

Study on the Provision of International School Places in Hong Kong

Report

Policy 21 Limited

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Annex: Summary on the findings concerning Private Independent Schools (PISs)

Chapter 1 Introduction

1.1 Introduction

- 1.1.1 The first report of the Study on the Provision of International School Places in Primary and Secondary Levels in Hong Kong was completed in end-2012 (the 2012 Study). It was projected that based on the position of the 2011/12 school year, there would be a shortfall of about 4 200 international school places at primary level by the 2016/17 school year.
- 1.1.2 To meet the projected shortfall, the Education Bureau (EDB) has allocated a number of vacant school premises and greenfield sites in the past few years for development of international schools. Based on the proposal submitted by the schools concerned, some 6 000 international primary and secondary school places will be gradually provided from the 2014/15 school year.
- 1.1.3 EDB commissioned the Policy 21 Limited (Policy 21) to conduct a new round of study (the current Study) to stocktake the latest position of the provision of international school places (i.e. situation of the 2015/16 school year), and to make projections on the demand and support of such school places in the coming seven school years, from 2016/17 to 2022/23 (all similar expression in this report refers to the relevant school year).

1.2 Study objectives

- 1.2.1 The objectives of the current Study are as follows:
- (a) to stocktake the latest position in terms of the number of international school places (with breakdown by the English Schools Foundation (ESF) and other international schools) at the primary and secondary levels in Hong Kong in 2015/16;
 - (b) to study the nature of demand (including un-met demand) for international school places (with breakdown by ESF and other international schools) with a view to updating the 2012 Study by projecting demand for the seven school years from 2016/17 to 2022/23;
 - (c) to examine the nature of supply of international school places (with breakdown by ESF and other international schools) with a view to projecting such supply for the seven school years from 2016/17 to 2022/23;

- (d) to assess the adequacy of international school places (with breakdown by ESF and other international schools) for the seven school years from 2016/17 to 2022/23 and facilitate a review of support measures required; and
- (e) to collect information on the provision of special education services in international schools.

1.3 Definition of International School Places

1.3.1 Under the 2012 Study, Policy 21 has collected data and information from ESF schools, other international schools and Private Independent Schools (PISs) when stocktaking the provision of international school places. Since PISs offering non-local curriculum classes, though admitting non-local students, are primarily for admitting local students¹, they are excluded from the analysis under the current Study. In this report, “international school places” are defined as places offered by ESF schools and other schools recognised by EDB as international schools. Readers should exercise caution in comparing findings from the current Study and the 2012 Study. Findings related to PISs are separately set out in the Annex of this report for reference.

1.3.2 There are a total of 51 international schools, comprising 15 schools operated by ESF (including a special school) and 36 other international schools in 2015/16.

¹ Local students refer to those who are Hong Kong permanent residents (with the right of abode in Hong Kong Special Administrative Region) and do not have any passports other than the HKSAR Passport or the British National (Overseas) Passport. According to EDB’s policy, PISs are required to admit primarily local students, which should constitute at least 70% of the overall student population.

Chapter 2 Study Methodology

2.1 Introduction

2.1.1 Under the current Study, Policy 21 had conducted a school survey and a business survey to collect quantitative data, as well as supplementary in-depth interviews with stakeholders to collect qualitative data.

2.2 School survey and Parent survey

2.2.1 The school survey comprises a questionnaire for all international schools, and a questionnaire for parents. The purpose of the school questionnaire is to collect information from international schools on their admission policies, plans (if any) for expanding current provisions and problems faced, and views on support measures from the Government. The parent questionnaire, on the other hand, aimed to collect information on views and preferences of parents of children with or without special educational needs (SEN). Since SEN children account for a very small proportion among all students in international schools, a special sample design was adopted with a view to collecting adequate sample size of SEN students for analysis.

2.2.2 A total of 35 international schools (including 14 ESF schools) and 454 parents (involving 14 schools) completed the school and parent questionnaire, representing a response rate of 73.9%² and 84.7% respectively. Among 454 parents who had completed the parent questionnaire, 85 reported that they had SEN children with 78 of them completed the parent questionnaires with additional questions on SEN. In-depth interviews were conducted with principals of nine international schools. In addition, two focus group discussions with a total of 17 parents were conducted.

² In the calculation of response rate, international schools under the same name are counted as one reporting unit. For example, German Swiss International School (English) and German Swiss International School (German) are counted as one reporting unit instead of two, giving 34 out of a total of 46 reporting units (involving 51 international schools) and a response rate of 73.9%.

2.3 Business survey

- 2.3.1 As there is no readily available information on the potential demand from expatriates who are or will be employed by establishments in Hong Kong, the business survey, targeting organisations that are likely to be employing or will employ expatriates, helps bridge the data gap. This approach is the same as that adopted in the 2012 Study.
- 2.3.2 The business survey covered a sample of 5 800 business establishments, of which 3 077 establishments were successfully enumerated. After excluding 720 establishments found to have been closed or moved, the response rate was 60.6%. In addition, a total of 12 in-depth interviews with representatives of three consulates, the European Union Office to Hong Kong and Macau, five large business establishments and three chambers of commerce were conducted.

Chapter 3 Stocktaking Provision of International School Places³

3.1 Introduction

3.1.1 Enrolment in international primary schools increased from 17 614 in 2006/07 to 20 439 in 2015/16, whereas total enrolment in all types of ordinary primary schools dropped from 410 516 in 2006/07 to 337 558 in 2015/16. As to international secondary schools, enrolment increased from 13 636 in 2006/07 to 16 530 in 2015/16, while total secondary enrolment in ordinary schools decreased from 484 195 in 2006/07 to 352 609 in 2015/16.

3.2 Primary schools

3.2.1 In 2015/16, there were 6 120 and 16 310 primary school places provided in schools operated by ESF and other international schools respectively.

Chart 3.1: Provision of primary school places in schools operated by ESF and other international schools from 2006/07 to 2015/16



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

3.2.2 Based on the number of school places provided and the actual enrolment data, the percentages of provision taken up at the primary level in ESF and other international schools were 99.1% and 88.1% respectively in 2015/16.

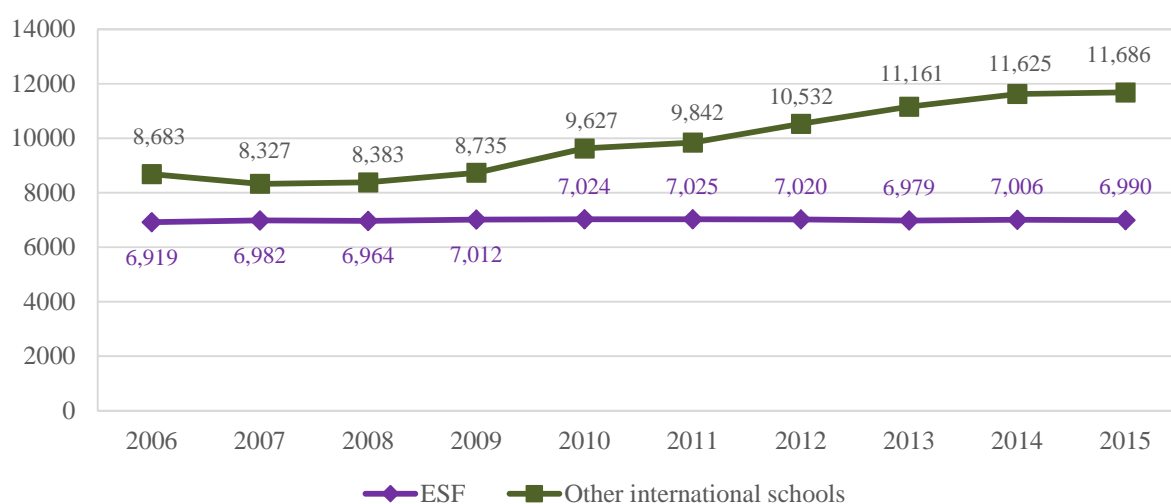
³ Figures in this Chapter do not include those of the ESF special school.

3.2.3 In 2015/16, there were 204 and 667 operating classes at the primary level in ESF and other international schools respectively. The average class size was 30 for ESF schools and 22 for other international schools.

3.3 Secondary schools

3.3.1 In 2015/16, there were 6 990 and 11 686 secondary school places provided respectively in schools operated by ESF and other international schools.

Chart 3.2: Provision of secondary school places in schools operated by ESF and other international schools from 2006/07 to 2015/16



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

3.3.2 Based on the number of school places provided and the actual enrolment data, the percentages of provision taken up at the secondary level in ESF and other international schools are 96.7% and 83.6% respectively in 2015/16. One of the reasons for the relatively lower percentage pertaining to “other international schools” is the net outflows of local and non-local students to pursue study overseas, particularly at upper grades.

3.3.3 In 2015/16, there were 243 and 494 operating classes at the secondary level in ESF and other international schools respectively. The average class size was 28 for ESF schools and 20 for other international schools.

3.4 Geographical distribution: School places

3.4.1 In 2015/16, 58.2% of the international school places regardless of school level were on the Hong Kong Island, whereas 22.5% and 19.3% were in Kowloon and the New Territories respectively.

3.4.2 At the primary level, 53.2% of the international school places were on the Hong Kong Island, while 23.6% and 23.2% were in Kowloon and the New Territories respectively. The number of operating classes at the primary level has a reasonably similar geographical distribution, with 54.2% on the Hong Kong Island, 23.8% in Kowloon and 22.0% in the New Territories.

Table 3.1: Geographical distribution of international school places at the primary level in 2015/16

District	Number of places		Number of operating classes		Number of students	
	Hong Kong Island	11 929	53.2%	472	54.2%	10 855
Kowloon	5 293	23.6%	207	23.8%	4 930	24.1%
New Territories	5 208	23.2%	192	22.0%	4 654	22.8%
Total	22 430	100.0%	871	100.0%	20 439	100.0%

3.4.3 At the secondary level, 64.2% of the international school places were on the Hong Kong Island, while 21.2% and 14.6% were in Kowloon and the New Territories respectively. The number of operating classes at the secondary level has a reasonably similar geographical distribution, with 62.1% on the Hong Kong Island, 21.2% in Kowloon and 16.7% in the New Territories.

Table 3.2: Geographical distribution of international school places at the secondary level in 2015/16

District	Number of places		Number of operating classes		Number of students	
	Hong Kong Island	11 988	64.2%	458	62.1%	10 521
Kowloon	3 954	21.2%	156	21.2%	3 518	21.3%
New Territories	2 734	14.6%	123	16.7%	2 491	15.1%
Total	18 676	100.0%	737	100.0%	16 530	100.0%

3.4.4 There are variations between districts in the percentage of places taken up and the average class size. The percentage of international school places taken up is slightly higher in Kowloon at the primary level and in the New Territories at the secondary level. The average class size, on the other hand, is higher at 24.2 for schools in the New

Territories at the primary level while at a lower level of 20.3 for schools in the New Territories at the secondary level.

Table 3.3: Percentage of international school places taken up and the average class size in 2015/16

District	% of places taken up		Average class size	
	Primary	Secondary	Primary	Secondary
Hong Kong Island	91.0%	87.8%	23.0	23.0
Kowloon	93.1%	89.0%	23.8	22.6
New Territories	89.4%	91.1%	24.2	20.3
Total	91.1%	88.5%	23.5	22.4

3.5 Geographical distribution: Place of residence of students

3.5.1 When comparing the geographical distribution of school places and place of residence of students⁴ at the primary level, it is noted that percentages of students who are living and studying in the same catchment area in the Hong Kong Island, Kowloon and the New Territories are 55%, 47% and 74% respectively (see Table 3.4 below).

Table 3.4: Percentage distribution of international school places taken up at the primary level by areas of residence of students in 2015/16

Location of schools	% distribution by areas of residence of students				
	Hong Kong Island	Kowloon	New Territories	Unknown ⁵	All districts
Hong Kong Island	55%	3%	4%	38%	100%
Kowloon	12%	47%	30%	11%	100%
New Territories	2%	13%	74%	11%	100%
Overall	33%	16%	26%	25%	100%

3.5.2 The distribution of the place of residence⁶ among international school students at the secondary level is similar to that at the primary level. Percentages of students who are living and studying in the same catchment area in the Hong Kong Island, Kowloon and New Territories are 48%, 44% and 71% respectively (see Table 3.5 below).

Table 3.5: Percentage distribution of international school places taken up at secondary level by areas of residence of students in 2015/16

Location of schools	% distribution by areas of residence of students				
	Hong Kong Island	Kowloon	New Territories	Unknown ⁷	All districts
Hong Kong Island	48%	7%	10%	35%	100%
Kowloon	13%	44%	33%	10%	100%

⁴ Residential information in respect of 25.3% of the international primary school students is not available.

⁵ Caution should be taken in interpreting the above figures owing to high proportions of unknown cases.

⁶ Residential information in respect of 27.6% of secondary students is not available.

⁷ Caution should be taken in interpreting the above figures owing to significant proportions of unknown cases.

