



Online abroad

Digital learning for international schools is taking off in emerging markets as competition rises, says **Diane Glass**, commercial director, ISC Research



The success of international schools is, in large part, down to their reputation for quality teaching and learning. Their need to remain competitive; against their neighbouring state schools, the growing number of other local international schools, and independent boarding schools abroad, means they have to keep their learning provision and facilities as good as it can get.

Education technology is proving increasingly popular as a way to differentiate; enabling schools to use demonstrably progressive resources to support students of all ages with their learning.

Research conducted throughout 2017 by the ISC Research International Education Research Panel (IERP), suggests that although already well adopted by some international schools, more digital learning resources are in demand.

Two studies, in January and July, questioned international schools about their use, needs and buying habits of education technology. 9.7% of all K12 English-medium international schools participated in the study of education technology. This included a minimum of 8% of international schools from each region of the world and a cross-section of schools offering both primary and secondary learning.

Results highlight the subjects and learning areas where digital resources are in particular need, and the type of content in most demand.

Digital learning in the classroom

34% of schools said their pupils use tablets to access digital learning resources but there's still more preference towards desktop and laptop PCs.

Less than half of the international schools that responded to the research (41%) said they currently use digital resources to support personal learning. However, well over half of the schools (59%) said they feel digital resources supporting personalised learning could help them raise their standards.

Free resources were popular among teachers for their lesson planning; only 34% of schools indicated paying for content for this purpose. Schools said they prefer to invest in practice and revision content, in summative assessment, and in simulations and animations to support learning.

Schools believe there is a distinct lack of good quality resources sufficiently intuitive for busy teachers to use or incorporate into children's learning. This is particularly notable for science and English subject learning resources; both of which are in high demand.

Many international schools (77%) are using digital content and applications as teacher-led tools; predominantly via interactive whiteboards and projectors. Almost 60% of schools surveyed said they would definitely or probably be purchasing new digital content or applications this year.

Internet accessibility remains a challenge for some international schools. For example, 19% said they still do not have suitable internet links, and more than 30% have concerns regarding their internet provision. The regions where internet access is most challenging are South East Asia, where only 65% of schools have the access they need and Africa, where 67% are with suitable internet.

However, the lack of internet is not the biggest challenge ►



\$43 billion
the total fee income
from K12 medium
international schools



► limiting new or expanded use of digital content among international schools. According to the IERP research, it is the lack of time to integrate solutions into lessons combined with a lack of suitable staff training that are the biggest problems. 33% of international schools said they receive insufficient training from suppliers to optimise their use of digital content and resources.

This suggests there are excellent opportunities for ed tech suppliers and service providers willing to commit to supporting the needs of international schools.

Regional approaches to ed tech

The IERP study identified some notable regional practices. International schools in the Middle East are more likely to pay or subscribe to digital resources to lesson planning than any other country, as indicated by 68% of schools in the Middle East that participated in the survey. In comparison, schools in the Americas, Africa and Europe are much less likely to invest in this area.

For lesson delivery, the region investing the most on digital resources is East Asia, according to 64% of the schools surveyed. Along with the Middle East, it's also the region most willing to invest in digital resources for student learning practice and revision. When it comes to demand, schools in East Asia and South-East Asia are eager to engage with suppliers of resources to support lesson delivery and 80% and 70% of schools respectively indicated this desire. Suppliers of cross-curricular subject learning resources might wish to strategically target the international schools in Eastern Asia and Europe where these resources are in most demand.

Our research found that 77% of schools in Eastern Asia are more likely to be purchasing new digital content or applications this year than schools in other regions, but in all regions except Oceania, the likelihood of investment was just over 50%.

Purchasing behaviour

In separate research about purchasing plans and practices conducted in July, IERP identified a number of areas where investment by international schools is likely to take place this year.

89% of international schools researched said they set an annual budget for classroom ICT and 66% set a separate budget for digital content and printed resources. 34% of respondents said they will definitely be making significant investments in ed tech this year, and another 34% said they probably will do so; most likely in resources supporting personalised learning and the training of teachers in their use of ed tech. The research indicates that ICT, procurement or business managers play a significant role in selecting and



purchasing digital content at international schools.

Developing a trusted relationship with suppliers is considered a priority by international schools. 63% of all the schools surveyed said that managing a relationship with a trusted supplier is more important than lowest price or rapid delivery.

It's a market worth exploring. The total annual fee income generated by the K12 English medium international schools market has increased by 45% over the last five years to \$43 billion (£32 billion). ISC Research forecasts that by 2027, the market will have reached

16,600 schools teaching over 10 million students and generating a total fee income of \$82 billion. It's an appealing one for ed tech suppliers prepared to respond to the specific needs of these schools.

Follett is one of these. "We are seeing an increasing number of international schools looking for ed tech solutions," says Dylan Jones, Follett's senior international strategy consultant. "Solutions for a range of needs: to inspire student learning, make lessons more engaging, and to streamline curriculum planning, internal systems and approaches to assessment."

Furthermore, Christopher Bradford, head of BrainPOP in the UK, adds that there are a huge number of forward-thinking international school teachers and leaders who are looking for creative ways to deliver engaging learning and are welcoming the very latest in ed tech provision. "International schools have great budget autonomy and decision freedom, they are actively interested in quality education supplies, it's a rapidly expanding market that has given us a chance to diversify," he says. ■

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10 million
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