



Spanning the Globe:

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



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

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[The International School Consultancy](#)

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Spanning the Globe

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

Welcome to *EdWeek Market Brief*

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PK-12 Insights for Business & School Leaders

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Data Insights



What District and School Leaders Really Want From Personalized Learning

An exclusive Education Week Research Center analysis of Digital Promise interviews with district and school leaders reveals their priorities around digitally driven personalized

Market Intel



'Next Gen' Science Standards Prompting Content Providers to Adjust

The Next Generation Science Standards are placing new demands on content producers to recast their classroom resources, and rethink the PD they offer.

[Continue >](#)

'Negotiated Rulemaking' on ESSA Tackles Computer-Adaptive, ELL-Focused Testing

Bridging the Information Divide Between Companies and Schools Is a Struggle

'A Threat and an Opportunity' for Testing Companies

Marketplace K-12

FREE

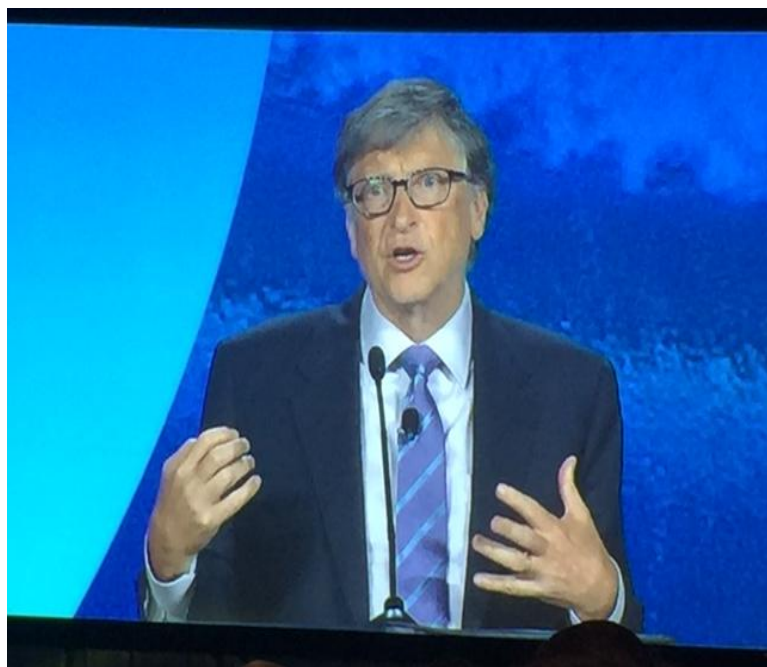
Online Testing in Georgia Disrupted by Glitches

Statewide testing in Georgia has been riddled with problems, including lack of Web connectivity and a temporary inability to save students' answers.

[Continue >](#)

ACT Adds 'Open' Education Provider to Its Portfolio

Growth in the U.S. Ed-Tech Marketplace



K-12 Digital Instructional Materials Market

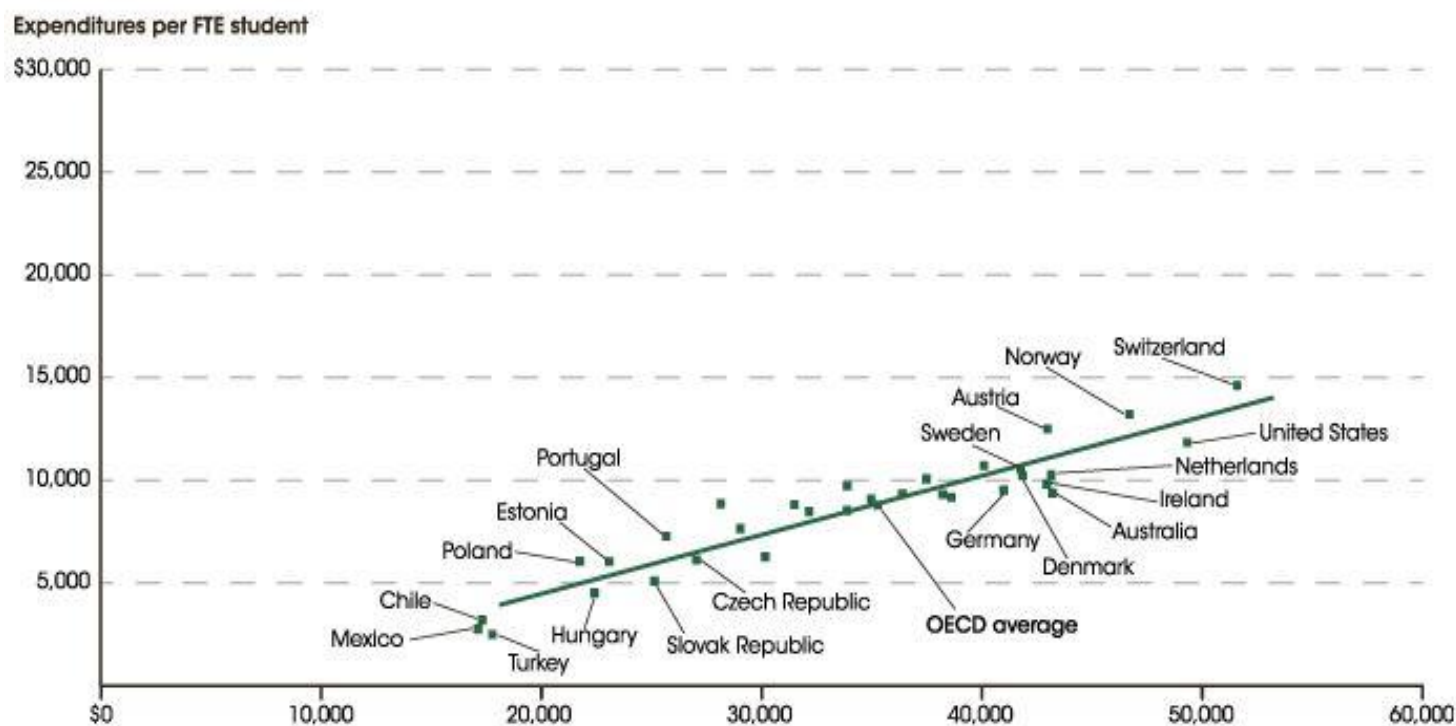
50% growth projected

An increase of \$1.1 billion from 2015-2020

-- Bill Gates

Source: GSV

U.S. Per-Student Expenditures



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



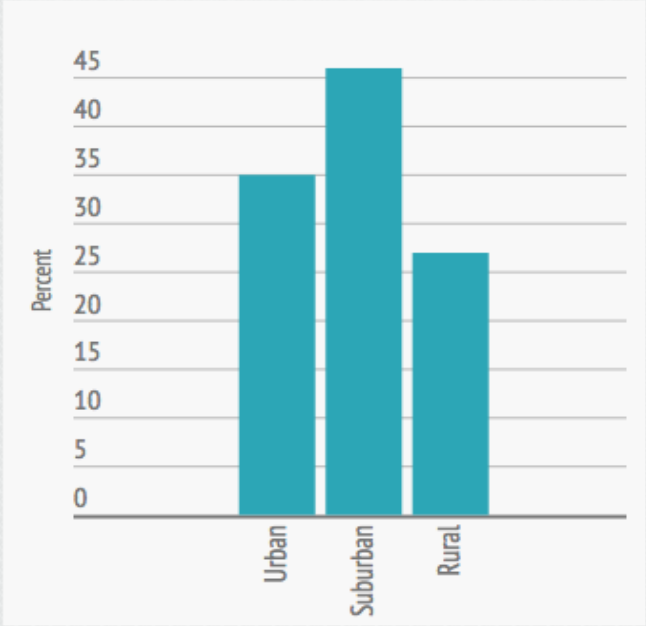


*K-12 officials want
“personalized”
technologies that act as
communication tools,
not just models for
tailoring academic
lessons*

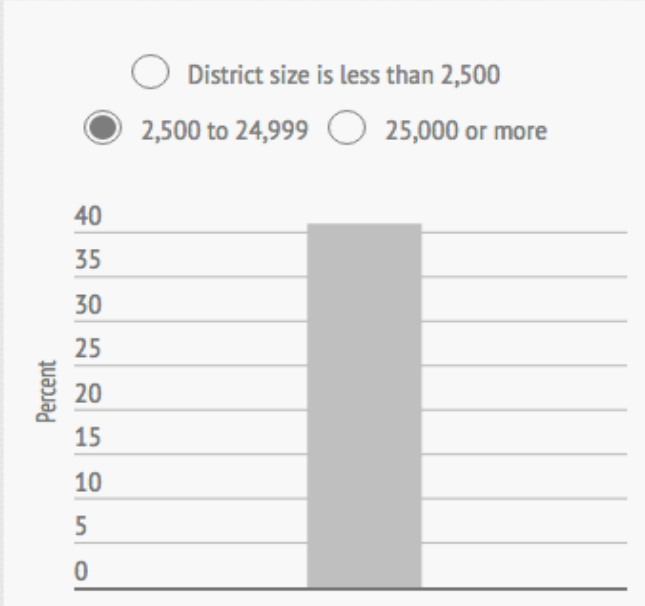
Where Demand for ELL Digital Content is Highest

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

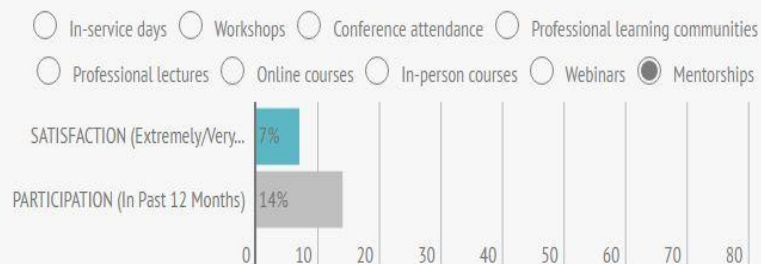


SOURCE: Education Week Research Center survey of more than 400 school and district leaders who are registered users of edweek.org.