Location of schools	% distribution by areas of residence of students				
	Hong Kong Island	Kowloon	New Territories	Unknown ⁷	All districts
New Territories	3%	4%	71%	22%	100%
Overall	34%	14%	24%	28%	100%

3.5.3 The above shows that the provision of international school places at both primary and secondary levels does not completely correspond to the area of residence of students. Some parents choose to send their children to attend schools they prefer even though these schools are located relatively far away from their places of residence. However, there are indications that there is a shortage of international school places in the New Territories. This may be demonstrated by comparing total enrolment by the location of schools with the number of students by the area of their residence (see Table 3.6 below). Despite that most of the students attend international schools on the Hong Kong Island (57.8%), only 33.2% of all international school students reside on the Hong Kong Island. The proportion of students residing in the New Territories (about 25%) is higher than that enrolled in schools in the same area (around 19%). With the ongoing development of a new international school campus in Kowloon, and four new international school campuses in the New Territories, it is expected that the shortage of international school places in the New Territories will be relieved upon their commencement of operation in the period between 2016/17 and 2018/19.

Table 3.6: The number of students by location of international schools with the number of students by the location of their residence in 2015/16

Area	Number of students	
	By location of schools (% to total)	By area of residence (% to total)
Hong Kong Island	21 376 (57.8%)	12 264 (33.2%)
Kowloon	8 448 (22.9%)	5 582 (15.1%)
New Territories	7 145 (19.3%)	9 393 (25.4%)
Unknown	-	9 730 (26.3%)
Total	36 969	36 969

3.6 Comparison between projected figures from the 2012 Study and actual figures

3.6.1 The 2012 Study projected that the demand for primary school places at ESF schools, other international schools and PISs as a whole for 2016/17 would be 32 648 and with the projected supply of 28 445 places, there would be a shortfall of some 4 200 primary school places in 2016/17. A comparison of the projected and the actual figures of 2015/16 is set out in Table 3.7 below.

Table 3.7: Comparison between projected demand for primary school places in ESF schools, other international schools and PISs under the 2012 Study and actual number of students of 2015/16

	Projected demand of 2015/16 under the 2012 Study (a)	Actual number of students of 2015/16 (b)	Difference (c) = (b) –(a)
Local students	8 173	8 768	+595
Non-local students	19 935	18 415	-1 520
Waiting List [#]	3 232	2 172	-1 060
Total	31 340	29 355	-1 985

[#] Adjusted taking into account the estimated number of applications that might be submitted for the same student and the estimated number of waiting list applicants who were subsequently admitted.

3.6.2 The comparison shows that the actual demand (including the “unmet” demand as shown by the adjusted number of applicants on the waiting lists kept by schools) is less than that projected under the 2012 Study, mainly attributed to a smaller number of enrolled non-local students and a shorter waiting list. On the other hand, the actual number of enrolled local students is slightly higher than the corresponding projected figure.

3.6.3 On the supply side, the latest estimate indicates that the number of primary school places of ESF schools, other international schools and PISs would increase by 3 807 from 2011/12 to 2016/17, being some 1 600 higher than the corresponding increase of 2 177 as projected under the 2012 Study, underpinning the efforts of the Government in meeting the projected demand by promoting the development of international schools through allocation of greenfield sites and vacant school premises and facilitating in-situ expansion of existing schools in the past few years.

3.6.4 Based on the latest estimation, there would only be an insignificant shortfall in places of ESF, other international schools and PISs in 2016/17, and the trend of increase in non-local students would not be as sharp as projected under the 2012 Study.

Chapter 4 Findings from the School Survey

4.1 Introduction

4.1.1 Under the school survey, completed questionnaires were collected from 35 international schools (including the special school under ESF). Of the schools enumerated, 40% were ESF schools, 60% were other international schools. And, 40% of them provided both primary and secondary education, 40% provided primary education only and 20% provided secondary education only. It should be noted that the survey findings set out in the ensuing paragraphs only represent those having responded to the survey.

4.2 School admission mechanism

4.2.1 The majority of the enumerated schools (94.3%) indicated that they had accorded priority to applicants with siblings studying in their schools. 60.0% of the schools indicated that they had accorded priority to applicants whose parents were holders of debentures / nomination rights. 82.9% of the schools stated that they had accorded priority to other categories, such as children of alumni and children of staff (44.8% respectively).

4.2.2 85.7% of the enumerated schools indicated that they kept waiting list for applications for admission. Among them, 80.0% included all applicants considered qualified for admission on the waiting list, and 10.0% placed only applicants who were likely to have a chance of admission during the same school year on the waiting list. As regards the wait-listing arrangements, 26.7% accorded priority based on the “first come first serve” principle, while another 26.7% had different arrangements for different grades, e.g. the priority of applicants for Primary (P) 1 and Secondary (S) 1 on the waiting list was based on the random number assigned whereas the priority of applicants for other grades on the waiting list was based on the “first come first serve” principle.

4.2.3 About 82.9% of the enumerated schools reported that they enrolled students from their waiting list whereas 17.1% did not. The breakdown by levels and types of schools for the average percentage of students placed on the waiting lists who were subsequently admitted by the schools is appended in Table 4.1 below.

Table 4.1: Average % of students placed on the waiting lists kept by schools who were subsequently admitted by the schools by school types

Types of schools	Average % of students placed on the waiting lists who were subsequently admitted	
	Children attending primary schools	Children attending secondary schools
ESF schools	26.1%	37.2%
Other international schools	35.0%	40.3%

4.3 Future provision of school places

4.3.1 The coming seven years' plan (i.e. 2016/17 to 2022/23) for adjustment to provision of places was sought from the enumerated schools. About 51.4% of schools indicated that they did not have plan to change their provision of places in the coming seven years whereas 48.6% indicated that they had plans to do so. Among those schools having such plans, the measures to be adopted were mainly "in-situ expansion in existing school site" (47.1% of the schools with such plans), "applying for allocation of vacant school premises" (47.1%) and "converting the use of some existing classrooms / special rooms" (29.4%).

4.3.2 Views on the support measures from Government in the course of school expansion / redevelopment / relocation were sought from schools. About 85.7% of the enumerated schools considered the support measure in expediting the procedures required in school expansion from Government very helpful or helpful. Regardless of the location, 77.1% of the schools considered the support measure of "allocation of greenfield sites / vacant school premises" useful, with most schools preferring sites/premises on the Hong Kong Island, with those in Kowloon and the New Territories follow. Relevant findings are shown in Table 4.2 below. Schools' views were also sought on the helpfulness of the support measures from the Government to new operators in enhancing their understanding in the school development and operation requirements in Hong Kong. Regarding other potential support measures that the Government may consider, the majority of the schools considered the support measure of "organising briefing sessions with regard to requirements on school development/operation" (85.7%), "facilitating communication among schools, district councils and local communities" (82.9%) and "facilitating sharing of experience among international schools in Hong Kong" (74.3%) from the Government very helpful or helpful.

Table 4.2: Schools' view on the helpfulness of the support measures from Government

<i>Support measures from Government that were considered very helpful or helpful</i>	% of schools concerned
Expediting the procedure required in school expansion from Government	85.7%
Provision of capital loan for the construction of the school premises	74.3%
Allocation of greenfield sites / vacant school premises on the Hong Kong Island	68.6%
Allocation of greenfield sites / vacant school premises in Kowloon	54.3%
Allocation of greenfield sites / vacant school premises in the New Territories	48.6%

Note: Schools may choose more than one option for the question concerned and hence the percentages above do not add up to 100%.

Chapter 5 Findings from the Parent Survey

5.1 Introduction

5.1.1 The parent survey was conducted on parents with children studying in international schools. A total of 454 parents were enumerated, with 62.3% of them being parents with students studying in ESF schools. The corresponding percentage is 37.7% for other international schools. The findings have been grossed up statistically to represent views from parents with students studying in international schools.

5.2 Parents' preference for types of schools

5.2.1 Parents' preferences (expressed as percentage of parents indicating that they highly preferred or preferred) for different types of schools (including government and aided schools, schools under Direct Subsidy Scheme (DSS), ESF schools and other international schools, and PISs) for their children were collated. The great majority (89.1%) of the parents of children studying in ESF or other international schools preferred the types of schools that their children were studying in, regardless of school level.

5.2.2 Among schools other than ESF and other international schools, more than half of the parents with local children studying in mainstream ESF schools or other international schools highly preferred or preferred PISs offering non-local curriculum (51.4% for parents with children studying in ESF schools, 63.8% for parents with children studying in other international schools) while the percentages for parents with non-local children studying in ESF schools and other international schools are 45.7% and 64.1% respectively. This indicates that PISs is a popular alternative to ESF and other international schools especially for parents with local children. On the other hand, schools under DSS, private schools offering non-local curriculum and local government or aided schools are less preferred (for parents of local or non-local students).

5.3 Application process

Average processing time taken from submission of application to successful admission

5.3.1 It took about 6.50 months on average from submission of applications to successful admission to international primary schools while that for the ESF special school was 17.30 months. For secondary schools, the average time in question was 5.41 months while that for the ESF special school was 14.20 months. Relevant findings are shown in Table 5.1 below.

Table 5.1: Average processing time (months) taken from submission of applications to successful admission analysed by the school types that the children were attending

		Average processing time (months)	
		Primary	Secondary
Children attending	ESF special school	17.30	14.20
	ESF mainstream schools	7.61	5.37
	Other International schools	6.02	5.40
	All schools	6.50	5.41
	All schools (excluding the ESF special school)	6.48	5.39
Children as	Local Students	5.65	6.75
	Non-local students	6.79	5.16
	Local Students (excluding those of ESF special school)	5.65	6.75
	Non-local Students (excluding those of the ESF special school)	6.78	5.13

5.3.2 The average time taken from submission of applications to successful admission to the ESF special school was much longer than other international schools, including mainstream ESF schools. For admission to the ESF special school, the average processing time for local students was 10.00 months while that for non-local students was 16.12 months (see Table 5.2 below). It is noted from ESF that the waiting list is ordered according to the priority criteria set by ESF, which have nothing to do with the students' residency status, and the application date. The duration of the processing time should in principle be the same no matter the applicant is a local or non-local student.

Table 5.2: Average processing time (months) taken by the ESF special school students from submission of applications to successful admission analysed by residency status

		Average processing time (months)
Children as	Local Students	10.00
	Non-local students	16.12

Average number of applications submitted

5.3.3 On average, including the schools in which their children were currently studying, parents with children at primary level indicated that they had applied for 2.33 schools at the time of admission and that for secondary level was 2.00 schools. If only applications that were subsequently placed on the waiting lists are counted (i.e. excluding the schools in which their children were currently studying at), the average number of schools applied for was 1.95 at the primary level and 1.80 at the secondary level. Relevant findings are shown in Table 5.3 below.

Table 5.3: Average number of application analysed by the school types the children were attending

Children attending	Average number of applications made at the time of admission (including the school in which their children were studying)		Average number of applications made after removing those made to other schools but not placed on the waiting list (excluding the school in which their children were studying)	
	Primary	Secondary	Primary	Secondary
ESF special school	2.33	4.00	2.00	2.00
ESF mainstream schools	2.14	1.42	1.55	1.00
Other international schools	2.41	2.24	2.10	1.81
All schools	2.33	2.00	1.95	1.80

Difficulties encountered in finding international school places

5.3.4 The difficulties encountered by parents in finding international school places for their children are shown in Table 5.4 below.

Table 5.4: % of parents encountering difficulties in finding international school places analysed by the types of schools the children were attending

Difficulties/problems encountered	Parents with children attending primary schools			Parents with children attending secondary schools		
	ESF mainstream schools	ESF special school	Other int'l schools	ESF mainstream schools	ESF special school	Other int'l schools
Waiting time for international schools I prefer is too long	32.7%	45.5%	48.4%	28.8%	36.4%	29.6%
International schools I prefer are located too far from our place of residence	14.7%	27.3%	26.7%	9.2%	18.2%	16.7%
It is difficult for the children to get admitted to international schools early in advance before my family members come to Hong Kong	18.5%	9.1%	30.4%	8.4%	9.1%	25.2%
Much time is required in applying for several international schools in order to increase the chance of being admitted into international schools	29.1%	9.1%	39.5%	12.0%	0.0%	33.4%
Little information is available on the quality of teaching in different international schools	11.4%	0.0%	23.8%	13.4%	0.0%	20.6%
Some schools do not provide services for students with SEN ⁸	5.6%	81.8%	5.1%	1.1%	72.7%	3.0%
Some schools do not have sufficient facilities for students with SEN ⁸	4.6%	72.7%	1.9%	1.9%	54.5%	0.0%
Other problems ⁹	7.1%	9.1%	10.6%	7.1%	9.1%	6.7%
No problem has been encountered	37.9%	9.1%	24.2%	37.5%	27.3%	36.6%

Note: Parents may choose more than one option for the question concerned and hence the percentages above do not add up to 100%.

⁸ This entry reflects response provided by parents with SEN children only.

⁹ Other problems include affordability, fierce competition and unclear interview details.

