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presents...  
**INDEPENDENT**  
**EDUCATION** *live*  
2020 REPORT

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# The Future of Independent Education

*How the Covid-19 pandemic has  
impacted independent education  
and how school leaders predict the  
sector will change as a result*





“

I work in marketing, and the forced change has been incredibly positive from my perspective. Many independent schools are behind the curve in terms of online teaching, technology facilitation and encouraging young people to understand the future of technology and its impact on them. Many independent schools have a very similar offering, and the pandemic has encouraged us to think outside the box, changing not only the way we teach but the way we market ourselves. It has made us aware of the importance of being ahead of the curve and not doing things blindly”

## Foreword

At the end of 2019, Independent Education Today (IE) asked a handful of independent school leaders what they thought the dominant trends in education in 2020 would be. As well as mental health, communicating the benefits of the sector and looking at the future of full boarding, one that came up was increased engagement with edtech. Little did we know that months later a global health pandemic would hit that would mean relying on edtech to keep learning going.

The pandemic has impacted every industry, but education has arguably experienced one of the most significant transformations.

Schools moved lessons online, transformed physical environments into Covid-safe spaces and are dealing with financial pressures from all angles – it’s no wonder many in the sector are feeling the strain.

But the independent education sector and the people within it are strong: they know that we can’t turn back the clock and that all we can do is move forward. That’s why we launched a survey to gain an insight into how the independent education sector could change in the future. That way, schools can be ahead of the game. You’ll see quotes throughout this report from survey respondents on what they think those changes might be.

We surveyed 102 people in the independent school sector – some of whom were headteachers, heads of department and teachers – and discovered the following key findings:

- 43% of respondents said demand for places at their school for the 2020/21 academic year was equal to the same time last year
- 72% said their school froze fees for the 2020/21 academic year
- 59% were either slightly or very concerned about their school’s ability to keep running
- 55% said they thought the additional training they received during lockdown would be very useful in the future
- 85% thought Covid-19 would permanently change aspects of independent education
- 31% thought the changes made to exams

for 2021 were not sufficient

- 80% said their school had a plan in place for if it was forced to close again because of Covid-19

We launched this report at our first digital event, Independent Education Live (IE Live) on 4 November 2020, where we brought together school leaders to support each other and share best practice. We hope this report will help provide an insight into the shape independent education might take going forward.



