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Behind the statistics: demand for UK school
education in East Asia

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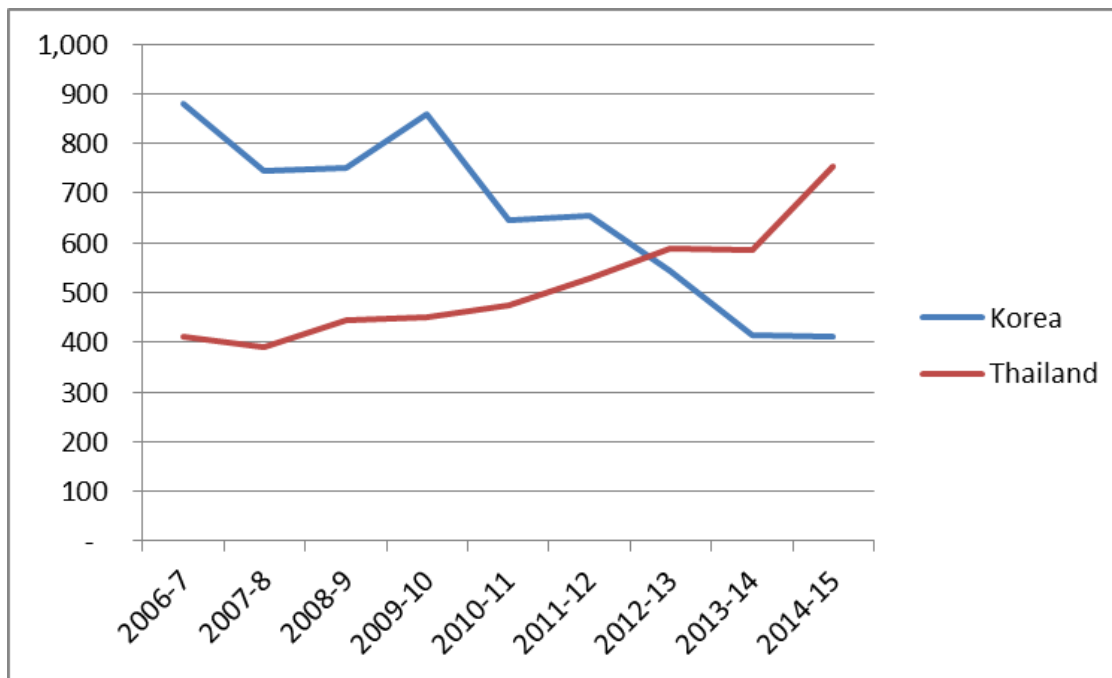
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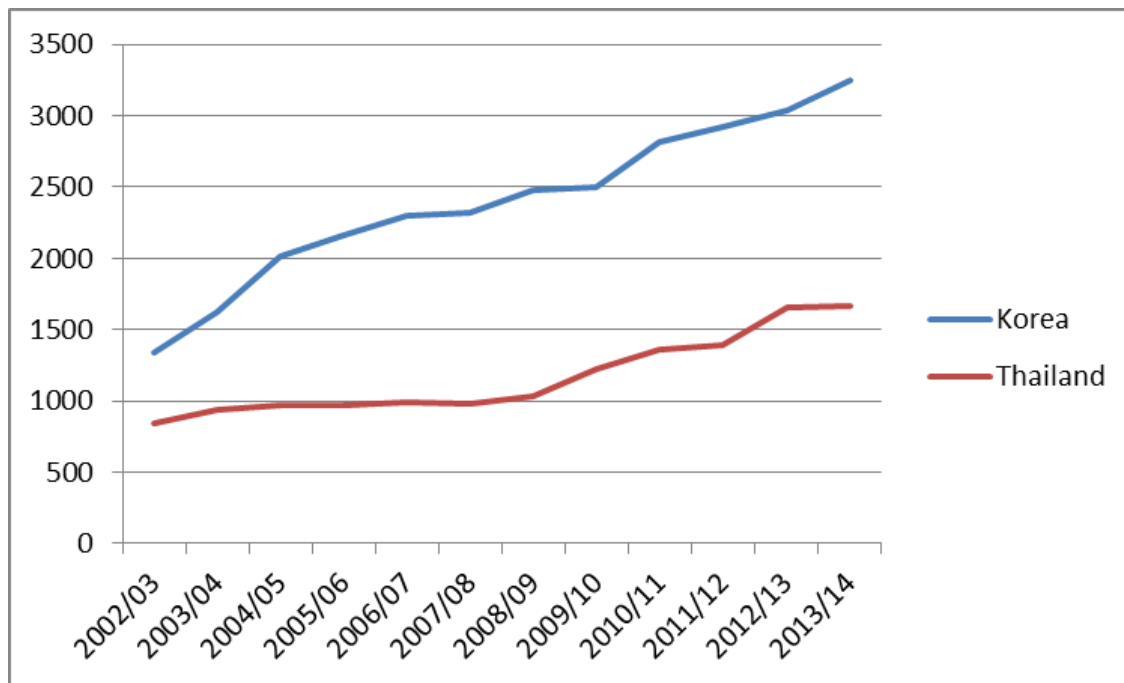
Trends

Total number of pupils in ISC schools (source: Independent Schools Council)



