



WHITE PAPER

The growing demand for international schools
within a mid-market fee point



May 2021

THE GROWING DEMAND FOR INTERNATIONAL SCHOOLS WITHIN A MID-MARKET FEE POINT

The last two academic years have shown a notable growth in demand for international schools with a mid-market fee point. They are now a significant sector within the global international schools market.

Mid-market fee international schools meet the educational needs of a large population of families in most countries.

A lower fee point does not necessarily imply compromised education standards. There are many reasons why school fees at a lower price point to others may be offered within a locality. This white paper explores some of these reasons, why they vary from country to country, and the impact of lower fees on schools and their offerings.

More detailed market analysis, including the impact of COVID-19 on enrolment at different international school types is available from ISC Research.

CONTENTS

Mid-market fee sector global overview 4

How ISC Research identifies international schools within the mid-market fee sector 4

Is enrolment demand shifting between mid-market fee and premium fee schools? 4

Why is demand for mid-market fee schools growing? 6

What does a mid-market fee international school look like? 6

Mid-market fee sector country focus 9

Mid-market fees: UAE 10

Mid-market fees: Qatar 13

Mid-market fees: China 16

Mid-market fees: Japan 19

Mid-market fees: Malaysia 22

Mid-market fees: Germany 25

Summary 28

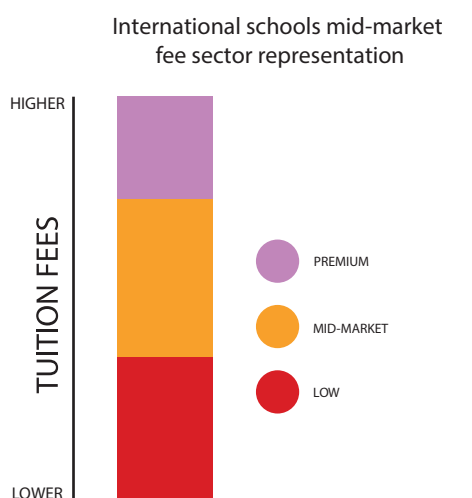
MID-MARKET FEE SECTOR GLOBAL OVERVIEW



MID-MARKET FEE SECTOR GLOBAL OVERVIEW

HOW ISC RESEARCH IDENTIFIES INTERNATIONAL SCHOOLS WITHIN THE MID-MARKET FEE SECTOR

ISC Research classifies international schools¹ within 'mid-market fee' or 'premium fee' sectors based purely on their tuition fees. These sectors are identified by comparing a school's tuition fees with country-specific or city-specific fee thresholds. These fee thresholds are calculated on the basis of the range of international school tuition fees in each country or city. It is also based on deep knowledge of key national markets that ISC Research acquires through continual in-country qualitative research and relationships with a wide breadth of international school leaders and education experts.



Fee sectors should not convey any presumption of school or educational quality.

The premium fee sector encompasses a certain percentage group of international schools that offer the highest school fees within any given market (typically, but not restricted to, 25%). The mid-market fee sector encompasses the next percentage group of international schools (typically, but not restricted to, the following 40% of the market). Rigid percentages do not always apply, and they vary by country. They can also differ between some cities, notably in China and the United Arab Emirates where there are very different school fee ranges from city to city within the international school sector. Shanghai and Dubai are two examples of cities that fluctuate from the country norm.

Fee sectors should not convey any presumption of school or educational quality. A premium fee international school may charge higher fees because it occupies a prime location in an expensive city. A mid-market fee international school may be able to charge mid-range fees because it has very favourable lease terms on its premises or is run on a not-for-profit basis. These two hypothetical schools could offer a very similar quality of education and very similar facilities.

IS ENROLMENT DEMAND SHIFTING BETWEEN MID-MARKET FEE AND PREMIUM FEE SCHOOLS?

The international schools market emerged in response to the needs of Western expatriates. It expanded prolifically as employment of Western expatriates increased within developing countries. With the expansion of the international schools market, came the realisation of international schools as an

Supply and demand are not the only factors influencing fee point.

education choice by more parents. Local families, and expatriates originating from all countries, have increasingly selected international schools in preference to local state schools². Reasons vary, but consistently relate to language of learning, education quality and qualifications. With more demand came market growth and with that came school choice and competition.

Supply and demand are not the only factors influencing fee point. Some international schools were established specifically with the purpose of offering a more accessible fee point, and some school fees are influenced by external factors such as government requirements or allowances.

Factors affecting an economy, such as the oil and gas crisis in the Middle East and South Eastern Asia, or the global pandemic, have had a noticeable impact on the movement of students between international schools of different fee points.

