

Annual Census Snapshot 2015

Foreword

This year's Census of the 1,267 independent schools across the UK that collectively make up ISC provides confirmation of the resilience and stability of the sector. Pupil numbers now stand at their highest level since records began in 1974. It is wonderful news that pupil numbers in schools in the north of England and Wales have grown this year. As David Turner explains in his book *The Old Boys*, in many respects this is a golden year for independent schools.

This Census is all about hard facts. It shows comprehensively and dispassionately what the state of the sector is. And overwhelmingly, the facts that this Census lays out are of a sector that is performing with resilience and stability.

How is it that the independent sector has confounded the predictions of doom and gloom? At the heart of it all are high expectations and outstanding attainment; our schools are well ahead of the competition. Over half of our pupils' A-levels were graded A*/A last summer, helping them to access the top universities and jobs. The proportion of GCSE/IGCSE entries graded A* rose to 33% in stark contrast to the fall nationally.

High standards at ISC schools are also apparent from the range of wonderful opportunities for pupils outside the classroom, and from the serious, professional approach to pastoral care they offer.

Above all, it is the hard work of the talented staff at ISC schools – both teaching and non-teaching staff – who provide the education that parents find so attractive for their children. They are able to do this because of the independence that our schools have and cherish: undistracted by state-imposed accountability measures, they are free to focus on the needs of each individual pupil. The figures in this Census are therefore testament to their work.

Barnaby Lenon, Chairman
Independent Schools Council

For more information about the Independent Schools Council
Annual Census, please visit: www.isc.co.uk

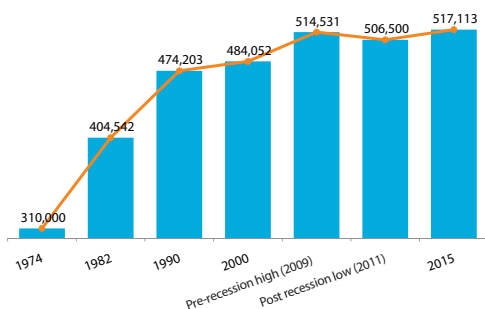
Independent schools have weathered economic pressures well and a stronger sector is emerging as a result

RECORD NUMBER OF PUPILS

Record pupil numbers this year at ISC schools

- There are 517,113 pupils at 1,267 ISC member schools, up from 511,928 in 2014, an increase of 1%.
- This represents the highest increase in pupil numbers since the start of the economic crisis in 2008.
- Moreover, pupil numbers have exceeded the previous (pre-recession) high and now stand at their highest level since records began in 1974. Increases in pupil numbers this year reflect increases in both British and non-British pupils

Long term trends in pupil numbers*



* The above shows key milestones in pupil numbers and the y-axis has been rebased to 300,000 pupils. Note 1982 was the first year that the Census was carried out using a computer. The pre-recession high occurred in 2009 reflecting the time lag in economic difficulties affecting the sector. The post-recession low occurred in 2011.

Pupil numbers now stand at their highest level since records began in 1974.

REGIONAL TRENDS

Regionally, economic pressures were more pronounced outside London and the South East but this year there are clear green shoots in recovery.

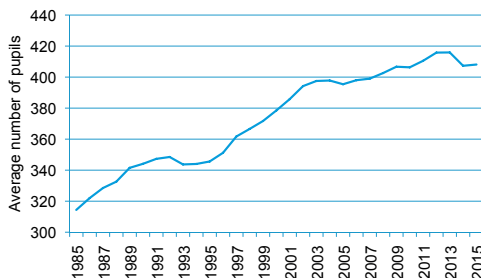
- For the first time since 2007, there are increases in like-for-like pupil numbers in the North of England.
- Moreover, Wales, one of the worst hit areas in terms of pupil numbers at ISC schools, experienced significant increases in pupil numbers this year.

RESPONDING TO PRESSURES

Schools appear to have adapted well to economic pressures.