5.4 Parents' preference for types of curriculum

5.4.1 For both primary and secondary education, parents (including those with children currently studying in the ESF special school) indicated that the quality of teaching staff was the most important factor affecting their choice of schools, regardless of school types and residency status of their children. Table 5.5 below shows parents' perceived importance of factors affecting choice of school, with breakdown by local and non-local students.

Table 5.5: % of parents by perceived importance of factors affecting choice of school

Factors		% giving the score of							Total*	Mean score
		1	2	3	4	5	6	7		
		Most important ←			→ Least important					
Location	Local	1.6	4.8	4.1	27.9	30.8	30.9	0.0	100	4.7
	Non-local	6.2	5.6	16.4	18.1	32.2	19.1	2.4	100	4.3
	Total	5.3	5.5	14.0	20.3	31.8	21.2	1.9	100	4.4
Curriculum	Local	34.1	19.9	19.6	17.2	6.8	2.4	0.0	100	2.5
	Non-local	31.4	26.0	25.2	10.5	6.8	0.2	0.0	100	2.4
	Total	31.7	24.7	24.5	11.7	6.7	0.6	0.0	100	2.4
Quality of teaching staff	Local	28.8	30.5	25.5	11.5	2.4	1.5	0.0	100	2.3
	Non-local	36.2	37.4	11.9	8.4	4.8	1.2	0.1	100	2.1
	Total	35.2	35.9	14.4	8.9	4.3	1.2	0.1	100	2.2
Reputation	Local	19.6	25.1	23.4	14.4	10.7	6.5	0.4	100	2.9
	Non-local	15.7	12.3	24.1	23.0	17.3	7.1	0.5	100	3.4
	Total	16.4	15.1	23.9	21.2	16.0	6.9	0.5	100	3.3
Prospect of graduates	Local	10.4	15.3	14.3	23.3	17.6	17.2	1.9	100	3.8
	Non-local	3.8	7.4	16.1	22.5	25.2	21.2	3.7	100	4.4
	Total	5.0	8.8	15.7	22.6	23.7	20.8	3.3	100	4.3
Tuition fee	Local	5.2	4.5	10.3	5.4	30.4	41.5	2.7	100	4.9
	Non-local	3.5	9.0	6.1	16.8	13.5	48.9	2.3	100	4.8
	Total	3.8	8.1	6.8	14.6	17.0	47.3	2.3	100	4.8

*Rounded to the nearest integer. For a particular factor, those parents without indicating ranking are excluded.

5.4.2 Furthermore, when parents were more specifically asked about the reasons for sending their children to international schools, regardless of whether their children are SEN or non-SEN children, the main reasons include “more flexible/interactive learning in international school”, “better bridging to education systems overseas”, “more relaxed

learning environment and less study pressure in international school” and “language barrier, cannot cope with local curriculum”. When taking a further look of the findings analysed by the residency status of the children, while “more flexible/interactive learning in international school” is commonly shared by both parents with local and non-local children, “language barrier, cannot cope with local curriculum” is more commonly shared by parents of non-local children than local children. An analysis of the reasons of parents choosing international schools is shown at Table 5.6 below.

Table 5.6: Reasons for parents to send their children to study at international schools (Multiple Responses)

Reasons		Parents with non-SEN children			Parents with SEN children			
		Mainstream (ESF and other international schools)		All	ESF special school	Mainstream (ESF and other international schools)		All
		Primary	Secondary			Primary	Secondary	
More flexible/interactive learning in international school	Local	96.0%	94.4%	95.4%	61.5%	100.0%	100.0%	98.7%
	Non-local	71.2%	64.5%	68.0%	47.9%	70.0%	66.7%	67.0%
	Total	76.8%	69.2%	73.4%	49.9%	75.5%	77.3%	72.5%
Better bridging to education systems overseas	Local	62.2%	56.0%	59.9%	0.0%	31.6%	37.6%	34.4%
	Non-local	70.3%	57.8%	64.5%	15.9%	60.2%	50.9%	52.9%
	Total	69.0%	57.5%	63.9%	13.6%	54.9%	46.7%	53.7%
More relaxed learning environment and less study pressure in international school	Local	90.7%	76.8%	85.4%	0.0%	100.0%	68.8%	76.4%
	Non-local	60.8%	46.6%	54.2%	40.0%	61.6%	40.6%	50.5%
	Total	67.3%	51.3%	60.2%	34.1%	68.7%	49.6%	51.8%
Language barrier, cannot cope with local curriculum	Local	13.3%	23.2%	17.1%	22.9%	37.3%	31.2%	32.9%
	Non-local	67.5%	53.7%	61.0%	69.3%	71.3%	66.7%	69.0%
	Total	55.5%	48.9%	52.5%	62.4%	65.0%	55.3%	65.2%
Quality of learning and teaching is better in international school	Local	74.8%	52.0%	66.1%	61.5%	50.5%	62.4%	58.4%
	Non-local	52.7%	46.6%	49.9%	19.1%	53.2%	49.8%	49.4%
	Total	57.0%	47.5%	52.7%	26.1%	52.6%	53.8%	47.9%

Reasons		Parents with non-SEN children			Parents with SEN children			
		Mainstream (ESF and other international schools)		All	ESF special school	Mainstream (ESF and other international schools)		All
		Primary	Secondary			Primary	Secondary	
Improve my child's proficiency in English	Local	60.9%	54.4%	58.4%	38.5%	50.0%	68.8%	61.8%
	Non-local	27.5%	23.9%	25.8%	22.6%	14.8%	37.5%	25.8%
	Total	34.8%	28.7%	32.1%	25.0%	21.3%	47.5%	37.5%
Non-local students cannot be admitted to local schools *	Non-local	11.0%	10.5%	10.8%	0.0%	6.2%	12.6%	8.8%

*This option is only applicable to parents with non-local children.

5.4.3 In addition, for children attending the ESF special school and ESF mainstream schools at the primary level, a greater proportion of the parents highly preferred or preferred their children to study the International Baccalaureate (IB) curriculum (63.6% and 93.8% respectively). For other international primary schools, the majority of the parents (78.1%) highly preferred or preferred their children to study the UK-based curriculum, whereas a relatively lower proportion of parents highly preferred or preferred the IB curriculum (57.1%) and the national curriculum of their original country (33.7%).

5.4.4 For children attending ESF mainstream schools and other international schools at the secondary level, a greater proportion of the parents highly preferred or preferred their children to study the IB curriculum (89.9% and 77.0% respectively). Relevant findings and analysis by local/non-local students are shown in Tables 5.7 and 5.8 below.

Table 5.7: % of parents' preference (highly preferred or preferred) on curriculum analysed by the types of schools that the children were attending

Curriculum highly preferred or preferred	Parents with children attending primary schools			Parents with children attending secondary schools		
	ESF mainstream schools	ESF special school	Other int'l schools	ESF mainstream schools	ESF special school	Other int'l schools
International Baccalaureate curriculum	93.8%	63.6%	57.1%	89.9%	45.5%	77.0%

Curriculum highly preferred or preferred	Parents with children attending primary schools			Parents with children attending secondary schools		
	ESF main-stream schools	ESF special school	Other int'l schools	ESF main-stream schools	ESF special school	Other int'l schools
UK-based curriculum (e.g. IGCSE)	75.5%	54.5%	78.1%	79.0%	36.4%	75.5%
National Curriculum of country of origin*	30.3%	27.3%	33.7%	20.9%	45.5%	22.9%
Local curriculum	5.2%	0.0%	5.0%	0.9%	9.1%	4.8%

*This option is only applicable to parents with non-local children.

Note: Parents may choose more than one option and hence the percentages above do not add up to 100%.

Table 5.8: % of parents' preference (highly preferred or preferred) on curriculum analysed by the residency status of the children

Curriculum highly preferred or preferred	Parents with children attending primary schools		Parents with children attending secondary schools	
	Local students	Non-local students	Local students	Non-local students
International Baccalaureate curriculum	80.0%	64.5%	83.6%	81.9%
UK-based curriculum (e.g. IGCSE)	80.8%	77.3%	96.2%	73.1%
National Curriculum of country of origin*	N/A	40.7%	N/A	26.4%
Local curriculum	9.1%	4.1%	0.0%	3.9%

*This option is only applicable to parents with non-local children.

Note: Parents may choose more than one option and hence the percentages above do not add up to 100%.

Parents' decision when there was no place from schools offering non-local curriculum

5.4.5 Parents of local and non-local students would make different decisions when there was no place from schools offering non-local curriculum. More than 20% of the parents of local students would send their children to attend local schools while only about 9% of the parents of non-local students would do so. Furthermore, more than 60% of parents of non-local students at primary level and more than 40% of parents of non-local students at secondary level indicated that their whole families would leave Hong Kong should no place at international schools be available, demonstrating the importance of the provision of school places on non-local curriculum for non-local students. Relevant findings are shown in Table 5.9A below. On the other hand, when analysing parents' responses by whether their children are with SEN or not, one could also note the different decisions they would make when there was no place from schools offering non-local curriculum. For instance, while only less than 10% of parents with non-SEN children studying in

secondary schools indicated that their whole families would stay in Hong Kong and send their children to attend local schools, more than 30% of such parents with SEN children would do so when there was no place from schools offering non-local curriculum. Relevant findings are shown in Table 5.9B below, with a further breakdown regarding parents with SEN children in Table 6.3A and Table 6.3B in Chapter 6.

Table 5.9A: % of parents by decision when there was no place from schools offering non-local curriculum analysed by the residency status of their children

Decision of parents if there was no place from schools offering non-local curriculum	Parents with children attending primary schools		Parents with children attending secondary schools	
	Local students	Non-local students	Local students	Non-local students
My whole family will leave Hong Kong	12.5%	60.8%	12.6%	41.8%
My family will stay in Hong Kong while my children will go abroad	25.2%	4.8%	27.8%	21.1%
I will stay, but my spouse and children will leave Hong Kong	1.3%	4.9%	0.0%	3.9%
My whole family will stay, and we will send our children to attend local schools	26.7%	8.8%	21.6%	8.4%
Not decided yet	32.9%	20.3%	29.0%	20.6%
Refused to answer	1.3%	0.2%	8.9%	4.0%
Total	100.0%	100.0%	100.0%	100.0%

Table 5.9B: % of parents by decision when there was no place from schools offering non-local curriculum analysed by whether their children are with SEN or not

Decision of parents if there was no place from schools offering non-local curriculum	Parents with non-SEN children		Parents with SEN children	
	Primary school	Secondary school	Primary school	Secondary school
My whole family will leave Hong Kong	50.5%	37.6%	38.9%	23.7%
My family will stay in Hong Kong while my children will go abroad	9.1%	22.4%	6.0%	15.1%
I will stay, but my spouse and children will leave Hong Kong	4.1%	3.4%	4.9%	0.0%
My whole family will stay, and we will send our children to attend local schools	12.1%	9.8%	21.5%	31.8%
Not decided yet	23.4%	21.8%	26.5%	26.3%
Refused to answer	0.7%	4.9%	2.2%	3.2%
Total	100.0%	100.0%	100.0%	100.0%

5.5 Plan to stay in Hong Kong

5.5.1 At the primary level, about 21.0%, 27.3% and 48.0% of parents with children studying in ESF mainstream schools, the ESF special school and other international schools respectively planned to leave Hong Kong in the coming seven years. For parents with children studying in secondary schools, the corresponding percentages are 7.8%, 0.0% and 38.3% respectively. Relevant findings are shown in Table 5.10 below. These figures, however, should be interpreted with caution as a considerable percentage of parents responded that they had no comments.

Table 5.10: % of parents by whether they planned to leave Hong Kong in the coming seven years

Plans to leave Hong Kong	Parents with children attending primary schools			Parents with children attending secondary schools		
	ESF mainstream schools	ESF special school	Other int'l schools	ESF mainstream schools	ESF special school	Other int'l schools
I have no plan to leave Hong Kong	42.3%	54.5%	27.9%	46.6%	63.6%	43.0%
I have plan to leave Hong Kong in the coming 7 years	21.0%	27.3%	48.0%	7.8%	0.0%	38.3%
Others ¹⁰	6.3%	0.0%	6.1%	2.1%	0.0%	2.0%
No comment	30.5%	18.2%	18.0%	43.5%	36.4%	16.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

5.5.2 For parents with local children studying in international schools, 8.5% and 3.7% of these parents indicated that they planned to leave Hong Kong in the coming seven years at the primary and secondary level respectively. For parents with non-local children studying in international schools, the corresponding figures are 48.8% and 30.2% at the primary and secondary level respectively.

5.5.3 The percentages of parents with non-local students that planned to leave Hong Kong in the coming seven years were higher than those of parents with local students for both primary and secondary levels. It was probably due to the tenure of office in Hong Kong (commonly lasts for a few years' time) for expatriate staff. Relevant findings are shown in Table 5.11 below.

¹⁰ "Others" refers to those who have indicated a plan to leave Hong Kong, but have no concrete timeframe in mind.