The ramifications of COVID-19 on many businesses and, as a result, incomes, has been extensive and has impacted many families globally, some of who will have found it necessary to move their child from a premium fee international school to a mid-market fee international school.

¹ ISC Research considers a school as an international school for market research purposes if the school delivers a curriculum to any combination of pre-school, primary or secondary students, wholly or partly in English outside an English-speaking country, or, if a school in a country where English is one of the official languages, offers an English-medium curriculum other than the country's national curriculum and the school is international in its orientation.

² ISC Research, (2021, February). [Why parents select an international school, and the impact of COVID-19 on school choice](#)



WHY IS DEMAND FOR MID-MARKET FEE SCHOOLS GROWING?

There is increasing demand for mid-market fee international schools from local citizens of a number of countries who are seeking out good international education for their children in their neighbourhoods or close to home within a price point they can afford. In addition, more expatriate families are having to fund their children's education from their own salaries rather than have fees paid as part of a remuneration package, which was a traditionally popular incentive for people to relocate. As a result, many expatriates are now seeking good education at an affordable price point.

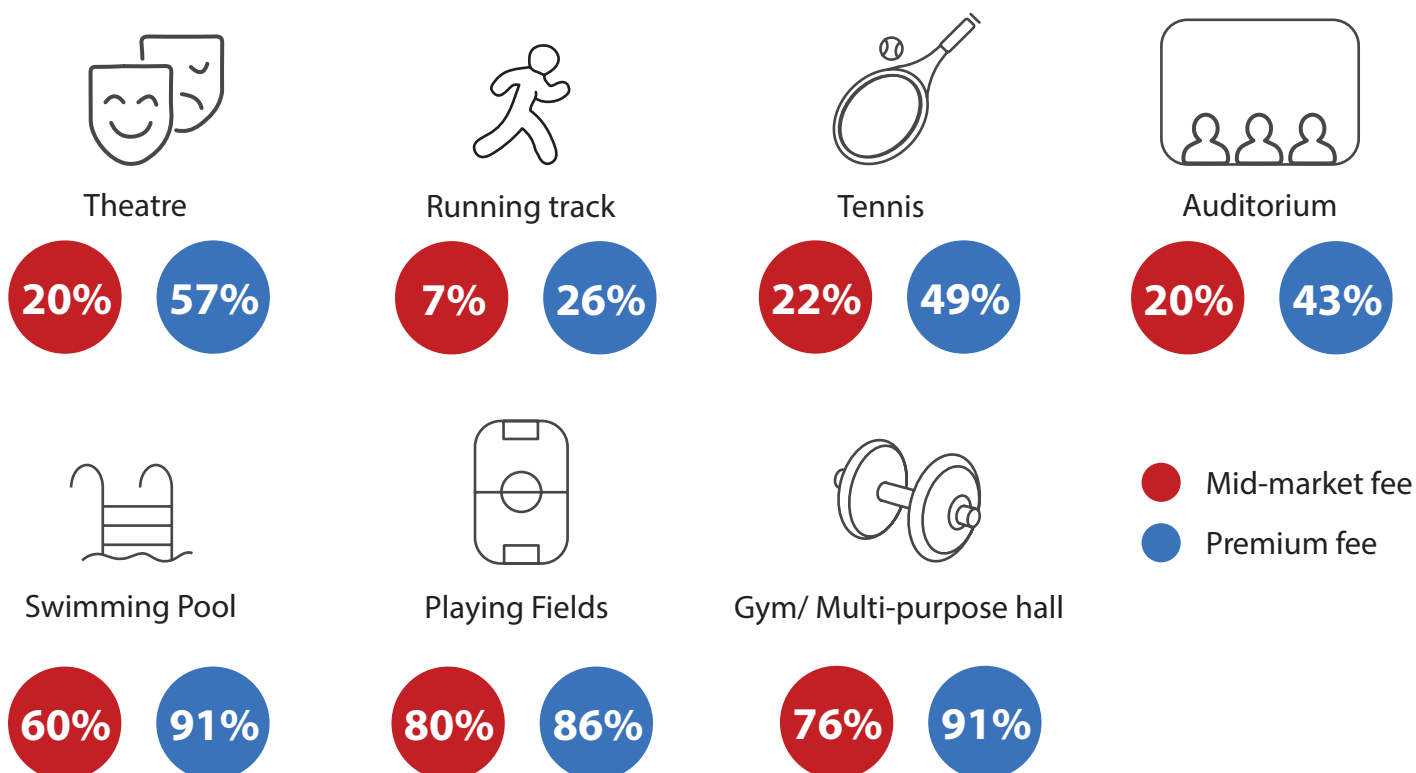
These factors combined are resulting in increased demand for more affordable international schools whose fees can be paid for by a family's own income. As a result of global education and increased worldwide recognition of some skills, this globalised balancing of salaries and benefits is likely to continue³.

