



The 2022 Boarding Schools' Association / Connexcel **Survey of Chinese Parents**

Contents

📍 Foreword	P.02
📍 Schools' feedback on 2021 survey	P.06
📍 Executive Summary	P.08
📍 Introduction	P.11
📍 The composition of the survey group	P.13
📍 Chinese overseas entry to UK boarding schools	P.15
📍 The attraction of studying abroad	P.19
📍 Choosing an overseas school	P.26
📍 Factors which may influence parents' decision making	P.44
📍 Confidence in the UK boarding sector	P.53
📍 Improvement of the study experience	P.58
📍 The importance of guardianship	P.61
📍 The level of income earned by parents who responded to the survey	P.67
📍 Conclusion and recommendations	P.70



Robin Fletcher, MBA, MPhil, FRSA, MTIOB
CEO, Boarding Schools' Association and BSA Group

UK boarding schools differ in shape, size, history, heritage, type and location. But they all combine to represent the very best in educational excellence for young people.

With excellence comes confidence. That's why this year's survey of 1,100 Chinese parents is so important, because it demonstrates beyond doubt the confidence Chinese parents have in British boarding.

The survey shows they recognise outstanding teaching and learning within a global-facing curriculum and it shows that UK boarding schools are a strong bridge for accessing top-ranking universities. Most importantly it shows that parents think British boarding schools are safe, good at pastoral care, support their local communities and have a well-earned reputation for being agile when it counts.

This survey has great value for schools, parents, educational agents and anyone with an interest in boarding in the UK. It provides important data to back-up anecdotal opinion and the Boarding Schools' Association and BAISIS are delighted to be partners in its publication once again.

Whatever role you play in supporting boarding in the UK, we hope you find it a useful report.



Caroline Nixon M.A. (Oxon.), M. Ed., FTIOB
International & Membership Director, Boarding Schools' Association
Director, British Association of Independent Schools with International Students

Once again, I am delighted to have been involved in the creation of this report. To now be able to compare its findings to those of last year's report makes it even more valuable. It is pleasing too to see that the number of respondents has increased and we have been able this year to collate the opinions of 23% of all mainland Chinese families with children currently at school in the UK.

Overall their responses are extremely positive and the problems experienced by those children and their families as a result of the pandemic have done very little to dent their enthusiasm for British education. The many benefits of boarding education in the UK, ranging from portable qualifications which open the door to entry into top universities in any country in the world, to excellent pastoral provision, to networking opportunities, to increased confidence and independence, still exist.

We know from the feedback we received after last year's survey that schools found it useful and some of that feedback has been included in this report. We hope that boarding schools will use the results of this year's survey to inform their marketing and recruitment activities and also to increase the quality of provision for their existing and future Chinese and other international pupils. There are clear messages in the parental responses and we have pulled out some questions to consider at the end of each section of the survey to aid schools in these objectives.

I do hope that the survey and its conclusions will prove helpful to schools, agents, guardians and families who work together for the success and happiness of all pupils of every nationality.



John Zhang M.A.
Co-Founder, Connexcel Ltd

Connexcel is delighted to have partnered with the Boarding Schools' Association and BAISS in conducting this extensive survey of Chinese families currently sending their children to UK boarding schools, or considering doing so in the near future.

The challenges faced by families during the COVID 19 pandemic, remain vividly in our minds as we return to normal in the UK and seek stable international arrangements going forward. Last year's survey suggested that UK boarding schools largely satisfied, and in many cases exceeded parental expectations, whilst prospective parents remained somewhat uncertain. That position is changing dramatically as confidence grows once more and the advantages of a great British boarding education are made possible.

The questions presented at the end of each section aim to helpfully stimulate further discussion, recognising that all schools must adapt and develop their offering. Schools committed to international education will recognise the issues raised and be working through them. They will already be looking carefully at effective recruitment strategies in partnership with qualified agents, recognising the importance of UK guardians, providing bespoke feedback and clarity towards possible university entrance. They will have devoted considerable resources to the safety and pastoral well-being of their students and be committed to clear communication with their non English speaking parents.

Many thanks to all who have taken the time to participate in this study; we anticipate there will be further refinements over the coming years, as we work closely with parents and BSA schools. Above all our aim is to enhance the special experience provided for all our boarding students as they enjoy their learning in our schools. We would like to extend our gratitude, in particular, to our esteemed colleague, Mr. Peter Wells, who has dedicated much time and effort to compiling this second report.



Schools' Feedback on 2021 Survey

Mark Lauder, Headmaster, Strathallan School

We take all feedback seriously, as a vital part of continually looking to improve and understand our relationships with pupils and parents and we actively seek this from all our parents – last year's BSA Report on the views of Chinese parents, in particular, was therefore very welcome and useful to us and we look forward to the next.

Chris Wheeler, Principal, Monkton School

This survey was really useful in understanding a part of our community we often hear less from. To learn, for example, that it is our pupils who most often drive the move to study in the UK is really valuable in how we prepare for their arrival and support them when they are here. We are looking forward to this year's survey too, recognising that data becomes most valuable in the context of time.

Henry Price, Headmaster, Oakham School

An invaluable insight into the views of Chinese families helping them find the right school and helping us/the right school support them.

Sarah Bellotti, Head, Mill Hill International

With a vibrant Chinese student population at our school, it is most important that we have up-to-date information about the sector. The insights from the BSA Report are invaluable in making sure we tailor our messaging to the Chinese market, helping us to remain sensitive to the needs of Chinese pupils and their parents.

Areti Bizior, Head , Luckley House School

We highly value the work that the BSA are doing, the information they provide is always enlightening and look forward to their next publication.

Irfan H Latif, Principal , DLD College London

Colleagues at DLD College London found the 2021 BSA report on the Chinese market very useful and are looking forward to the 2022 update to help inform their marketing and admissions strategy.

Executive Summary

Independent boarding schools in the UK have a strong ongoing relationship with Chinese families. This study, the second conducted by the Boarding Schools' Association, BAISIS and Connexcel, confirms increasingly high levels of satisfaction amongst current mainland Chinese parents, whilst underlining certain areas where schools might further improve their offering.

Perhaps surprisingly, given the difficulties posed by the COVID-19 pandemic, interest in British education does not appear to be diminishing and the attraction of UK boarding schools continues to grow. Last year over 880 families took part in our survey (roughly 15% of all Chinese families in UK boarding schools at that time), whilst this year that figure has risen to over 1,100. This report should give much confidence to parents considering sending their children to UK boarding schools.

A range of positive factors feed into this confidence:

- The consistently high standards of teaching and learning demonstrated by UK schools
- The well-rounded UK curriculum with an outward facing global emphasis
- Opportunities to attend the best universities in the UK, USA and elsewhere
- A sense that the UK is a safe and generally healthy environment in which to grow up
- Boarding schools in the UK are committed to outstanding pastoral care, linked to strong community values
- UK schools have a proven reputation for resilience and continuity, remaining agile, effective and flexible through difficult times
- Changes within the Chinese education system have encouraged comparison with UK provision.

Chinese parents will wish to reflect upon several important recommendations:

- Make sure you take advice from a BSA certified agent (CAP C & A)
- How well prepared is your child? Think carefully about the best year of entry and prepare well in advance. Prep school entry can provide one gateway to a greater range of schools
- How much linguistic support is the school able to give? Consider an induction or 'taster' course
- Gather information from different sources and visit schools if possible. Attend online events hosted by organisations
- Try to match your child's interests and abilities to the school, rather than simply opting for the well-known names or league table positions. All schools are different and have particular strengths and specialisms.

Several key areas emerge which UK schools should take note of:

- Recent changes to the Chinese domestic, private and international education systems are now affecting parental decisions to choose study abroad (over 34% will bring forward applications).
- Parents are looking for an education which promotes their child's individuality and independence. They also want a safe setting. Schools need to give clear information over how they will deal with emergencies and any health or travel related disruption. Flexibility is essential.
- Encourage fuller access and participation amongst parents and guardians in understanding the student's well-being, health and academic progress.
- Levels of communication, care and concern cannot be taken for granted. Well-trained and committed house staff are greatly valued.
- Parents continue to want better information on university options and procedures.
- Schools should listen carefully to 'the student voice' and respond imaginatively to feedback particularly from those leaving the system or moving up to progressing to universities or similar pathways.

- Make sure all staff are internationally minded and sensitive to any form of racial discrimination.
- Take greater account of cultural differences over food, festivals and fashion. Foster greater understanding of diversity within the student population.
- Consider working with other schools in providing specific services for international students, such as escorted travel, holiday courses and induction training.
- 80% of Chinese families make their application to UK boarding schools through an agent. Make sure agents are BSA certified.
- Schools need to work closely with one or more trusted agents. Keep agents up to date with school progress and any changes in emphasis. Invite agents to visit the school regularly.
- Make sure guardianship arrangements are of the highest standard, modelling best UK practice.
- UK schools will need to explore new online forms of marketing, if they wish to strengthen their message for a Chinese audience. Good website information is vital for Chinese parents.
- Schools need to engage sensitively with contrasting geographical regions and sectors of Chinese society. The admissions team needs good understanding of the international market.
- Students will apply from a range of socio-economic backgrounds. Not all will come from wealthy families. Some agents will be better at dealing with particular sectors of Chinese society.

Introduction

The 2021 BSA / Connexcel Boarding Schools Survey and Report aimed to give a snapshot of options amongst current and prospective Chinese parents with children boarding or about to start boarding in UK schools. It also included the views of those registered to begin their schooling in September 2022. Based upon a survey conducted during the COVID-19 pandemic, the report reflected the views of over 880 families, roughly 15% of the total number of Chinese students then being educated in UK boarding schools. It is fair to say that these students experienced some of the most extreme challenges posed by the pandemic with travel restrictions, distance learning and repeated health testing in schools. In many cases, they were not able to return home for their holidays and needed generous support from guardians and boarding house staff in the UK.

The 2022 survey report aims to see how the post pandemic picture is changing and whether interest in UK boarding schools will be sustained. Pleasingly, it has attracted even greater support this year with over 1,100 families responding to a questionnaire sent out in the 2022 summer term. It builds upon the main themes of the first report, re-emphasising certain points and adding several new questions. Whilst the report recognises that some parts of the world remain strongly affected by the COVID-19 virus, it also reflects the returning normality of the UK position. The confident response recorded by large numbers of Chinese parents confirms the continued popularity of UK boarding schools, despite new economic and social pressures, but also reflects a rapidly changing international market.

Above all, the aim of this report is to provide independent feedback to schools as they seek to meet the needs of their international boarders, and maintain parental confidence within the UK boarding sector. It does not claim to be comprehensive or to cover every aspect of a child's experience. It nonetheless draws attention to many of the strengths and some of the weaknesses in current provision for international students across a broad spectrum of UK boarding schools. Further annual surveys by BSA and Connexcel will extend our knowledge of this important educational field and focus more deeply upon some of the key issues raised.



The Composition of the Survey Group

The 2022 survey divided participants into more detailed subgroups than did the 2021 survey. It was thus able to separate out children who had received offers from schools but had not yet started boarding school (20%). The questionnaire identified that 49% of those responding had children already studying in UK schools, whilst 31% were still preparing for their children to study abroad.

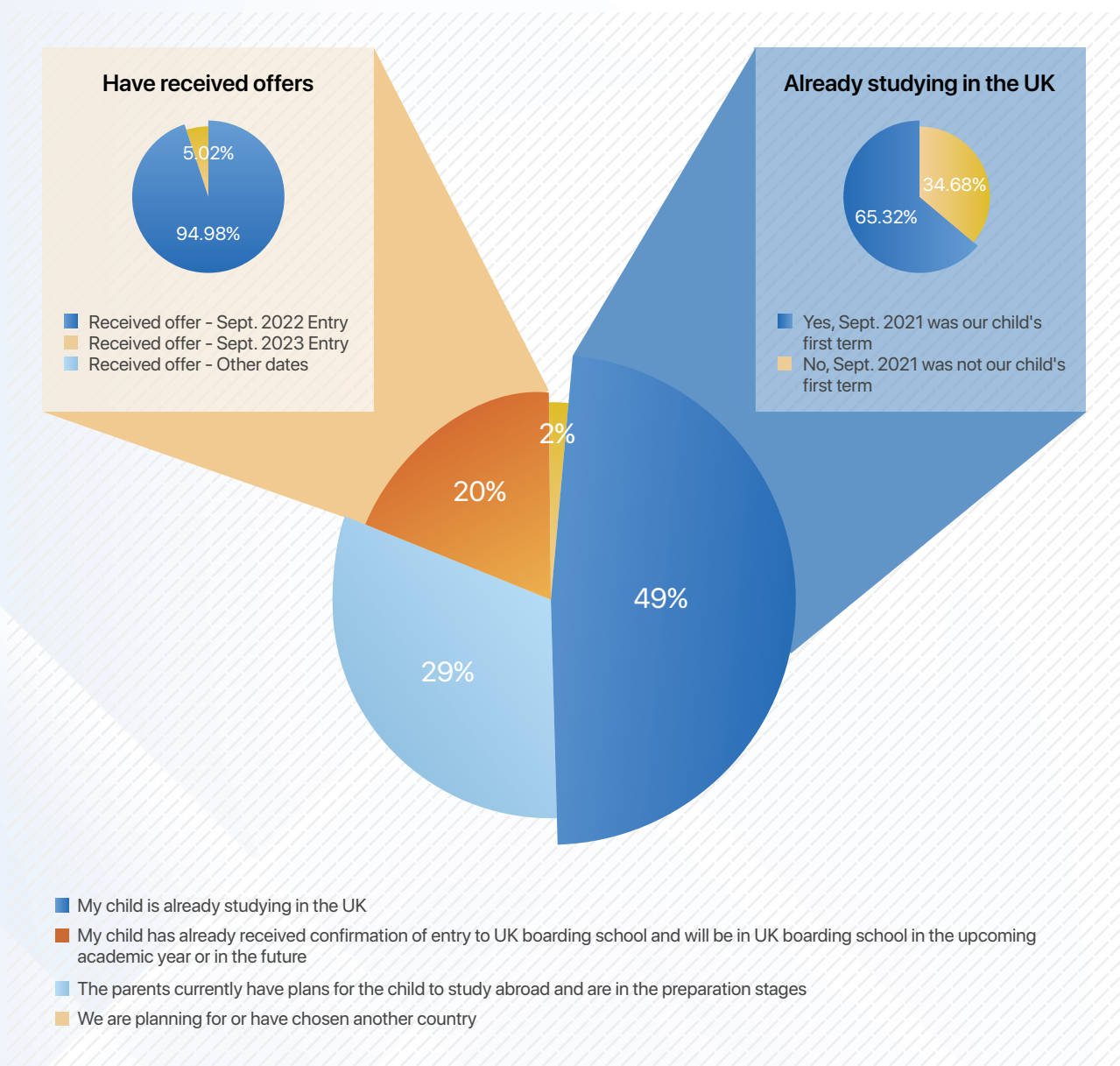


Chart 1: Composition of the Survey Group

The questions that targeted current boarding school parents only clearly give us a more accurate picture (percentage) than those of last year, as students who received offers but had not yet started are no longer included. Among the current boarding school parents answering the survey, 65% had entered before September 2021. The rest (35%) had just completed their first year.

