

# INTERNATIONAL EDUCATION SERVICES CONFERENCE 2018

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China's booming private international school market:  
understanding and capitalising on the growth

Sponsored by

- I. International school types
- II. Growth trends
- III. Capitalising on growth - recruitment
- IV. Capitalising on growth - partnerships

# Types of International School

Type of International School	Source of students and restrictions	Comments
<b>Schools for expatriate children</b>	Only non-PRC citizens except Taiwanese, Macanese and HK residents, allowed to deliver full foreign curriculum.	Includes a lot of the 'high-end' international schools. Good recruitment potential as all students will study abroad.
<b>International programmes within public schools</b>	Chinese citizens outside the range of compulsory education (mainly Grade 10-12 students)	These programmes teach an international curriculum. Usually at the upper secondary level as the law states that students must follow the domestic curriculum at the primary and lower secondary levels. The numbers are unlikely to grow due to change in policy.
<b>Domestic private international schools</b>	Chinese citizens outside the range of compulsory education (mainly Grade 10-12 students)	Rapid market driven growth since 2010 – rising Chinese middle class who want a Western education and avoidance of Gaokao pressures. Growth to continue.

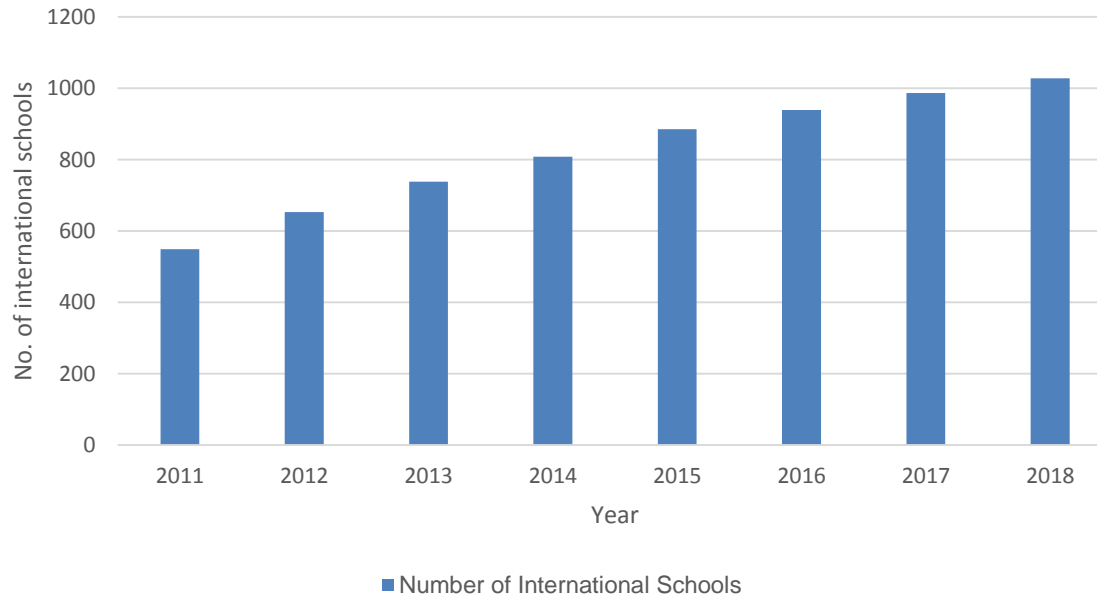
# Private education law

- “Non-profit” private schools allowed across all levels of schooling
- “For-profit” private schools allowed at other levels of education, including pre-school and senior high school
- Overall government support for “for-profit” education at non-compulsory levels and “non-profit” education at all levels

