



BRITISH
BOARDING
SCHOOLS
NETWORK

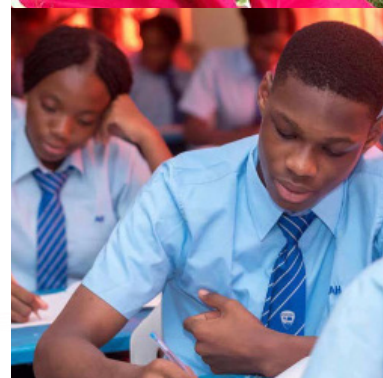
International Markets' Update

March 2024

Contacts • Knowledge • Support

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Introduction

The British Boarding Schools' Network (BBSN) is committed to keeping our school members up to date with relevant market intelligence to inform their international recruitment strategy.

The combined effects of Covid, Brexit, wars and current world political and economic instability have all contributed to changing the global landscape for international recruitment. This report shares valuable market updates which have been gathered between September 2023 and February 2024 from our global network of 440+ Approved Agents who are recruiting pupils for British boarding schools from more than 50 markets.

In this document we have signposted to a rich library of resources and recorded webinars that are available via the members' portal in the Knowledge Hub. Should you require a login to the portal or assistance in finding further materials, please do not hesitate to contact our Members' Support Team at: support@britishboarding.com

We hope you find this document useful and we encourage you to share it with senior leaders and governors at your school.

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Executive Summary: International Market Insights 2024

Boarding communities are becoming more diverse

- The BBSN data from our member schools shows that in 2018, 77% of all international boarders came from the top 10 markets. In 2024 this had reduced to 69% (a decrease of 8%).
- In 2018, the top market – China - made up 27% of all international boarders in our member schools. In 2024 this has reduced to 19% (down 8%).
- These figures show that schools are reducing their reliance on a small number of markets. The pandemic showed how risky this can be.
- We have a number of very dedicated agents in newer and emerging markets such as Chile, Brazil and India who, since the pandemic, have been working hard to open up their market, educating families about opportunities in the UK.
- However, it is notable that whilst we have witnessed a lot of activity from member agents and schools in the last 2-3 years in newer and emerging markets, almost 70% of international boarders are still coming from the top 10 markets. It is a reminder that; it takes time to open up new markets and build partnership with agents; it is a long-term strategy, so expectations need to be managed; and schools need to ensure that they are making informed decisions about where they want to diversify to ensure a good return on investment.
- We encourage schools to make good use of the resources available via our members' portal and the one-to-one support our team can provide to ensure they have a targeted approach to creating diversity in their boarding.

UK remains strong as a study destination

- A British boarding school education is still highly regarded, and the UK is still the No.1 desired destination for many international families.

Increased demand for short term stays and summer schools

- Since Brexit, with the introduction of visas for EU students, European families have been put off by the extra costs and application process. As a result, short-term stays under six months, which do not require a visa, have become more popular.
- There has been a significant increase in summer school interest, not just from our closest neighbours in Europe, but also from Romania, Poland, Serbia, and further afield from Kazakhstan and China.
- Agents require partner schools to be flexible and adaptable to work with them to offer short term stays and immersion programmes to re-open markets and open up new markets. Parents see these as a 'training route' to longer term study programmes.

Increase in demand for Prep Schools

- Agents from China, Hong Kong, Japan and Thailand have seen an increase in demand from parents sending pupils at a younger age (sometimes with one parent accompanying the child at prep school age). This will be good news for prep schools as we have witnessed an increase in the number of prep schools actively recruiting international boarders and becoming members of BBSN.

Affordability is an issue

- More agents are mentioning affordability as an issue for families, with the current downturn in many countries' economies, poor exchange rates and increasing school fees. Agents and international families are very aware of the possible addition of VAT on school fees, and it has already received negative national press in Germany.
- As more schools look to recruit overseas to mitigate against the potential impact of VAT on school fees, they should be aware that international markets are not one homogenous group and that many markets are being affected by devaluation of currency and economic issues.
- The concern over the cost of school fees is creating more competition for British boarding schools. International families seek more affordable options, and agents report that many families are looking at international schools and those offering a British curriculum across European countries.

More challenges for agents

- With more options available as routes to higher education, agents' roles are becoming more demanding and sophisticated as they help families to navigate the best options (from prep school to university) to reach their end goal/chosen career.
- Many agents who have traditionally recruited from Russia and Ukraine have chosen to move out of their home countries to Europe, USA, UAE and Turkey. They have been working hard to support displaced families and to diversify into a wide range of countries to be able to continue their businesses.



BBSN Top 30 International Markets

Within the Knowledge Hub on the [BBSN members' portal](#) you will find the Top 30 International Markets for British boarding schools. Data on all tabs, apart from the ISC Data tab, is a **live feed** from the international boarders recorded in our member school profiles. It represents more than 20,000 pupils in our 270 member boarding schools.

You can see the top markets for:

- all schools,
- girls' schools,
- boys' schools,
- prep schools.

The 2023 ISC Census data is referred to in this document. The Independent Schools' Council (ISC) Census data is collected each January and published in May. You can see how their top markets compare with our members' data. However, the ISC data does not break down every country and many of the markets are grouped into land masses, so using our member data alongside it provides a more comprehensive picture for targeted marketing.

In the 2023 Census there were 25,469 non-British pupils whose parents live overseas. International boarders in the [BBSN member schools](#) account for 80% of these pupils, so our data is robust and can be relied upon as a strong reflection of the current overall picture of international boarders in British boarding schools.