Among children who had received offers from schools but had not yet started boarding school, over 95% of prospective parents were looking for entry in September 2022, while the remainder were looking for September 2023 and onward entry.

It was pleasing to note that the percentage of prospective parents participating in this year's survey increased significantly, from last year's 8% to 29% in 2022. This helps us to gain a much more accurate understanding of prospective parents' concerns and needs. The increased percentage is also a strong indication that more and more families are thinking about international study, as the world is reopening after Covid-19. Several other reasons may also be having an impact.

Chinese overseas entry to UK boarding schools

1. Chinese school types

The total number of those responding to the questionnaire increased by 30% compared with last year's, with the mix of participants fairly similar to that of the 2021 survey. 70% came from international or private schools in China, with only 25% coming from state schools. 5% came from international branches within state schools. It is particularly interesting to note that 60% of those who participated in the survey had never had the experience of studying abroad and only 30% had participated in last year's survey.

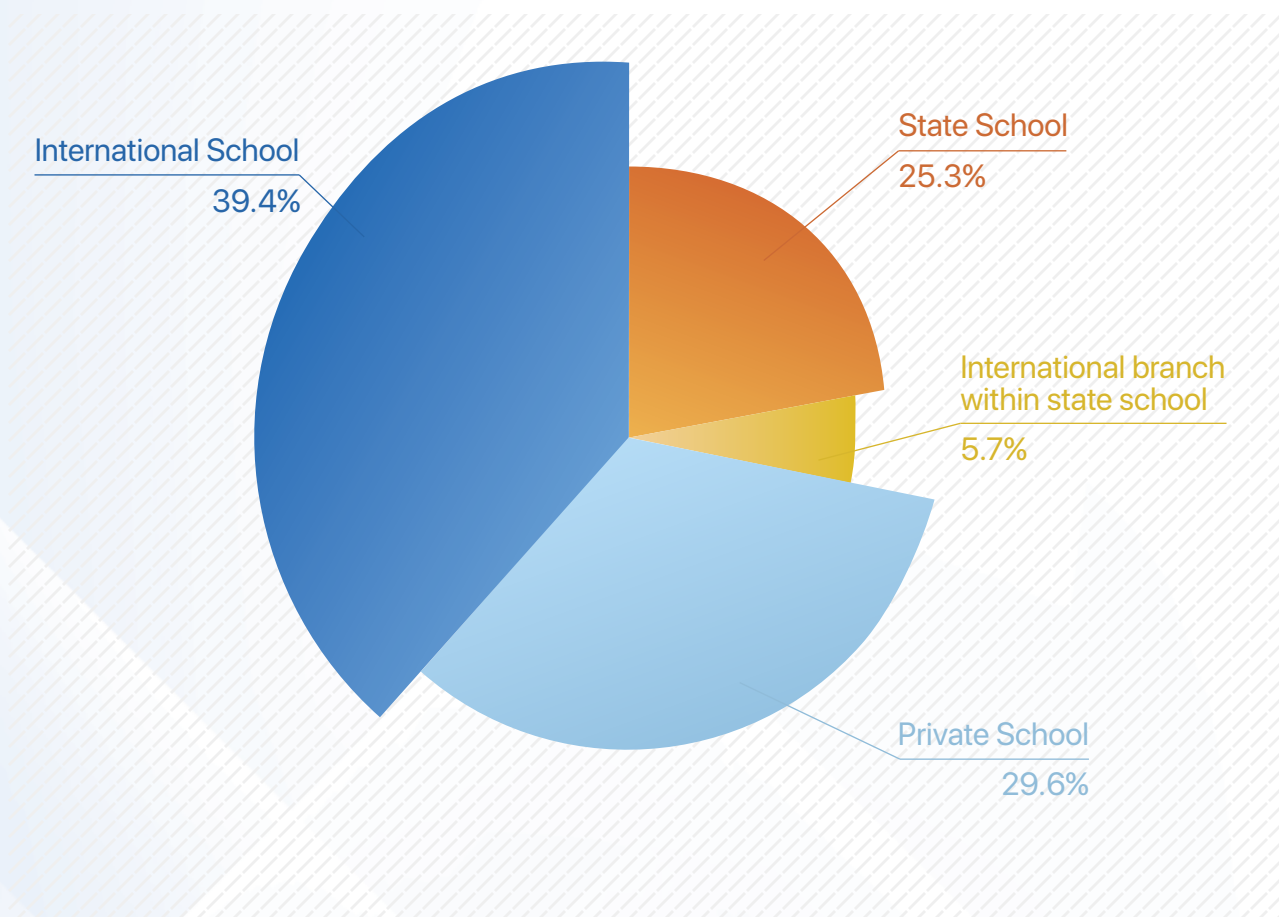


Chart 2: Chinese school types

2. Planned overseas study entry points

Years 9, 10 and 12 remain the most popular entry points for Chinese students although 9% applied to enter into Years 8 and below. The Prep School market (Years 6, 7 and 8), whilst appearing to have limited appeal at the moment, may yet be a growth area. Some discerning parents see the value of an early start at say Year 7 or Year 8, as they seek the best choices of senior school for their children. These parents recognise that a younger entry for their child may mean a smoother path from a traditional UK-based Prep School than from a school in China. The acquisition of English may also be accelerated in a well-resourced Prep School.

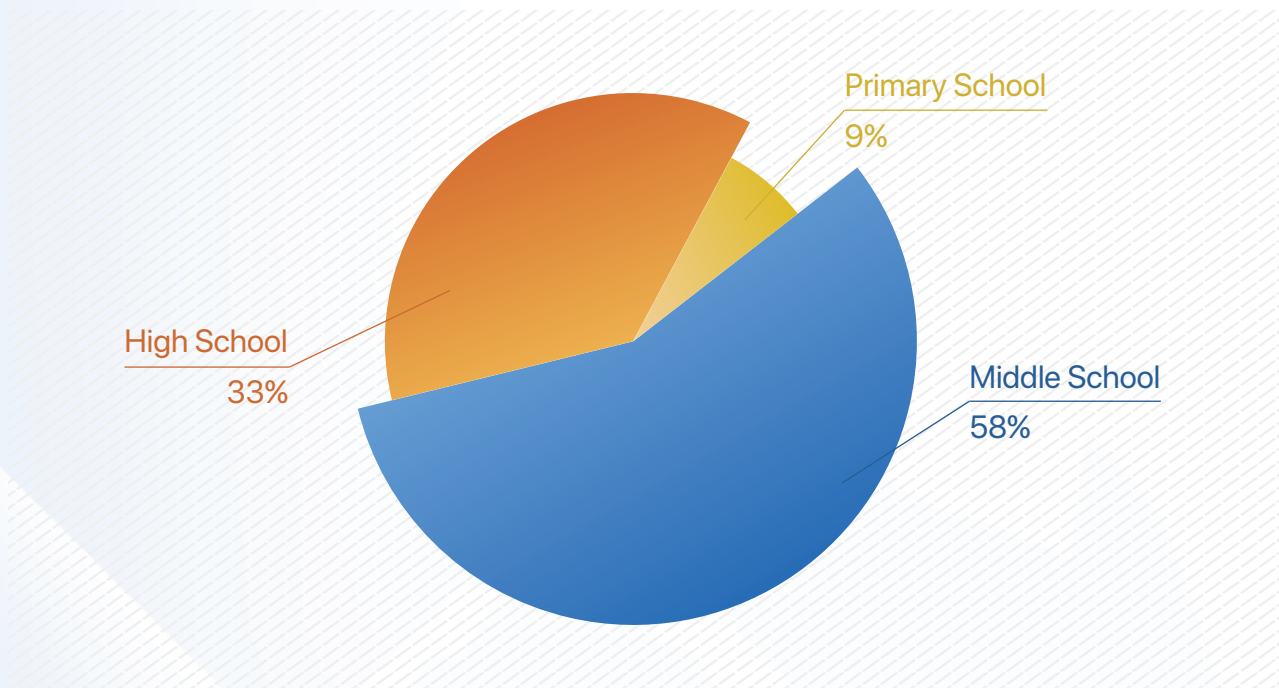


Chart 3: Planned overseas study entry point

Chinese education age system:

Primary School: Age 6 - 11/12; Middle School: Age 11/12 - 15; High School: Age 16 - 18

Questions to consider

- How well prepared is the student? What is the standard of their English?
- Have they travelled or stayed away from home?
- Is a reliable agent involved with genuine knowledge of the student, the schools under consideration and an appropriate setting for the student's education?
- How thorough are the school's interview processes? Have they gained a clear picture of the student, their family and their needs?
- Will the school be able to provide appropriate support for international students?



The attraction of study abroad

1. Top reasons for studying abroad

Our report found that the overwhelming reason Chinese parents chose to send their children to study abroad is the offer of a more well-rounded education than is available in China (up from 77% to 85% this year). Of secondary importance was the pressure Chinese parents feel from their current education system (up from 40% to 57% in 2022). This was followed by those who felt UK boarding schools offer a greater chance for entry into a top world universities (up from 33% to 45%). The student's own decision also featured strongly.

We changed one of the lowest response answer options from the 2021 questionnaire – 'Studying abroad offers an international mindset and opportunity to improve English levels', to 'Provide better opportunities for future immigration' in order to find out whether it is one of the more relevant motivations. The response percentage was higher, increasing from 2% to 7%, though it was still the lowest category chosen. Well-rounded education, pressure from the current Chinese education system and greater opportunity to enter top world universities were still the main reasons given for parental choice.

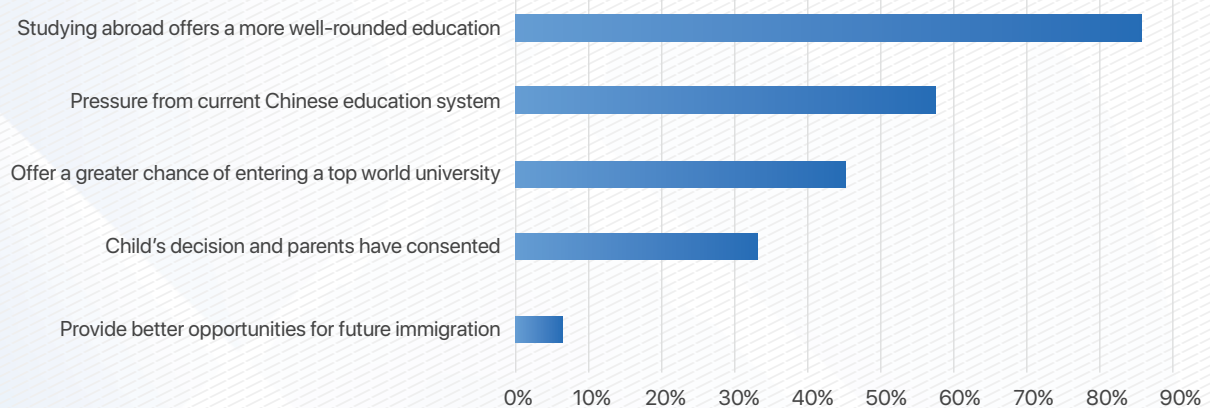


Chart 4: Reasons for studying abroad

2. What influences parental considerations on studying abroad?

The best age and timing for the commencement of study abroad is broadly similar to last year's results in order of importance and percentage score. Once again, we see choices strongly related to how independent he/she is (87%) and the child's own wishes (76%). Parental wishes appear to be a far less important consideration (20%), although parental confidence in their child's maturity levels is likely to be significant. The cost of boarding education was significant for nearly a third of the respondents last year and increased slightly in 2022 to 36%, whilst 43% considered the specific age entry point as a top three driver (up from 35%). This suggests that parents are prepared to prioritise funds which satisfy their child's wishes, but may be delaying entry in some cases.

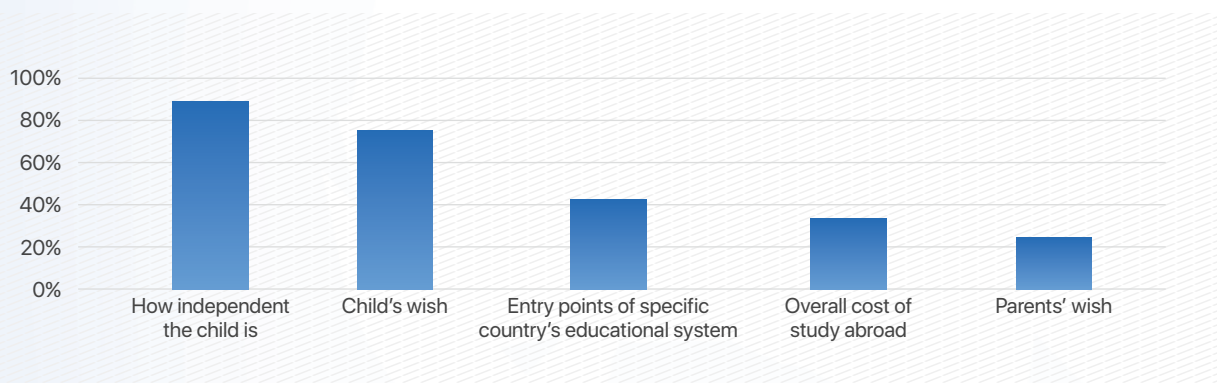


Chart 5: Parental Considerations

Our experience indicates that children are more willing to study abroad after they have had some form of experience in the UK through a taster session or a holiday camp. Short summer or winter courses are recognised as a great way to introduce UK boarding schools to Chinese children, although current travel restrictions largely prevent this.

Questions to consider

- These results indicate that parents are tending to agree with each other on the survey's top statements more closely than last year. Is this due to the changing circumstances of the past twelve months, and is this trend likely to continue?
- Are children at international schools in China gaining a truly international mindset?
- What kind of pressures has the child been under in their current setting?
- Schools need to consider how children gain confidence in overseas study. A summer course may be very helpful.
- Are agents fully in touch with the expectations of each school they recommend? Accurate two-way advice is vital both to parents and from potential schools.

3. Preferred study destinations

The preferred two study destinations identified by Chinese parents were once again the UK and the USA. This may be mainly due to the survey participants already holding a bias towards the UK. However, we noticed that the US percentage had increased by 20% for both pre-university and university entrance, and this despite the current tension between China and the USA (70% would choose the US for University against 96% for the UK). Additionally, the other destinations, e.g. Singapore and Canada have seen a significant percentage increase. This may be an indication that parents are now seeking broader possible routes for their children as the world is re-opening after COVID, and coincides with other developments domestically and internationally in the last 12 months.

