

NEXT STEP EDUCATION

THE CONTEMPORARY BOARDING SCHOOL PARENT

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Independent SCHOOLS Show

Data sets since 2015

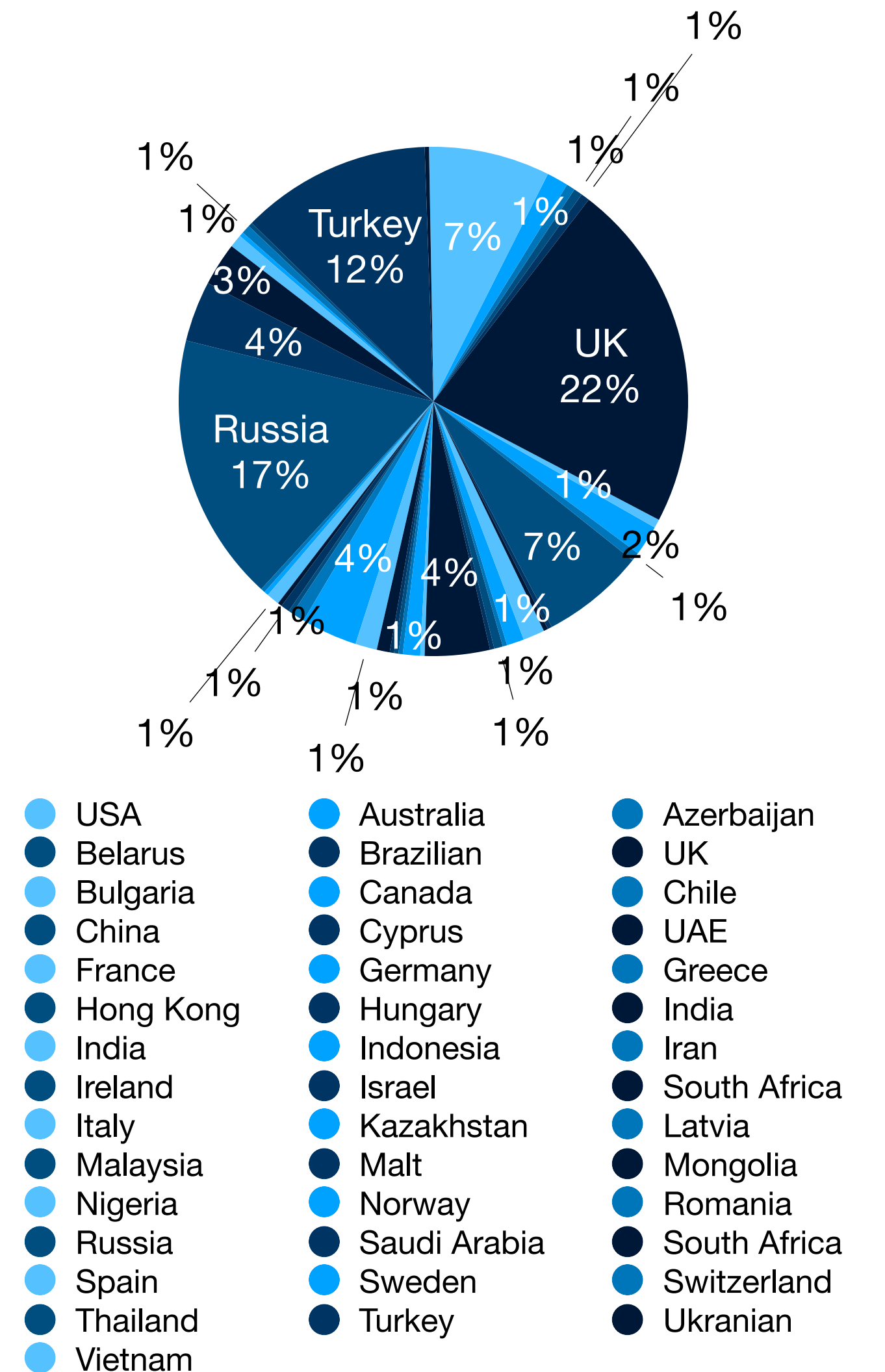
50,000+ UK and overseas families
+
talk choices
+
questions



NEXT STEP EDUCATION



BONAS MACFARLANE

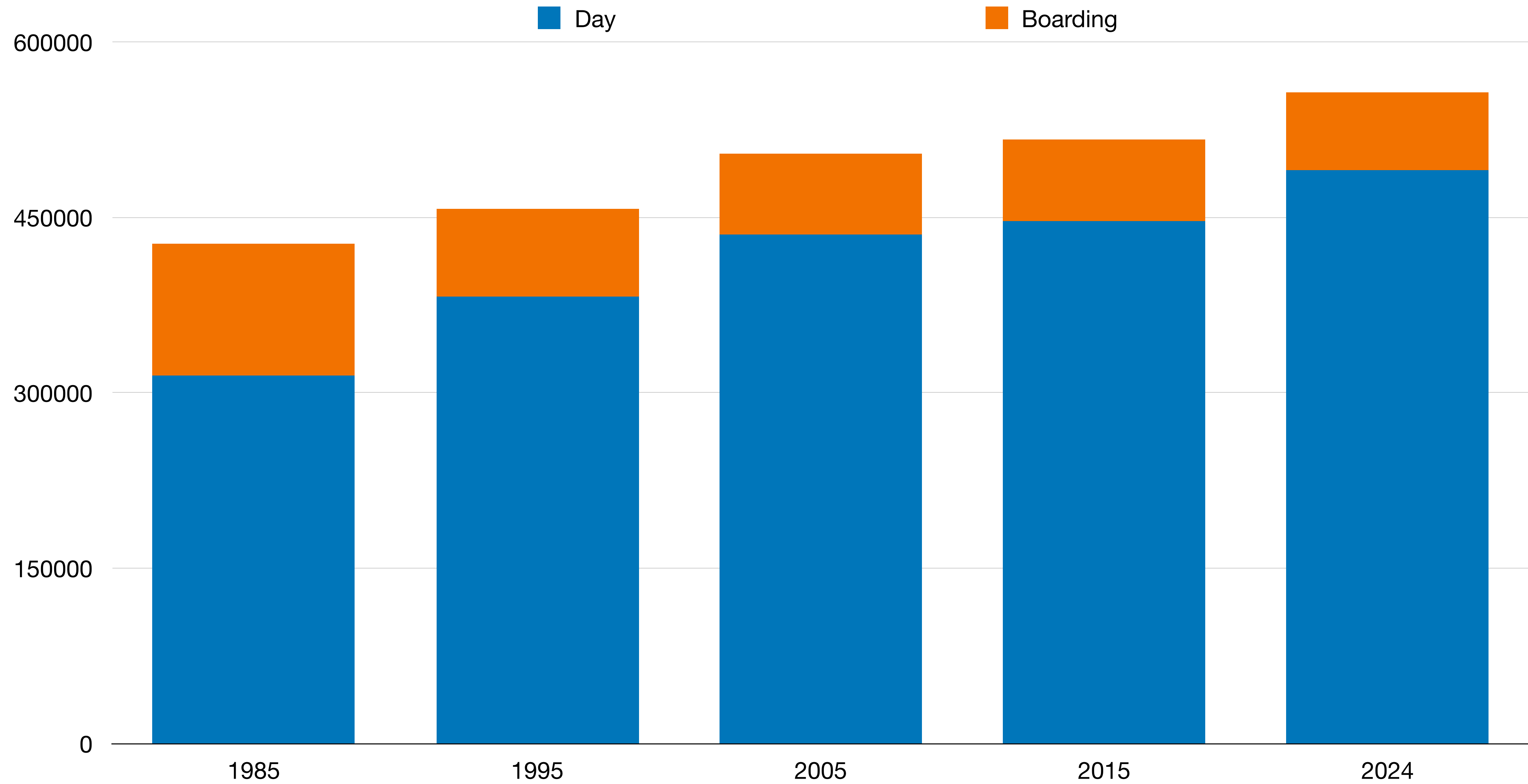


The contemporary boarding school parent

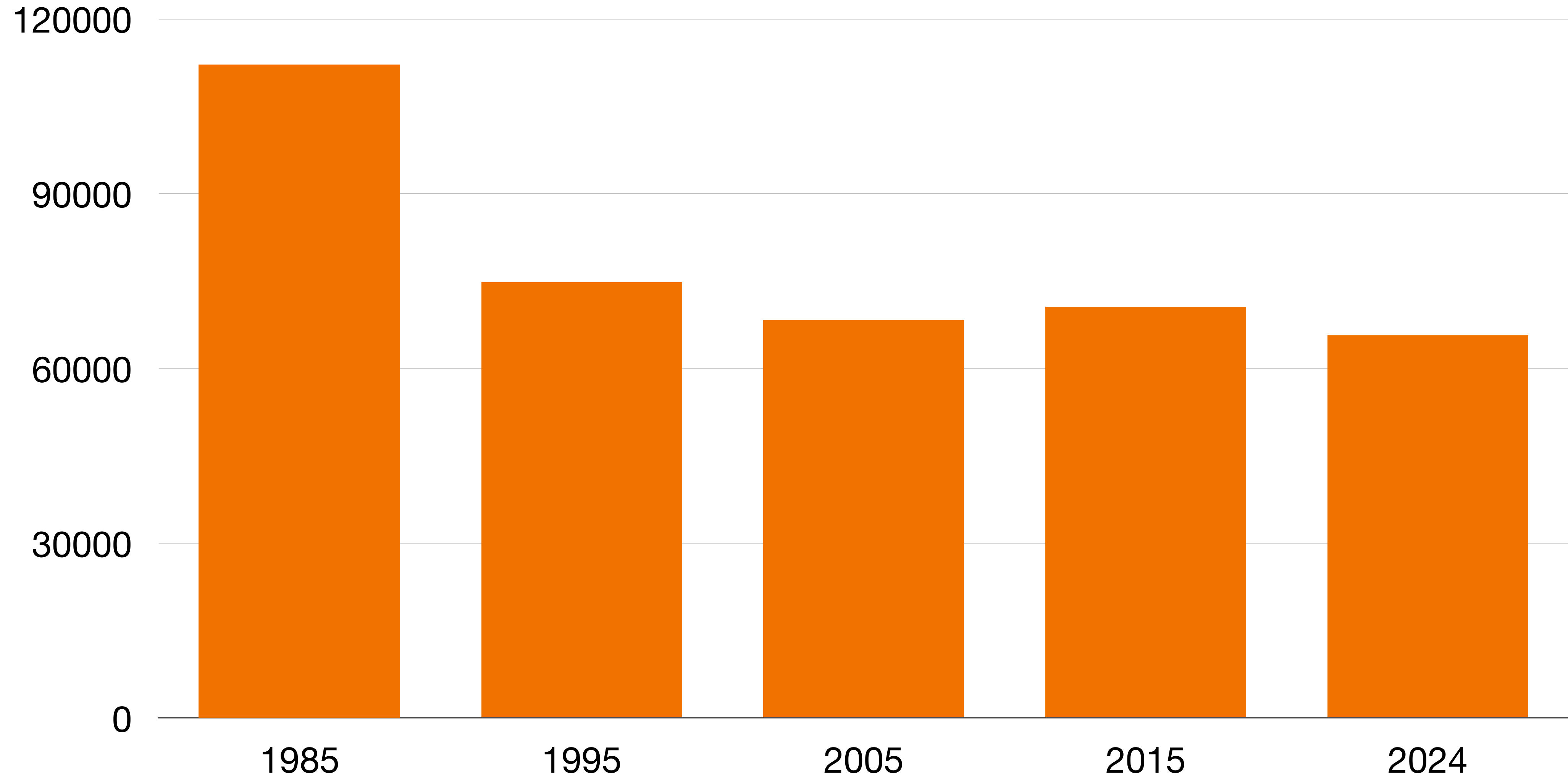
1. Some context
2. London parents
3. Overseas parents

