



## WHITE PAPER

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Why parents select an international school, and the impact of COVID-19 on school choice



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# **Why parents select an international school, and the impact of COVID-19 on school choice**

In 2000, when ISC Research was already researching the international schools market, the industry was made up of 2,584 schools serving children from age 3 to 18, with 969,000 students and 90,000 teachers<sup>1</sup>. Thirty years ago, international schools typically provided education for the children of Western expatriates at embassy or community schools and usually offered a US or UK curriculum delivered wholly in English. Expatriate parents often had little choice of education provision for their children who were invariably unable to access local schools due to language, curriculum or legislation barriers. This resulted in many schools being set up by companies needing to provide for staff with young families, or by parents who were seeking international education and addressing a direct need for their own children.

Over the last thirty years that market has evolved considerably. At the close of the 2019-2020 academic year there were 5.98 million students being educated in 11,616 international schools by 554,000 teachers<sup>2</sup>. What was once a provision of necessity, almost exclusively for Western expatriates, is now meeting the desires of many people of many nationalities. Today, according to ISC Research analysis, just 20% of the total international school student population have expatriate status. The greatest demand (80%) is from local families.

In most global cities of the world, parents now have extensive education choice including a wide range of international schools. Some are provided by large international school groups such as Nord Anglia, GEMS and International Schools Partnership, others by independent school brands operating overseas such as Brighton College, Dulwich College, Dwight School and Chadwick School, other international schools are operated by private proprietors, or by local brands, and there are also international schools run by foundations, governments, embassies and charities. Online international schools are also emerging. Today there are both for-profit and not-for-profit international schools<sup>3</sup>.

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<sup>1</sup> ISC Research, (2020). [The Global Opportunities Report 2020](#)

<sup>2</sup> ISC Research, (2020). [The Global Opportunities Report 2020](#)

<sup>3</sup> ISC Research, (2019 and 2020). [Country Market Intelligence Reports](#)

## Why parents select an international school

There remains significant demand for international schooling from expatriates who wish their children to access a familiar curriculum in their first language. School choice is often influenced by that which offers least disruption to previous curriculum or education provision in order for children to integrate easily and, later, reintegrate into their national system if there is likely repatriation for the family. Or it is influenced by a sense of familiarity or pride in their national provision. This is particularly typical of expatriates from the United States and the UK.

However, with the majority of demand for international schooling now coming from local families seeking out alternatives to their local state and private options, school choice is based on many other factors. We need to consider why so many local parents are looking for alternatives to, what is often, freely-accessible education provision for their children delivered in their home language.

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Although each family and their needs are different, there are some reasons for choosing an international school that repeatedly arise and have become familiar to admissions teams around the world over several years. In addition, recent global influences have had further impact on choice. In order to better understand current motivations for school selection, ISC Research surveyed admissions staff (admissions directors or senior admissions managers) at a variety of international schools around the world in December 2020. The schools surveyed were geographically spread across key regions that are particularly popular for international education: Europe, the Middle East, East and South East Asia. They included those

operating on both a not-for-profit and for-profit basis, and both boarding and day schools offering a variety of curricula and exit examinations (including UK, US, International Baccalaureate, Cambridge International, and other international options). They included international schools belonging to school groups, and those affiliated with an independent school brand, as well as those privately operated. There were a variety of new and established schools (one school was in its first year of operation), with enrolments ranging between 80 and 5,500 students.

When asked about parent motivations, a number of common themes were highlighted:

### I. Learning in the language of English

Most international schools around the world, and all the international schools that ISC Research tracks (English-medium international schools), deliver all or a significant proportion of subject learning, and conversation within the school community, in English.

Learning, from the earliest age, in the language of English is considered by many families in non-English-speaking countries to be a major factor in achieving global higher education success and, ultimately, international career opportunities and prosperity. In some countries, English-medium instruction is seen by policy-makers, educators and commercial organisations as a “passport to a global world”<sup>4</sup>.

<sup>4</sup> Dearden, J. (2014). [English as a medium of instruction – a growing global phenomenon](#). British Council and University of Oxford

All admissions managers who were surveyed recognised English language learning to be a major priority for families in their selection of potential schools.