WHAT DOES A MID-MARKET FEE INTERNATIONAL SCHOOL LOOK LIKE?

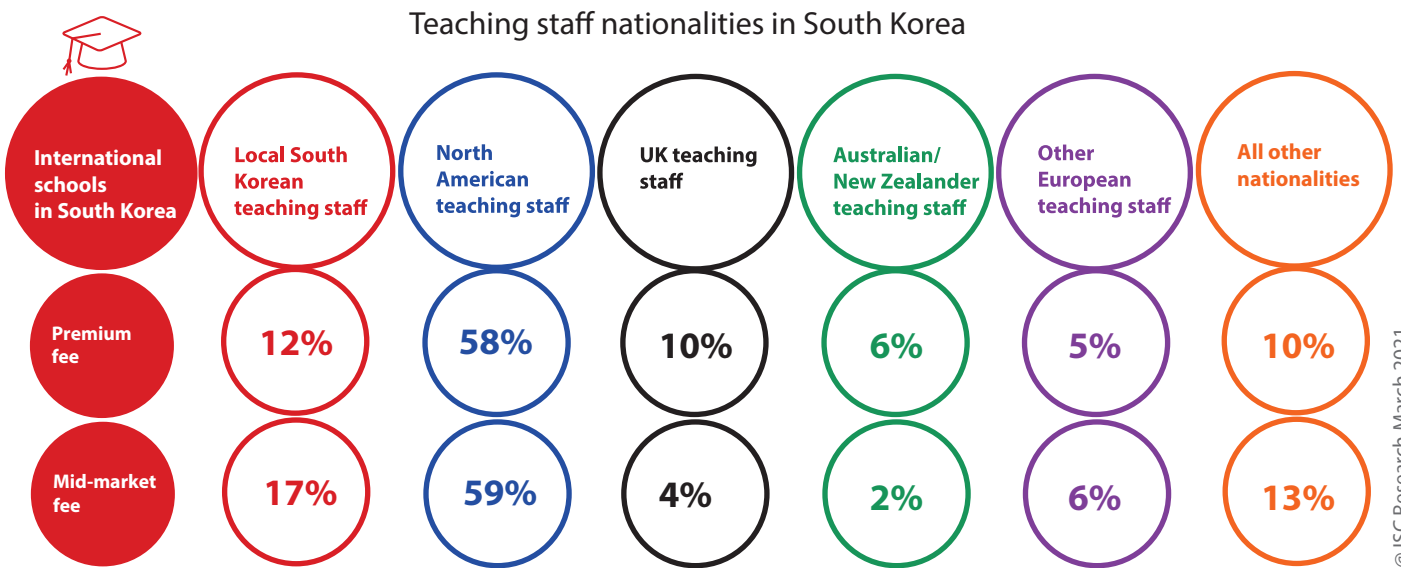
Because schools that fall within the mid-market fee sector fluctuate based on current market demand, school size, orientation and teaching and learning approaches may be similar to premium fee schools. Trends do occur although these can vary from country to country.

As an example, in analysing the facilities of international schools in Indonesia this academic year, those that currently fall within the mid-market fee sector typically have gyms or multi-purpose halls and playing fields, and may have at least one or more additional facilities such as a theatre or swimming pool. This contrasts with international schools in Indonesia that currently fall within the premium fee sector of schools which generally have many more facilities.

Facilities available in international schools in Indonesia



Teaching staff nationalities can also look significantly different between premium fee and mid-market fee schools in some countries. As an example, when analysing international schools in South Korea this academic year, those that currently fall within the mid-market fee sector typically have a lower percentage of staff originating from the UK and Australia/New Zealand. However, staff nationality may be driven by the school brand or the curricula offered at the school rather than the fee point. This can vary from country to country.



