase. Postgraduate applications have fared quite well, in particular from non-EU international markets from which 60% of schools have seen an increase. The decrease in postgraduate applications from non-UK EU sources may be a concern.

Applications	% of business schools with an increase	% of business schools with no change	% of business schools with a decrease
EU undergraduate (excluding UK citizens)	28.8	31.8	39.4
EU undergraduate (including UK citizens)	45.2	21.0	33.9
EU postgraduate (excluding UK Citizens)	31.7	38.1	30.2
EU postgraduate (including UK Citizens)	45.6	33.3	21.1
Non-EU international Undergraduate	37.1	22.6	40.3
Non-EU international Postgraduate	60.3	11.1	28.6

Across all categories of student more business schools reported an increase in the number of offers than a decrease. The largest level of increase was in non-EU international postgraduates with the smallest in EU undergraduates (excluding UK citizens).

Offers	% of business schools with an increase	% of business schools with no change	% of business schools with a decrease
EU undergraduate (excluding UK citizens)	33.9	44.1	22.0
EU undergraduate (including UK Citizens)	53.6	32.1	14.3
EU postgraduate (excluding UK Citizens)	48.1	36.5	15.4
EU postgraduate (including UK citizens)	45.6	33.3	21.1
Non-EU international Undergraduate	36.8	31.6	31.6
Non-EU international Postgraduate	50.9	28.1	21.1

Nearly 1 in 5 schools have reported an increase in the number of non-UK EU undergraduate students not turning up for the start of their studies. This a marginal increase on last year's survey, but largely consistent. Across all categories of student most business schools reported no change in the number of no-shows.

No Shows	% of business schools with an increase	% of business schools with no change	% of business schools with a decrease
EU undergraduate (excluding UK citizens)	18.2	70.5	11.4
EU undergraduate (including UK citizens)	23.3	67.4	9.3
EU postgraduate (excluding UK citizens)	13.6	63.6	22.7
EU postgraduate (including UK citizens)	13.6	70.5	15.9
Non-EU international Undergraduate	14.3	69.0	16.7
Non-EU international Postgraduate	19.0	66.7	14.3

**What impacts, if any, has your school felt, or is likely to feel, within the next 12 months which can be attributed to the decision for Britain to leave the EU?**

Business schools reported that the biggest impact of the decision for Britain to leave the EU is a difficulty recruiting EU staff which has already been felt by almost a quarter of respondents and a further two fifths feel this is likely to happen. 16% of institutions have already lost EU staff due to Brexit.

	Already happened (%)	Likely (%)	Unlikely (%)	Too early to say (%)	Don't know (%)
Loss of research funding from EU sources	5.7	43.9	25.2	13.0	12.2
Loss of research partners	4.9	37.4	23.6	21.1	13.0
EU research funding bids rejected	2.4	36.6	31.7	12.2	17.1
Planned EU research funding bids shelved	9.0	33.6	23.0	18.9	15.6
Loss of other planned EU funding (such as ERDF or ESF)	3.3	36.7	20.8	16.7	22.5
Planned bids for other EU funding (such as ERDF or ESF) shelved	5.7	36.9	19.7	14.8	23.0
Loss of EU staff	16.1	41.9	21.0	16.9	4.0
Difficulty recruiting EU staff	24.6	41.5	19.5	5.9	8.5
Difficulty in recruiting UK staff	6.5	10.6	12.2	58.5	12.2
Difficulty in recruiting non-EU international staff	5.0	21.5	19.0	44.6	9.9
Decline in non-EU student applications	6.5	26.8	22.0	33.3	11.4

