

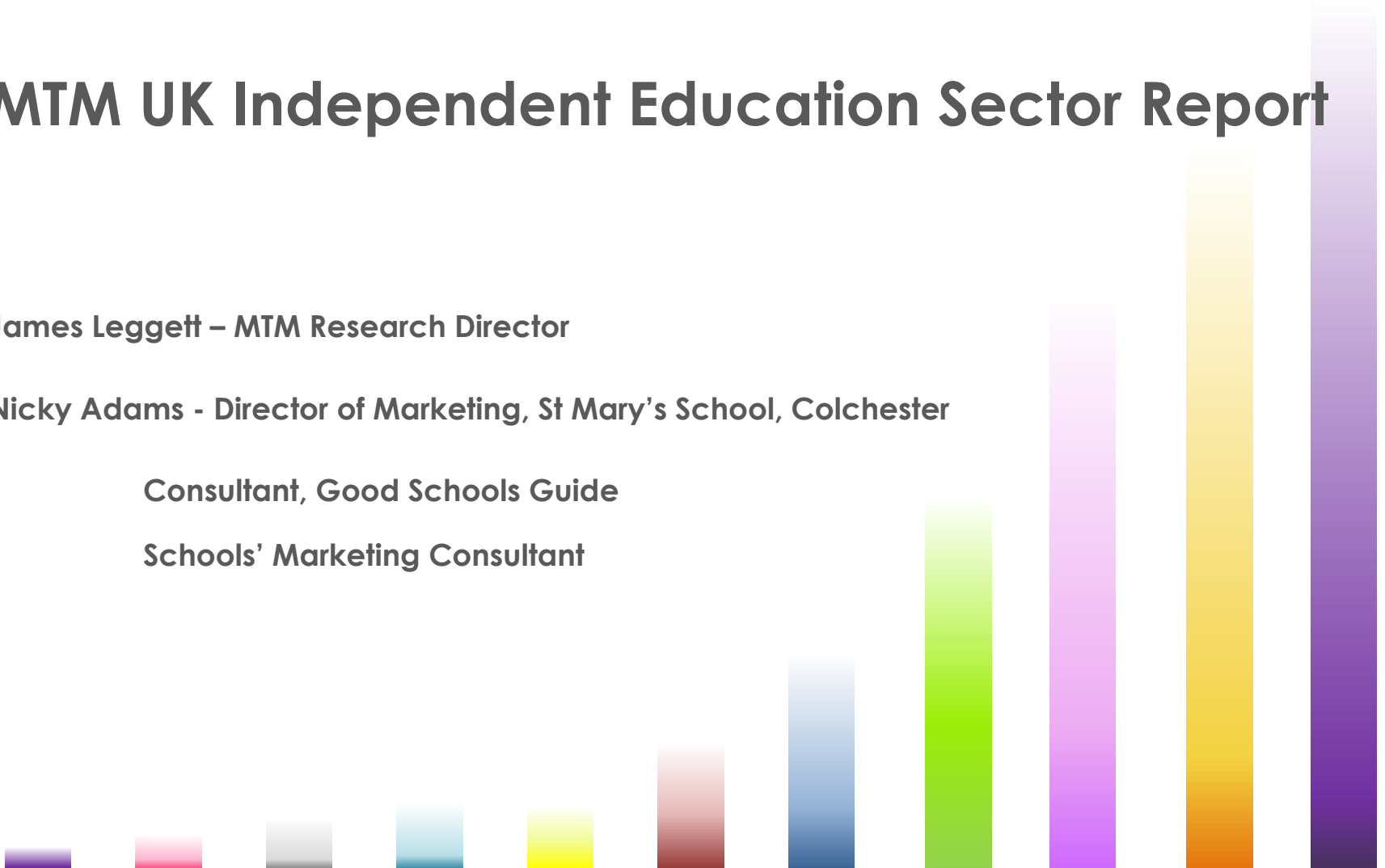
MTM UK Independent Education Sector Report

James Leggett – MTM Research Director

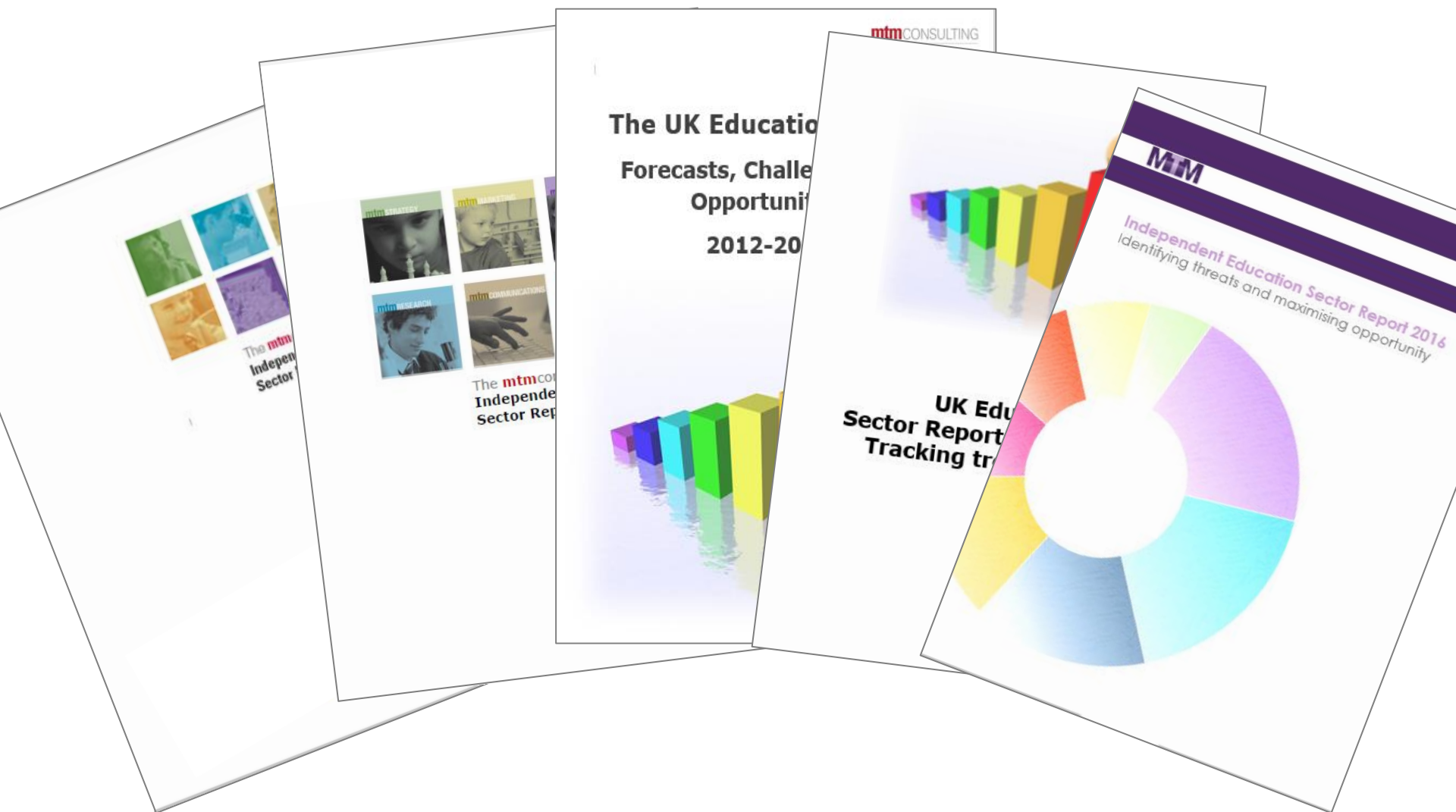
Nicky Adams - Director of Marketing, St Mary's School, Colchester