1. Some context

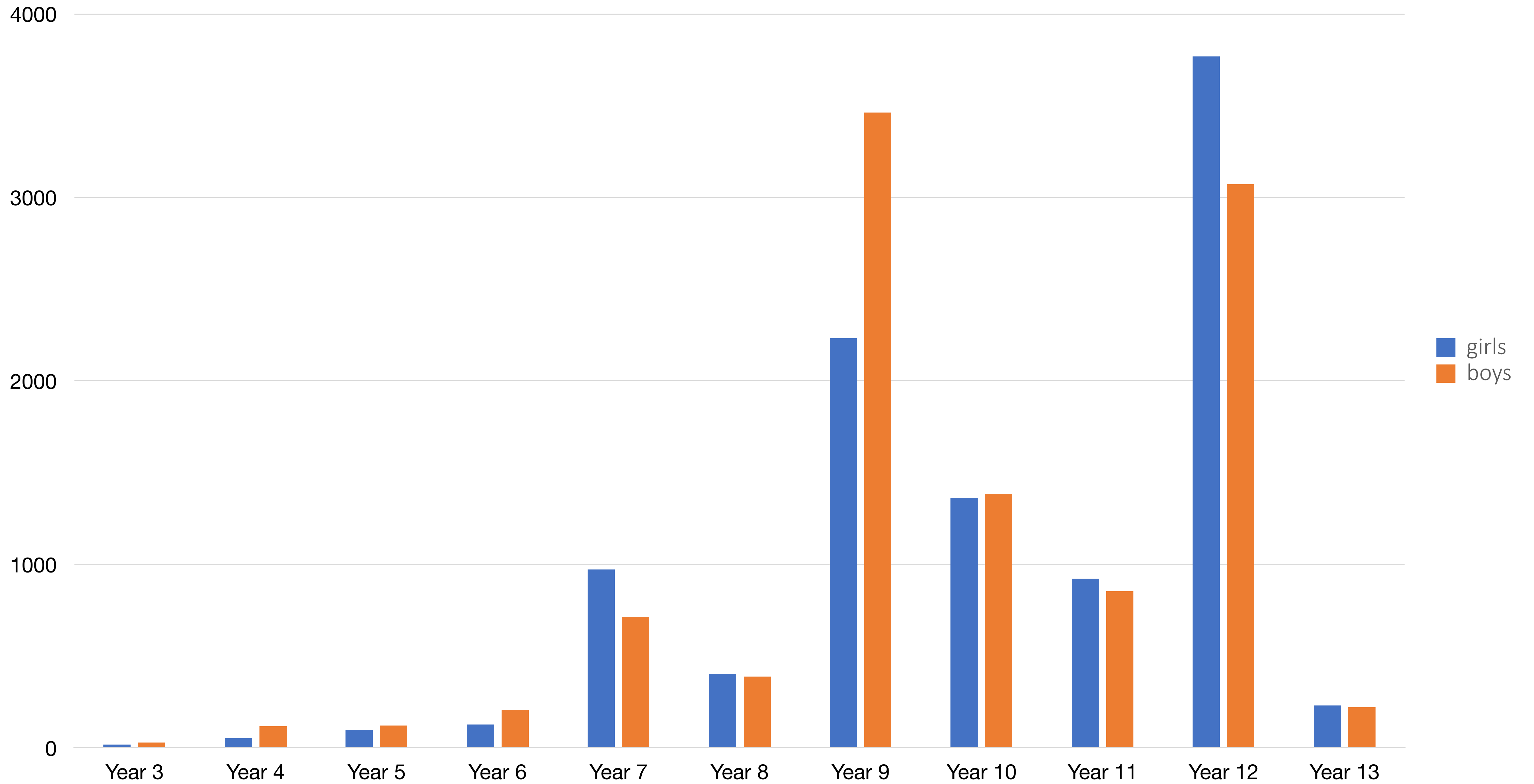
ISC schools | population 1985-2024



ISC schools | boarding population 1985-2024



Boarding entry ages (by gender) 2024

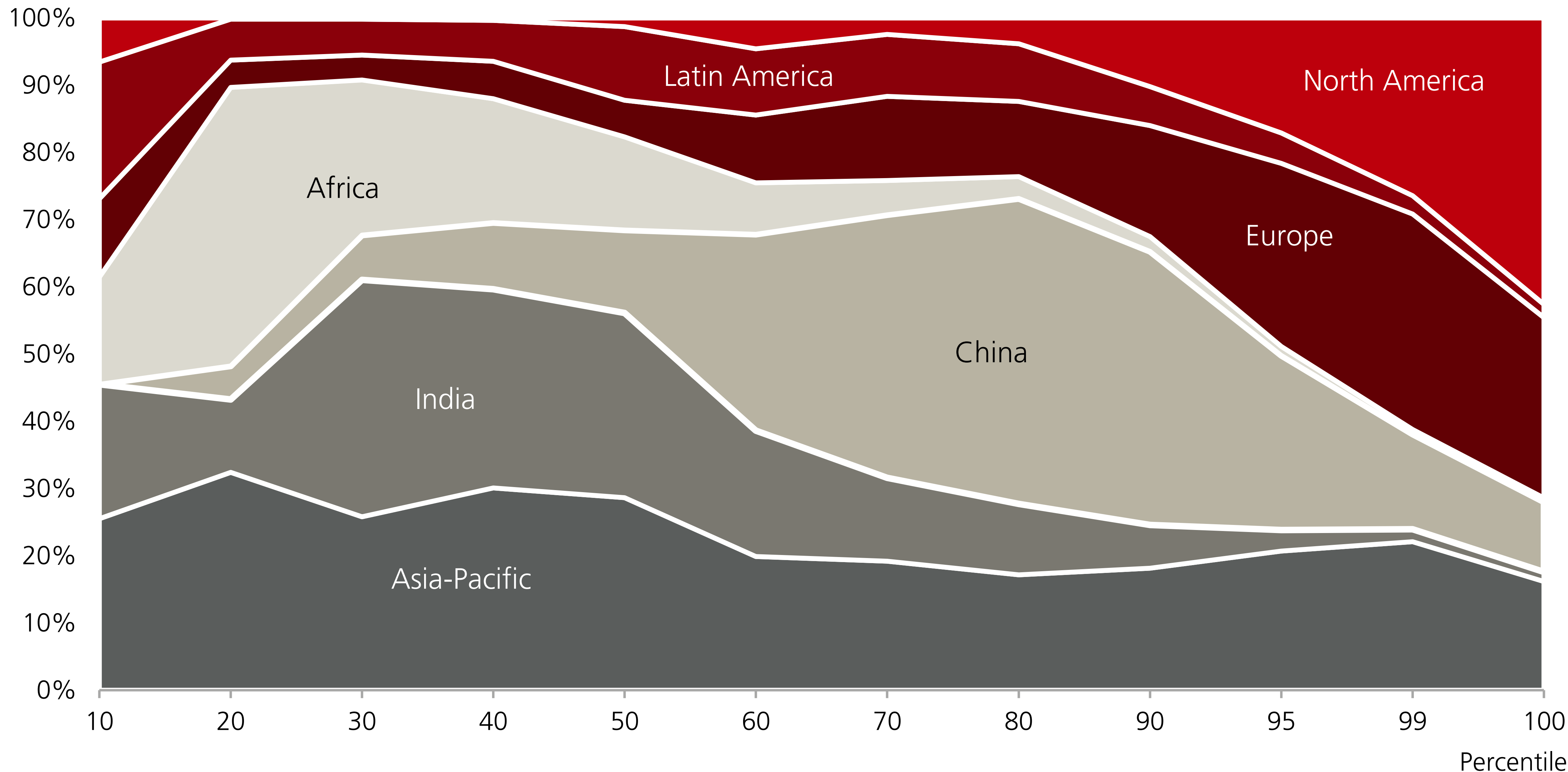


ISC schools | annual boarding fees 1985-2024

	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

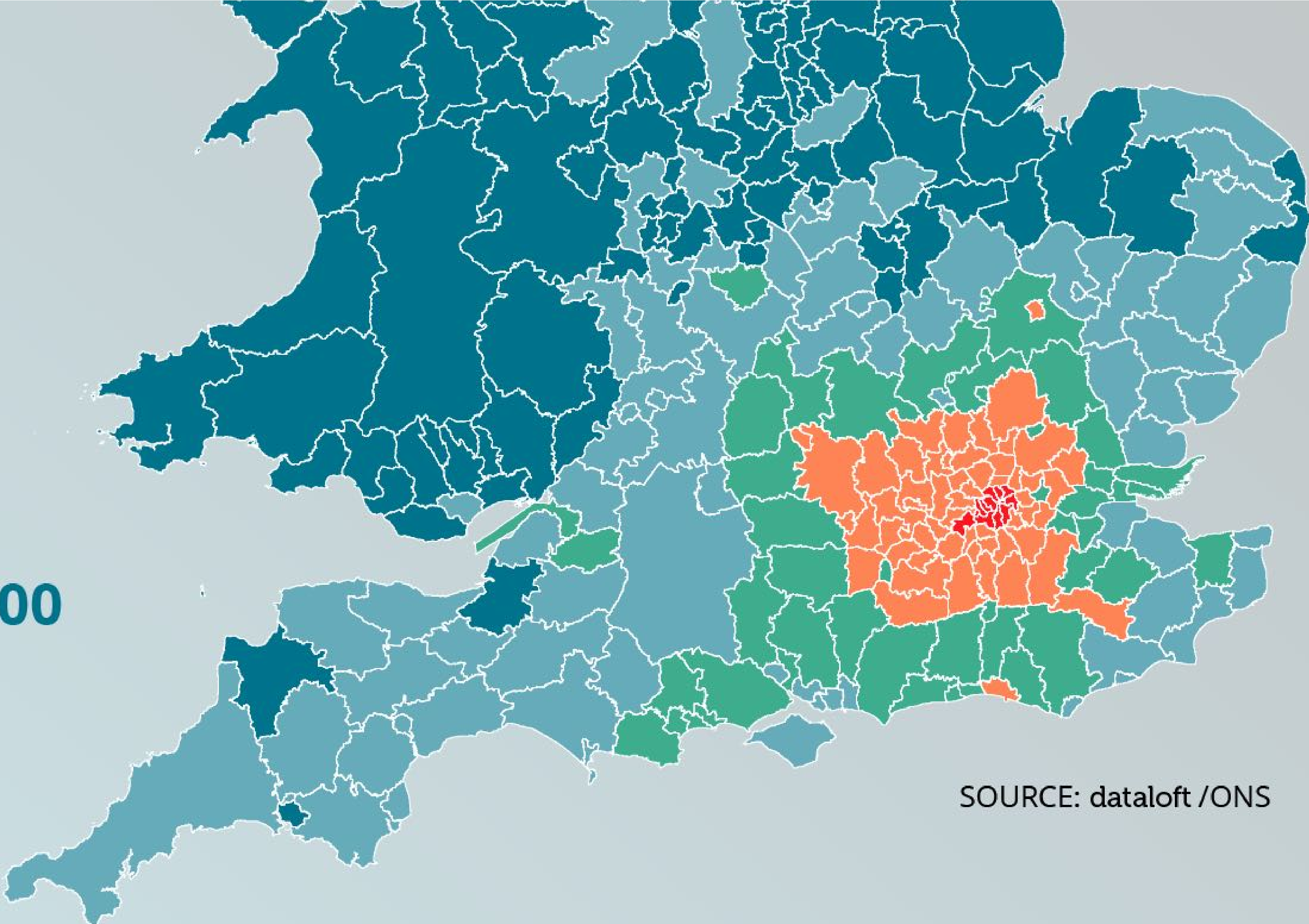
* [Bank of England Inflation Calculator](#)

wealth



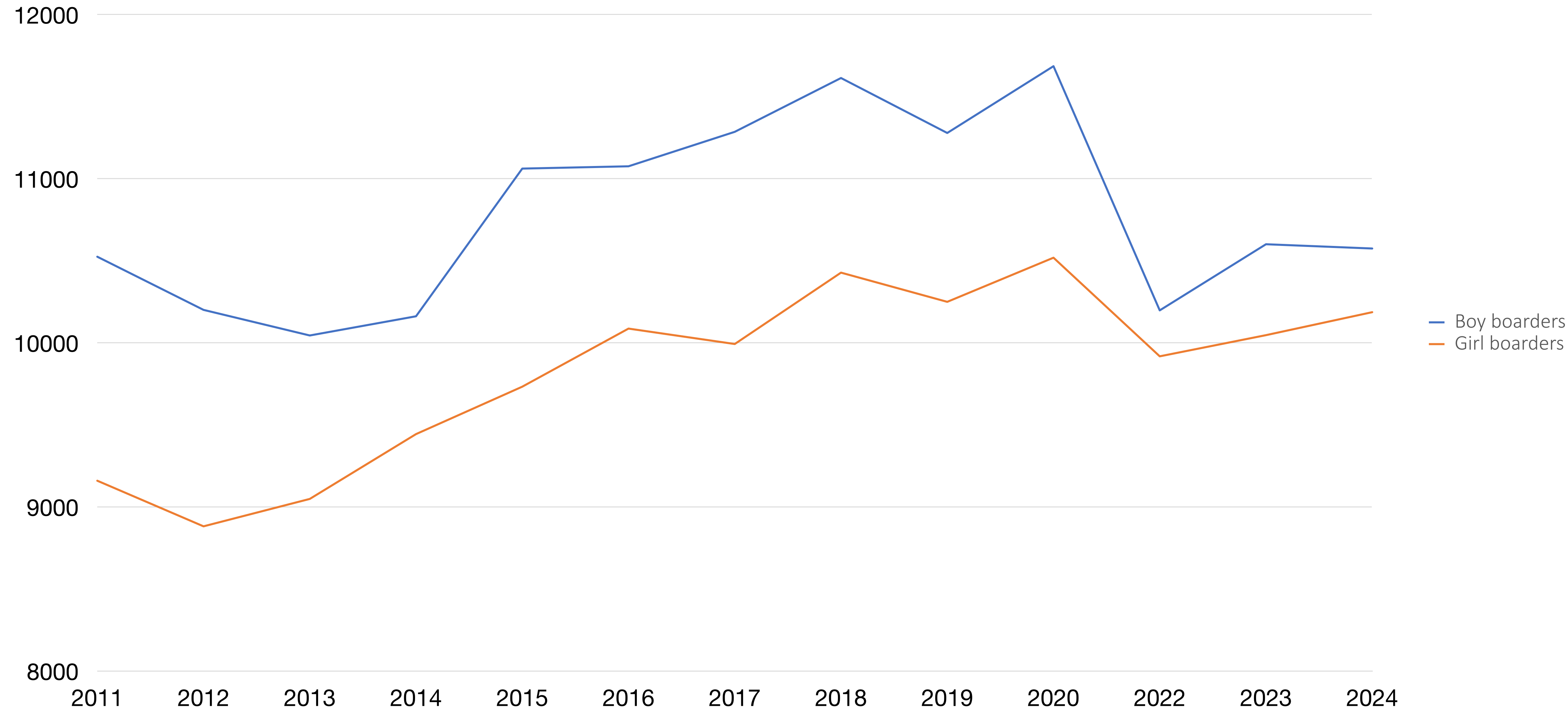
Regional composition of global wealth distribution 2023

