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Spanning the Globe: Doing K-12 Business in the U.S. and Abroad

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• “10 Mistakes to Avoid When Going Global” (EdWeek Market Brief)
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Spanning the Globe

Doing K-12 Business in the U.S. and Abroad
Welcome to EdWeek Market Brief

PK-12 Insights for Business & School Leaders

- What District and School Leaders Really Want From Personalized Learning
- ‘Next Gen’ Science Standards Promoting Content Providers to Adjust

Online Testing in Georgia Disrupted by Glitches

Bridging the Information Divide Between Companies and Schools is a Struggle

‘A Threat and an Opportunity’ for Testing Companies

ACT Adds ‘Open’ Education Provider to Its Portfolio
Growth in the U.S. Ed-Tech Marketplace

K-12 Digital Instructional Materials Market

50% growth projected

An increase of $1.1 billion from 2015-2020

-- Bill Gates

Source: GSV
In 2011, the U.S. spent $11,841 per full-time-equivalent (FTE) student on elementary and secondary education—35% more than the OECD average of $8,789. Source: IES: National Center for Education Statistics
Purchasing Trends in the U.S.

- $128 billion per year is purchased in K-12
- $49 billion of that amount is spent without going through the formal RFP process.
- $79 billion of goods and services are purchased via a request for information, request for proposal, or similar procurement avenue.

Source: Noodle Markets, drawn from the National Education Association’s 2013-14 research (Rankings of the States 2013 and Estimates of School Statistics 2014), and data from Education Intelligence, Inc.
Opportunities in the U.S. Market
What School Leaders Want From Personalized Learning
K-12 officials want "personalized" technologies that act as communication tools, not just models for tailoring academic lessons.
Where Demand for ELL Digital Content is Highest

Percent of school and district leaders who say their districts plan to purchase digital content for English learners in the next year.

BY DISTRICT LOCALE

BY DISTRICT SIZE

SOURCE: Education Week Research Center survey of more than 400 school and district leaders who are registered users of edweek.org.
What Works Best for Professional Development?

Teacher Professional Development: In-Service Days Still Dominate

In-service days, which are often required by districts, are by far the most common form of PD teachers receive. Workshops and conferences are less prevalent -- but are relatively popular among educators.

![Chart showing satisfaction and participation for in-service days, workshops, conference attendance, professional learning communities, professional lectures, online courses, in-person courses, webinars, and mentorships.]

Satisfaction (Extremely/Very...): 76%
Participation (Past 12 Months): 14%

SOURCE: 2015 Grunwald Associates LLC
Threats in the U.S. Market
Data Privacy Expectations

**District Leaders Adding Demands to Contracts**

In the next year, how likely is your district to add student data privacy protections to educational technology contracts?

[Pie chart showing likelihood of adding data privacy protections in contracts.]

- **Likely**: 46%
- **Unlikely**: 46%
- **This provision is already part of our contracts**: 8%

**Source:** Superintendents’ survey, AASA, the School Superintendents Association, & EdWeek Market Brief, September 2015
## Dissatisfaction With Current Offerings

"We are dissatisfied with commercial providers' offerings."

<table>
<thead>
<tr>
<th>Category</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Somewhat Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>8%</td>
<td>42%</td>
<td>41%</td>
<td>8%</td>
</tr>
<tr>
<td>Special Populations and Equity-focus</td>
<td>7%</td>
<td>52%</td>
<td>35%</td>
<td>6%</td>
</tr>
<tr>
<td>Specific Subject and General</td>
<td>11%</td>
<td>43%</td>
<td>35%</td>
<td>11%</td>
</tr>
<tr>
<td>Deputy/Assistant Superintendent and 500</td>
<td>8%</td>
<td>41%</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>District Superintendent</td>
<td>51%</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Percentages may not add up to 100 due to rounding.

SOURCE: A proprietary November 2015 Education Week Marketing survey of approximately 500 district leaders who are registered users of Edweek.org.
Integrating Open Educational Resources

District Leaders’ Perceptions on Open Content

Open Educational Resources (OER) are instructional materials that can be legally and freely copied, used, adapted, or re-shared. Please rate your level of agreement with the following statements about your expectations regarding your district’s use of these resources over the next two years.

- "It is easier to adapt or repurpose OER to fit our needs.
- "We want to save money.
- "OER are popular with teachers.
- "We are dissatisfied with commercial providers' offerings.

![Pie chart showing District Leaders' Perceptions on Open Content]

- Strongly Agree: 52%
- Somewhat Agree: 21%
- Somewhat Disagree: 13%
- Strongly Disagree: 5%
ESSA:

The Every Student Succeeds Act
Changes on the Horizon With New K-12 Law

President Barack Obama, flanked by Senate Health, Education, Labor and Pension Committee Chairman Sen. Lamar Alexander, R-Tenn., left, and the committee's ranking member Sen. Patty Murray, D-Wash., signs the Every Student Succeeds Act last December.

Image credit: Evan Vucci-AP-File
Tracking International Trends
Globally, More Devices Than Ever Before

The global classroom technology market value for hardware grew 7% YoY reaching $15.2 billion by the end of 2015.

The largest and fastest growing segment was the Personal PC category. The interactive display market was flat, but within that interactive flat panels growth was 88%, accounting for almost a third of the total category value.
Coverage Beyond the U.S. Market

10 Mistakes to Avoid When Going Global

Cultural differences, exchange rates, pricing, and reseller relationships are all key factors to understand.