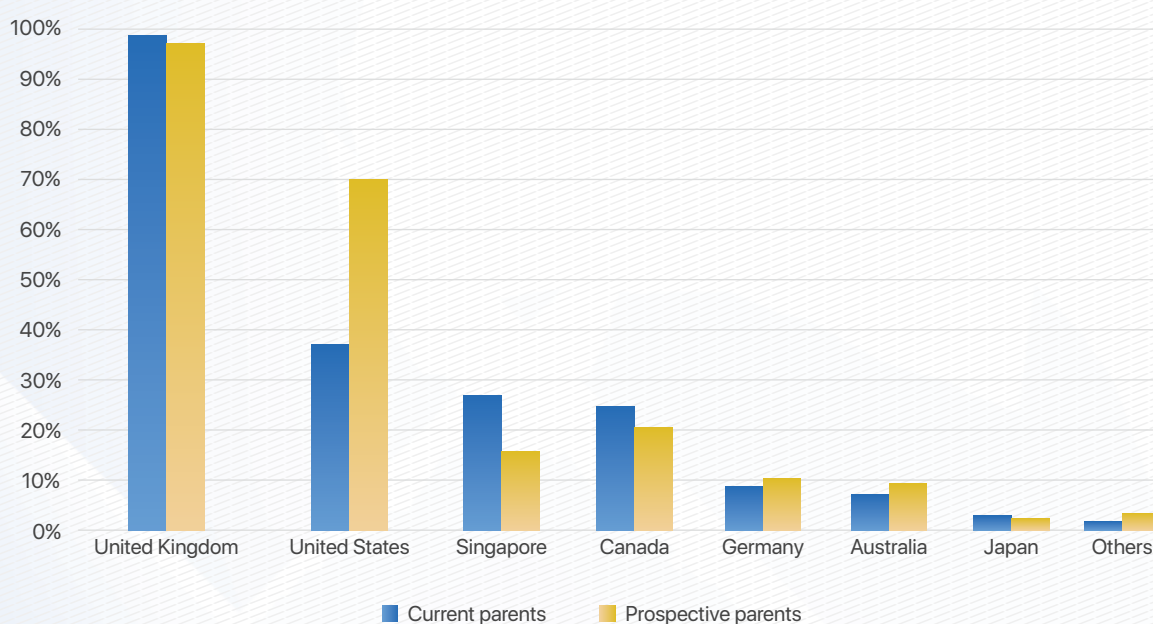


Chart 6: Destination Choices

When choosing a country for their child's education, parents identified educational quality and the safety and security of the country as of overriding importance, whilst 44% identified a country's attitude towards international students and 26% of parents also recognised employment prospects and the host country's immigration possibilities as significant to them.

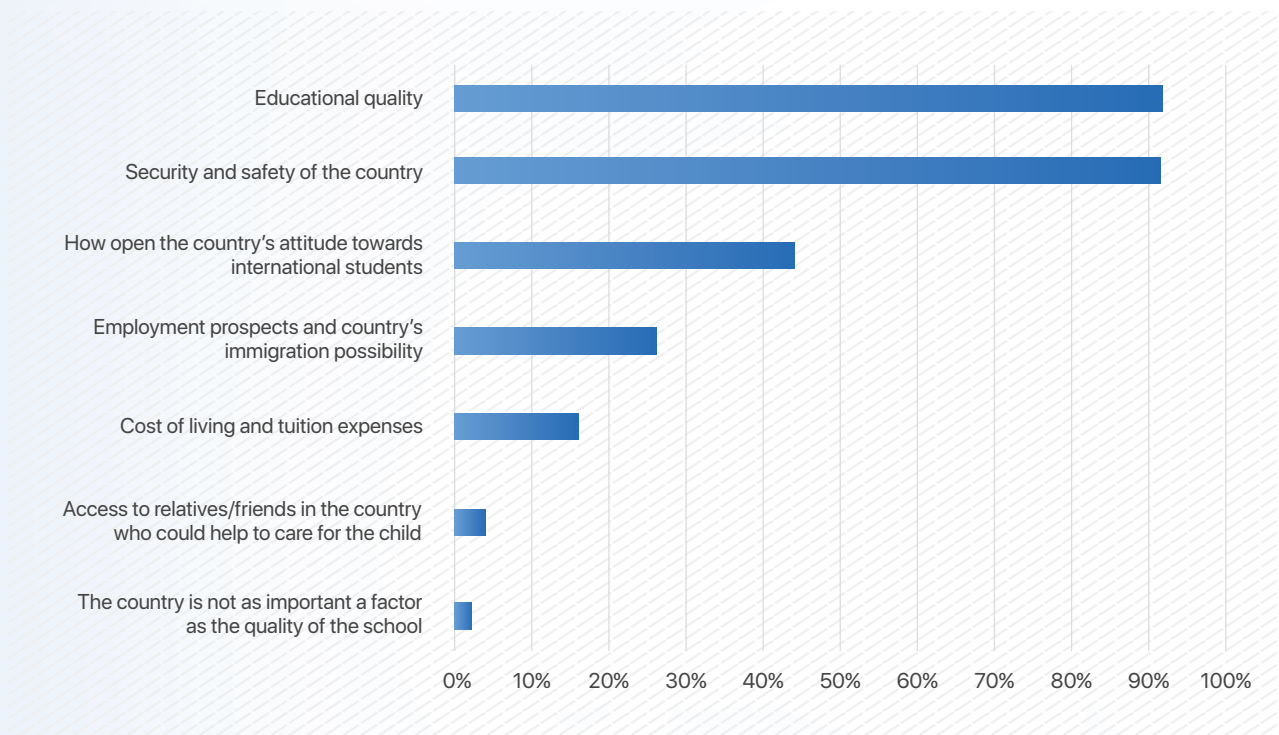


Chart 7: What Matters Most To Chinese Parents

Questions to consider

- How much do schools inform international parents about the merits of UK universities? Are Chinese parents fully aware of the range of university options available to their child apart from the well-known Oxbridge/London destinations?
- Do schools invite former international students at university to return and speak to students at their old schools?
- How far does the school seek to show evidence of internationalism and demonstrate equality of opportunity?
- Are all staff (both academic and domestic) trained to think internationally? How many staff come from a non-UK cultural background?
- Does the school have active learning links with other schools in other countries?
- How do schools strike a healthy balance between safety and security for students with growing independence and responsibility?



Choosing a school abroad

1. Key factors for choosing an international school

Parents were asked to rank eight factors in order of importance, when choosing a school abroad. Top of the list was finding the right match between the school and the child's abilities/talents (98.5% vs 96.82% in 2021). Next came pastoral care and experience in looking after international students (94.8% vs 92.73% in 2021) followed by academic results (96.7% vs 90.91% in 2021). These were the three key factors when parents were choosing boarding schools. School facilities, though important, were slightly lower at fourth place, whilst the reputation of the school was fifth. Bottom of the list was geographical location. Parents were relatively less worried by the numbers of Chinese students or the percentage of boarders.

It is clear that parents attach great importance to finding the right match between the school and their child's abilities and talents. This makes an honest appraisal of the child's potential essential, together with a clear understanding of the special characteristics of the school, its ethos, values and academic standing. Parents sometimes misunderstand the particular strengths of the school and attach too much importance to a well-known name.

Parents value unbiased, well-informed advice and it is here that a reputable educational consultant is so important. Parents in other countries still have very limited knowledge of UK schools and tend to rely on quite limited measures of quality, such as league table ranking or websites. Schools therefore need to offer as broad a perspective as possible.

The search process may take several years and will ideally include a physical visit to the UK school and meetings with key staff and students. This visit may be the only one for several years.

Some schools participate in international marketing events and whilst it has not been possible to travel in person due to COVID restrictions, opportunities continue through agency webinars, consultations and conferences. It will be vital for UK schools to maintain their profile internationally through participation in personalised international events and digital meetings etc.

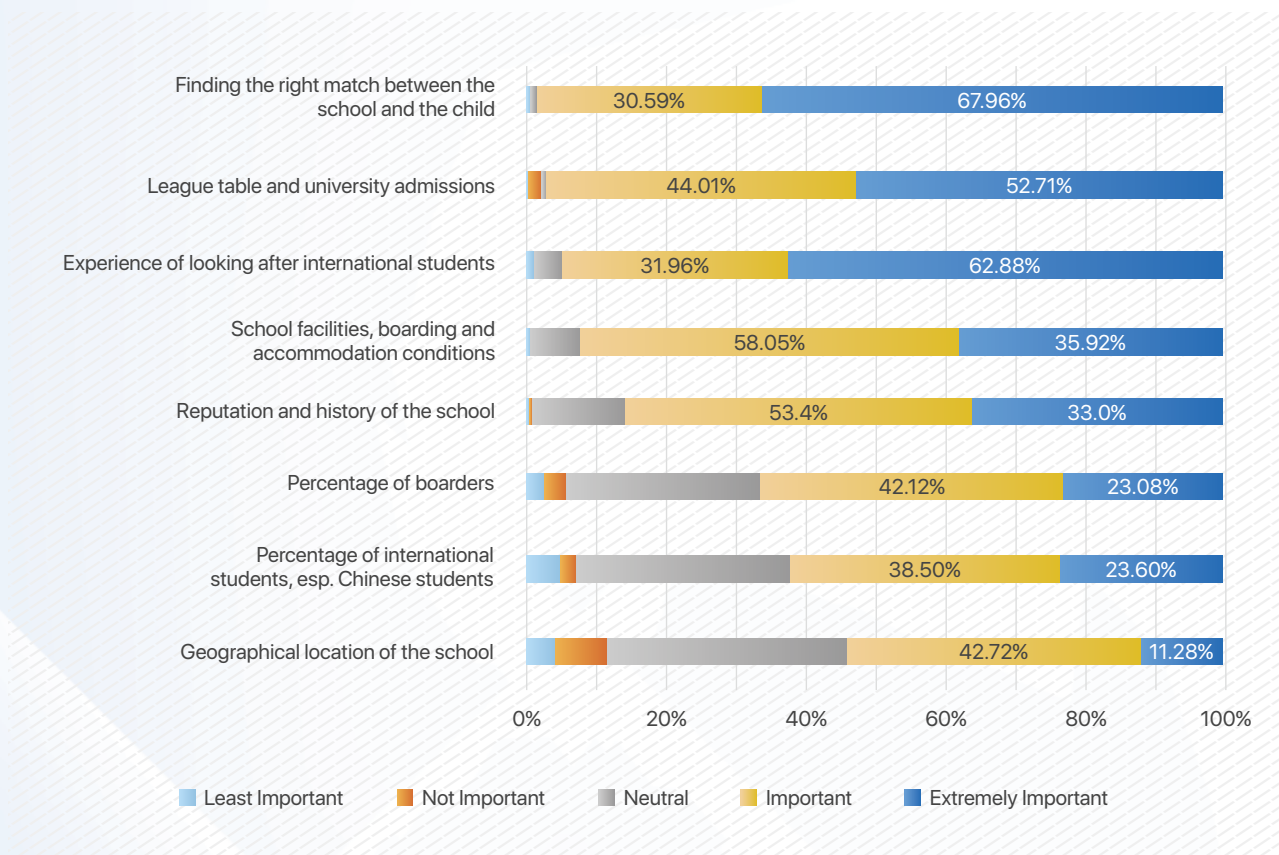


Chart 8: Key Factors for School Selections

Questions to consider

- What systems are in place for communication between schools and international families?
- Does the school do well with the children it recruits and how does it show their progress?
- Does the school have an effective EAL department? Is pupil progress in English regularly assessed and reported to parents?
- Are international students allowed to study a limited range of subjects at least to begin with?
- Do staff make a special effort to meet or contact international parents and/or include guardians if parents cannot attend academic progress meetings?
- How far are international parents able to recognise student outcomes at different levels, including at 18+, leading to positive career opportunities?

2. Sources of information for international parents

Parents were asked about the most important sources of information when choosing to study abroad. Here the order of importance and percentage was very similar to last year. However, it was interesting to note that recommendations from educational agents increased from 74% to 84.5% this year, suggesting Chinese parents' growing reliance on the information provided by educational agents.

Official school websites were deemed important (66%), as were recommendations by friends and family (34%). Personal visits where possible were also very significant (27%) as was the domestic Chinese internet which gained recognition (up from 22% to 33%).

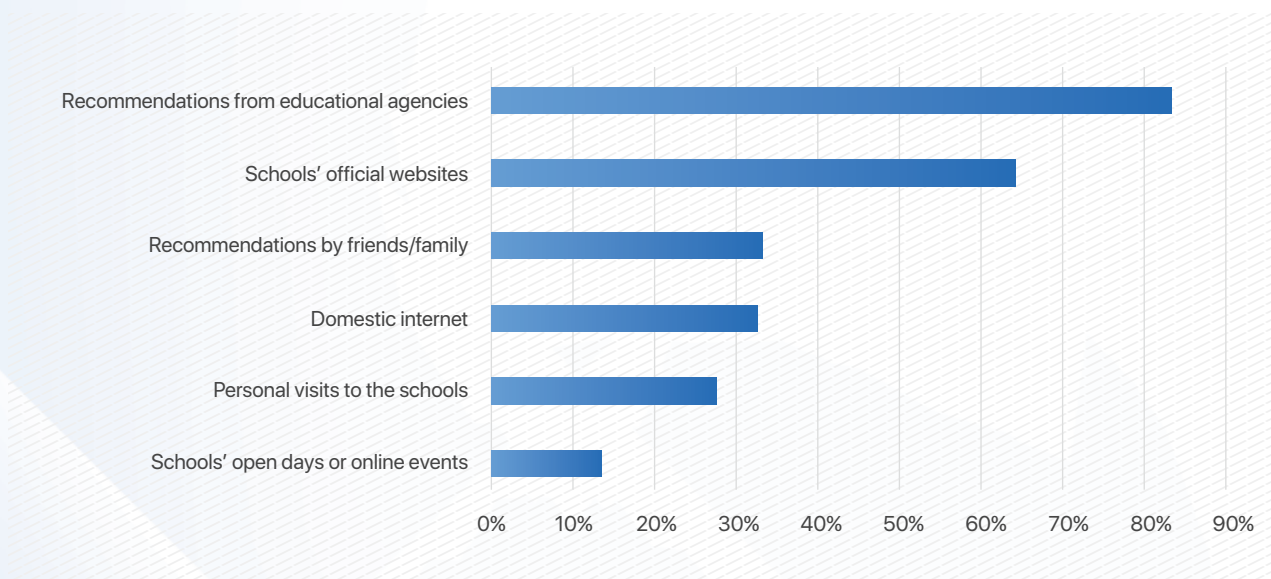


Chart 9: Sources of information for selecting UK schools

Questions to consider

- Does the school's website and marketing material communicate effectively with an international audience?
- How far is the school making use of its alumni, as well as satisfied current parents?
- Does the school provide evidence of improvement and the outcomes for its Chinese students?
- Short films including 'student voice' and feedback may be effective but can be blocked in China in some forms.

3. The Importance of the Agent

Asked how prospective parents planned to apply for their children to study abroad 80% said they would make application through an educational agency (an increase of 15% of that last year's) and only 14% would make a personal application (a 12% reduction of that last year's). Combined with the findings about the main information source of choosing to study abroad, it confirms an increased reliance on agents from prospective parents. The order of importance and percentage among current parents is roughly consistent with last year's survey, with a small percentage swing, which is probably within the 'tolerance range', though it may indicate a trend moving forward among prospective parents.

