



Inspiring Futures Education

Agent Survey – Market Outlook and
Online Programmes

Key Findings

September 2020



Background

The survey was conducted during the last week in August. Approximately 60 agents responded from 22 countries

Agent Survey – Respondents by Primary Recruitment Market

| Agent's Primary Recruitment Market | No. of Responses | Agent's Primary Recruitment Market | No. of Responses |
|------------------------------------|------------------|------------------------------------|------------------|
| Albania | 1 | Mexico | 1 |
| Angola | 1 | Nigeria | 2 |
| China | 13 | Russia | 9 |
| France | 2 | Switzerland | 1 |
| Germany | 2 | Taiwan | 2 |
| Hong Kong | 2 | Thailand | 1 |
| Indonesia | 1 | Turkey | 1 |
| Italy | 3 | UAE | 1 |
| Japan | 4 | Ukraine | 3 |
| Kazakhstan | 3 | Vietnam | 1 |
| Latvia | 2 | Worldwide | 1 |

Background

The survey focused on the market outlook and the appetite for online programmes, in light of the ongoing pandemic

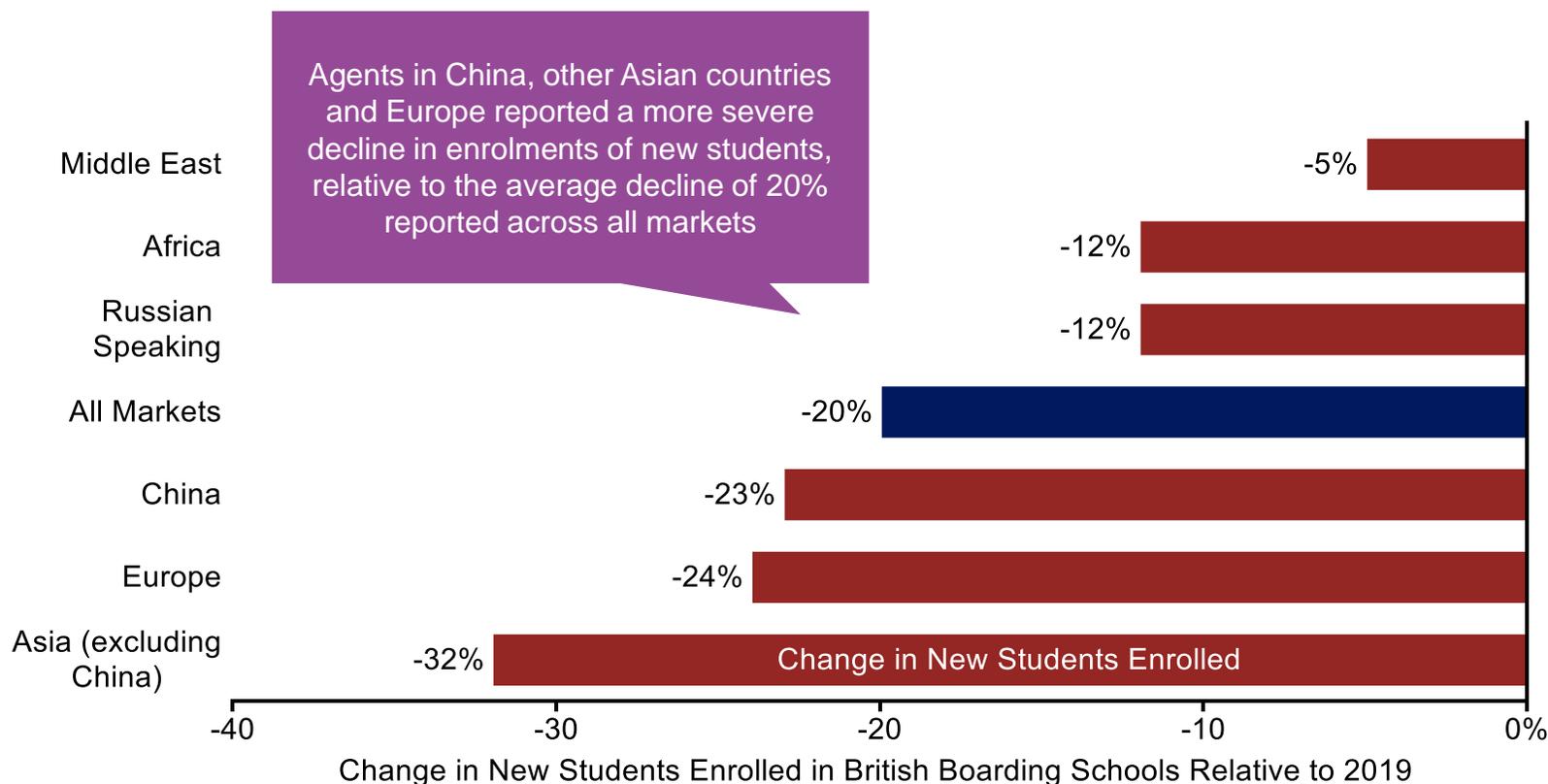
Agent Survey – Key Questions

| Section | Questions |
|--|---|
| Introduction | Q1. Which agency do you represent? |
| | Q2. What is the primary recruitment country for your agency? |
| Outlook for International Student Enrolments in British Boarding Schools | Q3. Compared to September 2019, what is the percentage change in the number of new students who will be enrolling at British boarding schools for the 2020/21 academic year (commencing September 2020)? <i>Please base your response either on your agency's experience or your understanding of the wider market in the primary recruitment country for your agency</i> |