A growing number of international schools today, as well as some parents and governments, recognise that teaching in a combination of host and home languages (the language of the country that the school is located and the Mother Tongue language of each child), along with English language learning, is important for students. As a result, there is an increasing trend, identified by ISC Research, in the number of international schools offering learning in languages additional to English as part of their compulsory studies.

Schools in some countries are obliged to offer the local language to all or certain grade levels as part of their compliance with local regulation. . These factors are driving the demand, and resulting supply, of bilingual international schools which now represent one third of the international schools market (see table below).

### Bilingual international school trends 2012-2020

	2012	2015	2020
All international schools worldwide	6,967	8,688	11,451
Bilingual international schools worldwide	30%	30%	33%

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With the increase in local children attending international schools, and in the growing popularity of bilingual schools, ISC Research asked admissions staff how parents view additional languages when selecting a school.

Most of the admissions staff surveyed (67%) considered that the majority of parents view additional languages as ‘somewhat important’ in their selection of a school. The remaining schools were equally divided in their opinions, with half regarding additional languages as ‘very important’ and half ‘not important at all’.

## 2. Academic outcomes and reliable pathways to global higher education

Some parents believe an international school education offers their child a ‘pot of gold’. Many consider that the opportunity for their child to access a prestigious overseas university leads to career success in later life, or in some parts of the world, as the solution for departure from economic hardship for the whole family, or the pathway to emigration away from a turbulent political system. As a result, parents are willing to invest heavily in their child’s education from the earliest age and sometimes have unrealistic expectations of the school.

83% of the admissions staff surveyed stated that academic outcomes are ‘very important’ to the majority of their parents when choosing an international school for their child. 17% believed academic outcomes are ‘somewhat important’. None of those surveyed thought parents considered academic outcomes unimportant.

75% of admissions staff believed that providing effective pathways to global higher education is ‘very important’ to most of the parents who choose their school. 25% stated that it is ‘somewhat important’. No one felt access to global higher education is not important to the majority of families selecting their school.

### Common examination grade averages 2019

	IB Diploma	A/Intl A Levels	Advanced Placement
	Average points	A or A* grades	Average score
Global average	29.63	25.5%	2.91
International schools average	33.60	34.0%	3.54

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The academic outcomes of international schools, as measured by exit examination results, have been proven by ISC Research to significantly exceed global averages (see table above). Many parents who invest in international school education for their child have high academic aspirations for them<sup>5</sup> and so average grade scores are extremely important. They seek out an international school with a strong academic track record in globally recognised curricula and examinations in order to enhance their child’s opportunities for access to the widest possible international higher education options. This is enhanced by the increasingly widespread recognition of a growing range of international curricula and examinations by reputable higher education institutions around the world.

Many higher education institutions recognise the qualities that international school students develop, not simply in their qualifications, but importantly in their English language skills, independent and creative learning skills, and their capacity to contribute positively to their chosen programme of study<sup>6</sup>. The close relationships that some international schools have with a wide range of higher education institutions, as well as their alumni success, is an important admissions message for these schools.

There are a few international schools that, through their admissions marketing, improperly ‘promise’ pathways to named universities, or guaranteed access to ‘top-rated’ universities. Both international schools and universities have a role to play in educating highly aspirational and brand conscious parents that such promises are not possible. No school anywhere in the world can secure an automatic route to such institutions as Harvard, and for many students, such a university would be a poor fit resulting in failure of the student to complete the course or to manage the academic pressure. Most reputable international schools now educate parents and their students about selecting ‘best fit’ universities and courses to ensure degree success and optimum career potential.

<sup>5</sup> Morrison, N. (2019). [International schools are broadening their appeal and breaking down barriers](#). *Forbes*

<sup>6</sup> ISC Research (2020, February). [The pathway from international schools to higher education report](#).

### 3. Curriculum

83% of the admissions staff surveyed in the research believed that the curriculum is ‘very important’ to most of their parents when selecting an international school. 17% feel it is ‘somewhat important’, and none believe curriculum is not a consideration for the majority of their parents.

Many parents have a limited understanding of what constitutes a curriculum, or are heavily influenced by curriculum brands or national curricula without fully appreciating what the learning will mean for their child. International schools have a responsibility to educate parents of the content of their curriculum, how their curriculum develops students’ knowledge, skills and understanding, and how it prepares students for their futures.