Consultant, Good Schools Guide

Schools' Marketing Consultant

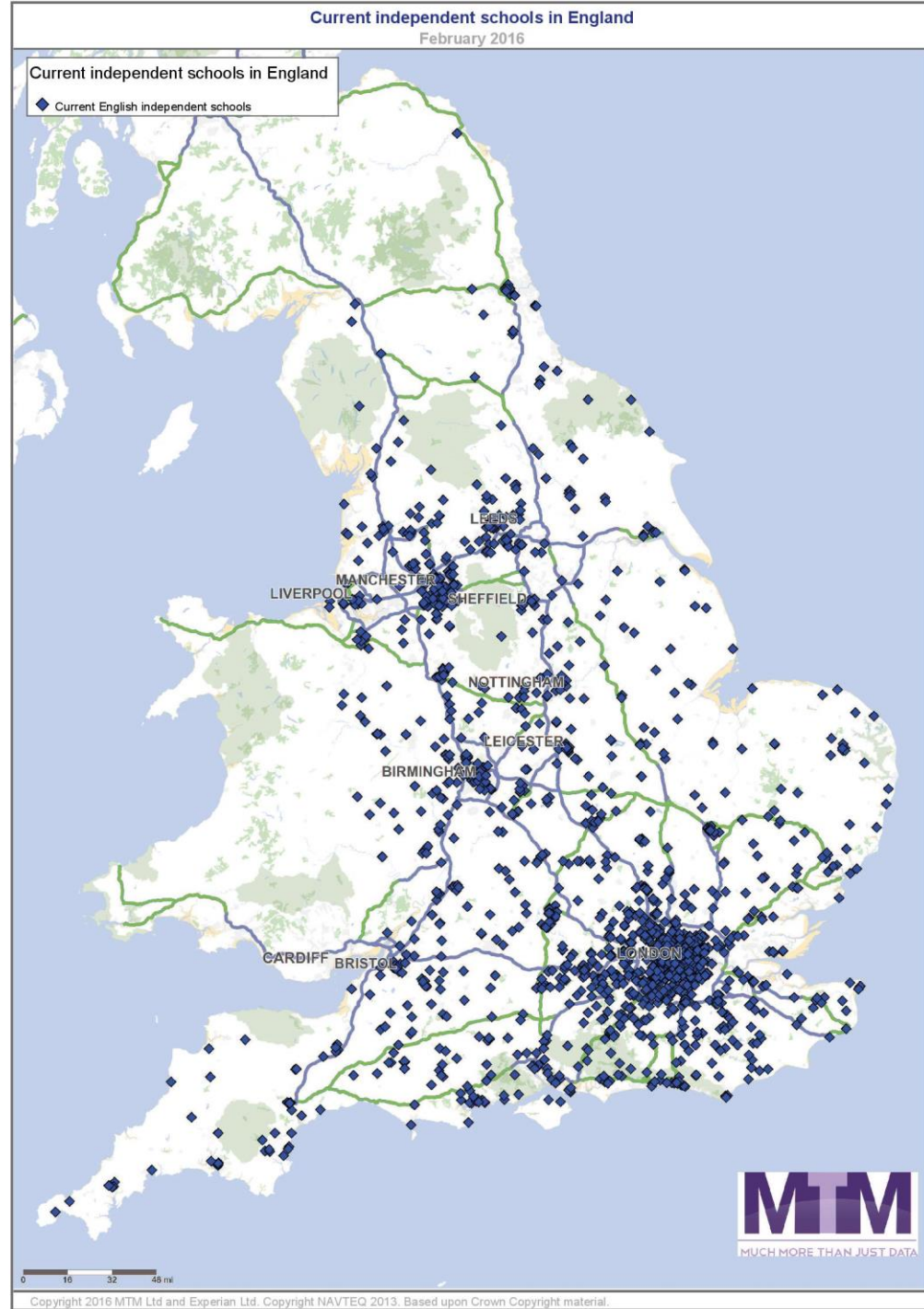


About the sector report



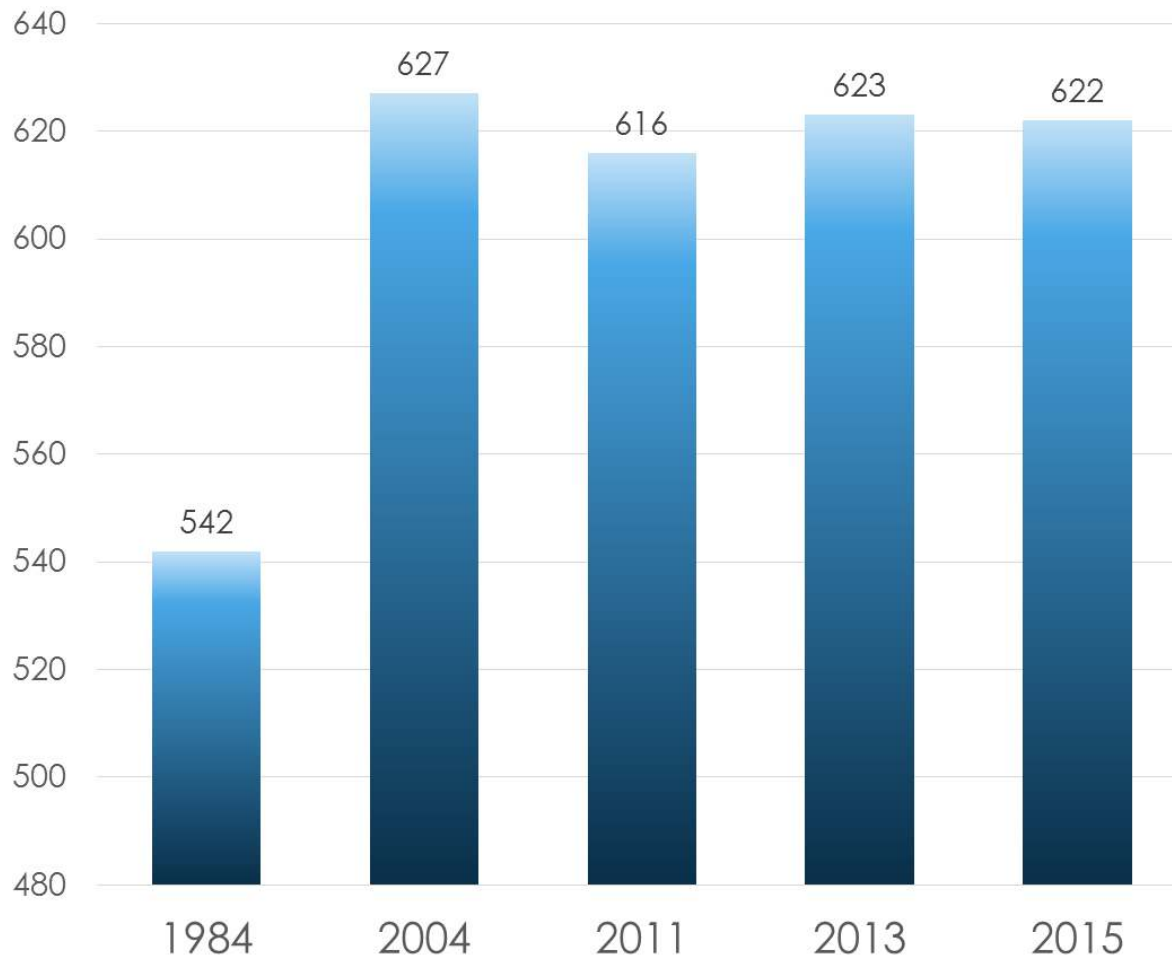
Locations

Region	No of Schools
London	555
South East	536
North West	260
East of England	237
South West	224
West Midlands	209
East Midlands	158
Yorks & Humber	137
North East	41



Total numbers of pupils

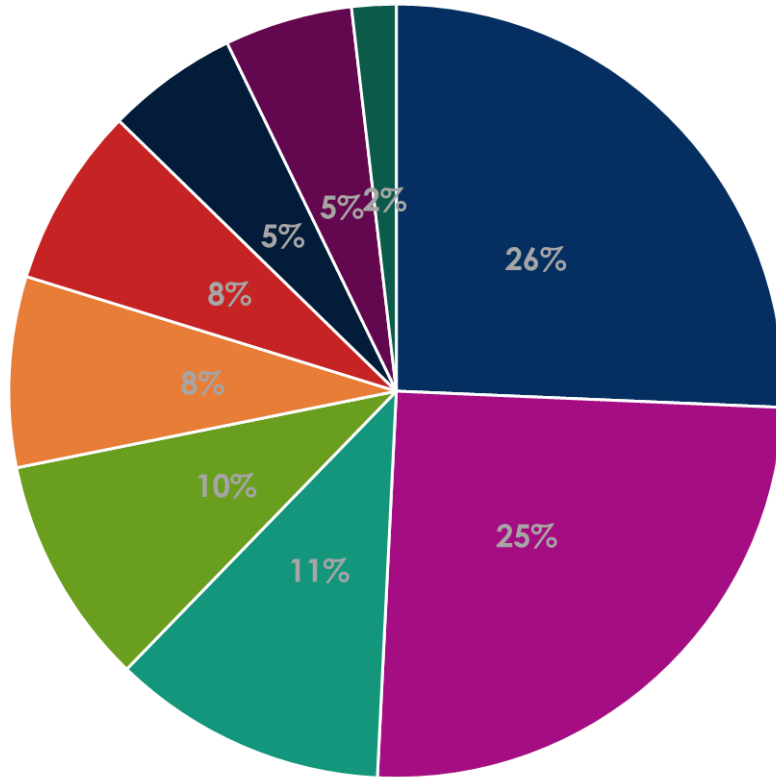
