

Enrollment and Internationalization in the U.S. and U.K.

Present Impacts and Future Implications of COVID-19

ACE® American Council on Education®

Universities UK International



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About ACE

The American Council on Education (ACE), the major coordinating body for the nation's colleges and universities, is a membership organization that mobilizes the higher education community to shape effective public policy and foster innovative, high-quality practice. ACE represents over 1,700 college and university presidents and the executives at related associations, and are the only major higher education association to represent all types of U.S. accredited, degree-granting institutions: two-year and four-year, public and private. ACE members represent two out of every three students in all accredited, degree-granting institutions.

About Universities UK

Universities UK is the collective voice of 140 universities in England, Scotland, Wales, and Northern Ireland. Universities UK International's purpose is to enable U.K. universities to flourish internationally through our unique ability to represent them and act in their collective interests.



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ABOUT THE SURVEY

Driven by a shared interest in understanding how higher education leaders perceive similar issues in two different countries, the American Council on Education and Universities UK International partnered to field a national survey of college and university leaders in their respective countries. Designed to better understand the impact of the COVID-19 on their institutions, the survey provides a snapshot of fall 2020 enrollment trends, demonstrates how the pandemic has affected institutional priorities, and points to potential future implications for internationalization efforts in the United States and the United Kingdom.

While institutions in both countries have certainly felt the impact of the pandemic in various and often similar ways, the higher education systems in which they operate present some important contextual differences. Higher education in the United States includes more than 4,000 degree-granting public, private, and for-profit colleges and universities. These institutions operate with diverse missions and academic offerings ranging from short-term certificate programs to research doctorates. The Carnegie Classification of Institutions of Higher Education offers a framework with which to describe colleges and universities based on the programs offered, degree levels awarded, and research activity.¹ In the United Kingdom, a system of 165 institutions of higher education often offers a full range of undergraduate and post-graduate-taught degrees and research degrees—offered within a single institution.

In total, 268 college and university presidents in the U.S. and 68 pro-vice-chancellors international (PVICI) or equivalent at universities in the U.K. responded to share their most pressing concerns, and their views on strategies and priorities for internationalization beyond the COVID-19 pandemic. The survey conducted during November of 2020.² What follows is a summary of our key findings.

1 For more information about the diversity of U.S. higher education institutions, see the Basic Carnegie Classification of Institutions of Higher Education: https://carnegieclassifications.iu.edu/classification_descriptions/basic.php.

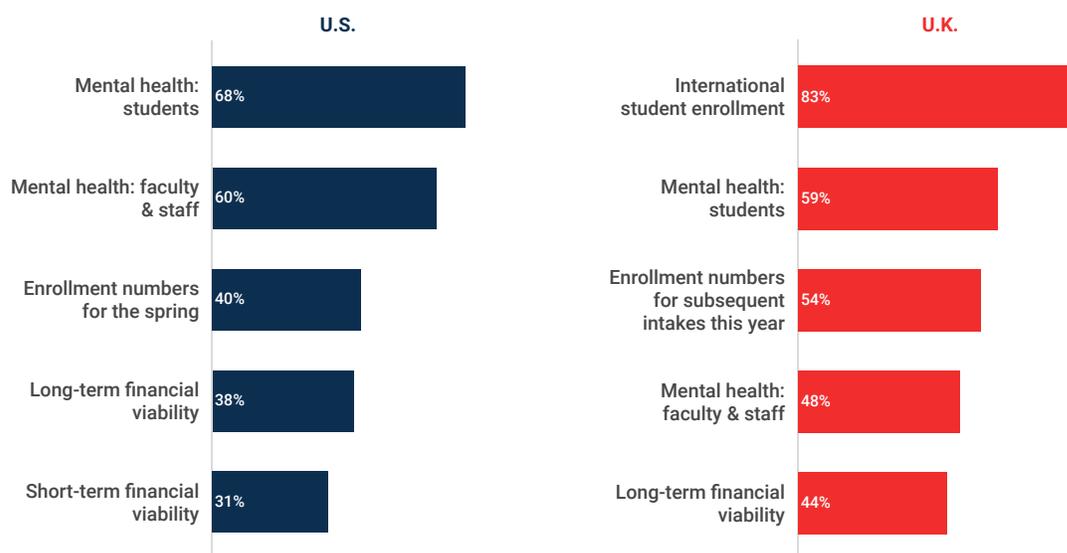
2 The U.S. survey was launched on November 10 and closed on November 17. The U.K. survey was launched on November 10 and closed on November 24.