Prep Schools Top 30 Markets



Boys' Schools Top 30 Markets

Girls' Schools Top 30 Markets

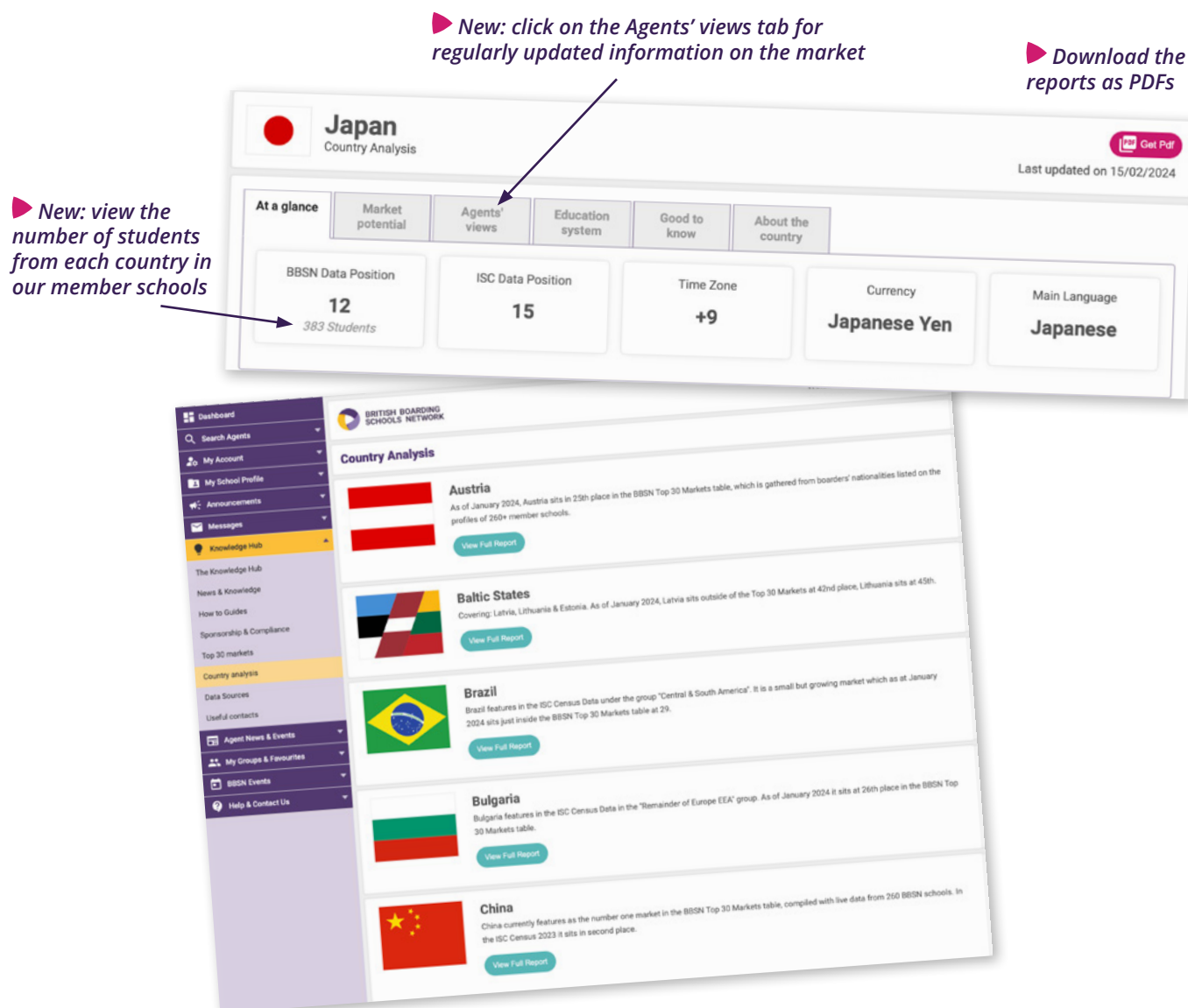
Country Analysis

For more detailed information, go to the Knowledge Hub on the [members' portal](#), where you will find individual country reports which contain a wealth of up-to-date information to help you to make informed decisions regarding your international recruitment strategy.

Click on each of the individual tabs to find detailed information on:

- **Market potential:** numbers of pupils and what families are looking for, enabling you to target your marketing accordingly.
- **Agents' views:** the very latest comments on the market from member agents, updated regularly.
- **Education system:** an outline of each country's education system, so you can understand how it differs from the UK and where the transfer issues are likely to occur.
- **Good to know:** tips for travel, visas and culture differences.
- **About the country:** insights into each country's geography, history, religion, economy and politics.

You can download all the above information in one PDF document for each country.



Update on the Top 20 International Markets

The following section is an update on the Top 20 International Markets to help our member schools understand the current state of play in key recruitment countries.

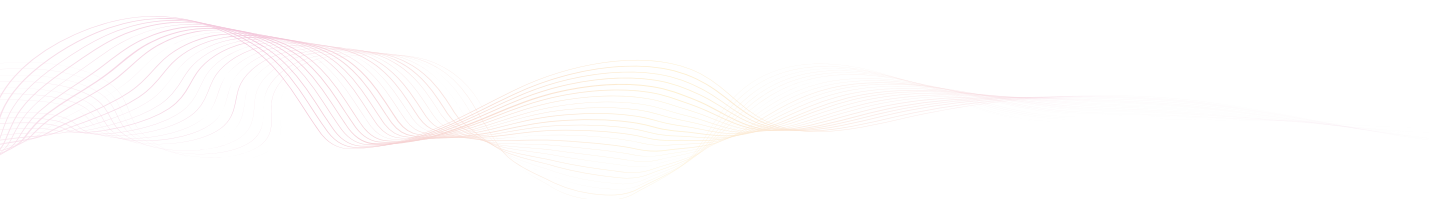
The information has been gathered from:

Member Agents:

- Review meetings with our global network of [Approved Agents](#), conducted via Zoom, by Jayne Grigg (BBSN International Recruitment Adviser) and Suzanne Rowse (BBSN Director). We currently have more than 440 Approved Agents in membership and more than 100 meetings were conducted between September 2023 and February 2024 as part of our agent review process.
- A survey of all of our [Approved Agent](#) members was conducted in September 2023 to gather market updates.

Member Schools:

- We currently have 270 [British boarding schools in membership](#). Each school has a profile on our members' portal which is visible only to our Approved Agents. The profiles provide the nationalities and numbers of international boarders in each school. From this data we have created a live feed of the Top 30 Markets on our members' portal in the Knowledge Hub. This currently represents more than 20,000 international boarders.
- The data for this report was collected in January 2024 when we had 265 member schools representing 20,484 international boarders.
- We also have data from our member schools from January 2018 (pre-Covid) and January 2022 (early post-Covid). Although our membership has grown by 60% since 2018, we have been able to compare the position of markets in the league table, and the percentage of the total comprised by the top 10 markets across these periods to identify trends.
- The BBSN data from 2018, 2022 and 2024 has been used to show the position of each of the top 20 markets on the following pages, compared to the market position from the ISC Census data. As the 2024 ISC Census has not yet been published we have used the 2023 report in this column.



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	18	11	10
ISC Data	19	17	19



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	1	1	1
ISC Data	1	2	2

China has remained the number one market for BBSN member schools, despite dropping to second position after Hong Kong in the ISC data since 2022. There are around 3850 Chinese boarders in our member schools.

China and Hong Kong combined still account for 35% of the international students in BBSN member schools. This has dropped from 42% in 2018, representing a drop in the Chinese market. However it does reflect that schools have been working hard to diversify their markets since the pandemic and reduce their reliance on the top markets.



What agents are telling us this year

- Demand from China is still increasing after Covid, with 2024 expected to be better than 2023.
- Enquiries are definitely up for younger students, and this is a growing market for Prep Schools.
- The Chinese government's policies on the learning of English in schools in China, and further restrictions on education and tutoring, mean that more parents are looking to educate their children abroad.
- More families are visiting schools in person before committing.
- Whilst the demand is there, worries about the Chinese economy mean that some families are being more cautious about making decisions on when to send their children to the UK.
- Summer school (and winter school) business has grown considerably, as have short-term stays, particularly for younger pupils, as families see this as a 'training route'.
- GCSEs and A levels are still popular, with many pupils joining in Year 9.
- The UK is still the favoured destination. However, some students are keen to attend US universities and they need schools to be able to prepare them for this route.

- There has been an increase in Chinese students applying from outside of China, including families who have moved to Singapore and other SE Asian or European countries.
- Whilst ranking tables still play a large part in school and university choice, since Covid parents are also concerned about mental health, obesity and device addiction.
- There are more applicants with lower levels of English (as English teaching is less prevalent in China's school curriculum and there are fewer English teachers).
- Agents are receiving more enquiries from middle class families who are now considering education outside of China to give their children a more competitive advantage.

“It's as if parents cannot wait to send their children away now as everything has opened up again since Covid.”



Contacts

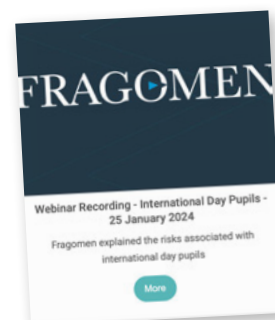
Most Chinese students arriving at UK boarding schools will have come through agents and we have 117 BBSN member agencies recruiting from China. There are a huge number of education agents throughout the main cities in China and the numbers are growing. However, their credibility and expertise in the UK boarding sector varies significantly, so it is important that schools work with trusted and experienced partners. At BBSN we are very careful about selecting new agent applicants from China. We advise schools to do their due diligence when working with unknown agents in China. It is helpful if Chinese agents have a UK-based partner.