Number of fee-paying pupils in GB ('000)



517,000 in ISC schools in 2015, up from 512,000 in 2014

Data from DfE

The Regions



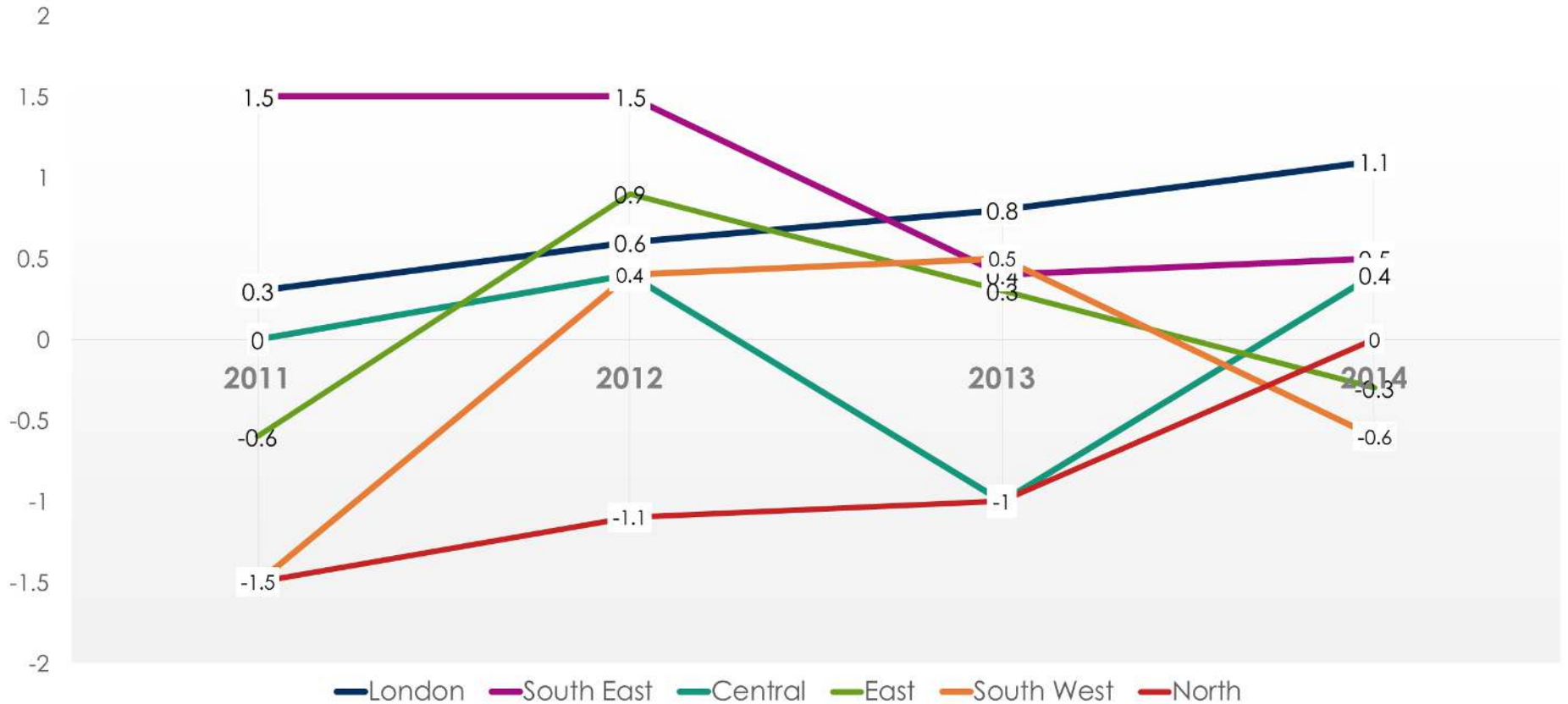
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- South East
- East
- North West
- Yorkshire and Humber
- North East
- London
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- West Midlands
- East Midlands