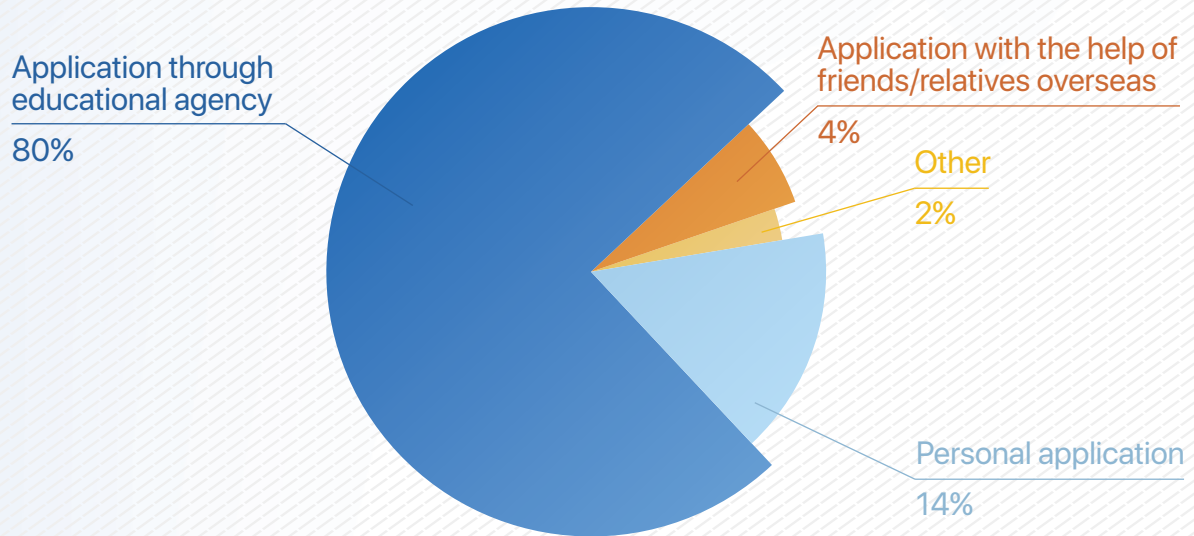
Finding the right agent is essential, both for the school and the parent. Experience suggests there are no shortcuts and good agents attract suitable families for specific schools. There are dangers in working with unproven or inexperienced agents. Schools need to beware of agents who charge high fees and attract parents who lack judgement. Schools usually aim to work with trusted agents who demonstrate the best credentials, who are professional and offer a comprehensive service (possibly including guardianship services).

The Boarding Schools' Association (BSA) offers certification schemes for both educational agents and guardians.

<https://www.ukbsa.com/bsa-certified-guardian-scheme/>

<https://www.ukbsa.com/bsa-certified-agent-scheme/>

How prospective parents plan to apply to schools



How current students applied to schools

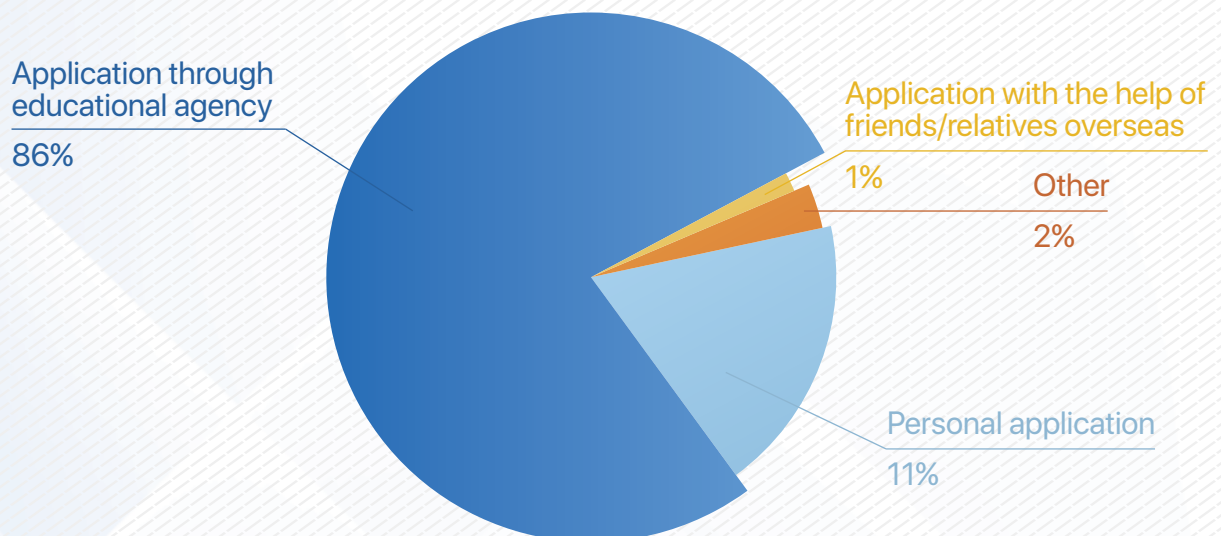


Chart 10: How prospective and current parents make the application

Questions to consider

- UK schools should be aware of a growing trend amongst Chinese parents to seek specialist help and advice. Schools may wish to work more closely with one or more qualified agents.
- Does the agent regularly visit a range of UK schools to maintain a warm relationship and develop their understanding of the setting? Have they visited your school recently?
- Does the school have a formal agreement with the agent?
- What is the reputation of the agent?
- How effective is the agent in securing and supporting suitable candidates?
- Does the school review the strength of its relationships with one or more agents and also provide some feedback on how students have performed in a particular setting?
- Can the agent show certification by a recognised UK organisation such as the BSA?
- Schools have a duty to report to UKVI any third-party organisation they are working with and should exercise due diligence before developing any new agency relationships.



4. Key factors for parents choosing an Agent

The factors considered by parents in selecting an agency were placed in rank order and here the professionalism of the Agent was deemed important or extremely important by all respondents. Accreditation from local organisations was ranked highly with 96% and in third place was the provision of guardianship, particularly important amongst prospective parents. This highlights the important value parents place on guardianship after the difficulties presented by the COVID situation.

Parents showed a liking for agents who were registered in the UK or were UK based, though brand awareness was of less significance and 71% would look to recommendations from friends and relatives. Fees charged by agents were ranked fifth overall with 76%, although clearly this will be an issue for a significant group of parents within the sample.

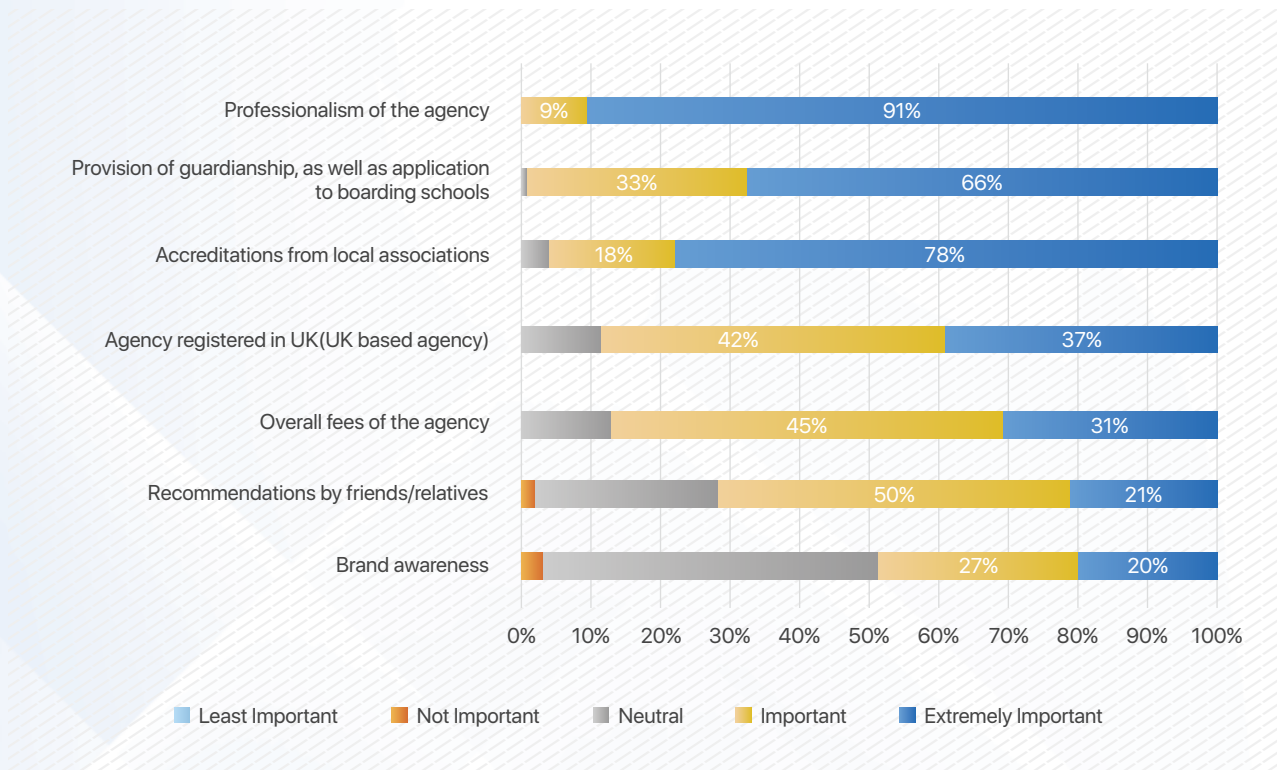


Chart 11.1: Key factors for choosing an agency - prospective parents

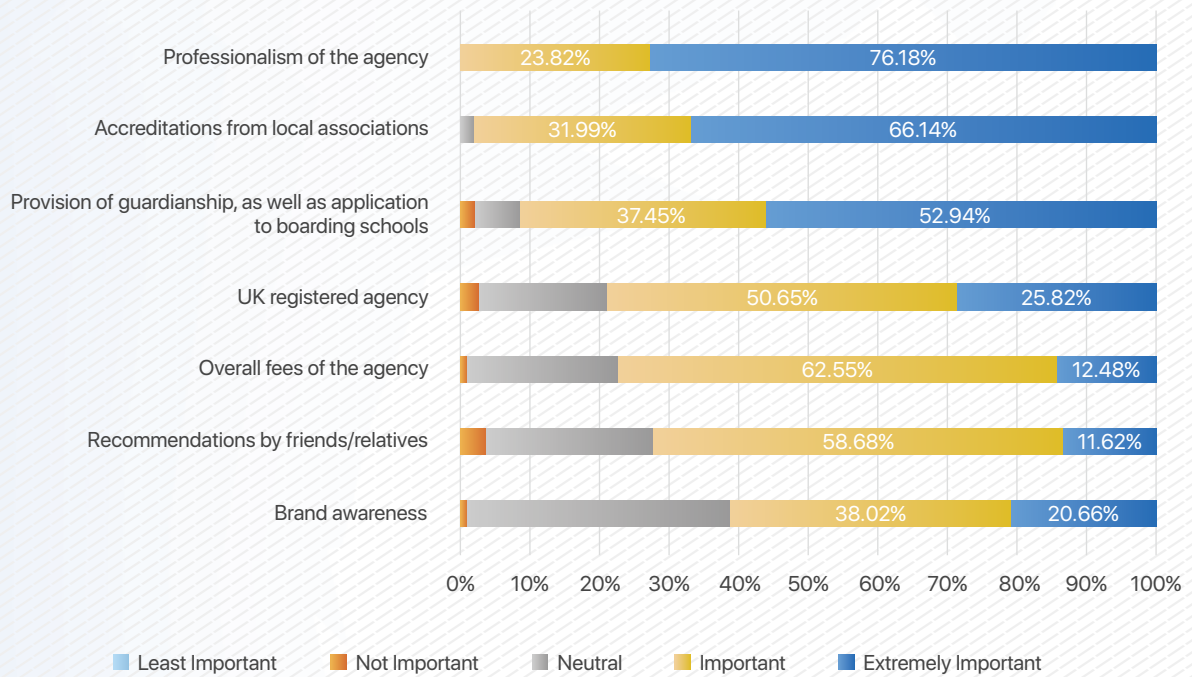


Chart 11.2: Key factors for choosing an agency - current parents

Questions to consider

- What should parents expect from a good agent?
- Does the school use agents who offer guardianship services?
- Does the school work closely with agents and guardians in seeking to help them in their role?
- How much information does the school release to agents and are agents aware of the information schools require about prospective pupils?

5. Length of preparation period for study abroad

The order of importance and percentage figures for this question are very similar to those of the last year's survey, both for prospective and current parents. Most parents (75%) choose to prepare their children well in advance of any move to a UK boarding school and for the majority this will be between more than 12 months. This gives plenty of time for the child to start making adjustments in their learning and to respond to any specific recommendations from their new UK school.

UK schools recruiting students from China are likely to request a raft of academic and other information from Chinese schools before they make any offer. Here, there may be scope for working with the agent to understand recommended material which will be of help to the student as they acquire the necessary literacy skills to access the curriculum in British schools. Good agents will be able to help to interpret school requirements, providing reassurance, interview practice and further guidance for the student through tutorial support.

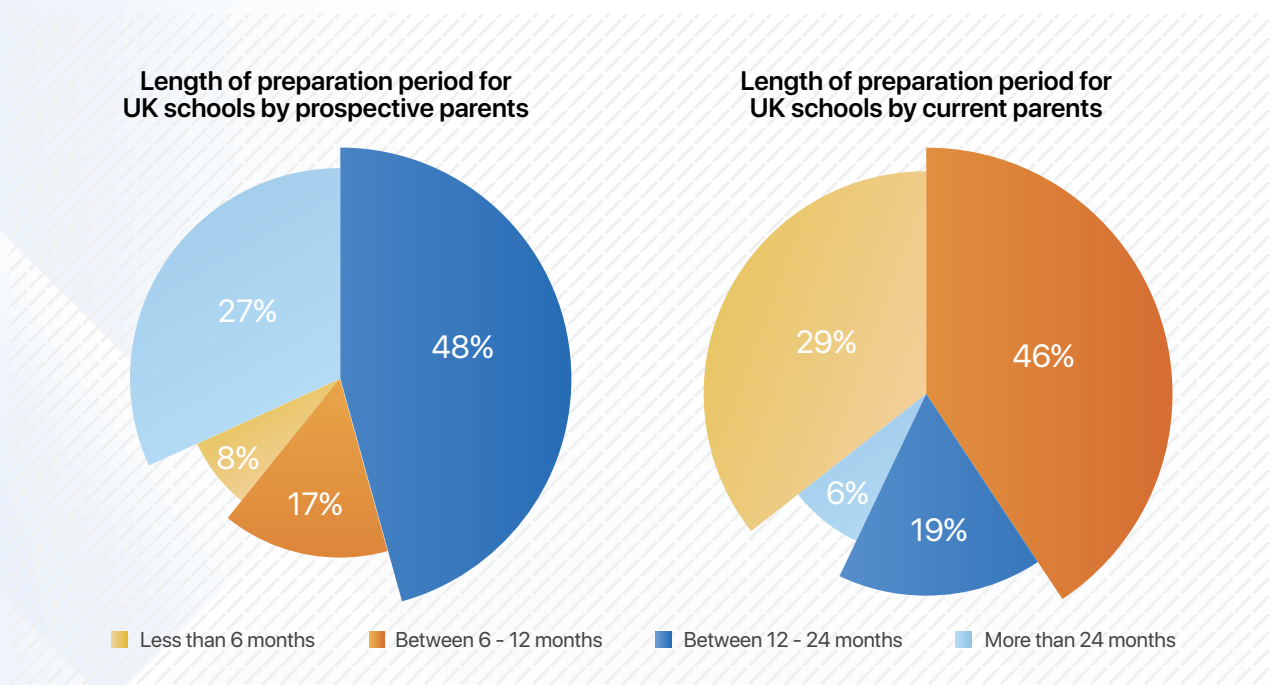


Chart 12: Length of Preparation period for UK School

Questions to consider

- How much advice or coaching is the school prepared to give in advance of the student's arrival in the UK?
- Does the school have a developmental programme and reading list, to help the student adjust to their future learning programme?
- Some schools may offer a taster visit for students to gain confidence prior to their starting properly the following year.