Knowledge

China's 1-child policy formally ended in 2016 and the Chinese government allowed families to have 2 children, changing again in 2021 so that all married couples are now permitted to have 3+ children. This means that currently many families have a large age gap between their children, with some younger siblings wanting to come to the UK like their older siblings.

There is a growing trend for one parent to accompany a younger child who may start initially as a day pupil (under 12 years old) before moving into boarding. **Take a look at our recent Webinar recording with Fragomen immigration lawyers entitled International Day Pupils: What is acceptable and what are the risks? for guidance on best practice regarding UKVI compliance.**

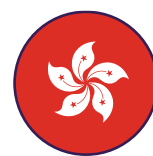


Support

Your usual social media platforms are not permitted in China. **Take a look at our Webinar recording from June 2023: How to understand the culture and etiquette of Chinese social media marketing. Do ask your agents for advice.**

Brand awareness is a real challenge – only famous schools or those with a presence in China are well known. **There are many marketing tips in our China Country Analysis, helping you to successfully navigate this market.**





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	2	2	2
ISC Data	2	1	1

Hong Kong had long been the largest market for pupil recruitment into UK boarding schools until, in 2015, China took over in terms of the total number of non-British pupils with parents living overseas. There are approximately 3,300 Hong Kong boarders in our member schools.

In the 2022 ISC Census, Hong Kong returned to first place and remained there in 2023, with 22% of the total number of pupils with parents living overseas. However, in the BBSN Top Markets table it is still showing just slightly behind China.



What agents are telling us this year

- Many Hong Kong families have moved to England with a BNO visa. As of November 2023, over 120,000 Hong Kong residents had migrated to the UK. However, agents believe that the wave of BNO enquiries is coming to an end.
- The UK is still very attractive and the No.1 destination for boarding schools.
- Parents are still league-table driven and education remains a top priority for Hong Kong families.
- Many parents are attracted by the prestige of a well-known school name, and as a mature market, parents have a good knowledge of UK schools, unlike many parents in China.
- Parents seem more willing for their children to attend schools in other areas of the UK, not necessarily close to large cities.
- Competition is fierce, with many UK schools now visiting Hong Kong at least twice a year.
- Some families are being specific about where they want their child to be in the UK, as they know people who have resettled due to BNO.
- The focus remains on Years 9, 10 and 12 entry points, although more families are seeking prep school entry.

- The market is stable, although some agents felt that enquiries are slowing down. The birth rate in Hong Kong is low and the population is decreasing.
- There is strong competition from other countries, particularly Canada and Australia.



Contacts

There are currently 81 BBSN member agencies recruiting from Hong Kong, with some very well-established and well-known agencies based in the country.



Knowledge

The UK government introduced a policy in January 2021 to allow Hong Kong BNO (British National Overseas) passport holders to apply to live and work in the UK. This has also increased the number of Hong Kong pupils in UK schools, but many will be day pupils. According to the ISC Census, the number of Hong Kong pupils whose parents live in the UK has grown from 496 in 2021, to 1538 in 2022, to 2,357 in 2023. As of November 2023, over 120,000 Hong Kong residents had migrated to the UK.

The Hong Kong government is providing resources and financial incentives for Hong Kong companies to work in “The Greater Bay Area” (GBA) – an area of 11 Chinese cities (including Hong Kong, Macau, Shenzhen and Guangzhou), set up by the Chinese Government and “having great significance in the country’s implementation of innovation-driven development and commitment to reform and opening-up”.



Support

Hong Kong students and their parents find it hard to appreciate the emphasis on co-curricular activities in UK boarding schools. Parents will judge schools almost entirely on league tables and the quality of examination results. **If you need any assistance with ideas on how you can market your school to this mature market, our International Recruitment Adviser, Jayne Grigg, is always happy to have a Zoom call to share her extensive knowledge. There is no charge for this service – it is included in your membership.**

Schools need to be aware of possible tensions in the boarding house between students from Hong Kong and China. **Read the full Country analysis in The Knowledge Hub to find more tips and information to inform your recruitment strategy for this market.**





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	3	3	3
ISC Data	4	3	3

Germany remains a key market for British boarding schools and our agents report it is still a strong market for those schools prepared to offer flexibility with shorter-term stays.

Germany ranks 3rd behind Hong Kong and China. In the BBSN data, this makes up 9.5% of the total number of international boarders but doesn't reflect the many short-term students who join in the autumn and summer terms. There are approximately 1,960 German boarders in our member schools.



What agents are telling us this year

- The education system for most German federal states has now changed back to 13 years.
- Since this change, there has been a significant shift in enquiries from Year 11 to Year 12 instead (A level, IB or Scottish Highers).
- This is a challenge for students who want one or two terms, as many schools can't accommodate short-term stays in Year 12.
- Interest for Year 9 and below continues to be marginal from German families, with no interest for prep school boarding.
- Visa requirements since Brexit are still a barrier for some families.
- Shorter-term stays have increased for financial reasons; demand has dropped from one year to one term or one and a half terms.
- Some agents have reported that families are becoming more price sensitive, as the German economy is struggling. Agents are very concerned about the impact of possible VAT on school fees.
- Some families are being put off schools where there are too many other German students.

“ Due to the change in the German schooling system back to 13 years, we are seeing a 75% increase in applications for Year 12. ”



Contacts

We have 41 agents recruiting from Germany, with 15 based in the country. Munich and Hamburg are key hubs with several agents in each city. Germany has many established, knowledgeable and highly respected agents who can be trusted and will want to visit schools in the UK before recommending them.



Knowledge

Good integration is a main requirement for German parents – they want their child to improve their English and meet new people. A period in a UK school generates motivation which may be absent in the German school system. The breadth of activities, the encouragement to explore new challenges and a formal structure for studies appeal very strongly to German parents and students.

You can find further details about the changes to the German education system from September 2023, and the impact on recruitment to British boarding schools, in The Knowledge Hub under the Country Analysis.



Support

As German students must meet certain academic requirements to go back into the German education system, they take great care in selecting their subject choices. **See the useful guidelines on UK qualifications' requirements for German universities, which you can find on the Germany Country Analysis.**





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	5	4	4
ISC Data	6	4	4

Spain sits in the BBSN table at 4th place, representing around 1,300 boarders in our member schools.

Prep schools, girls' schools, and all schools which can be flexible find that Spain is a good market to pursue.



What agents are telling us this year

- There has been some mixed feedback from agents, with some reporting a small decline, others saying that the market is static. However, the vast majority of agents we have spoken to in the past few months tell us that interest in UK boarding schools is continuing to grow since the pandemic.
- Some agents have also reported an increase in the length of stays, with one year becoming more popular (particularly Year 11), although it is primarily a short-term placement market.
- One term stays are popular as they do not require a visa. According to one agent, parents are less concerned about the fact that they need a visa than the fact that it is so expensive, including the IHS.
- The quality of UK schools remains attractive. However, there is stiff competition from Ireland (no visa required), and from the USA and Canada.
- Fee increases have impacted families and affordability is now much more of an issue.
- Agents request that schools are transparent about the number of Spanish students they have. Families do not want to send their child where there are too many other Spanish students.
- Summer schools are very popular.
- Parents dislike compulsory exeat and would prefer their children to stay in school rather than go to guardians.

“ The UK is becoming even more popular. Parents appreciate that Ireland is cheaper, but the schools are just full of Spanish students - parents are prepared to pay more to ensure the children are well integrated into full British boarding culture. ”



Contacts

There is a strong and experienced group of agents working to assist families in finding schools in the UK and their assistance is recommended. Some new Spanish agencies have joined BBSN membership over the past year, and we currently work with more than 70 agents recruiting from Spain. Madrid and Barcelona are key cities where agents are based.