Data from DfE

The Regions

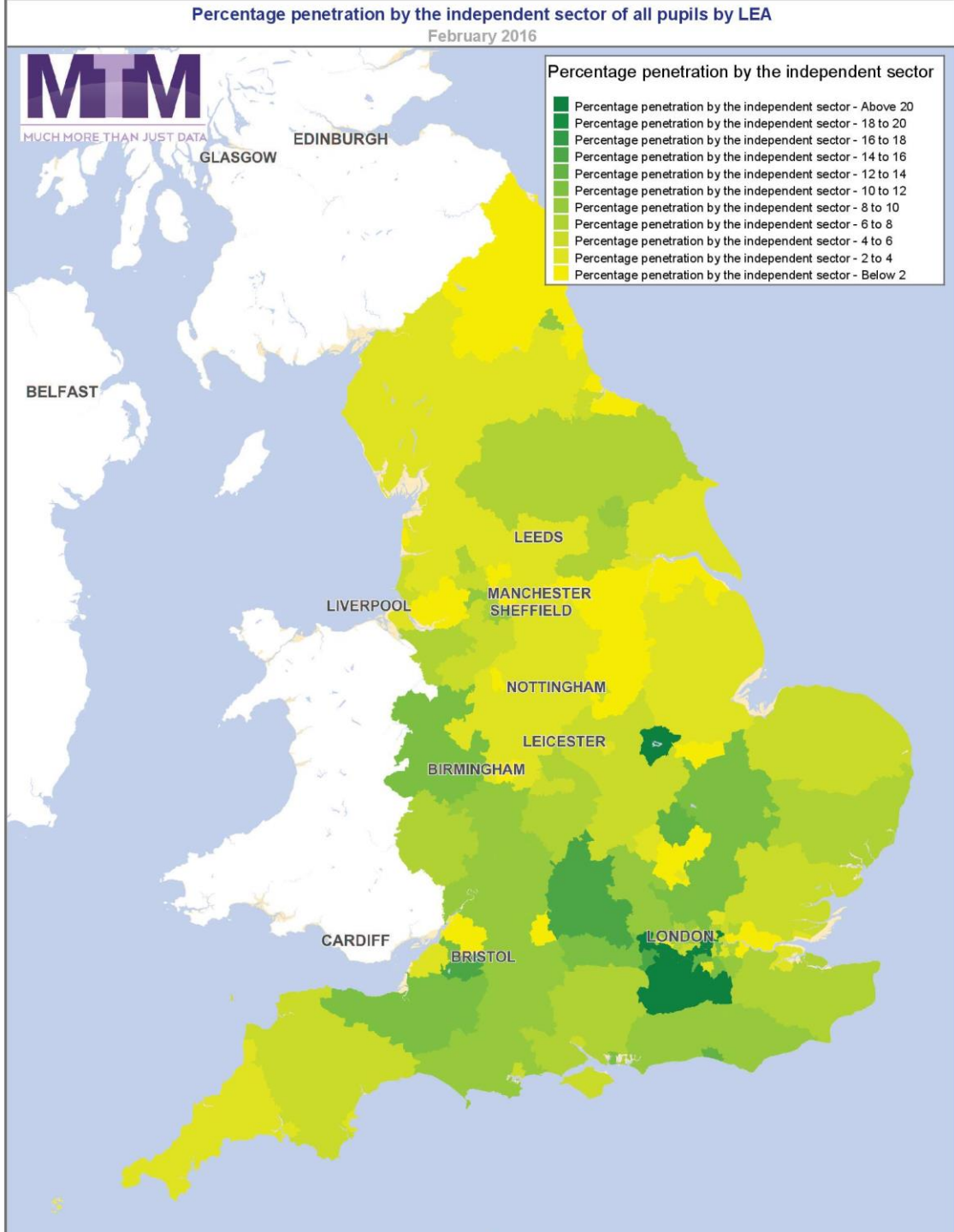
Year on year percentage change



Data from DfE

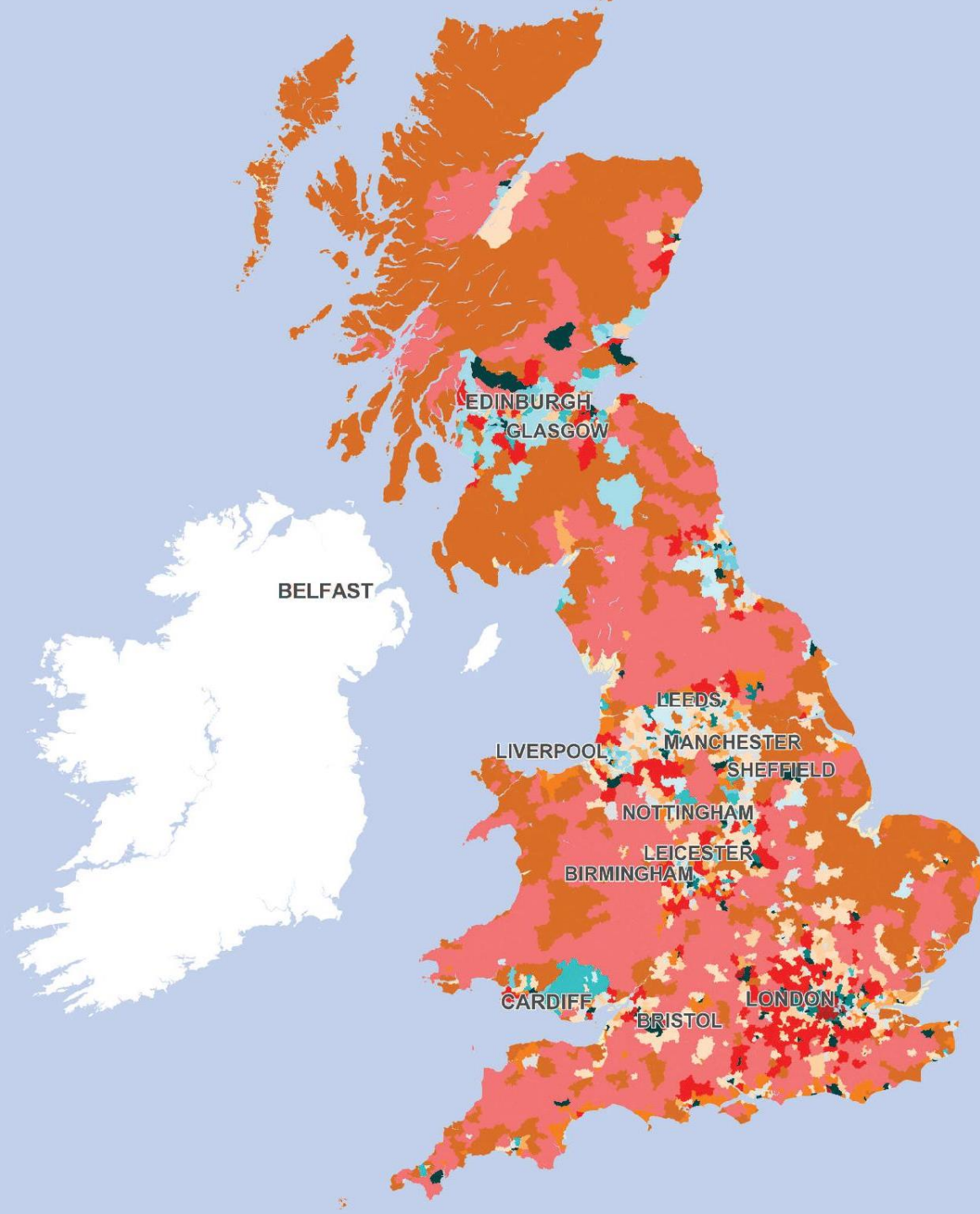
The Regions – Penetration by independent schools