MANY INTERNATIONAL SCHOOLS TODAY WANT A CURRICULUM THAT ALLOWS FLEXIBILITY IN ORDER THAT IT CAN BE ADAPTED TO MEET THE NEEDS OF THE SCHOOL LOCATION, STUDENT BASE, AND SCHOOL STRENGTHS

According to ISC Research, curricula is changing in international schools. Traditionally very nationalistic in the curricula they followed, international schools today are more likely to offer an adapted version of a national curriculum that takes into consideration the country that the school is located, or they follow an international curriculum such as Cambridge International, Edexcel or the International Baccalaureate programmes. Hybrid curriculum models that combine various strands of a range of national and international curricula, including elements of the national curriculum of the host country of the school, are also emerging. Many international schools today want a curriculum that allows flexibility in order that it can be adapted to meet the needs of the school location, student base, and school strengths.

#### International school curricula trends 2015-2020

	2015	2020
UK oriented curriculum	3,328	3,491
US oriented curriculum	1,927	2,208
International Baccalaureate	1,337	1,797
Cambridge	982	4,208

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It can be challenging for admissions teams to remain fully aware of the range of curricula being offered at other schools - particularly at those international schools they compete with - and how different curricula develop children in different ways. However, this is an important conversation to have with new parents.

#### 4. Quality and accreditation

An overwhelming 91.6% of the admissions staff surveyed during the December 2020 research thought the quality of their teachers is ‘very important’ to most parents when selecting an international school. Just 8.3% believed teacher quality is only ‘somewhat important’ to the majority of their parents.

An important point highlighted by a number of respondents was that parents are often unaware of how to actually judge the quality of an international school, its teachers, and its academics.

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Teachers of certain nationalities and/or native English-speakers are often favoured by parents (and indeed government policy in some countries) without full consideration for the qualifications, experience, and value to the school community that a broader teacher demographic can deliver. Only 8% of admissions staff said that teacher nationality is ‘not important’ to most of their parents in their selection decision.

The skills and experience of teachers employed by international schools are vital to maintain educational standards, and this does not always relate to their nationality. For example, many Australian teachers work in schools in the United Kingdom before moving to the international school sector to gain the experience of the

National Curriculum of England which opens up more job potential for them<sup>7</sup>. Parents sending their child to an international school may want to see many expatriate teachers in the school, but they also need to be educated about the teachers and the qualities they each bring to benefit the whole school community.

There is a growing recognition amongst more international schools of the importance of a blend of expatriate and local teachers within their staff. This not only addresses some staffing recruitment challenges, but also responds to the growing realisation by some international school leaders<sup>8</sup> that local teachers bring a knowledge and understanding of the local culture that is vital to the school community. Local teachers who have been trained in international education can play a crucial role in guiding expatriate staff regarding local societal influences to learning and hierarchy, contributing to their understanding of host country cultures and context, as well as providing local language support and community cohesion.

Turning to accreditation, just one-third of admissions staff surveyed stated that accreditation was ‘very important’ to most of their parents. 50% of the schools said it was ‘somewhat important’, while almost 17% of respondents said accreditation was not considered at all important by the majority of parents.

The likely reason why most parents do not value accreditation is that they do not understand what it means. Accreditation is a quality mark for a school, often distinguishing it from many other schools (see trends below), but if prospective parents do not understand its meaning, this can be a missed

<sup>7</sup> Hoque, M. (2015, November). [Look to the UK to jumpstart career abroad](#) Education Review Australia

<sup>8</sup> Mast, R. (2020, February). [Staffing from East and West](#) pp 22-23 International School Leader Magazine

opportunity for admissions. Accredited schools and their admissions teams have a responsibility to clearly explain the accreditation qualification and what this means for the school and for its students.

Accreditation bodies can support this by providing clear, easy-to-understand explanations for parents of the level of excellence that has been achieved by the school.