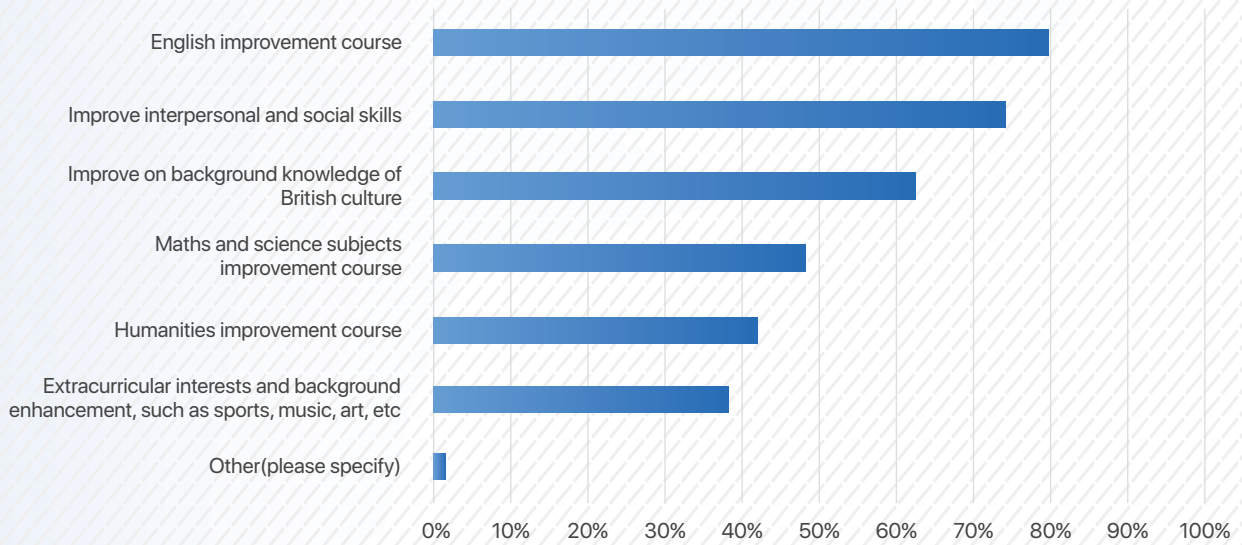
6. Preparing for UK education

The survey demonstrates that both prospective and current parents place importance on preparing the child for their new boarding school life and that their preparation often covers a wide range of academic subjects as well as extra-curricular activities.

Amongst prospective parents, English improvement (80%) came top, with interpersonal and social skills (74%) and background knowledge of British culture (63%). This compares and contrasts with the top three choices amongst current parents already in the system. Here, English improvement (90%), increased in importance, with interpersonal and social skills (50%) and background knowledge of British Culture (40%) showing marked decreases.

The overall and average percentage of prospective parents who utilise improvement courses is much higher than those of current parents, or indeed those with a child who has already received a school offer. It suggests that prospective parents believe in the importance of such courses and perhaps points to an anxiety about entry.

Preparing for UK Boarding School System - Prospective parents



Preparing for UK Boarding School System - Current parents

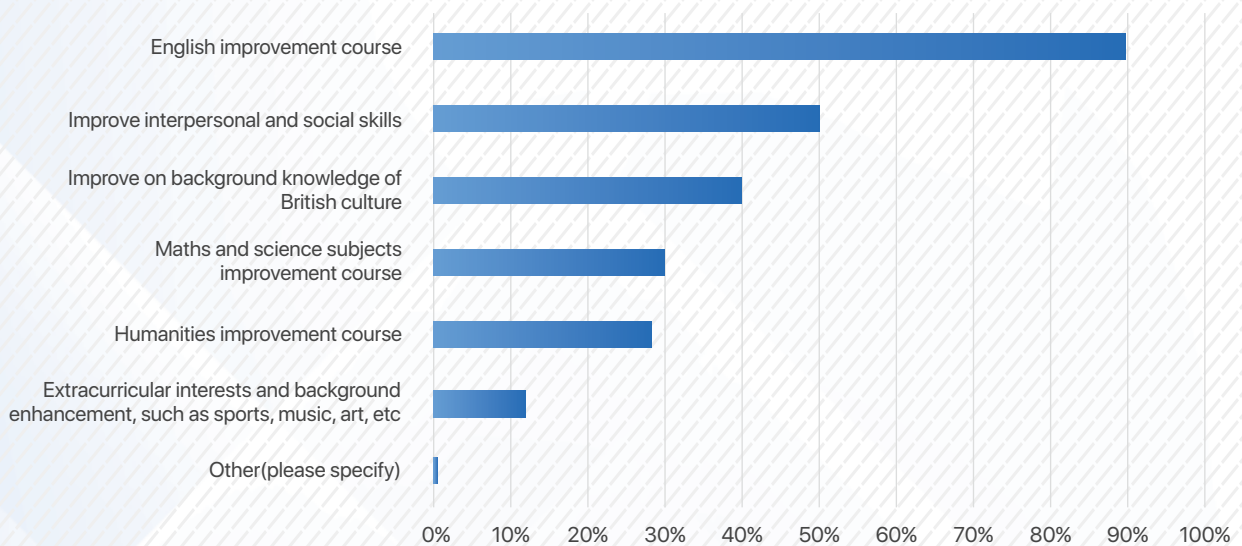


Chart 13: Preparing for UK Boarding School System

Questions to consider

- Is there a trend towards more coaching amongst prospective applicants?
- The Agents and schools that can best support parents with preparation will be appreciated and favoured when parents make their school choices.
- Should schools be doing more in terms of the direction of any preparation or coaching in China so that students make a successful start in the UK?
- Do schools offer a suggested reading list for international students in advance of their entry?



Factors which may influence parents' decision making

1. Changes in national education policy

There have been some significant changes of direction in China's education policy in the last 12 months such as 'double reduction', a cap on high school admission percentages and others. The survey question was therefore adjusted accordingly.

One survey question was concerned with the impact of recent changes to the domestic, private and international education system in China, which affected parents' decisions to support students studying abroad. According to the survey results, the overall total percentage of those delaying (10%) or no longer considering boarding school (12%) is significantly lower than last year's figures which were 26% and 22% respectively. However, 34% accepted that short term changes in the domestic and foreign economic situation have conversely influenced their decision-making and they would be bringing their plans forward. 44% stated that their decision to send their children abroad had not been impacted.

These statistics suggest that China's education policy is likely to have a positive impact on UK international boarding school admissions. Indeed, it may be fair to say that this market is gaining in strength rather than weakening as some might fear, at least in the short term.

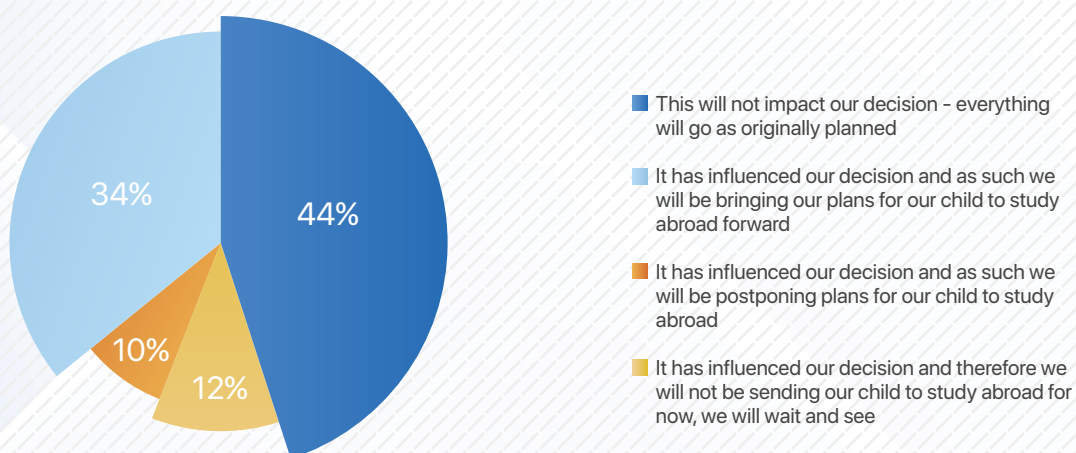


Chart 14: The impact of China's education policy change on prospective parents' choices

"Will recent short-term changes in the domestic and foreign economic situation affect your decision to study abroad?" is a newly introduced question. It looked specifically at the short term domestic and foreign economic situation in China and how changes may impact parental decisions. 41% said it would not impact any decision and everything would go on as originally planned, although it will cause some degree of uncertainty among 19% of prospective parents. It is interesting to note that some parents would like to pull forward their original overseas study (27%) and this is greater than those who are likely to postpone their original plan (13%).

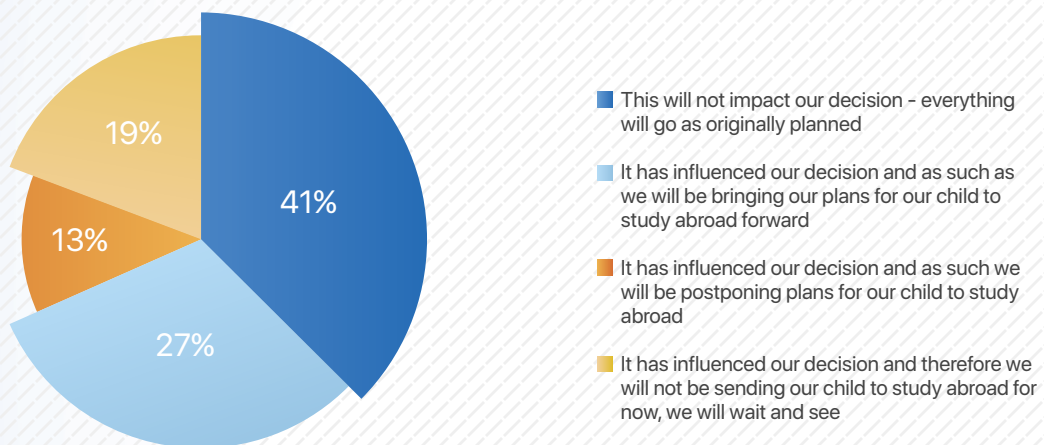


Chart 15: The impact of domestic and international economic situation change on prospective parents' choices

Questions to consider

- What are the key benefits of sending students to boarding schools in the UK as opposed to international schools in China?
- How much do parents value the quality of teaching and continuity of tuition offered by UK schools? Some schools in China have experienced difficulties with staff recruitment.
- Do UK schools have an advantage in placing students at good universities?
- Do schools in the UK explain their educational philosophy fully enough to international parents?

2. The impact of COVID-19

The survey looked at the impact of the pandemic on plans for children to study abroad. Parental concerns over COVID appear to have eased significantly. 43% of prospective parents and 38% current parents agreed that the UK at least is back to normal. 31% of prospective parents and 61% current parents stated that COVID-19 will now not affect their overseas study plans, because their child's education cannot wait. In fact, no parents in the survey would abandon the idea of sending their child to study abroad compared to 5.5% last year. Thus, there was a high degree of confidence amongst the current parents already in the system.

However, it is fair to say 25% of prospective parents still feel uneasy about COVID and will wait for the current situation to improve before sending their child abroad. The main concern seems to be about China's domestic COVID situation and travel restrictions rather than that of the UK's position.

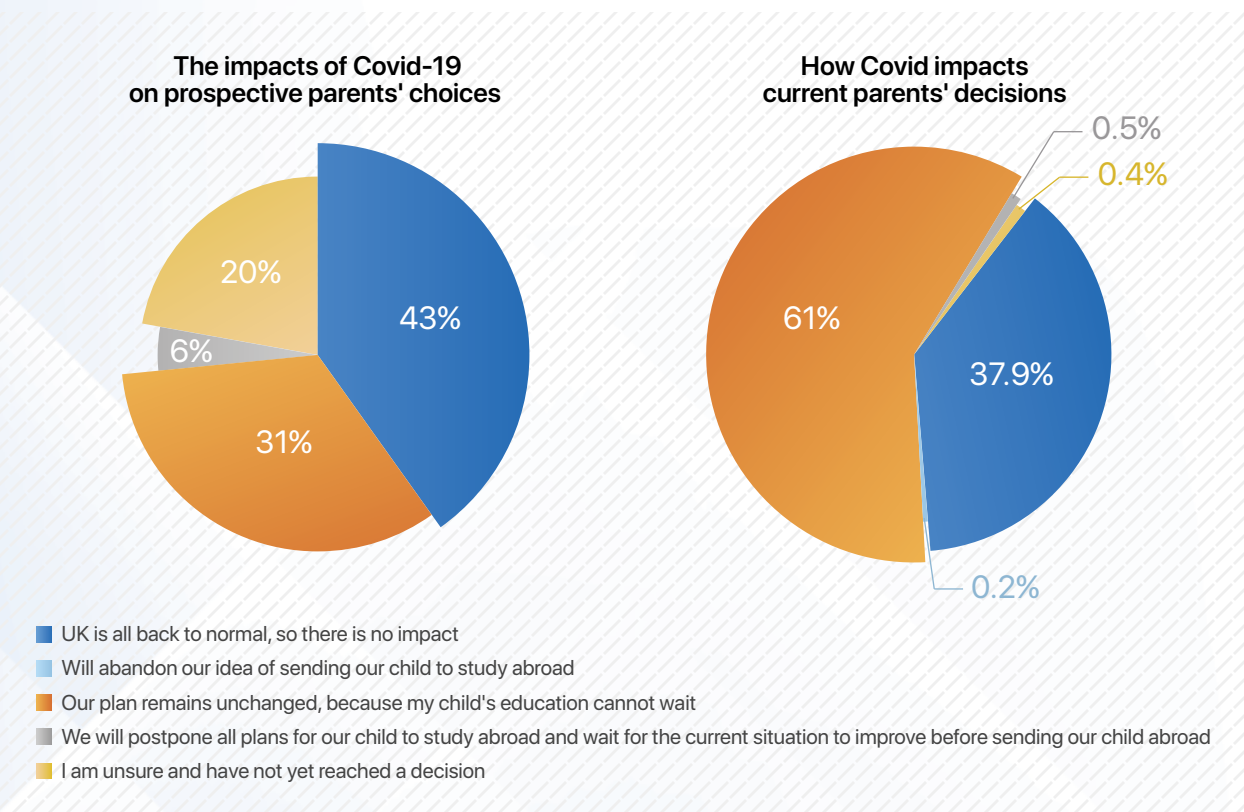


Chart 16: How Covid Impacts Parents' Decisions

3. Biggest concerns for study in the UK

The biggest concern in parents' minds as they consider boarding education in the UK is the issue of the round-trip flight, made more taxing with varying restrictions (56% for prospective parent and 92% for current parents). This, together with changes in the domestic quarantine policy (63% for prospective parents vs. 56% for current parents), government policies and the overall situation in China and abroad (55% for both prospective and current parents) were the top three concerns. The big gap between prospective parents and current parents regarding the round-trip flight also indicates that the difficulty is far greater than people imagined, as experienced by many families with their child's homebound journey this summer.