Data from DfE



The Regions – Why London?

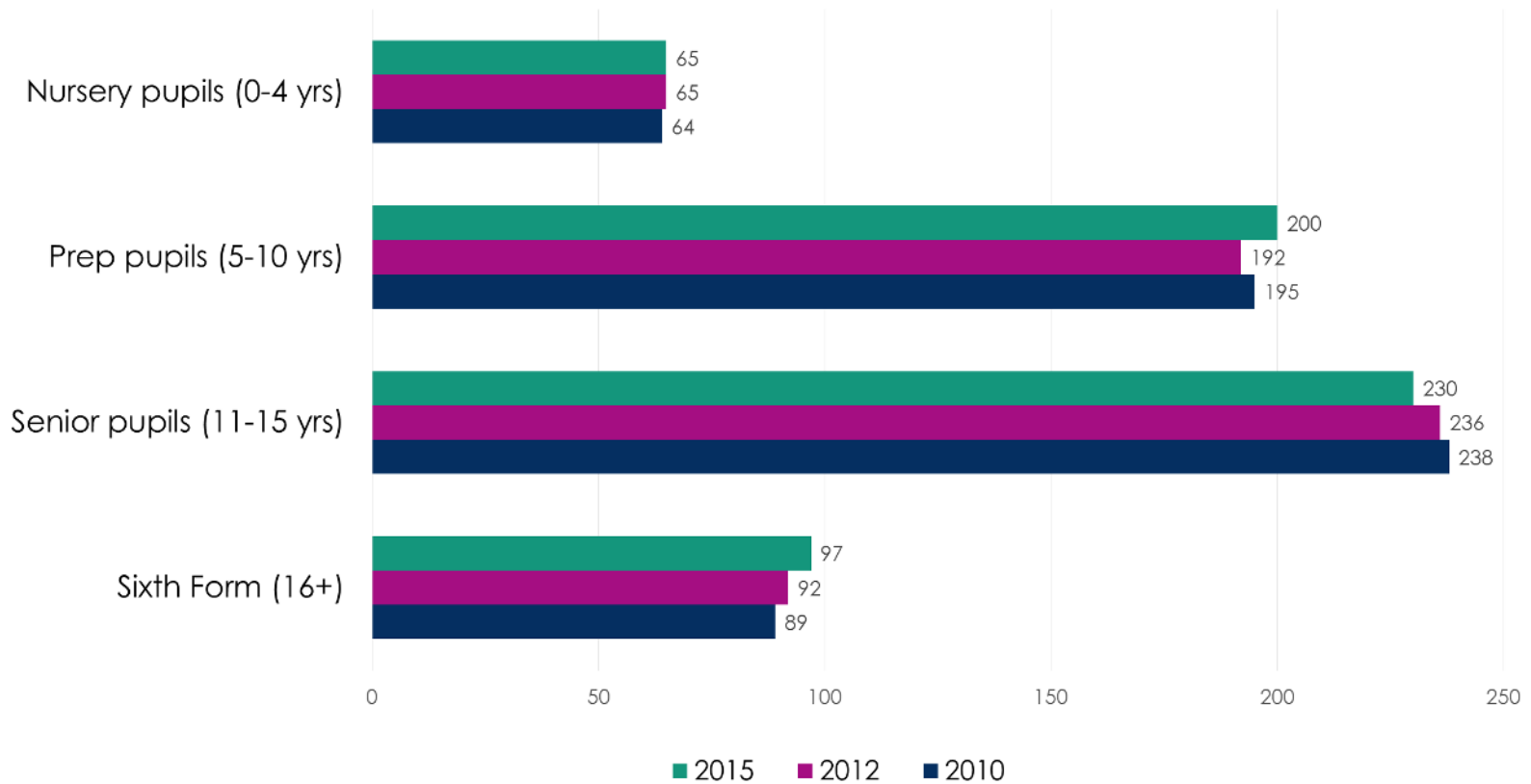
- Dominant Mosaic Group - A City Prosperity
- Dominant Mosaic Group - B Prestige Positions
- Dominant Mosaic Group - C Country Living
- Dominant Mosaic Group - D Rural Reality
- Dominant Mosaic Group - E Senior Security
- Dominant Mosaic Group - F Suburban Stability
- Dominant Mosaic Group - G Domestic Success
- Dominant Mosaic Group - H Aspiring Homemakers
- Dominant Mosaic Group - I Family Basics
- Dominant Mosaic Group - J Transient Renters
- Dominant Mosaic Group - K Municipal Challenge
- Dominant Mosaic Group - L Vintage Value
- Dominant Mosaic Group - M Modest Traditions
- Dominant Mosaic Group - N Urban Cohesion
- Dominant Mosaic Group - O Rental Hubs