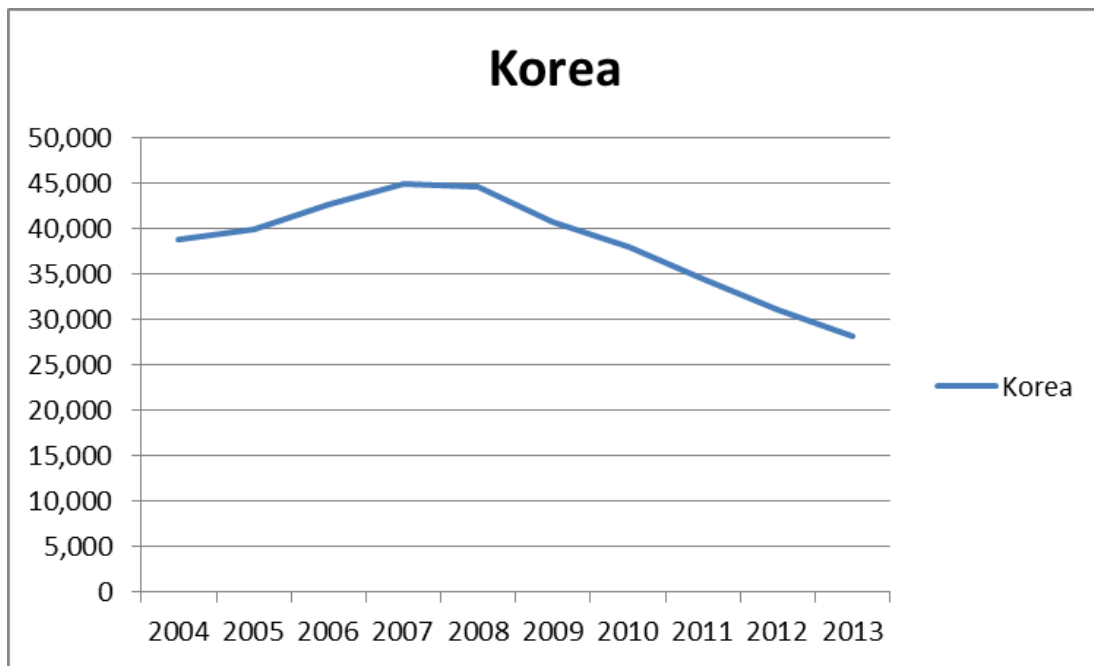
Trends

Total number of students in UK higher education at undergraduate level (source: HESA)



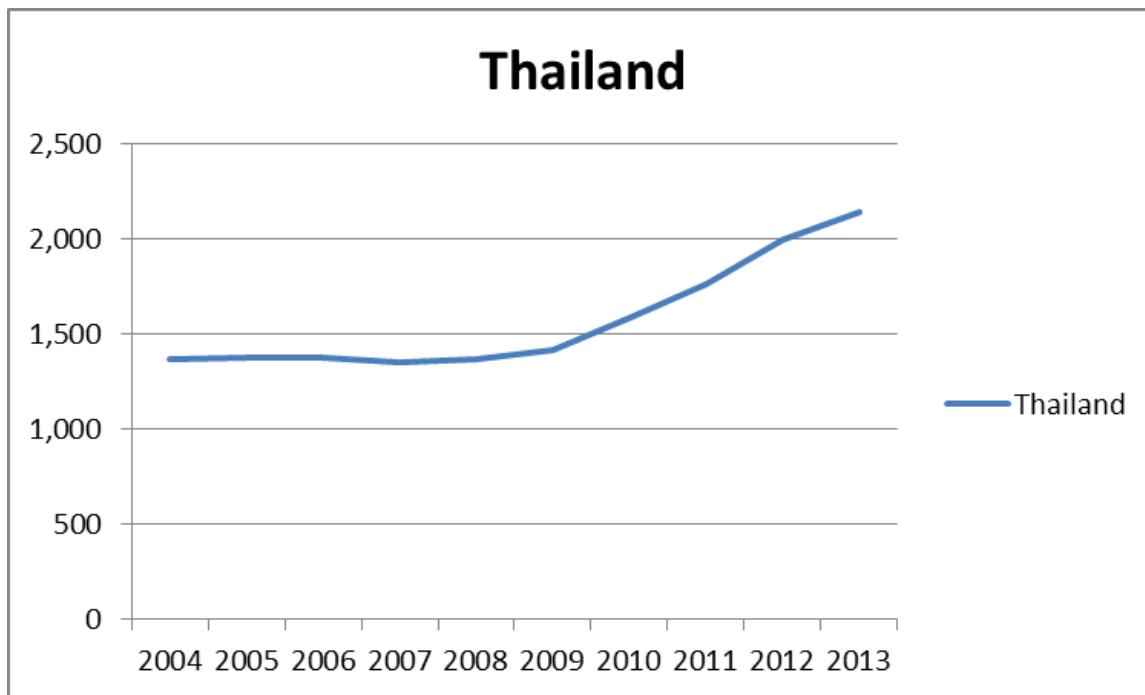
Trends

Number of students with a valid permit in calendar year, Canada, all levels (source: CIC)