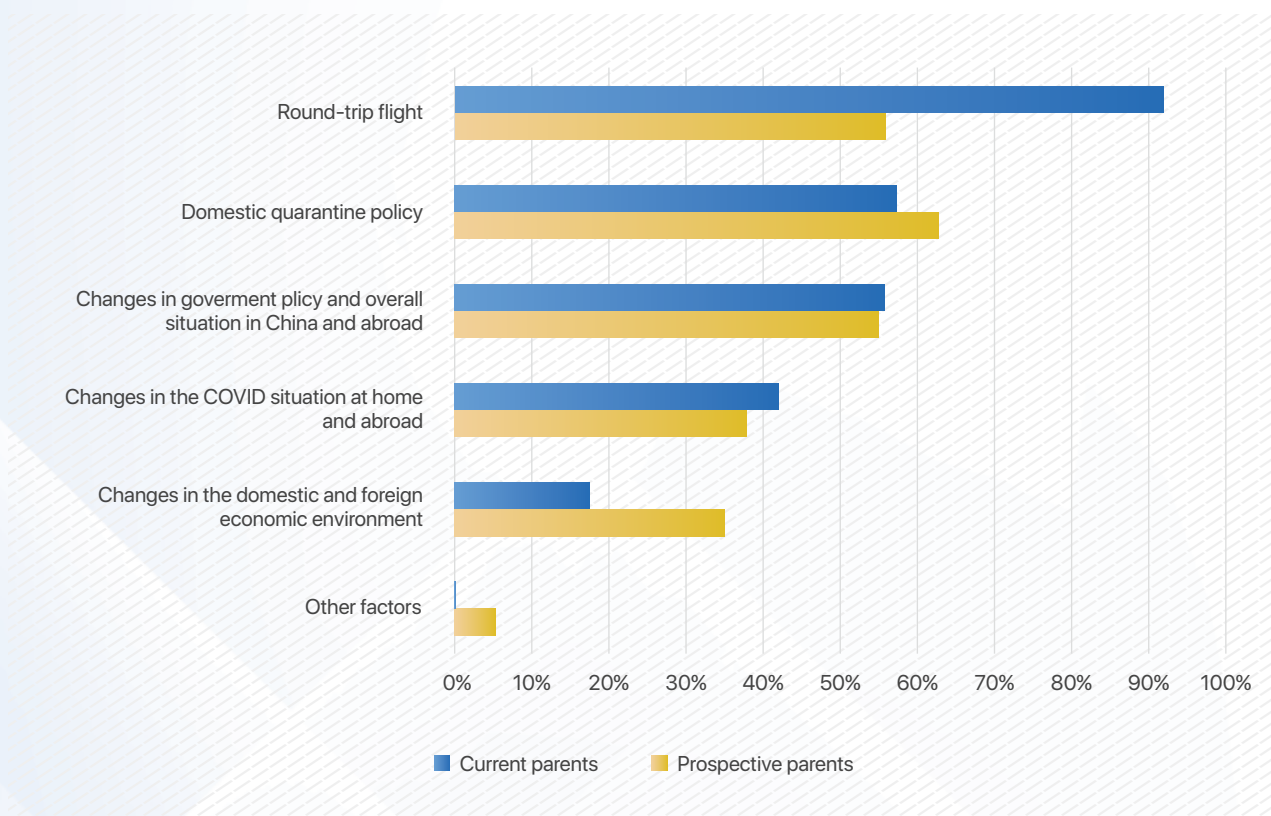


Chart 17: Biggest Concerns about Study in the UK

Questions to consider

- What do schools do to keep prospective parents in touch with what the school is doing and fully engaged with the forthcoming move to the UK?
- Has the School reviewed the experience of international boarders during the COVID pandemic? Do they provide clear protocols and policies should any similar situation occur?
- How easy is it for prospective parents and guardians to get advice over UK entry and health requirements?
- Is there any scope for families working together to provide escorted travel arrangements?

4. Parental concerns of students

The order of importance and percentages for this question were very similar to those of last year, both for prospective and current parents.

The child's safety and security are certainly the most important consideration for parents about to embark on an overseas school placement (79% vs 86% last year among prospective parents and 85% vs 83% among current parents). In second place was whether the child would suffer bullying or racial discrimination (65% vs 61% last year among prospective parents and 44% vs 58% last year among current parents). Of significant importance, in third place is the ability for parents to keep up with their child's mind and thoughts. Issues of inability to take care of themselves were less significant but real (27.5% vs 29% last year), whilst lack of familiarity with food, standards of accommodation (17%) and homesickness (5%) were identified by among prospective parents almost exactly the same as last year's figure. However, the same worries among current parents are significantly higher than those of prospective parents (35% vs 14%). This indicates that the students and parents experienced more difficulty with food, accommodation and homesickness than they expected before starting at UK boarding schools. A fifth of prospective parents were worried that their children would feel alienated from their families back home.

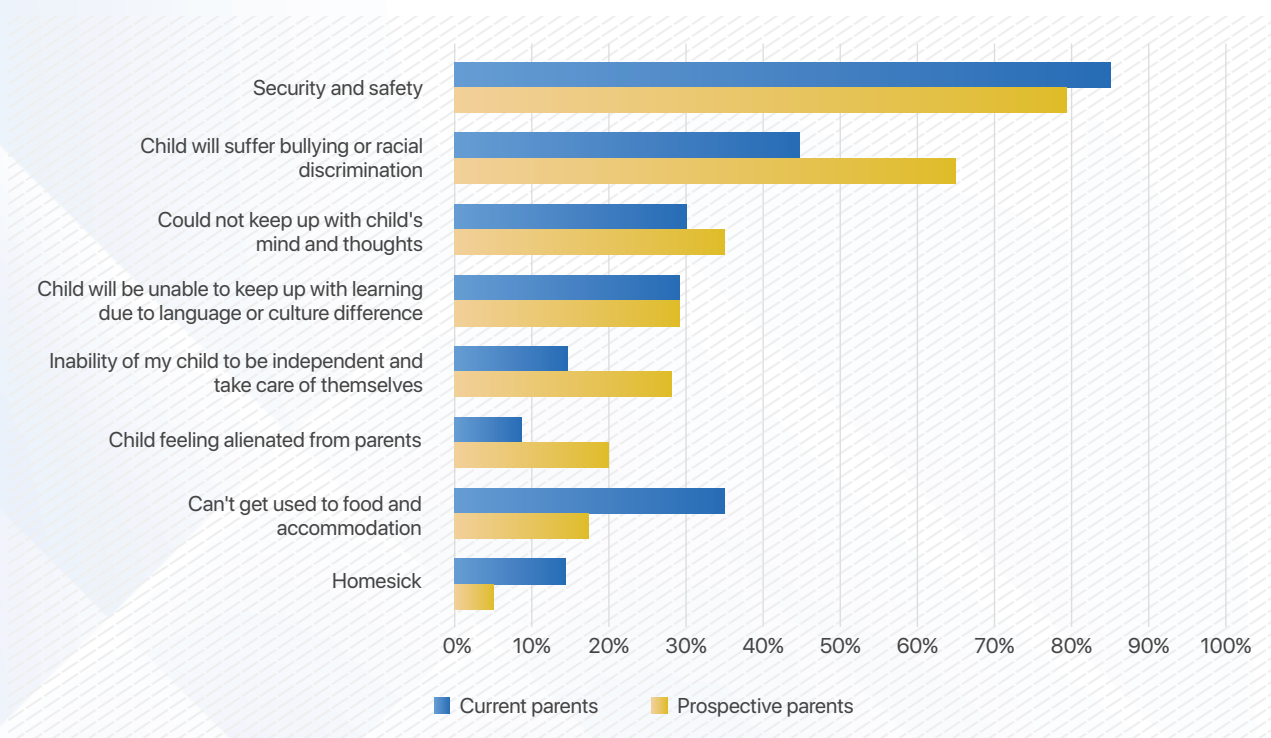


Chart 18: Parental Concerns of Students

Questions to consider

- Does the school have clear policies in place over bullying and racial discrimination?
- Does the school have an inclusive philosophy valuing all members of the community?
- How do schools ensure that students maintain close contacts with home and avoid any sense of alienation?
- How do schools improve international students' boarding and pastoral care experience further, especially regarding the variety and quantity of food provided, the accommodation and for any homesickness?
- Does the school have a catering committee with international student representation?



Confidence in the UK boarding sector

1. Positive benefits of studying in the UK

The feedback on the positive benefits of studying in the UK is consistent with last year's survey. Most parents answering the survey believe that studying in the UK has a very positive impact on their child; they become more self-reliant, and increasingly mature in their outlook (85% v 69% in 2021). They also become much better at independent thinking (80% vs 60% in 2021), as well as showing increased levels of consideration, empathy and tolerance of others (44% vs 35%). Parents were pleased with their child's much wider knowledge base (39% vs 32%) and 15% identified an improved relationship with their children.

Very few parents identified any negatives from studying in the UK, such as bad habits, less confidence or loss of interest in Chinese culture. This tells us a great deal about the high level of commitment of the entire family to its course of educational action.

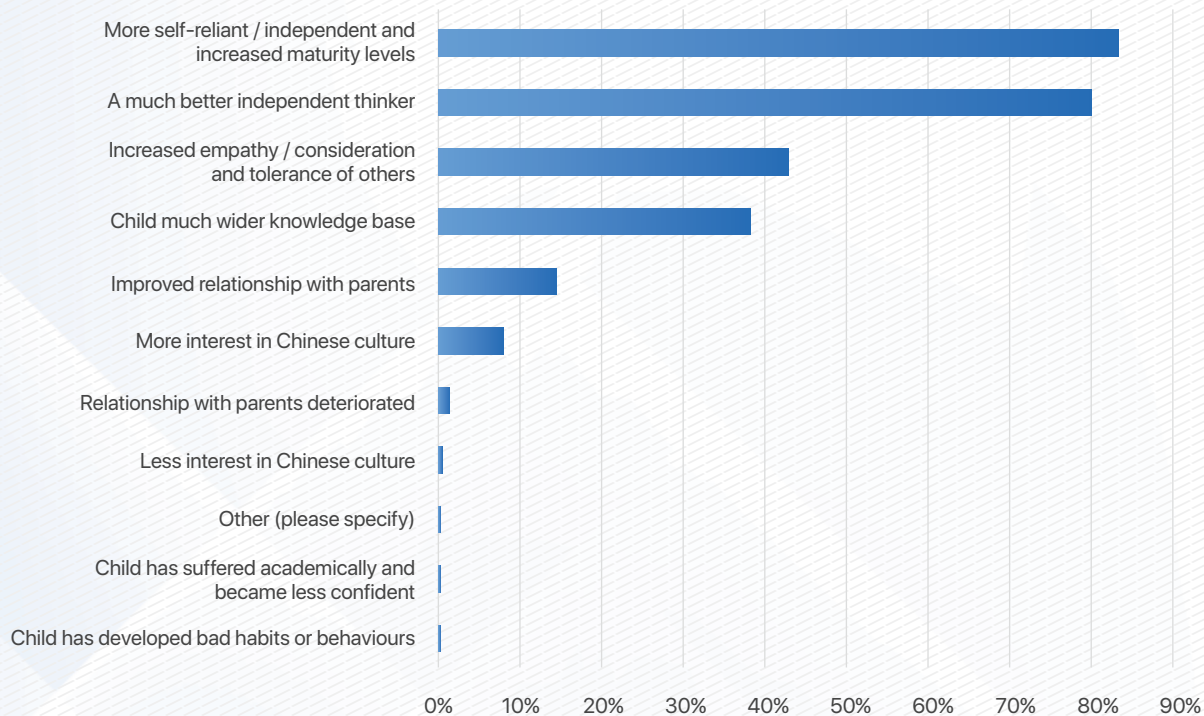


Chart 19: Benefits of studying in the UK - Current parents

Questions to consider

- Does the school provide specialist advice for international students?
- Are international student interests well represented by 'student voice' in school councils and prefect bodies?
- Are older pupils encouraged to mentor new arrivals?
- Are international students encouraged to share and celebrate their cultural interests with others?

2. The performance of UK boarding schools during the COVID pandemic

Parental opinion was once again extremely positive regarding the performance of UK boarding schools during the pandemic with pastoral care and the high quality of boarding staff particularly highly rated. This year's results are consistent with last year's feedback.

Campus safety and the boarding house environment attracted much more favour (86%) whilst extra-curricular activities and diversity of course selection attracted 82% positivity. However, communication with international parents and giving information on academic performance and career advice are still the area with which parents were the least satisfied and upon which schools needed to improve. The same sentiments are reflected in the answers to the open question - "If your child's current school could make one change to improve, what would this be?"

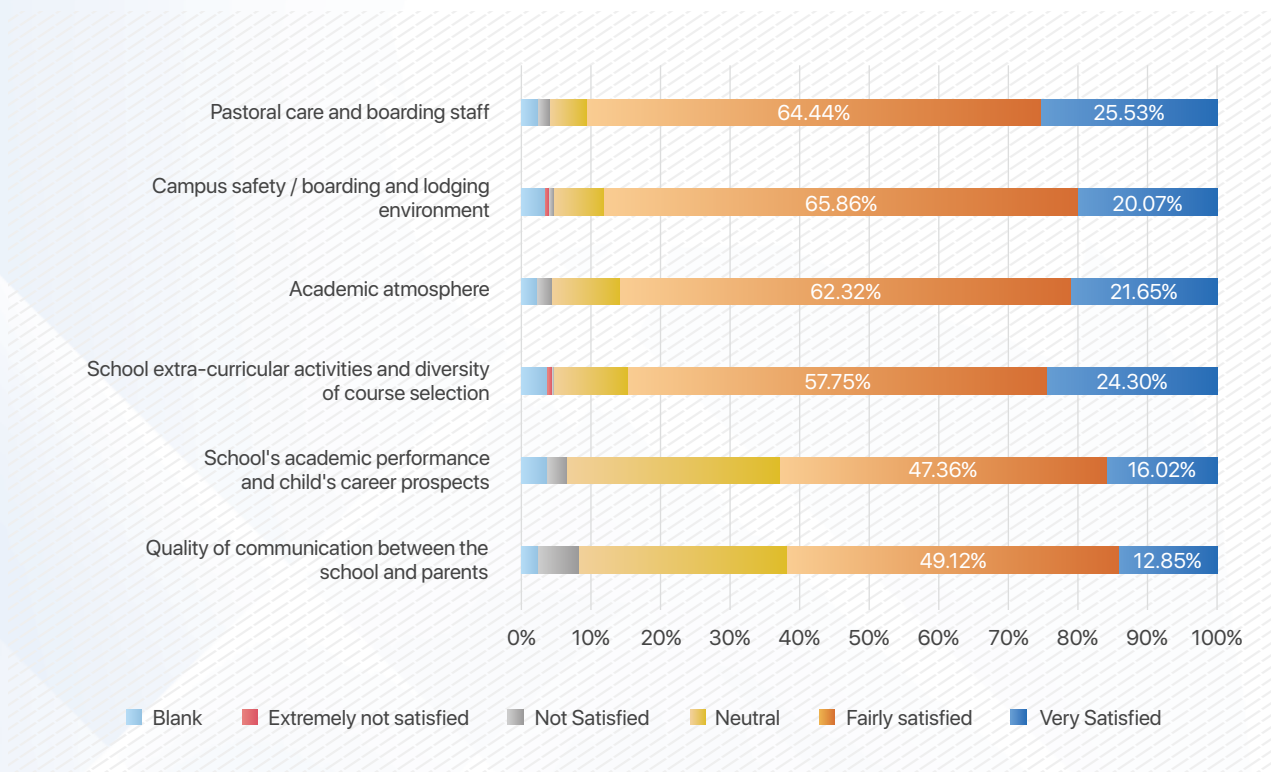


Chart 20: Current parents' satisfaction level

Two questions looked in greater detail at why parents were so satisfied with the performance of UK boarding schools during the COVID pandemic (the percentage of very satisfied and fairly satisfied totalled 90%). This is a remarkable statistic, given the extreme difficulties schools, parents and students faced.