Data from MTM catchment analysis

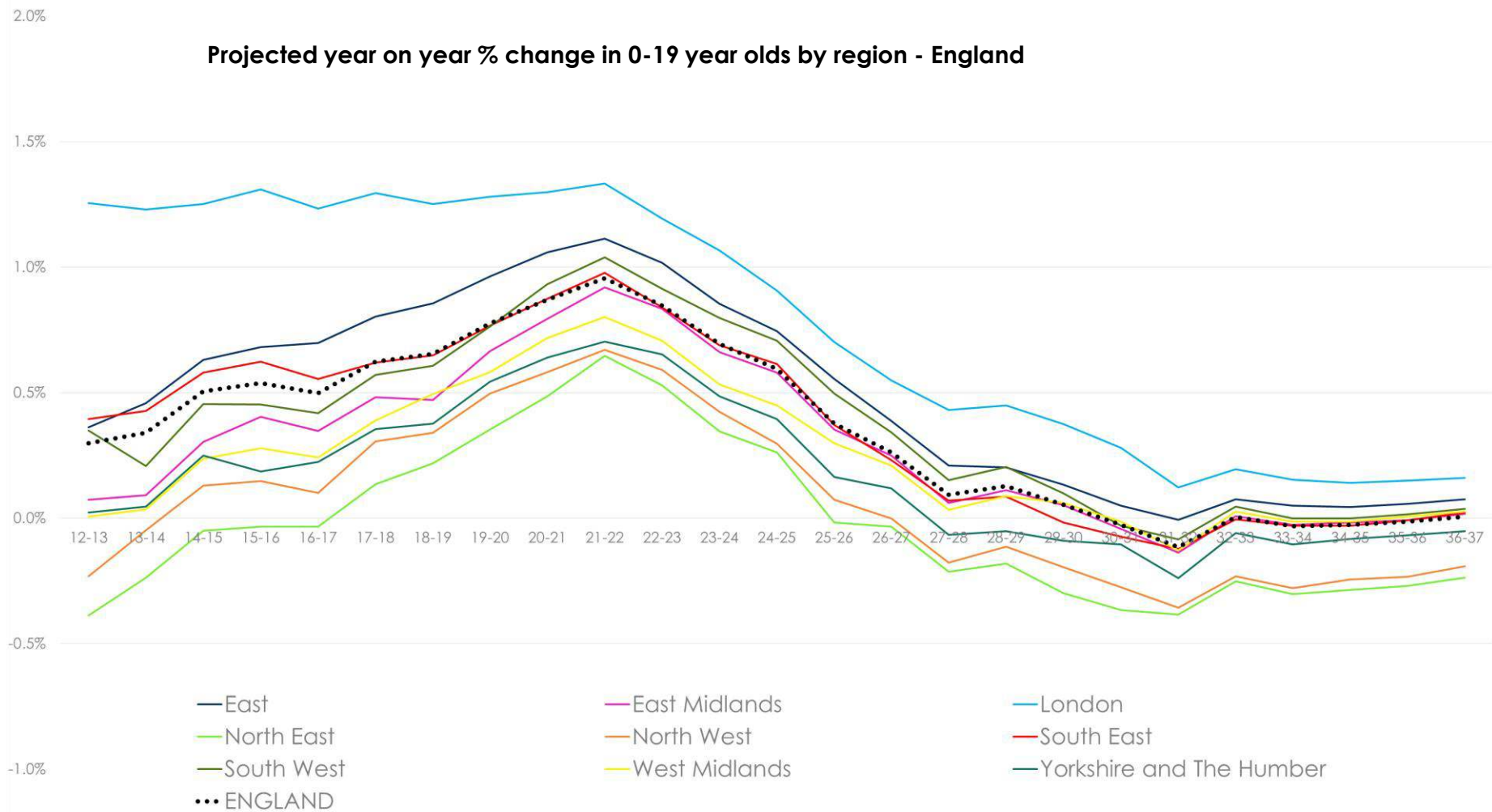
The Sections

Number of fee-paying pupils by section in England & Wales ('000s per year)



The future

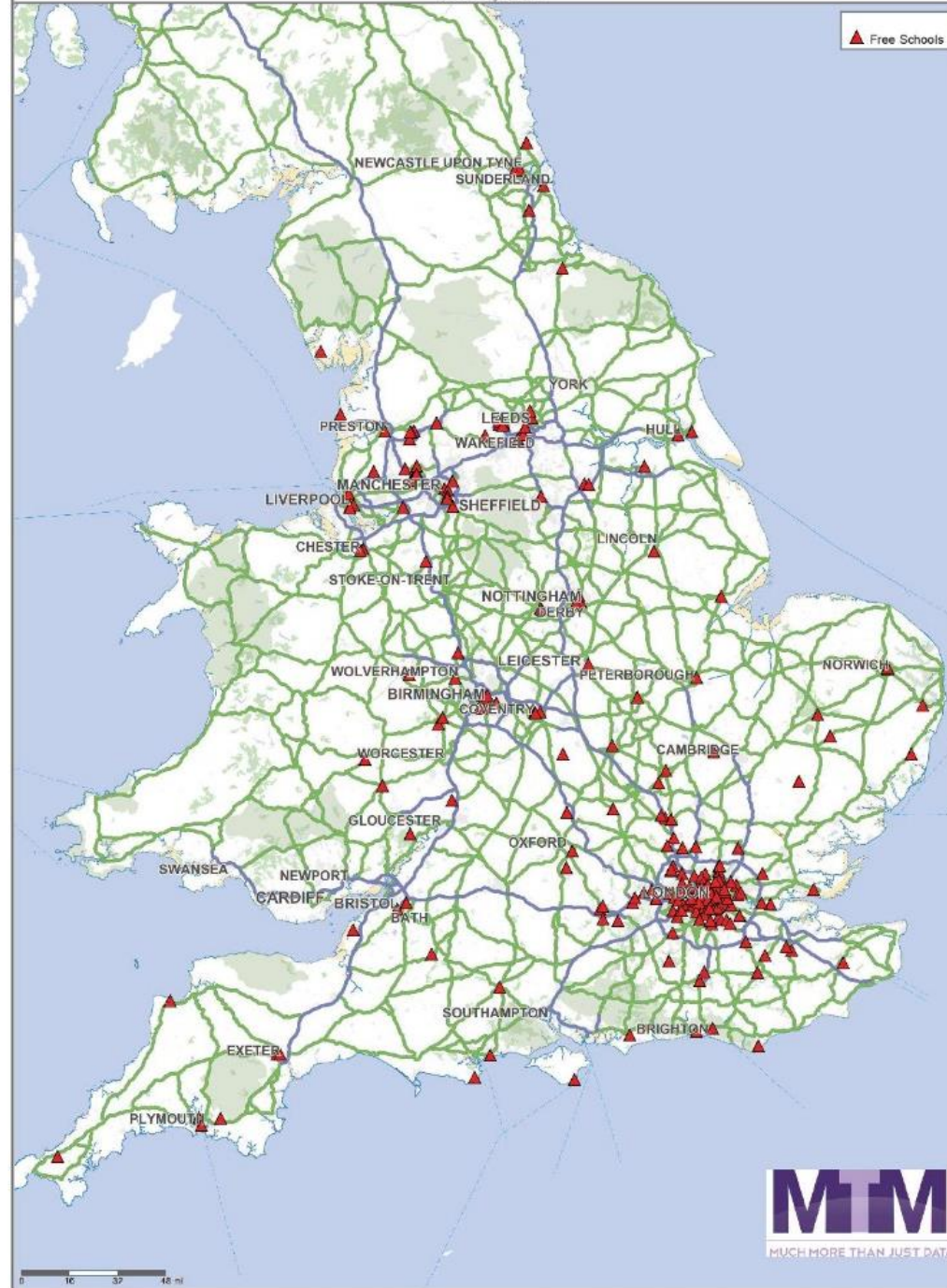
Projected year on year % change in 0-19 year olds by region - England



