



SERVICES FOR
INTERNATIONAL
EDUCATION
MARKETING

CONFERENCE 2015

Behind the statistics: demand for UK school
education in Europe

Emma Robinson, British Council

Ailsa Kienberger, British Council

Carolina Jimenez-Sanchez, British Council

Elizaveta Utolina, British Council

#siem2015

www.britishcouncil.org/siem

Sponsored by



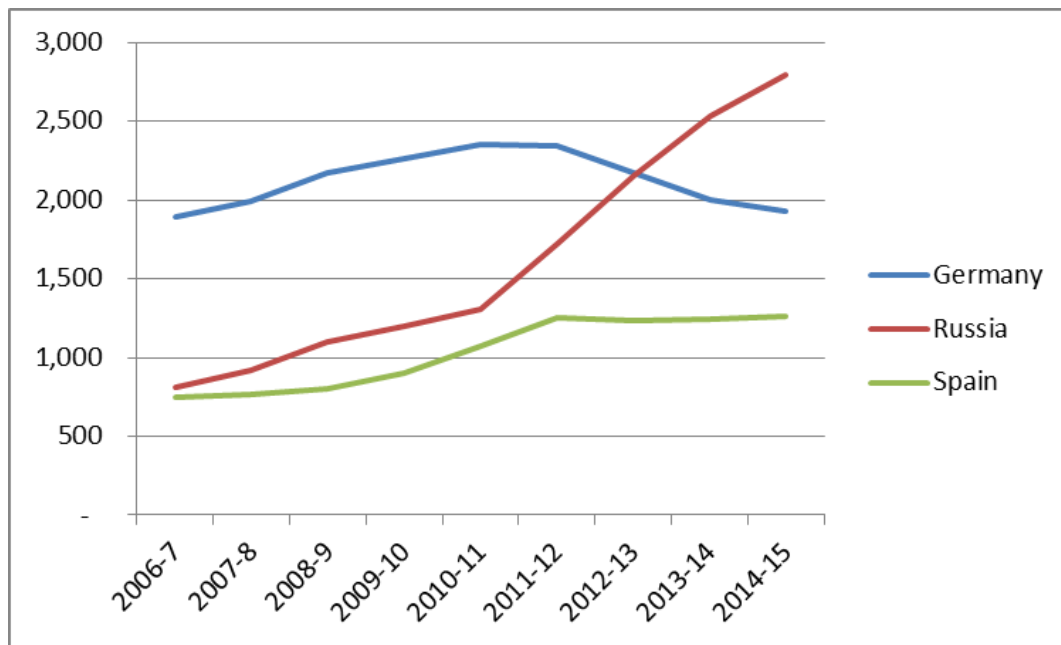
D.J.G. EXHIBITION FREIGHT SERVICES LIMITED