AVERAGE £ PSM

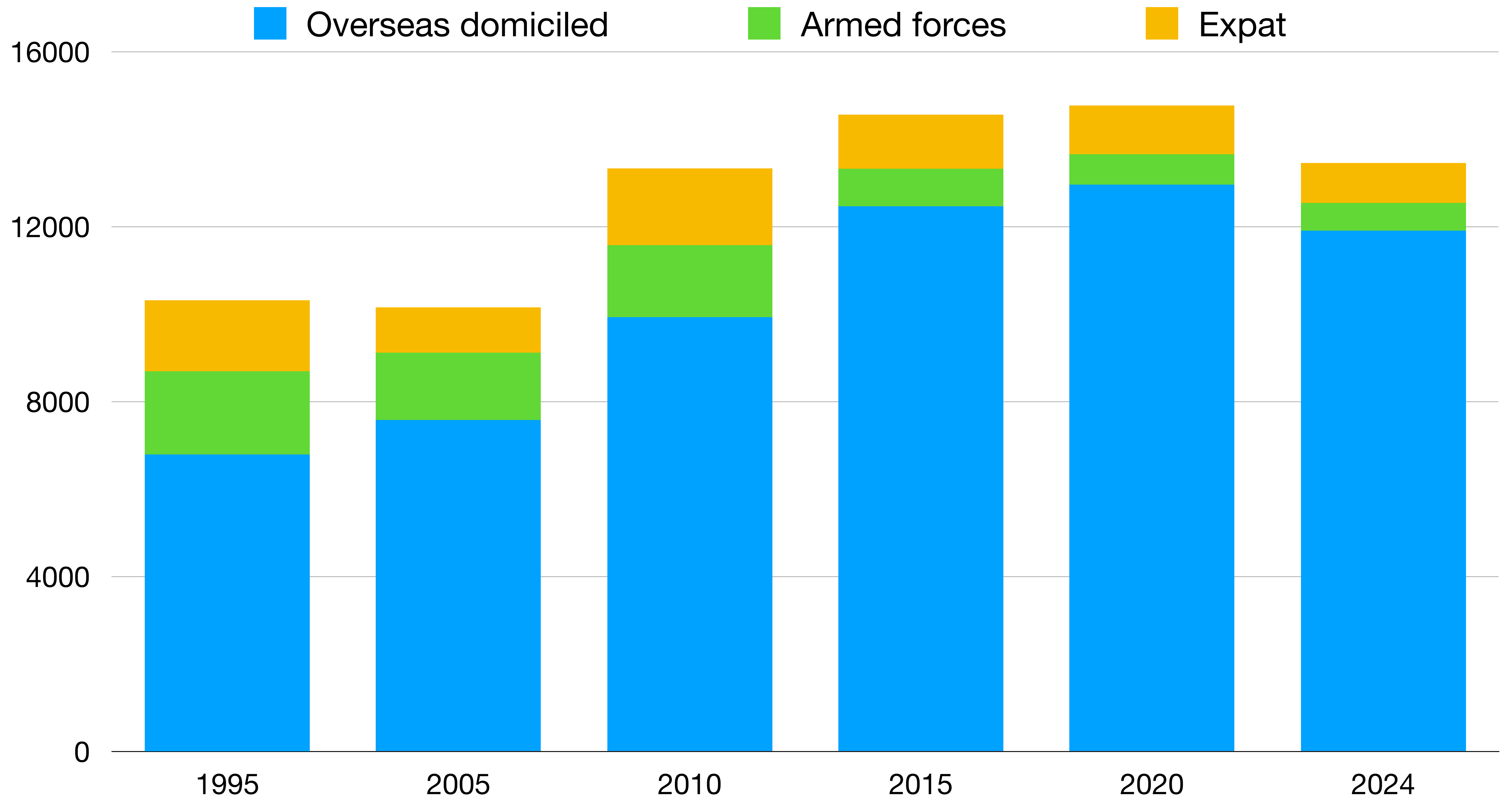


SOURCE: dataloft / ONS

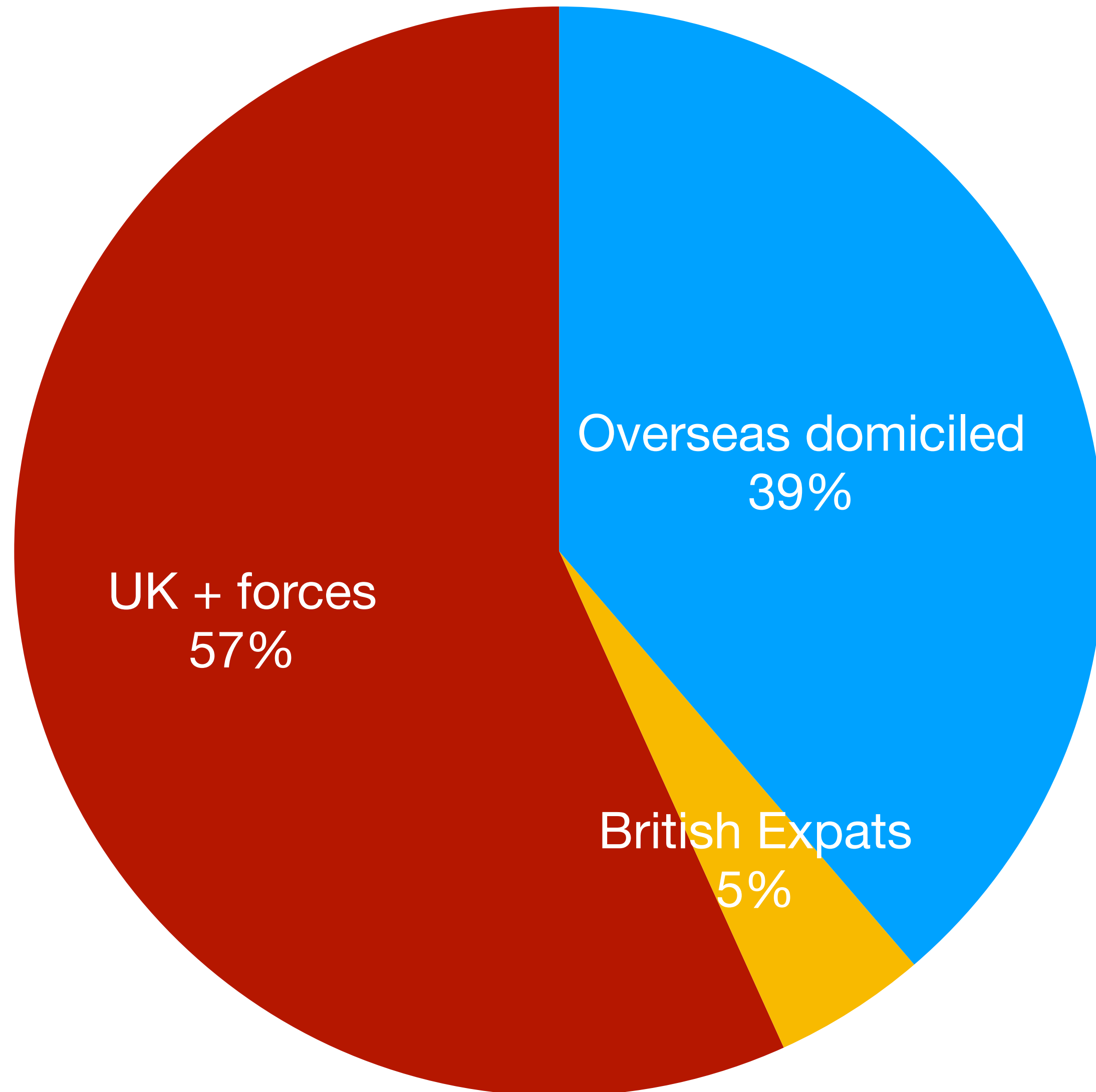
New entrants to boarding (by gender) 2011-24*



ISC schools | overseas new boarders 1995-2024

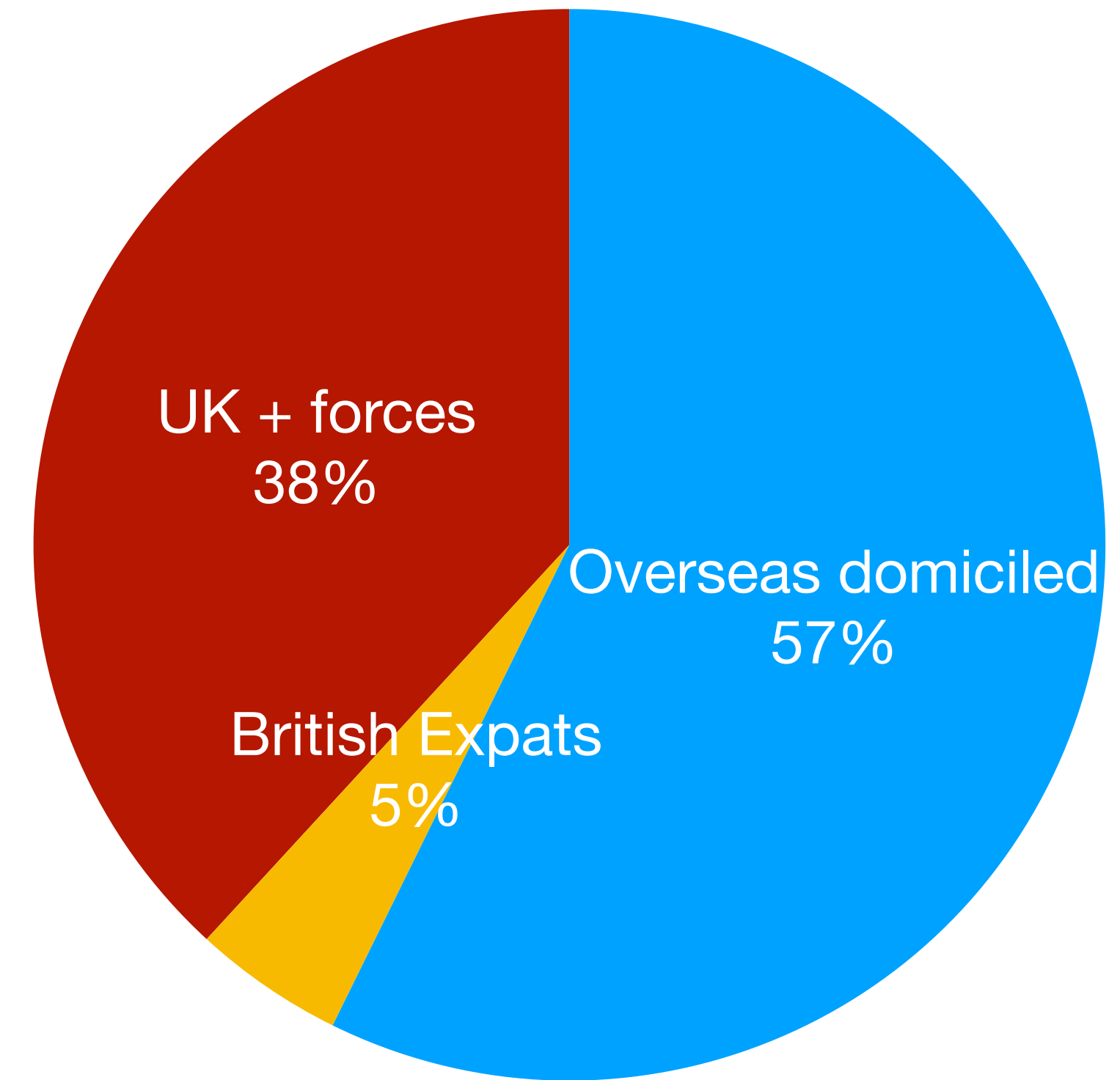


2024 Boarding Population



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

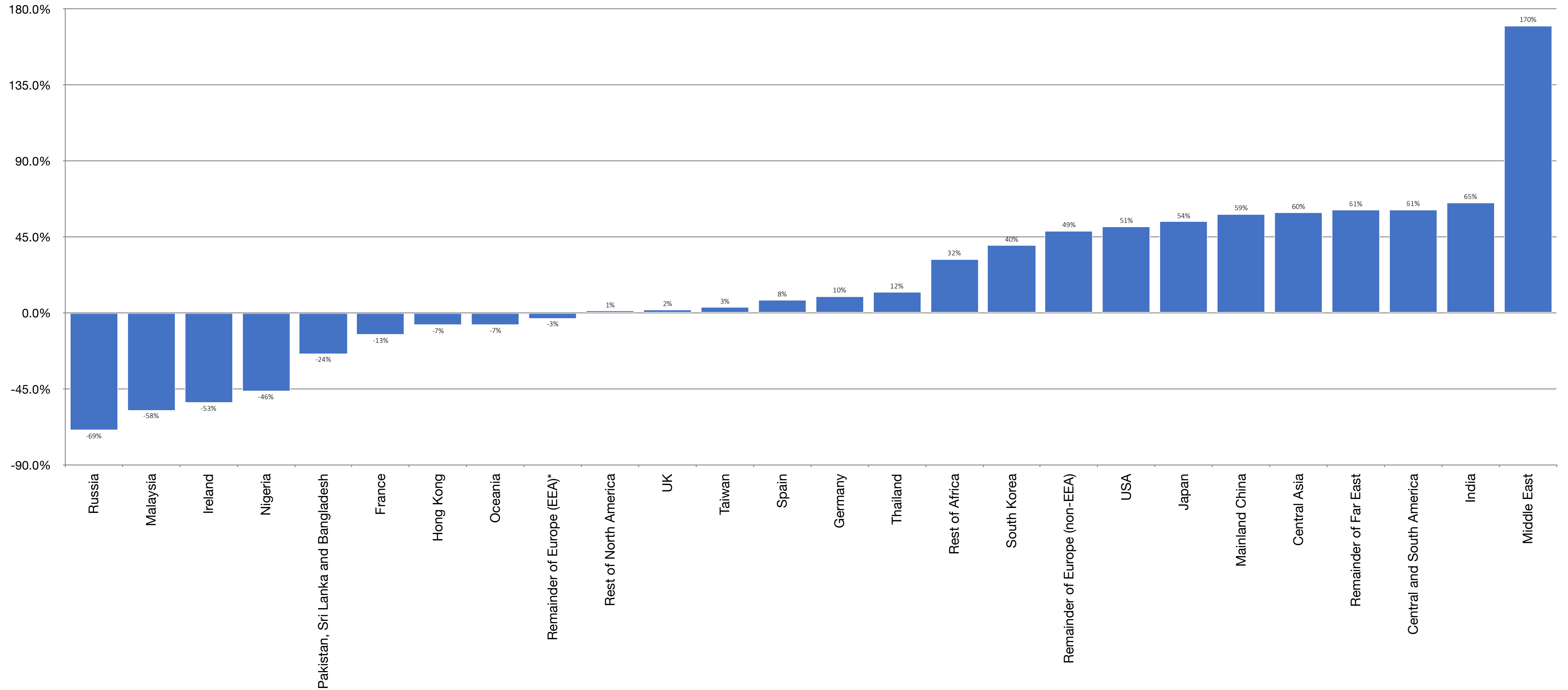
Vital for understanding student value

- 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

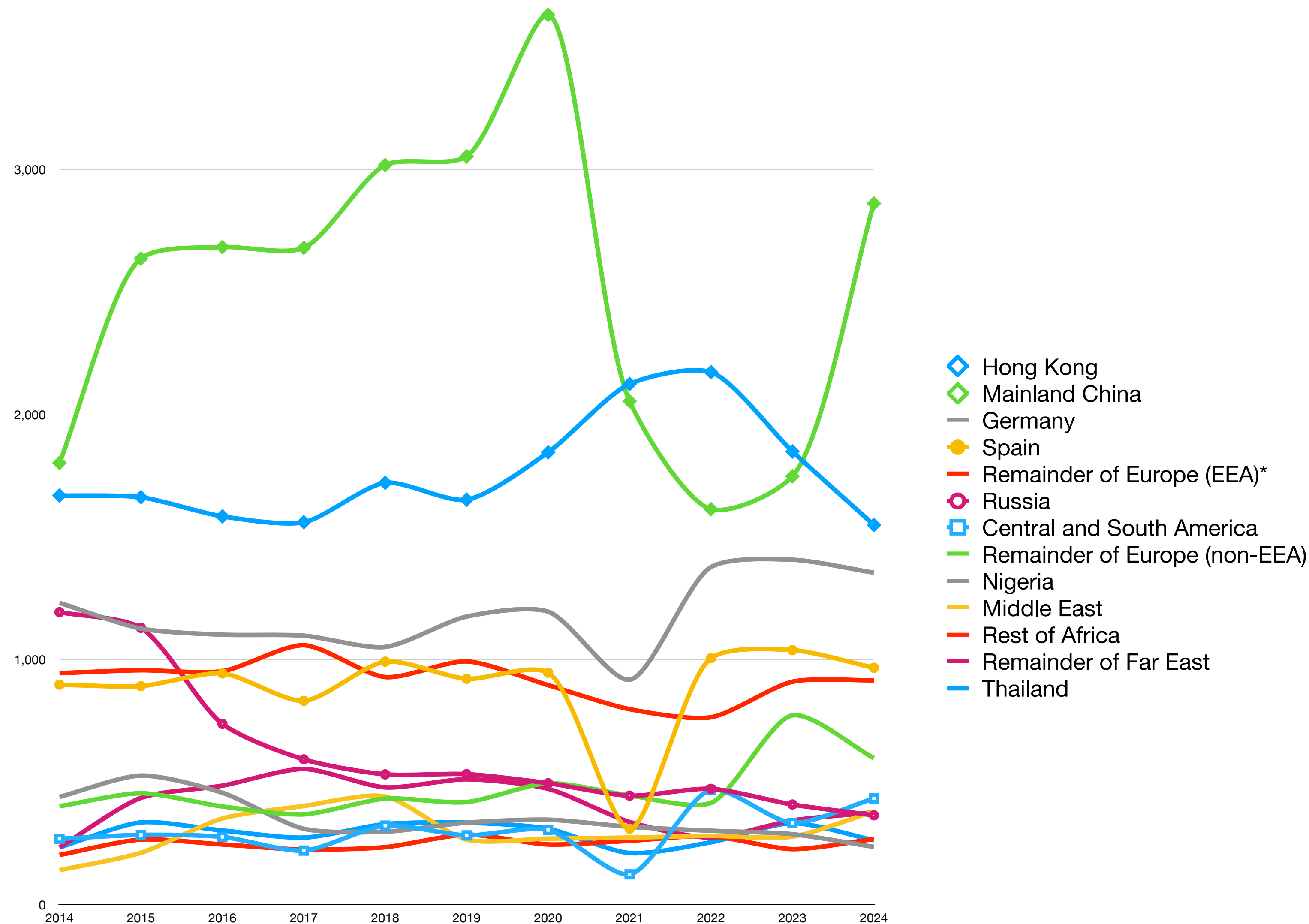
Fluctuation in global markets

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:

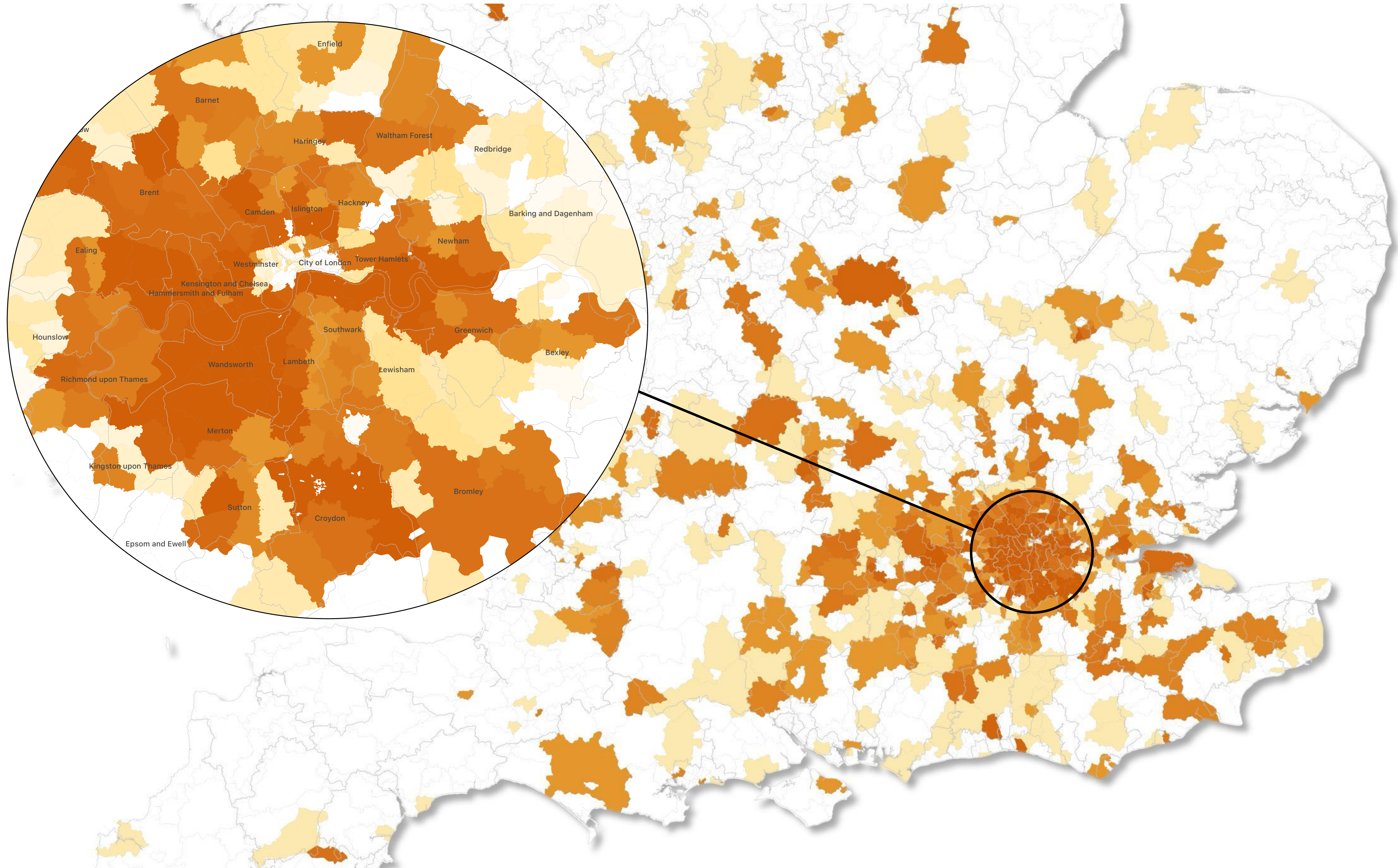
5. exchange rates - NB many families already have funds off-shore.
6. birth rates

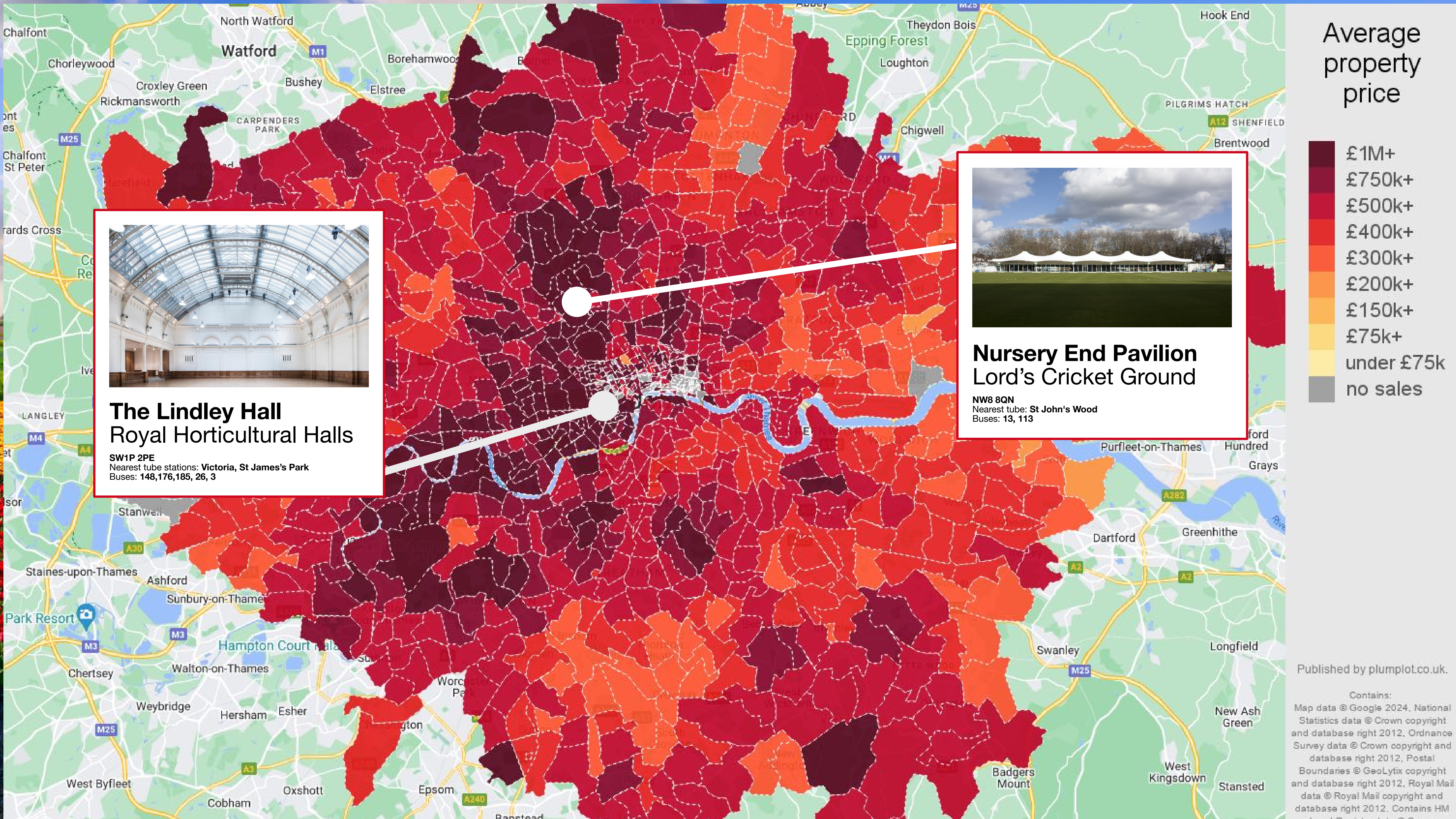


2014-24 top 13 countries providing new entrants to UK boarding schools Source: ISC Census 2014-24

2. London







Average property price



The Lindley Hall
Royal Horticultural Halls
 SW1P 2PE
 Nearest tube stations: **Victoria, St James's Park**
 Buses: 148,176,185, 26, 3

Nursery End Pavilion
Lord's Cricket Ground
 NW8 8QN
 Nearest tube: **St John's Wood**
 Buses: 13, 113

Published by plumplot.co.uk.

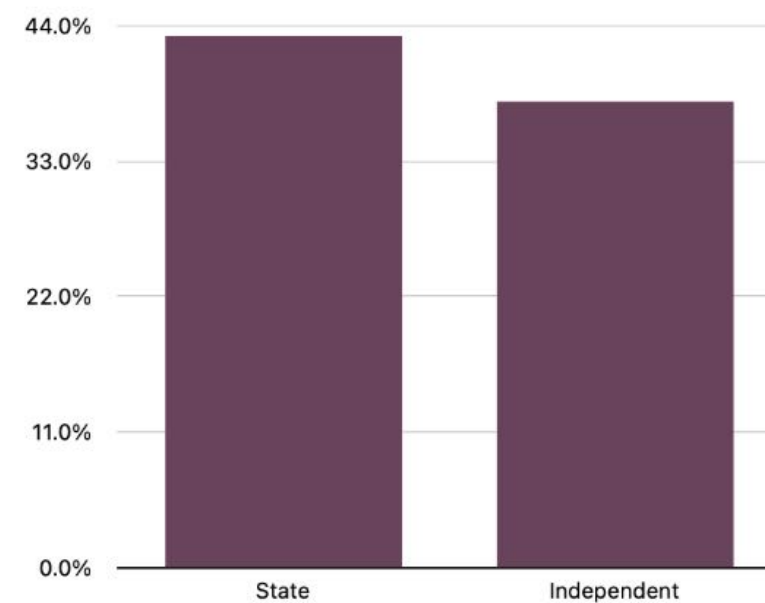
Contains:
 Map data © Google 2024, National Statistics data © Crown copyright and database right 2012, Ordnance Survey data © Crown copyright and database right 2012, Postal Boundaries © GeoLytx copyright and database right 2012, Royal Mail data © Royal Mail copyright and database right 2012. Contains HM

London parents

Current schools State / Independent

For many families the Show is an entry point into the sector.

- 43.1% have children in the state sector.
- 9.1% have pre-school aged children or children in overseas schools.
- 37.8% of ISS visitors children currently attend independent schools.



Top 10 feeders

Large groups of parents came from well-known preps and central London state primaries:

1. Christ Church Chelsea
2. St Michael's CoE Primary School
3. Belleville
4. Canary Wharf College
5. Finton House
6. Ravenscourt Park Prep
7. Wetherby
8. Benedict House
9. Boxgrove Primary, Greenwich
10. Canonbury Primary
11. Devonshire House
12. Elmhurst Prep School

Visitors' children attend 215 London schools

The show is a highly efficient way to broaden your school's presence in the London market. Large numbers of parents come from well-known feeder schools, but many also have children in local schools and nurseries. For many families the Show is the entry point into the sector.