Jo Golding

Editor, Independent Education Today



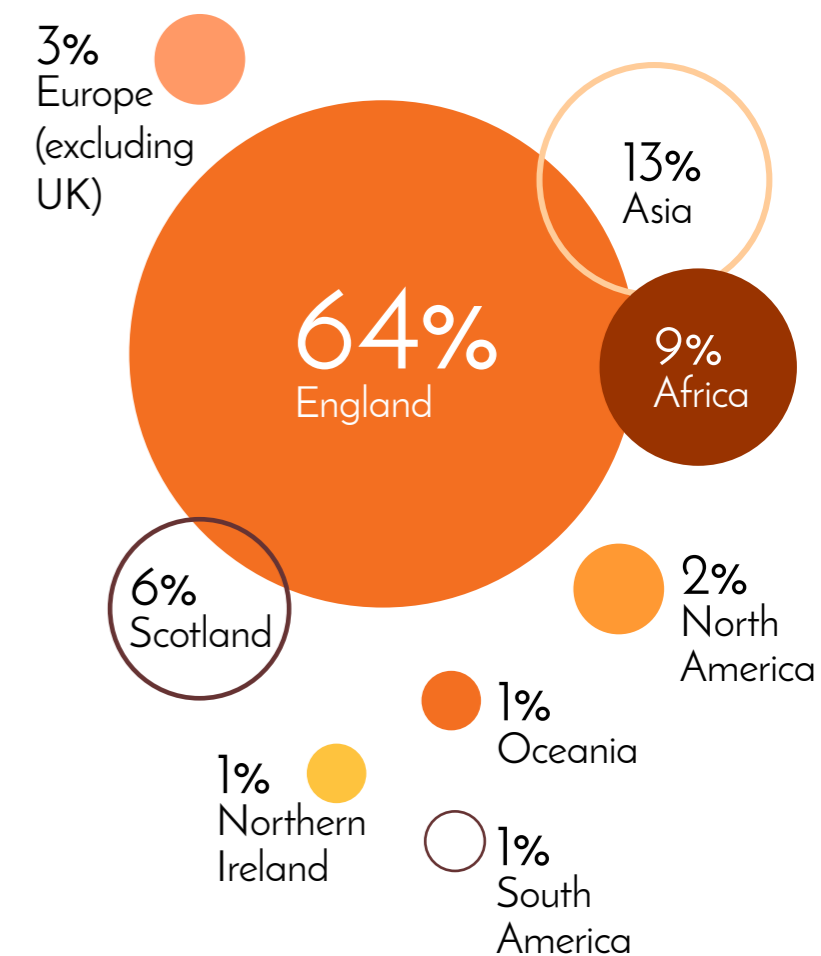
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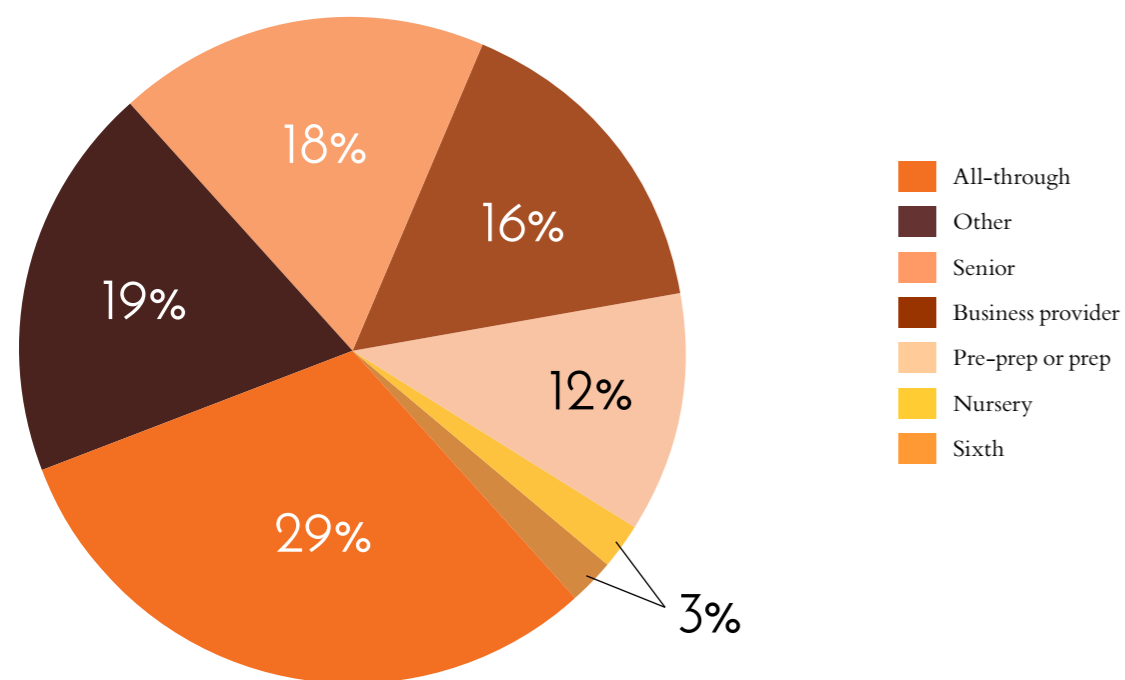
[It] forces us to consider everything we are offering and whether it is helping us or hindering us from meeting our strategic aims. Less of, “We’re doing this because we’ve always done it””



### Where is your school located?



### What type of independent school do you work for?



## The survey

After running a survey from 13 August to 24 September for headteachers and other staff in independent schools, we received 102 responses. We asked respondents what type of independent school they worked at. Twenty-nine per cent worked in an all-through school, 18% worked in a senior school, 12% worked in a pre-prep or prep school, 3% worked in a nursery and 3% worked in sixth form schools or colleges.

The majority of respondents worked in independent schools in England (64%), but we also had respondents from schools in Scotland (6%), Northern Ireland (1%) and the rest of Europe, excluding the UK (3%). Internationally, we heard from Asia (13%), Africa (9%), North America (2%), Oceania (1%) and South America (1%).

