



The Growth of the Membership of Independent Schools

According to the 2016 Independent Schools Council (ISC) census, there are currently 27,633 non-British students, whose parents live overseas, in independent British schools. This represents just over 5% of the total ISC pupil population in 2016 and 39% of the boarding sector. A further 19,752 international students, whose parents live in the UK attend independent schools in the UK. These numbers have been growing at a rate of around 5% every year over the last five years and highlight the attraction of a British boarding school education to a global market.

From these students, 55% are in Years 12 and 13, with 43% in Years 7 to 11 and 2% in Year 6 and below and there is no significant gender difference reported in these statistics. Key source markets have historically included (in order of importance) Hong Kong, China, Germany, Russia, Spain, other EU countries, other Far Eastern countries and Nigeria.

With the exception of Hong Kong, for which there are clear reasons for declining numbers (the falling birth rate and the fact that fewer civil servants can claim an education allowance for their children), numbers of international students in UK boarding schools coming from each of these source markets have increased significantly over the last few years. The main growth is in Russia and mainland China. However, there has also been significant growth in children coming to UK boarding schools from Europe, particularly Germany and Spain.

Despite economic problems in some countries and increasing competition from Australia and the US, not helped by the complexities of the UKVI visa system, most indications are that the market will continue to grow. In making this assessment, it is necessary to consider the particular drivers in specific markets.

The middle class in countries without good educational infrastructure continues to grow. This segment is increasingly demanding a quality, Anglophone education for their children. This has accounted for the enormous growth in demand for a British boarding school education in China and Russia over the last two decades, as well as the signs of growth in the Mexican market. The European markets grow as a result of dissatisfaction in Germany, France, Italy and Spain with their educational systems, which are seen as narrowly academic without the emphasis on extra-curricular activities found in UK boarding schools. As the economic environment in Spain and Italy has worsened, numbers of children coming to UK boarding schools have increased. This may seem counter-intuitive, but parents realise that their children will have to face a future away from their home country if they are to prosper and, with English increasingly accepted as the world language, parents are willing to invest in their children's future.

Going to school in the UK is seen as a way to enter a UK or US university far more easily and successfully than applying directly, and UCAS figures back up this view.

At the same time as the increase in demand, there has been an increasing willingness on the part of UK boarding schools to supply this market. Many independent schools (particularly those located outside London and the South East) are dependent on enrolments from overseas markets because of

flat or declining local demand for boarding, particularly in the light of increasing fees resulting from the demand for ever better school facilities and the increasing cost of employing teachers.

One side effect of the growth in international demand for British education and the wish of UK schools to fulfil this demand is that many children are applying to enter British boarding schools without sufficient language skills to be able to cope with the mainstream. In addition, because of differences in educational systems, some students apply to join UK schools at times which are not natural joining points in our system - e.g., in Year 11.

These market trends have resulted in the emergence of a growing number of International Study Centres (ISCs), offering 'preparation-for-boarding' programmes for international students. These programmes, which typically last for one year, are oriented around intensive English language tuition, to ensure that international students are able to rapidly attain the level of Academic English skills required for successful integration into a mainstream boarding school. These programmes help international students prepare for the British education system, through academic courses, such as one year GCSE or Pre-IB programmes. International students can also experience boarding school life and prepare socially and pastorally before enrolling at a mainstream school.

In recent years, we have seen a gradual lowering in the age of international students enrolling at ISCs, with parents eager for their child to make improvements in their English at an earlier age, thereby increasing their prospects of performing well in key examinations, such as GCSEs and A Levels. The ultimate goal of course is for the international student to secure a place at a leading university. As such, the need to attend a traditional university pathway programme will be eliminated if the student has started at a younger age.

Looking forward, we expect continued growth in the number of international students coming to enrol in boarding schools in the UK's independent school sector. Whilst the market for international students attending these programmes will continue to be small, relative to the much larger university pathways segment, there is no doubt that growth will remain strong, resulting in some exciting opportunities for operators and investors alike.

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