ASEPROCE is an organisation of Spanish agents formed in 1987 and membership signifies quality and high standards. Parents rely greatly on Spanish agents' advice. Agents are seen as long-term partners with families who expect excellent communication with schools.



Knowledge

As the students' interests are more likely to be language and activity based than purely academic, most Spanish agents will look at weekend activities, the percentage of international students, and numbers of Spanish speakers.

The convalidation system in Spain requires any student spending Year 11 (4 ESO) out of the country to pass 4 i/GCSEs plus Spanish. Students must return to Spain with a full academic report to ensure correct placement back into the Spanish education system. Validation of studies is important and, since Brexit, exam documents have to be apostilled under the Hague Convention.

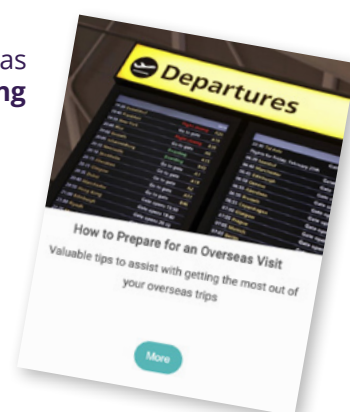


Support

With accessible cheap flights, it is worth schools visiting agents individually in key cities, as well as inviting agents to visit the school. Before booking a trip, **download our 'Preparing for an Overseas Recruitment Trip' document in the 'How to Guides' section of The Knowledge Hub.**



Spain is a key market for prep schools, and you can find our webinar recording and slides on **'How to Understand International Markets for Prep Schools'** in the **'How to Guides'** section of The Knowledge Hub.

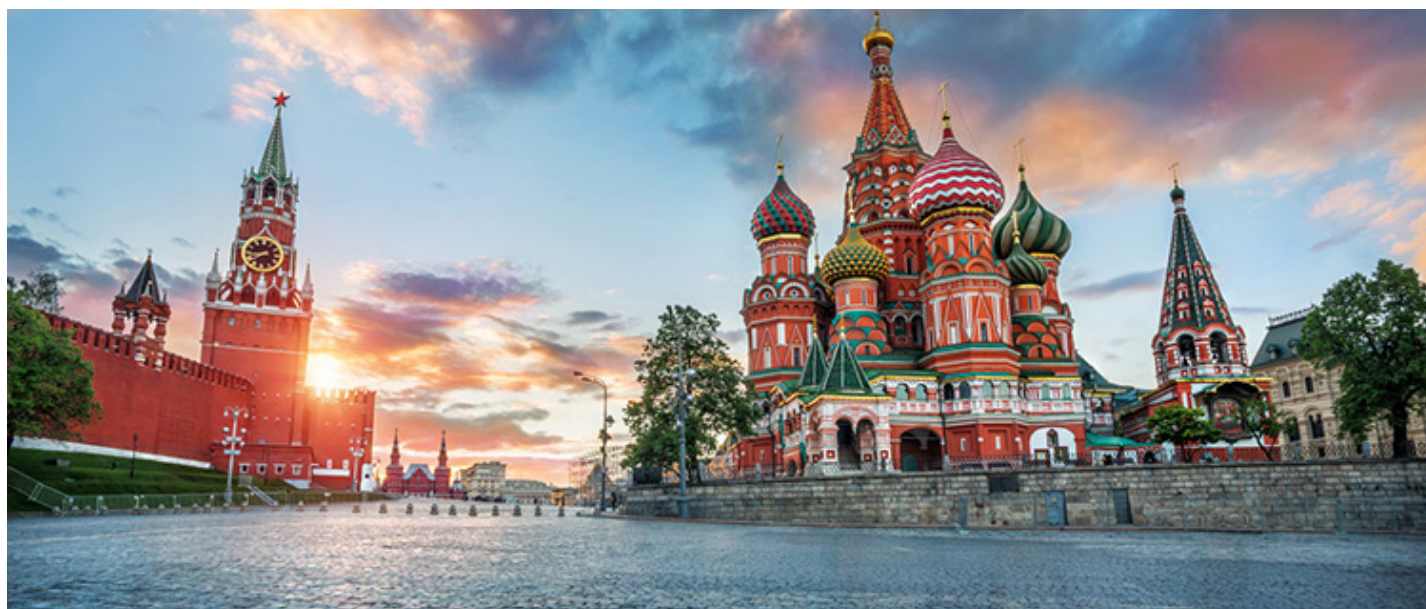




	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	4	5	5
ISC Data	5	5	6

Until 2014, Russia was one of the most rapidly expanding recruitment markets in the world for UK schools. From its 2014 peak, the number of new Russian pupils joining UK schools has fallen. According to the 2016 ISC Census the market dropped by 37% compared with 2015 figures. In 2018, however, the decline had slowed down in relation to the number of new pupils coming into ISC schools - a decrease of 13.4%.

The war between Russia and Ukraine has inevitably seen numbers of pupils from Russia fall, but perhaps not by the amount that some anticipated. For the moment, Russia sits at 5th place in the BBSN Top Markets table, having dropped down one place since 2018, representing around 800 boarders.



What agents are telling us this year

- There are still people in Russia with money and those with money in Russia have found ways of getting it out.
- Agents are continuing to help families who are displaced all over the world, particularly to UAE, Turkey and Europe.
- For some agents, recruitment numbers have improved this year compared to 2022/23, including for 2024 summer school placements; others have said that the market is static or quiet, particularly for younger pupils.
- Some families have decided not to put off their plans for international education for their children, as they are not sure that the same opportunities will be available in the future.
- UK visa processing times, visa refusals and the visa requirements for bank statements are obstacles due to sanctions on banks in Russia. The transferring of funds out of Russia continues to be difficult.
- Some Russian families who moved to Dubai and got their children settled into international schools there are not keen to uproot them again to send them to the UK.

- More Russians are making last-minute decisions, with less future planning. One agent commented that they have lost control of their future so are living for today. However, as the war has progressed, families who have moved to other parts of the world have realised that they are there to stay for some time, so they want the education of their children to be in UK boarding schools as it is no longer a temporary solution.
- Many Russians are applying using non-Russian passports, eg Moldova.

“The market in Russia is not easy though the interest for boarding schools in the UK is solid and the demand is growing. On the contrary, more and more families show interest in British boarding schools outside of the UK, predominantly in UAE, Malaysia, Singapore and Thailand.”



Contacts

We have 80 agencies recruiting from Russia on the BBSN portal; some we have worked with for many years. Many of them had offices, colleagues and family in both Russia and Ukraine. Some of these agents have now set up offices in other parts of the world, or at least set up overseas bank accounts so that they can continue to operate.



Knowledge

Russian citizens are still able to obtain a visa to the UK. However, some steps of the immigration process are delayed. There are lengthy appointment wait times for visa application centres and TB testing sites in Russia and English language testing (required for Skilled Worker visa applications) is largely suspended. Fragomen report that Russian applications are taking longer than normal with an estimated processing time of around 6-8 weeks, so early application is advisable. In addition, there is currently no priority service available in Russia meaning all applications are via standard service only.

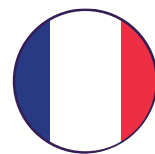


Support

BBSN member agents tell us they are grateful to be part of the Network and the supportive community it provides, giving them the opportunity to speak freely and honestly to schools at our Workshops and Networking Days.