In both the U.S. and the U.K., mental health and long-term financial viability top the list of pressing campus concerns.

In the survey, institutions both in the United States and in the United Kingdom were presented with a list of 18 issues and asked to select *up to five* that they view to be most pressing for them currently (see Figure 1).

- Eighty-three percent of U.K. respondents reported that international student enrollment was a top-of-mind issue for them. The high priority reflected in this category is unsurprising given that U.K. survey respondents were PSCI.
- Student mental health was a top-of-mind issue selected by higher education leaders in both countries, with nearly 70 percent of U.S. presidents and 59 percent of U.K. respondents identifying this as among their most pressing issues.
- Other similarities emerged as well, with U.S. and U.K. leaders both indicating the following top priority areas: “mental health of faculty and staff,” “enrollment numbers for the spring/subsequent intakes this year,” and “long-term financial viability.”

Figure 1. Most Pressing Issues Facing Higher Education Leaders in November in the U.S. and the U.K.



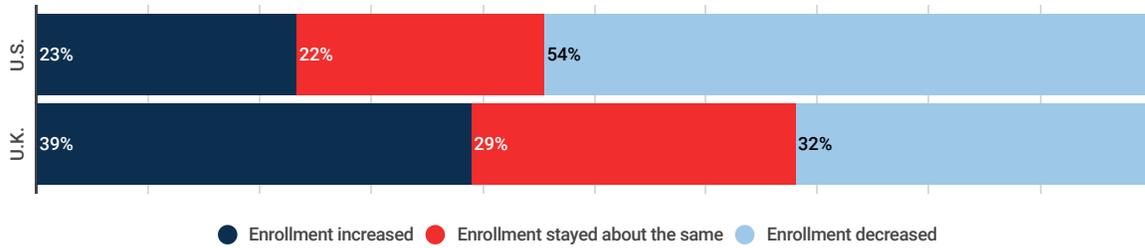
Many institutions in both countries saw a decline in total enrollment in fall 2020 relative to fall 2019. However, nearly a quarter of U.S. respondents and 40 percent of U.K. respondents reported total enrollment *increases* in fall 2020.

With the fall 2020 term in full swing, college and university leaders were asked to report on how their institutions’ fall 2020 enrollment compared with their fall 2019 enrollment. For each category, respondents could report that their enrollment had increased, decreased, or stayed about the same relative to fall 2019.

- More than half (54 percent) of U.S. respondents reported that their fall 2020 total enrollment had decreased relative to fall 2019 (see Figure 2). About a quarter (22 percent) reported that their fall 2020 total enrollment remained about the same as last fall, while 23 percent reported that their fall 2020 total enrollment increased relative to fall 2019.
- In the U.S., public associate degree colleges, also known as community colleges, were more likely to report a drop in fall 2020 enrollment (84 percent) than public (52 percent) and private (47 percent) colleges and universities awarding bachelor’s and higher degrees.

- Results from the U.K. show that total enrollment in 2020 fell in nearly a third of institutions (32 percent) relative to 2019. Less than a third (29 percent) reported that enrollment had stayed the same, while 39 percent stated that their enrollment had increased.

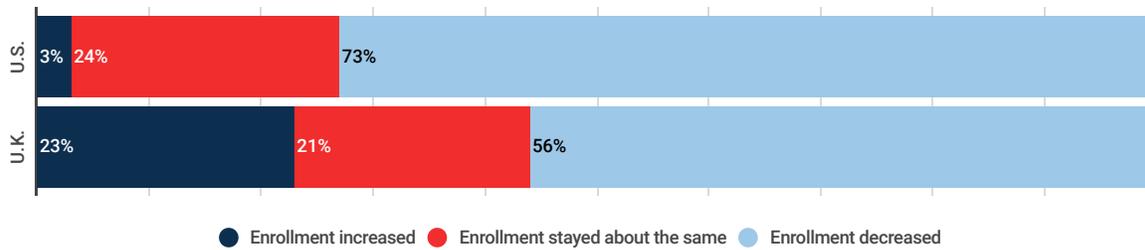
Figure 2. Total Fall 2020 Enrollment Relative to Fall 2019 Enrollment in the U.S. and the U.K.