Going forward, even though 38% (please refer to chart 17) of parents think the UK is back to normal, only 17% feel comfortable for schools to drop all the COVID measures. This uncertainty and concern may be caused by the domestic COVID situation and a lack of understanding of the true COVID situation outside China.

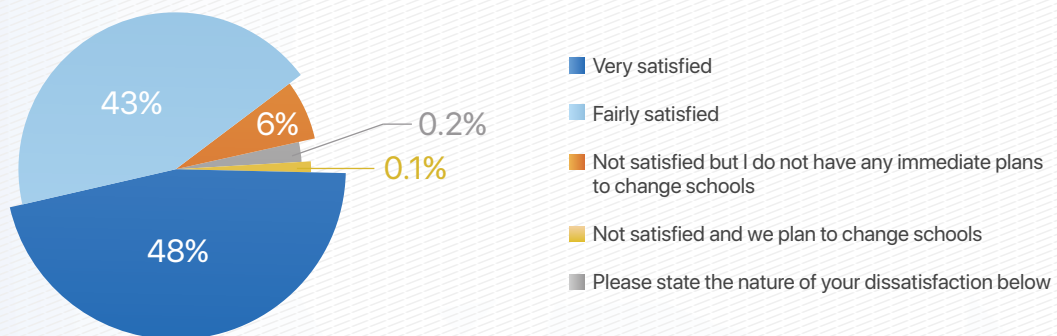


Chart 21: The performance of UK boarding schools during Covid - Current parents

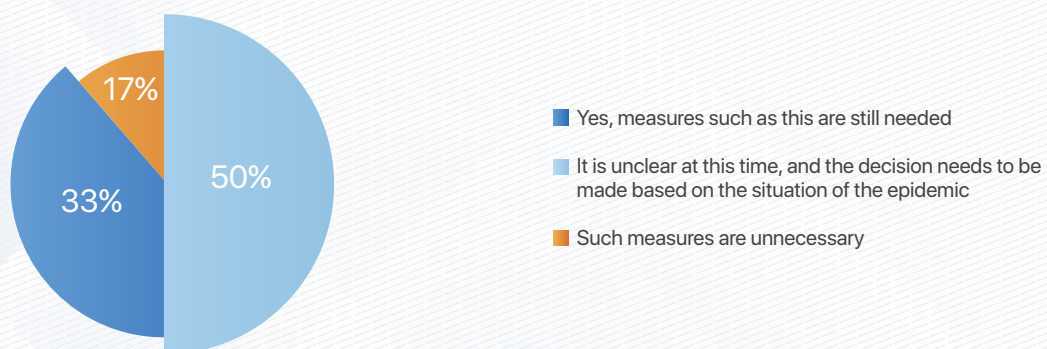


Chart 22: COVID control measures expected by current parents in the new term

Questions to consider

- Should schools consider working more closely with agents to bridge the language and cultural gaps and establish better channels of communication?
- Are schools willing to take further steps towards working more closely with guardianship organisations, in order to benefit both the students and schools?

Improvement of the study experience

1. Improving the study experience – prospective parental views

The survey asked an open-ended question to all prospective parents to understand the improvements that the school may need. The question is: If schools could offer one thing to improve and support your preparations for studying abroad, what would this be?

The improvements asked for by parents may be summarised as follows:

- Parents wanted more information about the type of student that a school is looking for and more information about school on its website so that the parents could understand and find the best match for their child.
- Parents wanted more information about a school's teaching quality, league table performance and leavers' university destinations.
- More information about a school's pastoral care and mental health support for the students would be valuable.
- Application, enrolment and entrance exam information is not always easy to find. Some flexibility on entrance deadlines would be helpful, especially the requirement to register 2-3 years in advance. This flexibility request reflects that Chinese parents in general do not plan as far ahead as UK parents do. It is due partly to a cultural difference, but also a lack of understanding of the UK independent education system.
- Parents also asked for more interaction and language support during the application stage.
- Reputable agencies provide a good bridge to overcome the cultural and linguistic gaps which exist. Agencies are well positioned to support schools with their requests.
- Agents which offer guardianship may be highly valued by prospective parents due to their increased focus on students' pastoral care, mental health support and ongoing language support during application and while studying in the UK.

2. One change schools might make to improve further - Current parental views

This was a new open-ended question which elicited a wide range of views which have not been quantified to any great extent.

When their child is studying in a UK boarding school, some parents wish the school could improve in the following areas:

- Academic quality (this was the most mentioned area)
- Surprisingly over 20% of answers mentioned improvement in the food quality in terms of variety and quantity.
- The next most frequent request was for regular updates and interaction with parents about the school. Some would like daily updates about their child.
- Closer working relationships with reputable guardianship organisations might help significantly in providing helpful feedback.
- Some practical suggestions were made in order to make international students' lives easier, such as temporary onsite storage to host the student's belongings during the long holidays.



The Importance of Guardianship

1. The parents' increased awareness of Guardianship

Guardianship is a key area where prospective parents need advice and support.

This year's survey indicates that there is increasing awareness of the responsibilities and functions of a guardianship agency amongst prospective parents, up from 23.6% to 53.8%. The percentage of prospective parents who understood something about guardianship also increased from last year's figures, whilst those who had heard about but not known much reduced from last year's 60% to 36.5%. The shift from "heard about only" to "some good understanding", confirms that prospective parents' are increasingly aware of the importance of guardianship. The ratio of current parents is very similar to last year's and is another proof of the growing awareness of prospective Chinese parents.

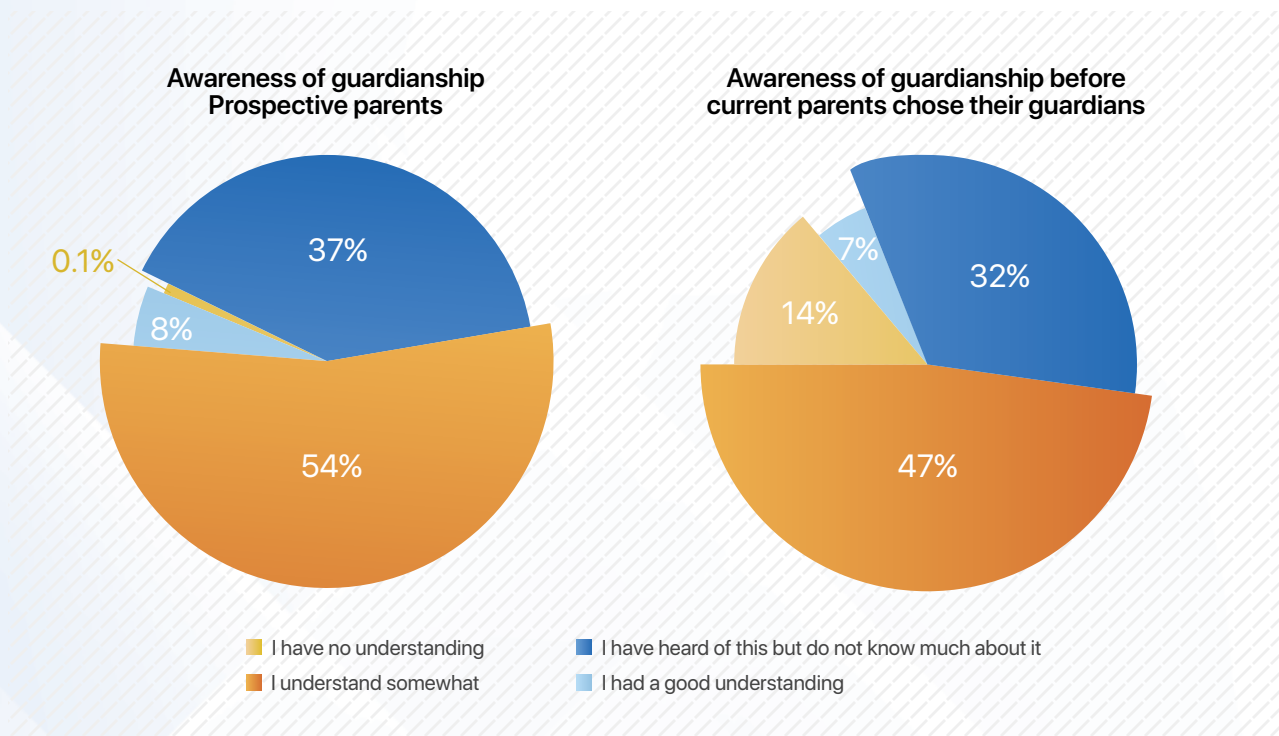


Chart 23: Awareness of Guardianship

2. How parents choose a guardianship agency

Of primary importance to parents when selecting a guardianship agency, was assurance around the certification of a guardian or guardianship agency through AEGIS or BSA (74%). The second most important function amongst prospective parents was its ability to give guidance for future university entrance exams (53%) whilst the third was solid arrangements for exeat and holiday periods (41%). The Agency's ability to understand the cultures of both countries and their ability to communicate bilingually was a significant priority amongst 40% of prospective parents.

Regular feedback and student guidance from guardians only attracted 26% support from prospective parents and this area may need further messaging. As with last year, the cost of guardianship services was the last concern for the parents though this does not imply that all parents are in the top income brackets.

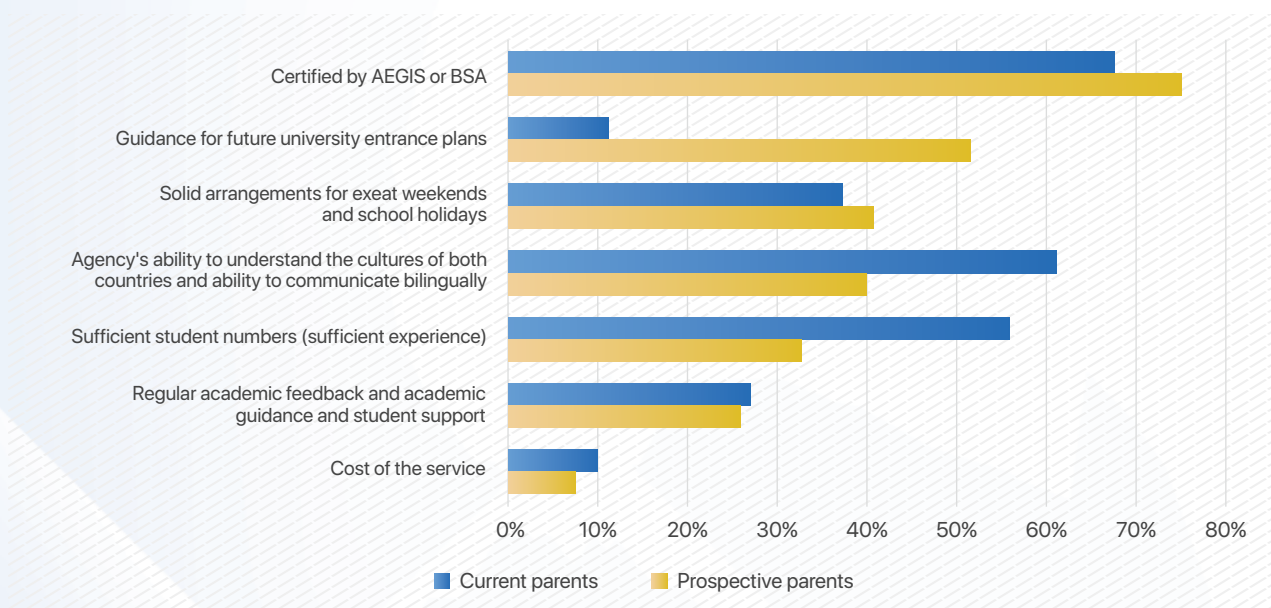


Chart 24: Important factors for choosing guardians

If we contrast these statistics with those obtained from current parents, we find that the guardianship organisation's ability to understand both Chinese and English culture, and the ability to communicate bilingually rose to second place, whilst sufficient student numbers and experience rose to third place. This shows that prospective parents had previously taken a very simplistic view of the cultural differences and communication with boarding schools. After their experience with small-scale guardianship organisations or individual services, parents had encountered some difficulties and identified some potential problems. The prospective parents and schools should be aware of this and take extra care, when choosing a guardian to work with.

Questions to consider

- How far do schools, agents and other sector organisations help to educate parents on their understanding of UK guardianship, its responsibilities and the expertise/support required?
- How often do schools communicate with guardians and international parents before and after the student's entry?
- What are the credentials for guardianship? Does the school have a guardianship code of practice?
- Schools may need to review their policies over exeat and holiday arrangements for international boarders, particularly during times of difficulty with travel restrictions.
- Combining increased parental awareness with the new National Minimum Standards might suggest that schools should be establishing a much closer working relationship with certified guardianship organisations.
- Cultural understanding within China is always very important, and schools may wish to consider working with dedicated guardianship organisations specialising in the country's different regions. This would better cater for the needs of students and parents from those specific regions.

3. Levels of knowledge and satisfaction with guardianship agencies

Chinese parents rely heavily on their guardian's knowledge and expertise to attend parent evenings, discuss students' A level subject choices, university and course selection, as well as helping students to improve their academic levels.

Parental satisfaction with their guardianship agency performance was generally strong with 94% (as opposed to 80% last year) saying they were fairly or very satisfied. Indeed, the order of importance and percentages are largely similar to last year's.

