ANNUAL MEMBERSHIP SURVEY 2020: RESULTS
CHARTERED ABS ANNUAL MEMBERSHIP SURVEY 2020: RESULTS

The Chartered ABS Annual Membership Survey is our annual review of the UK business school sector and is used to learn about the challenges facing our members. This year’s survey seeks to build a picture of how the sector is responding to the unprecedented challenges arising from Covid-19, including how student recruitment has performed. The data generated by the survey is also used to support our lobbying and advocacy work. This year’s survey was completed by Deans from 39 business schools in the UK.

Student Recruitment

Note: the results in figures 1 to 4 and tables 1 and 2 refer exclusively to enrolments for courses due to start in the autumn term of 2020/21.

**Figure 1:** Year-on-year change in the proportion of applications converted to enrolments (2020/21 compared to 2019/20)
• For UK undergraduate and postgraduate students, approximately 80% of the business schools who responded to the survey reported that the proportion of applications for 2020/21 that were converted into actual enrolments either increased or stayed about the same relative to 2019/20.

• For UK undergraduate students, 22% reported a slightly lower conversion rate compared to last year and 15% reported the same for UK postgraduate students. That only a minority of schools are reporting a lower conversion rate would suggest that demand for Business & Management courses amongst prospective UK students has been fairly robust despite, or perhaps because of, the backdrop of Covid-19.

• In relation to EU students the share of the responding business schools reporting a lower conversion rate in 2020/21 was greater than for students from the UK. For EU undergraduate and postgraduate students 40% and 43%, respectively, of the schools reported a slightly or significantly lower proportion of converted applications. On the plus side, around one-third of schools reported that their conversion rate for EU students was approximately the same as last year.

• The results are similar for non-EU international students where 47% and 58% of the responding business schools reported a lower application conversion rate for undergraduate and postgraduate students, respectively. For the international postgraduates, 32% of the schools said that the conversion rate was significantly lower than in 2019/20. However, there is some diversity in these results with around 30% of the schools reporting a higher conversion rate for non-EU international students for both undergraduate and postgraduate study.

• The above results showing the change in the proportion of applications converted into enrolments by institution incorporation are based on small sample sizes and should therefore be treated with caution. However, they do give an indication as to how the responding pre-1992 and post-1992 institutions have fared during recruitment for courses starting in the autumn of 2020/21.

• For UK undergraduate students, 60% of the pre-1992 institutions who responded to the survey reported a higher conversion rate, compared to 29% of the post-1992 institutions. Conversely, 35% of the post-1992s reported a lower conversion rate, compared to 10% of the pre-1992s.

• The results for the recruitment of EU students do not vary significantly by institution incorporation, although a somewhat higher proportion of the post-1992 responding institutions reported a lower conversion rate than in 2019/20.

### Table 1: Year-on-year change in the proportion of applications converted to enrolments: institution results split by incorporation status

<table>
<thead>
<tr>
<th>As % of responding schools in each incorporation type</th>
<th>Significantly/Slightly Higher</th>
<th>Approximately the same</th>
<th>Significantly/Slightly Lower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home UK - Undergraduate</td>
<td>60%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Home UK - Postgraduate</td>
<td>50%</td>
<td>41%</td>
<td>23%</td>
</tr>
<tr>
<td>EU - Undergraduate</td>
<td>25%</td>
<td>24%</td>
<td>40%</td>
</tr>
<tr>
<td>EU - Postgraduate</td>
<td>30%</td>
<td>18%</td>
<td>30%</td>
</tr>
<tr>
<td>Other International - Undergraduate</td>
<td>35%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Other International - Postgraduate</td>
<td>18%</td>
<td>44%</td>
<td>5%</td>
</tr>
</tbody>
</table>

The above results showing the change in the proportion of applications converted into enrolments by institution incorporation are based on small sample sizes and should therefore be treated with caution. However, they do give an indication as to how the responding pre-1992 and post-1992 institutions have fared during recruitment for courses starting in the autumn of 2020/21.

For UK undergraduate students, 60% of the pre-1992 institutions who responded to the survey reported a higher conversion rate, compared to 29% of the post-1992 institutions. Conversely, 35% of the post-1992s reported a lower conversion rate, compared to 10% of the pre-1992s.