- Careful financial planning has allowed schools to implement the lowest fee increase since 1994.
- Structurally, schools are growing in size and, on occasion, merging with other ISC schools to benefit from economies of scale (nine ISC schools merged with other ISC

Mean school size: 1985-2015



The independent sector is diverse and becoming increasingly so

PUPILS OF ALL TYPES

ISC schools vary from large well known boarding schools to small day schools best known in their local communities, from single-sex schools to co-educational schools, and from special schools catering exclusively for SEND pupils to schools providing specialist education in music and dance.

382,389 pupils attend co-educational schools

134,724 pupils attend single-sex schools

446,471 pupils are day pupils

70,642 pupils are boarders

66,026 pupils are identified as having a special educational need

2,500+ pupils attend specialist music and dance schools

PUPILS FROM ALL BACKGROUNDS

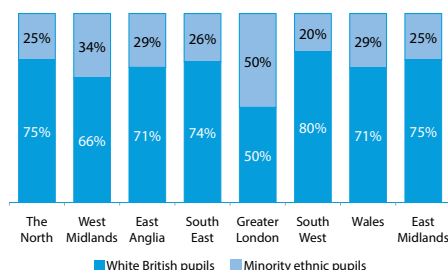
- ISC pupils come from a wide range of socio-economic backgrounds; from pupils with the most affluent parents to pupils from the most financially disadvantaged families on full bursaries: 5,406 pupils are currently on full bursaries at ISC schools.

5,406 pupils are currently on full bursaries at ISC schools

ETHNIC DIVERSITY

- Britain is ethnically diverse and this is mirrored in ISC schools; 29% of ISC pupils are from a minority ethnic background and this varies regionally, as in Britain as a whole.
- Further, ISC schools have reflected the increasing diversity of Britain over time; the proportion of minority ethnic pupils at ISC schools has increased from 23% to 29% since 2009.

Ethnicity of ISC pupils by region (2015)



29% of ISC pupils are from a minority ethnic background

- Pupils move freely between the state-funded and independent sectors; one quarter of all new pupils to ISC schools this year came from state-funded schools.
- Finally, ISC schools are proud to compete globally and welcome international pupils to their schools; 27,211 pupils are from overseas. These pupils add a global perspective that is not generally found at state-funded schools.

The independent sector is committed to controlling fee increases & providing an increasing amount of fee assistance

SCHOOL FEES

- This year fees increased by 3.5%, the lowest increase since 1994.
- Fee levels vary significantly by region, reflecting the sensitivity of schools' financial planning to local economies; fees range from just over £3,000 per term for a typical day school in Wales to just over £5,000 per term for a typical day school in London.

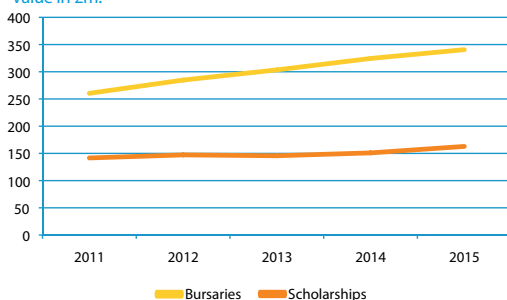
FEE ASSISTANCE

- Fee assistance grew again this year, continuing the long term trend. Almost 170,000 pupils (33% of all pupils), an unprecedented number, now receive help with their fees with a record value of more than £800m.