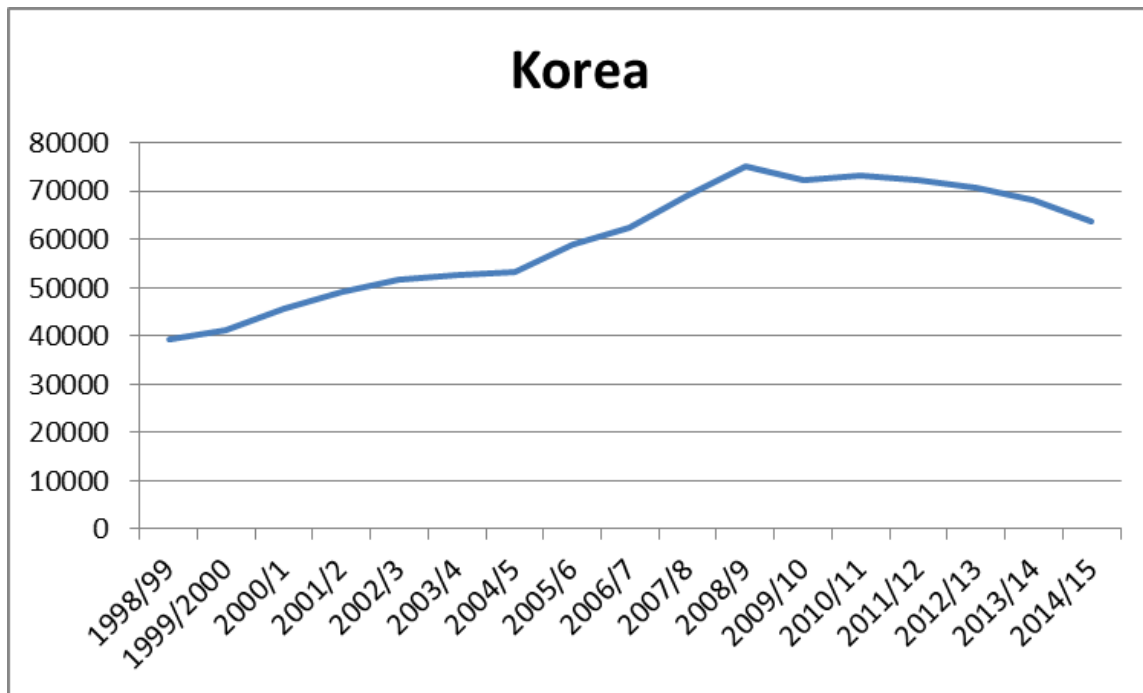
Trends

Number of students with a valid permit in calendar year, Canada, all levels (source: CIC)



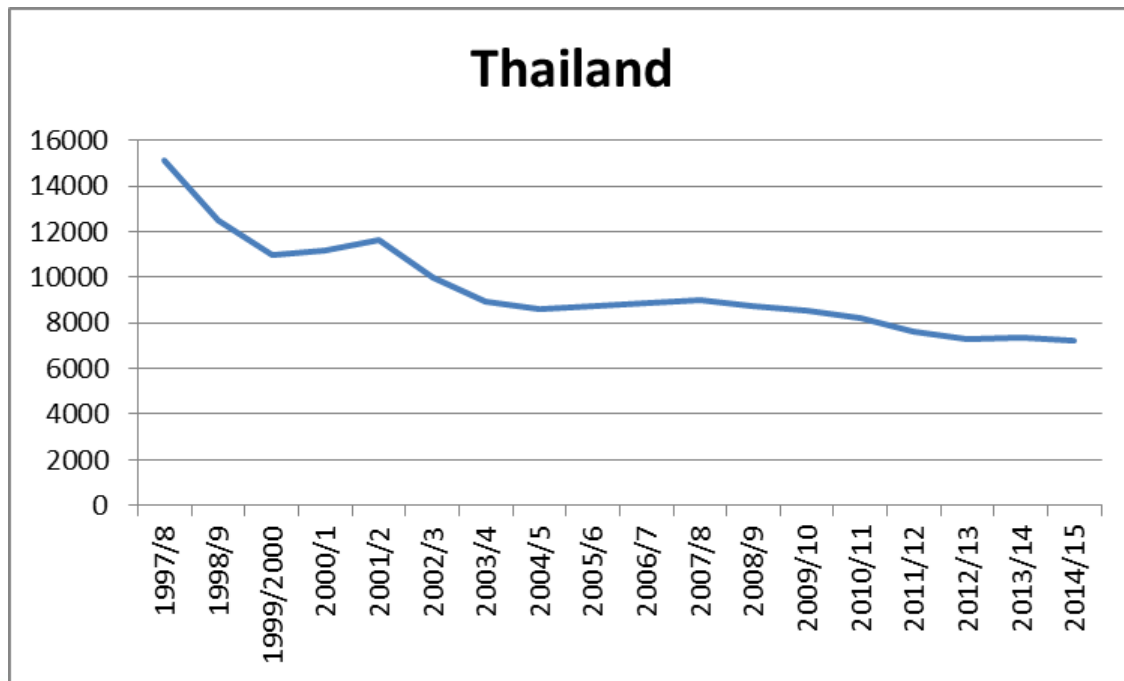
Trends

Number of students in US institutions (source: IIE)



Trends

Number of students in US institutions (source: IIE)



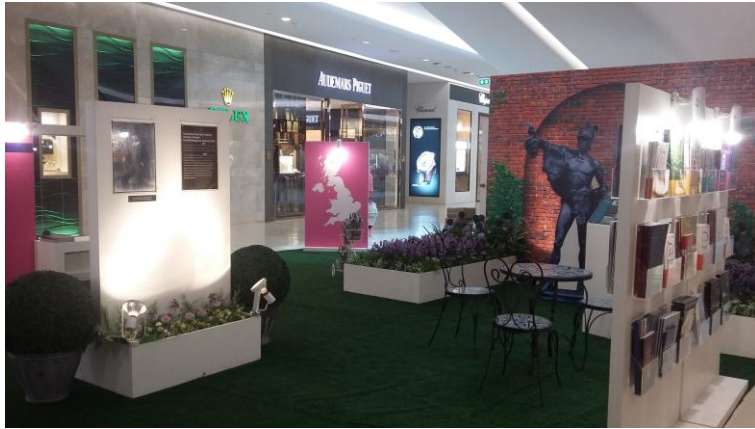
Trends

Summary

- Korea seems to be sending less students to English speaking destinations for higher education, with the UK being the exception to this rule.
- This trend is reflected in UK schools
- Thailand is sending more students to the UK and Canada at HE and schools level. Less students are going to US institutions.
- There is a stronger link between pre-university and university study in the UK amongst Thai students than Korean students.
- Where are Korean students going for pre-university study?

