



BRITISH
BOARDING
SCHOOLS
NETWORK

The Latest Intelligence on International Boarding Markets – May 2019

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WORKSHOP



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Market intelligence has been gathered from our global network of trusted agents:

- 750+ offices globally
- Reference-checked and screened
- Attend our networking Workshops
- Profiled on our platform, Connected
- Regular contact and feedback



A brief overview of the ISC Census Data, April 2019



A light purple world map serves as the background. It is overlaid with a network of glowing yellow nodes and thin, curved yellow lines that connect them, suggesting a global network or data flow.

28,910

Total non-British pupils with parents living overseas

5.4% of the total ISC population



2.4%

The increase in the total number of non-British pupils with parents living overseas compared to last year

An increase of 685 pupils.

A stylized world map in light purple with numerous glowing yellow nodes and dashed yellow lines connecting them, representing a global network. The number 12,617 is prominently displayed in the center in a large, bold, yellow font.

12,617

The number of NEW non-British pupils at UK schools with parents living overseas.



1.2%

The increase in the number of NEW non-British pupils with parents living overseas compared to last year.


An increase of 149 pupils.




▲ **13 Markets are up**
▼ **10 are down**

Based on NEW non-British pupils with parents living overseas

Changes to NEW non-British pupils whose parents live overseas

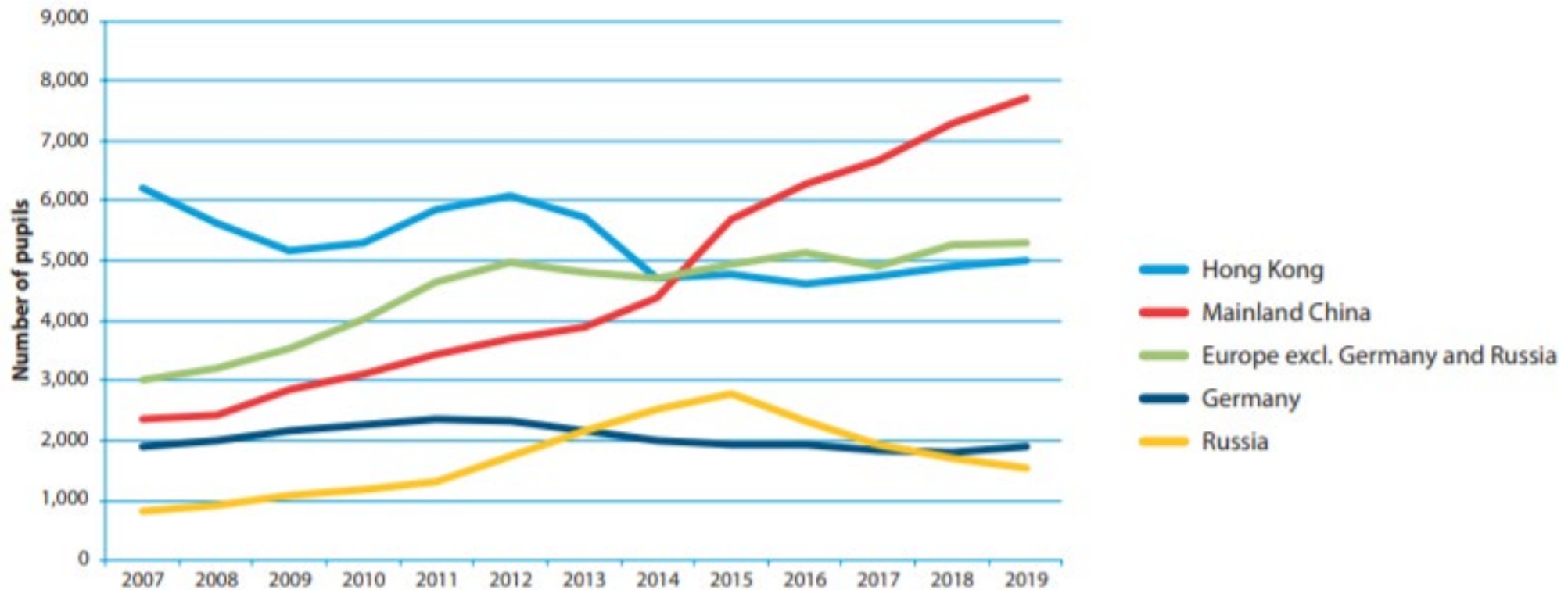
Markets which are UP 	2018	2019	% change	Change in pupil nos
Germany	1051	1181	12.4%	130
Remainder of Europe EEA	923	1021	10.6%	98
Mainland China	3209	3278	2.2%	69
Rest of Africa	236	290	22.9%	54
Nigeria	300	343	14.3%	43
Remainder of Far East	488	524	7.4%	36
Central Asia	179	206	15.1%	27
Russia	531	546	2.8%	15
Thailand	327	340	4%	13
Pakistan, Sri Lanka & Bangladesh	38	51	34.2%	13
France	200	212	6%	12
Malaysia	227	229	0.9%	2
USA	146	147	0.7%	1