What Works Best for Professional Development?

Teacher Professional Development: In-Service Days Still Dominate

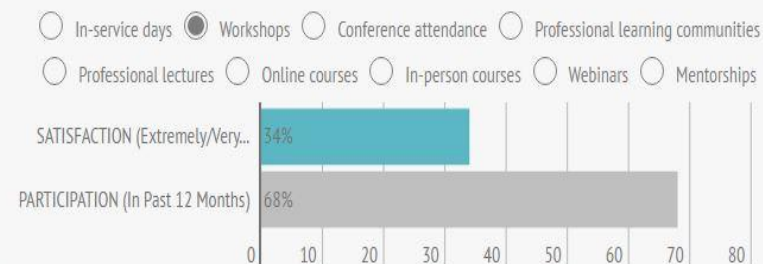
In-service days, which are often required by districts, are by far the most common form of PD teachers receive. Workshops and conferences are less prevalent -- but are relatively popular among educators.



SOURCE: 2015 Grunwald Associates LLC

Teacher Professional Development: In-Service Days Still Dominate

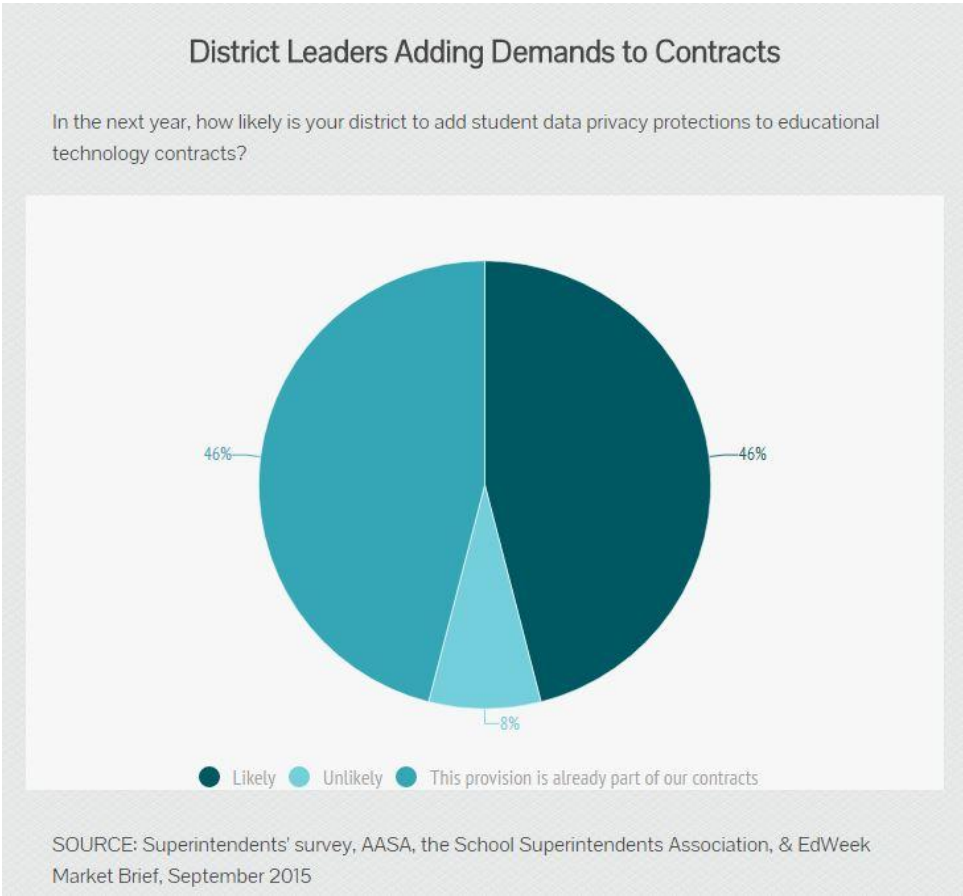
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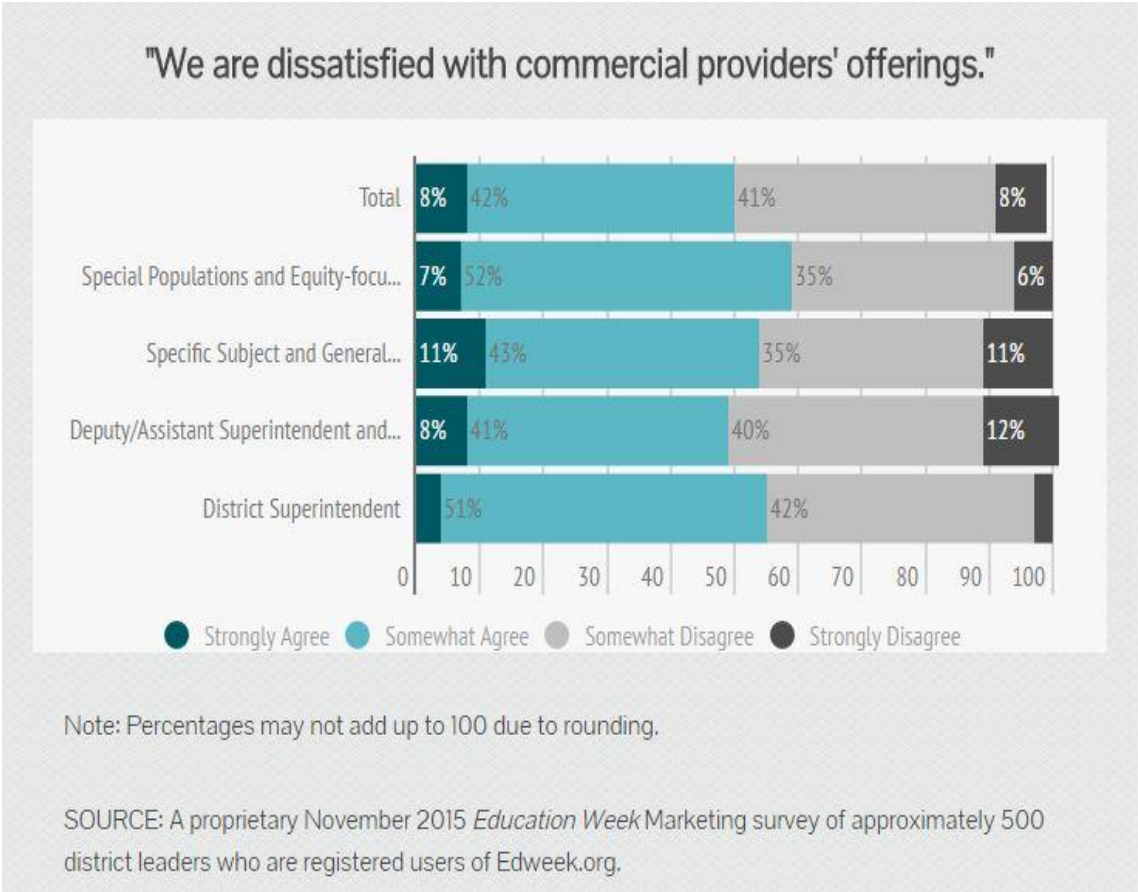
SOURCE: 2015 Grunwald Associates LLC

