

# The **mtm**consulting Independent Education Sector Report 2010

**This report presents the authoritative independent commentary on the independent education market, both charitable and for-profit. Produced biannually by mtmconsulting, it is an objective review of the sector. It includes statistics, trends, forecasts and scenarios, providing a valuable information source for decision makers or those wishing to enter the sector.**

**The report is essential reading for Heads, Chief Executives, Bursars and Governors who need an objective review of the sector to inform their strategy and for the increasing number of individuals and organisations who are seeking to enter the market or build on their existing portfolio.**

**The report is based on qualitative and quantitative surveys and opinion from our panels of experts. It forecasts the prospects for the sector to 2020 and presents some visionary scenarios to 2030**

*Areas covered include:*

**Sector overview** – pupil trends, income and expenditure, structural trends, impact of Government legislation, analysis by segment. Trends in demand for the next ten years – analysis of who buys by family type and income, demand by age, and identification of the services that are subject to most significant change.

*More detail overleaf.*

**Forecasts of future demand** – including the impact of recession, government policy, public sector unrest, falling affordability, impact of free schools, demography & social trends. Forecasts to 2020 and scenarios to 2030. Updates on chains, and their impact on the sector, and school groups to watch.

*More detail overleaf.*



## About mtm

**mtmconsulting** is a strategic consulting firm providing a wide range of business, marketing and management services to the education sector. For more information:

[www.mtmconsulting.co.uk](http://www.mtmconsulting.co.uk)

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## About the author

Gavin Humphries is an expert in consumer research and market analysis with a track record of helping companies to understand and profit from social trends in the UK. Formerly the Research & Analysis Director at Datamonitor, Gavin has an MBA with Distinction from the London Business School and an MA in Geography from Oxford University.

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## What's in the report?

Examples of tables and illustrations included:

### Pupil trends

- Number independent school pupils in GB
- Independent schools' share of all pupils
- **Buyers of independent education by household type**
- Number of births to social class 1 and 2 in England and Wales
- Independent school rolls as a proportion of social class 1 and 2 children in England & Wales
- **Why non buyers don't use independent schools**
- Annual growth in fees and earnings
- **Independent schools are expected to become more affordable over the next 20 years**
- Forecast impact of the recession
- **Independent schools are expected to be educating a larger proportion of children in 10 years time**

### Financial trends

- Gross income of independent schools in the UK
- Average fees per independent school pupil in the UK
- **Proportion of schools expected to be subject to different fee constraints next 20 years**
- **Daughter schools abroad**
- Rising operating expenditure in schools
- Breakdown of operating expenditure in schools
- Rising operating expenditure in independent schools
- Number of Independent school teachers England and Wales
- Number of pupils per teacher in England
- **Proportion of schools expecting to cut teaching costs next 20 years**
- **Proportion of schools expected to pool non-teaching resources over next 20 years**
- Rising capital expenditure in schools
- **Proportion of schools likely to cut capital spending over the next 20 years**

### Structural trends

- Number of independent schools in GB
- Number of pupils per independent school
- **Operating costs by size of school, 2006**
- **Growth of independent school chains**
- **Commercial chains of independent schools**
- **Major federations of independent schools**

### Segment trends

- Number of independent school pupils aged 0-4 in the UK
- Forecast growth of nursery departments
- Number of independent school pupils 5-10 in the UK
- Forecast growth of pre-prep schools/departments
- Forecast growth of prep/junior schools
- Number of independent school pupils 11-15 in the UK
- Forecast growth of senior schools
- Number of independent school pupils 16+ in the UK
- Forecast growth of girls' schools
- Forecast growth of boys' schools
- Forecast growth of co-ed schools
- Number of independent school boarders in GB
- Number of boarders in GB by source
- Source of non-British boarding pupils whose parents live overseas
- Forecast growth of boarding schools with a large proportion of overseas pupils
- Forecast growth of boarding schools

### Political trends

#### Illustrations

- Expected impact of different governments on independent schools over the next 20 years
- The Conservatives are not expected to increase regulation
- Independent schools are expected to lose pupils to more good state schools over the next 20 years

### Forecasts to 2020

#### Illustrations

- **Forecast impacts on the number of independent school pupils in the UK 2010-2020**
- Forecast annual growth of independent rolls in the UK
- Forecast number of independent school pupils in the UK
- Number of independent schools pupils in GB

### Scenarios to 2030

#### Illustration

- Three scenarios for 2030

### Profiles

### Appendices