Changes to NEW non-British pupils whose parents live overseas

Markets which are down 	2018	2019	% change	Change in pupil nos
Middle East	442	283	-36%	-159
Hong Kong	1756	1676	-4.6%	-80
Spain	981	928	-5.4%	-53
Central and South America	318	291	-8.5%	-27
Oceania	58	43	-25.9%	-15
Rest of North America	54	40	-25.9%	-14
Ireland	30	23	23.3%	-7
Remainder of Europe non-EEA	443	439	-0.9%	-4
Taiwan	78	75	-3.8%	-3
South Korea	194	192	-1%	-2

Be aware of the long term trends

Fig 21. Number of non-British pupils whose parents live overseas from selected countries at ISC schools: 2007-2019



What do the Agents say?



GERMANY – What do agents say?

“The ISC data does reflect the upturn in demand we have seen. We are up 20% on last year.”

“It does reflect our numbers for last year but recruitment for the academic year 2019 /2020 is stagnating and it is trying times for us.”

“Demand is robust and our strongest demand is still for shorter periods of time, mainly from 15-year-old students, looking for experiential stays of 3 to 6 months.”

“We had an increase of 15% in placements from Germany between sept 18 and April 19. The outlook is positive despite Brexit.”

“We have not experienced the level of upturn which the census has shown.”

GERMANY – What do agents say?

“I think much of the recovery in the German market for students starting in the academic year 18-19 was simply due to a “market correction” after the “shock” of the Brexit vote a few years ago. We had far fewer enquires in the academic year immediately following the Brexit vote than we would normally expect from Germany, but now things are much more as we would expect in terms of volume of enquiries again.”

“Germany remains price-sensitive to the school fee increases each year. A limit of 2% increase per year please!”

“Affordability is key and that my clients are also looking at the Irish market more and more. The leaving cert is equivalent to the Abitur and gives students access to any university course at our state universities in Germany.”

GERMANY – What do agents say?

“We have many conversations with families about Brexit still. Bottom line is though that we can mostly reassure them that the worst case is some form of visa arrangement.”

“Many German federal states have re-introduced a 9-year model in secondary school education after having gone down to 8 years at the end of the last decade. This slightly facilitates students going away for experiential school stays abroad.”

“We have more students deciding to go to school in England without respecting the German qualifications: that means more BTEC students this year or choosing subjects that are not qualified here in Germany. More open to study at a private university in Europe, in Germany as well, where qualifications are differently handled than the state universities do it.”

SPAIN – What do agents say?

“Yes, definitely a decline in the Spanish market. Parents are worried about Brexit and are sending their children to the USA.”

“I have noticed a decrease in full academic year programmes as I think some families are looking at other destinations. We have seen an increase in shorter term or one term stays.”

“Brexit and uncertainty in Spain about political issues is influencing parents’ decisions. I expect demand to remain stable rather than to increase for the next academic year.”

FRANCE – What do agents say?

“The demand and expectations remain the same, although I have seen an increase in short-term requests (half a term and even less).”

“The outlook is healthy, but fees are becoming very hard for many families. Travel arrangements, extra expenses and organization for exeat weekends are not helping.”

NETHERLANDS – What do agents say?

