

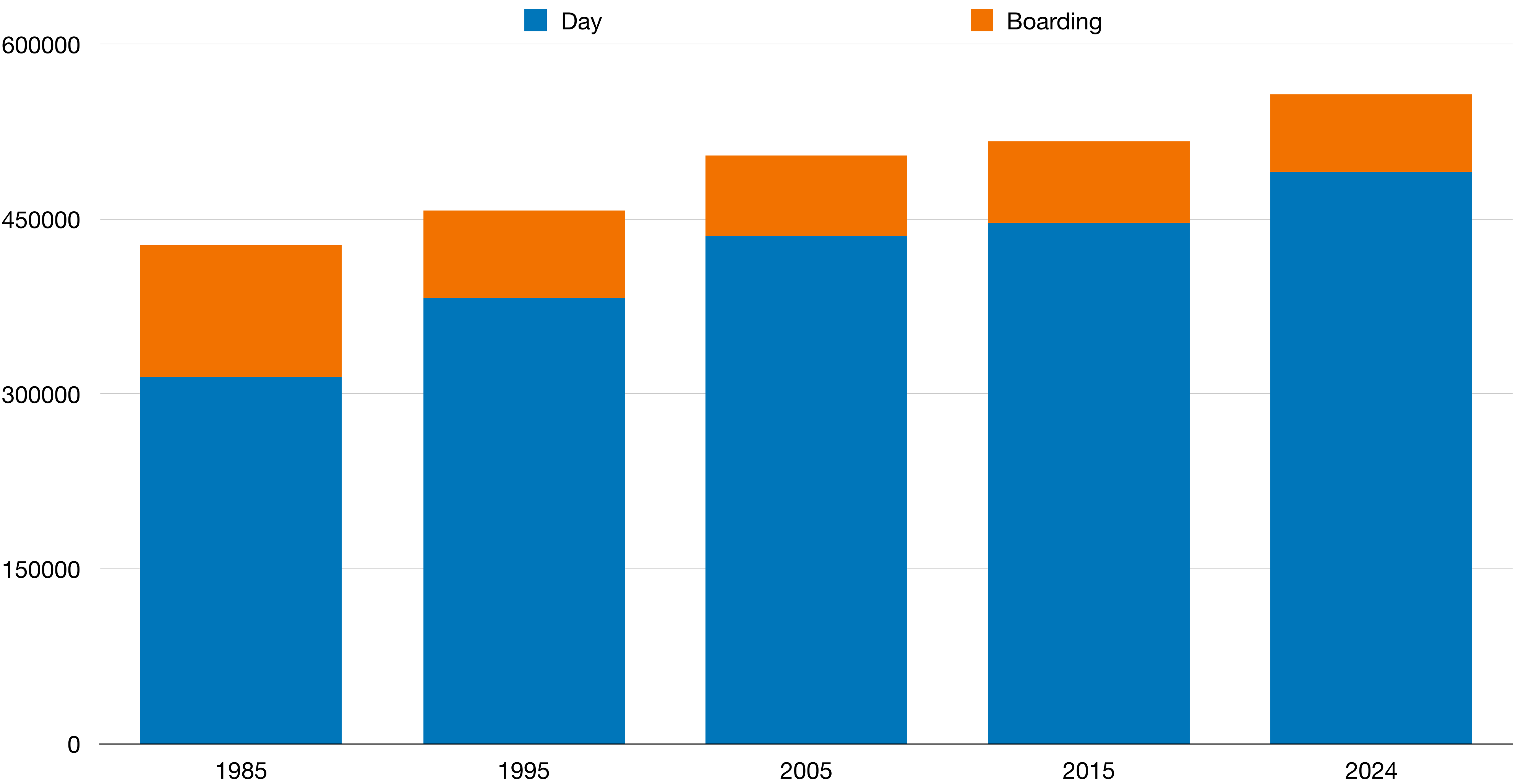
NEXT STEP EDUCATION

THE CONTEMPORARY BOARDING SCHOOL PARENT

Dr Guy Schady-Beckett, Head of Research, Next Step Education

guy@nextstepeducation.group