Table 5.11: % of parents by comment on length of stay in Hong Kong analysed by the residency status of their children

Comments on length of stay	Parents with children attending international primary schools		Parents with children attending international secondary schools	
	Local Students	Non-local Students	Local Students	Non-local Students
I have no plan to leave Hong Kong	59.3%	25.3%	52.7%	42.9%
I have plan to leave Hong Kong, with breakdown by length of stay:				
For around 1-2 years	0.7%	9.4%	0.0%	2.1%
For around 3-5 years	7.8%	21.7%	0.0%	16.6%
For around 6-7 years	0.1%	17.6%	3.7%	11.5%
Others ¹¹	9.1%	5.3%	3.7%	1.7%
No comment	23.1%	20.6%	39.9%	25.2%
Total	100.0%	100.0%	100.0%	100.0%

¹¹ “Others” refers to those who have indicated a plan to leave Hong Kong, but have no concrete timeframe in mind.

Chapter 6 Findings on the Provision of Special Education Services

6.1 Schools' views on provision of special education services

Provision of school places for students with special educational needs (SEN)

6.1.1 Among the international schools in Hong Kong, currently there is one special school operated by ESF to cater for students with severe SEN, whereas some other international schools including all enumerated ESF mainstream schools would provide support to students with mild to moderate SEN in an integrated and/or special class setting. The school survey results show that 85.7% of the enumerated schools (including all enumerated ESF schools and other international schools) had provided special education services to children with SEN and the major types of SEN catered by these schools were Attention Deficit / Hyperactivity Disorder (100% of schools offering special education services), Specific Learning Difficulties in Reading and Writing (96.7%), Autistic Spectrum Disorders (86.7%), Hearing Impairment (83.3%) and Speech and Language Impairment (83.3%).

6.1.2 For those enumerated schools not providing special education services, 60.0% indicated that there were too many types of SEN and they could not provide additional support to cater for all types of SEN, whereas 40.0% expressed that higher cost would be involved in providing special education services and that they could not recruit teachers or professionals with training in special education to support students with SEN.

Admission policy for SEN students

6.1.3 About 80.0% of the enumerated schools indicated that they had admission policy for SEN students and the policies included “confining to students with mild SEN” (46.4% of the schools concerned), “keeping a desired ratio of SEN students” (32.1%) and “admitting only particular types of SEN students will be admitted” (21.4%).

Collection of additional fees from students receiving special education service

6.1.4 ESF charges the same tuition fee levels for students studying in their mainstream schools and the special school while individual parents may have to pay for specific services such as individual support by education assistants, and therapy services which are outside the scope of the main curriculum. 19.4% of the enumerated schools that had admitted students with SEN collected additional fees from students receiving special education services provided by the schools. The additional fees collected were used to recruit staff with training in special education (66.7% of the schools charging additional fees), to hire special education related services (such as speech therapy, occupational therapy, physiotherapy, etc.) (50.0%), and to purchase facilities required for students with SEN (50.0%).

Difficulties encountered in providing special education services

6.1.5 The majority (93.5%) of the enumerated schools had encountered difficulties in providing special education services. For those schools that had encountered difficulties, about 75.9% indicated that some students with SEN required intensive support services for which the school might not be able to fully meet the cost and about 62.1% indicated that they had difficulties in financing the cost involved in providing special education services. Furthermore, 48.3% indicated that the progress of learning and teaching for other non-SEN students would be affected by diverting staff resources to provide special education services.

Factors encouraging schools to accept students with SEN

6.1.6 82.9% of the enumerated schools considered “funding specifically for special education services” the most important factor, followed by “if parents are willing to pay additional service charge for the special education services required by their children” (60.0%) and “(more) staff with training in special education could be employed” (45.7%) for encouraging them to accept students with SEN.

6.2 Parents' views on provision of special education services

Types of schools attended and parents' preference

6.2.1 Among the 78 parents with SEN children (including 14 local and 64 non-local students) completing the parent questionnaire with additional questions on SEN, 21 had children attending the ESF special school, whereas 37 and 20 had children attending ESF mainstream schools and other international schools respectively.

6.2.2 Only 24.7% and 4.9% of the parents with SEN children studying in mainstream international primary and secondary schools respectively preferred or highly preferred the ESF special school at the time of application whereas the corresponding percentage for parents with SEN children studying in the ESF special school is 90.9%. This indicates that most of the current students with SEN can be accommodated by mainstream international schools. More than half (60.2%) of parents with SEN children studying in the ESF special school also preferred or highly preferred aided special schools¹² at the time of application. The percentage is much higher than the corresponding proportion for parents with SEN children studying in mainstream international primary and secondary schools (7.0% and 0.0%). Please see Table 6.1 below for details.

Table 6.1: Preference of school of parents of SEN students studying in different types of international schools at the time of application

Preferred or highly preferred	Parents with SEN children studying in			All
	ESF Special School	Mainstream international schools (ESF and other international schools)		
		Primary	Secondary	
ESF Special School	90.9%	24.7%	4.9%	18.6%
Mainstream international schools (ESF and other international schools)	79.5%	95.5%	82.3%	87.9%
Aided Special School	60.2%	7.0%	0.0%	6.6%
PIS (non-local curriculum)	19.3%	69.1%	56.6%	59.8%

¹² Parents are allowed to indicate preference for more than one option for the question concerned and hence some parents may indicate that they prefer or highly prefer aided special schools as well as the ESF special school at the time of application. It should also be noted that, besides parents' preference, admission to special school or a special class in a mainstream school would also be subject to results of test on the SEN, and the relevant schools' considerations on the suitability for admitting the SEN students concerned.

Preferred or highly preferred	Parents with SEN children studying in			All
	ESF Special School	Mainstream international schools (ESF and other international schools)		
		Primary	Secondary	
DSS (non-local curriculum)	19.3%	42.3%	29.8%	34.6%
DSS (local curriculum)	0.0%	2.3%	2.9%	2.5%
Private schools (non-local curriculum)	25.0%	29.7%	19.7%	24.4%
Local government or aided schools	5.7%	3.5%	2.1%	2.9%

Reasons for sending SEN children to study in international schools

6.2.3 For those parents with SEN children studying in mainstream international schools who considered both international and local schools viable options, about 59.2% of them with children studying at the primary level and 18.6% of them with children studying at the secondary level pointed out that being non-HKPR was the reason for not sending their children to local schools (including local special schools)¹³. And, as shown in Table 5.6 in Chapter 5 of this report, for parents with SEN children studying in the ESF special school, and mainstream international primary and secondary schools, the main reasons for sending their children to study in the schools concerned included “more flexible/interactive learning in international school” (49.9%, 75.5% and 77.3% respectively), “more relaxed learning environment and less study pressure in international school” (34.1%, 68.7% and 49.6%) and “language barrier, cannot cope with local curriculum” (62.4%, 65.0% and 55.3%). As mentioned in para. 5.4.2 above, these reasons are also commonly shared by parents with non-SEN children studying in international schools.

Difficulties encountered in finding places in international schools

6.2.4 As shown in Table 6.2 below, among parents with SEN children studying in the ESF special school, the major difficulties encountered in finding international school places for their children included “some schools do not provide services for students with SEN” (76.1% of parents concerned) and “some schools do not have sufficient facilities

¹³ In the parent survey, 6 and 7 parents with SEN children studying in mainstream international schools at primary and secondary levels respectively considered both international schools and local schools viable options. Caution should be taken in interpreting the figures due to the small sample size.

for students with SEN” (61.3%), followed by “waiting time for international schools I prefer is too long” (39.8%). On the other hand, “waiting time for international schools I prefer is too long” was the second most and most common difficulty encountered by parents with SEN children attending mainstream international primary (42.7%) and secondary (43.3%) schools.

Table 6.2: % of parents encountering difficulties encountered in finding places in international schools for SEN children (Multiple Responses)

	ESF special school	Mainstream int'l schools		All
		Primary	Secondary	
Some schools do not provide services for students with SEN	76.1%	46.9%	15.7%	32.8%
Some schools do not have sufficient facilities for students with SEN	61.3%	29.3%	22.8%	27.9%
Waiting time for international schools I prefer is too long	39.8%	42.7%	43.3%	42.8%
International schools I prefer are located too far from our place of residence	21.6%	30.7%	17.8%	23.6%
It is difficult for the children to get admitted to international schools early in advance before my family members come to Hong Kong	9.1%	19.8%	27.1%	22.9%
Much time is required in applying for several international schools in order to increase the chance of being admitted into international schools	3.4%	38.7%	16.4%	25.3%
Little information is available on the quality of teaching in different international schools	0.0%	18.8%	10.0%	13.2%

Note: Parents may choose more than one option for the question concerned and hence the percentages above do not add up to 100%.

Whether the parents and/or their families would leave Hong Kong if no place from schools offering non-local curriculum was available in Hong Kong

6.2.5 More than half of the parents with SEN children attending the ESF special school would leave Hong Kong if there was no place available in schools offering non-local curriculum. The corresponding percentage was lower for those with SEN children attending mainstream international primary and secondary schools. Separately, for parents with SEN children studying at secondary level in mainstream schools, more would choose to send their children to attend local school than to leave Hong Kong if no place from schools offering non-local curriculum was available. Relevant findings are shown in Table 6.3A below, with a separate analysis by the residency status of the

children shown in Table 6.3B. It should be noted that a significant proportion of the parents have not decided on / refuse to answer this question, and hence the findings should be interpreted with caution.

Table 6.3A: % of parents with SEN children by whether they (and their families) would leave Hong Kong if no place from schools offering non-local curriculum was available in Hong Kong

Whether to leave Hong Kong if no place from schools offering non-local curriculum was available	% of parents with SEN children			
	ESF Special School	Mainstream (ESF and other international schools)		All
		Primary	Secondary	
My whole family will leave Hong Kong	52.2%	37.7%	22.1%	30.7%
My whole family will stay, while we will send our children to attend local schools	18.2%	21.7%	32.7%	27.1%
My family will stay in Hong Kong and my children will go abroad	0.0%	6.3%	16.2%	10.9%
I will stay, but my spouse and children will leave Hong Kong	0.0%	5.1%	0.0%	2.2%
Not decided yet	18.2%	26.9%	26.9%	26.4%
Refused to answer	11.4%	2.3%	2.1%	2.7%
Total	100.0%	100.0%	100.0%	100.0%

Table 6.3B: % of parents with SEN children by whether they (and their families) would leave Hong Kong if no place from schools offering non-local curriculum was available in Hong Kong analysed by the residency status of the children

Whether to leave Hong Kong if no place from schools offering non-local curriculum was available	% of parents with SEN children			
	Parents with children attending primary schools		Parents with children attending secondary schools	
	Local students	Non-local students	Local students	Non-local students
my whole family will leave Hong Kong	38.9%	38.9%	0.0%	34.4%
my whole family will stay, and we will send our children to attend local schools	36.4%	18.3%	31.9%	31.7%
my family will stay in Hong Kong and my children will go abroad	0.0%	7.3%	36.1%	5.6%
I will stay, but my spouse and children will leave Hong Kong	0.0%	5.9%	0.0%	0.0%
Not decided yet	24.7%	26.9%	31.9%	23.8%
Refuse to answer	0.0%	2.7%	0.0%	4.6%
Total	100.0%	100.0%	100.0%	100.0%

Consideration on selection of different types of schools

6.2.6 For parents with SEN children studying in the ESF special school who have indicated that both international and local schools are viable options¹⁴, the main reasons for their not sending their children to local schools, were “SEN services provided by international schools are better” (69.8% of parents concerned), “studying at international schools will offer better prospect for my child” (50.0% of parents concerned) and “difficulties envisaged after admission to a local school” (50.0% of parents concerned). For parents with SEN children studying in mainstream international primary or secondary schools who have indicated that both international and local schools are viable options¹⁵, one of the main reasons for not sending their children to local schools was “studying at international schools will offer better prospect for my child” (40.8% and 81.4% of parents concerned respectively). Besides, about 59.2% and 18.6% of them respectively pointed out that being non-HKPR was the reason for not sending their children to local schools.

¹⁴ In the parent survey, 4 parents with SEN children studying in ESF special school considered both international schools and local schools viable options. Caution should be taken in interpreting the figures due to the small sample size.

¹⁵ In the parent survey, 6 and 7 parents with SEN children studying in mainstream international schools at primary and secondary levels respectively considered both international schools and local schools viable options. Caution should be taken in interpreting the figures due to the small sample size.

Chapter 7 Findings from the Business Survey

7.1 Introduction

7.1.1 The business survey was conducted on business establishments. A total of 3 077 business establishments were enumerated, with 78.3% of them being small and medium enterprises (SMEs)¹⁶ and 21.7% being large establishments. The findings have been grossed up statistically to represent views from business establishments of different industries and different employment size.

7.2 Factors affecting demand for international school places

Employees with employment visa and naturalised employees

7.2.1 About 6.3% of business establishments were currently employing staff with employment visas in Hong Kong. The percentage for large establishments (28.8% of the large establishments) was higher than that for SMEs (5.9% of the SMEs). Each of these business establishments employed 4 staff with employment visas on average, with large establishments employing 10 such staff and SMEs employing 3 such staff.

7.2.2 In addition, about 2.7% of business establishments had employees who were naturalised residents of Hong Kong previously holding employment visas. The percentage for large establishments (10.2%) was higher than that for SMEs (2.6%). Each of these business establishments employed on average 4 naturalised staff.