Thailand

Moving forward into the 5th Century of Thailand – UK Relations



Thai prime ministers who have graduated from the UK



**Kukrit Pramoj,
the 13th Prime Minister**



**Anand Panyarachun,
the 18th Prime Minister**



**Abhisit Vejjajiva,
the 27th Prime Minister**

Number of Thai students enrolled in schools abroad, 2013(-14)

Country	Enrolments 2013(-14)	Market Share
USA	611*	20%
New Zealand	1,336	45%
UK	585	20%
Australia	447	15%

* Excluding J-1 (exchange student) visa holders

Source: https://siem.britishcouncil.org/system/files/field/file/resources/El_Independent_School_data_2014-15_protected.xls

http://www.austrade.gov.au/ArticleDocuments/3510/2014_Basic_Pivot_all.zip.aspx

https://www.educationcounts.govt.nz/_data/assets/pdf_file/0007/149344/International-enrolments-in-NZ-schools,-July-2014.pdf

Growth: 2014(-15)

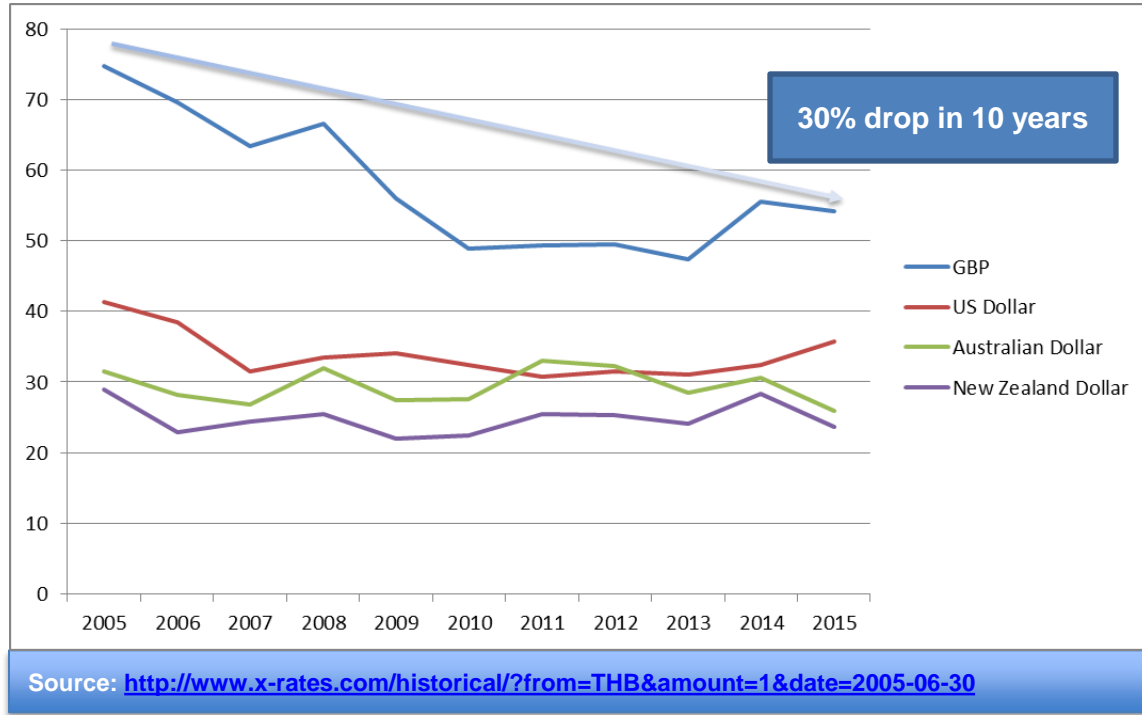
Country	Enrolments 2014(-15)	Annual Growth
Australia	423	-5%
New Zealand	1,371	3%
UK	755	29%

Source: https://siem.britishcouncil.org/system/files/field/file/resources/EI_Independent_School_data_2014-15_protected.xls
http://www.austrade.gov.au/ArticleDocuments/3510/2014_Basic_Pivot_all.zip.aspx
https://www.educationcounts.gov.nz/_data/assets/pdf_file/0007/149344/International-enrolments-in-NZ-schools,-July-2014.pdf

Insights from agents

- UK pre-university market is expected to grow further in the next 3 years
- Earlier start – better result!
- New sources of students: EP Programmes, bilingual schools, international schools in Thailand
- Entry requirements tailor-made to local context
- Integration programmes are invaluable to help deal with culture shock
- UK visa application process is not a problem – importance of updates and communication
- Exchange rate is positive to UK market

Exchange rate



Insights from agents

Australia	New Zealand	UK	USA
<ul style="list-style-type: none"> • Lower cost • Close to Thailand • Convenient transport to schools 	<ul style="list-style-type: none"> • Lower cost • Welcoming & Safe • Strong brand for young students • Good relationship with agents 	<ul style="list-style-type: none"> • High Quality • Strong cultural & historical background • A-level: very focused • Very popular in some areas e.g. Art 	<ul style="list-style-type: none"> • High Quality • Large variety of choices
<ul style="list-style-type: none"> • Lower awareness of historical, cultural strengths 	<ul style="list-style-type: none"> • Lower awareness of historical, cultural strengths 	<ul style="list-style-type: none"> • Higher cost • More complex entry requirements • Less willing to engage with foreign students 	<ul style="list-style-type: none"> • Higher cost • Weaker relationship with agents • More complex entry requirements

Budget

Country/ types of schools	Total budget (£)
Australia	Min 22,000
New Zealand	11,000 – 13,000
UK	Min 30,000
US	Min 30,000
International Schools in Thailand	15,000 (tuition fee only)
Bi-lingual / EP schools	4,000 (tuition fee only)