“We have developing demand in our country by offering short term immersion programmes as families are not familiar with the UK system.”

“Dutch universities are teaching more in English so there is potential to develop the market for British boarding.”

“IB schools for the 6th form remain the most popular option.”

“The low £ is helping.”

RUSSIA – What do agents say?

“There seems to be a slight increase in applications. Slow recovery.”

“The Russian economy is still weak, but parents are starting to look towards UK boarding again.”

“Single sex schools are still regarded with some suspicion, and the number of Chinese students is viewed negatively.”

UKRAINE – What do agents say?

“The number of UK visas issued to Ukrainians has reached historical top of the charts in 2018; +21% compared to 2017.”

- Student visas (short term students) also grew; +15% in 2018 compared to 2017
- General refusal rate is low; down to 10% which is the lowest since 2013.
- No growth in the Tier 4 Child visas but not hasn't dropped.

“We remain optimistic about the Ukrainian market and continue to work to promote British education.”
Business Link, Ukraine

What do the Agents say?



KAZAKHSTAN – What do agents say?

“The ISC data shows the Central Asia region is up. Unfortunately we can’t say the same for our own experience. This year we have less requirements for British boarding but much more to USA and Canadian schools. We suppose it’s happened because families don’t see any opportunity to have work experience after education.

We love British schools but it’s become difficult to recruit students without clear opportunities after university.”

What do the Agents say?



CHINA – What do agents say?

“We see a continued picture of steady growth in the market for inbound Chinese students.”

“I would have expected the increase in the ISC data to be higher based on our experience.”

“The UK remains a popular destination. Safety (and Trump) are serious concerns for the US but Australia is a cheaper option. ”

“Data shows that demand for the US has decreased by 5-15% in last two years. Parents think UK is safer and the trade war with the USA is not helping.”

CHINA – What do agents say?

“There has been a huge growth in domestic international education in the last few years in China. However this has not really impacted the demand for overseas British Boarding based education since:

- There are very few foreigners at these schools meaning the language outside class is still Chinese and therefore progress in English is slow
- It is hard to recruit enough native English-speaking teachers so the quality of English is often poor
- The cost of these schools is the same as in the UK”

“There is a wider understanding that the best way to get into a top school at 13+ is to study at a prep school beforehand; this has continued the trend of students getting younger and younger. In addition, more mothers are coming over with children under 12 and studying at day schools with Tier 4 sponsorship. ”

HONG KONG – What do agents say?

“I’m pessimistic for 2019/20 onwards. It’s now much easier for pupils taking the Hong Kong Diploma of Secondary Education to win a place at a Hong Kong university. Many pupils went to the UK for their A Levels, as they feared they would not gain a pass at HKDSE Chinese and/or Liberal Studies. Hong Kong universities now just look at the total HKDSE grades, so pupils do not have to pass Chinese and Liberal Studies. Hong Kong schools are also starting to limit the amount of homework and to improve the pastoral care. This will decrease demand for the UK.”

“The ISC shows a 4.6% decline; we are 10% down on last year. I expect the market to further decline.”

HONG KONG – What do agents say?

“Birth rate is the major issue; with SARS hitting HK in 2003, the birth rate in 2004 dropped more than 25%. This affects the current 14 – 16 year olds.”



HONG KONG – What do agents say?

“HK families are very aware that British schools are looking more and more to Mainland China and when they look at the breakdown of a school’s boarding community and see a high percentage of pupils from the Mainland this most certainly has an effect on their choice.”

“More renowned British schools are opening in HK so families have that option. If they don’t get their first choice of UK schools they can stay in HK and access the British schools there.”

“Some of my students have chosen to do a 1 year University foundation programme instead of 6th form”

THAILAND – What do agents say?

“The latest census indicates a 4% increase which is an accurate reflection from our perspective.”

“We’ve seen an increase in the number of enquiries for British boarding which stems, in part, from the rise in international schooling options in Thailand. Families are wanting to compare prices and weigh up the advantages/disadvantages of enrolling their child in a British curriculum school locally (that has a direct connection or link with the UK) versus direct enrolment in a British Boarding School.