GeoXoLabs



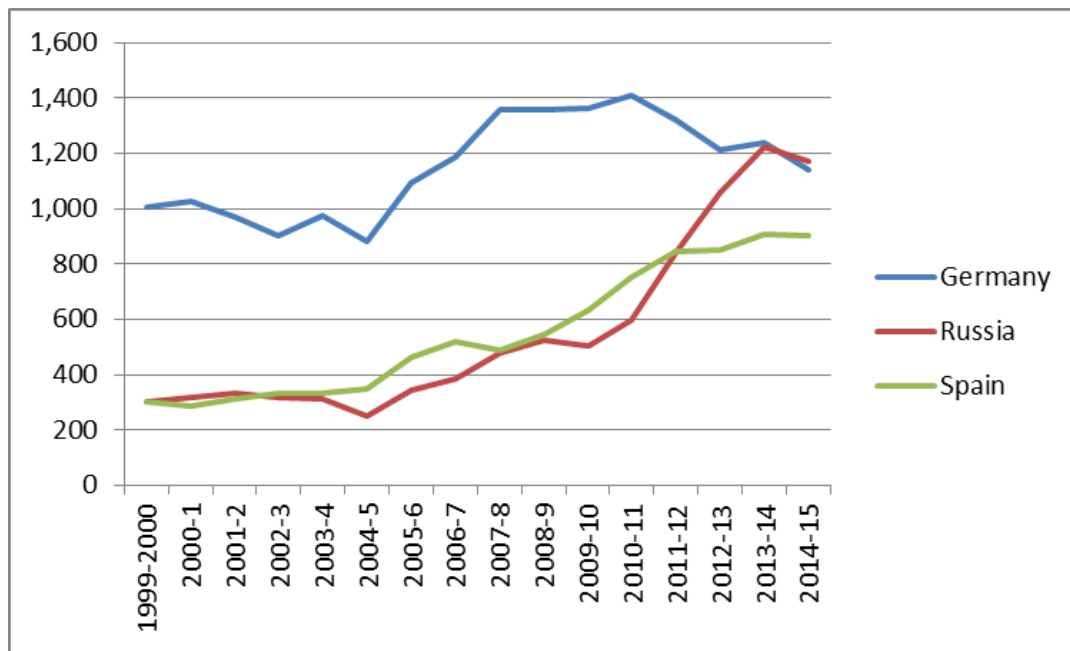
Trends

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



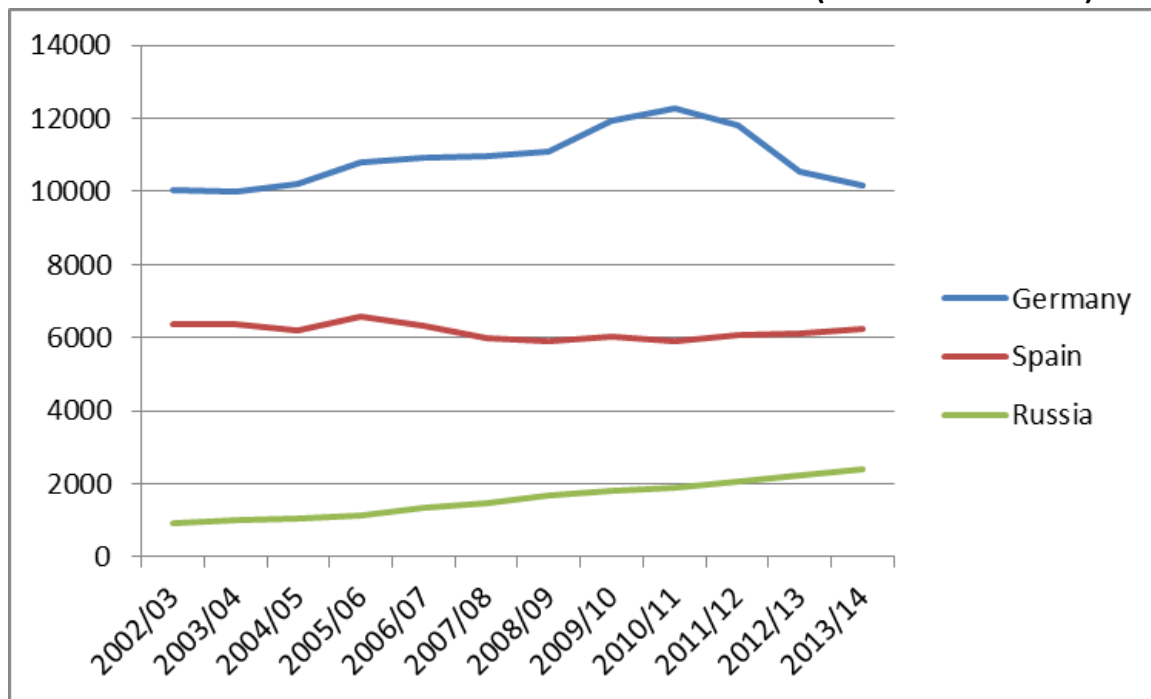
Trends

New pupils in ISC schools (source: ISC)



Trends

Number of students on UG courses at UK HE institutions (source: HESA)



Trends

- Germany and Spain are not showing any growth at HE or pre-university level in the UK.
- Russia has shown some growth at HE and pre-university levels.
- There is some relation between HE and pre-university trends

- The declining markets may result in increased competition amongst UK schools for the same number of students

Russia

Russia: background

Economic decline

Inflation 11%

GDP growth -4,6%

Weak national currency

Political tension

Safety issues

Lack of consumer confidence

1500 Russian pupils in UK boarding schools
(2014)

Restructuring of local school system
Education is still on the top of agenda

English language

Digital

Total of 550 private schools – about 50% located in Moscow

Fees in Moscow private schools per month: 400-700 GBP (with current currency rate)

Russia: trends

Education agencies report a decrease (up to 35%) in number of Russian pupils sent to UK schools plus some Russian students already enrolled are returning to Russia

Market is price sensitive so strong competition from EU where British curriculum is taught

Only upper class can pay, middle class is out of the game

Despite the economic situation Russia has a potential for growth: Moscow, Ural region, Tatarstan.

Russia: Why choosing a UK school?

Level of education in UK schools is perceived N 1

USPs:

High academic standards

Cultural environment

Pathway to UK HEIs (growing competition from sixth form colleges)

Individual development path for children

Creativity

Competencies in demand: leadership, teamwork, self awareness

Ratings

Schools foresight and mission: preparing successful person for the future world

Russia

Marketing Opportunities:

2016 UK-Russia Year of Language
and Literature

Russia National School Olympiad

Digital content in Russian

Work with Russian education
agencies

Long-term strategy

Germany – 16 federal states



Germany

Population: 81.2 million

2014/15 11 million school age students (-250k -2012/13)

2014 333,072 Abiturienten (A level students)

2014 1.4 million in vocational training

2015/16 2.8 million HE students

(Destatis)

3 possible reasons for the decline

1. Reduction of school years

- Abitur at 18 or 19
- traditional year to go abroad missing

2. Higher Education access - recognition

- A levels often not sufficient
- IB
- German Universities – more English Taught Programmes
- Little/ no tuition fees

3. Competition

- US biggest competitor– state schools
- Australia and New Zealand also attractive
- More international schools/ European schools in Germany
- Few/ no other German students preferred

Spain – a profile of a country

SCHOOLS

Overload

MUST English

Family vs Boarding

Classist society

Self-critical



MARKET

Big & growing

Ireland, USA, Malta

AGENTS or Direct?

Rich are wealthier

How to market in Spain?

- Upper classes
 - Private schools in Spain?
 - Wealthy sport clubs?
 - Alumni? – exfamilies?
 - Agents
- Word of mouth works (alumni?)
- UKTI– Ambassador’s residence



www.elmundo.es/mejores-colegios.html

www.Cicae.es

www.Scholarum.es

If interested in opening up a school in Spain please ask

Discussion