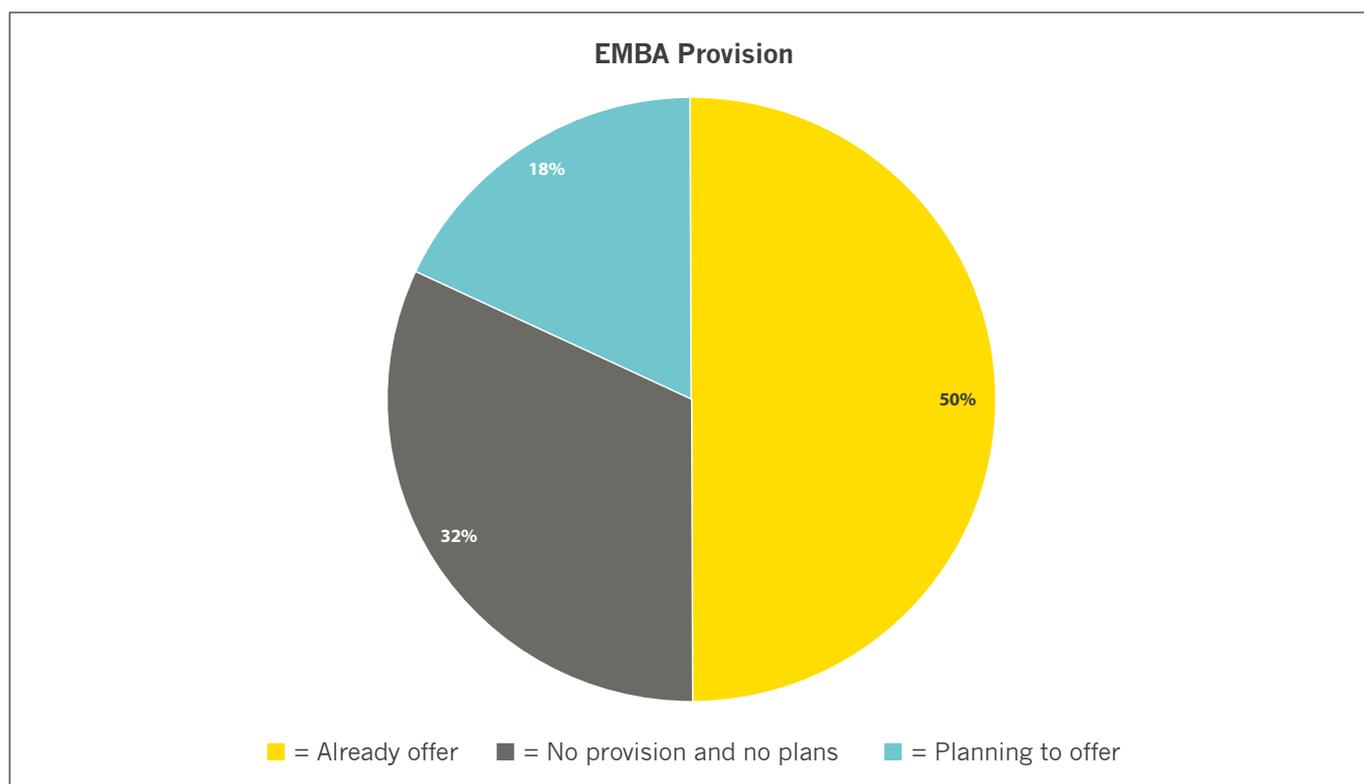
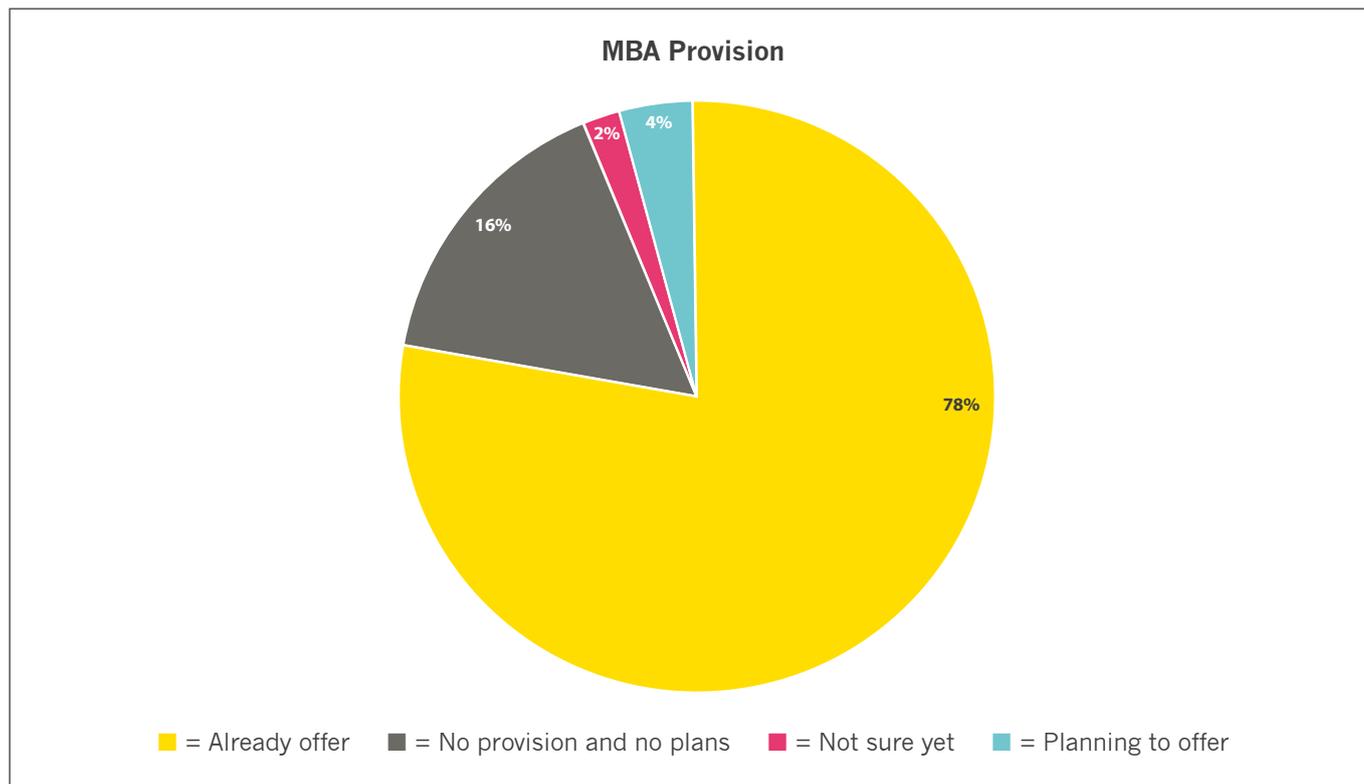
**Since the referendum result have you started putting in place any plans to mitigate post-Brexit impacts?**