ISC schools | population 1985-2024

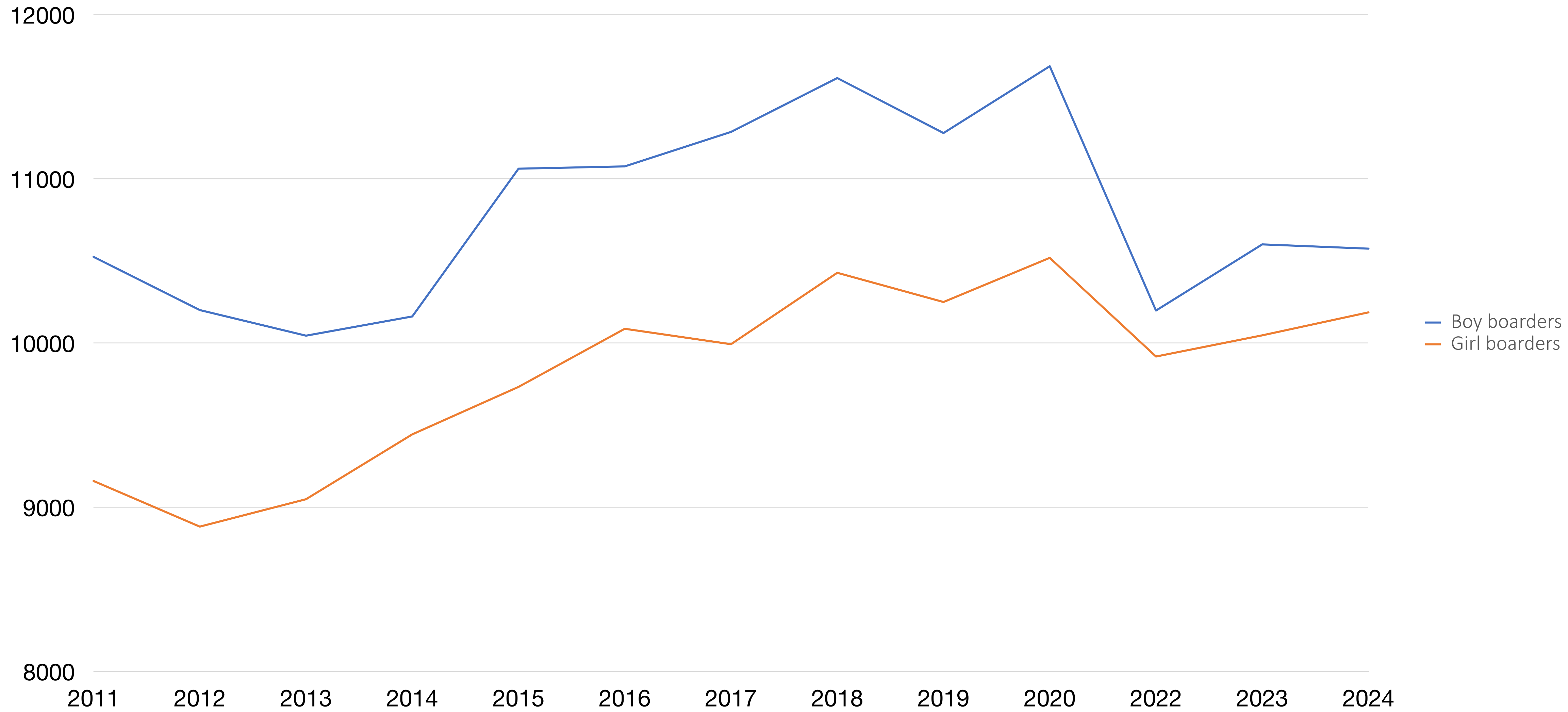


ISC schools | annual boarding fees 1985-2024

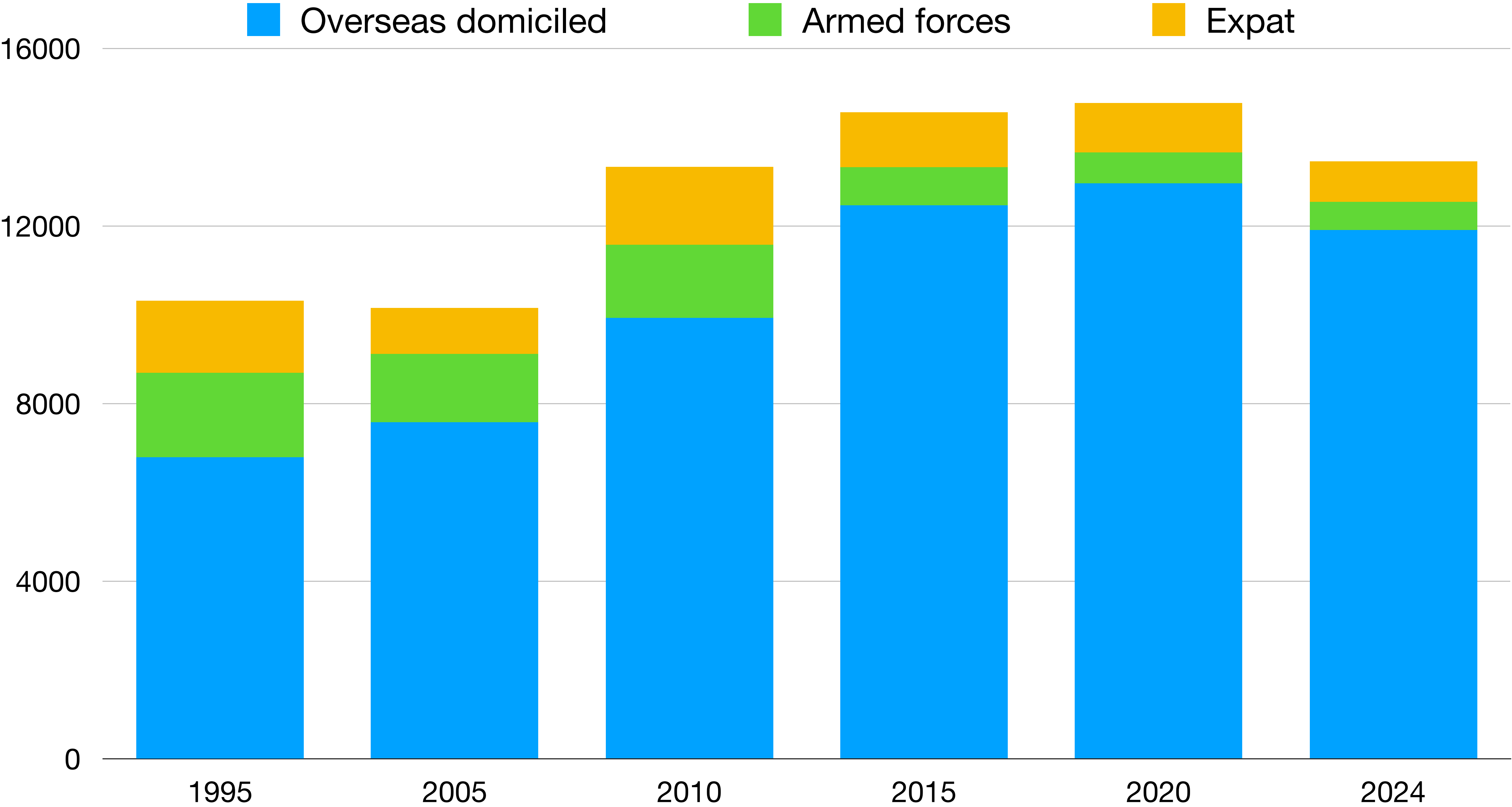
	Boys' Senior	Girls' Senior	Prep
Annual Boarding fees 1985	£2,640 - £6,075	£2,610 - £4,830	£2,190 - £4,800
Inflation adjusted*	£8,025 - £18,465	£7,932 - £14,679	£6657 - £14,589
Average 2024	Senior £41,862, Sixth £44,373		Prep £30,645

* [Bank of England Inflation Calculator](#)