- | | | |
|-------------------------------|----------------------------------|-----------------------------------|
| • Ada Lovelace | • Grays Convent | • Romsey |
| • Albion Primary | • Hampden Gurney Primary | • Royal Hospital School |
| • Allfarthing school | • Hampton School | • Rutherford |
| • Alpha Preparatory School | • Harris Riverside | • Saint Ronan's School |
| • Amesbury | • Harris South Kenton | • Seahorse Nursery |
| • Ark Atwood | • Hatfield Community Free School | • Shoreham College |
| • Ark Byron | • Heathbrook Primary | • Shrewsbury House |
| • Ark Priory Primary | • Heathsides Prep | • Simran Patel |
| • Ashcroft Technology Academy | • Hill House Prep | • Sissinghurst Primary |
| • Ashford Park Primary | • Holcombe Grammar | • Southbank |
| • Belleville | • Holland Park School | • Southend High School for Girls |
| • Benedict House | • Holy Cross | • Southfields Academy |
| • Bentham Manor School | • Homefield Prep School | • St Anne's CoFe Primary |
| • Bilton Grange Prep | • Honeywell | • St Augustine's priory |
| • Blackheath High School | • Hornsby House | • St Barnabas Primary |
| • Blackheath Prep | • Hotham Primar | • St Bernard's Prep |
| • Blossom House | • Jeannine Manuel | • St Cedds |
| • Box Hill | • John Hampden Grammar | • St Clements & St James |
| • Boxgrove Primary, Greenwich | • John Madejski Academy | • St Davids Preparatory Purley |
| • Brandiehow Putney | • John Stainer Primary | • St Edward's Catholic Primary |
| • Breaside | • Kenmore Park Junior | • St Edwards Middle School |
| • Brecknock | • Kew College Prep | • Windsor |
| • Brentwood Preparatory | • Kew Green Prep | • St Francis College |
| • Bright Horizon | • Kings College School | • St George's CoE Primary |
| • Bright Little Star | • Kings Interhigh School | • St Hilda's |
| • Broadfields Primary | • Kirkcudbright | • St James RC |
| • Broomwood | • Kotor School, Montenegro | • St Jerome Bilingual Primary |
| • Buckswood | • Lady Margeret | • St John's Primary |
| • Burgess Hill Girls | • Lamenier Sacred Heart Primary | • St Joseph High School |
| • Burlington House | • Latymer | • St Joseph's Catholic School, |
| • Busybees Nursery | • Little Muffins | • Highgate |
| • Bute House | • Lloyd Williamson School | • St Joseph's Federation Catholic |
| • Caldicott Prep | • Lockers Park | • Junior |
| • Canary Wharf College | • London Park School | • St Joseph's RC Primary School |
| • Canonbury Primary | • Macaulay Primary | • St Martins |
| • Chatham Grammar for Girls | • Manor Lodge School | • St Mary's Catholic Primary |
| • Chepstow House | • Marie d'Orliac | • School |
| • Chisenhale Primary | • Mathew Arnold | • St Mary's CoE Primary |
| • Christ Church Chelsea | • Milton Keynes Preparatory | • St Matthew's Primary, |
| • Christopher's, The Hall | • Montpelier Primary | • Westminster |
| • Christs Hospital | • Mossbourne Riverside | • St Michael's CoE Primary School |
| • City Junior School | • Mulberry Wood Wharf Primary | • St Peter's Eaton Square Primary |
| • City of London Boys | • Myatt Garden Primary | • St Saviour's CoE |
| • City Way Nursery | • New Hall school | • St Stephen's CoE |
| • Colombo International | • Newton Prep | • St Thomas of Canterbury |
| • Colton Hills Community | • Normanhurst | • Staines Prep School |
| • Corpus Christi | • North Wootton Academy | • Stifford Clays Primary |
| • Curwen Primary | • Nottingham High School | • Sydenham High |
| • Dair House School | • Old Bexley Primary | • Telferscot Primary |
| • Dean Close | • Orchard House | • Tetherdown |
| • Deanesfield Primary | • Orion Primary | • The Abbey School |
| • Devonshire House | • Orley Farm | • The Archer Academy |
| • Durston House | • Our Lady & St Joseph Catholic | • The Broxbourne School |
| • EastCourt School | • Primary | • The Cedars |
| • Eaton House, The Manor | • Our Lady of Peace Primary | • The Ravensbourne School |
| • Eaton Square Senior | • Our Lady of Victories, | • Thomas's Battersea |
| • Ebbsfleet Green Primary | • Kensington | • Thomas's Clapham |
| • Elizabeth Garrett Anderson | • Oxford Gardens | • Thomas's Clapham |
| • Secondary | • Papplewick | • Thomas's Kensington |
| • Elmhurst Prep School | • Parkgate House | • Thomson House School |
| • Emanuel | • Pembroke Hall | • Thorntree Primary |
| • Fairstead House | • Perrott Hill | • Tidemill Academy |
| • Faraday Prep | • Pinnerwood | • Vincent's Catholic Primary |
| • Filip | • Pippa Popins | • Vineyard |
| • Finton House | • Primrose Hill Primary | • Wallington High |
| • Fircroft | • Putney High | • Wembley Primary |
| • Fox Primary | • Queen Camel | • West Lodge Primary |
| • Fulham Bilingual | • Queens College | • Wetherby |
| • Fulham Prep | • Ramridge Primary | • Whitegate |
| • Garden House | • Ravenscourt Park Prep | • William Tyndale Primary |
| • Gatehouse School | • Reddam House | • Wood Wharf Kindergarten |
| • George Edward | • Redriff | • Woodford Green Preparatory |
| • Godolphin School | • Rhodes Avenue | |
| • Goodwyn | • Riverside Nursery Battersea | |
| • Granton Primary | • Rokeby | |

London parents

London parents

problems

doubts

solutions



London parents

problems

class sizes (state)