Data from DfE

The free schools

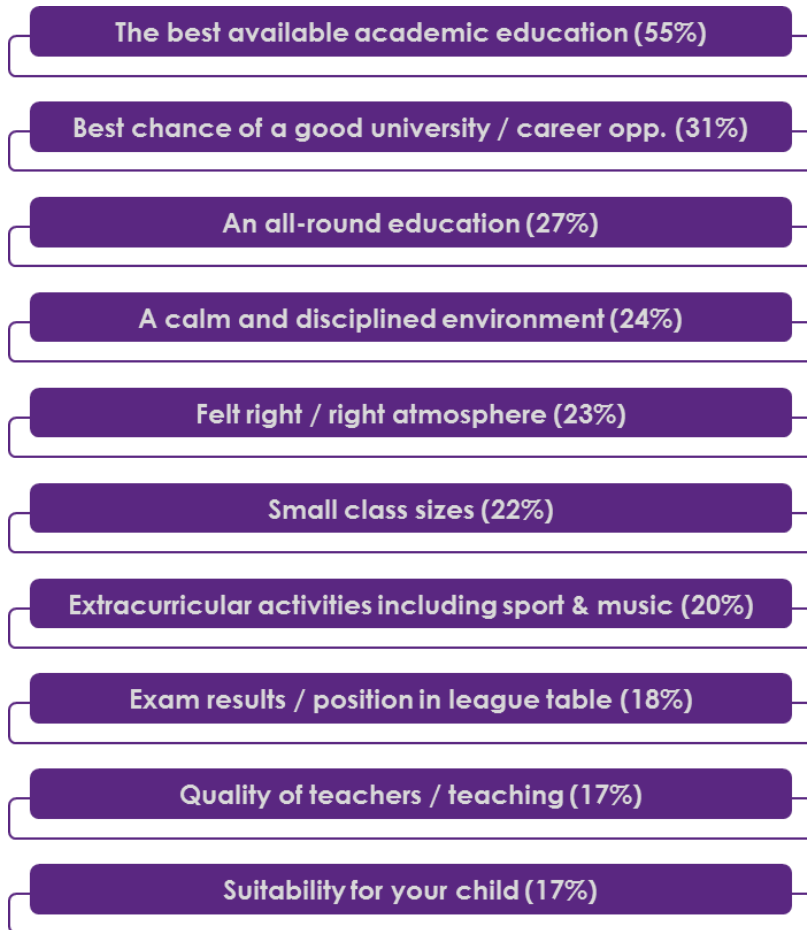
Free Schools in England 2015
January 2016



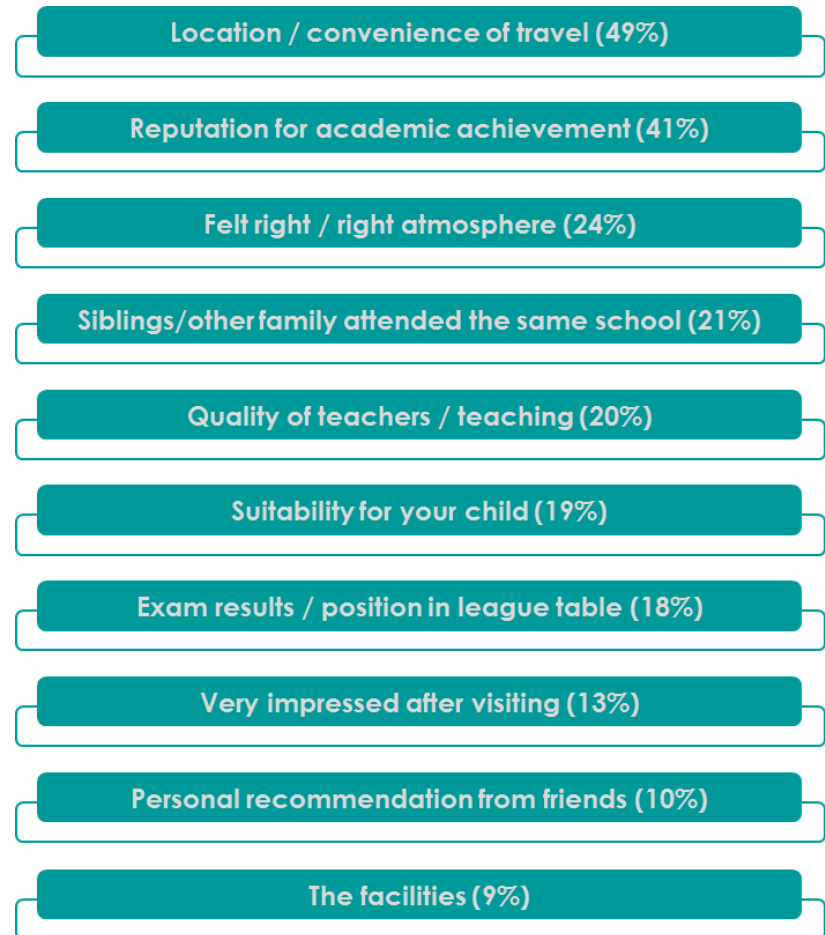
Data from DfE

The importance of a niche – reasons for school choice

Independent schools (current buyers)



State schools ('non-buyers')



Data from MTM The Missing Million 2016

Any questions?

Positioning for independent schools

Where's our niche?

Nicky Adams

Director of Marketing, St Mary's School, Colchester

Writer & consultant, Good Schools Guide



where's our niche?

positioning

what is
positioning?

a marketing strategy that aims to make
a brand occupy a distinct position,
relative to competing brands,
in the mind of the customer

where's our niche?

positioning

what are their aims?

expand? improve?

research

understand their personalities

strengths? weaknesses?

swot analysis

who are their customers?

yours? not yours?

customer profile

who are our
competitors?

where's our niche?

positioning

what are our strengths?

key messages to pupils and families

who are our pupils and families?

what do they want?

parental survey

who are we?

what makes us different?

points of differentiation

who are our potential pupils and families?

what do they want?

what do they think of us?

market research

where's our niche?

positioning

positioning statement

For affluent professional parents

who want a small, academic, single-sex independent school

St Hilda's is a girls' school with 300 pupils on roll and the best GCSE results in the area.