## International school accreditation trends 2012-2020

	2012	2015	2020
All international schools worldwide	6,967	8,688	11,451
International schools accredited worldwide	17%	15%	14%

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### 5. Fee point and value for money

17% of school admissions staff surveyed believed that their tuition fees are the deciding factor for parents selecting their school. The overwhelming majority (83%) felt the costs were only ‘somewhat important’ in that decision. However, prospective parents are likely to be somewhat self-selecting, with few parents who are unable to afford the published school fees likely to initiate contact with the school.

REGARDLESS OF THE REASON FOR LOWER FEES, MID-MARKET SCHOOLS MUST DELIVER A GOOD STANDARD OF EDUCATION IN COMPARISON TO THAT OF THE LOCAL PRIVATE OR STATE EDUCATION IF THEY ARE TO GENERATE DEMAND AND SUCCEED

50% of those researched believed that value for money is a ‘very important’ factor in parental motivation when choosing a school. 33% of school admissions staff think that value for money is ‘somewhat important’, with just 17% considering value for money as ‘not important’ to parents. This reflects a trend in recent years for the growth of ‘mid-market’ international schools, where tuition fee levels alone have carved a clearly defined group of schools. Data collected by ISC Research suggests there is more demand, in a growing number of countries, for international schools with tuition fees that are affordable. This is partly because more local families are seeking out good but

reasonably priced international schools, and also because more expatriate families are now funding their child’s education from their own salaries rather than having fees paid as part of a renumeration package.

As a result of mid-market tuition fees becoming a significant factor within the global international schools markets, ISC Research is, for the first time this year, publishing data on the mid-market international schools sector. Fees for this sector vary significantly from country to country, as do the fees for the premium sector of schools. With lower fees, comes the likelihood of a higher ratio of students to teacher per class, fewer highly experienced (and therefore costly) international teachers, fewer facilities, etc., or the lower fees may be possible because of the not-for-profit nature of the school, or favourable lease terms on a school premises, or government support. Regardless of the

reason for lower fees, mid-market schools must deliver a good standard of education in comparison to that of the local private or state education if they are to generate demand and succeed.

As a result of far fewer generous benefits packages for expatriates, and more selection and competition between international schools in most cities, company debentures and discounts are not as influential as they once were for some international schools. Only 42% of admissions staff who were surveyed considered company debentures or discounts to be 'somewhat important', and 58% believed they are now 'not important at all'.

## 6. Facilities and extra-curricular provision

Some international schools are offering the most state-of-the-art educational facilities available in the world. These include Broadway-style theatres, Olympic size and standard sports facilities, progressive music and art studios, innovative maker-spaces and science labs, extensive gardens and grounds, plus there is at least one international school with a bio dome, one with a planetarium, and another with a marine science centre. How do these, and other premium facilities influence parent interest?

Whilst 41% of the admissions representatives interviewed thought their facilities are 'very important' for parents, the remaining 59% thought they are 'somewhat important' but superseded by other factors which included teachers and academic outcomes.

From field research conducted throughout the year by ISC Research, there appears to be differences by country or region in the types of facilities most valued by parents. This is particularly so for sports, arts, and science facilities. For example: in some Middle Eastern countries, sports and arts facilities may be less valued by some parents due to cultural concerns or climate restrictions. In our survey of admissions staff, it was reported by several respondents that facilities tend to be of greater interest to the parents of children in younger grade levels/year groups with many parents of students in the senior years shifting their focus to academic successes and examination results.

Extra-curricular activities (ECAs) can tap into a student's personal passions and aspirations and, as a result, can be very appealing to parents, some who rate them as a deciding factor for their school selection. The breadth or emphasis of ECAs often go hand-in-hand with the facilities offered by the school and can play a key part in how the wider community perceives the school and its areas of focus. A school that promotes a holistic approach tends to place more emphasis on its wellbeing and nature-focused ECAs, whereas a school that prioritises particular higher education and career pathways may find its STEM or media or sport clubs gain more attention of potential parents.

Survey respondents were equally divided here with 50% believing that ECAs are 'very important' to parents, and the other 50% believing that they are 'somewhat important'.

## 7. Class sizes

Many international schools are recognised for their small class sizes and student-to-teacher ratios. When asked about class size as a key factor for the majority of parents, just 8% of respondents thought they were not an important factor. 50% of admissions staff believed that class sizes were 'somewhat important' to most parents, and 42% thought they were 'very important'.