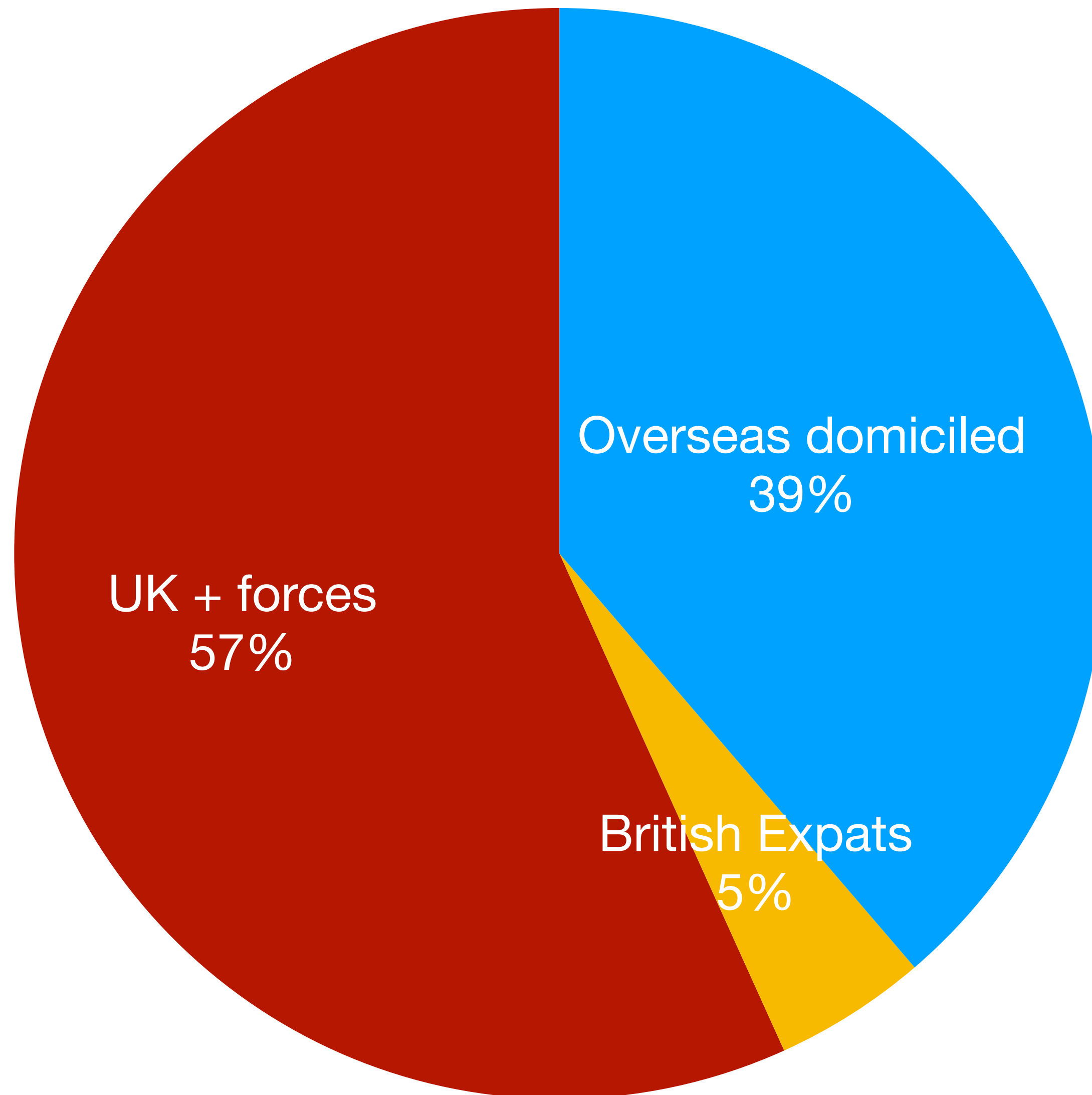
New entrants to boarding (by gender) 2011-24*