Threats in the U.S. Market

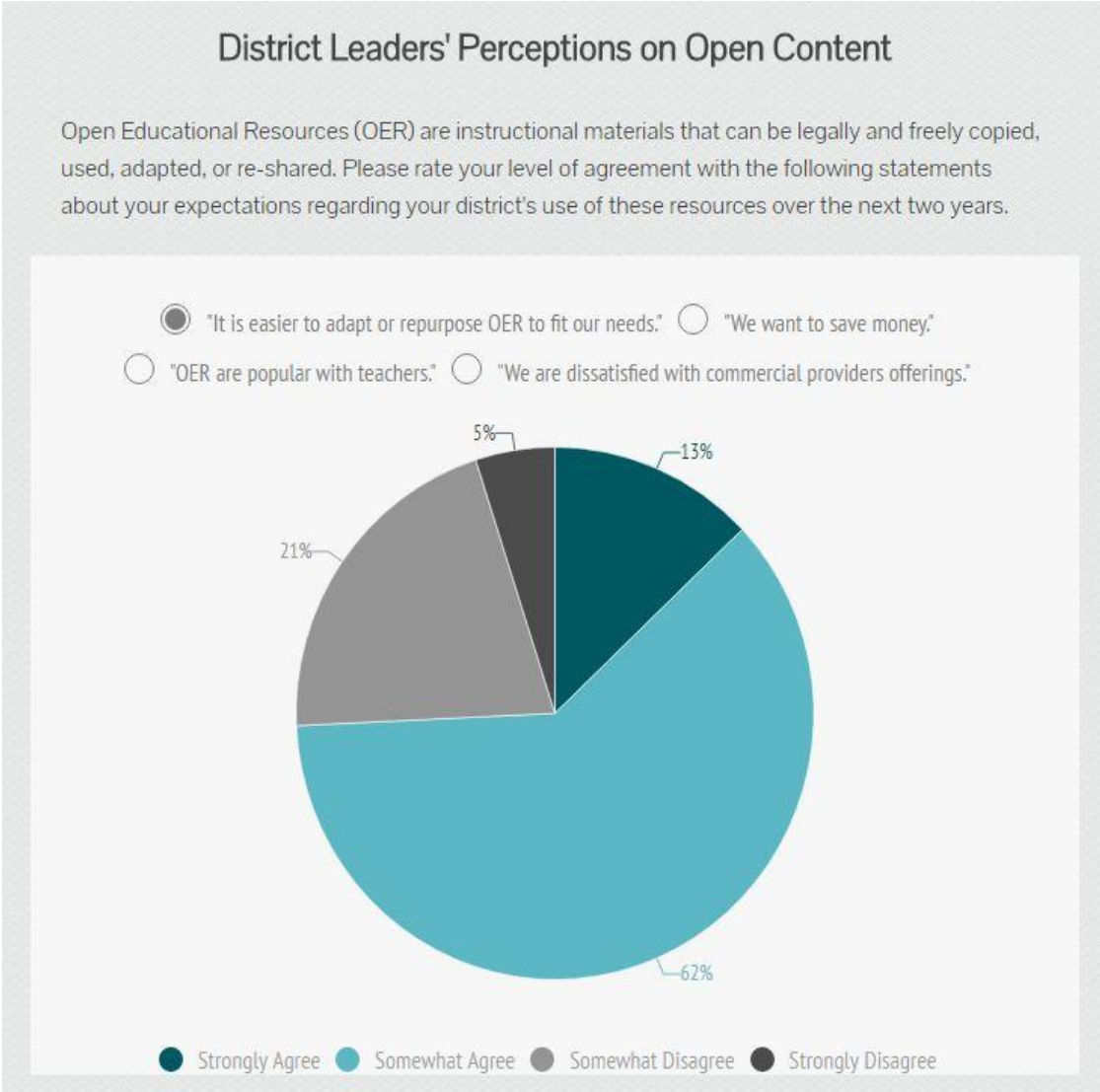
Data Privacy Expectations



Dissatisfaction With Current Offerings



Integrating Open Educational Resources



ESSA:

The Every Student Succeeds Act

Changes on the Horizon With New K-12 Law



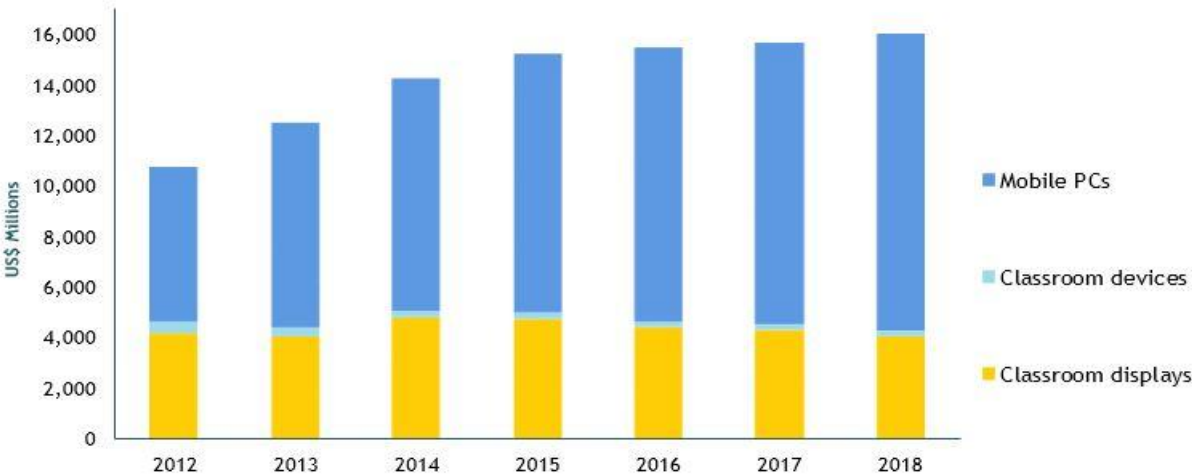
President Barack Obama, flanked by Senate Health, Education, Labor and Pension Committee Chairman Sen. Lamar Alexander, R-Tenn., left, and the committee's ranking member Sen. Patty Murray, D-Wash., signs the Every Student Succeeds Act last December.
Image credit: Evan Vucci-AP-File

Tracking International Trends

Globally, More Devices Than Ever Before

GLOBAL EDUCATION TECHNOLOGY SPEND - CATEGORY VALUE

Total 2015 Worldwide Spend On Education Hardware - US\$ 15.2 billion



- | 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

EDWEEK
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MARKET INTELK-12 INSIDERDATA INSIGHTSMORE ▾

Analyst's ViewMarch 31, 2016

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

TODAY'S OUTCOMES

- 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

OR

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.

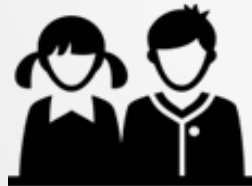
Data used in this presentation is accurate as at 15th February 2016

GLOBAL ENGLISH-MEDIUM EDUCATION MARKET



Schools

2000: 2,584
2016: 8,231



Students

2000: <1m
2016: 4.37m



Staff

2000: 90,000
2016: 402,000



Fee Income

2000: \$4.9b
2016: \$39b

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

MARKET DEMOGRAPHICS

- 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)

