

LEADING COUNTRIES IN SOUTH-EASTERN ASIA FOR ENGLISH-MEDIUM K-12 INTERNATIONAL SCHOOLS

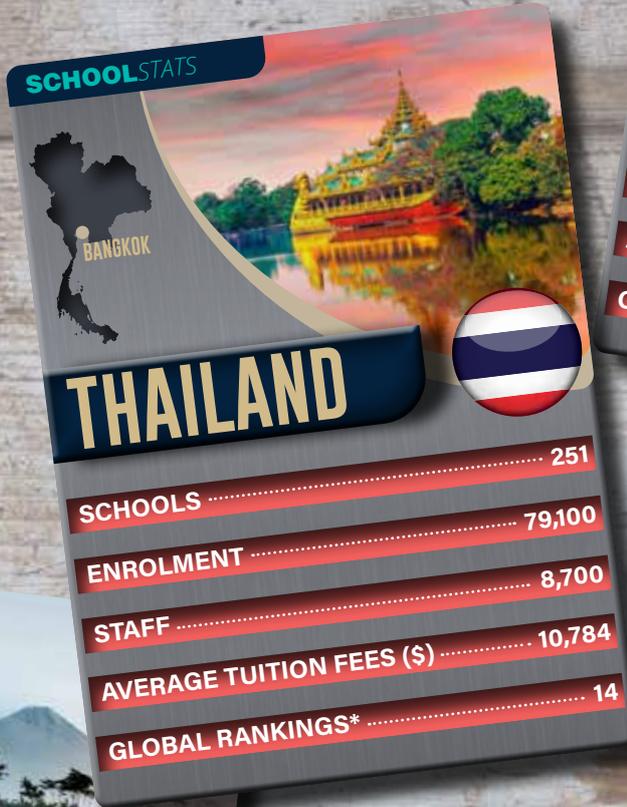
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DATA:

ISC Research

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FEES ARE IN USD.



*POSITION IN GLOBAL RANKINGS BY NUMBER OF INTERNATIONAL SCHOOLS

OUR GRATEFUL THANKS TO ISC RESEARCH FOR THIS DATA.

SOUTH EASTERN ASIA:

*More international schools,
more diversity.*

Will Bedford

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South-Eastern Asia is now one of the leading subregions in the world for international education. According to ISC Research data from January 2020, which takes into consideration new school openings and school enrolments for the current academic year, the subregion has 1,516 English-medium international schools with over half a million (557,000) students currently enrolled. This makes South-Eastern Asia the third largest subregion in the world for the number of international schools (behind Western Asia and Eastern Asia), and the fourth largest subregion in the world for the number of students attending the schools.

ENROLMENT DIVERSITY

In several countries within the subregion, the local population is seeking out international schooling more than ever before; Indonesia, Malaysia, Thailand, Vietnam and Cambodia particularly so. In all of these countries, local children have become a significant demographic, and demand from local families continues to rise as economies improve. This can be an admissions challenge for international schools that could fill all of their available places with local children. A healthy demographic mix is, nevertheless, vital for a good international school; in both its student population and its teachers, and strategic admissions and recruitment is a priority for many international school leaders today.

When it comes to demand for school places from expatriate families, an increasingly broad demographic is emerging, many now originating from elsewhere in Asia. Market analysis from ISC Research shows that international schools in the global cities of Singapore, Bangkok and Kuala Lumpur are experiencing growing demand from Chinese, Japanese and South Korean families seeking the international schooling that is less restrictive, or more readily accessible than in their home countries. This is prompting some families to relocate in search of the education they want for their children. There has also been notable movement, in recent months, of families from Hong Kong due to challenges within the country.

A growing expatriate demographic throughout South-Eastern Asia is the Southern Asian professional who is increasingly being hired by multinationals based in South-Eastern Asia in preference to very costly Western expatriates. As a result, Indian children are an emerging demographic in many international schools. For example, Indian children are the leading student nationality in Singapore's international schools making up 12.4% of all



students. For the Western expatriates who are being hired today, fewer receive the generous relocation packages that, 20 years ago, enticed them overseas. Some are offered a contribution towards international school fees for their dependants, but others receive no benefit at all resulting in more cost-conscious school selection.

This broadening demographic, away from the traditional Western expatriate model, is driving a demand for a wider variety of international schools, including those with fees that are more manageable within a parents salary. As a result, a new sector of mid-priced international schools has emerged in recent years.

EMERGING SCHOOL TYPES

The different models of international school vary in their demographic of students, staff and facilities, all of which are impacted to a significant extent by the school's fee levels. An example of the nationality differences in these two school types can be seen from the data for Thailand. According to analysis conducted in November 2019 by ISC Research for its Market Intelligence Report of international schools in Thailand, 49.9% of the 34,000 children currently enrolled in the country's 76 premium international schools (those schools charging the highest school fees, which are more likely to be accredited and a member of at least one well-regarded school association) are Thai. 5.3% of the students are American, 4.9% are British, 2.6% are Japanese, 2.1% are Chinese, 1% are South Korean and 0.9% are Indian. Russian, Singaporean and Australian children are also within the top ten nationalities at Thailand's premium international schools. At the mid-market priced international schools in Thailand, at which 21,000 children are currently enrolled, the demographics are similar, but the percentages differ; 41.5% of the students are Thai, 5.1% are South Korean, and 3.9% are Chinese.

American, Japanese, Indian and British students are all within the top ten nationalities at these schools along with Taiwanese, British, Russian and French children.

The demographics of teachers varies between the different international school types too. The ISC Research Market Intelligence Report of international schools in Malaysia identifies the most predominant nationality of teachers at Malaysia's premium international schools as British (42.6%), 24.1% are Malaysian, 13.9% are from North America and 9.1% are from Australia or New Zealand. In the mid-priced schools, over half of all teachers are Malaysian (54.7%) with 26% UK teachers and the rest coming from a range of other countries. The higher fees of the premium international schools reflect the higher cost of recruiting the best teachers. They typically pay higher salaries and offer competitive remuneration packages. A blend of staff demographics is just as important for a good international school as the blend of students; this includes local teachers who bring a cultural understanding that is increasingly recognised as vital for any good international school.

INFORMING THE MARKET

ISC Research continues to work closely with many ECIS member schools, as well as many other international schools around the world to collect data and understand market changes. As the international schools market becomes increasingly competitive, so knowing emerging demographics, changing demands, and market trends are essential for school admissions strategy, staffing and recruitment planning including setting salaries and benefits, growth planning, and new campus investment. Data, intelligence and different reports, specifically prepared to inform all stages of school development are available from ISC Research at www.iscresearch.com

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