“All [educational institutions] will need to adapt teaching methods and management in anticipation of potential new disruptions in school operations in order to minimise, where possible, their impact on students and staff”

“

[The] perception of [the] UK has changed overseas, [which will have a] very negative impact on the boarding market ”



Image © depositphotos.com

## Steady demand

When we asked respondents whether they had seen a rise in demand for places at their independent school for the 2020/21 academic year, compared to the same time last year, 43% said demand had stayed the same.

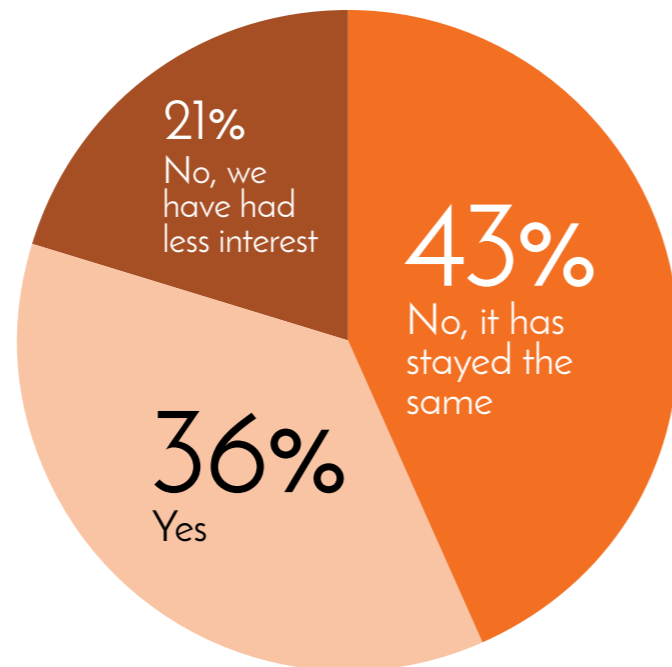
However, 36% said they had seen a rise in demand, and 21% said they'd had less interest in school places.

In July the Independent Schools Association (ISA) told the Observer that it had noticed "an upsurge" in the number of "worried" parents of state school pupils looking for private school places for September. Independent schools said parents were impressed by the full timetable of lessons they were able to provide during the lockdown period from March to June, which was not something all state schools could offer.

However, Barnaby Lenon, chairman of the Independent Schools Council (ISC), said in an interview at IE Live that there had only been a 1% decrease in the number of pupils at ISC schools, driven by less international pupils at boarding schools this year. Less interest from overseas and more interest coming from the state sector may well have balanced each other out in some cases.

It's encouraging to see that demand for places has mostly stayed the same with only a small decrease in pupil numbers, which is a better outcome than many predicted earlier this year. Of course, next year's numbers could tell a different story.

Have you seen a rise in demand for places at your school for the 2020/21 academic year compared to this time last year?



## Exam turmoil

Considering the disruption children faced in 2020 due to lockdown, it was essential to make changes to the 2021 exam series to help them. When we asked respondents whether they thought the changes made so far were sufficient, 31% of people did not think they were, whilst 21% thought they were. However, 48% of respondents weren't sure.

On 3 August Ofqual confirmed changes to GCSEs, AS and A-levels for 2021, which it said would free up teaching time, reduce pressure on students and allow assessments to be undertaken within current public health restrictions. This included changing how some content is assessed and the number of fieldwork days required in certain subjects.

Despite this, some of our survey respondents called for further alterations, including lower grade boundaries, less topics, a combination of exams and centre assessments, grades based on internal assignments, a modular approach with teacher assessments, and a general need for more consultation with headteachers.

After the government announced in October that exams would be held three weeks later in 2021 – a move which was welcomed by the sector as it would allow for more teaching time – the National Education Union called for greater optionality and fewer exams, and the Headmasters' and Headmistresses' Conference said GCSEs should be cut to "core" content.