day school academics

teenage London

family structures

health activity

work patterns

after school care

solutions

full / flexi

global outlook

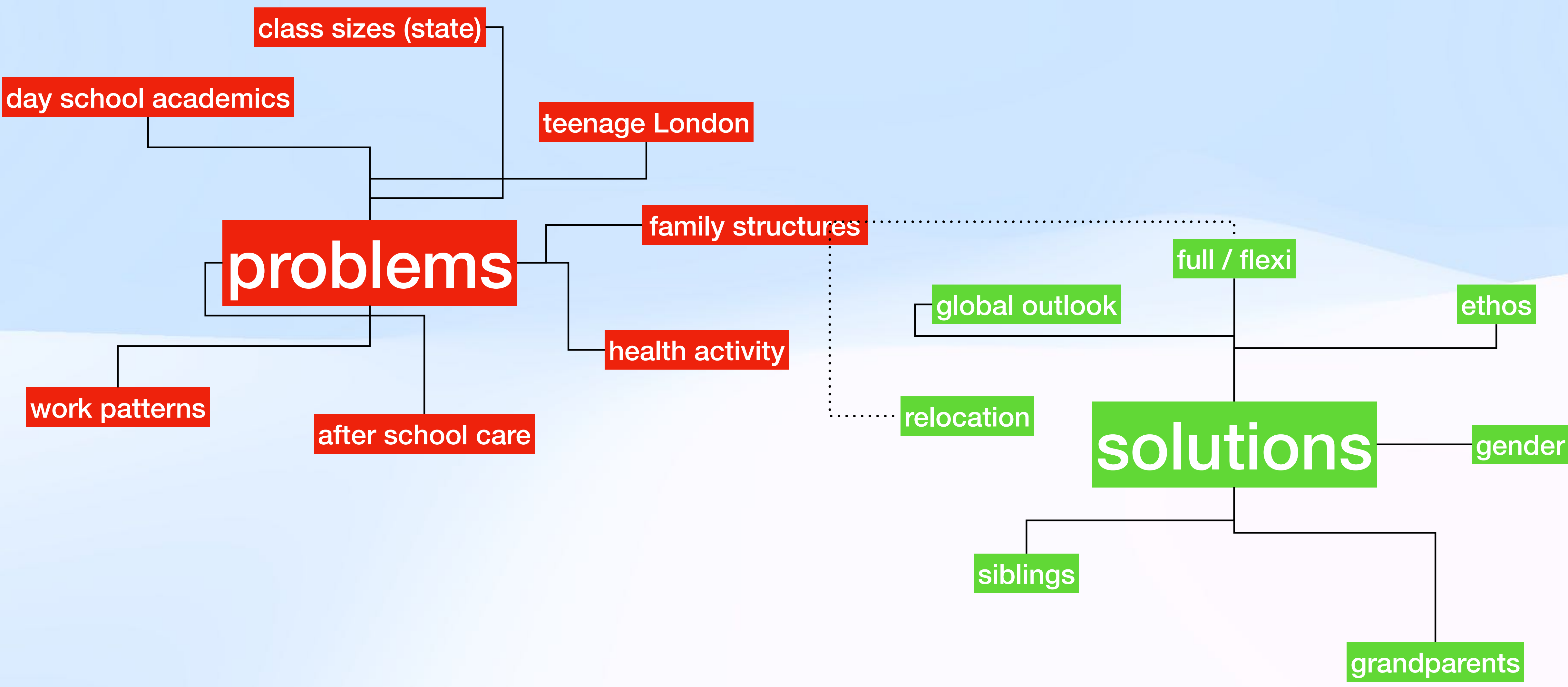
ethos

relocation

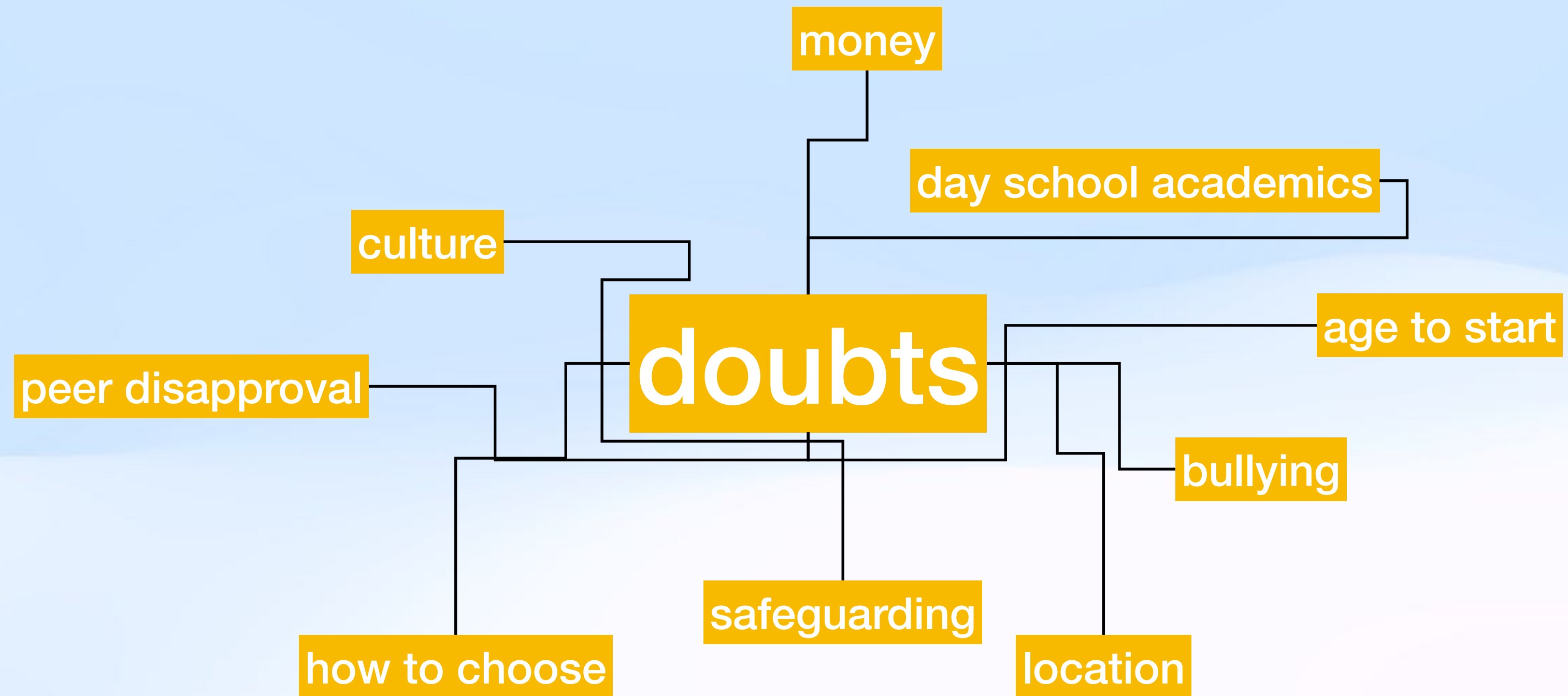
gender

siblings

grandparents



London parents



undecided

Urbanite

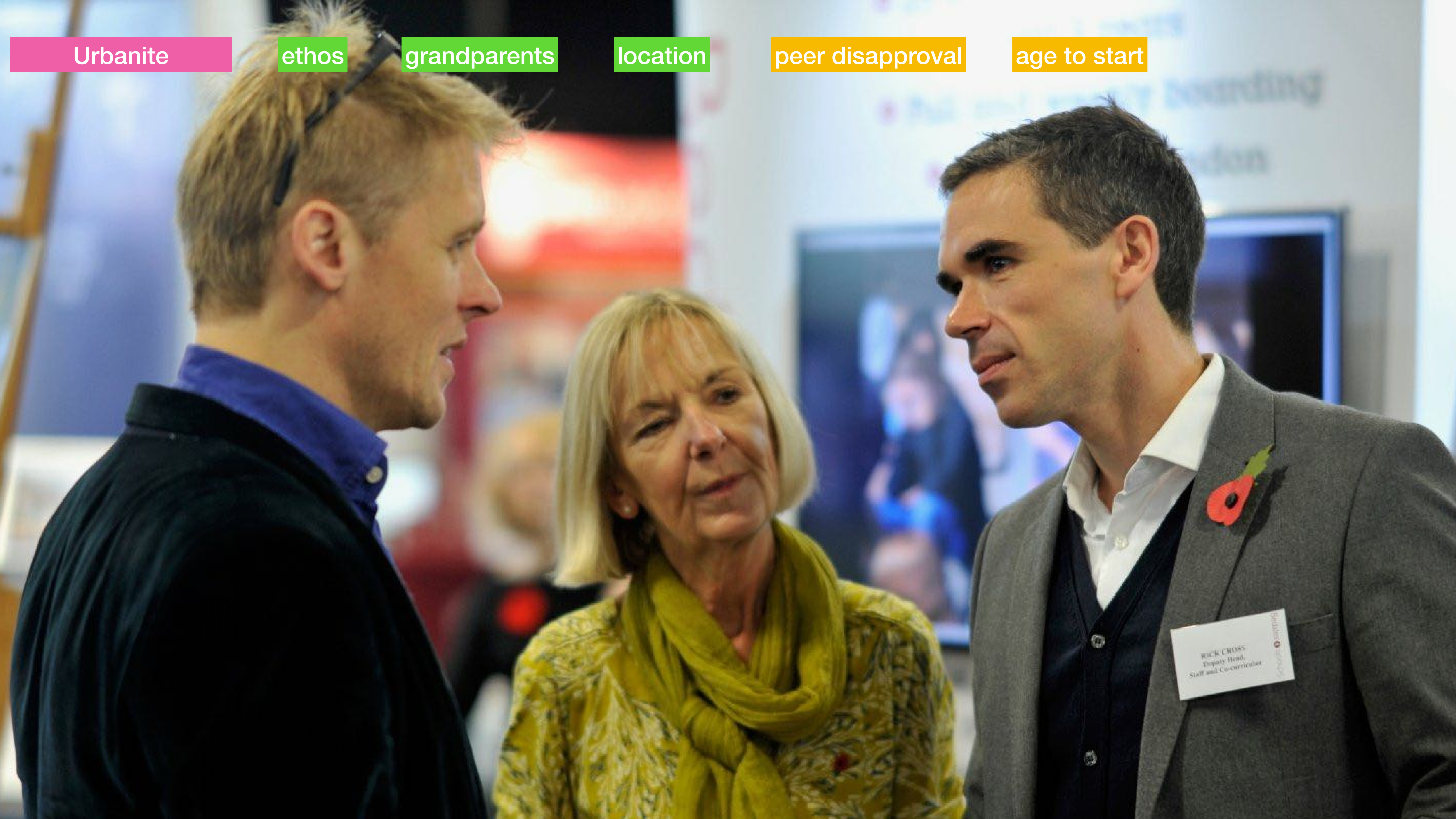
ethos

grandparents

location

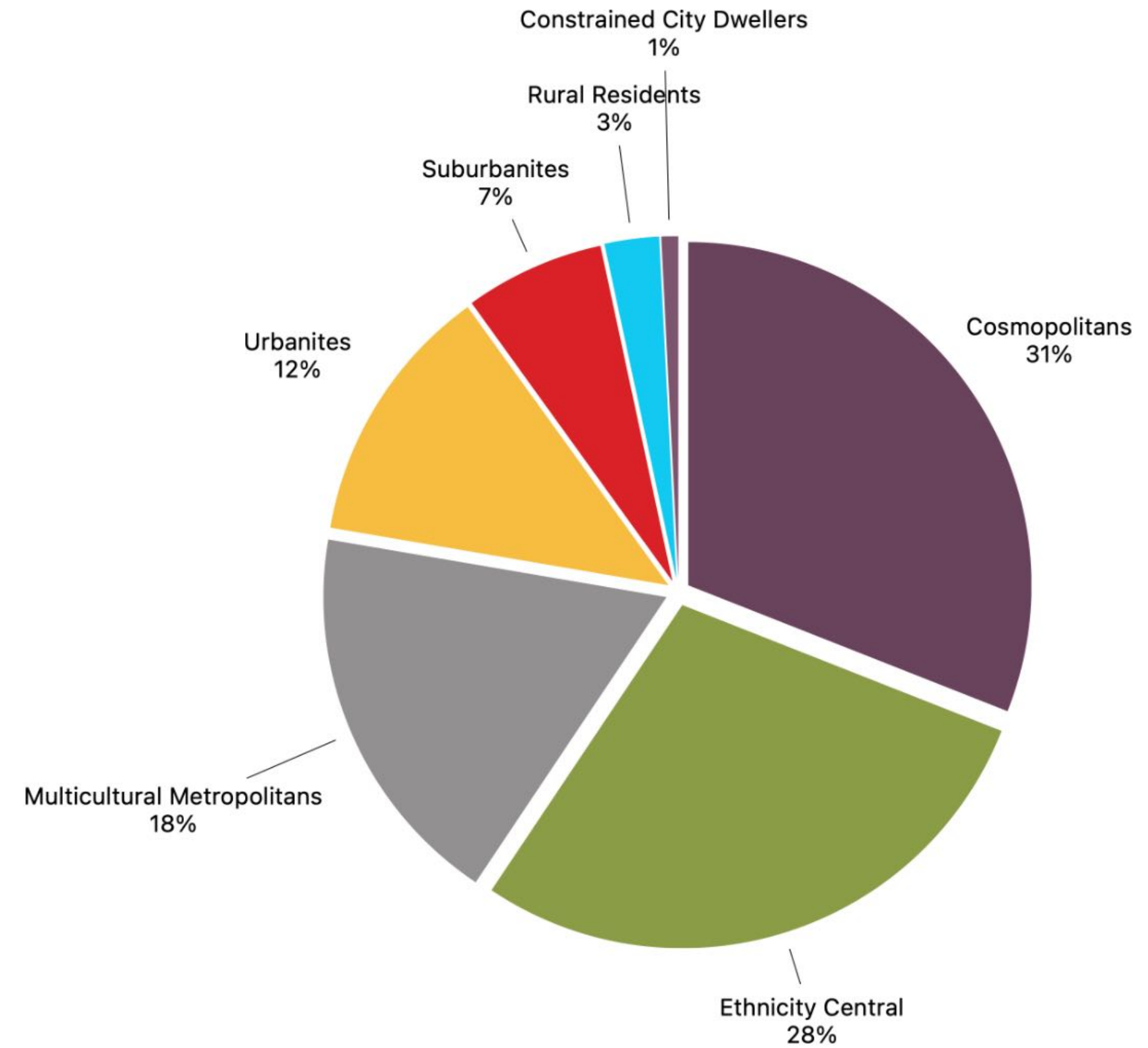
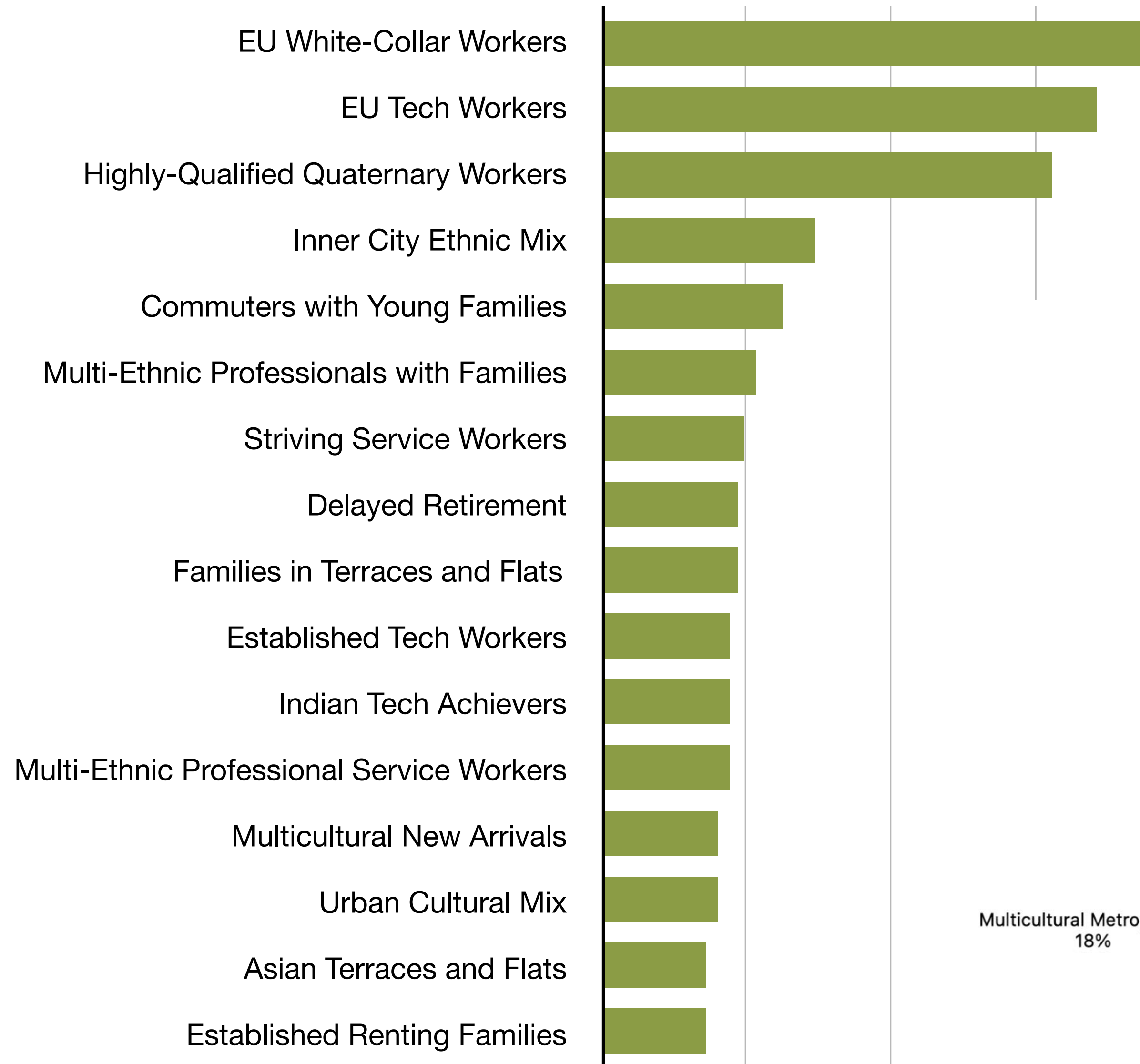
peer disapproval

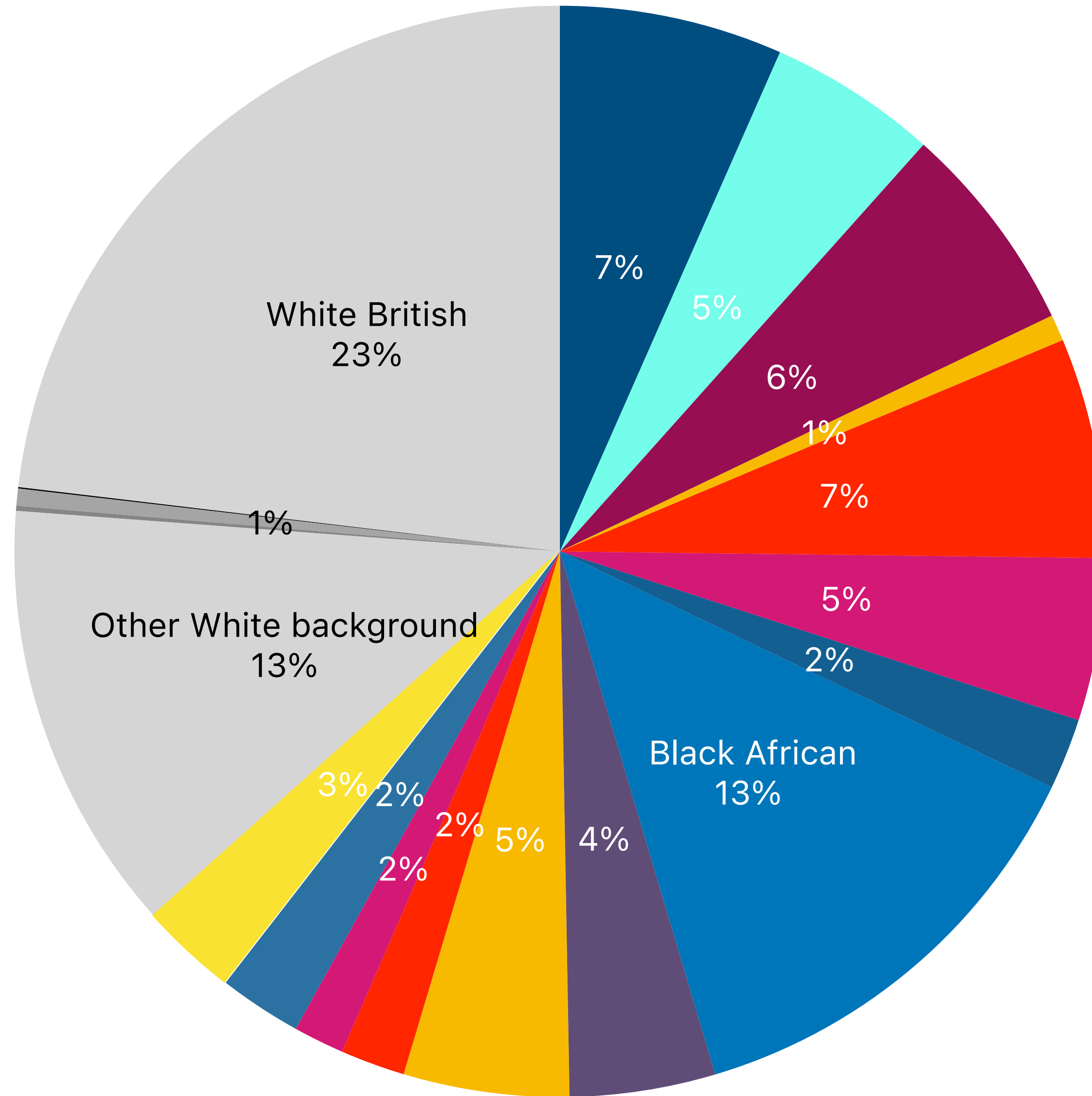
age to start





postcode analysis





- Any other ethnic group
- Asian - Any other Asian background
- Asian - Bangladeshi
- Asian - Chinese
- Asian - Indian
- Asian - Pakistani
- Black - Any other Black background
- Black African
- Black - Black Caribbean
- Mixed - Any other Mixed background
- Mixed - White and Asian
- Mixed - White and Black African
- Mixed - White and Black Caribbean
- Unclassified
- Other White background
- White - Gypsy/Roma
- White - Irish
- White - Traveller of Irish heritage
- White British

London's secondary school students are far less likely to identify as 'White British' than their peers across England*

*DfE 2022 Pupil Characteristics tables

Tech achievers

day school academics

considering boarding

work patterns

global outlook



Over 2,000 educational establishments in France offer some form of boarding for students. Around 245,000 students use boarding facilities at some point, although the large majority are students in their final years of technical and general high schools (lycées d'enseignement général et technique). Many students only board during their final year during preparatory classes for the Grandes Ecoles.

As of 2015 there were about 100,000 boarding schools in rural areas of mainland China, with about 33 million children living in them. Many migrant workers and farmers in rural China send their children to boarding schools.

In addition to the rural boarding schools there are also boarding schools, including kindergartens, in urban areas. As of 2017 about 4% of the children in urban areas, about 3.5 million, board. 1% of pupils at the primary level and 8% of pupils at the secondary levels board. The boarding schools are often close to students' residences, and parents believe that boarding helps the child concentrate more than if the grandparents supervised them. Chinese parents often do not have reservations over cost or over not being around their children that a Western parent would.