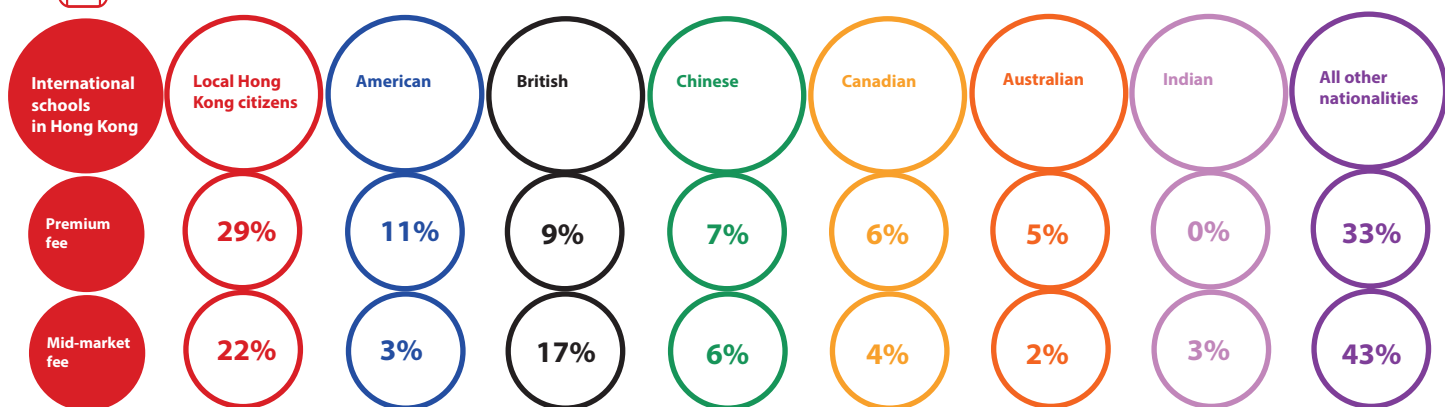
Teaching staff benefit packages, particularly related to dependent tuition fees, housing and travel allowances are typically more limited in mid-market fee schools compared to premium fee schools.

Student nationalities can contrast noticeably between mid-market fee and premium fee schools too. For example, in analysing international schools in Hong Kong this academic year, those that currently fall within the premium fee sector typically have a higher percentage of American, Chinese and local students, while the mid-market fee schools typically have a higher percentage of British and Indian students. This may relate to the employee demographics and remuneration packages of leading multinationals present within a country, or it may suggest that student nationality is driven more by brand or curricula choices rather than the fee point.

³ International Labour Organization (2020, January). [World employment and social outlook: trends 2020](#)



Student nationalities in Hong Kong



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Curriculum does not necessarily influence fee sector although sometimes, particularly where the International Baccalaureate Diploma Programme dominates the premium sector, this can be an influence. However, this is not always the case. Currently, for example, in China and Malaysia, there are more premium fee than mid-market fee schools offering a UK curriculum, but fewer in Qatar and the UAE. In China and the UAE, there are more premium fee than mid-market fee schools offering the International Baccalaureate Diploma Programme, but more mid-market fee schools doing so in Japan and Germany.

Accreditation does not necessarily impact fee sector either, although for most countries there are more accredited international schools within the premium fee sector. This is not the case however in Qatar where slightly more mid-market fee international schools are accredited.



A photograph of two women wearing hijabs, one pink and one blue, smiling and looking at documents. The woman in the blue hijab is pointing at a document with a pen. The image has a blue tint.

MID-MARKET FEE SECTOR COUNTRY FOCUS

MID-MARKET FEES: UAE



UAE international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	140,500	167,900	4.2%	3.6%	\$12,852	\$21,652
Mid-market fee sector	158,700	173,300	3.7%	1.8%	\$7,003	\$8,660

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Enrolment at both the UAE's premium fee and mid-market fee schools have grown steadily since 2016 although the rate of enrolment growth in the mid-market fee sector slowed down more than the rate of growth in the premium fee sector during the pandemic. This may be due to factors other than the pandemic.

Enrolment in the UAE's mid-market fee sector is expected to see most growth in coming years in line with a drive to accommodate local families in international schools as part of the government's Vision 2021 plan⁴.

⁴ ISC Research (2020, June). [United Arab Emirates International Schools Market Intelligence Report](#)



CULTURAL VALUES, LANGUAGE, RETAINING STAFF

Ataullah Parkar is the Principal of Dubai's International School of Creative Science which opened in 2016 offering a segregated international education with options for both British and American curriculum that currently falls within the mid-market fee sector. The school is currently experiencing a fee freeze along with all other private schools across the country but in more normal times, fee increases are restricted within the UAE's KHDA (Knowledge and Human Development Authority) inspection framework. Ataullah describes how the school has found a position within Dubai's competitive education landscape:

"Many new schools that are coming into Dubai at this point are mid-market. It is very much about volume on campus and scaling up. The challenge is maintaining standards as the student volume grows. Reputation plays a key part; word of mouth reputation counts for a lot.