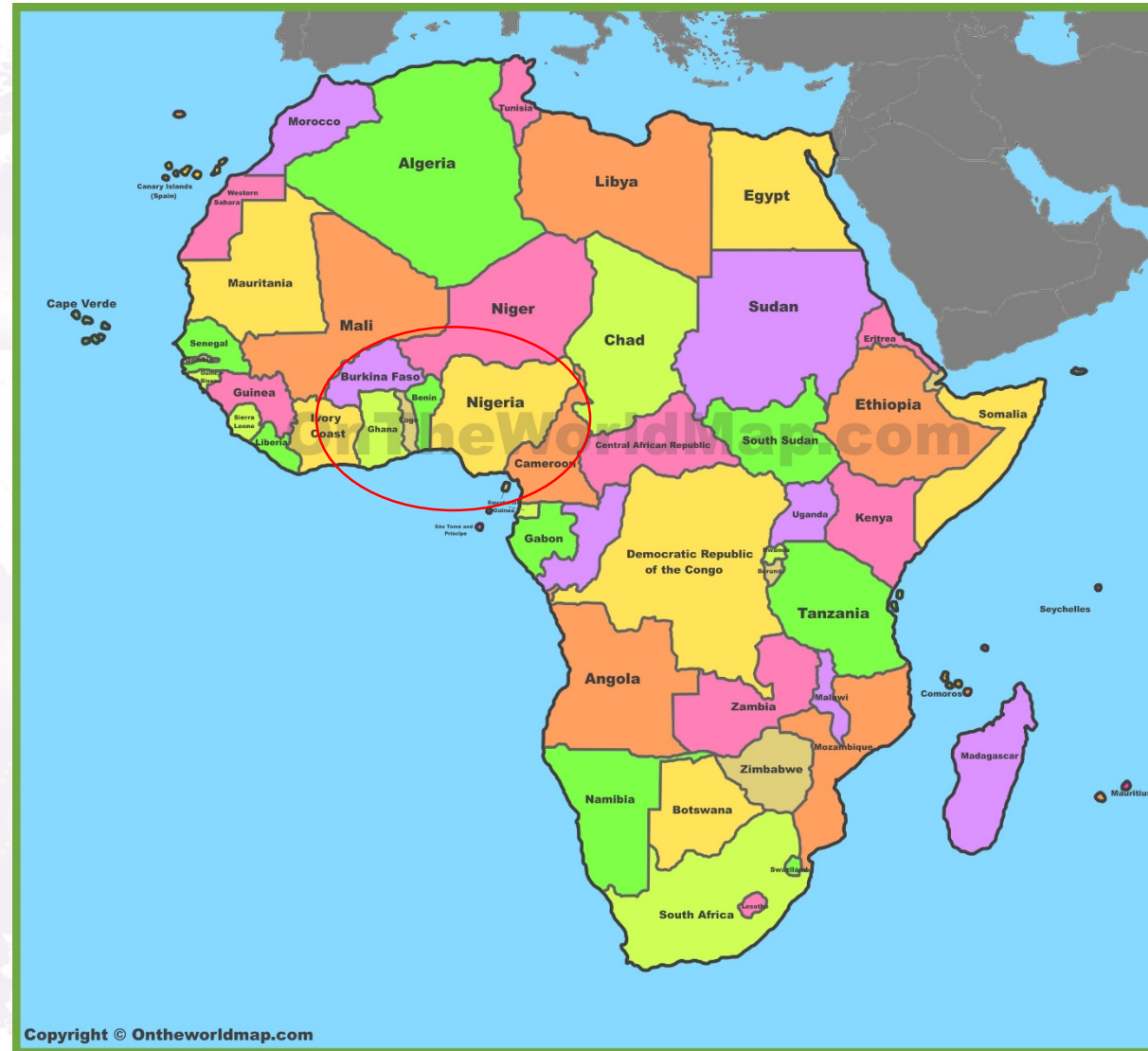
The strengthened Thai Baht against the £ has made British Boarding more appealing. The ‘value for money’ belief has also remained in terms of what’s on offer from a British Boarding School education.”

VIETNAM – What do agents say?