ISC schools | overseas new borders 1995-2024

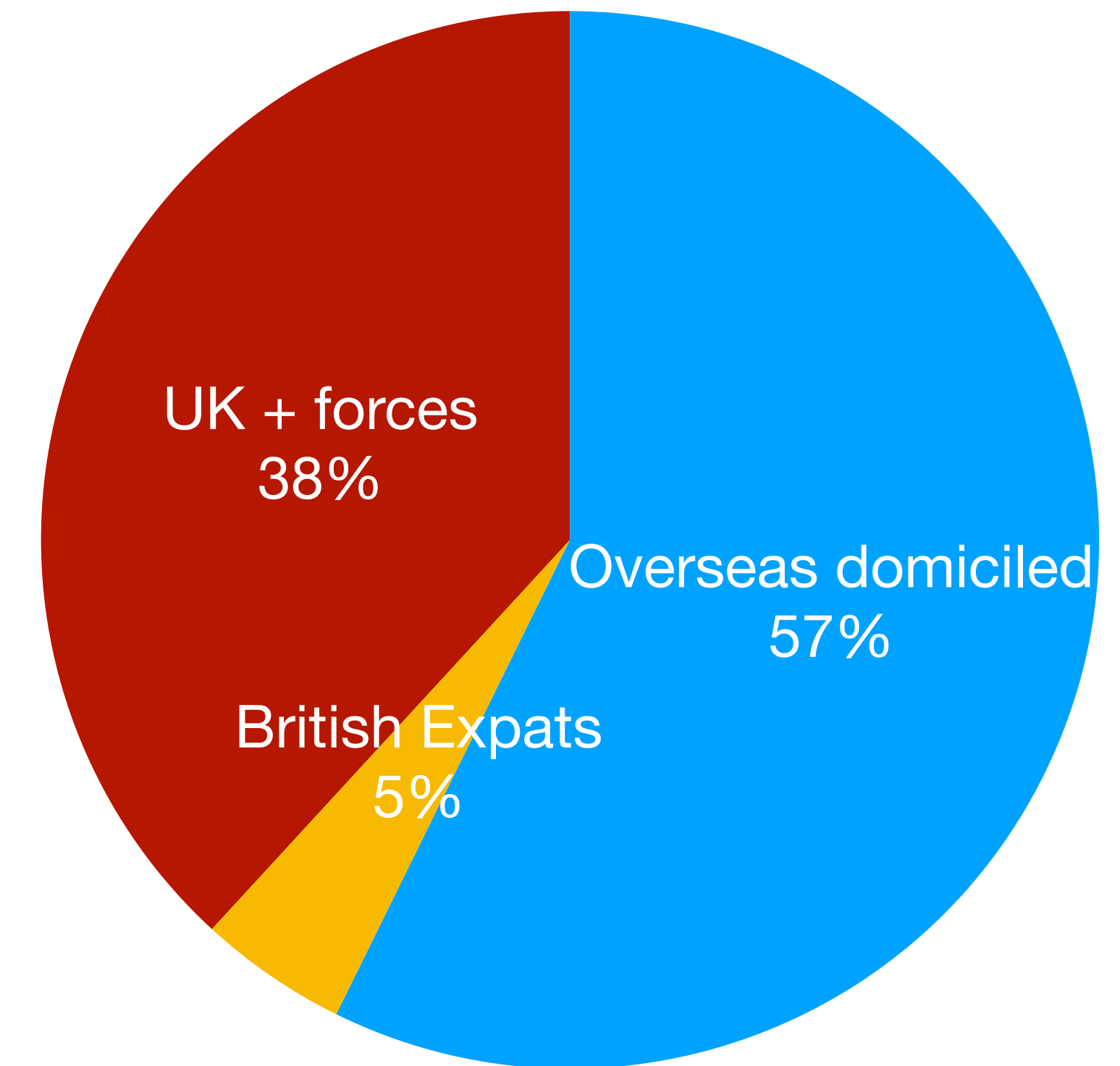


2024 Boarding Population



Total: 65,649

Boarding new joiners 2024



Total: 20,764

How long do boarders board?
by region/country

Churn Rates
Average length of stay

UK families board for the longest

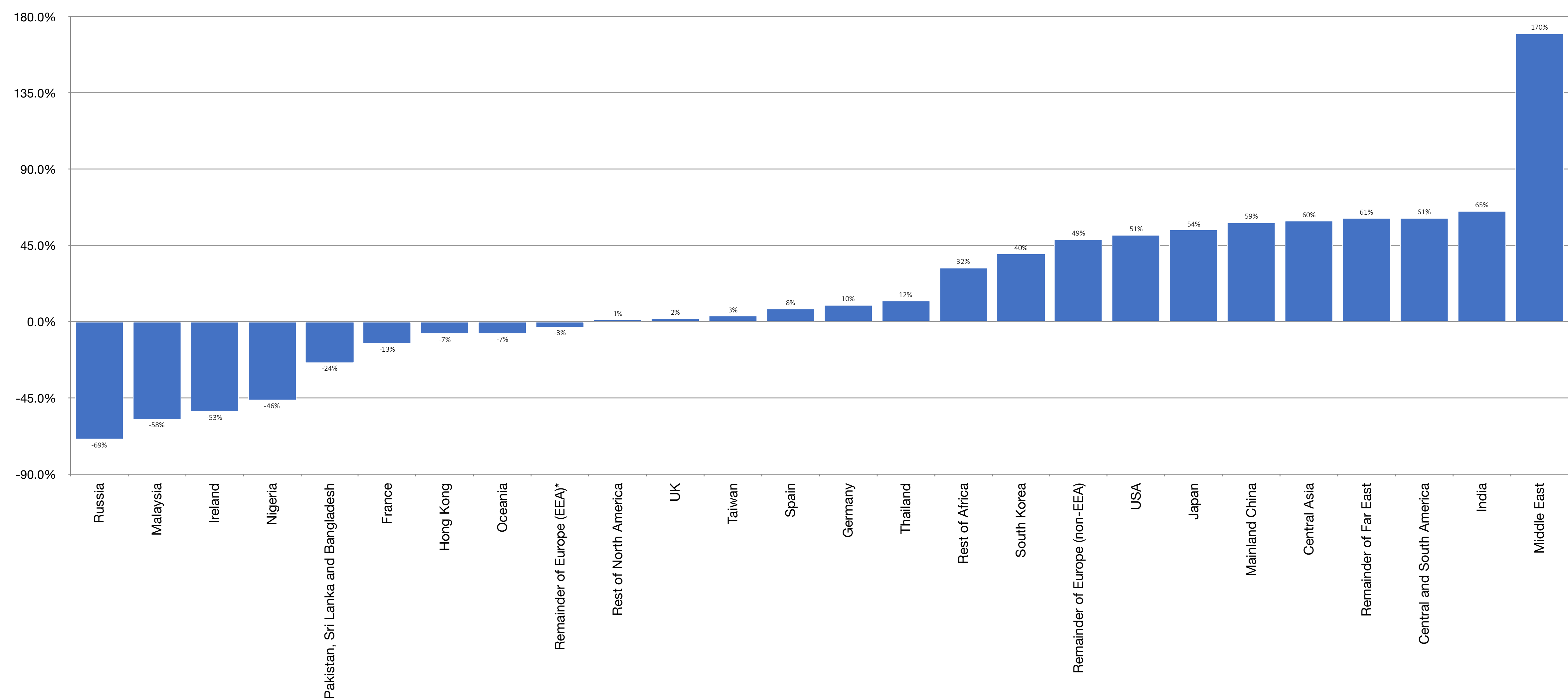
Vital for understanding student value

- a) benchmark your retention rates
- b) cost of acquisition
- c) ROI of marketing spends

Countries / Regions	2014	2018	2022	2014	2018	2022
UK domiciled + UK forces	19.6%	22.7%	22.0%	5.1	4.4	4.5
British Expats	32.4%	33.1%	31.2%	3.1	3.0	3.2
Japan	39.9%	39.2%	33.3%	2.5	2.6	3.0
South Korea	33.4%	42.0%	33.8%	3.0	2.4	3.0
Taiwan	45.7%	49.7%	34.5%	2.2	2.0	2.9
Mainland China	46.4%	44.2%	34.7%	2.2	2.3	2.9
Ireland	45.6%	32.9%	36.5%	2.2	3.0	2.7
Nigeria	45.6%	33.3%	37.8%	2.2	3.0	2.6
Hong Kong	35.8%	35.6%	37.9%	2.8	2.8	2.6