It is likely that this is of greater influence now that more local parents are accessing international education and comparing international school offerings to state education provision where class sizes and student-to-teacher ratios are typically much higher.

In the short term, the need for social distancing within schools could mean that smaller class sizes are of even greater value for parents.

## 8. Brand reputation

One factor that can be reassuring for parents considering an international school is the reputation offered by an established brand, whether that be excellent academic results at a UK independent school which a parent may hope will be repeated at its international branch school, or the security of multiple campuses which can potentially help individual schools weather financial or recruitment challenges and offer additional benefits such as student exchanges.

25% OF THE ADMISSIONS STAFF SURVEYED THINK A SCHOOL BRAND REPUTATION IS 'SOMEWHAT IMPORTANT' WHILE 75% BELIEVE IT IS 'VERY IMPORTANT' TO MOST PARENTS WHEN SELECTING A SCHOOL

With the recent rise in independent schools opening overseas brands, as well as the increase in school groups operating own-brand campuses, we wanted to understand how important a school's brand name and reputation is to enrolment.

25% of the admissions staff surveyed think a school brand reputation is 'somewhat important' while 75% believe it is 'very important' to most parents when selecting a school.

In some countries, particularly in Asia, the school brand is extremely influential with wealthy, brand-conscious, aspirational parents selecting a school purely for the status it provides. Some highly reputable school brands, particularly those with

heritage and tradition from Britain, have very extensive waiting lists, with parents applying for early years entry for their child the moment they are born. This can also apply to international schools that have gained a very high reputation in their city as a result of longevity and proven academic track record, becoming a local 'brand' in and of themselves.

## 9. Parent community

The concept of an active parent community can be quite alien in countries where children's learning and progress is viewed as the sole responsibility of their teachers and school rather than a partnership between school, parents and the wider school community. Some international schools have traditionally found that a key to their success was the active engagement of student families and school staff, not only in supporting the students and their learning, but also in creating a stronger school community and ethos. This was particularly important when most families were expatriates and the school community became their extended 'family' while they were living away from home. For many of these schools, and for many expatriate teachers, this school community has remained a significant part of international school life.

Some of the more traditional community schools, particularly the American-oriented schools, spend a significant amount of time and effort involving parents in school life from the day they make their first enquiry and throughout their child's school journey, including graduation and alumni. Some of these more traditional expatriate international schools offer assistance with relocation and settling-in for the whole family not just the student, setting up buddy systems, coffee mornings, social events

and more. Others involve parents in their governing bodies, social and sports planning, and as brand ambassadors.

58% of the admissions staff surveyed in the December 2020 research felt that a parent community is ‘somewhat important’ to most parents. 25% said it is ‘very important’, and 16% said it was ‘not important’.

## 10. Location

In major cities where there are multiple international schools in existence, location can play a part in influencing a parent’s decision on their selection of an international school.

Anecdotal evidence suggests this is a greater factor for those parents of young children. However, many parents are willing for their child to travel significant distances in the pursuit of academic excellence or a particular curriculum. Good transport links to and from a school are extremely important in many cities and can be an important admissions message.

Some families relocate purely to access international education. This has been particularly notable by Chinese families in recent years, in order to access a more affordable international school education and one that does not have the strict curriculum restrictions required by the government in China<sup>9</sup>.

In most global cities today, major new residential development often involves land allocation for at least one international school, which is recognised as an important attraction<sup>10</sup>. The presence of a highly reputable international school also has the power to raise house prices in a neighbourhood<sup>11</sup>.

## 11. Not-for-profit and for-profit schools

Some parents choose not-for-profit schools because they understand school fees will go towards the continual improvement and redevelopment of the school. Admissions departments of not-for-profit schools need to be prepared to show potential parents how their fees are utilised to this effect.