Following the EU referendum, the majority of business schools have already diversified their student recruitment into new markets outside of the EU. 2 in 5 institutions have identified research collaborators outside of the EU.

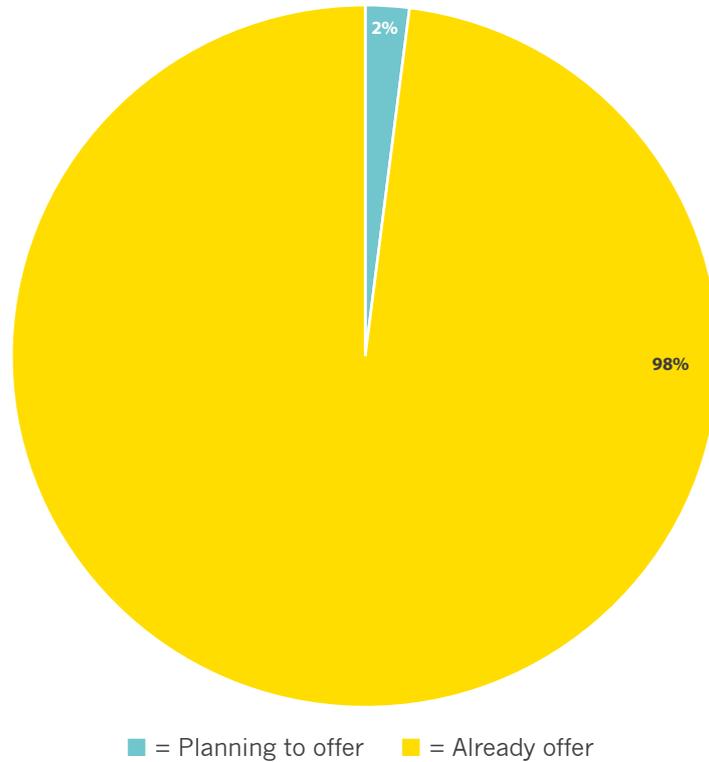
	Identified research collaborators outside the EU (%)	EU based research partners have committed to working with you (%)	Targeting new student markets outside of the EU (%)	Looking at branch campuses in Europe (%)	Offering dual awards with European partner institutions (%)
Already happened	40.0	22.2	62.2	11.1	17.8
Likely	15.6	24.4	22.2	11.1	24.4
Too early to say	31.1	33.3	11.1	33.3	26.7
Unlikely	6.7	4.4	4.4	35.6	26.7
Don't know	6.7	15.6	0	8.9	4.4

### Which of the following programmes do you currently run?

The biggest growth area is set to be in EMBA provision where 18% of respondents who do not currently offer this qualification are planning to do so. No institutions reported that they were planning to stop offering an MBA, EMBA or specialised masters.

