

The **mtm**consulting Fee-charging & State-funded Independent Education Sectors Report 2012

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

The report is essential reading for Heads, Chief Executives and Governors who need to have 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.

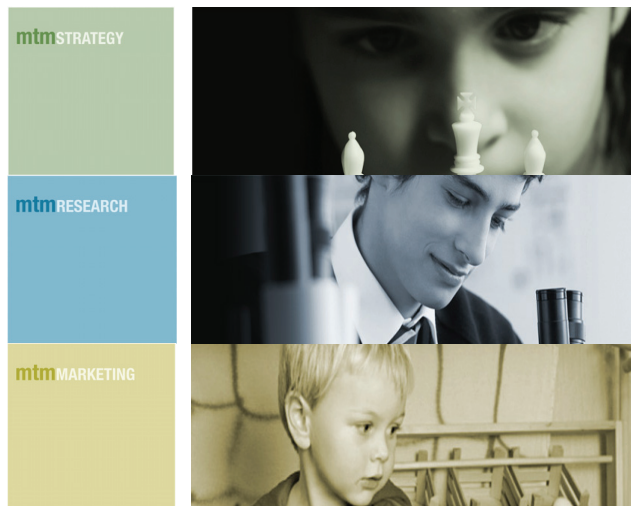
The report is based on qualitative and quantitative surveys and opinion from our panels of experts. It forecasts the prospects for the sector for the next 10 years and presents some visionary scenarios for 2030.

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.

New for 2012! Coverage of the fast-growing Academies sector (including free schools) – school numbers, pupil numbers and current trends

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



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 or email: office@mtmconsulting.co.uk

About the author

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What's in the report? (some topics explored)

Pupil trends

- The drivers of pupil numbers are changing over time
- Fee-charging schools are selling to less than a quarter of their target market
- Fee-charging schools' target market is growing rapidly
- Why parents in the target market don't buy
- Pupil numbers could decline by 3.2% in this recession
- Growth of state-funded Academies

Illustrations

- Number fee-charging school pupils in GB
- Fee-charging schools' share of all pupils
- Number of pupils in Academies, including historical comparisons
- **Buyers of fee-charging education by household type**
- Number of births to social class 1 and 2 in England and Wales
- Fee-charging school rolls as a proportion of social class 1 and 2 children in England & Wales
- **Why non buyers don't use fee-charging schools**
- Annual growth in fees and earnings
- **Continuing** impact of the recession

Financial trends

- Gross fee income has doubled in a decade
- Schools will have to cut fee inflation
- Daughter schools are starting to generate income
- Teaching costs are still on an upward trend
- Capital expenditure per pupil has grown 9% a year for a decade
- How fee-charging and state-funded schools compare

Illustrations

- Gross income of independent schools in the UK
- Average fees per independent school pupil in the UK
- **Daughter schools abroad**
- Trends in operating expenditure in schools
- Breakdown of operating expenditure in schools
- Number fee-charging school teachers England and Wales
- Number of pupils per teacher in England
- Rising capital expenditure in schools

Structural trends

- Seeking economies of scale will re-establish the trend to larger schools
- Growth of the commercial chains has slowed

Illustrations

- 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

- The long-term prospects for pre-prep are, at best, stable
- Standalone prep schools have been most affected by the recession
- Sixth forms are still growing
- Co-educational schools will enjoy continued growth
- Continuing decline in the number of boarders who live in the UK

Illustrations

- Number of independent school pupils aged 0-4 in the UK
- Number of independent school pupils 5-10 in the UK
- Forecast growth of pre-prep schools/departments
- Number of independent school pupils 11-15 in the UK
- Number of independent school pupils 16+ in the UK
- Number of independent school boarders in GB
- Number of boarders in GB by source
- Source of non-British boarding pupils whose parents live overseas

Forecasts to 2020

Illustrations

- **Forecast impacts on the number of independent school pupils in the UK 2010-2020**
- Forecast number of fee-charging school pupils in the UK
- Forecast number of Academy pupils in England
- Forecast fee-charging school nursery pupils over the next 10 years
- Forecast fee-charging school pre-prep/prep/junior pupils over the next 10 years
- Forecast fee-charging school senior pupils over the next 10 years
- Forecast fee-charging school sixth form pupils over the next 10 years
- Forecast state-funded primary Academy pupils over the next 10 years
- Forecast state-funded secondary Academy pupils over the next 10 years
- Forecast state-funded sixth form Academy pupils over the next 10 years

Scenarios to 2030

Illustrations

- Three scenarios for 2030

Profiles

- Commercial chains
- Federations
- Livery companies
- Alliances and associations
- Academy chains
- School groups to watch

Appendices