Kevin Bushweller
Executive Editor

Are you thinking seriously about expanding your education business outside the United States? Or are you in the process of doing so?
Thank You
THE INTERNATIONAL K-12 SCHOOLS MARKET
Market development and opportunities
• What is The International School Consultancy?
• When does ISC include an international school in its data?
• How is the market growing?
• Where in the world are the schools today?
• What are the opportunities for education suppliers?
• Where are the growth hotspots
• Where are the new trends around the world?
• What does the future look like for the market?
ISC CRITERIA

For the purposes of market intelligence, data collection and analysis, ISC includes an international school if:

ENGLISH-MEDIUM

The school delivers a curriculum to any combination of pre-school, primary or secondary students, wholly or partly in the English language outside an English-speaking country.

ENGLISH-MEDIUM EDUCATION

The school is in a country where English is one of the official languages, offers an English-medium curriculum other than the country’s national curriculum and is international in its orientation.

Data used in this presentation is accurate as at 15th February 2016.
# Global English-Medium Education Market

<table>
<thead>
<tr>
<th>Category</th>
<th>2000</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Schools</strong></td>
<td>2,584</td>
<td>8,231</td>
</tr>
<tr>
<td><strong>Students</strong></td>
<td>&lt;1m</td>
<td>4.37m</td>
</tr>
<tr>
<td><strong>Staff</strong></td>
<td>90,000</td>
<td>402,000</td>
</tr>
<tr>
<td><strong>Fee Income</strong></td>
<td>$4.9b</td>
<td>$39b</td>
</tr>
</tbody>
</table>

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WHAT’S DRIVING GROWTH?

- Increasing population and income
- Mobility of labour
- Increasing recognition of the benefits of quality education
- English - the language of learning and business
Continued growth of expatriate families

Enrolment now dominated by children of richest 5% of non-English-speaking local families

English-medium education

Western-style of learning preparing students well for Western universities

Globally-recognised qualifications

 Reliable route to the world’s top universities
LEARNING APPROACHES

• UK and US orientation still predominate

• International curricula increasingly popular choice, and incorporating local culture into the curriculum

• Increase of bilingual programmes

• High quality approaches to learning and teaching

• More focus on personalised learning, data-driven assessment and inclusion

• Demand for learning-focused resources (big growth in edtech)
QUALITY
STANDARDS

- Competitive marketplace
- Importance of inspections and accreditation
- International school associations
- Government requirements
A HEALTHY MARKET

- Highly profitable market
- 238 countries/territories
- Multinational school groups moving from strength to strength
- Growth of independent school brands with international operations
- Many brand new schools in planning or construction phases
- Many existing schools expanding to meet demand
SCHOOLS BY REGION

- Asia: 4,433
- Europe: 1,742
- Americas: 1,123
- Africa: 784
- Oceania: 149
SCHOOLS BY SUB-REGION

Top 10 sub-regions by count of international schools (of 22).
SCHOOLS BY COUNTRY

Top 10 countries by count of schools.

- UAE: 548
- China: 545
- Pakistan: 440
- India: 401
- Spain: 349
- Japan: 239
- Saudi Arabia: 238
- Indonesia: 192
- Egypt: 191
- Brazil: 185
Top 10 cities by count of schools

1. Dubai: 254 schools
2. Madrid: 181 schools
3. Abu Dhabi: 145 schools
4. Doha: 134 schools
5. Karachi: 121 schools
6. Beijing: 121 schools
7. Buenos Aires: 119 schools
8. Shanghai: 116 schools
9. Bangkok: 110 schools
10. Tokyo: 106 schools
CURRICULUM TRENDS

Number of schools offering the major international curricula.
EXAMINATION TRENDS

Growth trends
January 2012 – January 2016
GLOBAL GROWTH TO SEPTEMBER 2015

Sept 2014: 9% increase in 633 new campuses

Sept 2015
International schools added in 12 months to September 2015 by region.

GROWTH BY REGION

Asia, 318
Americas, 187
Africa, 81
Europe, 40
Oceania, 5
International schools added in 12 months to September 2015 by sub-region.
GLOBAL FORECAST

Number of international schools to 2026
(2016 data from 1st January)

2000: 2,584
2016: 8,178
2021: 11,408
2026: 16,154
International school student enrolment to 2026 (millions) (2016 data from 1st January)
GLOBAL FORECAST

International School fee income (USD billions)
(2016 data from 1st January)
## Forecast Summary

<table>
<thead>
<tr>
<th>Increase</th>
<th>Schools</th>
<th>Students</th>
<th>Staff</th>
<th>Fee Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over 5 years</td>
<td>3,230</td>
<td>1,836,779</td>
<td>160,012</td>
<td>$21.2 billion</td>
</tr>
<tr>
<td>Over 10 years</td>
<td>7,976</td>
<td>4,589,841</td>
<td>396,572</td>
<td>$50.4 billion</td>
</tr>
</tbody>
</table>
OUTLOOK FOR THE INTERNATIONAL SCHOOLS MARKET

- Continuing economic and population growth
- Increasing affluence and affordability of international education
- Continuing movement of labour
- Increasing prevalence of English as the language of learning and business
- Increasing number of students aiming for high quality English-medium university education
- Competition for the best students, teachers, school leaders and administrators
DEMAND FOR HIGH QUALITY LEARNING RESOURCES

• Financially healthy and competitive market

• Schools aiming to be leading-edge and innovative

• Increasing need for high quality education resources and services

• Increasing importance of quality benchmarking, accreditation, PD and assessment

• Quality supply chain needed to maintain and raise standards
Diane Glass : Director for Business and Higher Education

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Doing K-12 Business in the U.S. and Abroad

Required Reading from *Education Week*:

**Inside ESSA: The New Federal K-12 Law**
This essential guide to ESSA gathers the best of *Education Week* reporting to get at the heart of a law set to reshape our education system and the people it serves for many years to come.

[Read Now.](#)