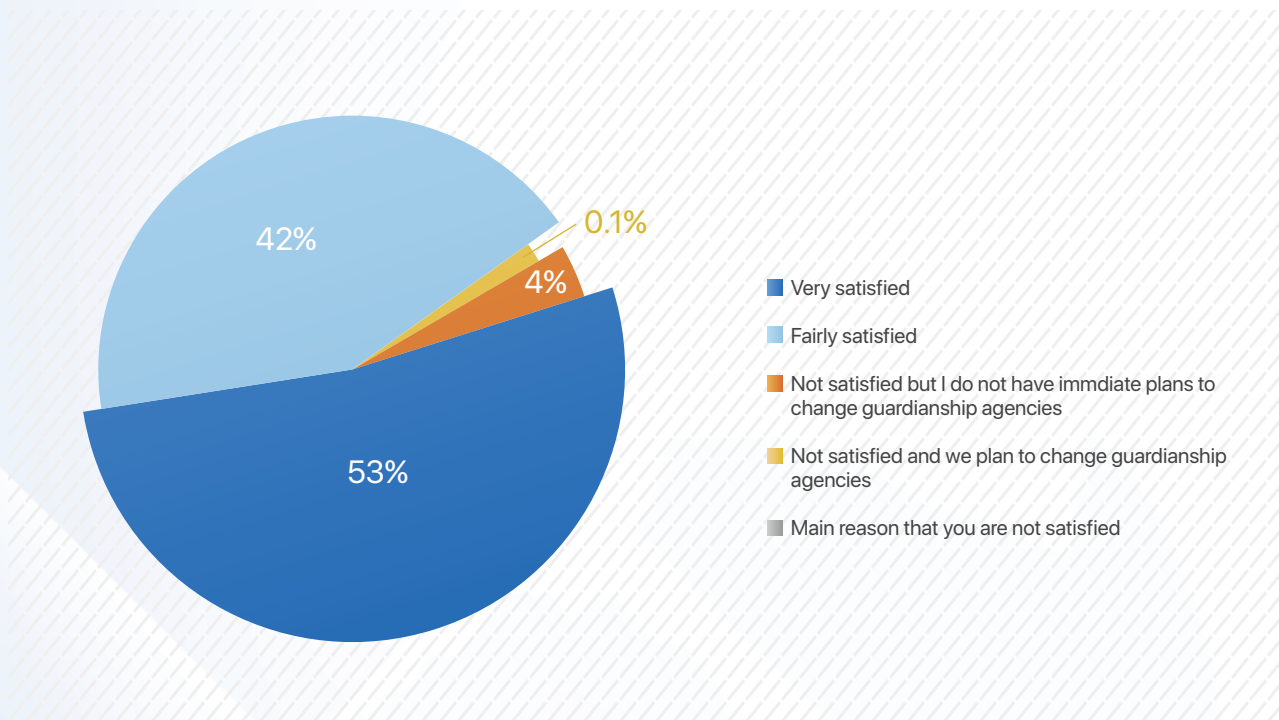


Chart 25: Level of satisfaction with guardianship agency

Clearly the ability to deal with emergency situations was top with 90% (79% in 2021). In second place was assistance with effective communication between the school and parents 51% (48% in 2021). Availability and ease of contact at any time was third with 45% (44% in 2021).

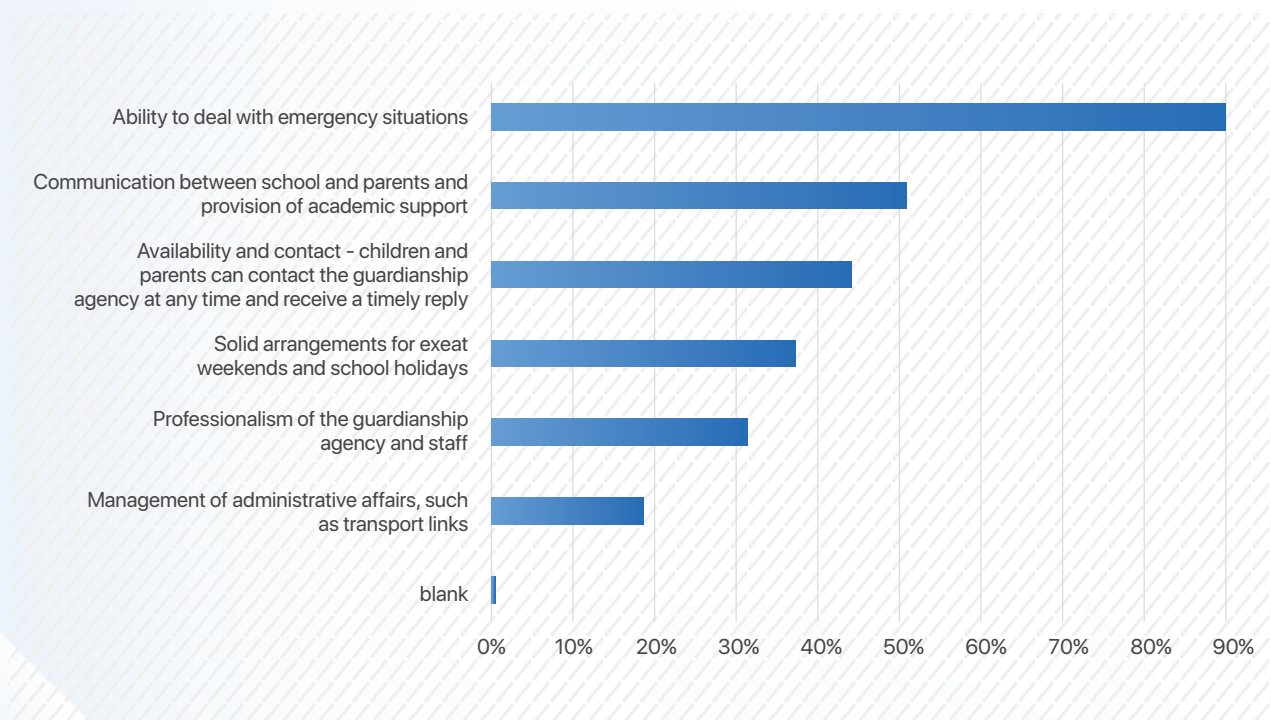


Chart 26: Most valuable guardianship services - current parents

However, according to the survey's open-ended question, academic support and future academic and career planning was the most requested improvement from current parents to their guardians (40% of response received). This demonstrates the important role guardians play in supporting students' academic achievement.

Questions to consider

- How far should schools be monitoring the performance of guardians and what should they do if students are unhappy? Schools need to consider the new NMS with regard to this.
- How far should schools try to educate guardians?
- How can schools make sure that parents feel sufficiently involved in their child's education?
- Schools may wish to review how they have dealt with a variety of emergency situations in the past.

The level of income earned by parents who responded to the survey

The survey attempts to gauge the level of income earned by those who responded to the survey.

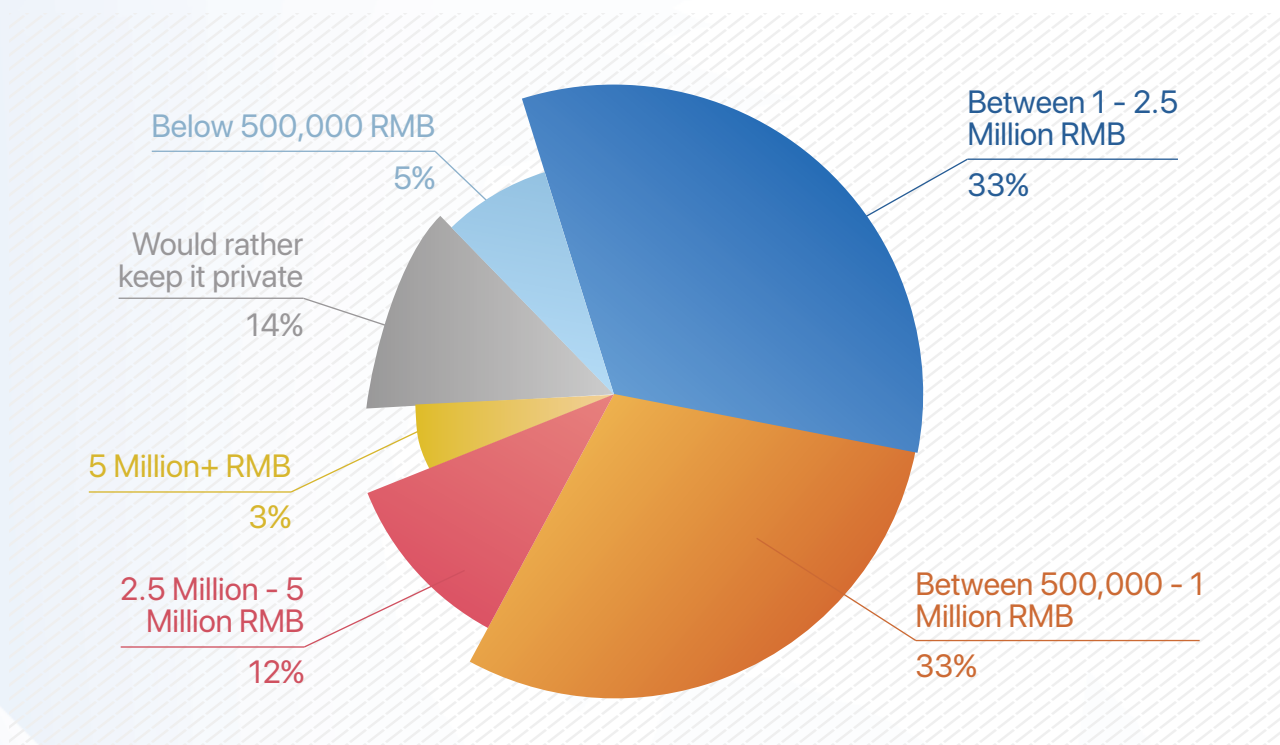


Chart 27: Family Income Level

Exchange rate as of Sept: £1 : 8.20 RMB

The combination is almost identical to the last year’s survey. Nearly 85% of the parents who responded to the questionnaire identified their income as being above 500,000 RMB (£61K) per year, which is, at the minimum, 10 times the average per capita income of just under 50,000 RMB and the number of parents who reported their income as more than 1 Million RMB (£122K) accounted for over 50% of our respondents. This suggests that parents who could afford to send their children to study overseas are in the minority and only take up a small portion of the pyramid. The trend of strong yearly growth of per capita disposable income of urban households in China and recent pound weakening against RMB (10% since the last year’s survey) also suggests potential for further expansion in the future.

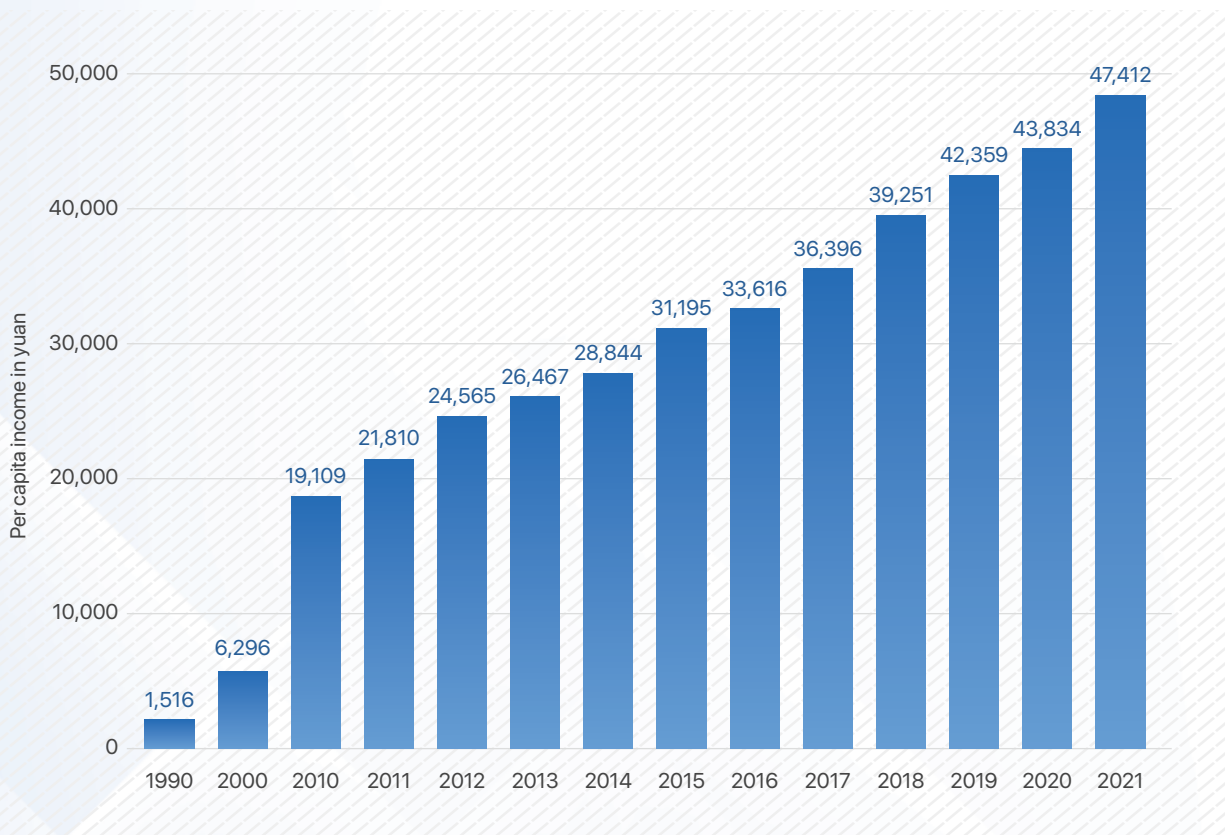


Chart 28: Per capita income in China (1990 - 2021)

Annual per capita disposable income of urban households in China from 1990 to 2020 (in yuan)
 Source: <https://www.statista.com/statistics/278698/annual-per-capita-income-of-households-in-china/>



Conclusions and recommendations

The positive contribution made by Chinese students within UK boarding schools has become a notable feature of these schools in recent years. It is good to know that this positive relationship goes two ways and to read the opinions of 1,100 mainland Chinese parents who have made the huge commitment to send their children to school in the UK.

It is clear that the UK boarding sector remains highly regarded and, despite the difficulties of the last few years, parents greatly appreciate the high levels of professionalism and care shown to their children. Here are a few conclusions from the survey results which back this up:

- The UK boarding sector has responded very well to the challenges presented by COVID
- There are high levels of parental satisfaction from amongst those already in the system
- Confidence is returning for those considering entry to the UK boarding sector
- Many schools have adapted well to challenging times with online learning when required
- There is no substitute for traditional face to face learning within a community
- Parents are still prepared to make great sacrifices to enable their children to get the best chances in life
- UK boarding schools are recognised as world leaders in education

It is also clear that UK schools are increasingly responsive to the potential of international students, who are valued for all they bring to the cultural enrichment of their schools as well as their academic and extra-curricular achievements. However, schools are always looking to improve their offer to international students and equally, whilst Chinese parents are prepared to make great sacrifices to enable their children to receive a top quality education, they also look to schools to understand their needs and the anxieties of their children.

With this in mind, we have pulled out a few recommendations for schools to consider:

- Schools should adapt their systems further to take account of student, parental and guardianship needs
- Schools should consider how to improve international students' experience of boarding and pastoral care, especially with regard to the variety and quantity of food provided, accommodation and care of homesickness
- Regular clear communication with parents and guardians and agents is essential
- Chinese parents are generally keen to see the highest academic standards as well as a broad and balanced curriculum
- Parents would like more information about appropriate University options for their children

Particularly in the light of recent changes to the National Minimum Standards, guardians have a vital part to play in enabling Chinese students to adapt and flourish. Schools need to establish excellent relationships with guardians and be satisfied that they are fulfilling their obligations to the children in their care. Likewise schools on the UKVI register of student sponsors must be sure that they are fulfilling their duties:

- All schools are different. Finding the right school for each individual student is vital
- Finding a good agent is important for many Chinese families. Parents need to check they are fully trained and equipped to offer their services and schools need to do proper due diligence on the agents they work with, for example by using BSA certified agents
- Guardianship is a key element of successful boarding in a UK school and schools need to know that their pupils' guardians are caring and professional, for example by ensuring that they are BSA certified
- The development of warm, open understanding partnerships between schools, students, parents, agents and guardians is vital for all concerned going forward.



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