The results for the recruitment of EU students do not vary significantly by institution incorporation, although a somewhat higher proportion of the post-1992 responding institutions reported a lower conversion rate than in 2019/20.
• For the recruitment of non-EU international students, the results by institution incorporation vary by level of study. Around one-third of the pre-1992 institutions participating in the survey reported that a higher proportion of undergraduate applications were converted into enrolments relative to last year, compared to 25% of the post-1992 institutions. More than half of the post-1992s reported a lower conversion rate at undergraduate level than in 2019/20, compared to 40% of the pre-1992s.

• The reverse is the case for postgraduate non-EU international students, with 44% of the post-1992 institutions reporting a higher conversion rate than last year, compared to 18% of the pre-1992s. Three-quarters of the pre-1992s stated that their conversion rate for international postgraduate students was lower than last year.

**Figure 2:** Year-on-year change in enrolments of new students (2020/21 compared to 2019/20)
A fairly positive outlook for the recruitment of UK students is again evident from the question comparing enrolments of new students for 2020/21 with 2019/20. 53% and 58% of schools reported higher enrolments of undergraduate and postgraduate students, respectively. In the case of UK undergraduate students, 36% of the schools stated that enrolments were significantly higher. Overall 81% of the schools reported stable or higher enrolments for new UK students at undergraduate level and 84% for new UK students at postgraduate level.

For EU students a much higher proportion of the schools have seen fewer enrolments, with 33% and 41%, respectively, reporting that enrolments at undergraduate and postgraduate level were either slightly or significantly lower than in 2019/20. Demand from EU students would appear to be more robust at undergraduate level, with 42% of the schools reporting that enrolments were approximately the same and 24% reporting an increase.

The results for non-EU international students again suggest quite a challenging environment. At undergraduate level 50% of the business schools stated that enrolments were either slightly or significantly lower than in 2019/20 and 56% reported the same for postgraduate courses. In the case of the latter, 42% reported that enrolments were significantly lower than last year. Just under one-third of the schools had a contrasting experience, reporting that enrolments for international students were either slightly or significantly higher than last year.

The results in table 2 show the change in the enrolments of new students starting in the autumn of 2020/21 compared to 2019/20 split by the incorporation of the responding institutions. It should again be treated as indicative only due to the small sample sizes.

<table>
<thead>
<tr>
<th>As % of responding schools in each incorporation type</th>
<th>Significantly/Slightly Higher</th>
<th>Approximately the same</th>
<th>Significantly/Slightly Lower</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home UK - Undergraduate</td>
<td>74%</td>
<td>29%</td>
<td>21%</td>
</tr>
<tr>
<td>Home UK - Postgraduate</td>
<td>71%</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>EU - Undergraduate</td>
<td>19%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>EU - Postgraduate</td>
<td>22%</td>
<td>24%</td>
<td>42%</td>
</tr>
<tr>
<td>Other International - Undergraduate</td>
<td>33%</td>
<td>25%</td>
<td>11%</td>
</tr>
<tr>
<td>Other International - Postgraduate</td>
<td>25%</td>
<td>38%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Table 2: Year-on-year change in enrolments of new students: institution results split by incorporation status

The results in table 2 show the change in the enrolments of new students starting in the autumn of 2020/21 compared to 2019/20 split by the incorporation of the responding institutions. It should again be treated as indicative only due to the small sample sizes.

Three-quarters of the pre-1992 institutions who responded to the survey have seen higher enrolments for UK undergraduate students than in 2019/20, compared to 29% of the post-1992s. Furthermore, 35% of the post-1992s reported lower enrolments for UK undergraduate students.

The results are similar for enrolments of UK students at postgraduate level. The majority of the pre-1992s again reported higher enrolments than last year, compared to 41% of the post-1992s. The results suggest that for UK students the post 1992s have fared slightly better at postgraduate level than at undergraduate level.
• For the enrolment of students from the EU at undergraduate level, nearly one-third of the post-1992s reported that enrolments were higher than in 2019/20, compared to 19% of the pre-1992s. Half of the responding pre-1992 institutions stated that enrolments were approximately the same, compared to 35% of the post-1992s. At postgraduate level, 47% of the post-1992s reported lower enrolments for EU students, compared to 37% of the pre-1992s.