3. Overseas Parents

political upheaval



LORETTA

WINDLESHAM

WINDLESHAM

Windlesham

Windlesham

Boys and Girls 2-18 | Boarding and Day
South West England | Boarding from age 7

MILLFIELD

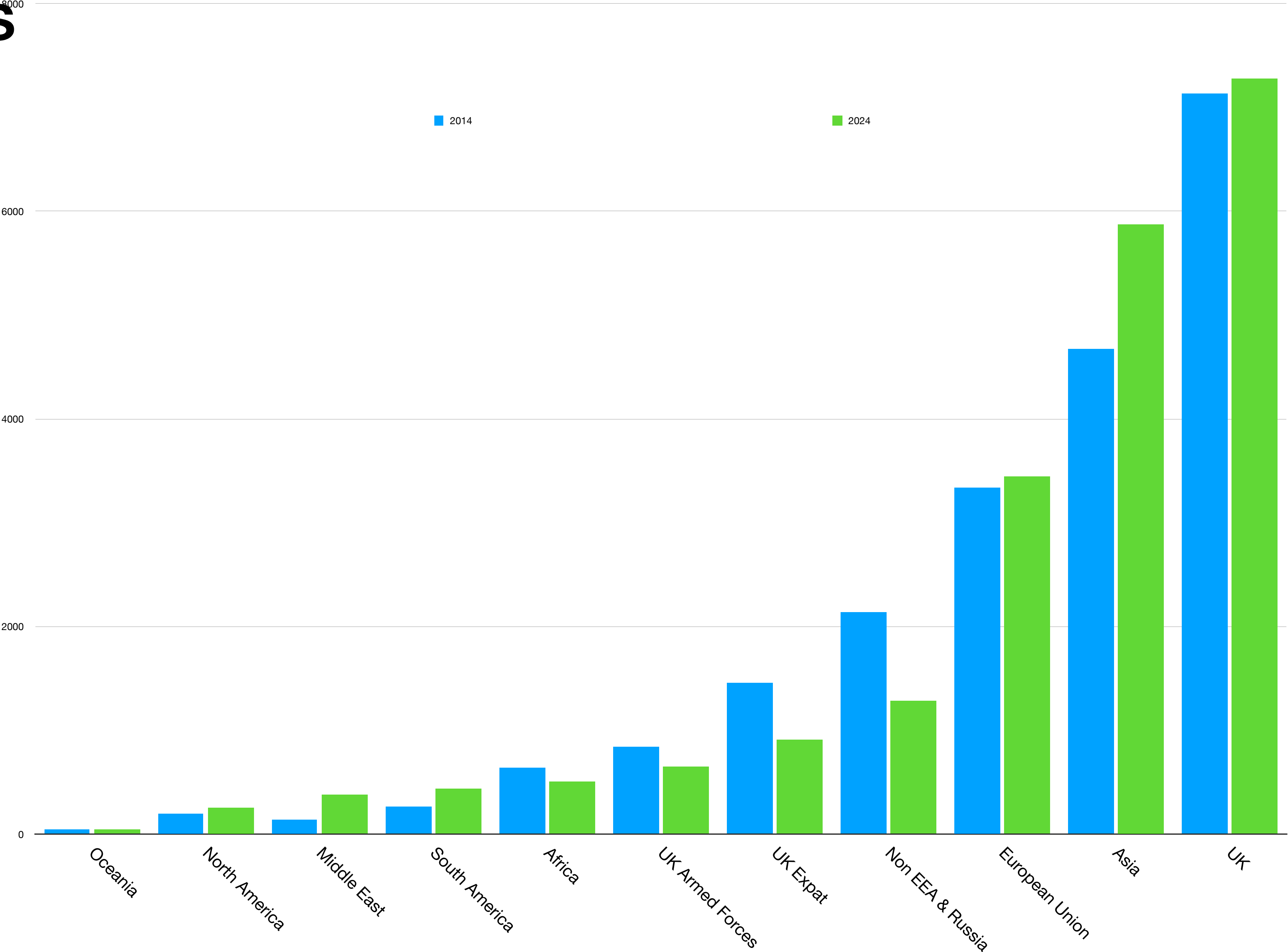
Boys and Girls 2-18 | Boarding and Day
South West England | Boarding from age 7

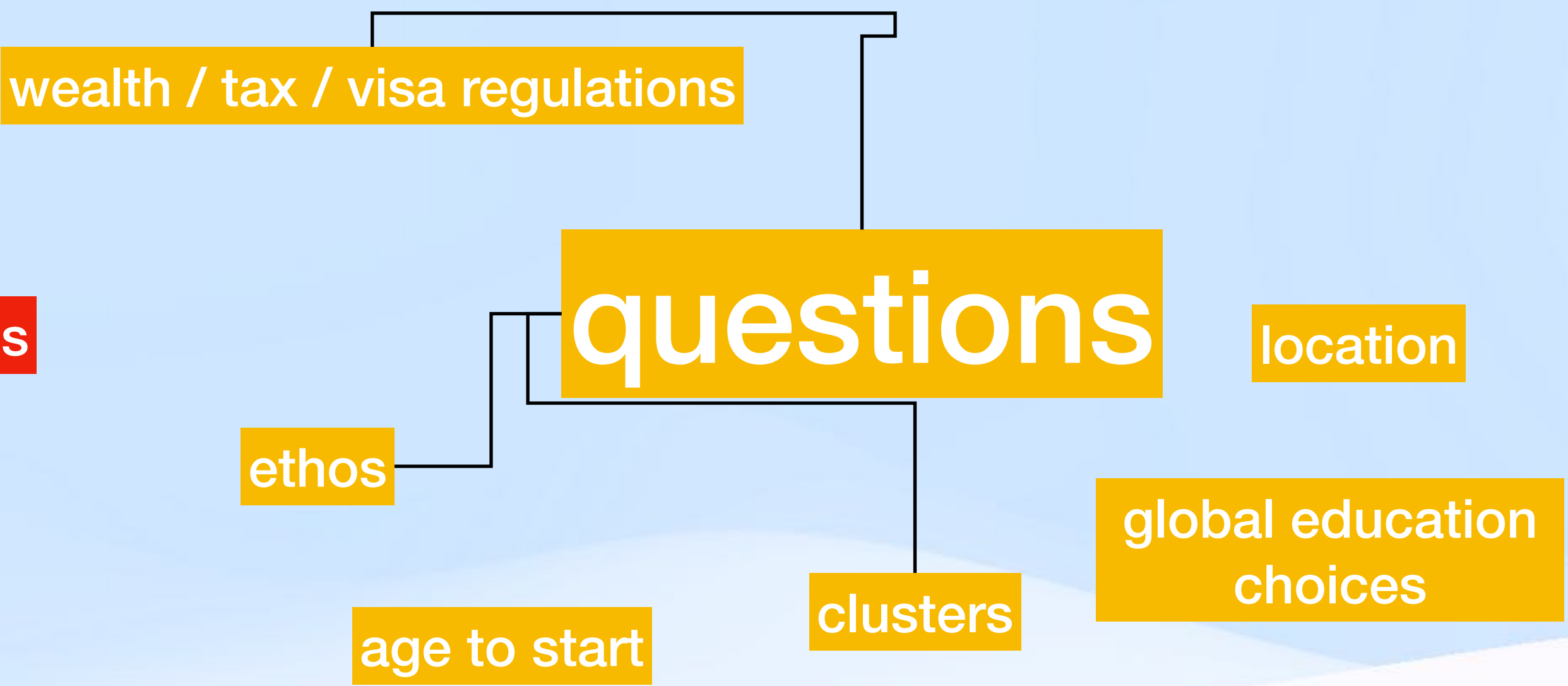
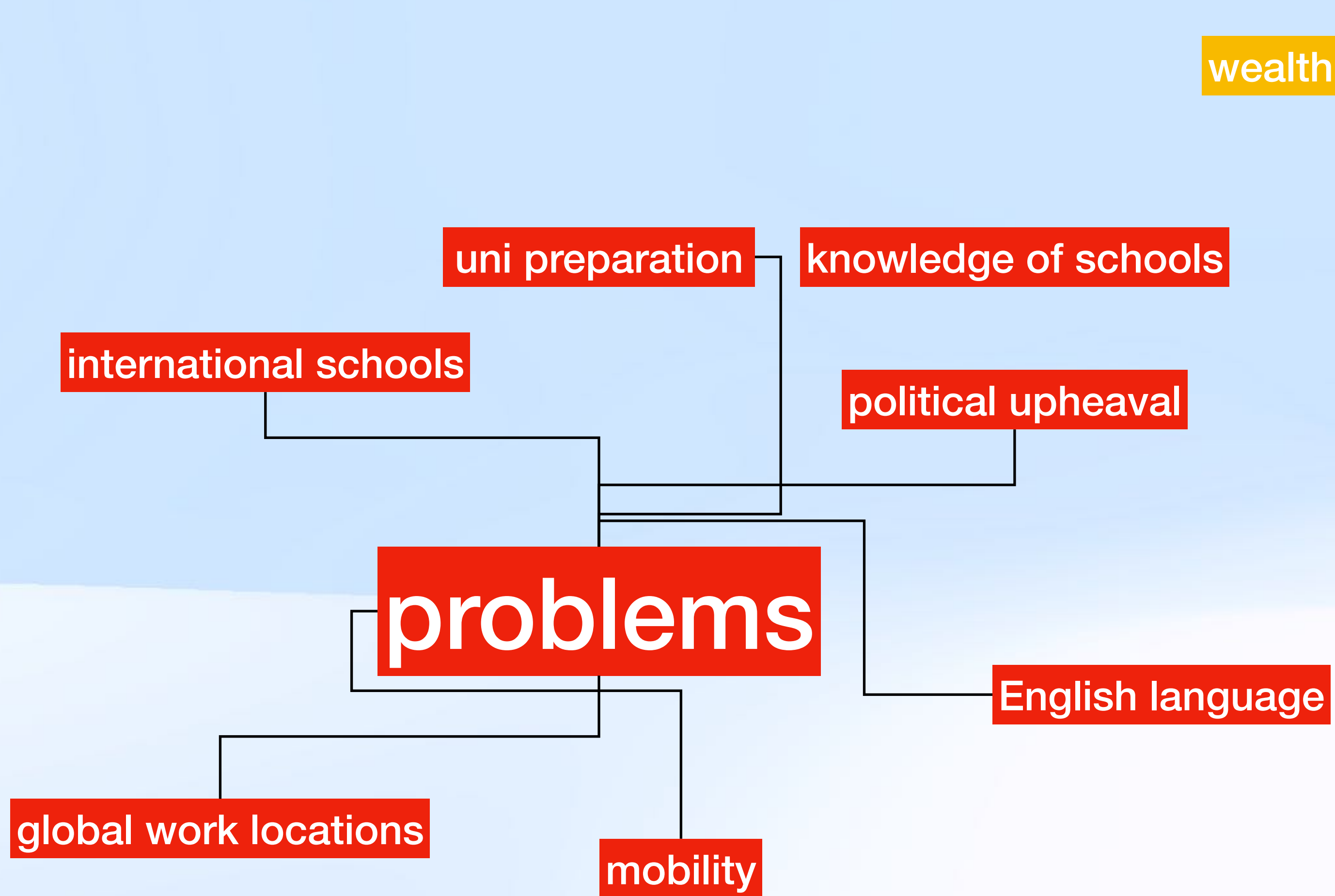
MILLFIELD

Size of markets

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

Source: ISC Census 2014-24





Overseas families

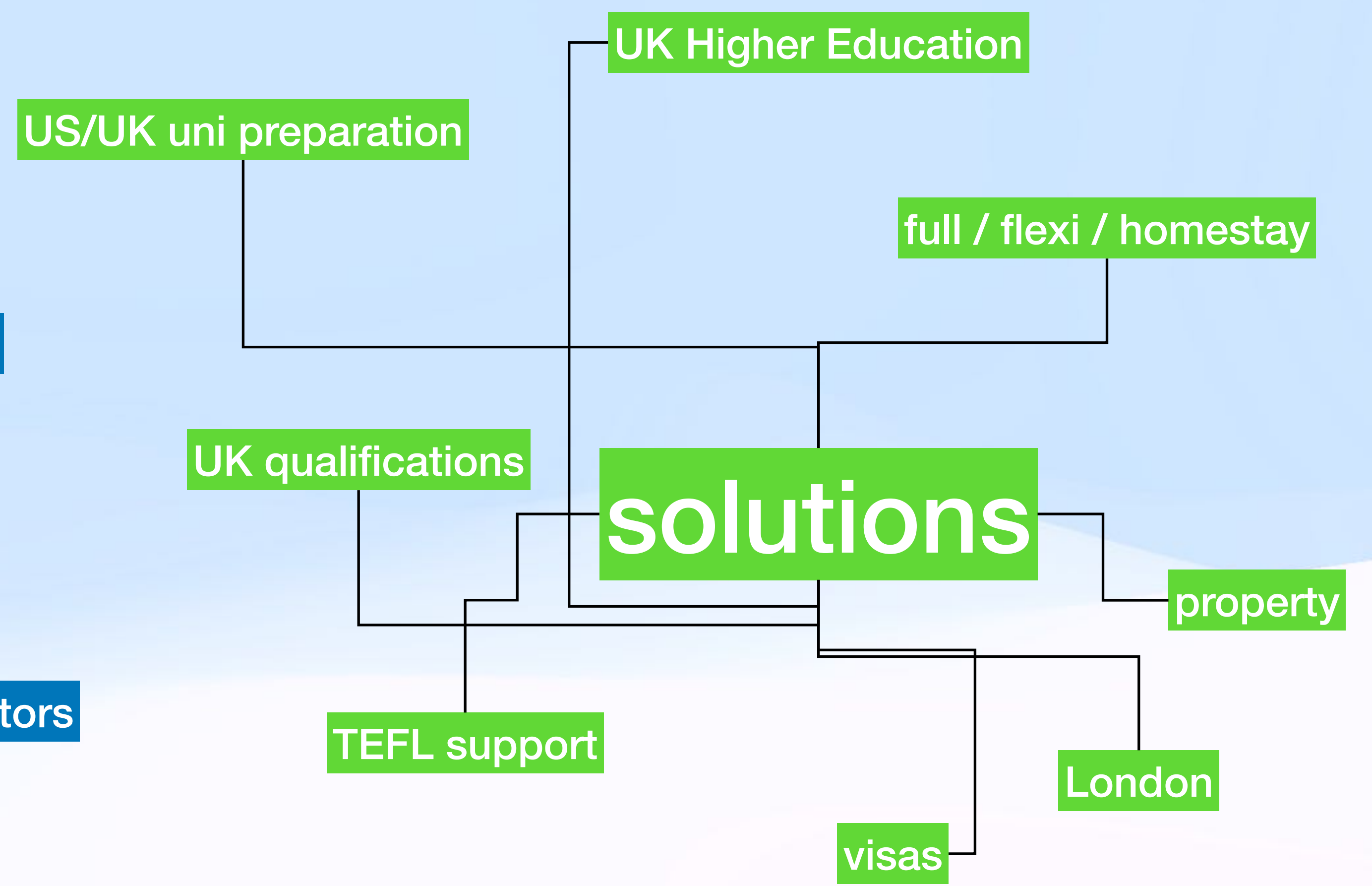
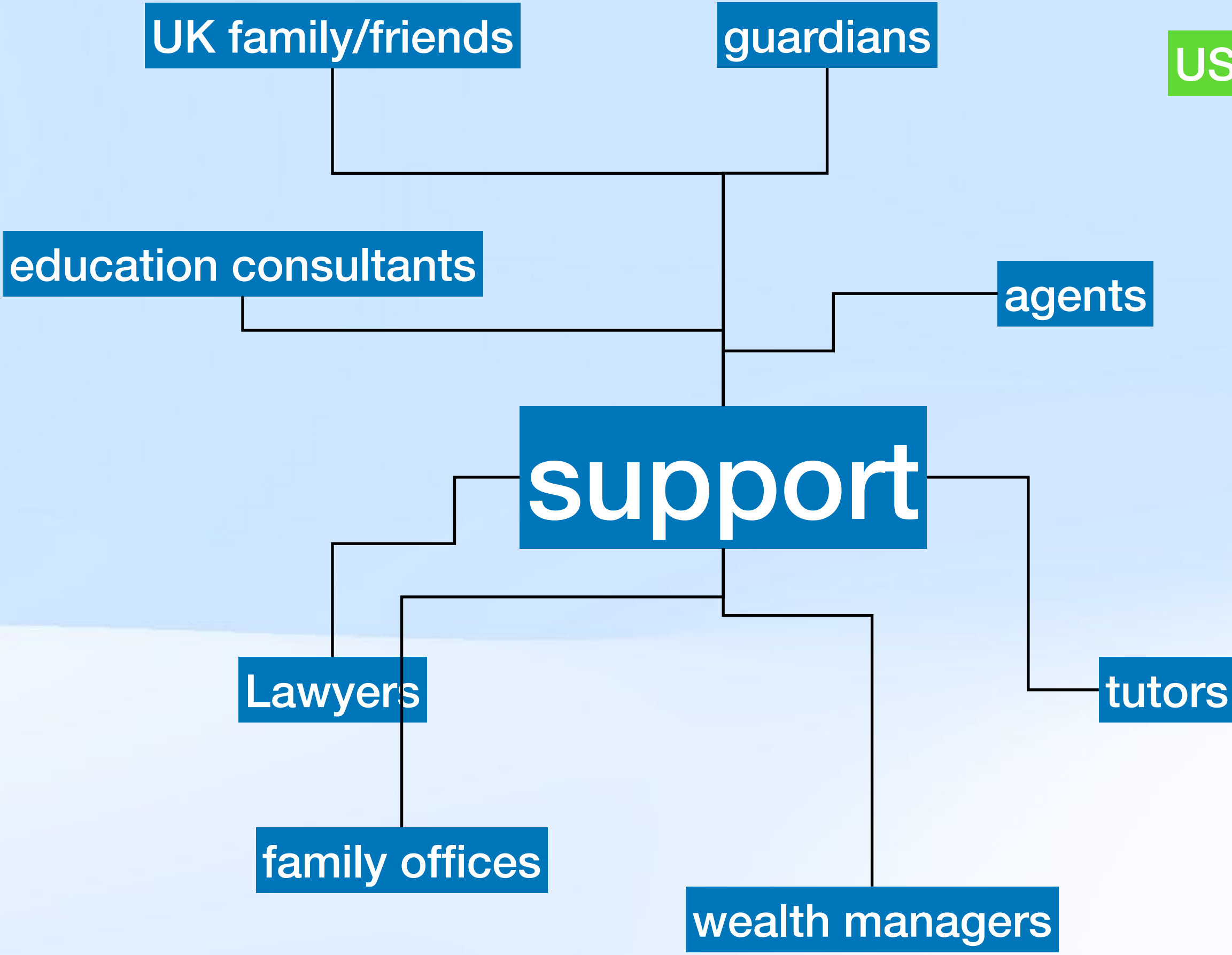