| | Q4. For those students who have decided not to enrol at a British boarding school this September, which of the following statements are most true? <ul style="list-style-type: none"> a) Planning to defer entry to a British boarding school to January 2021 b) Planning to defer entry to a British boarding school to September 2021 c) Planning to continue their education in home country, with no plans to study in the UK d) Planning to enrol on an online programme with a British boarding school for some or all of the 2020/21 academic year |
| Demand for Online Programmes | Q5. Could you please indicate to what extent you may have clients interested in the proposed online programmes at Bishopstrow College and Padworth College. Please rate on a scale of 1-5, where 1=Not at all Interested and 5=Very Interested |
| | Q6. Do you have any other perspectives to share in relation to the attractiveness, or otherwise, of the proposed online programmes at Bishopstrow and Padworth? |

Market Outlook

Overall, agents reported a **20% decline** in the number of new students enrolling at British boarding schools in **September 2020** relative to last year

Q. Compared to September 2019, what is the percentage change in the number of new students who will be enrolling at British boarding schools for the 2020/21 academic year (commencing September 2020)?



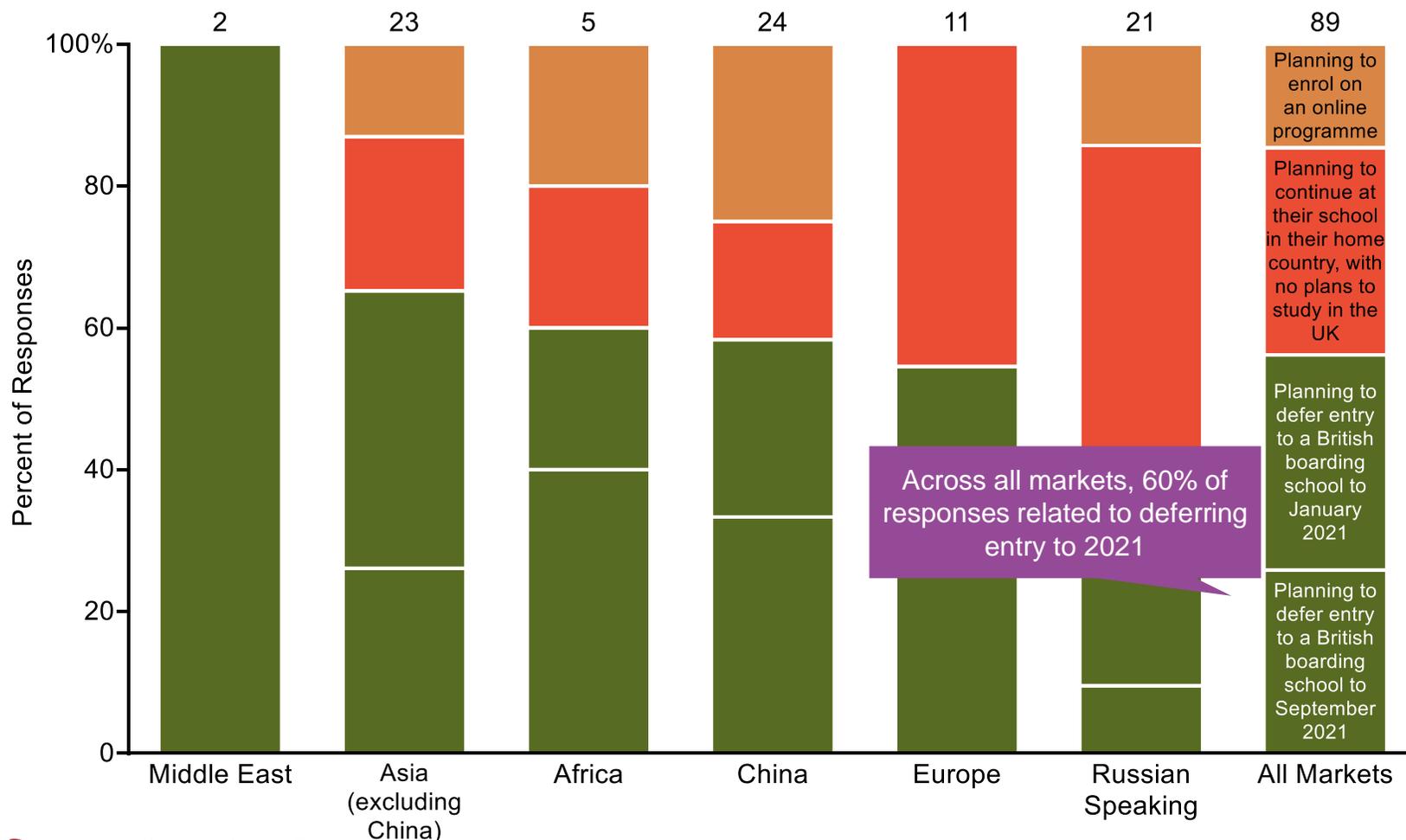
* 3 agents responded: N/A – no students placed in September 2019 or September 2020