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# Overall growth

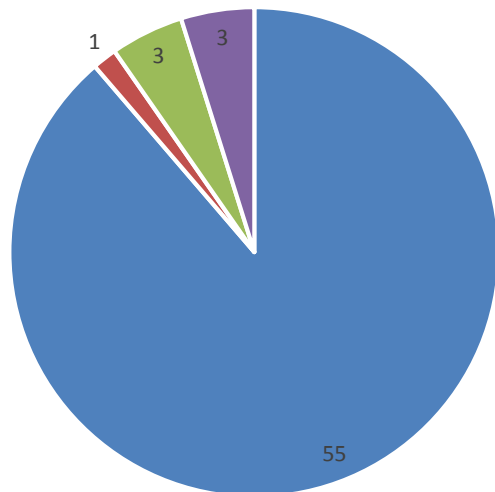
Total international school growth in China 2011-2018



Source: 顶思TopSchools

# New growth

New international schools in China 2018



■ Domestic private international schools

■ Chinese public schools with international departments

■ Schools for expatriate children

■ Other

Source: 顶思TopSchools

## Size and tuition



430,000 students

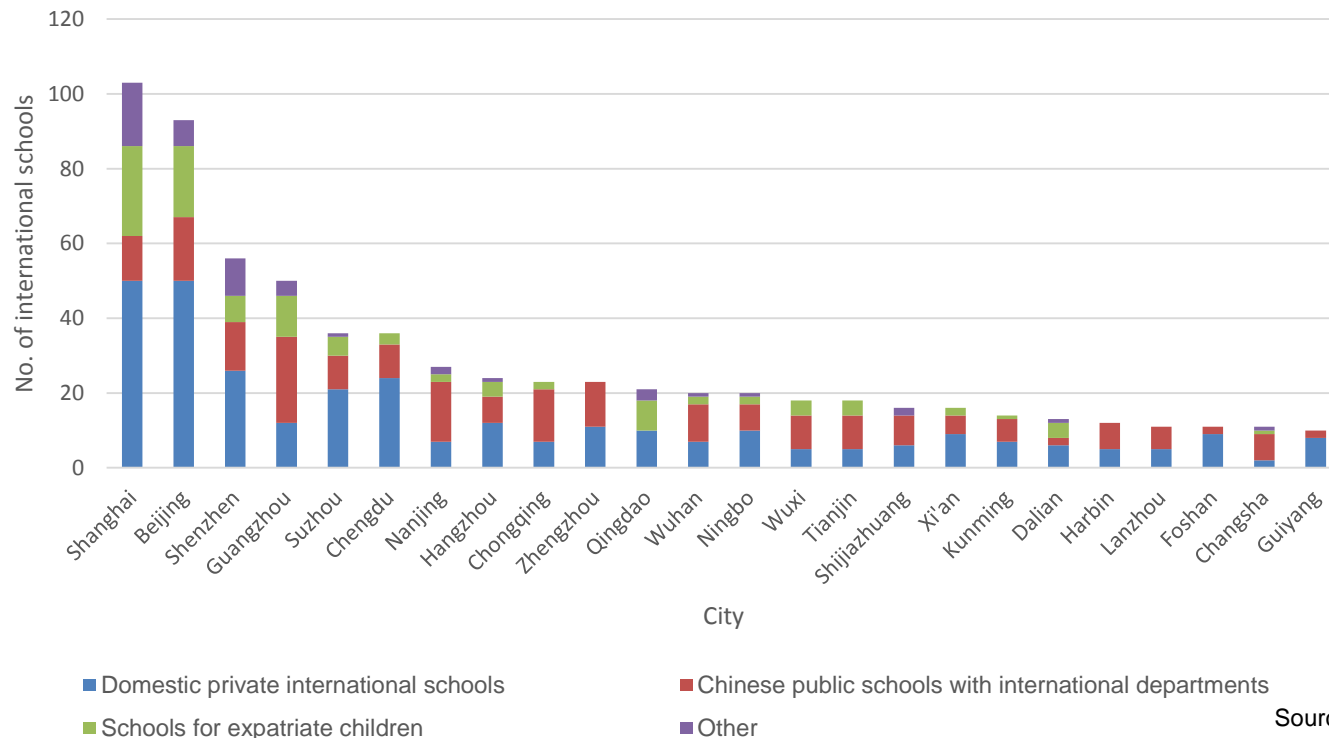


Tuition fees over USD 6 Billion



# Current locations

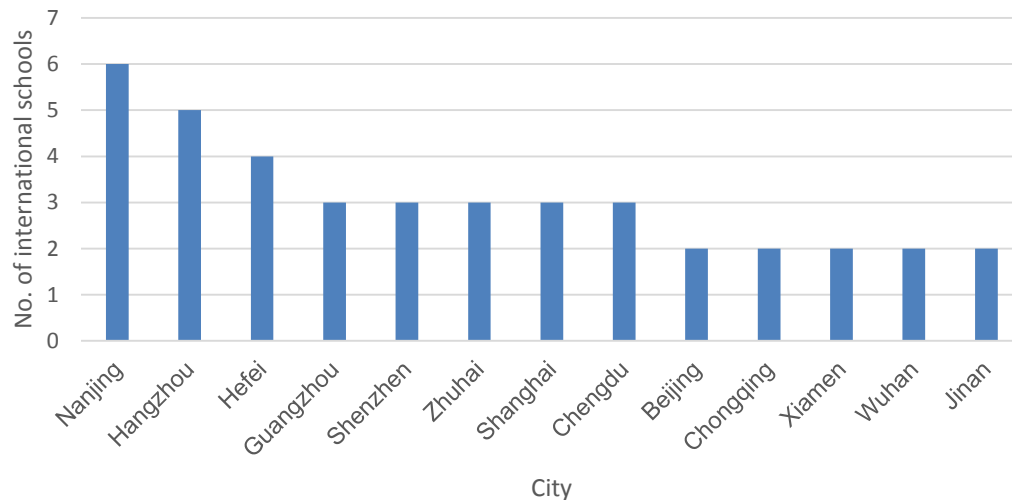
Total international schools by city 2017



Source: 顶思TopSchools

# Future locations

Proposed new international schools by city  
2019/20



Source: 顶思TopSchools

# Curriculum

- Top 5 international curriculum in China are:

AP, IBDP, Cambridge International, Pearson Edexcel and GAC-ACT

- The US curriculum is the fastest growing and most prevalent

- Other fast growing international programmes include:

BC (Canada British Columbia), VCE (Australian Victoria Curriculum), WACE (Western Australian Curriculum) and Oxford International AQA

## Why growth?

- ✓ Increasing growth of middle class
- ✓ Demand for 'international' quality education
- ✓ Dissatisfaction with China's public education system
- ✓ Pressures of the Gaokao