Source: Estimation by agents and school websites, exchange rate is £1 = 54 Baht

Top 3 priorities for Thai parents and students

- Reasons to study abroad : Immersion in English, quality of education, life skills
- How to choose a country : Quality of education, safety, immersion in English
- How to choose a school/ collage : Safety, opportunities to mix with local students, accreditation by a recognised organisation
- How to find information: Go online, attend seminars or education fairs, contact educational agents

Source: A survey with 126 parents and students interested in pre-university courses in November 2015

Thai parents and students

- Nearly 50% agreed that 14-16 is the most appropriate age range to start studying abroad
- 60% intend to apply to schools through educational agents

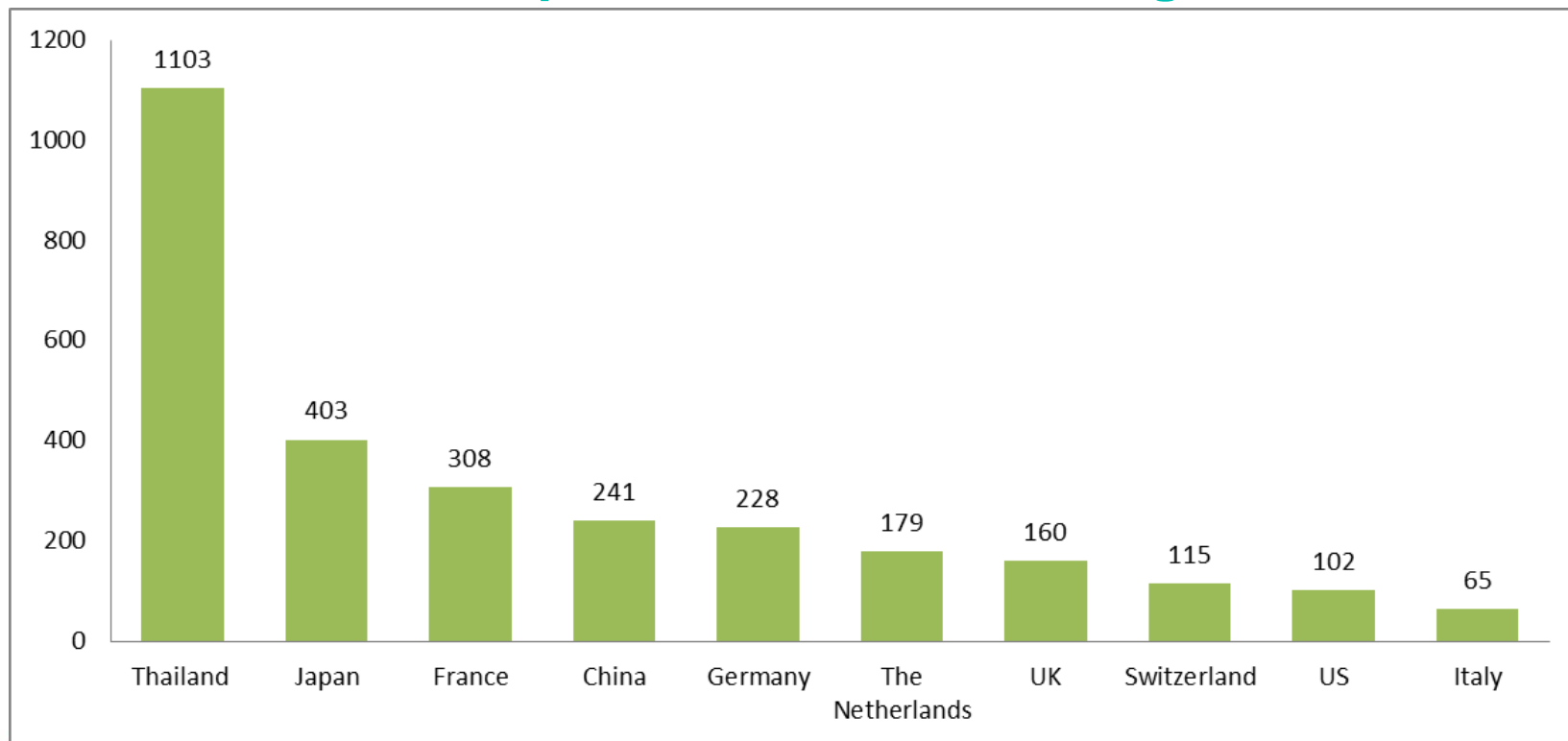
Source: A survey with 126 parents and students interested in pre-university courses in November 2015