We work closely with the Immigration law firm, Fragomen LLP, who provide regular updates and webinars for our members. **You can find more information in the specialist section of The Knowledge Hub on the BBSN portal entitled ‘Sponsorship & Compliance’.**

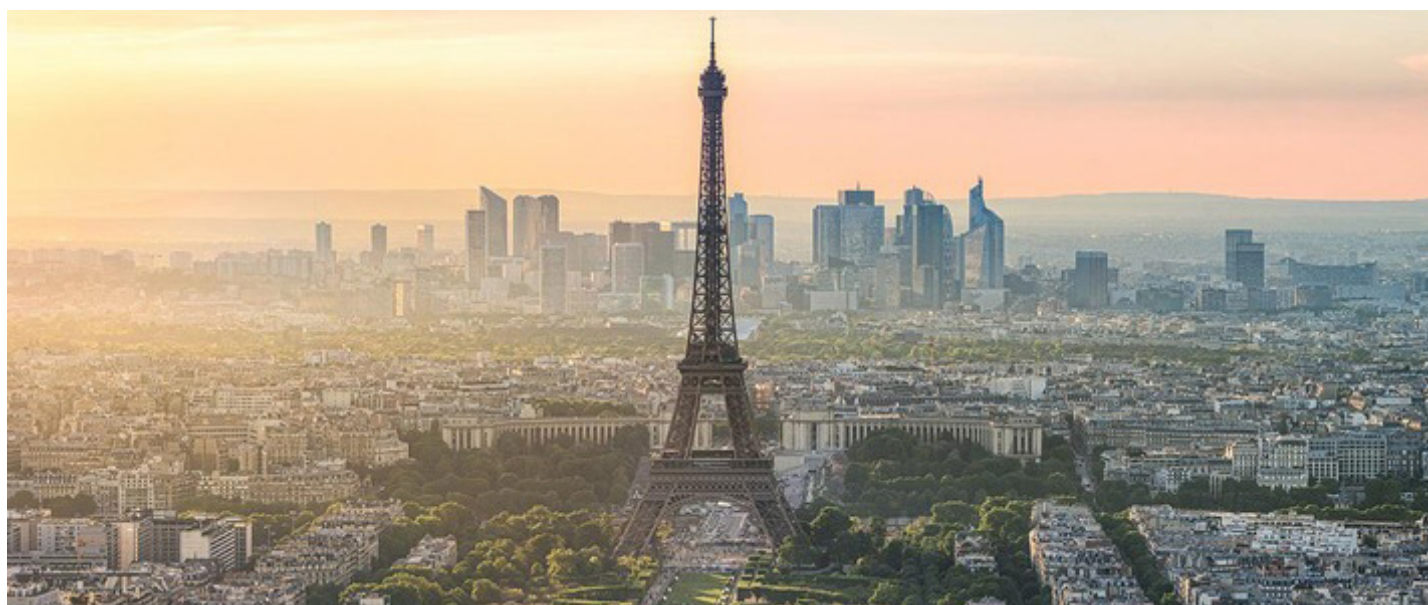




	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	10	8	6
ISC Data	17	16	17

France is a key market for prep and senior schools that offer short-term (usually summer term) stays and June immersion programmes, as well as being a huge summer school market. It is also the third most popular market for Prep Schools after China and Spain. The market has increased, shown by the jump from 10th to 6th place in our Top Markets table, representing 670 boarders in our member schools.

French pupils coming into British boarding schools are increasingly keen to experience their unique provision, but affordability is key. Those schools which are willing to accommodate a two to six-week short stay in the final weeks of the summer term will benefit from this growing market.



What agents are telling us this year

- Agents have seen more demand than before Covid.
- Short-term stays are still the most popular, as the French education system makes it complicated for pupils to re-integrate back into their current schools.
- Whilst demand is there from families, they need permission from their child's French school, which is often refused.
- If the French Ministry of Education ever agrees to French schools recognising a year abroad, demand for longer term placements would soar!
- Affordability is often an issue.
- Short-term pupils of Year 11 age will generally go into Year 10 in a British boarding school for a short-term immersion programme.

“ It is a growing market although still a niche market. ”



Contacts

The BBSN portal shows 50 agencies recruiting from France, many of whom also recruit from other European countries. 11 agents are based in France and Paris is a key hub. It is noteworthy that more agencies based in France have become BBSN members in the past year.



Knowledge

Some of our agents work with private French schools, where the Heads have no problem with students leaving and spending one year abroad. However, as that year is not certificated, the students have to then return to the year group they would have been in, meaning their peers move up without them. Occasionally, a bright French student who has moved ahead a year at their school in France, may be able to attend a UK school for a whole year and then go back into the French system.

In December 2023, the UK government published a Statement of Changes, relaxing travel document requirements for school groups of five students or more from France. The school must be registered with the French Ministry of Education. **Further information can be found [here](#).**



Support

If you run a summer school or short course programme, you may want to consider having a separate **summer school profile** on the BBSN platform. If you would like further information on this, and whether it is right for your school, please email suzanne@britishboarding.com.





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	9	10	7
ISC Data	Included in the Group: Remainder of Europe non-EEA	Included in the Group: Remainder of Europe non-EEA	9

Ukraine was previously included in the ISC statistics of overseas pupils coming from the group “Remainder of Europe Non-EEA”, although we knew that Ukraine was the largest market in this group of countries, appearing in the Top 10 in the BBSN Top Markets table. Ukraine was separated out of this group in the ISC Census for the first time in 2023 as pupil numbers rose due to the war with Russia. There are approximately 625 Ukrainian boarders in our member schools.

The move to online working during the pandemic has helped companies to survive, with them continuing to work online during the war, and from any location. Agents are continuing to help families who are displaced all over the world.



What agents are telling us this year

- They are continuing to work very hard to support the young people of Ukraine and their access to education.
- Some of our agents have seen increased enquiries for studying in the UK for both boarding schools and universities. Others say that the number of enquiries has fallen compared to last year.
- The UK, Canada and the USA are still popular destinations for families. One agent said that Canada used to be the first-choice destination for their families, but the UK is now No.1.
- The war has pushed parents who were indecisive to send their children to a safer place for education.
- Some families are still trying to independently place their children in state schools under the Homes for Ukraine scheme. However, there are still families who would like to send their children to an independent boarding school.
- Keeping up to date with sector knowledge and what individual schools can offer is really important, as they never know what the next client will need – everyone’s situation is so different now.
- Some parents are looking at cheaper options for schooling and summer schools in Europe rather than the UK.

- While some families are able to afford full fees, many still require some fee assistance.
- More families are wanting A levels or Foundation courses as Ukrainian students have spent so many years working online - first with Covid and then during the war, that they are totally unprepared for university.
- Parents have become more careful with their money. Their priorities have switched to longer-term study plans, with decreasing numbers of language holidays abroad and increasing numbers of university applications.
- The choice of country for boarding schools has become more focused on what's next, looking at the different possibilities for higher education and immigration policies.

“ Words can't express the amount of gratitude and appreciation for countries that welcomed Ukrainian refugees and provided them with access to education. ”



Contacts

We have 64 agencies recruiting from Ukraine. Some agencies have stayed in Ukraine, or still have one or two employees working out of Ukraine, but many have moved and set up offices in other parts of the world, in the UK, Europe, the USA or Canada.



Knowledge

Ukrainian agents have found that their client base has broadened. They report interest from parents who are still living in Ukraine who had never previously considered education abroad for their children. Understandably, they now want their children to have a quality education in a safe environment.

As the war has continued, agents are making longer-term plans and we are seeing agencies reconsidering their business opportunities, diversifying, and opening new offices in different countries.