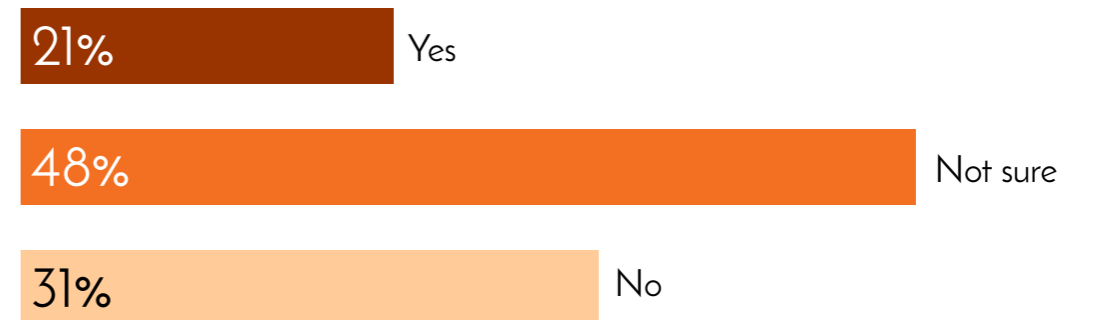
It's unsurprising that many people are unsure whether the changes made will be enough; after all, we've never had a situation quite like it. And at the time of writing this report, many questions are left unanswered – such

as what will happen with students who are ill or self-isolating when exams take place. Add the fact that the purpose of exams in the 21st century is also up for debate, and it certainly is an interesting time for exams.

“

[There will be an] even greater emphasis on wellbeing and the whole person/life skills/resilience over and above academic delivery. [This is] already a focus in the independent sector, but the lockdown has highlighted the extreme importance of this balance and view of the whole person, and I think the independent sector will choose to take this even further than it currently does (which will further the divide from the state sector, which seems to fail to properly recognise the importance of the person, not the exam score ”

Do you think the changes that been made to exams for 2021 are sufficient, considering the disruption pupils have faced?



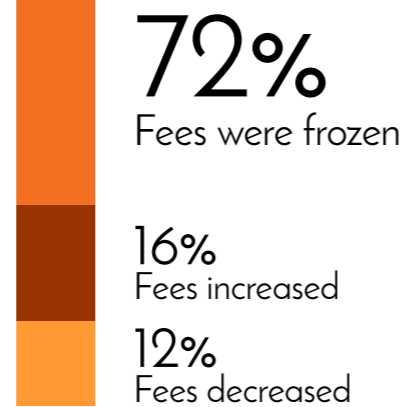
# Frozen fees

Fee affordability is an ongoing, important discussion in independent schools. Even though schools are working hard to offer more bursaries so more young people can access private education, many parents who do not qualify for bursaries are struggling against rising fees.

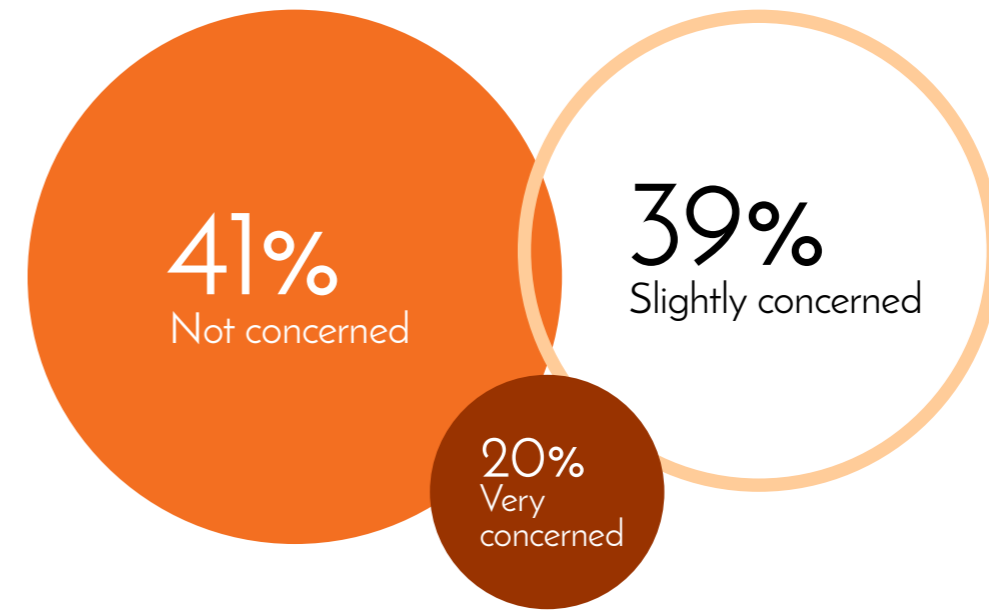
We asked respondents what happened to their school fees for the 2020/21 academic year and the majority said they had frozen their fees (72%). Sixteen per cent said their fees had increased and 12% said their fees had decreased.