"There are lots of local parents, or parents of other Arab nationalities, who want an affordable fee point for their child's education, but also don't want values to be compromised and they want the Arabic language to be preserved, particularly when their child gets to older year groups. More and more, there is a narrative amongst local parents that they do need to preserve their children's language. Every school has to deliver the Arabic language, but some, regardless of fee level, do it better than others. There is a recognition that we do it well and there is a reputation around that, and around our Arab and Islamic values, and our segregation.

"There was a very conscious decision to go for mid-market fee because we have the nuance of the school in terms of the faith element and the vision and that is still quite unique in Dubai.

"I think parents have held by the school during COVID; we're doing pretty at this point in the year. I think there is a sense of loyalty, so as long as the market remains balanced, the highest price schools are the hardest hit.

"Our challenge, at this price point, is around the retention of our staff. We pay fairly competitively, however we must recognise that our competitors from a student perspective are very different to our competitors from a staff perspective and often we don't differentiate the two. When it comes to teachers, our competitors are other British schools everywhere, and those schools tend to have a higher fee point. As a fast growing school, we get teachers in the door, there is a lot of training and development that the teachers get naturally because of the journey. But by two or three years down the line, we tend to lose middle leaders and that's something we are trying to figure out to retain them beyond that point."



INTERNATIONAL SCHOOL OF CREATIVE SCIENCE, DUBAI

MID-MARKET FEES: QATAR



Qatar international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	23,600	31,400	5.9%	5.9%	\$11,548	\$19,694
Mid-market fee sector	43,100	60,400	4.25%	7.0%	\$6,265	\$11,890

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Enrolment at Qatar's mid-market fee schools has increased dramatically during the 2020-2021 academic year as a result of the impact of COVID-19. The premium fee sector of the international schools market in Qatar is near saturation and notable demand has shifted to the mid-market fee schools, several of which are full and have large waiting lists⁵.

CASE STUDY



GOOD QUALITY, OWN BUILDINGS, WELLBEING

In Qatar, the Ministry sets and controls the fees of international schools which, until 2015, was a challenge for Deane Baker, Principal at Qatar International School. However, since then, he says, it's become a blessing as the market has shifted:

"The massive reduction in the oil price, then the blockade, and now the pandemic have all made the market more volatile and increasingly competitive. More international schools have opened as well, flooding the market with places, especially in the higher fee end. We are still around 15% below where I would like [our fees] to be relative to the other high-end schools, but we are full with waiting lists, which most others are not now. We have benefited from some 'cascading down' of students as budgets and packages have been cut for parents.

"People want good quality at a sensible price because no one has as much money as they used to. Also, with more competition in the market generally, the most successful players are those who can deliver a quality provision at reduced cost.

"We own our own buildings and 90% of our own accommodation. The owner has helped me to control a number of key costs such as school rent and staff accommodation (paid to ourselves), which basically means we can still make a profit but with margins that have allowed me to compete above our fee structure, in salaries for example. We can do this because of the control we have on the major costs and an owner who is not solely focused on profit.

"When anyone visits, they recognise instantly the feel of a happy school. This is something we work hard to cultivate and it doesn't come by accident. Wellbeing awareness and proactivity is important."

⁵ ISC Research (2020, November). [Qatar International Schools Market Intelligence Report](#)



QATAR INTERNATIONAL SCHOOL

MID-MARKET FEES: CHINA



China international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	88,700	149,800	12.6%	11.0%	\$23,966	\$26,237
Mid-market fee sector	82,000	120,600	12.5%	8.0%	\$15,245	\$18,161

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China's bilingual schools, which are accessible to Chinese nationals, are in very high demand and many have waiting lists. It is within these schools (rather than the schools for the children of foreign nationals) where dramatic enrolment growth has occurred in recent years. Enrolment has been impacted most in the mid-market fee schools as a result of the pandemic.

School selection is driven by various factors including school brand prestige and the academic success of students, particularly their pathways to certain recognised universities such as the US Ivy League universities or Britain's Oxford and Cambridge universities. Demand for an international education close to home is so high that bilingual schools in China in both the premium and mid-market fee sectors are in very high demand⁶.



RECRUITMENT, MEDIA IMPACT, FOUNDATION SUPPORT

Mark Bishop is Executive Headmaster at YK Pao School, a not-for-profit private day and boarding school for 1,500 children with three campuses in Shanghai, China where fee rises and student admissions are restricted by the government. The school is allowed to enrol Chinese nationals and expatriates. Mark says leading a school at a mid-market fee point can be challenging in several ways:

“Attracting outstanding staff is the main challenge. We are having to compete with the top international schools for the best international teachers, and we are also inevitably competing with the newer Chinese bilingual schools and many will start paying over the odds initially to attract staff. We definitely look globally for our staff and don’t just rely on all the normal recruiting agencies. In our high school, where we do IGCSE and IB, it’s about 60% expat teachers 40% Chinese, but many of those Chinese teachers are Western university educated. Within Chinese subjects, we do have people who have been educated solely in China where there are some outstanding universities. However, for IGCSE and IB teaching, it’s that combination of Chinese primary and secondary education with Western undergraduate and Masters, that tends to be the most compelling combination.