Support

BHSU is a CIC founded in March 2022 following the Russian invasion of Ukraine. BHSU was created by BBSN members Valeria and Tatiana Samborskaya from Business Link (who were forced to leave their home in Kyiv as bombs began to fall on the city in February 2022), and fellow BBSN member and co-founder Kate Hargreaves from Living Learning English. Their focus is to support displaced Ukrainians temporarily residing in the UK under the Homes for Ukraine scheme through educational, employment and training opportunities.

BHSU would love to hear from schools interested in taking part in their annual Summer Schools campaign and you can read more about their initiatives in the **News & Knowledge section** of the BBSN portal, or contact them directly at support@bhsu.co.uk.





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	7	9	8
ISC Data	Included in the Group: Remainder of Europe EEA	14	16

As of January 2024, Italy sat at 8th place in the BBSN Top Markets table and represents 615 Italian boarders.



What agents are telling us this year

- The market has been slow to pick up post-Covid. One agent has told us that enquiries are similar to last year; another is more optimistic and says that enquiries are up year on year.
- Most enquiries are for 6th Form (two-year programme) or short term (one term or less). Enquiries for younger pupils, including Prep school pupils, tend to be for short-term immersion programmes or summer school.
- This is still predominantly a market for those offering the IBN Diploma, rather than A levels, with many students staying on to university in the UK.
- Families sometimes have unrealistic expectations regarding academic levels, wanting maximum opportunities for minimum cost.
- Italian students can study abroad for the equivalent of Year 12. However, this is difficult in the UK unless schools offer a one-year programme, so students often choose the USA or Canada where they can get a diploma in one year. Alternatively they sometimes come to the UK for just one term. Schools offering the pre-IB Diploma one year course are popular.
- There has been a rise in summer school enquiries and for summer immersion experiences.
- Since Brexit, enquiries for UK universities are down – only the very top UK universities still appeal to Italian students.
- The visa process and associated expenses are causing some families to consider schooling in other English-speaking countries, as well as Spain.

“ Italian families are still interested in top IB schools, and in short experiences in boarding to give their children the opportunity to experience a different methodology and improve levels of academic English. The whole rounded education and a more practical approach are well regarded aspects of the British system. ”



Contacts

The BBSN portal shows 50 agencies recruiting Italian students; 11 of which have offices in Italy, in Rome, Prato, Udine, Milan and Biella.



Knowledge

Schools which can offer a one term experience or one-year 6th form place in Year 12 will attract pupils (as mentioned above). Italian pupils can still go home after their year abroad and enter their last year of study in Italy, complying with the Italian Ministry of Education's ruling that stays of one term up to one year are only allowed in a pupil's penultimate year of study.

Summer school programmes concluding with a recognised EAL qualification are preferred and reflect the importance of the acquisition of a good level of English.



Support

Remember to **ensure your school profile is fully searchable and up-to-date**, particularly when it comes to whether or not you accept pupils for short term stays. For example if you are an all-through boarding school (7-18 years) and are able to accept younger pupils for a June immersion programme, add a note to this effect. The more information you provide for agents, the more likely they are to consider your school.





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	6	6	9
ISC Data	9	8	7

Nigeria is the 4th largest market for single-sex girls' schools and remains a top ten market player overall. The figures shown for Nigerian students are likely to underestimate the actual market size, given that many Nigerian families are also British passport holders and have houses in the UK. There are 570 Nigerian boarders in our member schools.



What agents are telling us this year

- There is still a lot of interest and demand. Parents are looking for great quality and a UK education is highly valued.
- Agents have seen student numbers affected by the continuing high rate of inflation, the poor exchange rate and the shortage of foreign currency. It is a difficult and lengthy process for families to take money out of Nigeria. However, there is cautious optimism that Nigeria's financial situation will improve in 2024.
- Affordability (due to the reasons above) is currently the key problem and many agents are spending more time trying to work out who can afford fees and who can't. Many families require financial assistance, even if this is just short-term until exchange rates improve.
- Careers counselling has increased as agents increasingly advise beyond boarding schools, looking further ahead to pathways, university placements and outcomes.
- Ireland is popular for pre-med courses as it is easier to get into than the UK and cheaper.
- Families who are used to the UK are sticking with it, but others are keen to venture towards Ivy League universities so are trying the US.
- For financial reasons, more students are looking at Foundation courses as an alternative to A levels.
- Charterhouse Lagos opened in September 2023. Will others follow?



Contacts

We have 28 agents recruiting from Nigeria. Nigerian education agents vary in their experience and new agencies continue to appear as entrepreneurs see a potentially lucrative source of finance. The latter are to be avoided unless solid references can be obtained. Working with trusted partners in difficult territories such as Nigeria is essential.



Knowledge

There is a strong referral culture in Nigeria – the better relationships you have with your Nigerian parents, the more referrals you will receive. Remember to engage your alumni and meet up with them if you visit Nigeria.

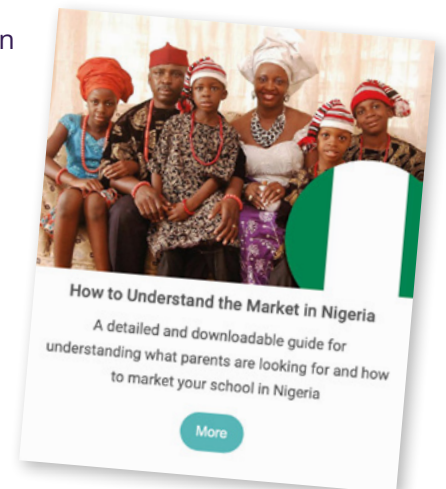
We work closely with the payment solutions company **Flywire**, who exhibit at the British Boarding Schools' Workshop (BBSW). You can watch their recent webinar – '**Nigeria Spotlight: Navigating Educational School Fees**' [via their website here](#).



Support

Many Nigerian agents organise in-country Recruitment Fairs and will escort you on your visit to Nigeria. Ensure you work with a reputable agent and check out the tips on page 4 of our '**Preparing for an Overseas Recruitment Trip**' document in the '**How to Guides**' section of The Knowledge Hub.

For more information on how to market your school to Nigerian families you can also **download the Nigeria Country Masterclass document in the 'How to Guides' section of The Knowledge Hub**.





	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	18	11	10
ISC Data	19	17	19

The USA stands at Position 10 in the BBSN Top 30 Markets and Position 19 in the ISC Data. Despite this, it is a country few schools visit for recruitment purposes, and there are very few agents and fairs there.



In August 2023 we consulted 110 BBSN member schools who were showing as having US students and received 46 responses.

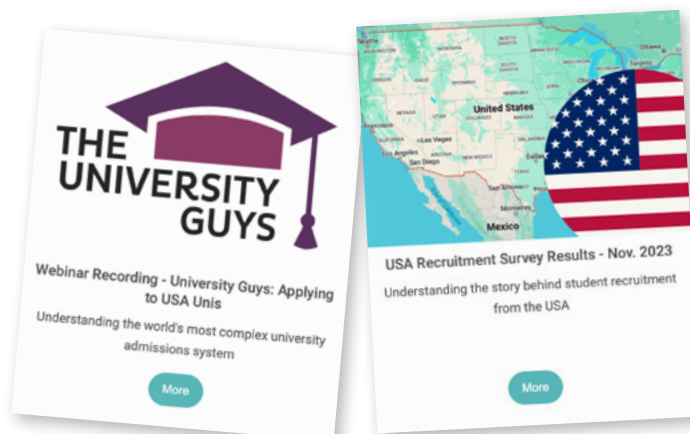
Our research found that the number of US families, with US parents based in the US, sending their children to UK boarding schools is low; there is invariably an international connection, whether it be their country of origin, the nationality of one of the parents or the location of their work. Even in such cases, the use of agents is not a regular occurrence; families are happy to do their own detailed online research and approach the school direct.