• One-third of the pre-1992s reported higher enrolments than in 2019/20 for non-EU international undergraduates, compared to 25% of the post-1992s. Over half of the pre-1992s reported lower enrolments for international undergraduates as did 44% of the post-1992s.

• For non-EU international students the pre-1992s again report more adverse results for postgraduate enrolments, with 75% reporting lower enrolments than last year and 25% higher enrolments. For the post-1992s 38% reported higher enrolments, 31% relatively unchanged and 31% lower enrolments.

Figure 3: Expected year-on-year change in no-shows for new students (2020/21 compared to 2019/20)
• The responding business schools were asked early in the new academic year about their expectations as to how no-shows for new students might change compared to 2019/20. For new UK undergraduate and postgraduate students, the majority of the business schools were expecting the number of no-shows to be approximately the same as in 2019/20 at the time of completing the survey. For new UK undergraduate students one-third of the schools were expecting no-shows to be higher than last year but none expected them to be significantly higher. For new postgraduate students the proportion of schools expecting to see slightly higher no-shows is 22% which is lower than what is expected for new undergraduate students.

• For new undergraduate and postgraduate students from the EU half of the business schools anticipated no-shows to be largely unchanged from 2019/20. For new EU undergraduate students 26% of the schools expect no-shows to be slightly higher in 2020/21 and 24% expect them to be either slightly or significantly lower. For new postgraduate students from the EU 32% of the schools expect no-shows to be higher than last year which is more than expected for new undergraduate students from the EU.

• The results are very different for new students from non-EU international countries than for those from the UK or EU. For new non-EU international students two-thirds of the responding business schools anticipate no-shows to be higher than in 2019/20 with little difference in the results by level of study. For new undergraduate non-EU international students 15% expect no-shows to be approximately the same as last year and 11% reported the same for postgraduate non-EU students.

• Across all of the results in figure 3 it is noticeable that the proportion of business schools reporting that they expect no-shows to be lower than last year are in the minority. Overall these results indicate the extent of the expected impact of the Covid-19 pandemic on students’ study plans.
Figure 4: Expected year-on-year change in no-shows for existing students (2020/21 compared to 2019/20)

- The results in figure 4 refer to expectations for the change in the number of no-shows for existing students based on the respondents’ understanding early in the new academic year. In general the responding business schools were not anticipating a substantial change in the number of no-shows for existing students for the new academic year of 2020/21. For existing UK undergraduate and postgraduate students, 75% and 86%, respectively, were anticipating that no-shows would be approximately the same as for 2019/20. For existing UK undergraduate students 20% of the schools expect no-shows to be higher than last year and only 3% expect this to be the case for UK postgraduates.

- The results for existing EU students are similar to those for the UK, with the majority of the schools anticipating that no-shows will be similar to last year, although it is noticeable that compared to UK postgraduates a larger proportion expect no-shows to be either slightly or significantly higher in 2020/21. For existing EU undergraduate students, 18% expect no-shows to be slightly lower than in 2019/20 and 12% reported the same in relation to postgraduate students.

- For existing undergraduate students from non-EU countries, 32% of the responding business schools were expecting no-shows to be either slightly or significantly higher in 2020/21, which is more than for any other domicile and level of study, and 50% expected that no-shows would be unchanged. In contrast, for existing non-EU postgraduate students, a lower proportion of the schools anticipate that no-shows will be higher in 2020/21 (15%) and nearly two-thirds believe they will be approximately the same.
Figure 5: Expected start date for students who will not start their course in the autumn

- When respondents were asked about start dates for students who had accepted a place for the new academic year but have deferred their start date, January 2021 was cited in 56% of the responses, the Spring of 2021 in 7% of the responses, and the autumn of the following academic year in 33% of the responses. Of the other start dates suggested, these included November 2020, March 2021 and June 2021.
The respondents were asked about the present mode of study for all students in their business school at the time of completing the survey in October 2020. Blended was most common, with an average of 66% and 60% of undergraduates and postgraduates, respectively, engaged in this mode of study across the responding business schools. The proportion reported to be studying entirely on-campus was very low at 5% for both levels of study.