Thai government scholarships: ODOS

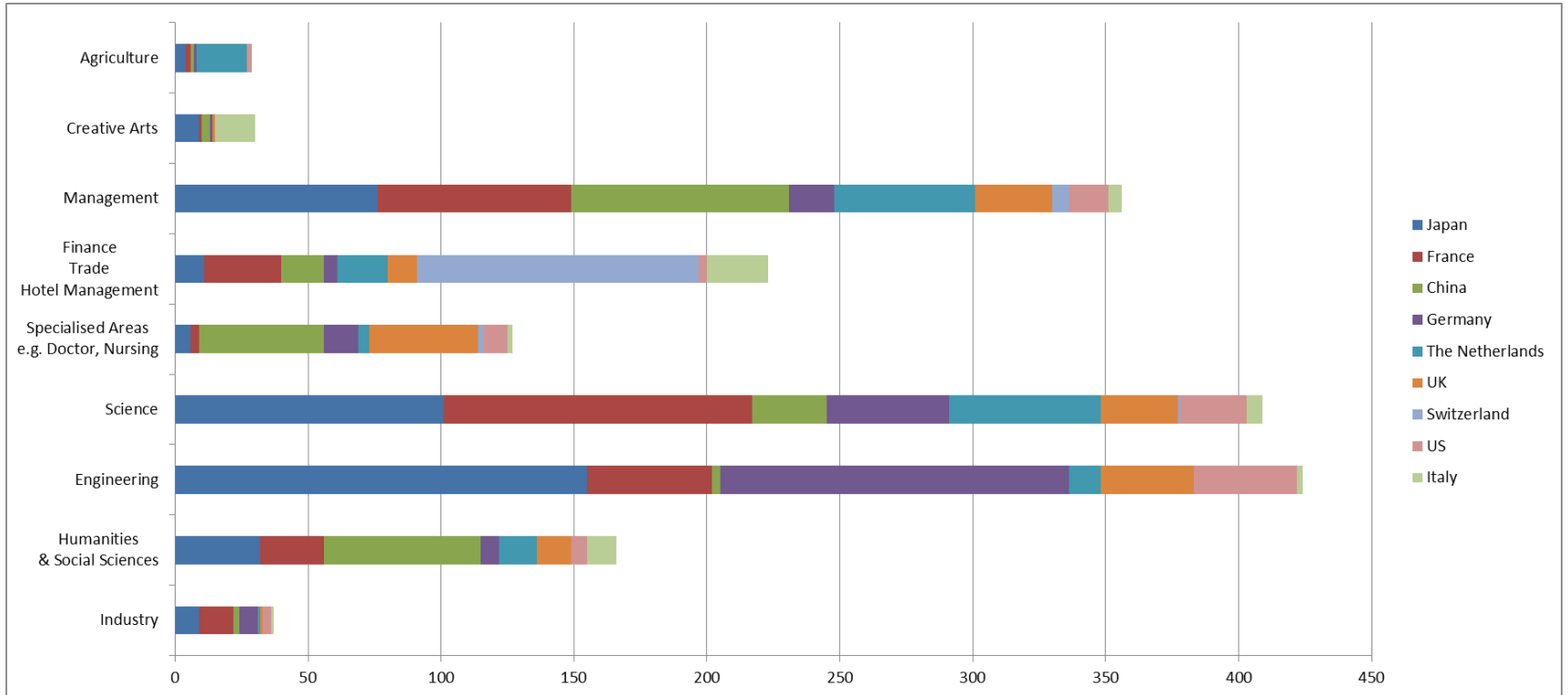
- One District One Scholarship
- Approximately 900 scholars/batch to study in 47 countries for a first degree
- Expanded to English speaking countries in Batch 3
- Available in different subject areas, focus on science



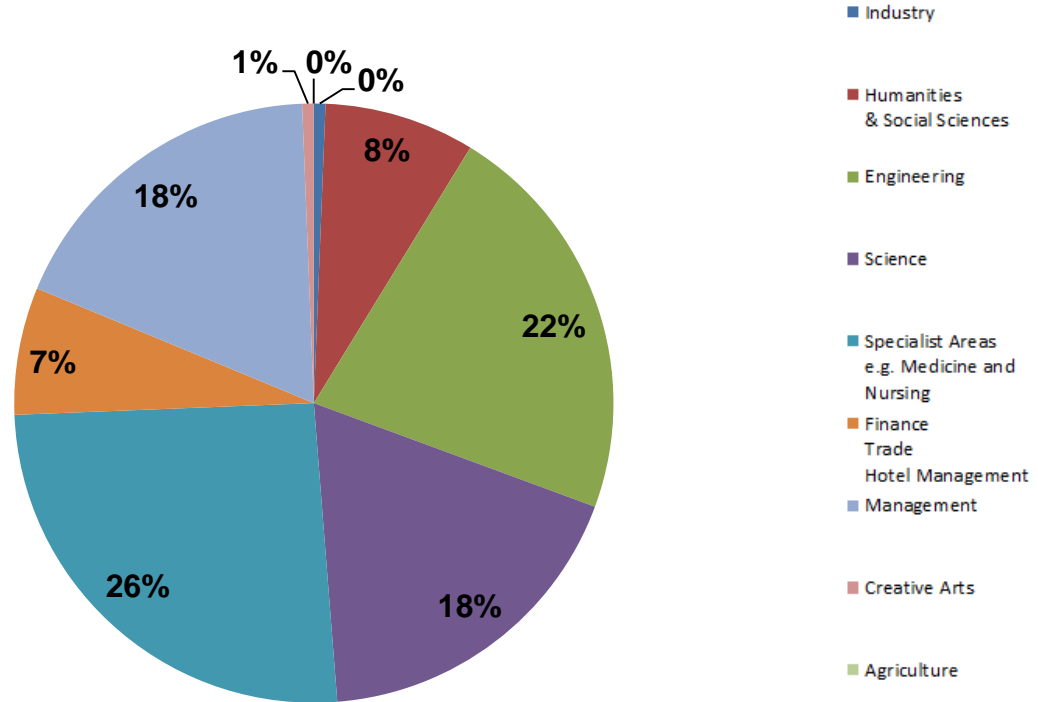
The UK is one of the top 10 countries receiving ODOS students



The UK is popular in specialist areas such as Medicine and Nursing



Number of students studying in the UK by subject area



British Council Events and Services

- Annual Schools and Colleges Fair - October
- Guidebook to Schools and Colleges
- Other Marketing Services



Summary & Recommendations

- Positive trend for UK market but also consistent growth in competing markets
- A good relationship with agents has to be maintained
- Emphasise safety, shorter course length, quality, recognition
- Develop on-line promotional tools and attend seminars/ fairs in Thailand
- Start with a short term English course
- Show the success rate of entry to university

Korea

Demographics



BUSINESS INSIDER UK

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South Koreans could be 'extinct' by 2750



Elena Holodny

Jun. 19, 2015, 4:15 PM 2,087

Many developed economies are facing demographic problems. But one case that stands out is South Korea.

Not only is the population aging (like in Japan and the US), but birthrates are also falling and women are increasingly less inclined to get married.