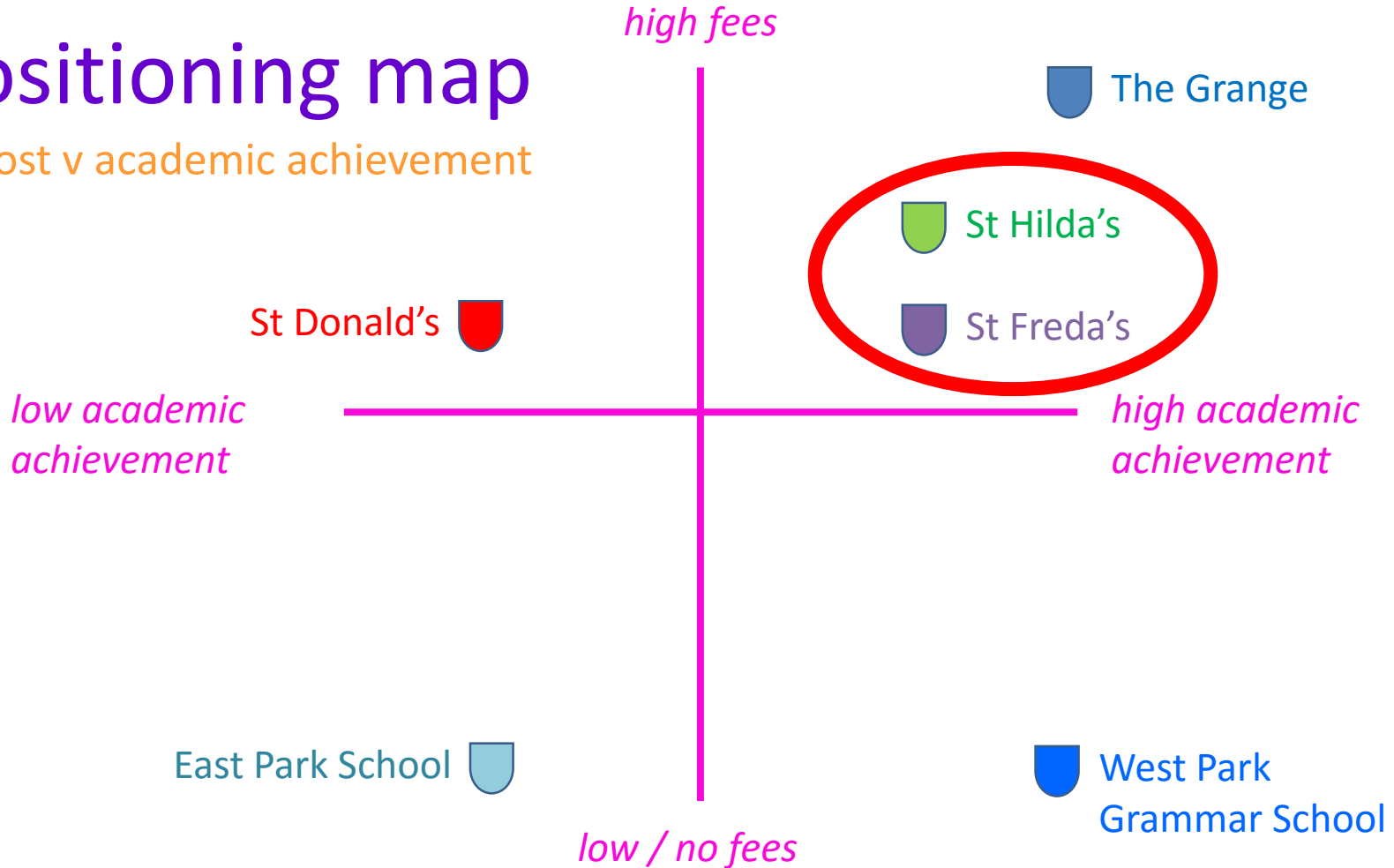
Our school is not a co-ed, 1,500-pupil school with variable academic results

Unlike St Donald's.

where's our niche?

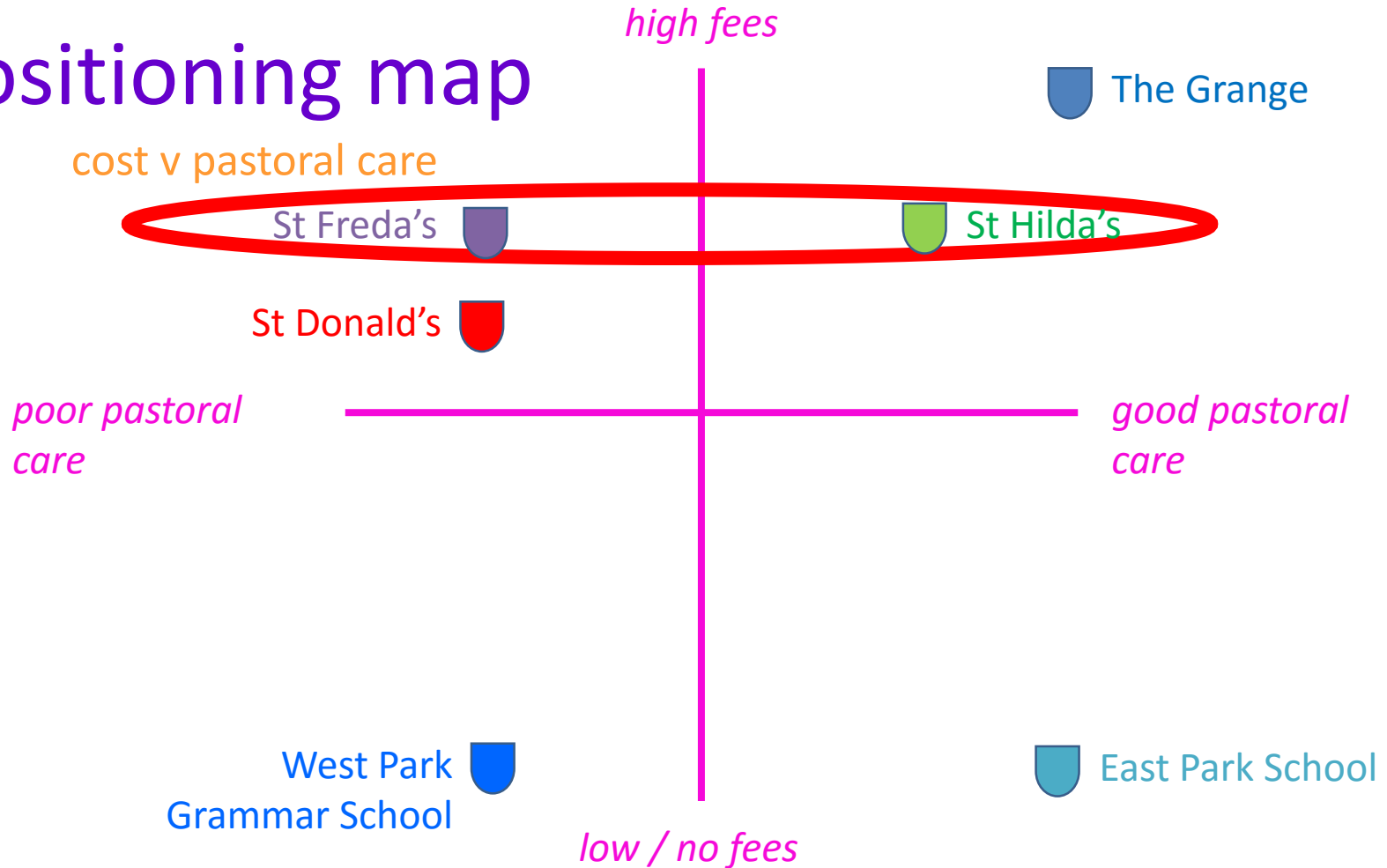
positioning map

cost v academic achievement



where's our niche?

positioning map



where's our niche?

positioning



St Hilda's
strengths?



St Donald's
weaknesses?

Any questions?