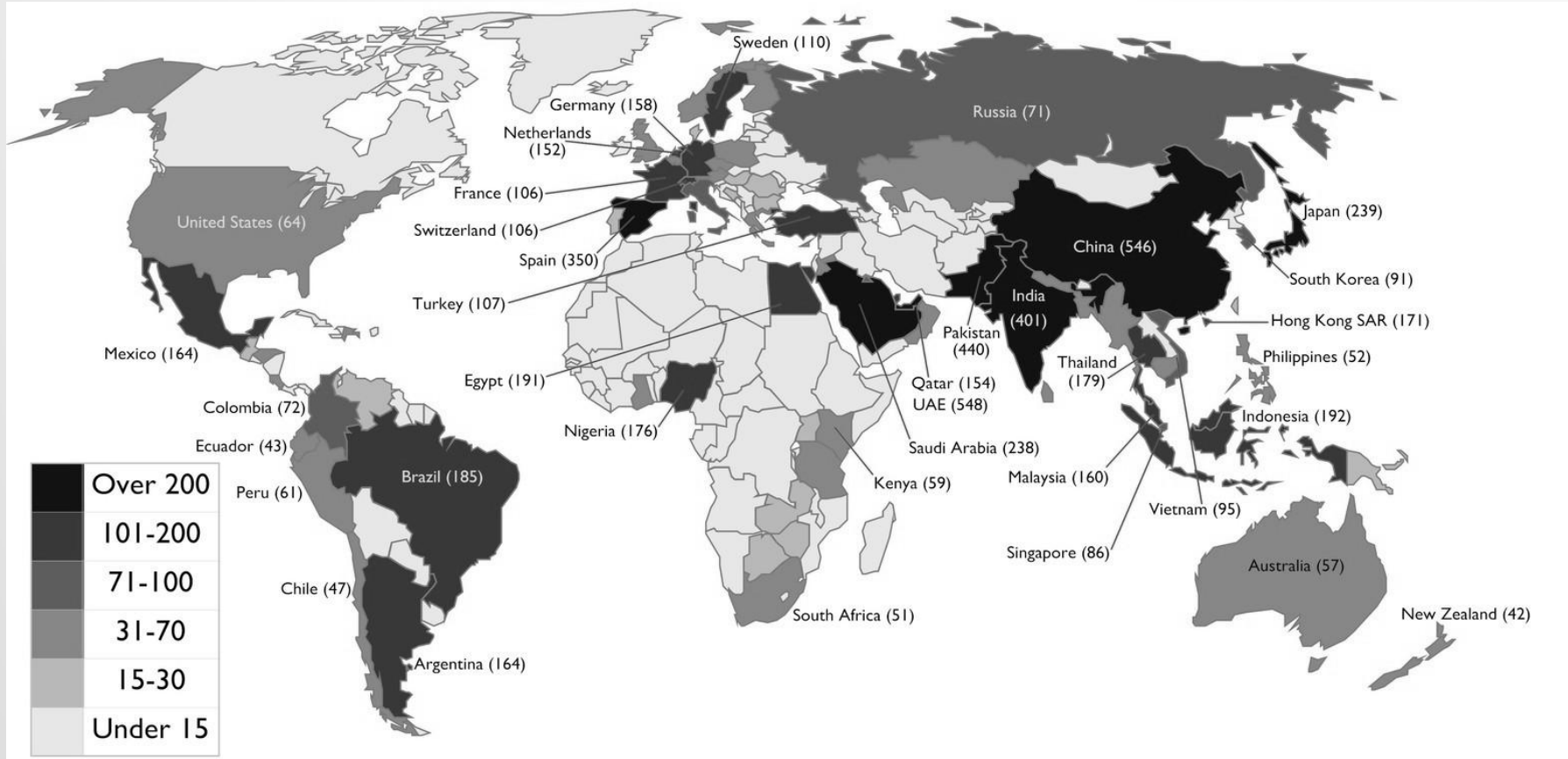
QUALITY STANDARDS

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

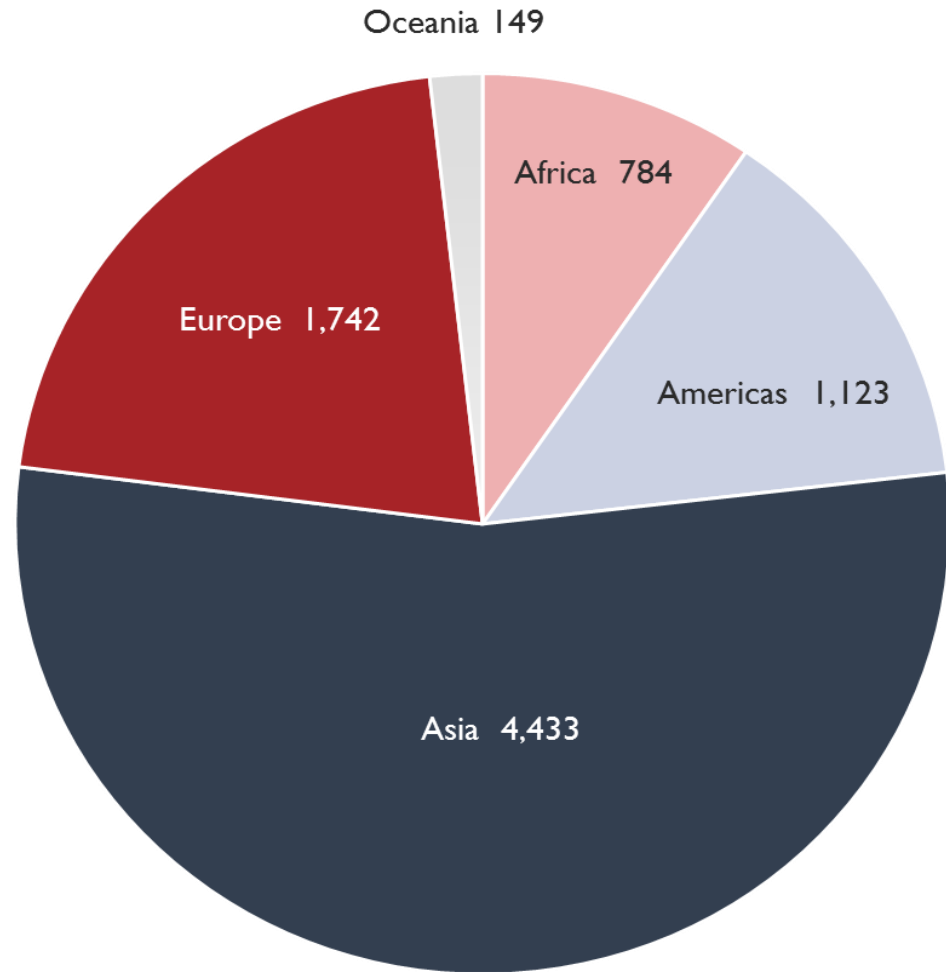
A HEALTHY MARKET

- 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

GLOBAL DISTRIBUTION OF INTERNATIONAL SCHOOLS