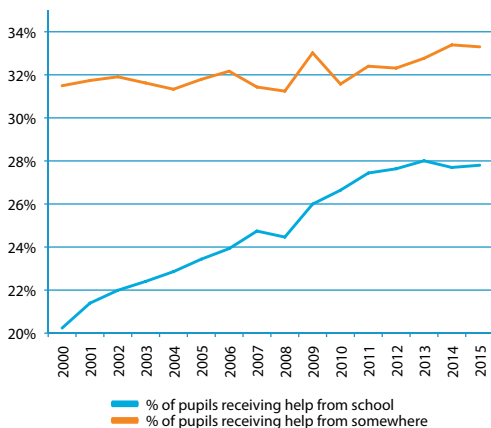
SCHOLARSHIPS VERSUS BURSARIES

- ISC schools provide more than twice as much assistance in the form of means tested bursaries as they do scholarships
- Over 40,000 pupils currently benefit from a means tested bursary, valued at almost £350m and representing an increase of 6% compared to last year, well above the rate of fee increase.

Trends in bursaries versus scholarships at ISC schools: 2011-2015.
Value in £m.



Proportion of pupils receiving fee assistance: 2000 to 2015



40,000 currently benefit from a means tested bursary
valued at almost **£350m**

This year fees increased by 3.5%, the lowest increase since 1994.

The independent sector provides further public benefit beyond fee assistance

PUBLIC BENEFIT

Beyond fee assistance, ISC schools undertake a wide range of work with state-funded schools and in the wider community.

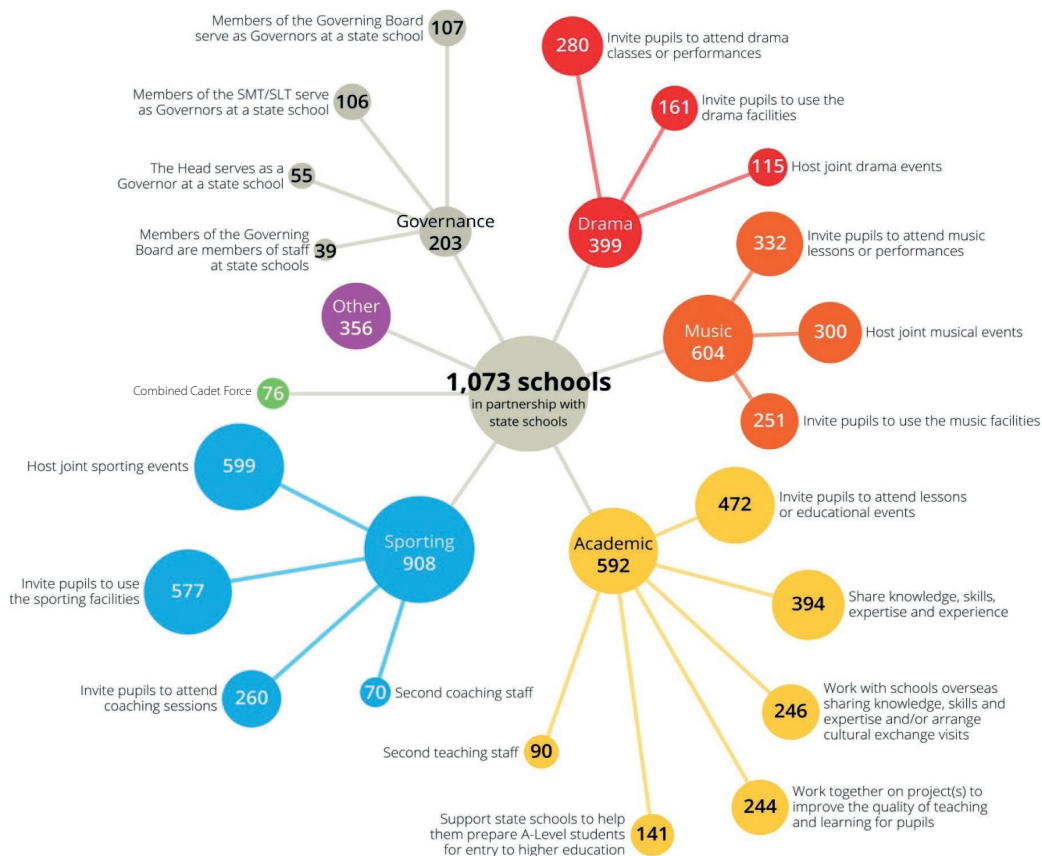
- 93% of schools are involved in such partnerships. To put this figure in context, only 80% of ISC schools hold charitable status.