Russia	48.2%	31.6%	39.2%	2.1	3.2	2.6
Remainder of Europe (EEA)*	48.3%	41.5%	41.2%	2.1	2.4	2.4
Oceania	39.4%	45.5%	41.3%	2.5	2.2	2.4
Thailand	40.5%	38.3%	41.4%	2.5	2.6	2.4
USA	40.2%	42.7%	42.7%	2.5	2.3	2.3
Remainder of Europe (non-EEA)	44.6%	41.4%	42.9%	2.2	2.4	2.3
Remainder of Far East	38.8%	48.9%	43.3%	2.6	2.0	2.3
Rest of Africa	40.9%	43.0%	44.0%	2.4	2.3	2.3
Malaysia	43.8%	45.9%	46.8%	2.3	2.2	2.1
Central Asia	41.7%	41.6%	47.2%	2.4	2.4	2.1
India	41.6%	37.6%	47.4%	2.4	2.7	2.1
Middle East	50.7%	53.9%	50.0%	2.0	1.9	2.0
France	50.1%	49.4%	51.5%	2.0	2.0	1.9
Pakistan, Sri Lanka and Bangladesh	43.9%	48.9%	52.6%	2.3	2.0	1.9
Rest of North America	48.0%	51.7%	56.1%	2.1	1.9	1.8
Germany	61.8%	58.2%	67.4%	1.6	1.7	1.5
Spain	72.4%	69.8%	75.8%	1.4	1.4	1.3
Central and South America	72.3%	70.7%	77.4%	1.4	1.4	1.3

Proportion of boarding population made up of new entrants by country, 2014-20
Source: ISC Census 2014-20