“We are very fortunate in that we have a Foundation behind us so a lot of the funding for new buildings comes from the Foundation rather than fee income, meaning more fee income can go on the key issues of recruiting top teachers and resourcing the school. Being a not-for-profit school means we don’t have to worry about shareholders so everything goes back into the school which is great. Our facilities are similar to the resources of a top UK independent school: all three campuses have (or are about to have) indoor swimming pools, indoor gyms, theatres, specialist music rooms and so on.

“There is a fast-growing middle class here who want access to high quality education. University admissions is what Chinese parents in particular are very interested in and in the last two years we have had exceptional offers from top universities in the US and UK. That has attracted a lot of people, so our applications at the high school have more than doubled in a year. It also helped that The Hurun Report⁷ said we were the top international school in China, and for some parents that matters. I think there has been a ‘flight to quality’ so the top schools in China have benefitted so I’m not convinced the market is particularly price sensitive for us. Parents are willing to pay for quality.

“There are some parents who would have previously sent their children to US or UK boarding schools, who have been unable to, or have been discouraged as a result not just of COVID but other stories in the media, such as the ‘Asian hate’ issue in the US and the ‘Everyone’s Invited’ issues in UK independent schools, so there’s a perfect storm that is unsettling people which has meant an increase in demand for high quality schools in China.”

⁶ ISC Research (2020, July). [China International Schools Market Intelligence Report](#)

⁷ Hurun (2021, April). [Hurun Education Top International Schools in China 2021](#)



YK PAO SCHOOL, CHINA

MID-MARKET FEES: JAPAN



Japan international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	24,700	28,300	3.7%	2.8%	\$18,175	\$20,961
Mid-market fee sector	10,900	12,300	3.9%	2.4%	\$12,260	\$13,197

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With attendance at international schools during compulsory education currently prohibited for Japanese nationals unless approval is granted, most international school demand is from expatriates. In order to maintain a healthy economy, Japan will be increasingly reliant on expatriates, some of whom will require affordable international education⁸.

Enrolment at both premium fee and mid-market fee international schools has grown slowly in the last five years. A small market share in both sectors has been lost due to COVID-19.



LOCATION, NEW ENROLMENT SOURCES, TEACHER RETENTION

Columbia International School is a small, 230 student Canadian bilingual school in Tokorozawa, Japan. Principal Barrie McCliggot explains the reasoning for the school's tuition fee positioning:

"From a location perspective we are outside the main population belt so the cost of our real estate is cheaper, but also away from the main source of students interested in international school type education." Regardless of location limitations, the school is experiencing admissions enquiries from wider sources. "We have seen an increase in our enrolment lately due to overseas Japanese students returning from the United States or Canada due to COVID-19 challenges, also students inside Japan, maybe due to favourable press associated with international schools like us who were tech-ready for online schooling. Further globalisation makes people aware of educational needs that may not be offered in local schools [including] English and global citizenship as well as technology.

"There has also been a big increase in enquiries from China and Hong Kong of late. Japan is seen as safe with a good reputation for education."

"Staffing can be a challenge for some mid-market fee schools due to fee income and, as a result, the ability to offer salaries that compete with premium fee schools. As a result, the school has focused on selecting staff who are attracted to the location for the longer-term and helping them to develop specific skills: "When I first became the headteacher 17 or so years ago, I was frustrated with the '2 or 3 years and gone' approach to teacher contracts as it was difficult to embed programmes with consistency. Around that time there were many Canadian teachers in Japan at other international schools or teaching English, as the employment opportunities for teachers in Canada were poor. So, when hiring I was looking for people who had made a connection and commitment to Japan (partner, housing, hobbies). As a result, our teacher turnover is very low; we have a school average of 17 years' service so far, and have continued with a strong PD programme that has focused on ESL. Staffing really is not a challenge of late. We receive a great deal of qualified enquiries from experienced Canadian teachers in China or new teachers from Canada. But I still think getting a committed core group of teachers, and continuing to upskill your staff, is better than enduring the unknowns, disruptions, and the expense of regularly bringing in new teaching staff."