CHARITY WORK

- In addition to partnerships, nearly all ISC schools (98%) raise funds for charities.
- This year, more than £15m was raised for charity by ISC schools.

98% ISC schools raised money for charity this year

Partnership activity breakdown: 2015



Note: Many schools are involved in more than one activity therefore the numbers above will not add up to 1,073

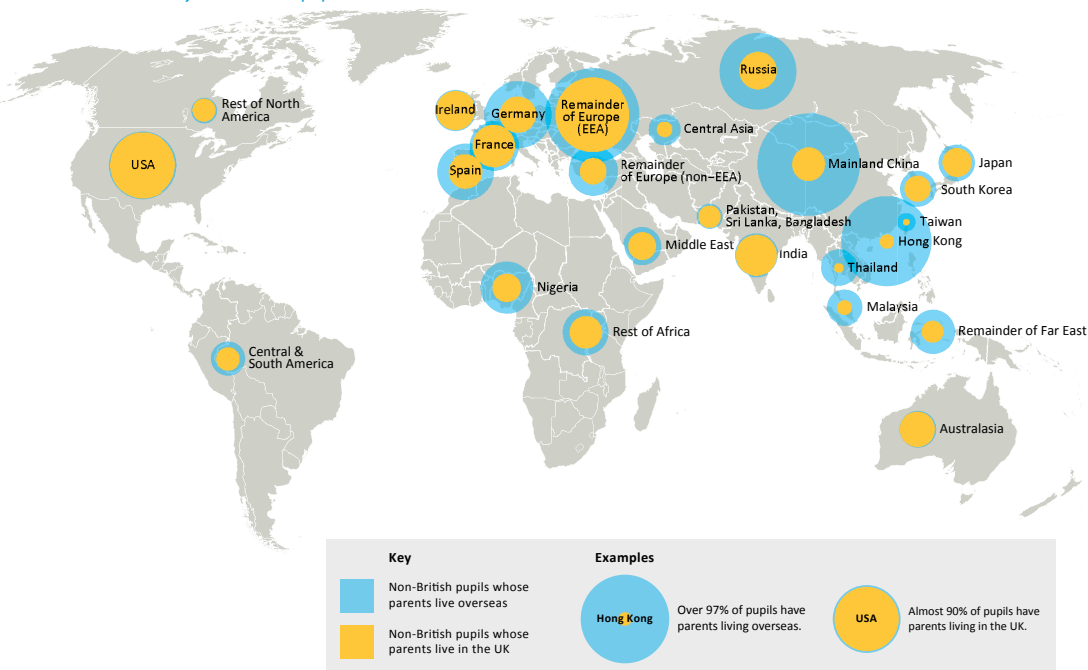
UK independent schools are proud to compete on a global scale

GLOBAL REACH

ISC schools are attracting an increasing number of non-British pupils; this is testament to the world class education that ISC schools offer. ISC schools welcome these pupils and the diversity that they bring.

- There are 27,211 non-British pupils at ISC schools whose parents live overseas.
- A further 16,821 pupils are non-British with parents living in the UK.
- Collectively, non-British pupils make up 8.5% of all ISC pupils.

Nationality of non-British pupils at ISC schools



OVERSEAS CAMPUSES

An increasing number of ISC schools have overseas campuses; there are currently 44 campuses overseas educating 24,710 pupils.

44 overseas campuses
educating 24,710 pupils

HIGHER EDUCATION OVERSEAS

Most (92%) ISC pupils progress to higher education and the majority attend Russell Group universities. Slowly increasing numbers are choosing to study overseas, reflecting the global outlook of pupils at ISC schools.

4% of ISC pupils going on to higher education chose to study at non-UK universities in 2014.