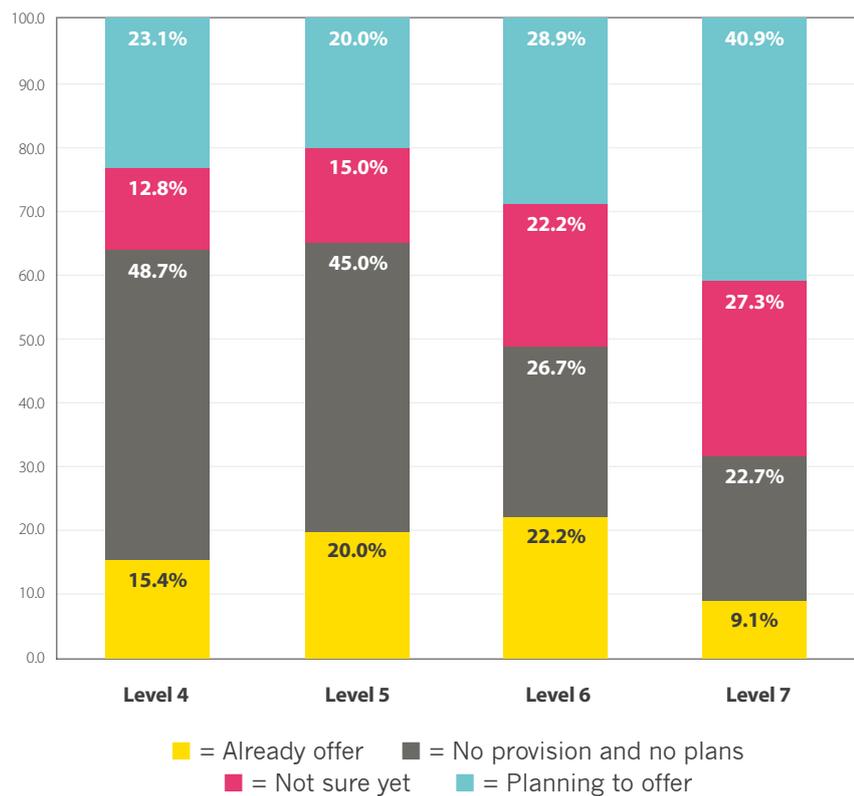


### Specialised Masters Provision



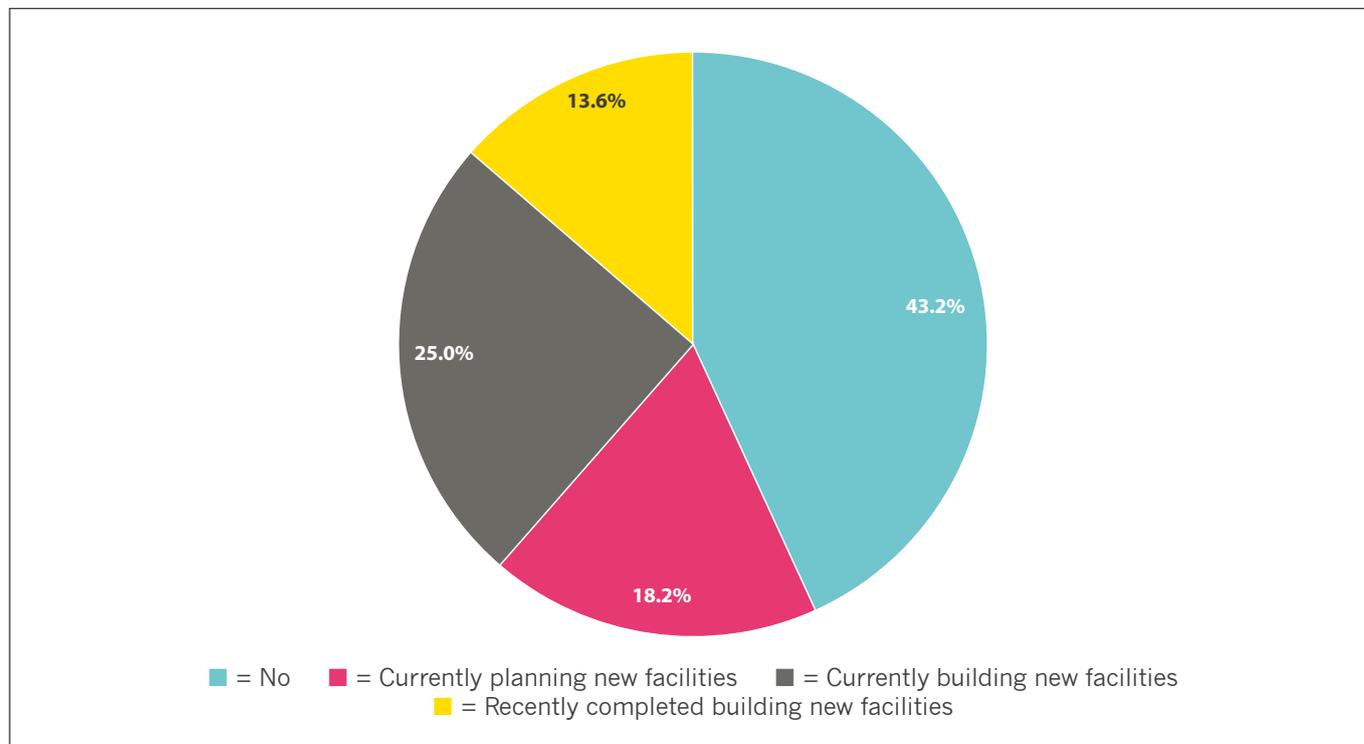
### Do you offer or plan to offer the following apprenticeship programmes?