It is a positive sign that so many schools were able to freeze their fees for the 2020/21 year. It's clear that helping parents who were going to struggle to pay fees due to financial pressure as a result of Covid-19 was a priority for independent schools, and they adapted their budgets accordingly. However, there was still a section of schools that continued to increase their fees for the 2020/21 year, which could be challenging for families.

What has happened to your school fees for the 2020/21 academic year?



With some schools having closed as a result of financial pressures from coronavirus, how concerned are you about your school's ability to stay open?



“Fee affordability will actively be addressed – ‘do less better’”

Woldingham School

# School uncertainty

We asked respondents whether they were concerned about their independent school's ability to stay open, considering some schools had to close as a result of financial pressures following the Covid-19 pandemic. While 41% of respondents were not concerned, 39% were slightly concerned and 20% were very concerned, which means that the majority of respondents (59%) were concerned in some way.

It's a difficult time for the sector and the closing of businesses due to financial pressures could impact families' ability to pay private school fees, which could lead to more school closures.

Barnaby Lenon of the ISC said in an interview at IE Live that 40 ISC schools had closed since March 2020 – double the usual figure – but that all of those schools were small and in financial difficulty already before the pandemic.

He said the sector would likely see more mergers in the future, especially for smaller schools needing to take action.

“I work in the international sector. I think the vulnerability of our schools has increased as clients (parents) have realised how much we depend on unrestrained international travel. Restrict that and you choke off the oxygen supply to international schools”

# Training triumph

In cases where additional training was given to school staff, we wanted to know how useful it would be in the future, e.g. training for carrying out remote education during lockdown. Fifty-five per cent of people said the training they received would be very useful in the future and 29% said it would be quite useful. Fourteen per cent did not receive any additional training and 2% said the training they did receive would not be very useful in the future.

Furthermore, a recent survey by educational software producers Renaissance showed that 65% of school leaders and teachers said they felt happier about using edtech since the pandemic.

With no guarantees that face-to-face learning will be able to go ahead continuously over the next year, with different parts of the UK facing local lockdowns, it's looking increasingly likely that a blended learning approach could provide a blueprint for the future. Therefore useful ICT training is key to equipping educators with the skills they need for the new educational landscape.

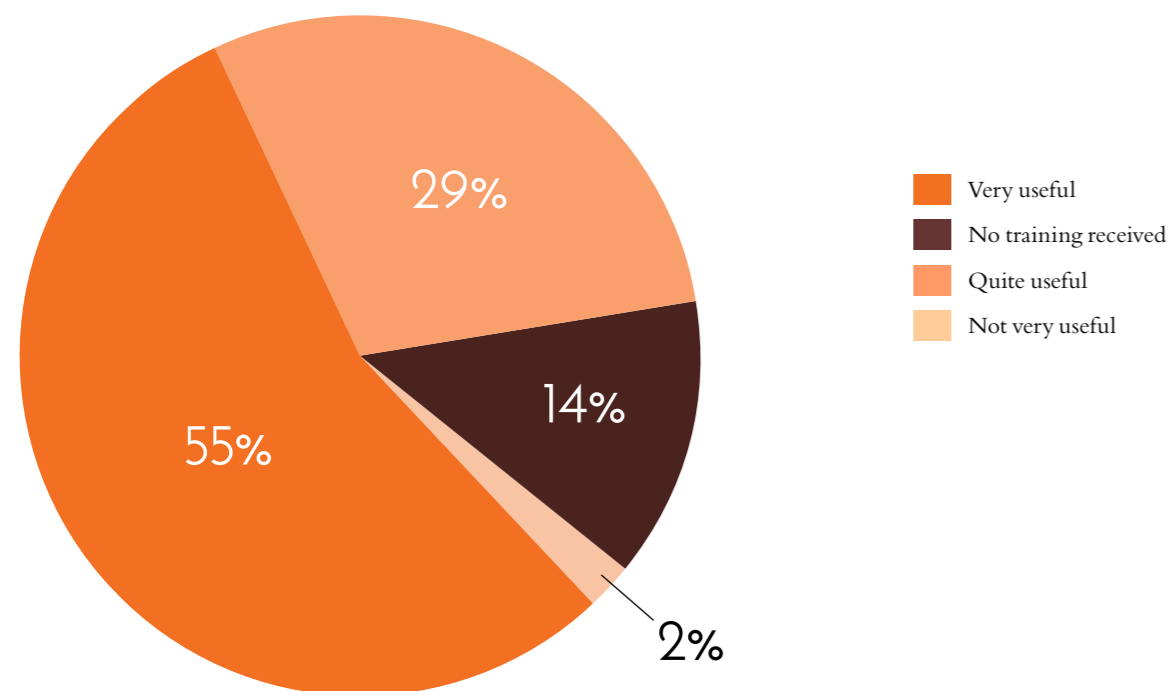
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We will want to build on the skills students have acquired that extend from their experience of greater advocacy and independence during the distance learning period. We will also want to build on teachers' skills learned during the same period”