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<sup>9</sup> Yangpeng, Z. (2018). [Chinese parents buy education and properties in Thailand as international school fees at home rise](#). *South China Morning Post*

<sup>10</sup> CBRE Thailand (2019). [Developers see potential in new international schools investments](#). *Thailand Business News*

<sup>11</sup> Lucking, L. (2020) [UK homes located near top international schools come with a premium](#). *Mansion Global*

# The impact of COVID-19 on school selection

The COVID-19 pandemic, the impact of which has been felt around the world, has had a significant effect on international schools in many ways. Most school campuses closed for face-to-face learning in or around March 2020 with some schools reopening, either fully or for a blended learning approach, in late summer term 2020, and others re-opening for the new 2020-2021 academic year. Since then, schools have had to remain agile in response to repeated campus closures, re-openings, strict safety measures, and isolation periods. A few countries have not re-opened school campuses for face-to-face learning since their initial closures<sup>12</sup>.

The admissions staff surveyed for this study all stated that recent parental enquiries had highlighted a number of new priorities for prospective parents which have arisen as a direct response to the COVID-19 pandemic. These include, though are not limited to, wellbeing, health and safety, affordability of school fees, and online learning provision.

## I. Online learning provision

Several international schools have been lauded for their continuation of education provision throughout the pandemic<sup>13</sup>. Some parents have contrasted this news with their child's own experiences which has led to them reaching out to their local international school. This has resulted in a new source of enquiries from families who previously may not have considered an international school as an option.

84% OF THE ADMISSIONS STAFF SURVEYED IN DECEMBER 2020 STATED THAT THEIR SCHOOL'S ONLINE LEARNING PROVISION IS EITHER 'IMPORTANT' OR 'VERY IMPORTANT' TO PARENTS

According to intelligence collected by ISC Research field researchers this academic year (2020-2021), as the pandemic has continued and parents acknowledge the likelihood of repeated campus closures or isolation periods, international schools have experienced increased enquiries regarding their distance learning provision.

84% of the admissions staff surveyed in December 2020 stated that their school's online learning provision is either 'important' or 'very important' to parents. The remaining 16% of

responses were all from international boarding schools which are currently offering full-time face-to-face learning with provisions for individuals and groups to isolate within the school campus.

## 2. Student wellbeing

After an initial period of complete isolation from teachers and classmates, with only distance learning accessible to them, many children have had to remain partially isolated as restrictions prohibiting normal pre-pandemic physical interaction remain.

<sup>12</sup> Rigby, J. (2020) [We've left behind the children: the countries where schools have been closed the longest](#). *The Telegraph*.

<sup>13</sup> BETT (2020) [Learning in a Crisis: Evidence-based recommendations for building a remote learning framework](#).

So much of the non-academic enriching curriculum of international schools, such as musical and drama productions and sports competitions, which are at the centre of developing ‘the whole child’, may be missing for a time as social distancing restricts opportunities for physical interaction. There is a small, but notable, cohort of families who have still not allowed their children to return to face-to-face learning, even where it is possible, as a result of health fears. There also remain some countries, particularly in the Gulf and Africa, where school campuses have not yet reopened for face-to-face learning at all and as a result students have not had physical contact with their school community for almost a year.

All of this has had an impact on student wellbeing. Heads of international schools are reporting to the ISC Research field research team, of increased mental health and behavioural problems amongst their students, many of whom continue to struggle with challenges and adjustments to their daily routines. This is affecting all ages; those facing examination changes, those struggling with pathway decisions, those children with technology or support limitations at home, as well as all children missing physical interaction with friends and teachers.

66% OF THE ADMISSIONS STAFF SURVEYED STATED THAT WELLBEING SUPPORT PROVIDED BY A SCHOOL IS NOW CONSIDERED A ‘VERY IMPORTANT’ FACTOR FOR PARENTS DURING THEIR SCHOOL SELECTION

Parents are increasingly seeking out schools that are seen to be providing outstanding pastoral care alongside strong academics to support their students through this challenging time. According to intelligence collected by ISC Research field researchers, there has also been an increased interest by prospective parents in international schools that are seen to be providing parent and staff wellbeing support.

66% of the admissions staff surveyed stated that wellbeing support provided by a school is now considered a ‘very important’ factor for parents during their school selection. The remaining 30% stated that wellbeing is ‘important’.

### 3. Health and safety

International school admissions staff say that health and safety procedures are increasingly being questioned by prospective parents. 42% of the admissions staff surveyed said health and safety is now considered ‘very important’ by parents, with the remaining 58% of respondents stating it is ‘important’.