Relative to their U.K. counterparts, institutions in the U.S. were more likely to report a decrease in international student enrollment in fall 2020. Declines were also steeper in the U.S. than in the U.K.; however, few institutions in either country saw a decrease of more than 30 percent.

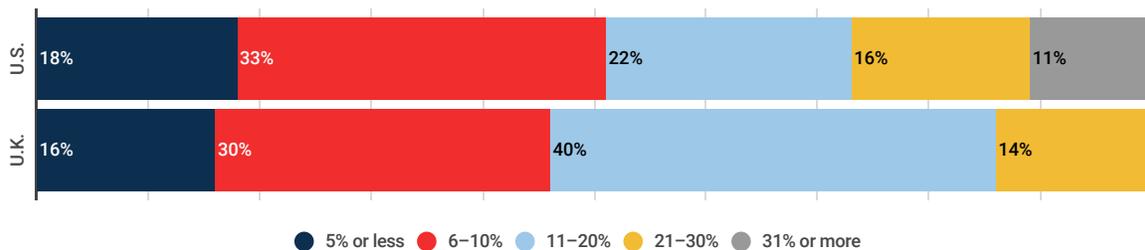
- More than 70 percent of U.S. respondents reported an overall decrease in international student enrollment in fall 2020 compared with the response from the U.K., where 56 percent reported a decrease.
- A larger discrepancy can be found in institutions reporting international student enrollment *increases* in 2020 relative to 2019. Only 3 percent of U.S. respondents reported an increase in these enrollment numbers, compared with 23 percent of U.K. respondents.

Figure 3. International Student Enrollment Relative to Fall 2019 in the U.S. and the U.K.



- Of the 70 percent of U.S. institutions that reported declines in international student enrollment, 18 percent saw a decrease of 5 percent or less, 55 percent saw a decrease between 6 to 20 percent, 16 percent saw a decrease between 21 to 30 percent, and 11 percent saw a decrease of more than 30 percent (see Figure 4).
- Of the 56 percent of universities in the U.K. that reported declines in international student enrollment, 16 percent saw a decrease of 5 percent or less, 70 percent saw a decrease between 6 to 20 percent, 14 percent saw a decrease between 21 to 30 percent, and none reported a decrease of more than 30 percent.

Figure 4. Fall 2020 International Student Enrollment Decline Relative to Fall 2019 in the U.S. and the U.K.



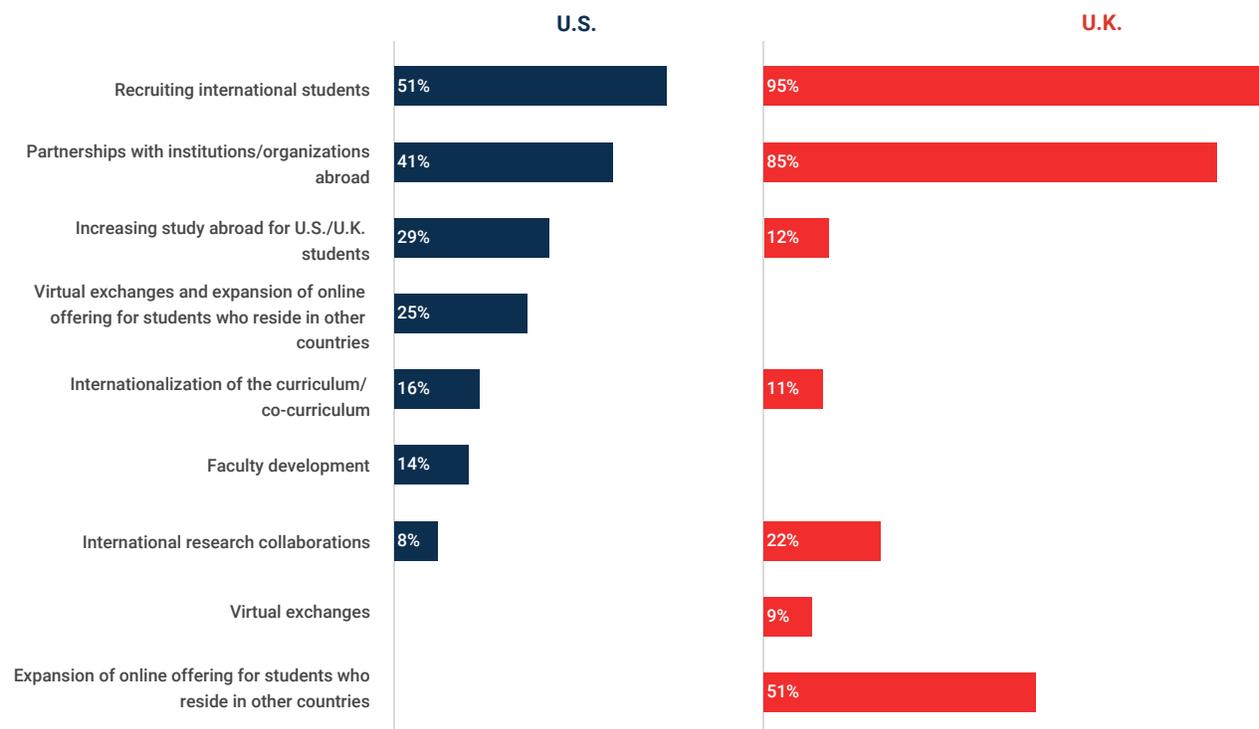
Both ACE and Universities UK International are committed to supporting colleges and universities as they recalibrate, recommit, and recommence work toward their internationalization and global engagement goals. With long-term planning and a return to normalcy in mind, two forward-looking questions were included in this survey in order to better understand how the COVID-19 pandemic is affecting institutions' internationalization strategies and priorities in the two countries.