7.2.3 Based on findings from this business survey, it is estimated that business establishments were currently employing 70 727 employees with employment visas in Hong Kong and 33 487 employees who were naturalised persons of Hong Kong previously holding employment visas.

Rotation plan for expatriate staff

7.2.4 About 17.8% of the business establishments that recruited expatriate staff had rotation plan while 31.4% did not. A further 35.4% indicated that this was not an applicable

¹⁶ For the purposes of the present study, business establishments with an employment size smaller than 50 are regarded as small and medium enterprises (SMEs).

arrangement for their companies, probably because they do not have such staff or they do not have offices outside Hong Kong to implement a rotation plan.

Expatriate staff with children studying in schools offering non-local curriculum

7.2.5 About 22.9% of the business establishments with expatriates indicated that they were employing expatriate workers whose child(ren) were studying in schools offering non-local curriculum in Hong Kong. The percentages for large establishments and SMEs were 24.6% and 22.7% respectively.

Future potential demand

7.2.6 About 3.1% of business establishments planned to recruit or relocate staff with employment visas or staff who were naturalised persons from outside Hong Kong in the coming seven years. The percentages for large establishments and SMEs were 4.2% and 3.1% respectively.

Company's measures to help find international school places

7.2.7 About 9.3% of business establishments with staff recruited or relocated from outside Hong Kong had measures to help children of these staff find places in Hong Kong schools offering non-local curriculum. The percentage was higher for large establishments (at 13.6%) and lower for SMEs (9.0%).

7.2.8 Among business establishments with measures to help staff with children attending schools offering non-local curriculum, more than half (55.7%) offered financial resources to such staff. The financial resources were mostly offered to cover tuition fees (75.6% of business establishments offering financial resources to such staff). It should be noted, however, that 23.1% of business establishments with support measures for such staff refused to disclose details on the measures adopted.

7.3 Impact on business

7.3.1 The availability of international school places would help company recruit or relocate staff from outside Hong Kong whose children need to attend international schools. About 0.3% of business establishments indicated that they had staff who had resigned and left Hong Kong in 2014/15 because they could not find international school places

for their children. The percentage was slightly higher for large establishments (0.8%) and lower for SMEs (at 0.3%). In addition, about 0.04% of business establishments failed to recruit potential candidates in the past 12 months with the reason for these candidates to turn down their offer being their failing to find international school places in Hong Kong. The percentage was slightly higher for large establishments (at 0.28%) and lower for SMEs (0.03%). Caution should be taken when interpreting these findings since the survey did not ask about the problems encountered by those persons in finding international school places.

7.3.2 As shown in Table 7.1 below, more than half of the business establishments indicated that staff cost (56.6%), cost of office accommodation (56.1%) and availability of suitable staff in Hong Kong (55.8%) are very important or important factors that affect their decisions concerning business expansion. About 10.5% considered availability of places in schools offering non-local curriculum as a very important or important factor, while 44.0% considered this not very important or not important at all. Furthermore, 54 (1.6%) business establishments had given suggestions on the admission arrangement of international schools that will help staff recruited or relocated from outside Hong Kong to find international school places for their children when asked. Among them, 38% suggested that international schools should reduce fees or that the fees of international schools are too expensive.

Table 7.1: The level of importance of factors affecting the company's decision concerning business expansion

Factors	Very important or important	Not very important or not important at all
Staff cost	56.6%	18.3%
Cost on education allowance for children	13.1%	43.0%
Cost of housing allowance for staff	28.2%	32.8%
Cost of office accommodation	56.1%	17.5%
Environmental quality (e.g. air pollution)	34.5%	33.8%
Availability of places in schools offering non-local curriculum	10.5%	44.0%
Cost of business support services	42.4%	21.8%
Cost for compliance with laws and regulations	45.3%	20.9%
Availability of suitable staff	55.8%	15.2%

7.3.3 Less than 20% of business establishments indicated that if their staff had difficulties finding school places offering non-local curriculum for their children, it would have an impact on their business. Such impact included having difficulties recruiting or relocating qualified staff from outside Hong Kong (11.5% of business establishments), having difficulties retaining the staff concerned (9.6%), reducing the number of staff in Hong Kong who are recruited or relocated from outside Hong Kong (8.5%), slowing down the pace of expansion in Hong Kong (7.4%), recruiting or relocating staff from outside Hong Kong having no children (6.3%) and relocating to places outside Hong Kong where there was adequate provision of school places offering non-local curriculum (4.0%).

Chapter 8 Projection of Demand for International School Places¹⁷

8.1 Overall Demand since the 2012 Study

Primary Level

- 8.1.1 The total number of students in international schools (i.e. ESF mainstream and other international schools) had increased from 18 089 in 2011/12 to 20 439 in 2015/16 (+13% or +2 350). In the same period, while the number of places provided by ESF schools remained unchanged, the number of places in other international schools had increased by 2 367. Hence, the increase was mainly attributed to the increase in places in other international schools. On the other hand, the number of applicants on waiting lists¹⁸ for international school places had decreased from 3 615 to 2 105 applicants over the same period of time. This indicated that the increase in demand for international school places had become less acute and it is expected that the new supply of school places in the pipeline will be able to meet the demand from those currently on the waiting lists.
- 8.1.2 On the student mix (see Table 8.1 below), there was an apparent increase in the share of local students in ESF schools whose number of local students in 2015/16 had doubled that in 2011/12. On the other hand, the share and number of their non-local counterparts, i.e. those holding passports other than HKSAR Passport or British National (Overseas) Passport regardless of whether they are HK permanent residents (HKPR), recorded decreases. This was attributed to the drop in number of non-local P1 students and increased net outflow of non-local students at other grades as observed in recent years. A plausible reason was that the increase in supply of places in other international schools provided more options for non-local students, in particular those coming from overseas but yet obtained HKPR status (i.e. non-local non-HKPR students).
- 8.1.3 Owing to the expansion of other international schools in recent years, there was increase in the numbers of all types of students (namely, local students, non-local HKPR students and non-local non-HKPR students) studying in these schools. The more significant

¹⁷ Projection of demand for international school places in this chapter does not include that for the ESF Special School.

¹⁸ Estimated from the figures reported by international schools with adjustment for the estimated number of applications that might be submitted by the same student and the estimated number of applicants who were subsequently admitted.

increases in absolute term were observed in local students (+1 083) and non-local non-HKPR students (+1 016). For ESF and other international schools as a whole, it is noted that the largest source of increase in the number of international school students was local students, followed by non-local non-HKPR students. In contrast, the number of non-local HKPR students remained fairly stable. As reported by schools, the majority of applicants on their respective waiting lists are currently residing in Hong Kong. The relatively larger increase in local students was likely due to the admission of more local students on the waiting list rather than the increasing propensity of local students to study in international schools as the waiting lists dwindled simultaneously. After discounting this factor, non-local non-HKPR students remain the key source of growth of demand for international school places in recent years.

Table 8.1: Number of primary students in ESF and other international schools from 2011/12 to 2015/16

	Number of local students	Number of non-local students		
		HKPR	Non-HKPR [#]	Overall
ESF				
2011/12	670	2 930	2 506	5 436
2012/13	844	2 643	2 591	5 234
2013/14	982	2 522	2 584	5 106
2014/15	1 127	2 614	2 342	4 956
2015/16	1 353	2 564	2 149	4 713
Other international schools				
2011/12	1 722	3 435	6 826	10 261
2012/13	2 080	3 588	7 098	10 686
2013/14	2 226	3 757	7 421	11 178
2014/15	2 568	3 537	8 005	11 542
2015/16	2 805	3 726	7 842	11 568
Overall				
2011/12	2 392	6 365	9 332	15 697
2012/13	2 924	6 231	9 689	15 920
2013/14	3 208	6 280	10 004	16 284
2014/15	3 695	6 151	10 347	16 498
2015/16	4 158	6 290	9 991	16 281

Note:

[#] Estimated figures based on figures of those schools which have responded to question on residency status of students. For the non-responding schools, it is assumed that the share of non-HKPR follows the average pattern of responded schools. Caution should be taken in interpreting the figures.

Secondary Level

- 8.1.4 The total number of students in international schools (i.e. ESF schools and other international schools) had increased from 14 908 in 2011/12 to 16 530 in 2015/16 (+11% or +1 622). The increase was mainly contributed by other international schools. While the places in ESF remained fairly stable, the places in other international schools had increased by 1 844. The number of applicants on waiting list¹⁹ for international school places had also decreased from 944 to 333 applicants over the same period. The unmet demand as represented by applicants on the waiting lists hovered around only a few percent of the total enrolment for most of the years.
- 8.1.5 There were remarkable increases in the number and share of local students in ESF and other international schools (see Table 8.2 below). As a whole, the number of local students studying in international schools had increased from 1 789 in 2011/12 to 2 931 in 2015/16 (+1 142), accounting for some 70% of the increase in total enrolment over the same period.
- 8.1.6 As regards non-local students, there was a persistent decrease in number of non-local students at ESF schools over the same period, which was mainly contributed by a decrease in the number of non-local HKPR students. On the other hand, the number of non-local non-HKPR students remained fairly stable. More detailed analysis found that the decrease in the number of non-local students at ESF schools was due to a decrease in enrolment of non-local HKPR students at S1 level and increased net outflows at other grades. The decrease in the enrolment of non-local HKPR students at S1 level was in general resulted from the decreasing number of non-local HKPR students at the primary level of ESF schools in previous years.
- 8.1.7 For other international schools, the number of non-local students had persistently increased but the rate had become moderate in recent years. There was no apparent increasing trend in non-local HKPR students and non-local non-HKPR students at these schools. The numbers were affected by net outflows (mainly due to leaving Hong Kong / studying overseas) which fluctuate greatly throughout S2 to S7. More detailed analysis

¹⁹ Estimated from the figures reported by international schools with adjustment for the estimated number of applications that might be submitted by the same student and the estimated number of applicants who were subsequently admitted.

found that in contrast to ESF schools, the number of non-local students at S1 level at other international schools had persistently increased in recent years, which probably indicated that the other international schools might have drawn away non-local students from ESF with the increase in the supply of school places.

Table 8.2: Number of secondary students in ESF and other international schools from 2011/12 to 2015/16

	Number of local students	Number of non-local students		
		HKPR	Non-HKPR [#]	Overall
ESF				
2011/12	643	4 600	1 486	6 086
2012/13	767	4 286	1 715	6 001
2013/14	1 015	4 066	1 725	5 791
2014/15	1 190	3 897	1 749	5 646
2015/16	1 318	3 676	1 764	5 440
Other international schools				
2011/12	1 146	2 602	4 431	7 033
2012/13	1 307	2 668	4 787	7 455
2013/14	1 427	4 019	3 836	7 855
2014/15	1 528	3 739	4 339	8 078
2015/16	1 613	3 679	4 480	8 159
Overall				
2011/12	1 789	7 202	5 917	13 119
2012/13	2 074	6 953	6 503	13 456
2013/14	2 442	8 084	5 562	13 646
2014/15	2 718	7 637	6 087	13 724
2015/16	2 931	7 355	6 244	13 599

Note:

[#] Estimated figures based on figures of those schools which have responded to question on residency status of students. For the non-responding schools, it is assumed that the share of non-HKPR follows the average pattern of responded schools. Caution should be taken in interpreting the figures.

8.2 Projected demand from local students

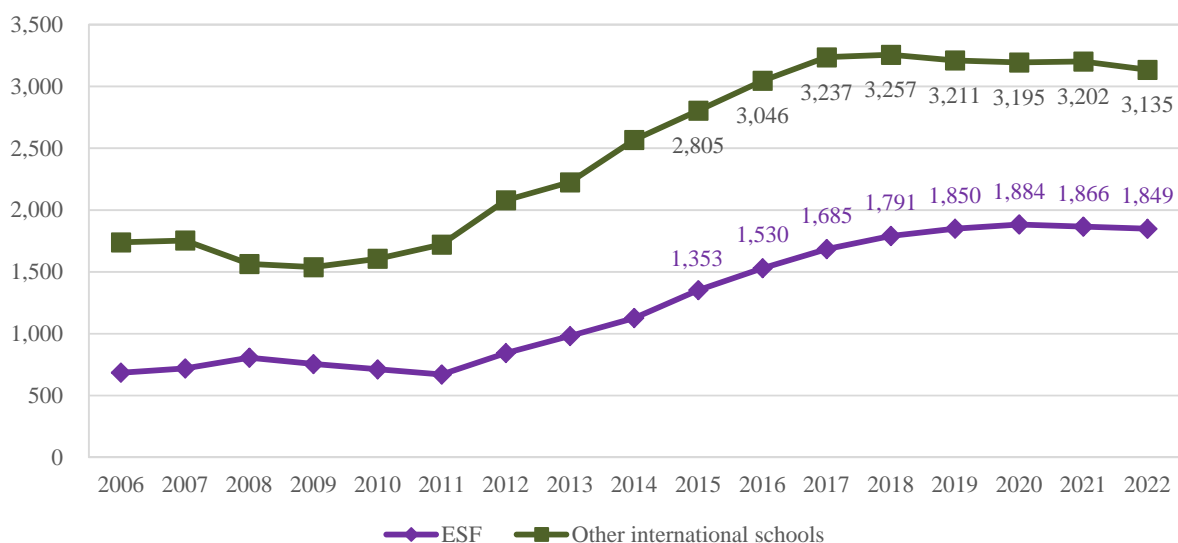
8.2.1 In the 2012 Study, only the enrolment ratio method was used in projecting demand from local students. In the present study, both the enrolment ratio and the grade transition model have been examined. With the availability of longer historical time series data on enrolment by grades, it is possible to adopt both the enrolment and grade transition models in projecting future enrolment by school type. This approach will take into account changes in progression of students between grades and between the primary and secondary levels. The use of the grade transition model will facilitate more precise projections on future enrolment by grades, levels of education and types of international schools.