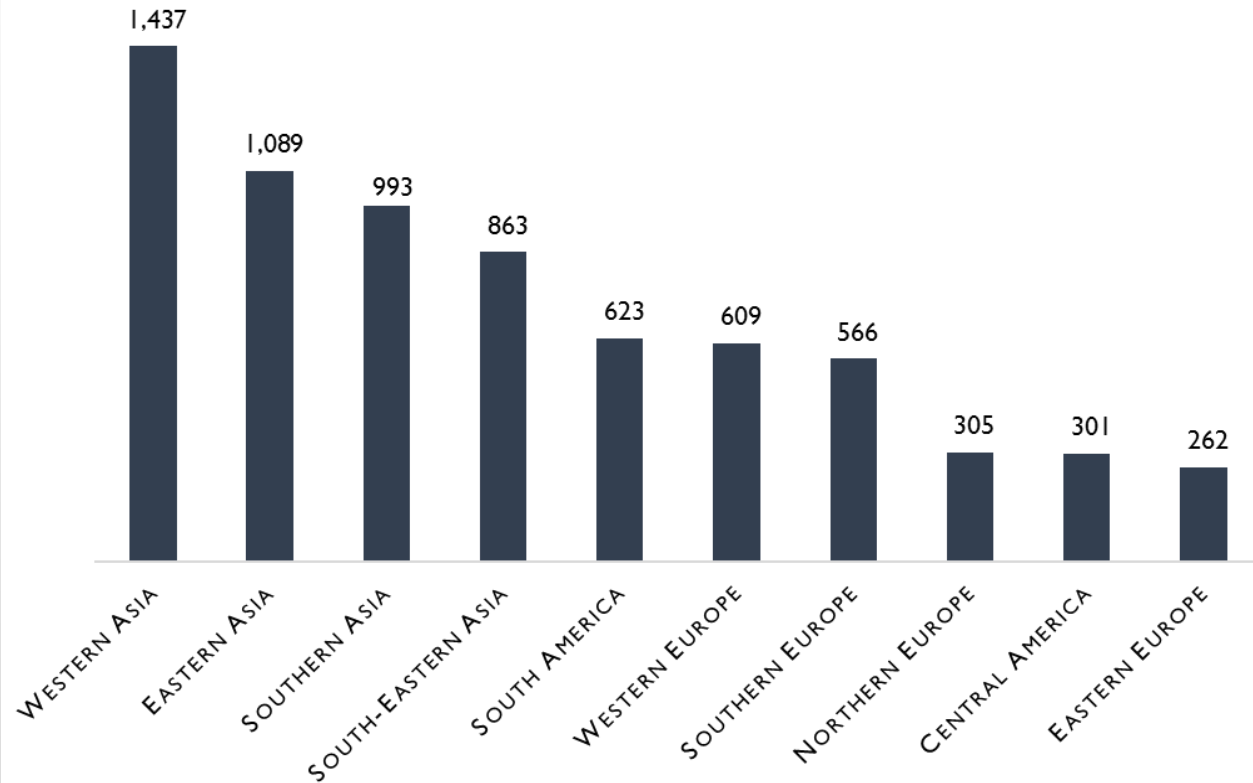


SCHOOLS BY REGION



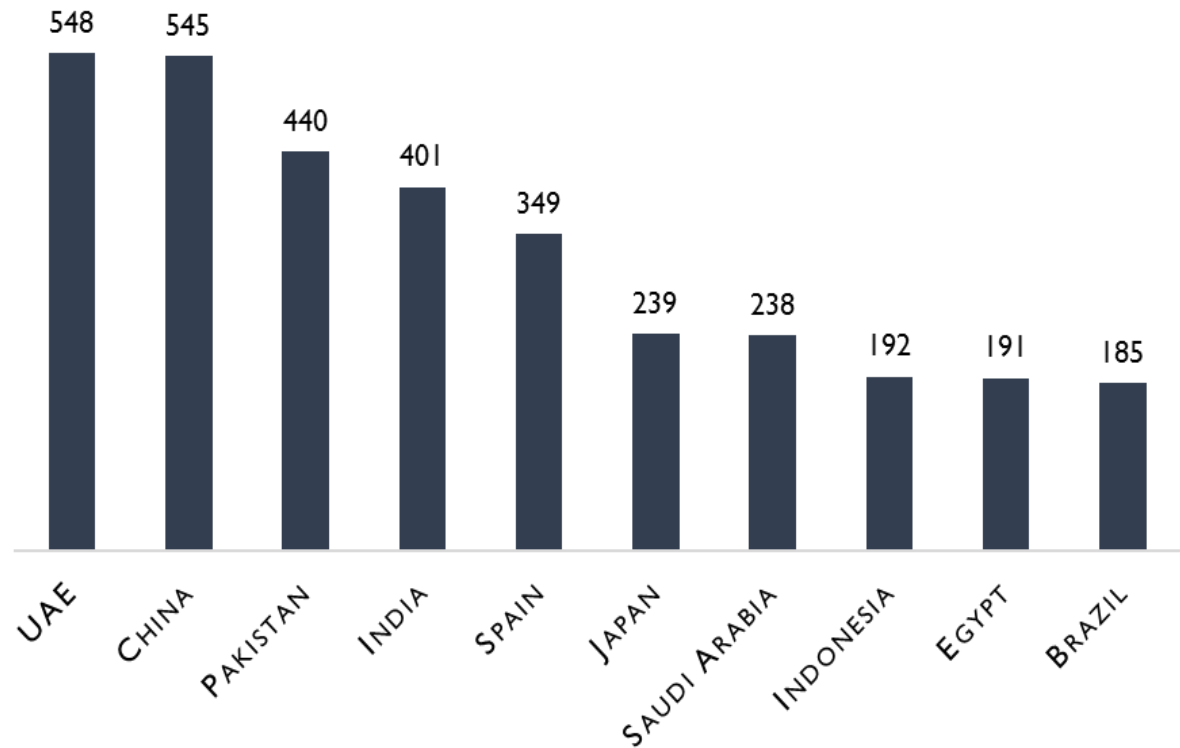
SCHOOLS BY SUB-REGION

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



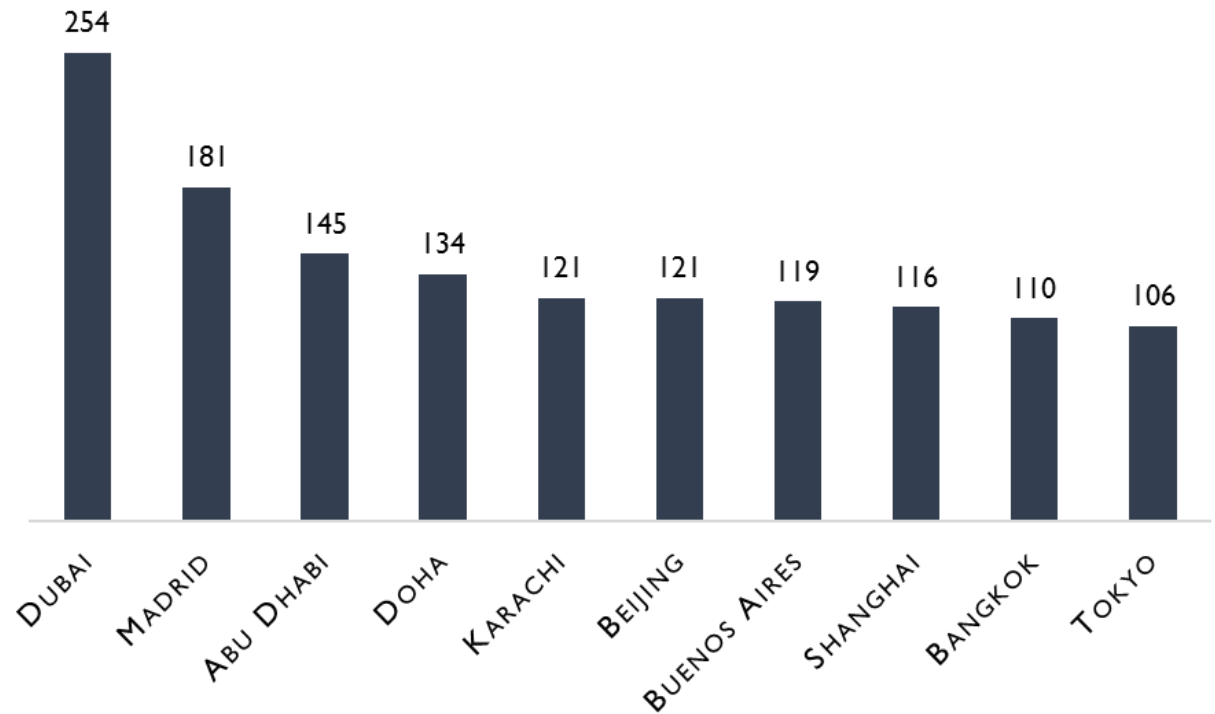
SCHOOLS BY COUNTRY

Top 10 countries by
count of schools.