Prospective parents are seeking clarity on school procedures for sanitisation, social distancing, personal protective equipment, temperature checks, isolation, transportation of students, and various other protocols introduced since the outbreak of the pandemic.

### 4. School fees

The economic impact of COVID-19 has reduced disposable income for some families and, with that, their access to private education. International schools around the world have reported to ISC Research of some students being moved to more affordable international schools, as well as requests from parents for payment plans, fee discounts, bursaries or loans to cover school fees in the short-term.

ISC Research has tracked international school demand and enrolment levels through previous regional and worldwide crises including the global financial crash of 2008<sup>14</sup>. This research suggests that education is valued extremely highly by many families, particularly by families throughout Asia. During the recession following the 2008 financial crisis, many parents kept their children in international schools even though they were financially impacted in other aspects of their lives.

There is concern by some families of school stability and ensuring continuity of education for their child. A few international schools, particularly in China, have reported to ISC Research of increased parental enquiries regarding the school's financial status as a result of reduced enrolment or lower school fees due to COVID-19. One school also reported receiving parent enquiries about the school's crisis management strategy.

The economic impact to international schools may not be fully realised until the 2021-2022 academic year. ISC Research will continue to gather market data and publish enrolment and capacity trends during this time.

## 5. Contact time

Parental contact with their child's school and class teachers has increased during COVID-19. According to ISC Research field researchers, this is common amongst international schools in all regions of the world. Contact time and accessibility to teachers and key staff will be a question more parents are likely to ask during admissions enquiries in the future.

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<sup>14</sup> ISC Research (2020). [How have international schools responded to market crises?](#)

## The impact of COVID-19 on admissions applications

A common challenge faced by admissions teams this academic year was the difficulty, and in some cases impossibility, of holding physical open days and tours. Campus closures and COVID-19 restrictions have meant that, even those schools that are able to host potential families for a visit, are generally doing so in a very limited way. Admissions staff report that this has led to their school developing or improving their online admissions provision including virtual tours, virtual open days, online interviews and, where required, admission assessments. Some schools have permanently moved to an entirely online admissions process although several admissions professionals commented on the potential negative impact of this:

*“Zoom is great and there are plenty of positives about new technologies, but at the heart of things, ‘admissions’ is about connecting with people, and we will always feel those connections are most authentic and meaningful in person, on campus”* - Courtney Knight, Advancement and Engagement Director, International School of Paris

Admissions staff who were surveyed said major admissions challenges this year, particularly for their expatriate families, are as a result of travel uncertainties and macro-economic trends. Travel restrictions have impacted potential parents' ability to visit schools and, in some cases for families to relocate. Similarly, the economic impact of COVID-19 has resulted in multinational companies scaling back on relocations as well as generous benefits packages including the payment or contribution to dependents' school tuition fees resulting in the selection of more affordable schools by some families.

Some families “have asked for financial aid or simply left in search of a school with lower costs”. - Wendy Van Bramer, Director of Admissions and Alumni, United World College Thailand

59% of the admissions staff surveyed reported their student enrolment for the 2020-2021 academic year has increased as a result of the impact of COVID-19. Some of these schools say they have experienced substantial change in their student demographic since the pandemic so have also lost students, but overall, their enrolment figures are higher than recent years.

In some cases, admissions staff attribute this to border restrictions and the comparative safety of their country meaning some expatriate families have remained in country longer than initially intended. But the vast majority ascribed this enrolment increase to the quality of their online or distance learning provision and the resulting increase in reputation. As one admissions leader stated: “*The poor execution of online learning by other schools has generated interest in our service offering.*”

Looking to admissions for the 2021-2022 academic year, there were a variety of responses from admissions staff concerning flight restrictions and border closures for expatriate families and, in some countries, government restrictions limiting local student enrolments.

Of most concern for admissions staff preparing for 2021-2022 enrolments is the increased challenge of strategic planning. Concerns included:

*“Managing leavers and not knowing where spaces will arise in full year groups.”* - Rachel Chadwick, Director of Admissions, Wellington College International, Shanghai

*“The (un)predictability of enrolment demand and the related yield matriculation.”*- Courtney Knight, Advancement and Engagement Director at the International School of Paris

*“The pandemic means that countries who traditionally plan a long time ahead are even delaying things, as they wait to see how things develop. This has a knock-on effect for strategic and long-term planning and provision.”*- Sarah Frei, Head of Admissions, Brillantmont International School, Switzerland



## How parents research international schools

Parents research prospective international schools for their children in a wide range of ways. This differs depending on whether the family is relocating to a new location, or if they are already living in the vicinity of the schools they are considering.