Source: Agent Survey

Market Outlook

As a result of Covid-19, agents reported that clients will defer entry to January 2021 or September 2021, continue their education at home or enrol online

Q. For those students who have decided not to enrol at a British boarding school this September, which of the following statements are true?



Market Outlook

Despite the UK's handling of Covid-19, there continues to be confidence in the British boarding schools sector

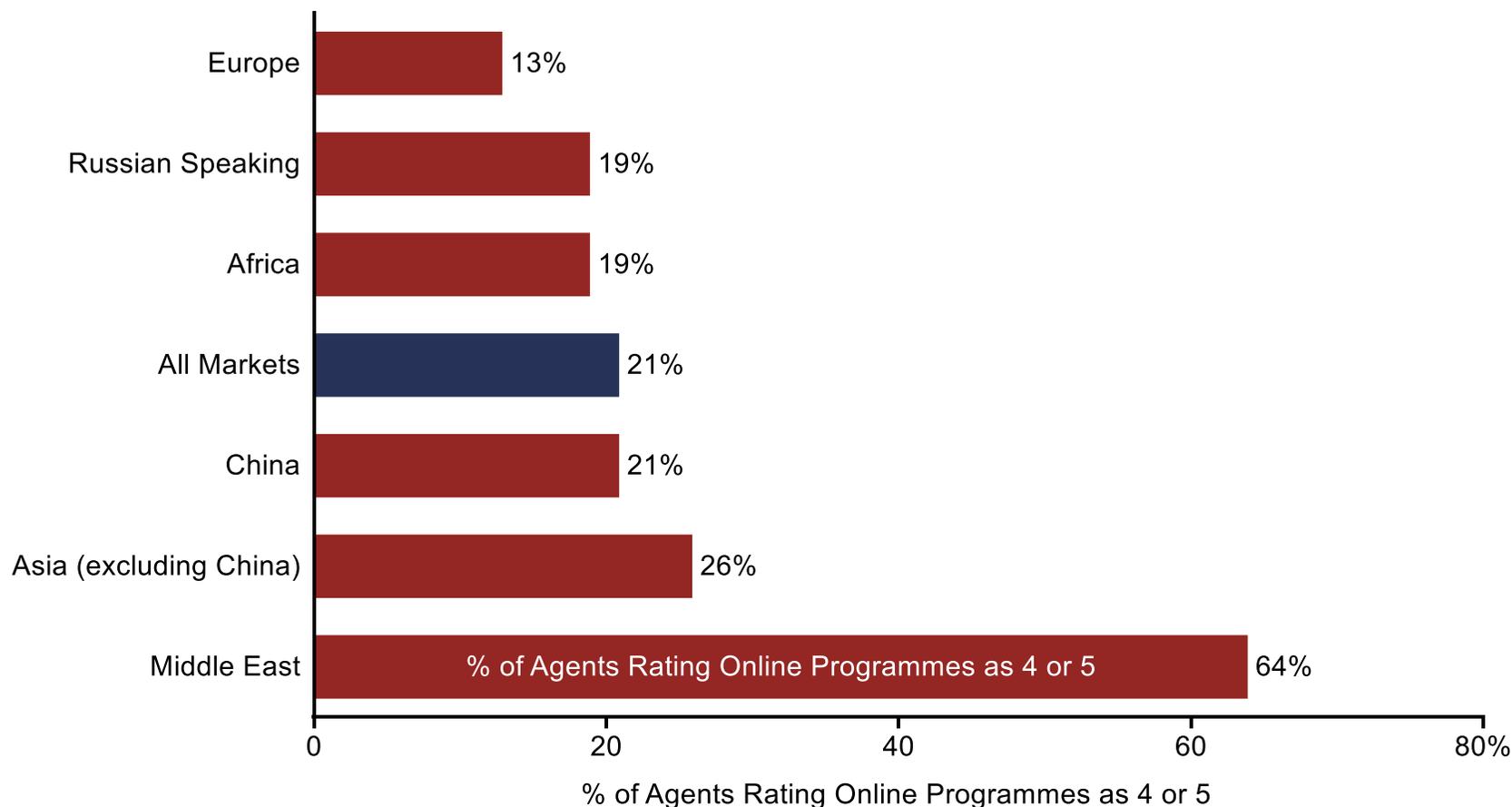
Q. For those students who have decided not to enrol at a British boarding school this September, which of the following statements are true?