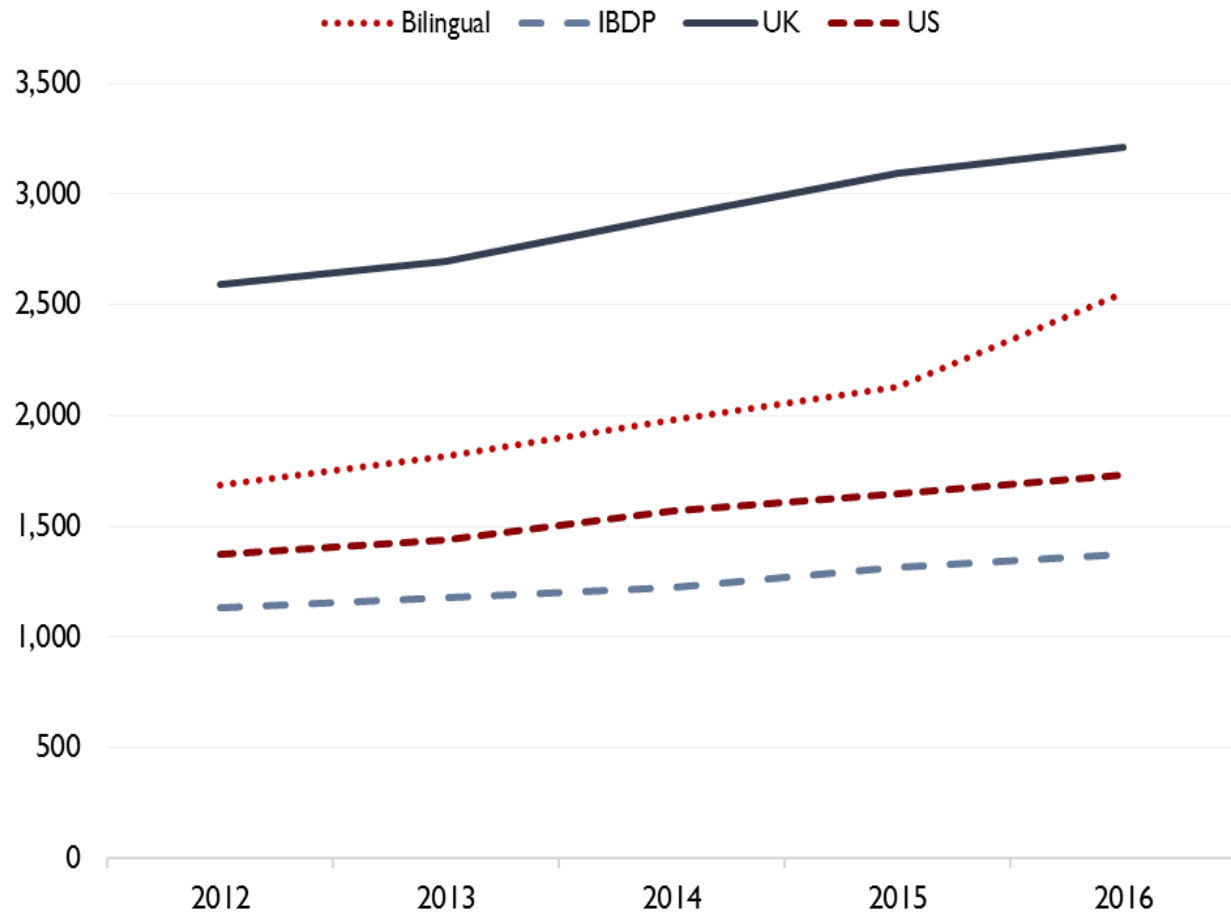
SCHOOLS BY CITY

Top 10 cities by count
of schools



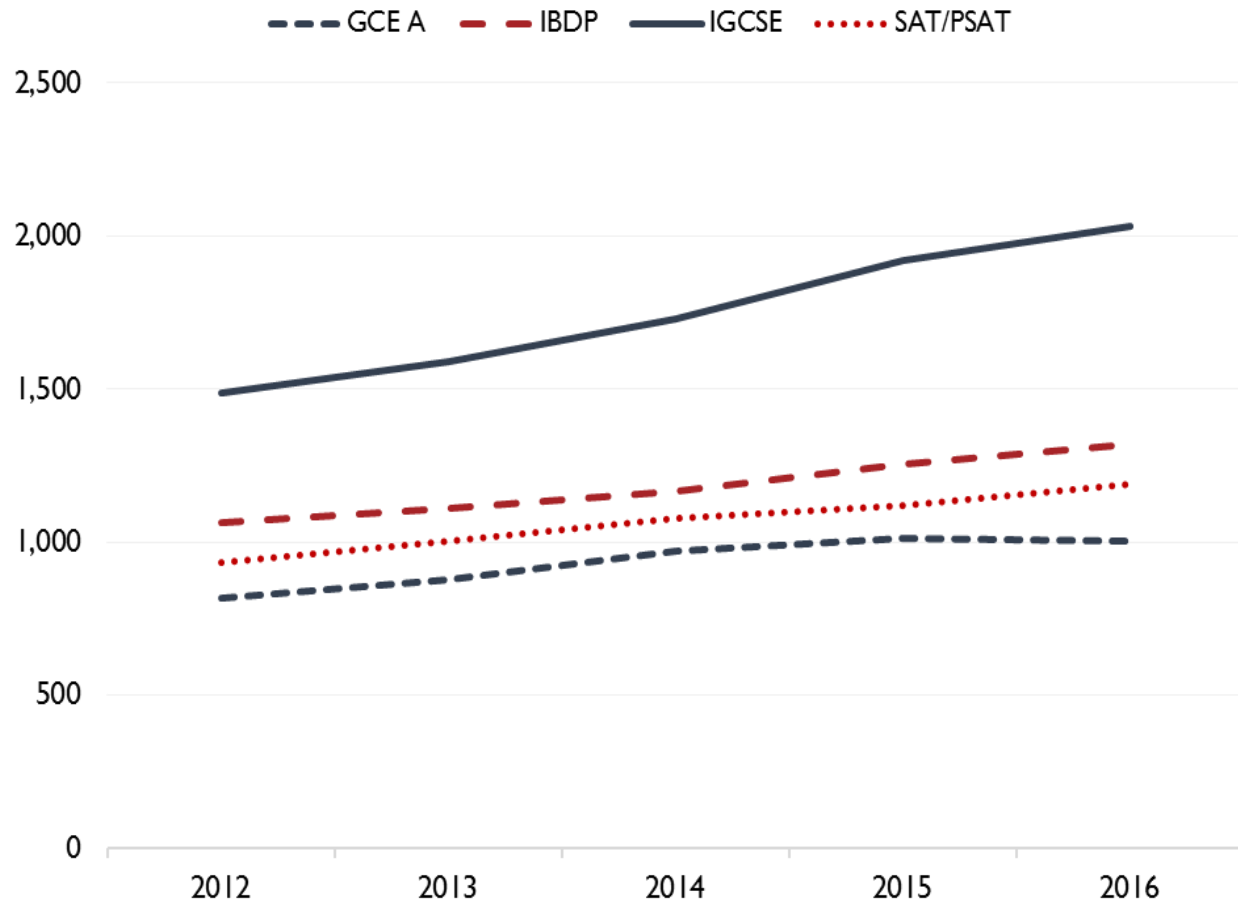
CURRICULUM TRENDS

Number of schools
offering the major
international curricula.