- 8.2.2 Starting with P1, the enrolment ratio of a given school type (i.e. ESF schools or other international schools), expressed as a percentage of the relevant school-age population (i.e. age 5) enrolled in P1, was compiled. Future enrolment in P1 was projected based on the projected population at age 5 and the projected enrolment ratio. The projected enrolment in subsequent grades at the primary and secondary levels was compiled using the projected P1 enrolment and the projected transition changes between grades, following the grade transition model. A cursory examination of the transition changes between grades over the past years shows that the changes fluctuate from year to year. For the purposes of planning the provision of school places in meeting the projected demand, the average between-grade-transition changes over the past four years were used in projecting future enrolment in P2 and beyond, with a view to smoothing the significant fluctuations across years.
- 8.2.3 It is assumed that the projected enrolment ratio of local students at P1 by ESF or other international schools will remain unchanged at the same level as the average of the ratios observed in the latest three years. Firstly, it is because there has been significant increase in the number of local students at P1 since the 2012 Study. Secondly, there has also been a drop in the number of applicants on the waiting lists for P1 pertaining to both ESF schools and other international schools in recent years. Thirdly, the number of applicants on waiting lists for a few famous schools have accounted for a large proportion of the overall number of applicants on waiting lists for all international schools. It is therefore not unreasonable to assume the propensity of local students to study in international schools would remain stable in the coming years.

Enrolment of local students in international primary schools

- 8.2.4 The number of local students attending ESF primary schools was projected to increase from 1 353 in 2015/16 to 1 849 in 2022/23 (+37%). This is in line with the increased admission of local students at P1 and net inflows of local students at other grades in ESF schools in recent years. For other international schools, the number of local students was projected to increase from 2 805 in 2015/16 to 3 135 in 2022/23 in (+12%).

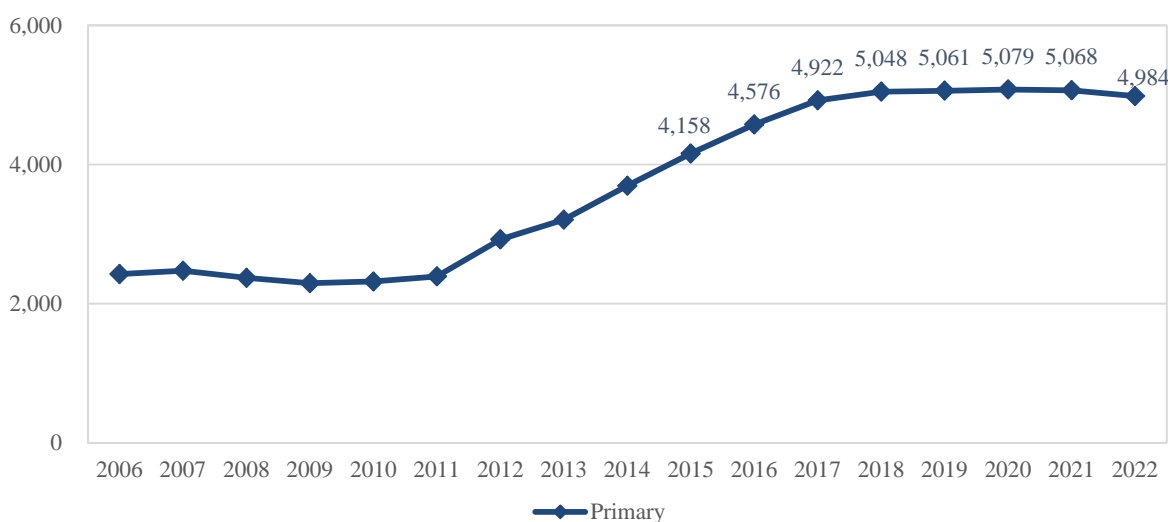
Chart 8.1: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of local students studying in **international primary schools** by school type (i.e. ESF or other international schools)



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

8.2.5 Taking ESF and other international schools together, the overall demand for international primary school places from local students was projected to increase from 4 158 in 2015/16 to 4 984 in 2022/23 (+20%).

Chart 8.2: Observed (2006/07-2015/16) and projected (2016/17-2022/23) total number of local students studying in international primary schools

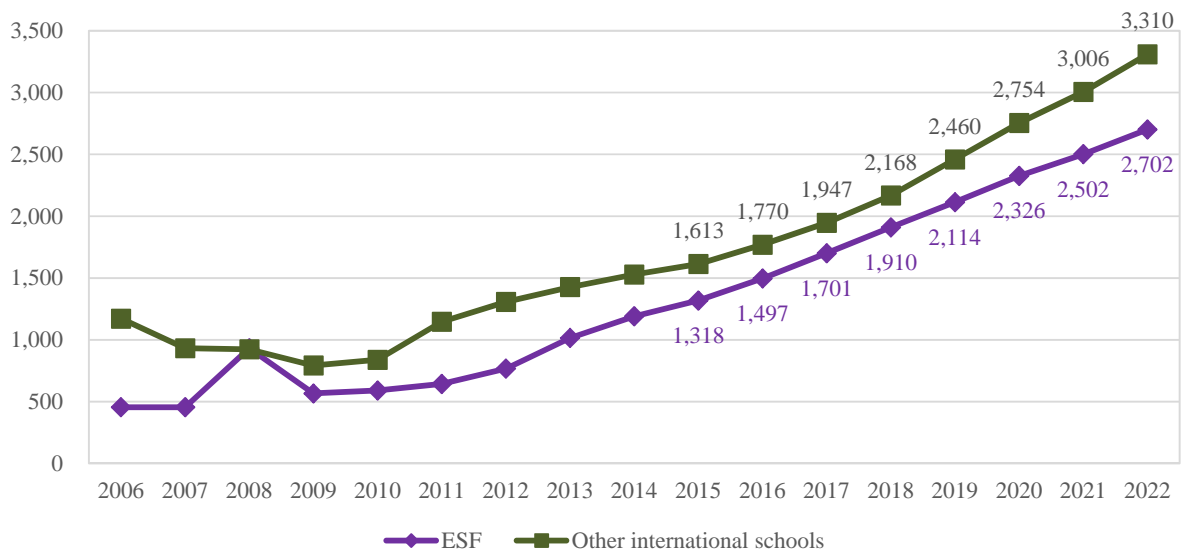


Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Enrolment of local students in international secondary schools

8.2.6 It is projected that the demand for ESF secondary schools from local students will be doubled by 2022/23 as compared to that in 2015/16. This is in line with the increase in number of local students at P1 and the net inflows of local students (who mainly filled up places left by net outflows of non-local students) throughout other grades up to S7 as observed from the past data. As regards other international schools, the demand from local students is also projected to increase remarkably by 2022/23, as underpinned by the increase in local student enrolment at primary level in recent years.

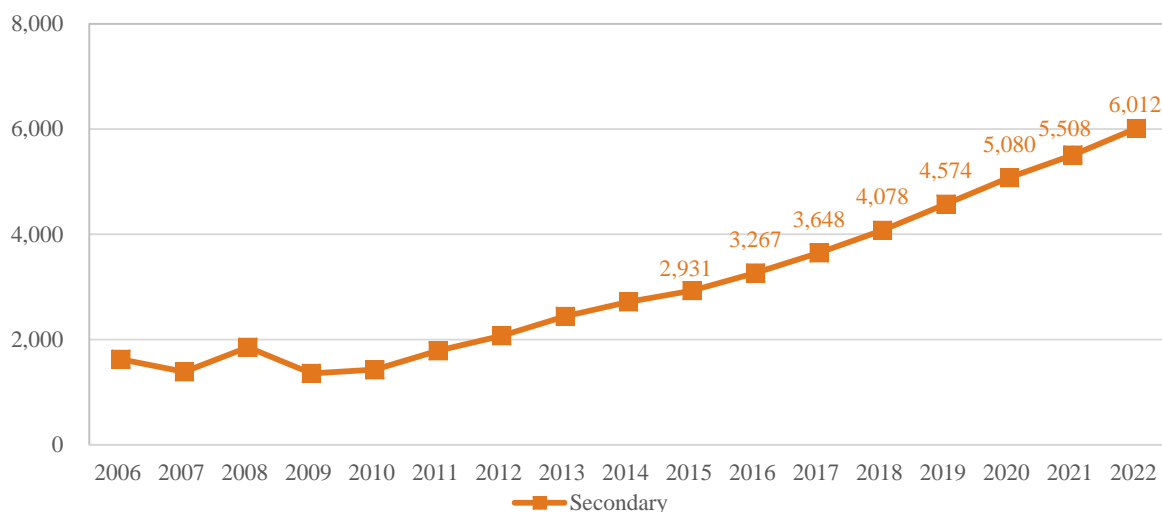
*Chart 8.3: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of local students studying in **international secondary schools** by school type (i.e. ESF or other international schools)*



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

8.2.7 The overall demand for international secondary school places from local students is projected to increase from 2 931 in 2015/16 to 6 012 in 2022/23 (+105%).

Chart 8.4: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of local students studying in international secondary schools



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

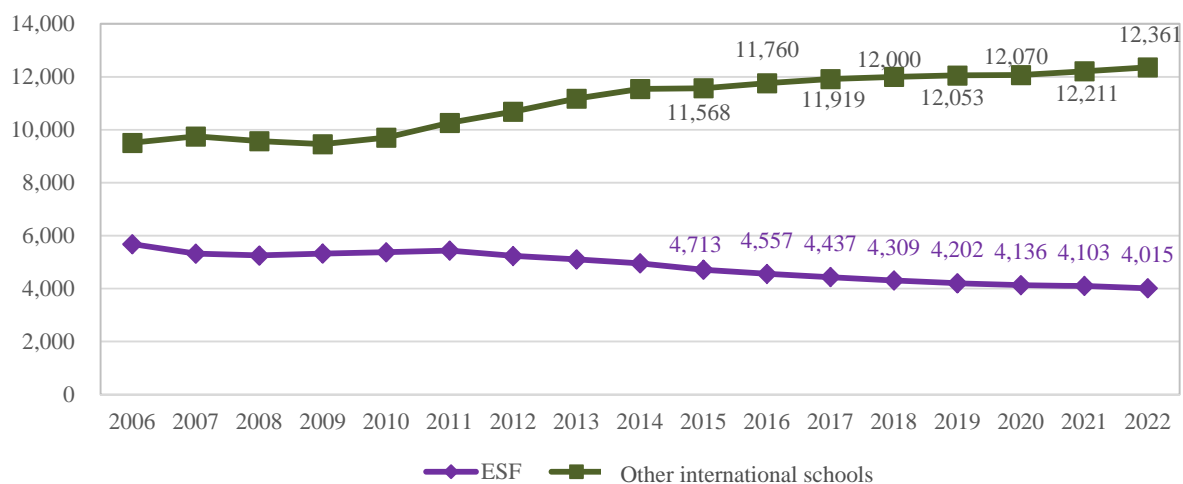
8.3 Projected demand from non-local students

8.3.1 It is believed that demand from non-local students is related to business activities in Hong Kong. As a proxy measure of the level of business activities, the Gross Domestic Product (GDP), in chained 2013 prices, was chosen in compiling the projection. Indeed, the number of non-local P1 students at the primary level in international schools over the past 10 years is found to be positively correlated with GDP, with a correlation coefficient of 0.76, indicating a rather strong statistically significant correlation at 95% confidence. The forecasted real growth of GDP from 2016 is 3%, being less than 4% adopted in the 2012 Study. Hence, it is projected that the growth in the number of non-local students will be more moderate when compared with that in the 2012 Study.

Enrolment of non-local students in international primary schools

8.3.2 Continuing the trend in recent years, the number of non-local students attending ESF primary schools was projected to decrease from 4 713 in 2015/16 to 4 015 in 2022/23 (–15%). On the other hand, the number of non-local students attending other international primary schools was projected to increase from 11 568 to 12 361 (+7%).