⁸ ISC Research, (2021, May). [Japan International Schools Market Intelligence Report](#)



COLUMBIA INTERNATIONAL SCHOOL

MID-MARKET FEES: MALAYSIA



Malaysia international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	19,100	25,600	8.7%	6.0%	\$12,806	\$14,779
Mid-market fee sector	32,400	41,800	7.3%	5.2%	\$5,966	\$7,181

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Enrolment at Malaysia's premium fee and mid-market fee schools has grown steadily since 2016 although both sectors have seen a small enrolment decline as a result of COVID-19.

There is a growing demand from local Malaysian families for international education at a price point that is affordable for them⁹.

⁹ ISC Research (2020, November). [Malaysia International Schools Market Intelligence Report](#)

CASE STUDY



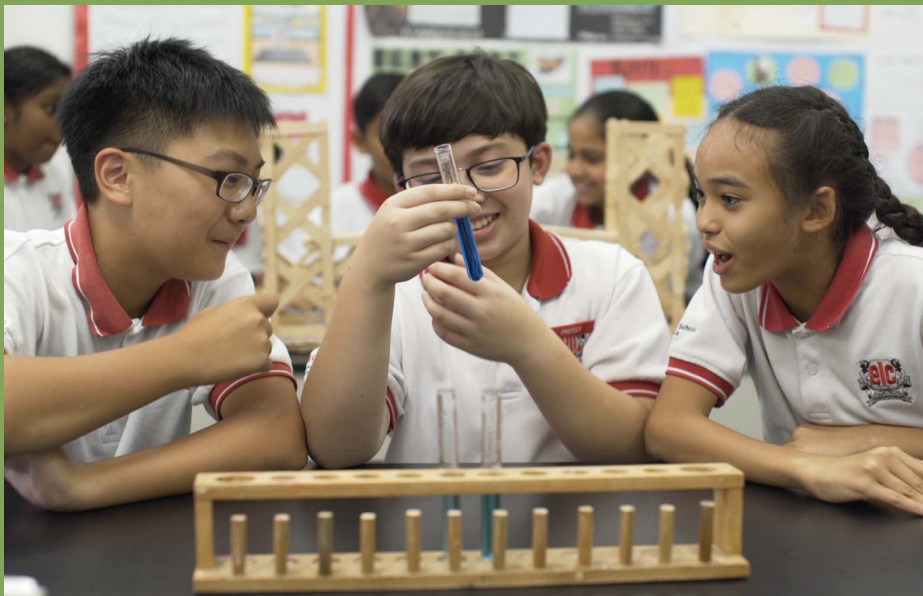
TRADITION, ACCESS, PERCEPTION

Rajan Kaloo is Director of Services at elc international school in Malaysia. The school was founded primarily by his mother, Margaret, in 1987 with, what was felt to be, a more affordable fee structure. Rajan explains: "My parents couldn't afford international school fees in the '80s and that was a bitter pill to swallow as we were not 'poor'. Following a minor argument between my parents, with my dad getting frustrated that nothing was going to satisfy my mum, he said 'if she thought she could do a better job, to go ahead and do it', and the rest, as they say, is history."

Rajan's view is that resilience and an engrained value system are essential in maintaining and managing a school in Malaysia at a mid-price point. "Hard work, long hours, never taking the easy path, arguments with everyone, pig-headedness have all been necessary. Thankfully over the years we have built a good reputation as an 'academic' institution with a published track record of results. This means that most of our demand comes from the Asian market who are typically more focused on academic performance. This can be difficult to manage however as we do get a lot of applications from Korean and Indian nationals and, as we try to ensure there is fair(er) distribution of cultures so that the playground doesn't become dominated by any one group, this can lead to enrolment difficulties. The easiest path would be to take anyone and everyone, but we feel that diminishes the whole experience. Of course, our detractors are vocal on this and many other aspects of our operation. However, generally speaking (and despite the many non-academic activities on offer) the strongest complaints; 'too traditional', 'too academically orientated', are nevertheless interpreted as positives by many other parents, thus feeding our reputation. We do not apologise for what we are, and we keep trying to push the envelope in terms of academic expectation."

On the topic of COVID, Rajan highlighted that "recently we have been getting many applications from parents seeking to transfer from more expensive schools. Most have no idea who we are and what we are about, so it remains to be seen how many of those applications translate into actual enrolment. Sadly, just like there is a trickle down from the more expensive schools, we too are losing students to less expensive schools. This is on top of families who have had to leave Malaysia or simply do not agree with the way we are dealing with COVID. Whilst this has led to a tightening of the belt, many difficult conversations with parents, and a feeling of unease about the future, we hope that with vaccines we will see a gradual return to what we once took for granted, and the beginnings of economic recovery for all."