For undergraduate students the average proportion of students studying entirely online was 29%, which is somewhat lower than for postgraduate students where an average of 35% were reported to be studying entirely in this mode.

It is important to note that the results in figure 6 represent a snapshot of the study modes of business school students at the start of the academic year and due to the escalating Covid-19 situation it is plausible that by the time of the publication of this report a higher proportion of students will now be studying entirely online.
Are you planning to change your international student recruitment targets for the next academic year of 2021/22?

- Respondents were asked if their school was planning to change its international student recruitment targets for the following academic year of 2021/22 and 40% said that their targets will be increased, 39% said that targets will be largely unchanged and 8% said that targets would be decreased. A further 13% of respondents were unsure as to how their school’s international recruitment targets might change.

**Figure 7: Change in international student recruitment targets for the academic year of 2021/22**

- Blue = Yes – targets will be increased
- Red = Yes – targets will be decreased
- Black = No – targets will be largely unchanged
- Yellow = Don’t know

Chartered ABS Annual Membership Survey 2020
Page 11
Impact of the Covid-19 pandemic

Figure 8: Recruitment freeze for academic and professional services staff

- Of the business schools participating in the survey, 45% said they had a recruitment freeze in place for academic staff and a higher proportion had a recruitment freeze in place for professional services staff (58%).

- From the written comments on this topic there were several responses that a partial recruitment freeze had been put in place by the business school but that it was still possible to make appointments for essential posts.

<table>
<thead>
<tr>
<th></th>
<th>Academic Staff</th>
<th>Professional Services Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you currently have a recruitment freeze in place for academic and professional services staff?</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Table 3: Percentage of academic and professional services staff on furlough as of 30 September 2020 (average across all responding business schools)

- As of the end of September 2020 business schools would appear to be making minimal use of the government’s furlough scheme with an average of 2% of academic staff and 3% of professional services staff across the responding institutions reported as being on furlough.
What action has your school taken in relation to staff redundancies since the onset of the Covid-19 pandemic?

- A majority of the responses to the question on redundancies since the onset of the Covid-19 pandemic revealed that no redundancies had been made (60%). The second most commonly received response was that voluntary redundancies had been made (31%). A minority of the responses said that their schools had made compulsory redundancies or planned to introduce either voluntary or compulsory redundancies.

- Of the institutions who said they had made redundancies since the start of the pandemic, the average percentage of total business school staff affected was 7%.
Figure 10: Covid-19: change in priorities when recruiting academic staff

- Since Covid-19 was declared a pandemic 68% of the responding business schools had not changed the focus of their priorities when recruiting academic staff and 16% said their recruitment focus had shifted towards teaching. None of the schools stated that the focus of their recruitment had shifted towards research.

---

1 Some of the schools who reported a recruitment freeze in their response to the question in figure 8 did not select this answer in their response to the question in figure 10, hence the lower proportion of schools reporting a recruitment freeze compared to the results in figure 8.
Through which of the following approaches is your school supporting businesses through the Covid-19 crisis?

- Business growth/resilience programmes: 38%
- Consultancy activities: 28%
- Management KTPs: 16%
- None of the above: 13%
- Other: 5%

**Figure 11: Covid-19: approaches to supporting businesses through the crisis**

- The most common approach through which business schools are supporting businesses during the Covid-19 crisis is business growth/resilience programmes, cited in 38% of the responses to this question. Consultancy activities were the second most frequently cited approach (28%), followed by Management KTPs (16%). Of the other support methods being used, the approaches mentioned include the provision of data, digital marketing support and advice related to innovation.
Business School finances

Figure 12: Actual and expected change in business school income (2019/20 to 2020/21)

- In relation to the financial year of 2019/20, 61% of the business schools participating in the survey saw an increase in income relative to 2018/19 and 18% reported relatively unchanged income. An additional 21% saw a decline in income but in most cases this was moderate.

- For actual income in 2019/20 compared to what had been expected, nearly half of the schools reported an increase and for one-third the income was approximately as expected. For 21% of the schools the actual income was less than expected but the shortfall was again moderate in most cases. These results suggest that for the 2019/20 financial year most schools had not yet felt any adverse impact as a result of the Covid-19 disruption.