political upheaval

global work locations

wealth / tax / visa regulations

flexi



Overseas families

education consultants

TEFL support

full boarding



location

UK family/friends

clusters

- Strong evidence that students cluster
 - ie go to places where they already have friends, family or know there are students from the same culture
- This is why being a first-mover in frontier markets is so worthwhile.

November 2010

International student mobility literature review

**Report to HEFCE, and co-funded by the British
Council, UK National Agency for Erasmus**

Russell King
Sussex Centre for Migration
Research
University of Sussex

Allan Findlay
Centre for Applied Population
Analysis
University of Dundee

Jill Ahrens
Sussex Centre for Migration Research
University of Sussex

© HEFCE 2010

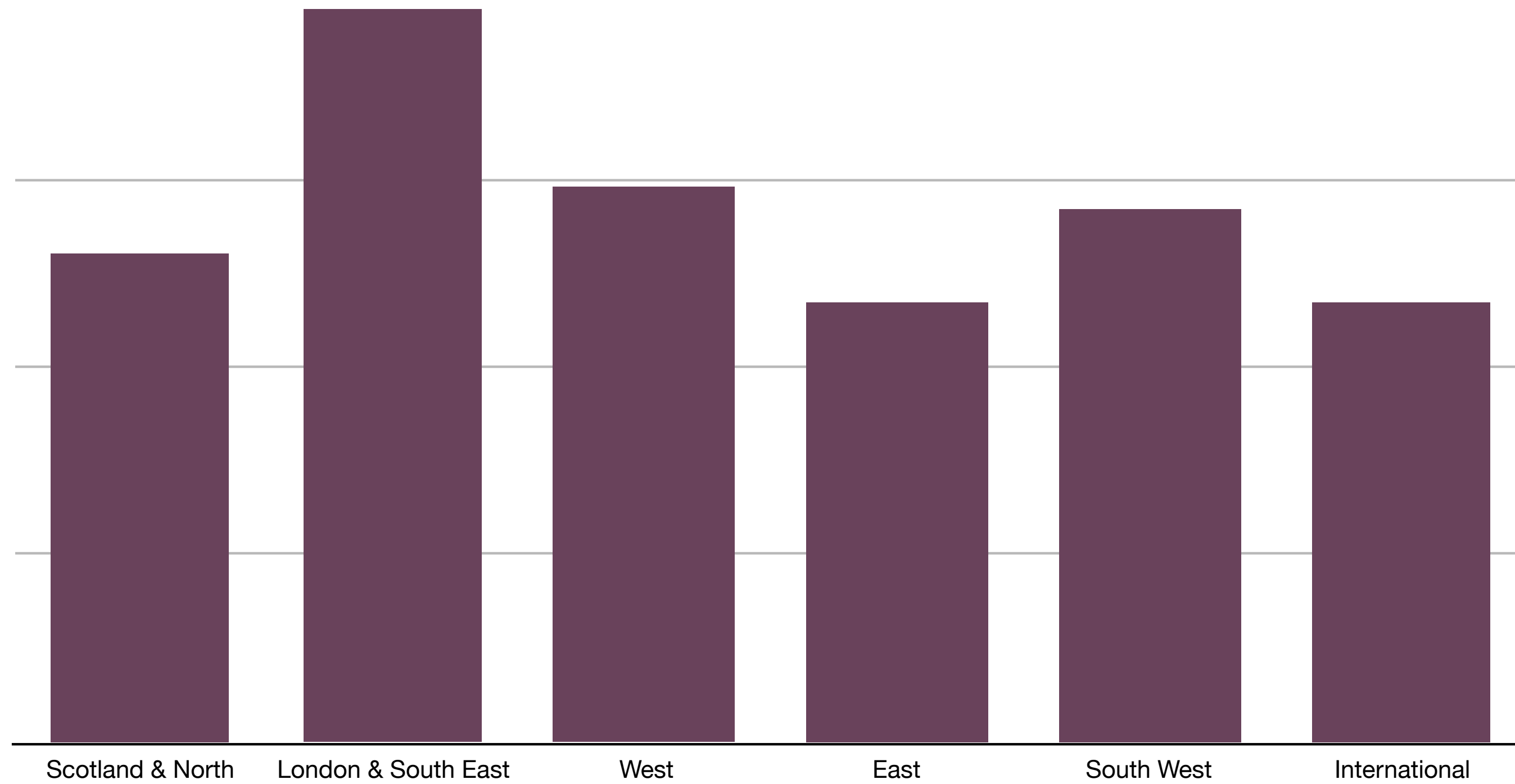
location

knowledge of schools

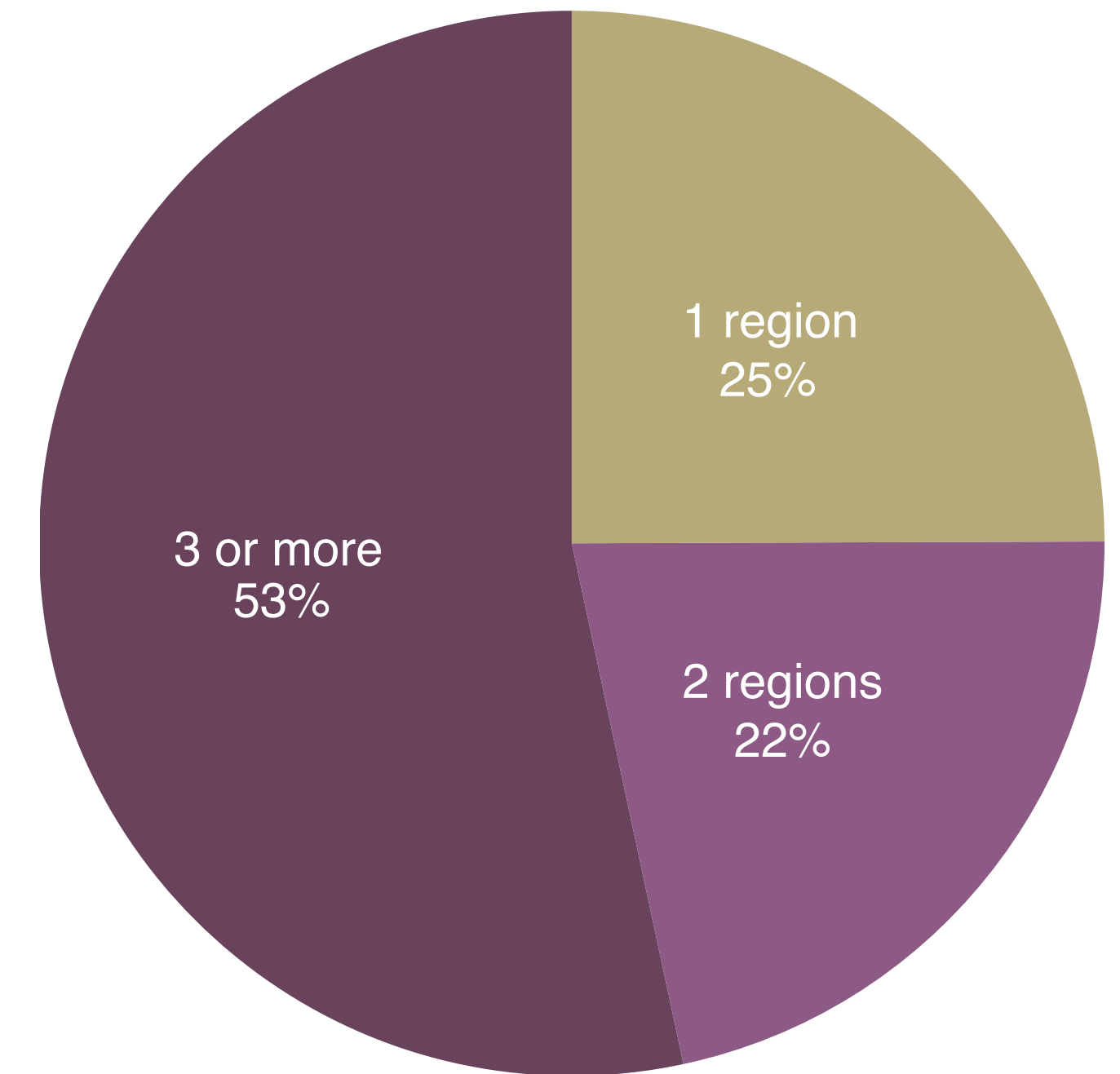
UK family/friends

clusters

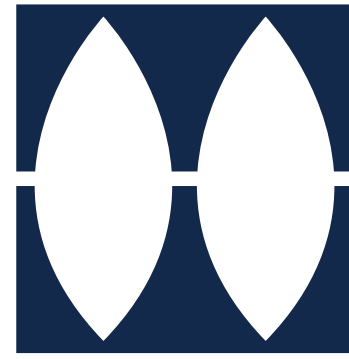
London



Number of search areas



Boarding
SCHOOLS
Show




BONAS MACFARLANE

- many UHNW internationals know far more than used to - second third generation wealth - though 50% know v little about UK education.
- new clients have heard of schools (friends) but want advice and academic assessments
- often late (eg for september this year) - have to come “now”
- more full relocations - coming younger so less starting with boarding
- increasingly see education as way to instil values in next generation (social/financial/ethical/ecological)
- Rise in numbers of highly mobile (eg Brazilians from Paris). Far more Americans. Expats from Lisbon



and finally



A world map with a dark blue background and light grey landmasses. Six red dots are placed on the map, each connected by a thin red line to a white rectangular callout box with a red border. The callouts contain the name of a city and a date. The cities are New York, Agents / Winter Fair, Monaco, Dubai, Singapore, and Bangkok. The dates are Saturday 10 May, Thursday 6 November, Saturday 22 November, Saturday 15 March, Thursday 20 March, and Tuesday 18 March respectively.

New York
Saturday 10 May

Agents / Winter Fair
Thursday 6 November

Monaco
Saturday 22 November

Dubai
Saturday 15 March

Singapore
Thursday 20 March

Bangkok
Tuesday 18 March

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](#)



- What attracts parents from China to consider British boarding schools?**
- ▶ UK education remains popular, and the UK education brand is strong.
 - ▶ Pre-Covid, there had been steady market growth in the number of Chinese students studying abroad over the past 12 years. The impact of President Trump's policies has been clearly visible over the past few years in the decline in Chinese students going to the US, meaning that the UK is picking up more parents who might have otherwise considered an American education. Other popular markets for Chinese students are Australia and New Zealand, Canada, South Korea and Hong Kong.
 - ▶ Chinese parents' minds are totally focused on league tables and the long term vision of how to get their child into a QS university (Oxford, Cambridge, UCL, Imperial College, LSE).
 - ▶ Pre-pandemic, boarding for younger age groups was rising, as parents look to improve their child's English and thus increase their opportunities as they move through the system towards university.
 - ▶ A key driver behind education growth overseas is the increasingly affluent middle class in China, with high-earning families prioritising spending on education.
 - ▶ There has been a massive growth in international schools in China (Harrow School has 13 campuses, Dulwich 9, Wellington College 6) – most with local partners – but there are some challenges. When Chinese parents choose an international school, they usually believe that it facilitates their child jumping into these schools in the UK. However:
 - their exam results are not equal (not as good);
 - pricing is similar to attending a school in the UK;
 - it is difficult to recruit foreign teachers (due to regulations and visas), meaning learning English is difficult;
 - there is no diversity in the classroom;
 - it is not the authentic UK experience.
 As a result, international schools do not have a large impact on the number/demand of parents who want a UK education.