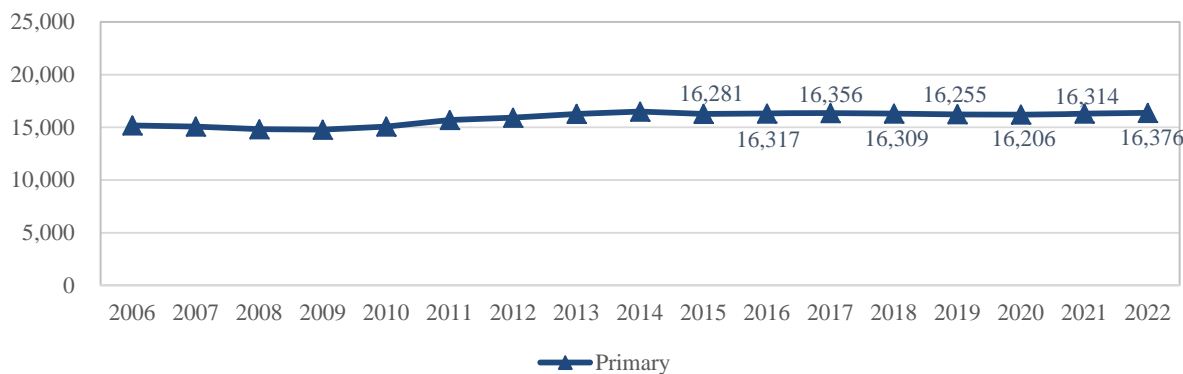
Chart 8.5: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of non-local students studying in **international primary schools** by school type (i.e. ESF or other international schools)



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

8.3.3 The total number of non-local students studying in international primary schools was projected to increase slightly from 16 281 in 2015/16 to 16 376 in 2022/23 (+1%).

Chart 8.6: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of non-local students studying in **international primary schools**



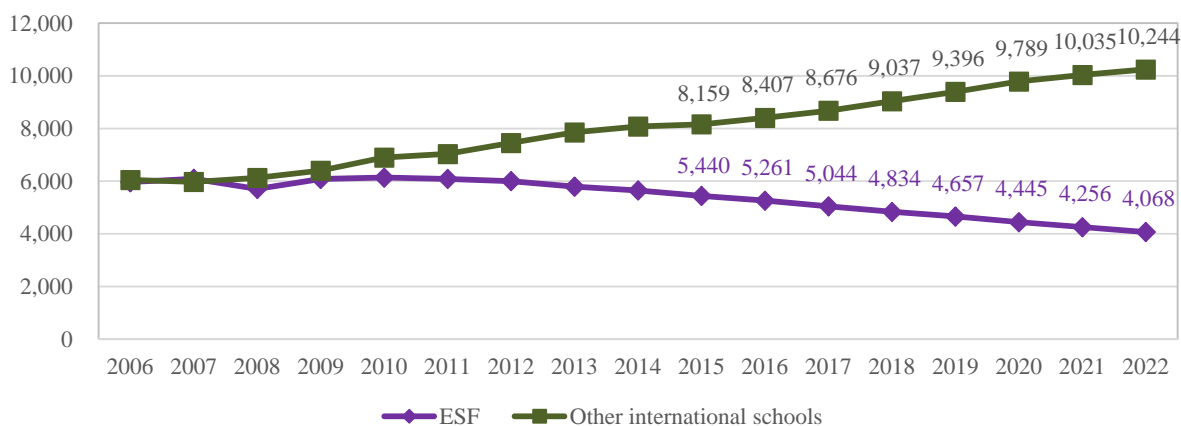
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Enrolment of non-local students in international secondary schools

8.3.4 The number of non-local students studying in ESF secondary schools was projected to decrease from 5 440 in 2015/16 to 4 068 in 2022/23 (-25%). On the other hand, the number of non-local students studying in other international secondary schools was projected to increase from 8 159 to 10 244 (+26%), which was also underpinned by

increase in non-local student enrolment in other international schools at primary level in recent years.

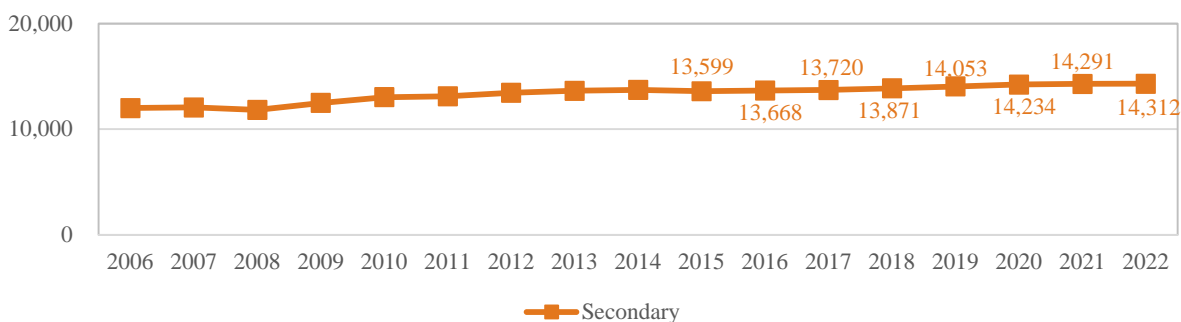
Chart 8.7: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of non-local students studying in *international secondary schools* by school type (i.e. ESF or other international schools)



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

8.3.5 The total number of non-local students studying in international secondary schools was projected to increase from 13 599 in 2015/16 to 14 312 in 2022/23 (+5%).

Chart 8.8: Observed (2006/07-2015/16) and projected (2016/17-2022/23) number of non-local students studying in *international secondary schools*



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

8.4 Estimating unmet demand

8.4.1 The projection presented above is based on the number of students enrolled in international schools. There is an additional component of demand from applicants placed on the waiting lists of international schools (i.e. the so-called “unmet” demand). As some students on the waiting lists of international schools may have already been enrolled in another international school, it is necessary to adjust the number of applicants placed on the waiting lists reported by schools. The adjusted factors used are shown in Table 8.3 below.

Table 8.3: Adjustment factors applied to waiting list statistics at both the primary and secondary levels: % of students that remain on the waiting list after admission to another school

Types of schools	% of students who remain on the waiting list after admission to another school	
	Primary	Secondary
ESF schools	73.9%	62.8%
Other international schools	65.0%	59.7%

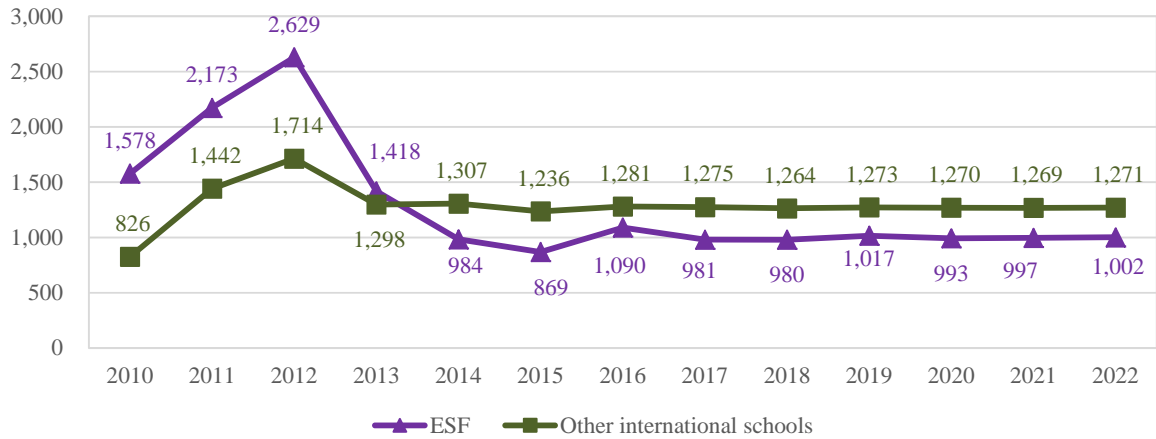
Note: The adjustment factors above are calculated based on schools’ response on the percentage of students admitted to the school during the school year.

8.4.2 Furthermore, some students may have applied for more than one international school. According to findings of the parent survey on the number of applications made to other schools which were placed on the waiting lists, at the primary level, the average number of applications made by applicants placed on the waiting list is 1.55 for ESF schools and 2.10 for other international schools. Thus, it is also necessary to adjust the findings in Table 8.3 above taking into account multiple applications for schools.

8.4.3 The number of applications at the primary and secondary levels on the waiting lists of international schools over the past six years (i.e. 2010/11 – 2015/16), after having adjusted for students already admitted to other schools and multiple applications as discussed above, is shown in Charts 8.9 and 8.10 below. Comparing with the findings of the 2012 Study which revealed a steady and slight increase of projected unmet number of applications placed on the waiting lists (for both international primary and secondary schools) from 2000 to 2011, there is no clear trend observed from the past data in the current Study. It is proposed to take the average over the past three years as the projected

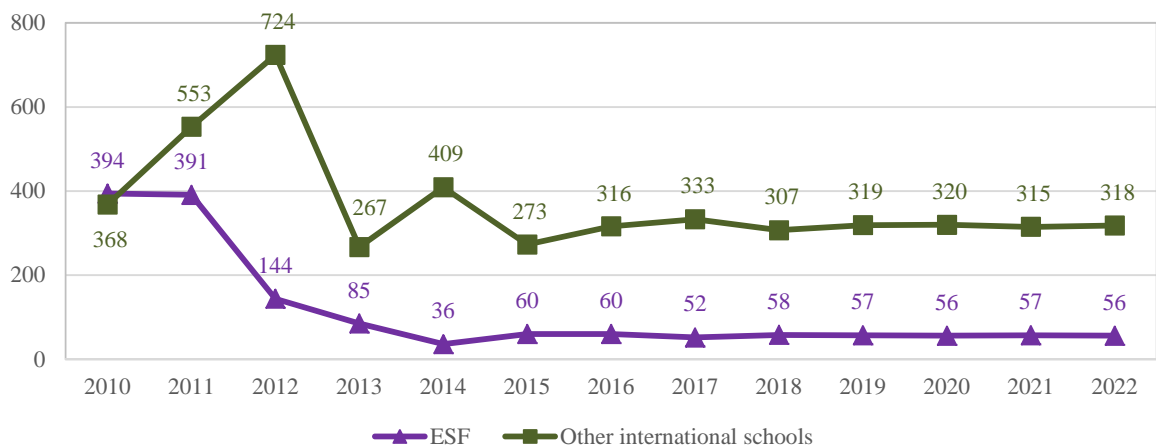
unmet number of applications placed on the waiting lists, which in turn represents the projected demand based on the waiting lists.

Chart 8.9: The actual (2010/11-2015/16) and projected (2016/17-2022/23) adjusted number of local and non-local students placed on the waiting lists of international primary schools



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Chart 8.10: The actual (2010/11-2015/16) and projected (2016/17-2022/23) adjusted number of local and non-local students placed on the waiting lists of international secondary schools



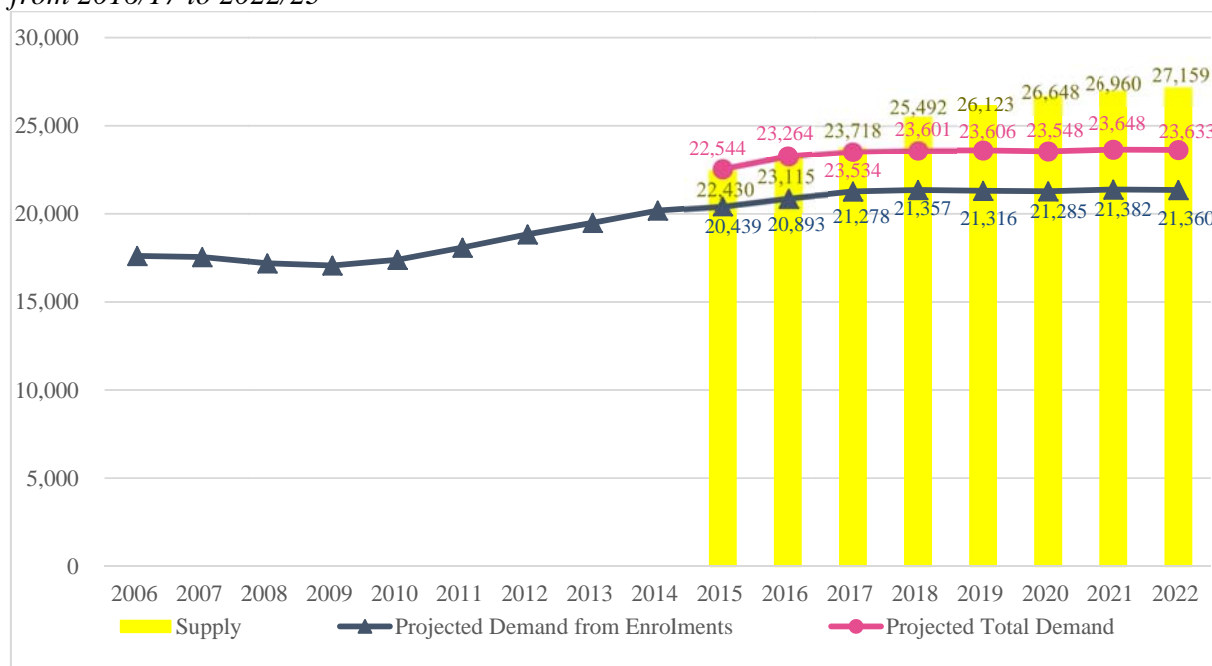
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Chapter 9 Adequacy of International School Places

9.1 ESF and other international schools at the primary level

9.1.1 Based on information provided by EDB, the future supply of international school places is projected to increase from 22 430 in 2015/16 to 27 159 in 2022/23 (+21%) at the primary level. It is estimated that, as shown in Chart 9.1 and Table 9.1 below, by 2022/23, the projected total supply at the primary level will be in excess of the projected total demand (i.e. sum of projections based on enrolment and applicants on waiting list) by 3 526 places at the primary level. The ratio of projected total demand to projected total supply will be 87.0% in 2022/23, which is slightly lower than the actual fill-up rate of primary places at 91.1% in 2015/16.