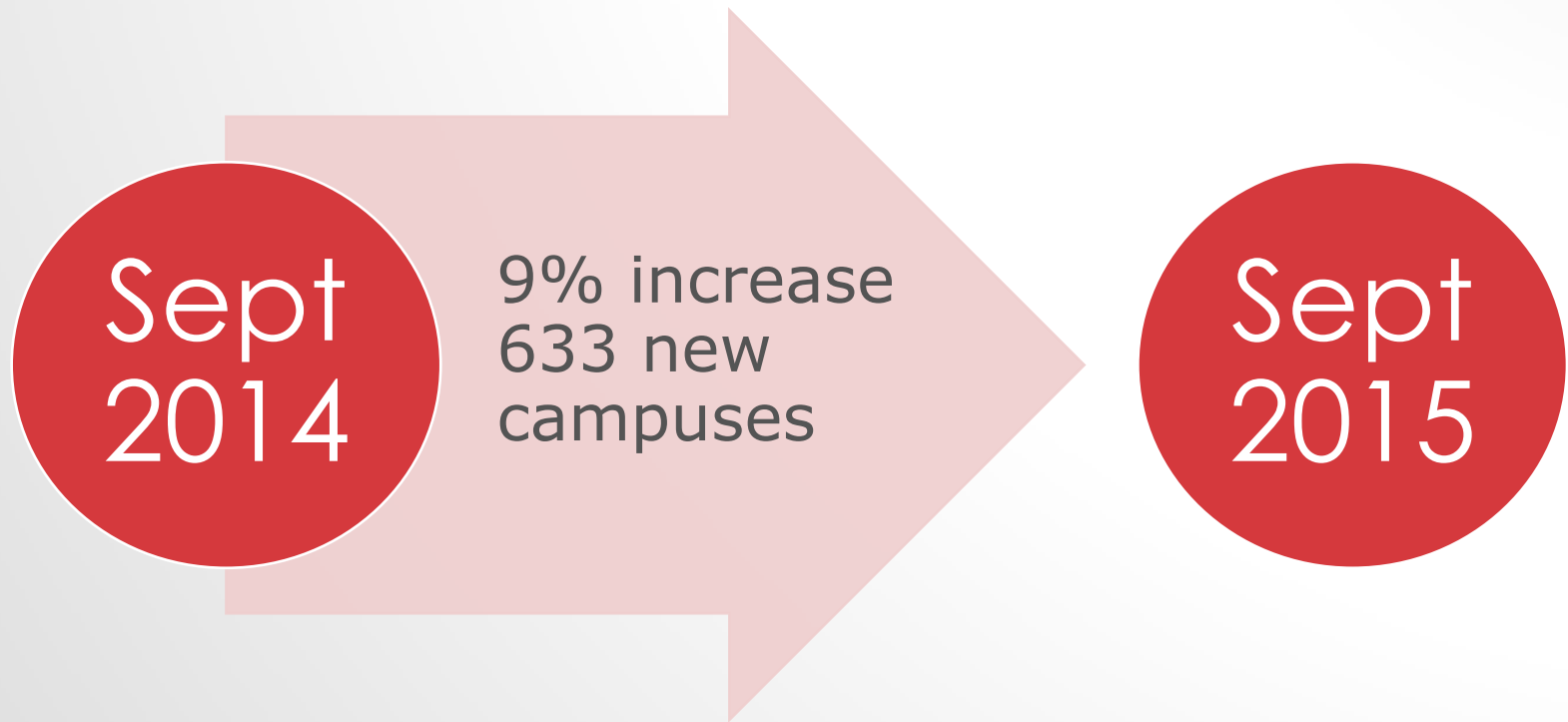


EXAMINATION TRENDS

Growth trends
January 2012 – January 2016

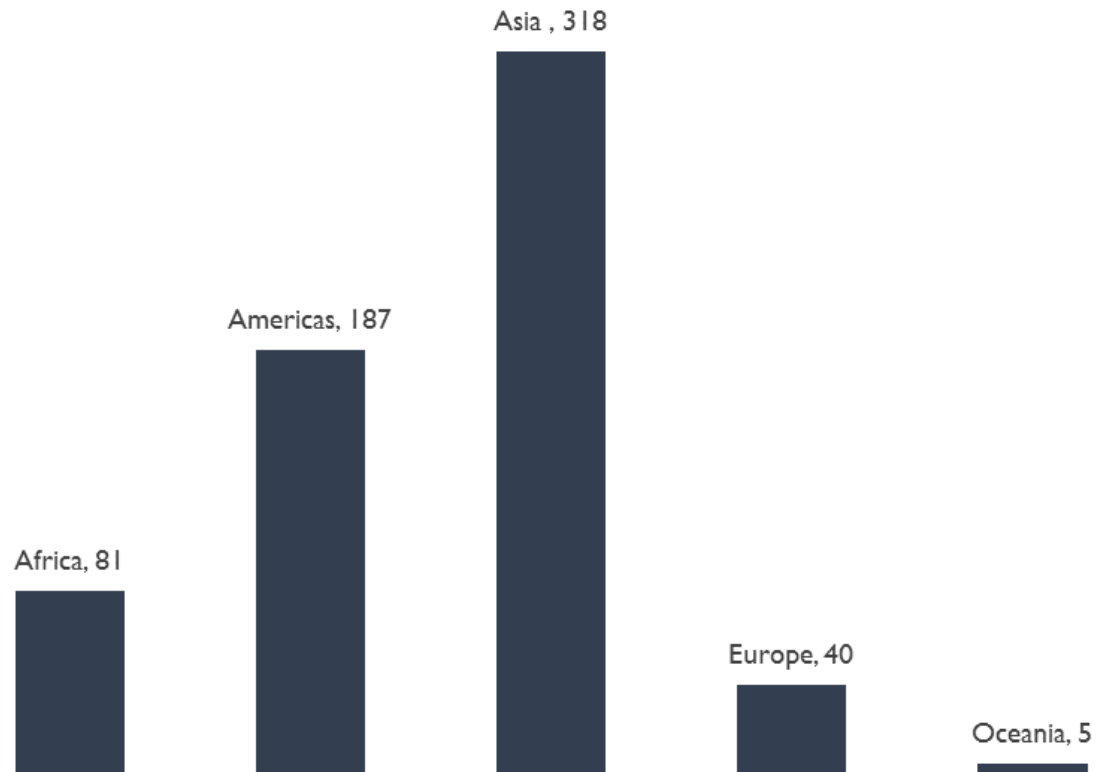


GLOBAL GROWTH TO SEPTEMBER 2015



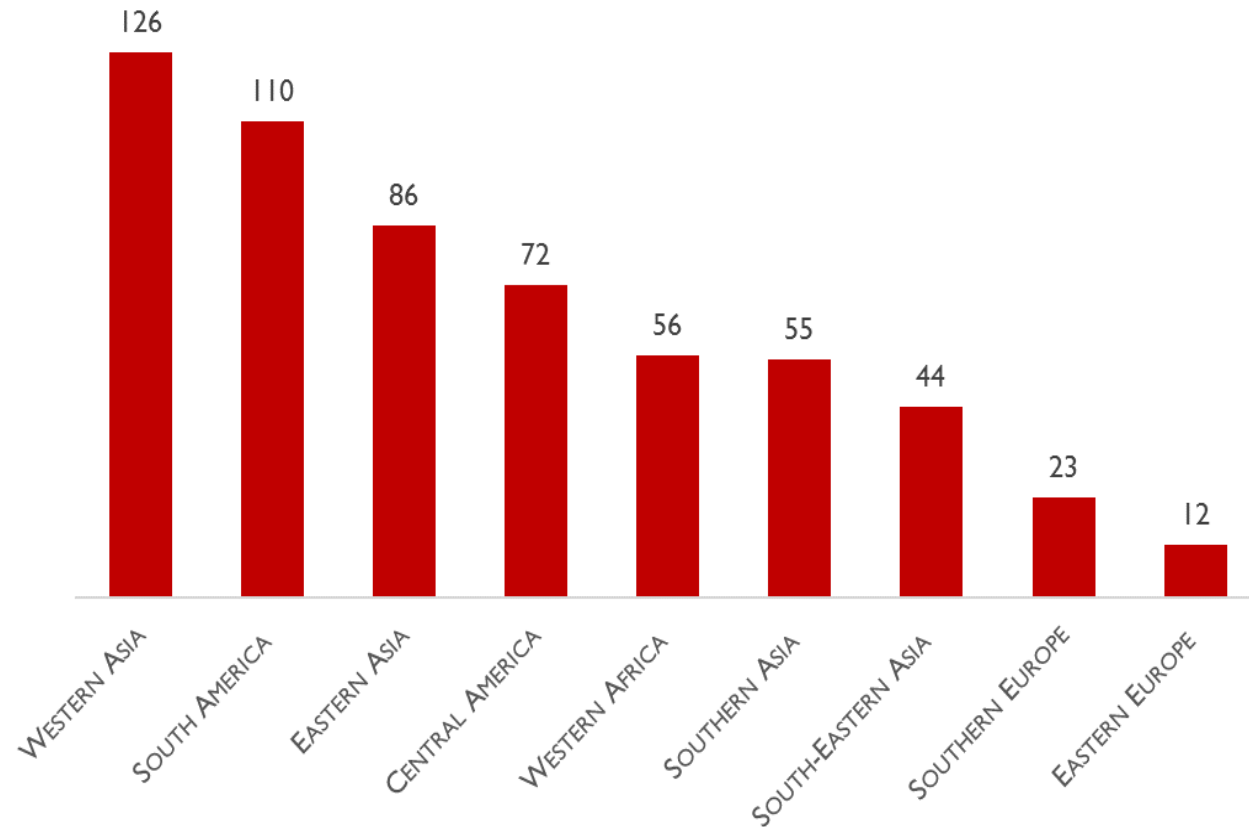
GROWTH BY REGION

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

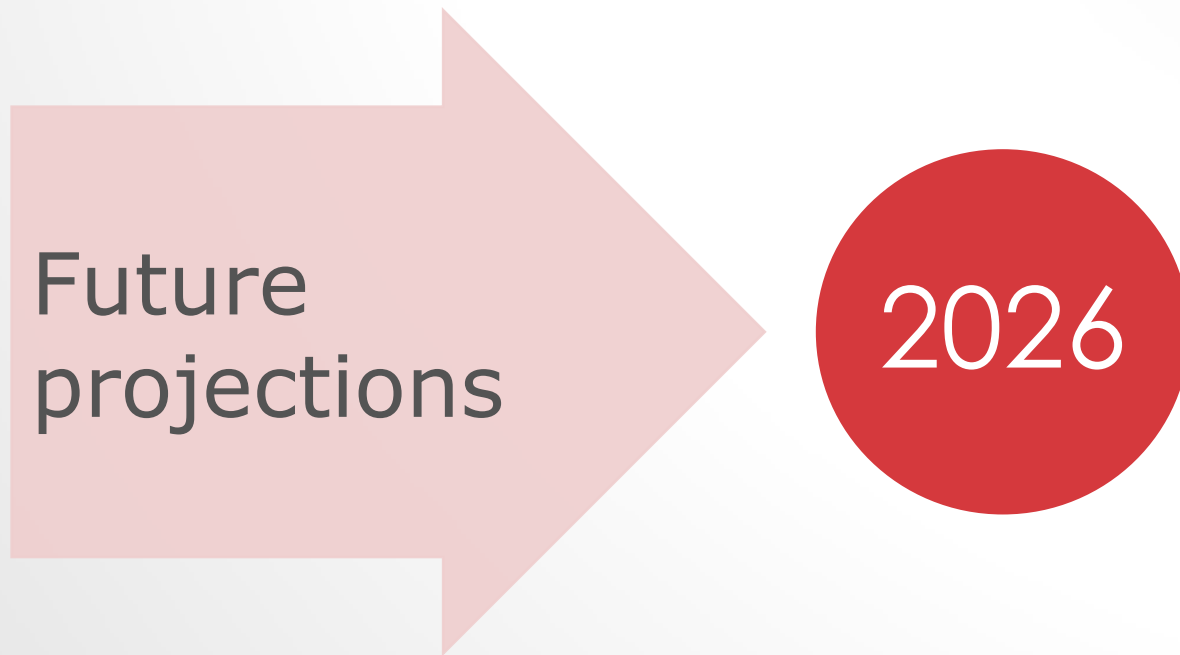


GROWTH BY SUB-REGION

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

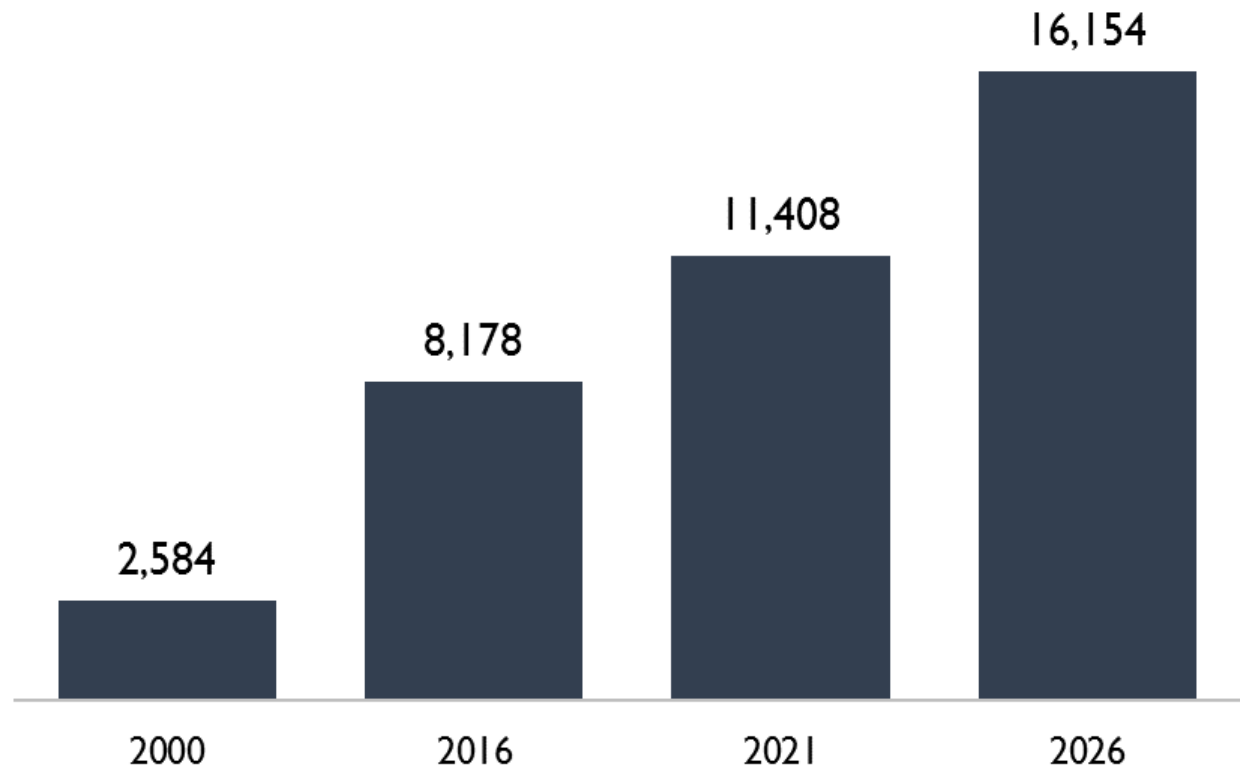


GLOBAL FORECASTS



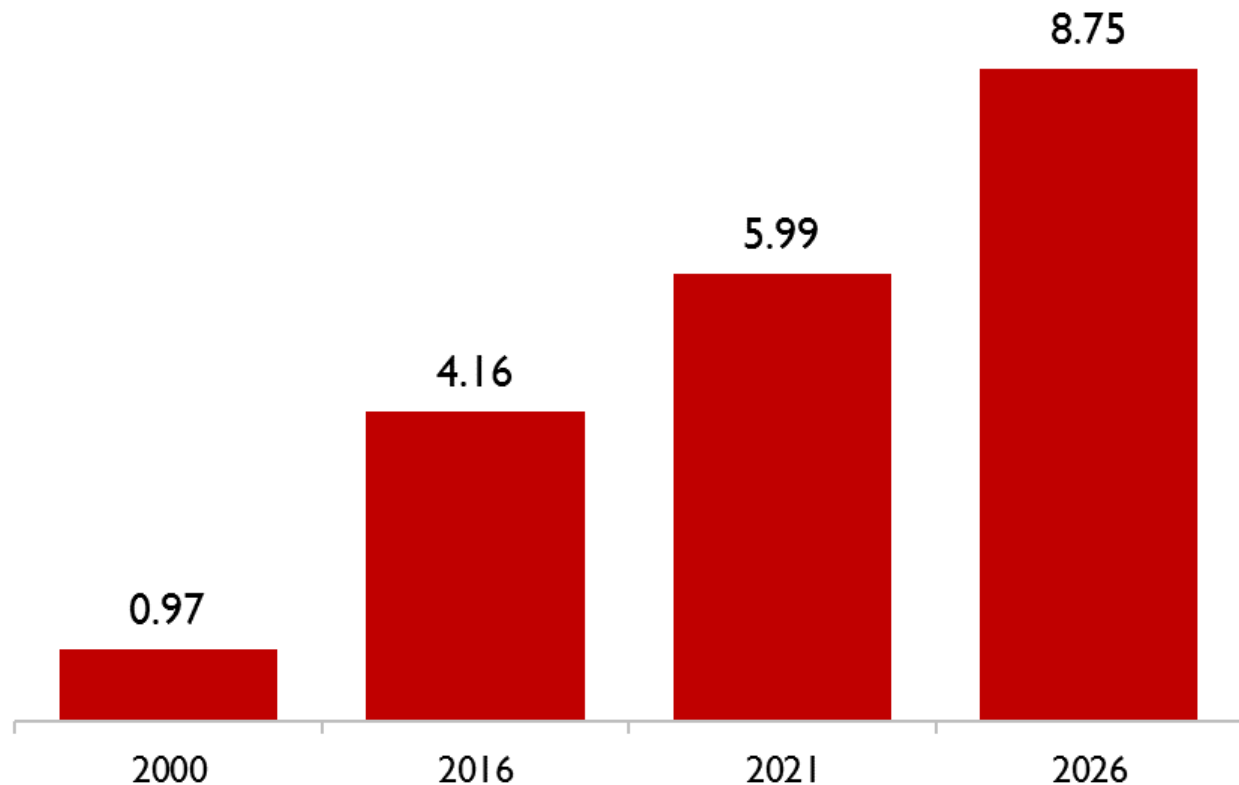
GLOBAL FORECAST

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



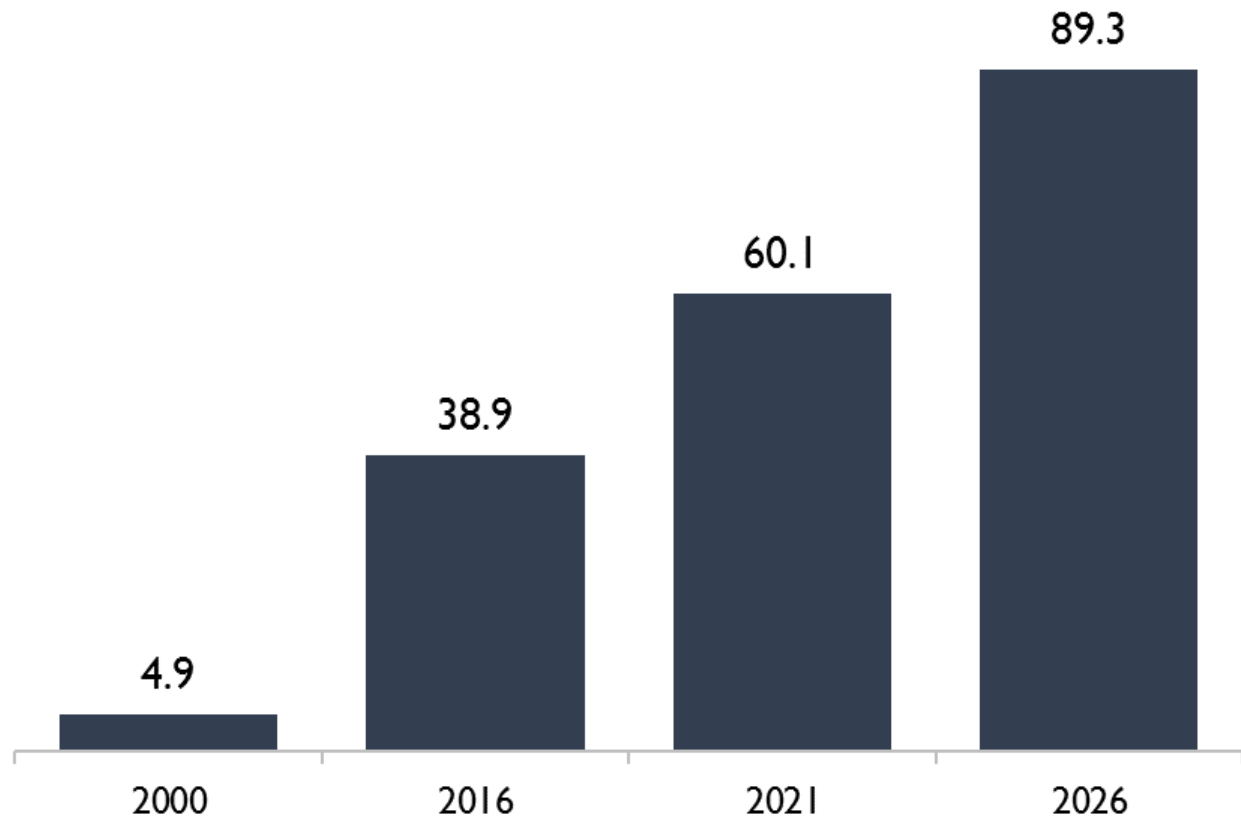
GLOBAL FORECAST

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

Increase	Schools	Students	Staff	Fee Income
Over 5 years	3,230	1,836,779	160,012	\$21.2 billion
Over 10 years	7,976	4,589,841	396,572	\$50.4 billion

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

iSC Research



ISC Online



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Intelligence
Reports



Benchmarking
Reports



Statistical
Reports

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Q&A

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in less than 24 hrs.**

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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.](#)