It is also clear that many of the US passport holders in schools are not from the USA – they come from a range of countries, for example China and Nigeria, or they are dual passport holders and schools may choose to allocate them to the nationality which suits the diversity mix of their boarding houses.

We then consulted with our agent members regarding the kind of families who might be looking for a UK education.

You can download all the findings: **'USA Recruitment Survey – Summary for Schools, November 2023'** from the 'News & Knowledge' section of The Knowledge Hub on the BBSN portal.

Also in The Knowledge Hub you can find the webinar recording **'The University Guys: Applying to the USA', from 30 January 2024**, covering what schools need to consider when an international student joins a British boarding school with the dream of going to a university in the USA after Sixth Form.





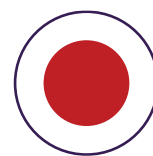
	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	8	7	11
ISC Data	10	11	10

Thailand has moved down to 11th place in 2024 from 8th place in 2018. The drop reflects the growing number of international schools in Thailand. It is an important market for schools seeking long-term boarders including single-sex schools, as Thailand sits in 7th and 8th place respectively in the top markets for girls' and boys' schools. There are more than 460 boarders from Thailand in BBSN member schools.



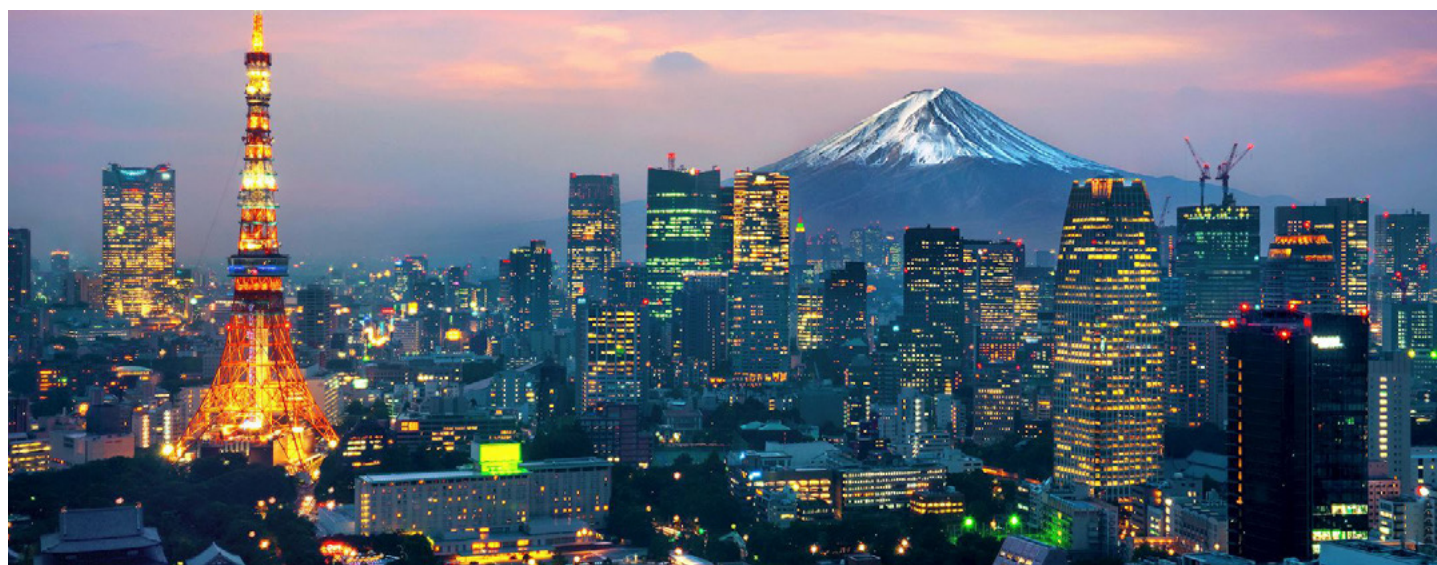
What agents are telling us this year

- The UK is still the No.1 destination for overseas education, but there is strong competition from Canada and Australia.
- This market also faces aggressive competition from UK boarding schools opening branches in Thailand and many new international schools in Thailand (numbers grew from 133 in 2011 to 235 in 2022).
- However, the opening of these schools in Thailand illustrates the rise in families able to afford this education, both Thai, expat and a growing number of Chinese who are relocating to Thailand.
- More local international schools has resulted in a shift towards students applying in later years, Years 9, 10, and 1-year GCSE, as well as 6th form, rather than joining in Year 8 or Year 9 which was more common 10 years ago.
- At the other end of the scale, agents have seen aspirational parents looking for students to attend key feeder prep schools to access the best schools via that route, with some parents accompanying their children as day pupils until they are 12.
- Spring term immersion programmes are very popular (3 weeks in March/April), leading to long-term placements sometimes two or three years later.
- Some agents feel that the market has slowed down and affordability is more of an issue, with many families requesting financial aid or scholarships.



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	12	12	12
ISC Data	18	15	15

Japan remains static in our Top Markets table at 12th place and represents around 380 boarders in the BBSN member schools.



What agents are telling us this year

- The increase in the number of International schools in Japan is raising awareness of “internationalism”. They are very expensive and of varying quality, so some families feel they would rather send their child to the UK for the complete experience.
- Parents still hope that they can get their children into the best-known top schools (Eton, Harrow, etc) but as they plan early, they are sending their children earlier to attend good Prep Schools to maximise their chances.
- There has been a significant increase in prep school enquiries, with one agent stating that over the last 10-15 years the ratio of Prep:Senior enquiries has changed from being mainly Senior to now being 50:50 Prep:Senior, if not slightly more going to Prep.
- Another reason that more Japanese parents are keen to send young children under 12 overseas is because they are frustrated with the Japanese education system which has not changed for the last 30-40 years.
- As the Japanese Yen is very weak and at its lowest level in 50 years, affordability might be an issue moving forward and this, alongside increasing numbers of international schools may, start to affect the prep school market.
- Weakness in English remains an issue for entry tests and accessing courses, so options for language/pre-boarding preparation courses (April – Sept) are welcome.
- Generally, boys are keen to attend single-sex schools, but it is less popular for girls who tend to attend co-educational schools.
- Japanese families like testimonials from other Japanese students and parents.

Mexico



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	14	13	13
ISC Data	14 (Included in the Group: Central & South America)	12 (Included in the Group: Central & South America)	14

Mexico has moved from 14th to 13th place reflecting the market growth that agents report. It represents around 250 boarders in our member schools.

What agents are telling us this year

- There is increasing interest from Mexico, with 2024 enquiries better than 2023.
- Mexican families love it when schools can offer half-term trips either in the UK or Europe. This ensures students get a great experience and do not have to return home for a week or stay with another family.
- Few Mexican students come to the UK for summer schools as it is too expensive, and Canada is the nearer preferred option for this.
- The preference is for students to go into Years 9, 10 and 11, with pre-IB courses becoming quite popular.
- New BBSN agents are working actively to build the market for boarding schools.
- Mexicans are very family-focussed. One agent commented that they like the dining rooms being in the boarding houses as it gives a much more family-feel than a large canteen.

Turkey



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	15	19	14
ISC Data	Included in the Group: Remainder of Europe non-EEA	Included in the Group: Remainder of Europe non-EEA	Included in the Group: Remainder of Europe non-EEA

Turkey has moved from 15th to 14th place reflecting the market growth that agents report. It represents around 250 boarders in our member schools.