In 2013, the country's birth rate plummeted to the lowest level on record: Only 8.6 babies per 1,000 South Koreans were born, and the



Reuters/Kim Hong-Ji

Women wearing the traditional Korean Hanbok costume.

Economics

Education spend comes from household incomes

People have less disposable household income, but are still likely to invest in education

English language learning

Improving English language skills third most important reason for studying abroad, after cultural experience of living abroad, and better quality of education (source: British Council Student Insight survey)

Simplified entrance policy to special purpose high schools, especially foreign language high schools, has impacted demand for English language learning.

Employability

- Ministry of Education in Korea has placed restrictions on the English language education market
- Public and private providers have started to generate good alternative services to meet the demand
- Local universities are no longer allowed to offer preferable entrance to overseas graduates by law
- Employers are focussing more on skills and experience rather than provenance of education – British Council survey of HR managers from Top 25 companies
- This partly explains the data showing those dropping rates of number of students & visa acquired for US, Canada and Australia in Korea for the last 5 years

Employability

Number of kids studying abroad falls 63% in 8 years

Published: 2015-11-17 17:38
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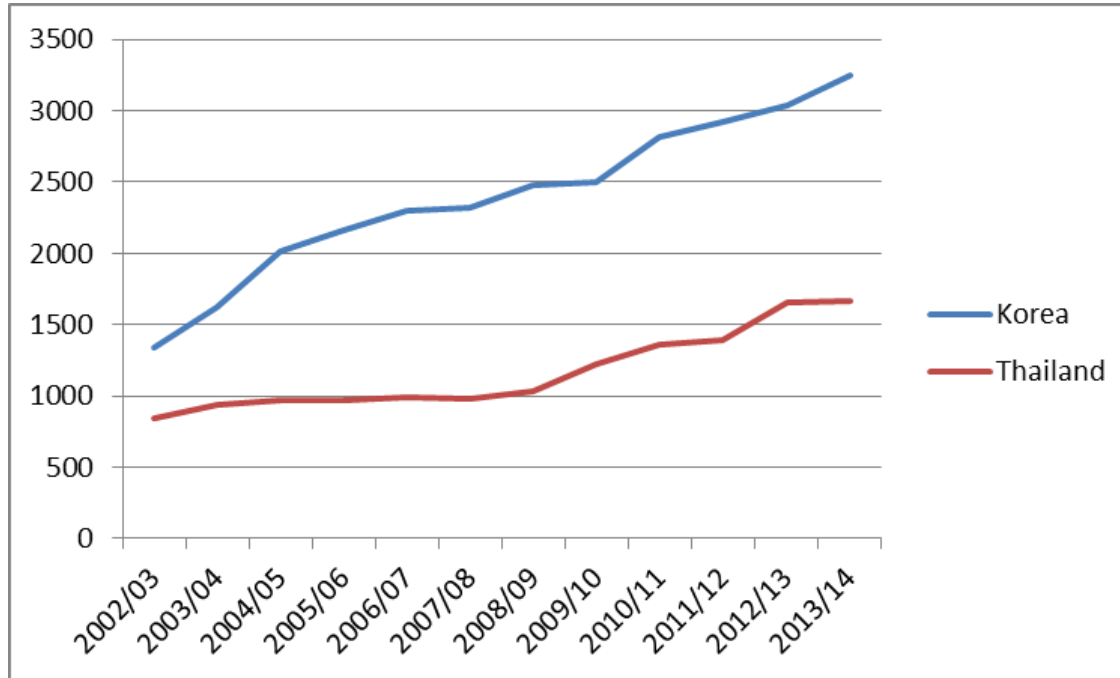
Yoon Jeong-sik, a 30-year-old who has studied in the U.S. for half of his life, has struggled to find a job in Korea. Having graduated with a bachelor's degree in political philosophy from a state university in California, Yoon has remained unemployed for almost two years since finishing his mandatory military service.

"I thought the applicant like me who speaks fluent English and has work experience would have little trouble getting a job in Korea," said Yoon.

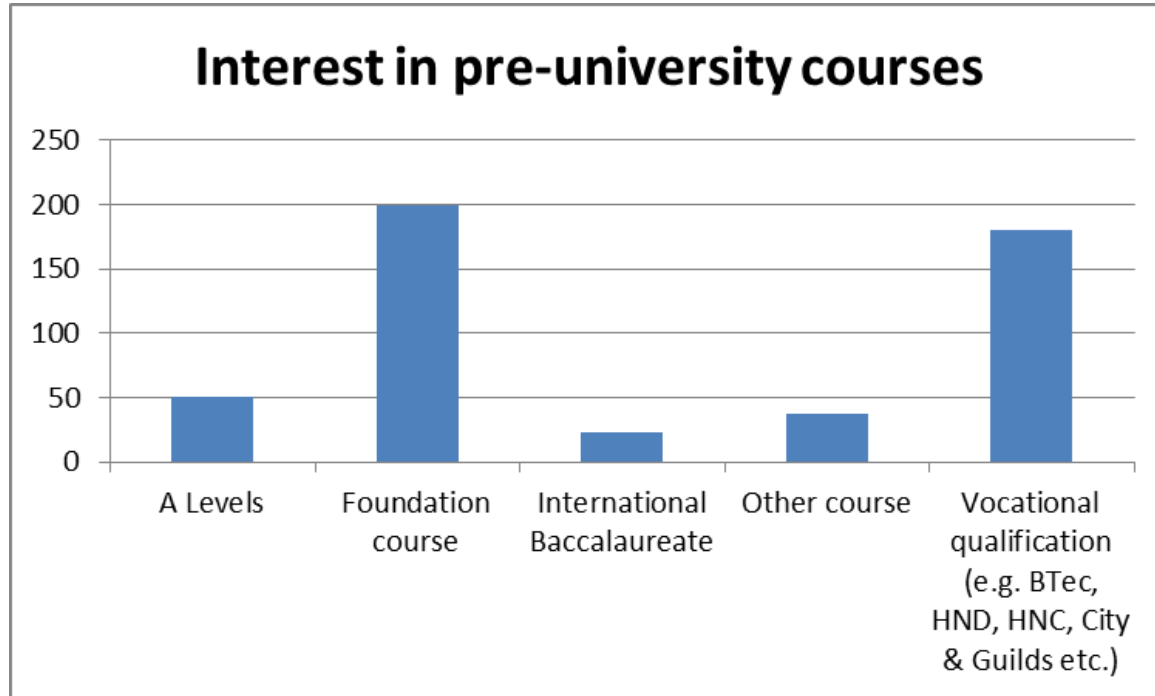
He applied to more than 30 companies, his confidence buoyed by the fact that he had received a "global education" in the U.S. since he was in elementary school. "Now I am afraid that my 15-year endeavor in the U.S. will come to nothing," he said.