| Response | Comments |
|--|---|
| Planning to enrol on an online programme with a British boarding school for some or all of the 2020/21 academic year | <ul style="list-style-type: none"> “Returning pupils who are reluctant to return [to the UK] are normally keen to take online courses” – Chinese Agent |
| Planning to continue at their school in their home country, with no plans to study in the UK | <ul style="list-style-type: none"> “Local international schools in Moscow and St Petersburg offer an alternative to online” – Russian Agent “Schools in other European countries that offer A Levels or the IB are being considered” – Latvian Agent |
| Planning to defer entry to a British boarding school to January 2021 | <ul style="list-style-type: none"> “My clients are considering enrolling in October 2020 (during the Autumn Term) or in January 2021” – Nigerian Agent |
| Planning to defer entry to a British boarding school to September 2021 | <ul style="list-style-type: none"> “Except for a small number, parents are very hesitant at the moment and most prefer to hold on” – Chinese Agent “In the long-run, prospects are still positive” – Chinese Agent “Families are waiting to see if there are further spikes [in Covid-19] in the UK” – Hong Kong Agent “Those that got offers/places for 2020 entry have chosen to come, but those looking to enrol in the next year or so are understandably hesitant” – Russian Agent |

Demand for Online Programmes

Overall, about 20% of agents rated online programmes highly (rating of 4 or 5, where 5=clients very interested)

Q. Could you please indicate to what extent you may have clients interested in Bishopstrow's and Padworth's online programmes. Please rate on a scale of 1-5, where 1=not at all interested and 5=very interested



Demand for Online Programmes

Agents shared a number of observations relating to the proposed online programmes

Q. Do you have any other perspectives to share in relation to the attractiveness, or otherwise, of the proposed online programmes at Bishopstrow and Padworth?

Academic Standing of Online Provider an Important Consideration

- *“Proof of good I/GCSE and A Level results and ranking”*
 - Hong Kong Agent
- *“The tutor’s educational background and teaching experience might increase the attractiveness of Bishopstrow’s [online] courses”*
 - Chinese Agent

Some Sensitivity on Fees

- *“Fees need to be adjusted as the market is competitive”*
 - Nigerian Agent
- *“Scholarships always help”*
 - Russian Agent
- *“Fees are too high for A Levels, but OK for a 1 year [foundation] programmes”*
 - Nigerian Agent
- *“In comparison to the fee levels for attending the college [Bishopstrow] physically, online is much too expensive”*
 - Chinese Agent

Motivation of Students Studying Online a Key Factor

- *“Online programmes will be successful when several pre-requisites are met: (1) The engagement level of all students has to be high enough to allow for efficient working; and (2) The contact between students and teachers has to be consistent and effective”*
 - Kazak Agent

Demand for Online Programmes

Understandably, a number of shortcomings of online programmes were highlighted. There was also interest in a limited online experience

Q. Do you have any other perspectives to share in relation to the attractiveness, or otherwise, of the proposed online programmes at Bishopstrow and Padworth?

Online Cannot Replace the Immersive Nature of Traditional Courses ...

- *“An English preparation programme is difficult to promote as the market expects this to be a face-to-face experience”*
 - Indonesian Agent
- *“I am not sure any of my clients will be interested in online tuition from Bishopstrow”*
 - Kazakh Agent
- *“Online courses are not really of interest to German clientele, who want the true experience of a stint abroad”*
 - German Agent
- *“Our students are really looking for face-to-face tuition”*
 - Latvian Agent
- *“Taiwanese parents want their children to have an immersive experience”*
 - Taiwanese Agent
- *“Clients want the immersive experience for their children”*
 - French agent

... But Some Interest for More Limited Online Experience

- *“We could have students interested in taking one subject at A Level in one year for students to present as part of their university application”*
 - Italian Agent
- *“I think my clients might be interested in English tuition online for 1-2 hours per week, but they would not have time to participate in a more involved course during the school year”*
 - French Agent
- *“Italian students will not have time to attend online courses as well as school”*
 - Italian Agent