“Demand is increasing. The middle class here is getting bigger every month and there is more disposable income than ever before to be spent on education. A western style education for their children is the ultimate goal for Vietnamese parents and whilst the UK is a second market for them after the US (and Australia), demand is growing by the day.

Our agency has seen a sharp increase in students choosing the UK as a study destination and although that is very much anecdotal, I do believe it represents the wider market here. Vietnam remains – for now – a price sensitive market, so most parents choose to place their children in schools at first year GCSE or A-Level to save on costs whilst looking to subsidize this with substantial scholarships. There remains competition domestically, however, with international schools no longer being capped at the number of local students they can enroll. “

What do the Agents say?



NIGERIA – What do agents say?

“The Nigeria market remains steady and I expect this to continue unless the Nigeria govt impose controls on overseas payments. For the well off families there is a tradition of sending their children to the UK. It is still seen as an aspiration by those who can afford it. However the increasing current costs are no longer affordable for the upper middle classes who could have stretched to a UK education 8 years ago.”

“Nigeria is a market of extremes, it is either very tough, or buoyant. It was difficult a few years ago because of the financial crisis, changes in political leadership, difficulties in transferring money for school fees, challenging exchange rates. As predicted last year, these times are now past and more families are sending their children overseas than ever before. Not just to ‘big name’ schools but good schools across the UK. There is stability politically and economically because Buhari was re-elected in February for a second term of four years.”

NIGERIA – What do agents say?

“More students are going to Canada and North America than before, for some schools it can be up to 50% of the leavers. This is because visas are more favourable and students can remain in country and work for a short period.”

“Fierce competition with local 6th form Schools who produce good A level results and offer fast track programs for progression to top UK Universities.”



GHANA – What do agents say?

“Demand for study abroad is surging among Ghanaian students. It is an important emerging African market that is increasingly on the radar of international student recruiters.” ICEF Monitor, August 2018

“According to the IMF, Ghana is one of the world’s fastest growing economies, as a result of the discovery of vast off shore oil deposits within the last 10 years.”

“We are running our first event in Ghana on 18/19 May.” *Mark Brooks Education and Anderson Education*

What do the Agents say?



MEXICO – What do agents say?

“In the past years I have seen an increase for British schools by 30%”

“Demand for the UK is increasing because:

- Canadian Boarding Schools have too many Mexicans (often more than 10% of boarding)
- The peso remains low to the US dollar making US schools very expensive in comparison to Canada and UK.
- Brexit has decreased the £ value making UK boarding affordable.
- Majority of students study abroad for only one year so going to the UK is desirable when packaged with a school and or guardian that offers trips/travel. Mexican families want a complete experience.
- Trump!”

What does all this mean for you?

- Have a clear, well-informed international strategy that is not 'scatter-gun'
- Factors affecting demand in each market can change regularly
- Ensure you have access to a reliable source of market intelligence to inform decisions and strategy



What does all this mean for schools?

- Have a strong team of agents who know your school
- Two way communication with agents.
- **Agents need info RIGHT NOW on availability of places for September.**



Want to know more?



BRITISH
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CONNECTED

Connected Member Networking Events

We are delighted to invite you to our new networking events, exclusively for Connected member schools and agents. These will take place in June 2019 at the following venues:

- **Tuesday 4th June - Kent College Pembury, near Tunbridge Wells, Kent**
- **Thursday 6th June - Wrekin College, Wellington, Shropshire**
- **Thursday 13th June - Pocklington School near York, East Riding of Yorkshire**

We are inviting staff in member schools who are responsible for international marketing/ admissions/ recruitment to join us for a valuable day not to be missed!

Limited places at each venue, allocated on a first-come-first-served basis.

[Book here](#)

Benefits of attending

1. A valuable opportunity to meet face to face with some Connected member educational agents who recruit from a range of markets. There will be networking opportunities over refreshments on arrival, during lunch and afternoon refreshments. We will circulate delegate lists prior to the event so that you can make contact and ensure you meet who you want to on the day.

Itinerary

- 10am – arrival and an opportunity for school and agent delegates to network, catch up with existing partners and meet new ones. Refreshments will be available.
- 11am – Tours of the school for agents.