Growth markets



2014-24 % change new entrants to UK boarding schools by country/region of domicile Source: ISC Census 2014-24

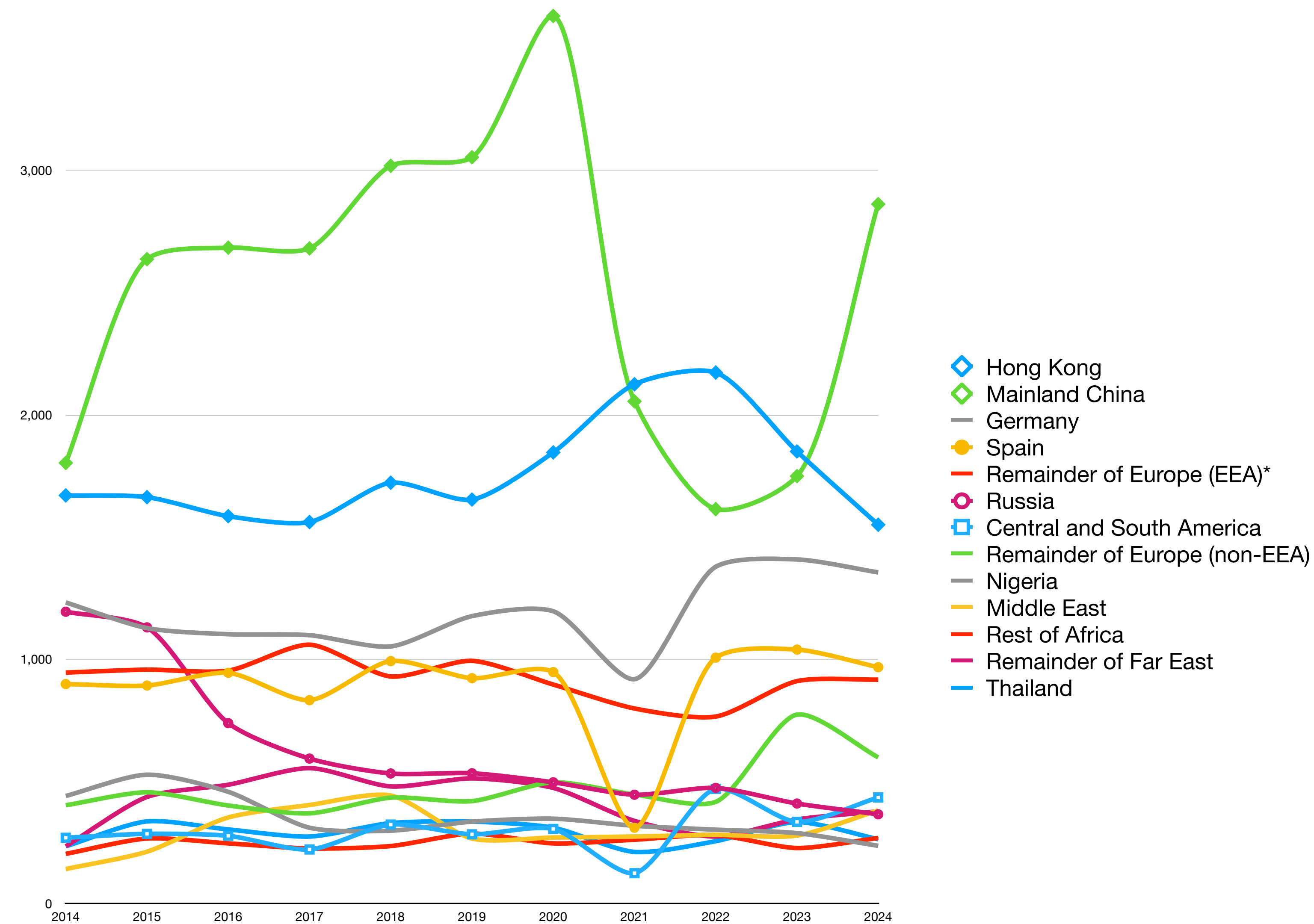
Fluctuation in global markets

Reasons for these fluctuations:

1. small samples so not surprising there are statistical variations.
2. political and economic factors (esp. instabilities / changes eg. in education policy/VISAs).
3. COVID (& other diseases)
4. patterns of clustering - see later

Other less key factors:

5. exchange rates - NB many families already have funds off-shore.
6. birth rates