- Perhaps unsurprisingly, the results for expected income in 2020/21 are less optimistic, with 50% of the schools anticipating a fall in their income, of which 18% expect a significant fall. However, there is some variation in the results, as 18% of schools expect income to stay approximately the same as in 2019/20, and a further 31% expect to see either a moderate or significant increase.
Table 4: Percentage of business school net income contributed to the parent institution in the financial year of 2019/20

- The average percentage of net income that went to the parent institution in the financial year of 2019/20 was 56% across the business schools responding to the survey, and for three-quarters of the schools the net contribution ranges from between 31% and 70%.

<table>
<thead>
<tr>
<th>% Contribution to parent institution</th>
<th>1-10%</th>
<th>11-20%</th>
<th>21-30%</th>
<th>31-40%</th>
<th>41-50%</th>
<th>51-60%</th>
<th>61-70%</th>
<th>71-80%</th>
<th>81-90%</th>
<th>91-100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>As % of responding business schools</td>
<td>0%</td>
<td>3%</td>
<td>9%</td>
<td>13%</td>
<td>13%</td>
<td>19%</td>
<td>31%</td>
<td>3%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Faculty development

Figure 13: Priority in the development of teaching faculty since the Covid-19 crisis

- Almost all of the responding business schools reported that the development of teaching faculty had become a greater priority in response to the Covid-19 crisis, which likely reflects the recognition of the importance of staff being able to deliver effectively in both blended and online formats. This is expressed in several written responses to this question in which it was stated that business schools had made significant investment in developing technical skills for digital learning technology.
Equality, Diversity and Inclusion

Figure 14: Race Equality Charter – Bronze Award

• The business schools who participated in the survey show high engagement with the Race Equality Charter, with 22% already having the REC’s Bronze Award and 62% either preparing an application for the Bronze Award or exploring the possibility of applying. The remaining 16% said they were not considering applying for the Award.
Intentions toward applying for the REC’s Silver Award are less clear as 37% of the responding schools have plans to make an application, a further 37% have no such plans and 26% are unsure. It would appear that institutions usually achieve the Bronze Award before applying for the Silver Award, and the written responses to this question suggest that some schools who already hold the Bronze Award have an ambition to apply for the Silver Award in future but first plan to consolidate their Bronze status.
The results for figure 16 show that nearly 50% of the responding schools are already engaged in work related to decolonising the curriculum and a further 32% are considering undertaking such work. Of the remainder 13% said they had not done any such work and 8% were unsure.
Addressing the Award Gap

The responses reveal that BAME students are the biggest focus of efforts by UK business schools to address award gaps, with three-quarters of respondents stating that this was a focus for their school. Students from widening participation backgrounds was cited by 52% of respondents as being an award gap being addressed by their school, and 39% cited students with a disability. Much lower proportions of respondents cited gender and students with specific previous qualifications as areas of focus, with 26% and 22%, respectively, stating that their school was working to address award gaps in these areas.

**Figure 17: Award gaps being addressed by UK business schools**

The responses reveal that BAME students are the biggest focus of efforts by UK business schools to address award gaps, with three-quarters of respondents stating that this was a focus for their school. Students from widening participation backgrounds was cited by 52% of respondents as being an award gap being addressed by their school, and 39% cited students with a disability. Much lower proportions of respondents cited gender and students with specific previous qualifications as areas of focus, with 26% and 22%, respectively, stating that their school was working to address award gaps in these areas.

**Ethnic groups within BAME being focused on as part of efforts to address the award gap**

Respondents who stated that their school was working to address the award gap amongst BAME students were asked to describe which specific ethnicities were the focus of these efforts. Most of the respondents commented that students from the black ethnicity would be the main focus but several said their school was focusing on all ethnicities within the BAME grouping. A few respondents stated that their school had a particular focus on Asian students (UK students from a South-East Asian background).

**Interventions used by business schools to address award gaps**

Respondents were asked to describe any interventions their school was currently using to address award gaps. A range of measures were mentioned, including mentoring/personal tutors, creating more inclusive curricula, reading list reviews, training for programme leaders, and recruitment of diverse employees.