Competition

Total number of students in UK higher education at undergraduate level (source: HESA)

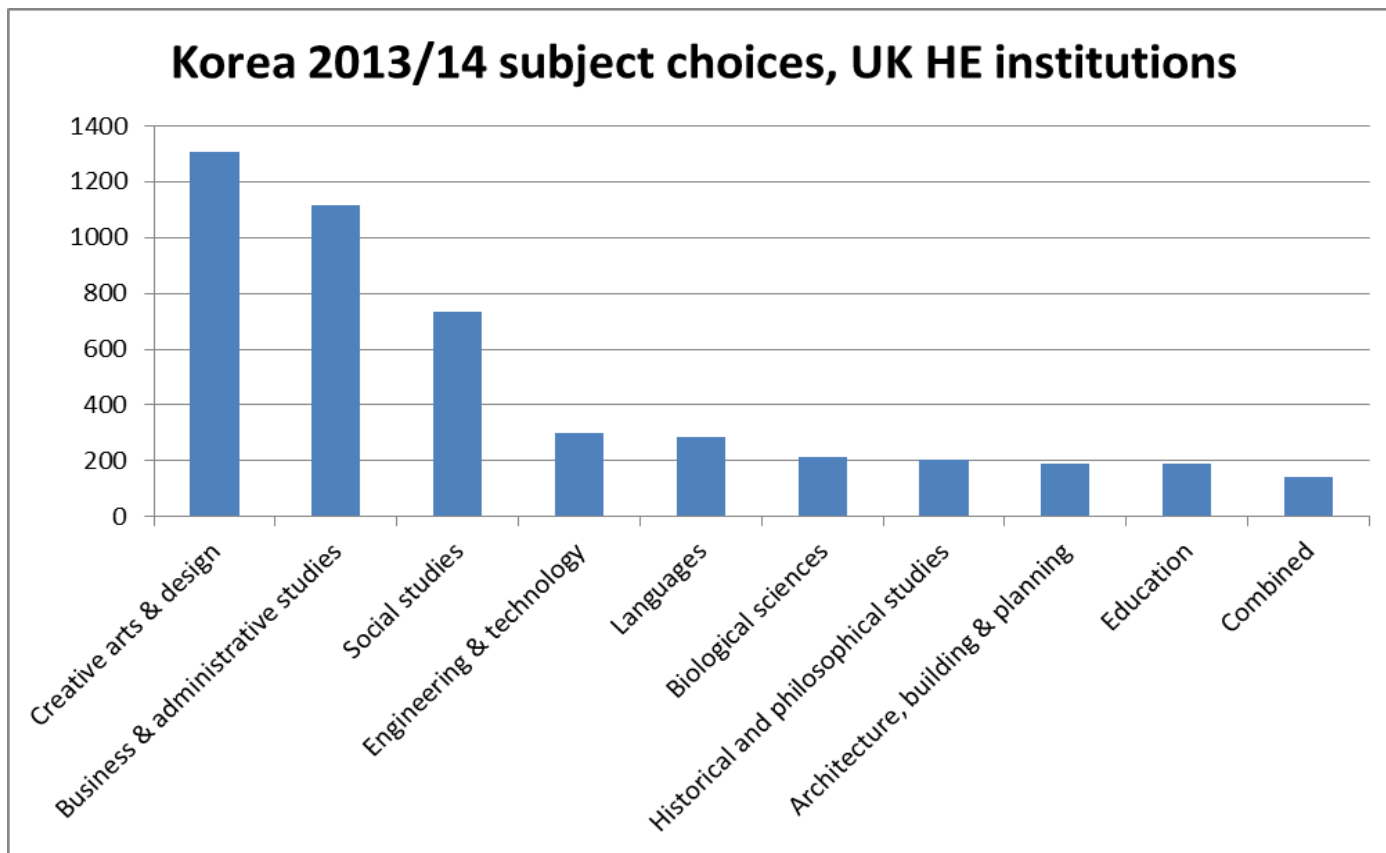


Competition



Source: British Council Student Insight Survey, 2007-2015

Culture



Source: HESA

Culture

Families are not seeing return on investment from pre-university study abroad

- 'Goose fathers' are a social issue in Korea and families now value family time more

Summary and recommendations

- The number of Koreans studying abroad is generally in decline
- UK higher education remains popular, but this is not translated into pre-university study in the UK
- Demographic decline, employability issues and a variety of other cultural factors means that demand for UK-pre-university education from Koreans will likely not increase over the next few years.
- Working with UK universities to highlight the value of pre-university study could be key to promoting the sector
- Specialist areas such as art and design should be promoted
- UK pre-university providers need to demonstrate the return on investment for Koreans