In the December 2020 survey of admissions staff, ISC Research asked about the most successful marketing channels for attracting prospective parents, and if these had differed as a result of COVID-19.

Respondents said social media has had the 'most impact' for engaging new prospective parents this year (41%), as it has also done so for previous years (42%). 27% of respondents said website advertising has had major marketing impact in previous years, but only 18% said it has had a major impact this year.

7.7% of respondents said that, in previous years, school fairs were considered a successful marketing activity for raising awareness of the school. They were not mentioned as a top admissions source during COVID-19.

OPEN DAYS (BOTH PHYSICAL AND VIRTUAL) HAVE BEEN MORE SUCCESSFUL THIS YEAR THAN IN PREVIOUS YEARS, WITH 14% OF ADMISSIONS PROFESSIONALS STATING THEY ARE HAVING THE 'MOST IMPACT' FOR ATTRACTING PROSPECTIVE PARENTS THIS YEAR COMPARED TO 8% IN PREVIOUS YEARS

Open days (both physical and virtual) have been more successful this year than in previous years, with 14% of admissions professionals stating they are having the 'most impact' for attracting prospective parents this year compared to 8% in previous years. Admissions leaders attributed this to two factors: Those schools able to conduct physical open days have an advantage over schools that are not hosting physical events, and

those schools hosting virtual open days - and doing them well - are benefiting from their investment of time and cost to develop a successful virtual open day experience for prospective families. Word of mouth, school agents and content marketing are still considered valuable routes to market during COVID-19 restrictions, according to 83% of those surveyed.

Admissions staff were also asked about the main sources of their admissions applications.

66% of the respondents said that 'word of mouth' is their top source of admissions applications. School websites are the second most common route with 25% of respondents saying the school website is the source for the majority of applications. 41% stated the school website is the second most common source of application, and the remaining 33% stated it is the third most common source. With continued restrictions on physical visits to schools for prospective parents, virtual tours and school videos on school websites<sup>15</sup> will be more important this year than ever before. So too will be virtual admissions engagement and procedures<sup>16</sup>.

<sup>15</sup> Stoltz, M. (2020, June). [Virtual ways out of the crisis](#) International School Leader Magazine, issue 14 pp.26-28

<sup>16</sup> Major, M. (2020, March). [Five tips for a compelling virtual admissions experience](#). Finalsite blog.

Social media, including Facebook and Twitter, is also considered a very important source for admissions applications. 50% of all admissions staff surveyed said social media is either their second or third most common source for applications.

Respondents also mentioned a range of other main sources for admissions applications. These included open days, company human resource departments, education consultants, relocation agents, specialised and expatriate websites including [whichschooladvisor.com](http://whichschooladvisor.com) and [expatica.com](http://expatica.com), and feeder schools.



## **Conclusion**

From a global perspective, COVID-19 has not, to date, diminished demand for international school education and core motivations for parents selecting an international school remain. Evidence suggests that in some cities, the market could experience more demand as a result of COVID-19 while being negatively affected in other locations.

The impact of COVID-19 has resulted in parents making additional demands on their child's school including structured student wellbeing provision, rigorous distance learning, and comprehensive health and safety protocols. Many international schools delivered this to an adequate or good standard during the early phase of the pandemic. Prospective parents are now basing their decisions on evidence of this provision and the school's ability to respond to a crisis, in addition to the other education factors that motivate them.

Most parents want – and require – a fee point they can personally afford.

ISC Research anticipates a period of fluctuation, and increased demand for and upon the international schools market. As a result, admissions departments need to be informed, agile and strategic, and have representation within senior leadership, or be proactively supported by the senior leadership team, for an international school to succeed into the future.

The desire for international school education may well remain, but parents want 'more bang for their buck'; they expect value for money and that no longer just means the provision of a pathway to global higher education. Parents require the full service for their child while they prepare to reach that destination.

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