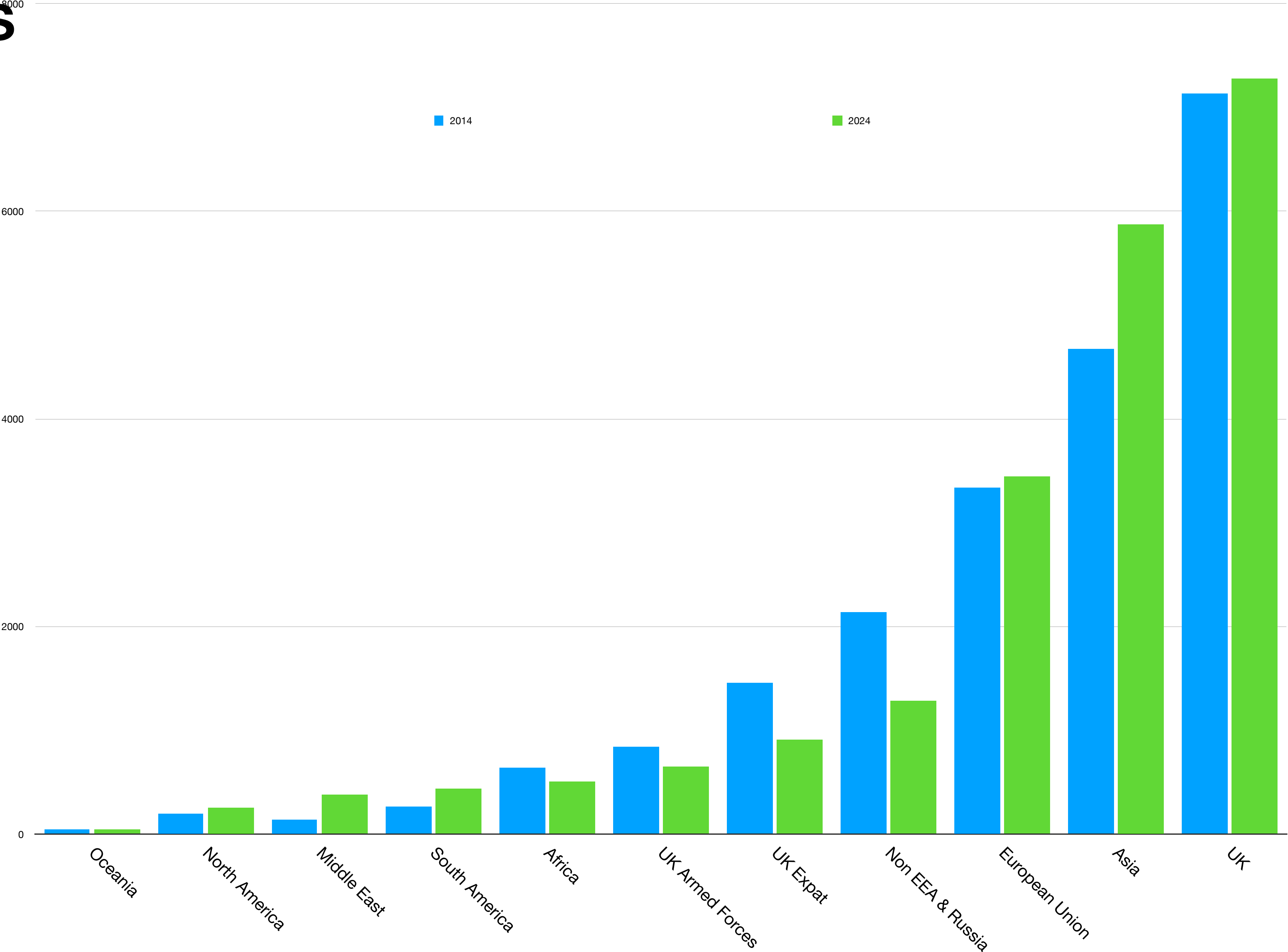


2014-24 top 13 countries providing new entrants to UK boarding schools Source: ISC Census 2014-24

Size of markets

**New entrants to UK
boarding schools by
continent of domicile +
UK parents, UK expats +
UK armed forces**

Source: ISC Census 2014-24



Market Information

- BSS & ISS End of Year Reports + exhibitor workshops + leader forums
- schoolsshow.co.uk/exhibitor
- [ISC Annual Census](#)
- [British Boarding Schools Network reports](#)
- [UBS Global Wealth Reports](#)