Regarding the future of the Malaysian international schools' market, Rajan's opinion is that "many families are fooled into believing the more expensive the school, the better," he says. "Families can often be prepared to put themselves in serious debt to give their children what they perceive to be a better chance at life. At the end of the day, I do not see too many operators of international schools being brave and starting (and keeping) a school at more affordable levels. There is too much desire from operators to keep up with the Jones' and supply high-end finishes. Which, to be honest, is the easy path in the 'put fees up, offer more 'bling' and the families will come' mentality. Of course, if social distancing, fears of infection and eLearning persist for another year, we are likely going to see major shifts in the way we all operate. However, I doubt that the price cuts and reduced admission fees brought about by the economic downturn will be maintained, and you can expect many schools will implement a major spike in charges as soon as they can."



ELC INTERNATIONAL SCHOOL, MALAYSIA

MID-MARKET FEES: GERMANY



Germany international schools by fee sector	Total English-medium enrolment 2016	Total English-medium enrolment 2021	CAGR of student enrolment 2016-2020	CAGR of student enrolment 2016-2021	Current average primary school fees (USD)	Current average secondary school fees (USD)
Premium fee sector	19,000	18,400	-1.4%	-0.6%	\$18,169	\$20,010
Mid-market fee sector	21,200	21,400	-0.8%	0.2%	\$17,087	\$19,059

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Enrolment at all international school types in Germany has hardly moved in five years¹⁰. Even though there was some thought that the UK's departure from the European Union could have an increased demand for international schooling in some cities in Germany, to date there has been no change. COVID-19 has had no impact either, other than a very slight shift towards the mid-market fee schools.

¹⁰ ISC Research (2020, July). [Global Opportunities Report 2020](#)



LOCATION, LEARNING APPROACH, TECHNOLOGY

Tom Egerton is the Director of Franconian International School in Erlangen, Germany. The school is a not-for-profit school for approximately 650 students delivering the International Primary Curriculum and moving on to the International Baccalaureate programmes. Fees are currently regulated by the regional government, with increases allowed in line with inflation only, to enable accessibility to more students. Tom describes the school:

“We have comprehensive libraries: one in the primary and two in the secondary, a lovely theatre, two gyms that can be split into multiple spaces, and a half field. We have counsellors in each of the sections who have been of great assistance, especially during this time of COVID. We are fortunate to have spacious classrooms and learning spaces. Our early years classes have a significant inquiry focus, and there is a strong emphasis on outdoor learning throughout the elementary school.

“We are the only international school within the Erlangen region so we are really fortunate from that regard. Many German families choose our school with our focus on progressive pedagogy, problem-solving and critical thinking. Our highly developed technology systems have enabled learning to continue unabated during COVID-19. This has been advantageous as we had the systems in place to switch to online learning quickly and we have had some parents move their children to us because of this reason. I also believe that our progressive pedagogical approach aligns with parents whose companies require similar skill-sets, and view this as beneficial and relevant for their children.

“We’ve had a number of students from Japan and India who have gone back to their home countries because of jobs. Siemens and Adidas families traditionally provide many of our students. With hiring freezes and reduced hiring of expats for a significant period of time, it is likely our demographic will change. We’ve never had to aggressively market our school because we’ve always had constant growth, but we are looking at how to attract more local German families in addition to the international sector.

“Quality schools are so much more than the facilities, it’s about the calibre of teachers you can attract. If teachers want to come to our school, it’s not because of the high salaries, it’s how the school can help develop them as teachers. There is still a strong interest in teachers to work overseas, but probably not to the extent that they used to due to the uncertainty of movement now as a result of COVID-19. However, we are still attracting highly motivated and skilled teachers to our school. We have very low turnover compared to the international average. When teachers decide to come here, many of them stay for a very long time. We have many teachers who have been here for 15 to 20 years. They’ve bought houses here, have financial security, the health system is well developed, and they grow as teachers, all of that is highly appealing.”



FRANCONIAN INTERNATIONAL SCHOOL

SUMMARY

The international schools market is never static. As demand for international school education grows, as legislation and other factors impacting accessibility adapt, and as socio-economics fluctuate, so enrolment shifts between price points.

Certain teaching and learning requirements remain consistent across all price points, requiring international schools to be as focused on education standards as they are on business development in order to deliver a successful model, however desirable the market.

Detailed data, trends and intelligence about the international schools market, including mid-market fee schools, are available through a range of products and services to support the needs of schools and all types of organisations supporting international schools from ISC Research.

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The background image shows three students in a library setting. A young woman with dark hair is in the foreground, looking down at a tablet. Behind her, another student is also looking at a tablet. To the left, a third student is looking at a tablet. They are all wearing school uniforms. The library shelves are visible in the background.

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