“

We learned a lot from lockdown. We were forced to confront IT issues, innovation and the needs and anxieties of society, and therefore families and pupils have been altered in some important ways alongside wellbeing and mental health”

If you received additional training during lockdown (for example, for carrying out remote education), how useful do you think this will be in the future?



# Fail to plan...

When we asked respondents if their independent school had a plan in place for if it was forced to close again because of Covid-19, 80% said yes and only 2% said no; 18% weren't sure.

Independent schools quickly transitioned to online learning back in March and many had systems in place before the pandemic began. Therefore many schools are confident that should they have to close at any point, they have secure plans in place to ensure continuous learning.

This forward planning is essential, especially for schools in the North of England; the BBC reported that in mid-October Bury, Knowsley, Liverpool and Manchester all had more than 40% of schools with confirmed Covid-19 cases, which was resulting in many children having to self-isolate.

Does your school have a plan in place for if it is forced to close again due to coronavirus?

80% Yes

18% Not sure

2% No

“

I think many [parents] will look to country schools out of London as a preference as parents' jobs and roles change as more and more work from home ”



# The future

Most respondents (85%) thought Covid-19 would permanently change aspects of independent education, and only 2% disagreed. Thirteen per cent of people weren't sure.

We asked respondents to elaborate on what they thought would change or why they didn't think there would be changes.

Some of those who thought the pandemic would not permanently change independent education said it would depend on the length of school closures, when a vaccine is developed, the length of time Covid-19 is in the community and whether the exam timetable is moved. One respondent said there was a "fear of change" in the sector, and another said things won't change much unless there is a "fundamental change in the way we assess children".

We received many responses on what aspects of independent education would permanently change due to the pandemic. Some of the answers have been summarised below:

#### TECHNOLOGY:

- Using technology to deliver the curriculum
- Blended/hybrid learning
- Remote/distance learning
- Better technology skills for staff and pupils
- Use of digital devices in classrooms
- All lessons to be recorded

- Monitoring of screen time
- Teachers to train in teaching online as part of professional development

#### INTERNATIONAL:

- A more vulnerable sector due to restricted international travel, resulting in fewer international children enrolling
- Greater awareness of the fragility of the overseas market
- Negative impact on boarding due to a different perception overseas of the UK
- Refinement of overseas recruitment

#### SCHOOL LIFE:

- Better parent-teacher interaction
- Pupils will become more independent
- Sustainability is appreciated more
- Fee affordability will be actively addressed
- Co-curricular programmes will become stronger
- Able to engage learners who felt uncomfortable in traditional settings
- Highlighted the importance of how schools must stand out
- Greater transparency around operational issues
- Even greater emphasis on wellbeing and educating the whole person
- More parents looking at schools in the countryside
- Exams and assessment approaches

Do you think the pandemic will permanently change any aspects of independent education?

85%

Yes

13%

Not sure

2% No



Ashford School

# Conclusion

Of course, we don't know exactly where the sector will go from here as we won't know the impact of many changes that have occurred for some time. But our survey respondents remained quite optimistic, citing positive changes that have come out of the pandemic. These included better awareness of sustainability, improved parent-teacher interaction and better technology skills, as well as greater emphasis on educating the whole child, rather than focusing solely on exam results.

What will need monitoring closely is the sector's international relationships and maintaining the UK's reputation for high-quality independent schools. Working harder to attract international pupils could be on the cards. Despite the challenges ahead, the independent education sector remains strong, with good demand and schools that continue to innovate. Even though things will never go back to exactly the way they were before Covid-19, it's clear the sector will move forward optimistically to continue to give children the best educational experience they can.

*Thank you to all those who participated in our survey*

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