In planning for the post-pandemic era, recruiting international students is the top internationalization priority in both countries. International research collaborations figure much more prominently in the U.K. than in the U.S.

Survey respondents were presented with a list of nine internationalization actions and asked to select *up to three* that they believe will be top priorities for their institution's internationalization strategy beyond the 2020–21 academic year (see Figure 5). *Note: Some items were reworded or asked exclusively of U.S. or U.K. institutions.*

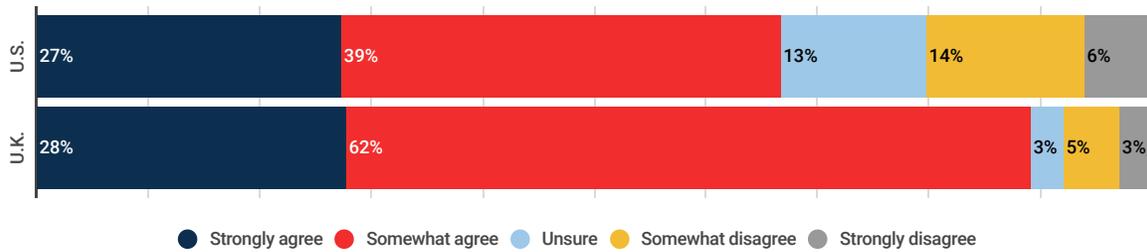
- More than half of U.S. respondents indicated that “recruiting international students” will be their institution’s top internationalization priority. This was followed by “partnerships with institutions/organizations abroad” (41 percent) and “increasing education abroad for U.S. students” (29 percent).
- Almost all of the U.K. respondents indicated that “recruiting international students” (95 percent) and “educational partnerships with institutions/organizations abroad” (85 percent) would be future priorities. Other top priorities included “expansion of online offerings for students who reside in other countries” and “international research collaboration.”

Figure 5. Long-Term Internationalization Priorities Beyond 2020–21 Academic Year in the U.S. and the U.K.



- When asked to indicate their level of agreement with the statement: “The COVID-19 pandemic will affect my institution’s long-term strategy (past the 2020–21 academic year) related to internationalization,” 66 percent of U.S. respondents and 90 percent of U.K. respondents said they “somewhat agree” or “strongly agree” (see Figure 6).

Figure 6. Level of Agreement with the Statement: “The COVID-19 pandemic will affect my institution’s long-term strategy (past the 2020–21 academic year) related to internationalization in the U.S. and the U.K.”



Note: Due to rounding, numbers may not add to 100.

In the United States, the findings from this survey already indicate a shift from internationalization data trends noted in previous iterations of the *Mapping Internationalization on U.S. Campuses* report. ACE launched the 2021 Mapping Survey in February 2021, nearly a year into the COVID-19 pandemic and amidst ongoing socioeconomic strife, and it will be interesting to see whether and how the shifts revealed here continue to evolve.