The greatest increase in the provision of apprenticeships is planned at level 7 followed by level 6. Almost half of business schools reported that they had no provision or plans to offer apprenticeships at level 4 or 5.



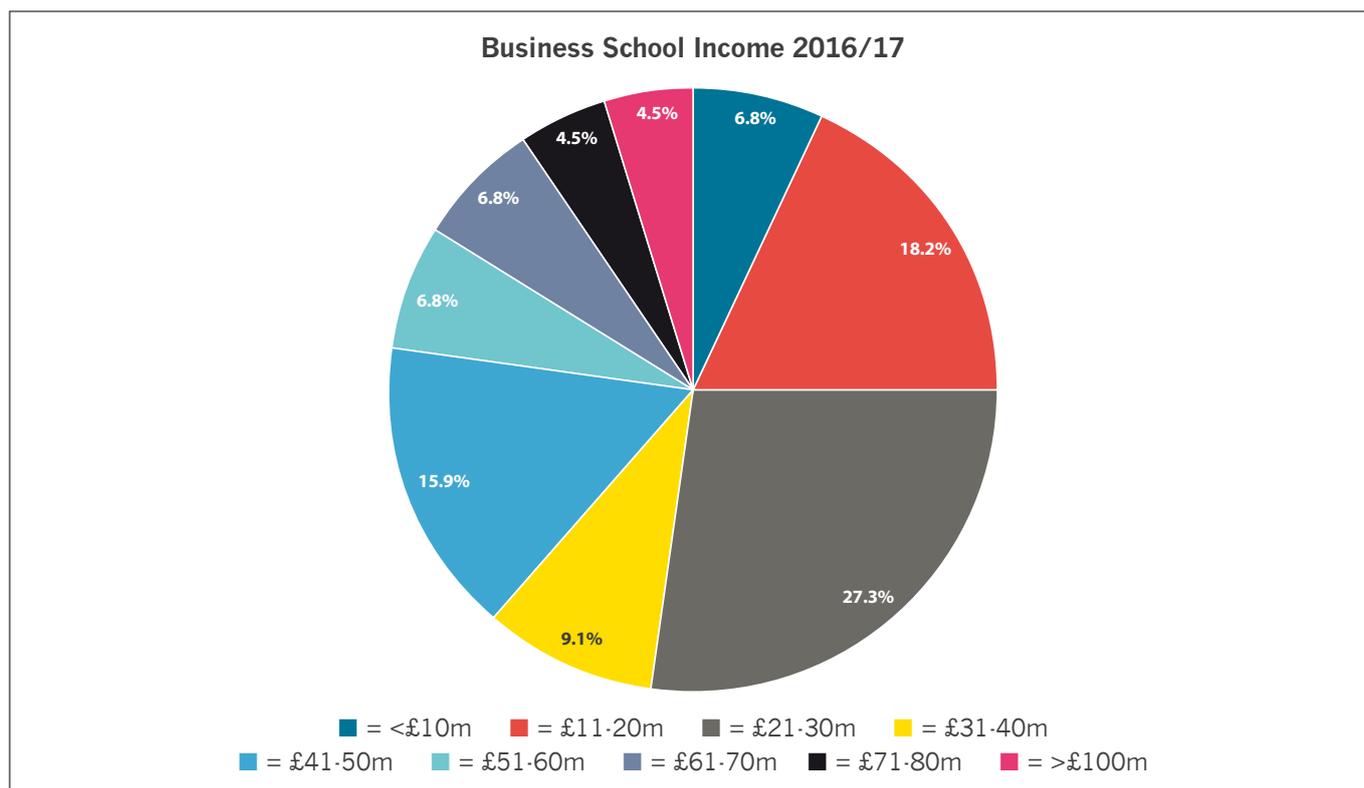
### Are you in the process of or are you planning to build new facilities?

With 2 in 5 schools currently building new facilities or planning to do so, there is currently considerable investment into business school estates.



### Business school finances

Just over half of respondents reported having an income between £11M – £40M. Approximately two-thirds have seen their income increase compared to last year.







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