- ✓ Restrictions on international-curriculum courses offered at public high schools

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# Recruitment

Choosing an international school essentially locks students out of local higher education therefore students are all looking to study abroad.

# Recruitment

Key factors to consider:

1. Location
2. Target audiences

# Location

Questions to consider:

- Where are your current students coming from?
- Where are your existing wider partnerships (TNE, articulation etc.)
- What are your subject area strengths?



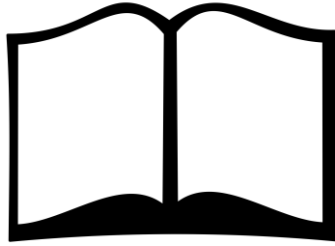
# Target audiences

1. School counsellors
2. Students

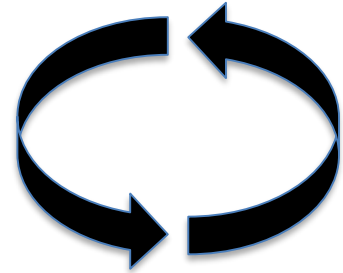
# School counsellors



Identify



Educate



Update

# Students



Generic sales pitch

V



Faculty led experience

# Students



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# Partnerships

1. Teacher training, curriculum development etc.
2. Student exchange
3. Private education investment groups

# Challenges

1. Managing resources
2. Ranking / positioning
3. Quality of student
4. International competition
5. Regulatory environment

# Conclusion

- Opportunities to explore
- One area that needs to be tied into wider recruitment and partnerships strategy
- Roll with it or revolutionise?



# Thank you

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