What agents are telling us this year

- Enquiries are definitely on the up for full-time places, although Sixth Form students are favouring IB Diploma, rather than A levels.
- Through Covid the education system in Turkey really suffered. This, along with political and social dissatisfaction in Turkey, has contributed to the significant growth in the number of students heading abroad.
- There is increased interest in short term immersion programmes.
- Affordability can be a problem for families, due to the poor exchange rate.

South Korea



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	28	14	15
ISC Data	15	18	18

South Korea has jumped up the BBSN Top Markets table from 28th to 15th position. It represents around 240 boarders in our member schools.

What agents are telling us this year

- Recruitment has been up, and it has felt much busier. Parents are still planning late though.
- This is a very price sensitive market.
- South Korean students prefer schools in the UK, mainly Sixth Form, followed by university in the USA.
- One agent reported more enquiries about medical school, with parents interested in schools with good medical school outcomes.

Switzerland



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	19	22	16
ISC Data	Included in the Group: Remainder of Europe EEA	Included in the Group: Remainder of Europe EEA	Included in the Group: Remainder of Europe EEA

Switzerland has moved up from 19th to 16th place and represents around 180 boarders in our member schools.

What agents are telling us this year

- There has been more interest in schools in Scotland (which is dubbed the “Canada of the United Kingdom”)!
- Bespoke planning has increased – looking at the whole student journey beyond boarding school.

Kazakhstan



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	16	17	17
ISC Data	16 Included in the Group: Central Asia	19 Included in the Group: Central Asia	20 Included in the Group: Central Asia

Kazakhstan has remained stable in the Top Markets table and sits at 16th place, representing around 160 boarders in our member schools.

What agents are telling us this year

- There is real population growth in Kazakhstan - there was a baby boom in 2007 and it has continued.
- However, families have less money due to inflation, with one agent saying that it is only those parents connected to government, gas or oil that have the money to send their children overseas – it is a very narrow tier of the population.
- International schools like Haileybury in Almaty and other US international schools all have waiting lists.
- The driving force behind an international education at home or overseas is to be able to access top level universities so the emphasis is definitely on Sixth Form. However, more families are considering GCSEs as preparation for Sixth Form.
- There has been a considerable increase in demand for academic summer courses, which leads to some deciding to continue their education in the UK.

Romania



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	Outside Top 30	29	18
ISC Data	Included in the Group: Remainder of Europe EEA	23	25

Romania has moved from outside the Top 30 Markets to sit at 18th place, representing around 160 boarders in our member schools.

What agents are telling us this year

- The UK is still the No.1 preferred destination for education, but the rising cost of boarding fees is having an impact, especially as their proximity to Ukraine has affected people financially.
- Co-ed is preferred; Romanians are totally unfamiliar with single-sex education.
- For those who can still afford education in the UK, the age is falling. Families are looking at sending children into Year 9 or 10 so that they are better prepared to embark on A levels or IB programmes.
- Many families, however, are now looking at international (English speaking) schools within Europe due to high UK boarding fees, visa costs and the large deposits required.
- Students often want to attend US or European universities, so schools need to be prepared for this at the outset so that the correct advice is given.
- Summer Camps are popular.

India



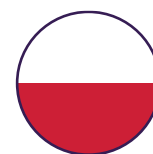
	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	22	16	19
ISC Data	20	21	22

India has moved from 22nd to 19th position and represents around 160 boarders in our member schools.

What agents are telling us this year

- The Indian market is increasing, with more interest in UK boarding schools.
- Demand is increasing thanks to a small number of active BBSN agents who are working hard to promote British schools and to educate Indian families about the British education system and UK schools they have not yet heard of.
- League Table rankings continue to be of great importance to families.
- Having testimonials from other Indian families definitely helps.
- Working with alumni can also help raise awareness in this market.

Poland



	January 2018 (pre-Covid)	January 2022 (post-Covid)	January 2024 (current)
BBSN Data	21	23	20
ISC Data	Included in the Group: Remainder of Europe EEA	24	26

Poland has moved from 23rd in 2022 to 20th position this year. It represents around 160 boarders in our member schools.

What agents are telling us this year

- In the past, there was dissatisfaction with a rather stagnant education system. However, agents tell us that there has been an improvement in the Polish education system as well as an increase in international schools, both of which may impact the number of applications to the UK.
- There are, however, still many families who recognise that a UK education is of a higher standard and will give students access to better universities.
- The UK is still favoured over Canada and the US (but mainly due to the distance).
- A levels are favoured over IB although some IB schools have now opened in Poland which means families are more knowledgeable of what is involved in the IB course.
- There is little compatibility in the education systems, so families find it difficult to know at what age pupils can transfer easily.
- Since Covid, there has been an increase in interest for summer schools so that students can have a "taste" of what UK boarding is like.



Additional Notable Markets

- **Baltic States**

Like many other countries, affordability since Brexit is an issue, and high deposit rates are a barrier to recruitment. Latvia is going through a new school reform which is unpopular with parents, resulting in an increase in sending children abroad.

- **Bulgaria**

After Brexit, there has been a bit of a shift of interest towards schools offering a British curriculum in other parts of Europe. However, one agent reports that families are now returning to the idea that the UK version of the British curriculum is the best. There is little, if any, demand for short term applications due to the Bulgarian education system which does not allow students to take time away from their school.

- **Iran**

Affordability is an issue due to the exchange rate. The vast majority of students are for Sixth Form. There is a notable increase in interest in creative subjects. Families are now more open to exploring and encouraging their children to take up careers in the creative industries, showing a broadening of perspectives and an appreciation for more diverse fields of study.

Fragomen immigration lawyers have warned that some schools have recently had an unusual spike in direct applications from Iranian (and also Vietnamese) nationals. Schools need to be very cautious about offering sponsorship to students where a pattern such as this has been identified and ensure they undertake thorough checks to avoid any risk to the school and sponsor licence.

- **Malaysia**

Malaysia is not a strong summer school market - only for the super-rich. There is still a very healthy interest in the UK, particularly for Sixth Form. Malaysia has a January - December academic year, so flexibility from schools regarding a January start is always appreciated by families.

- **Taiwan**

There has been an increase in interest from Taiwan this year. Many families fear war with China, so are more inclined to send children away younger, not just for Sixth Form. There is more interest from Taiwanese holding dual nationality as the Taipei European School has changed its curriculum and parents are not happy with it.

- **Saudi Arabia**

Saudi Arabia is an emerging market and will take time to develop. We have several agents working hard to open up this region for boarding and summer courses. The general consensus is that Nationals are not yet ready to send their children to the UK for boarding. However, more international schools are opening in Riyadh, and this will raise the profile of UK education.

- **Vietnam**

Vietnam is still a very price sensitive market. Enquiries are mainly for Sixth Form and for summer schools. There is strong competition from local international schools and from Canada. Parents like to hear from UK schools where Vietnamese students have gone on to top universities.

- **South America**

In South America, **Brazil** is the largest market and has moved up one place from 30th to 29th in the BBSN Top 30 markets. Numbers from **Argentina** and **Chile** have also increased. Other South American countries are sending some pupils, but not in significant numbers (under 40 at member schools). Short-term placements are the norm at the moment.

- **Africa**

Ghana and **Kenya** are the next significant African markets after Nigeria, each currently at roughly 0.4% of the total market share, with about 80 students from each country currently at our member schools.

- **Forces & FCDO** (Foreign, Commonwealth & Development Office)

The CEA (Continuity of Education Allowance) to assist Service personnel has not increased in the same way that boarding fees have and is now £8,692 per term. It is the same regardless of rank, so some parents have very little disposable income to make up the rest of the fees. Schools deal with this in a variety of ways. This is available from the year a child turns 8 years.

The FCDO is more generous in funding, so any discount offered by schools may need to differ. However, it is only available from Year 7.





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