Chart 9.1: Projected demand and supply in ESF and other international schools at primary level from 2016/17 to 2022/23



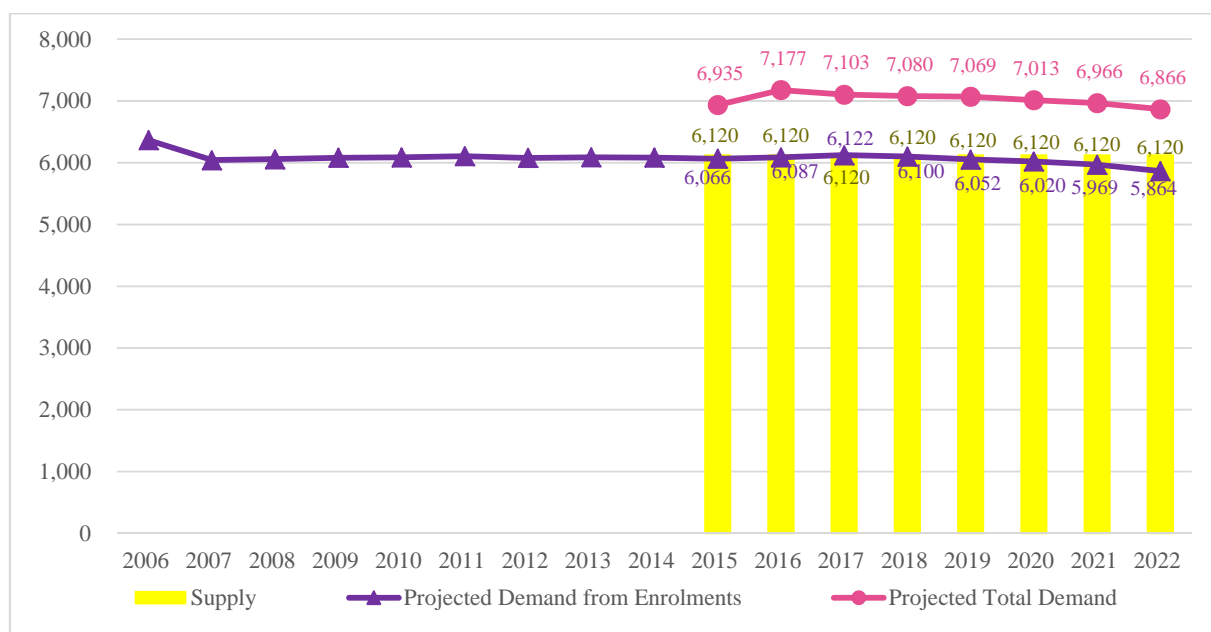
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Table 9.1: Projected demand and supply in ESF and other international schools at primary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	23 115	23 718	25 492	26 123	26 648	26 960	27 159
Projected Demand from Enrolments	20 893	21 278	21 357	21 316	21 285	21 382	21 360
Projected Total Demand	23 264	23 534	23 601	23 606	23 548	23 648	23 633
Surplus (+) / Shortfall (-)	-149	184	1 891	2 517	3 100	3 312	3 526
% of Surplus (+) / Shortfall (-) over Supply	-0.6%	0.8%	7.4%	9.6%	11.6%	12.3%	13.0%

9.1.2 The number of primary school places in ESF schools is expected to remain the same as the 2015/16 level by 2022/23 (i.e. 6 120). Since the projected decrease in demand for ESF school places from non-local students is less than the projected demand based on the waiting lists (which comprise mainly local children and non-local HKPR children), it is projected that there will still be a shortfall of primary school places at ESF schools by then, vis-à-vis an overall surplus provision of places in ESF and other international schools as a whole at the primary level (see Chart 9.2 and Table 9.2 below). However, it is possible that the further expansion of other international schools in the coming years will accommodate the need of non-local non-HKPR students who would otherwise be on ESF's waiting lists, as observed vide the trend of recent years. Besides, the phasing out of government subvention to ESF has started from P1 in 2016/17, leading to fee rise for non-subsidised levels from 2016/17 onwards. As a result, ESF's advantage over most of the other international schools in terms of school fee levels would decrease. In light of the above analysis, the projected shortfall in ESF places might be lower than expected.

Chart 9.2: Projected demand and supply in ESF at primary level from 2016/17 to 2022/23



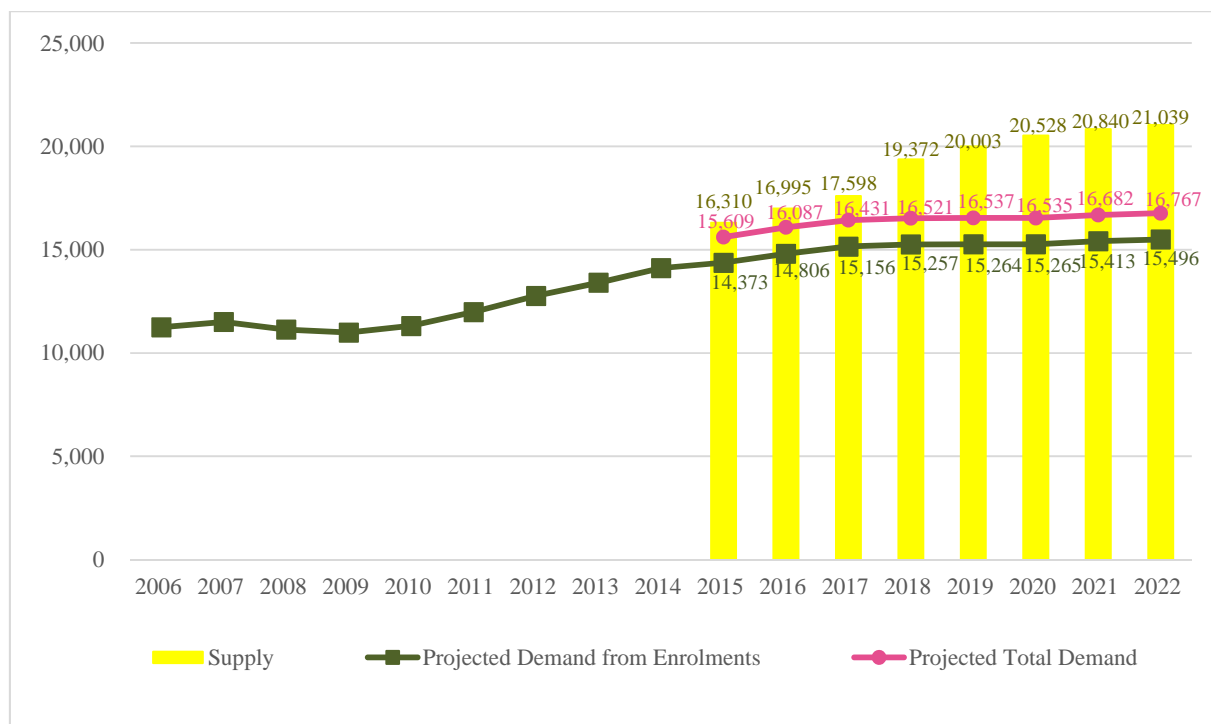
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Table 9.2: Projected demand and supply in ESF at primary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	6 120	6 120	6 120	6 120	6 120	6 120	6 120
Projected Demand from Enrolments	6 087	6 122	6 100	6 052	6 020	5 969	5 864
Projected Total Demand	7 177	7 103	7 080	7 069	7 013	6 966	6 866
Surplus (+) / Shortfall (-)	-1 057	-983	-960	-949	-893	-846	-746
% of Surplus (+) / Shortfall (-) over Supply	-17.3%	-16.1%	-15.7%	-15.5%	-14.6%	-13.8%	-12.2%

9.1.3 With the continued expansion of other international school places, the increase in school places at primary level from 16 310 in 2015/16 to 21 039 in 2022/23 (+4 729 or +29%) will outpace the projected increase in demand from both local and non-local students over the same period and absorbs all the projected demand from the waiting lists. There will be a surplus of 4 272 primary school places by 2022/23 (see Chart 9.3 and Table 9.3 below).

Chart 9.3: Projected demand and supply in other international schools at the primary level from 2016/17 to 2022/23



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

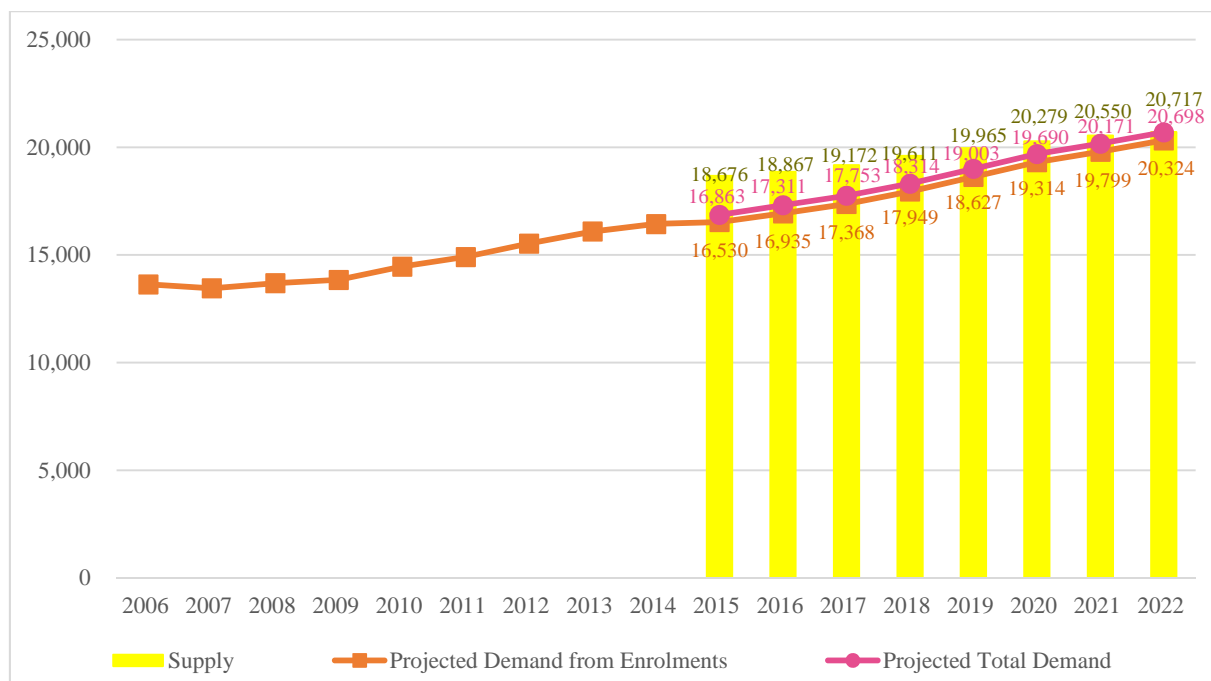
Table 9.3: Projected demand and supply in other international schools at primary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	16 995	17 598	19 372	20 003	20 528	20 840	21 039
Projected Demand from Enrolments	14 806	15 156	15 257	15 264	15 265	15 413	15 496
Projected Total Demand	16 087	16 431	16 521	16 537	16 535	16 682	16 767
Surplus (+) / Shortfall (-)	908	1 167	2 851	3 466	3 993	4 158	4 272
% of Surplus (+) / Shortfall (-) over Supply	5.3%	6.6%	14.7%	17.3%	19.5%	20.0%	20.3%

9.2 ESF and other international schools at the secondary level

- 9.2.1 The future supply of international school places is projected to increase from 18 676 in 2015/16 to 20 717 in 2022/23 (+11%) at the secondary level. It is estimated that, as shown in Chart 9.4 and Table 9.4 below, by 2022/23, the projected total supply and the projected demand (i.e. sum of projections based on enrollment and waiting list) at secondary level would be in balance. The ratio of projected demand to projected supply will be around 100%, vis-à-vis the actual fill-up rate of secondary international school places as a whole at 88.5% in 2015/16.
- 9.2.2 There is room for other international schools to further increase their fill-up rates, given the present moderate average fill-up rate of secondary school places, being at 88.5% in 2015/16. The moderate rate is mainly attributed to the net outflow of students at grades other than S1. Besides, it is projected that there will be a surplus of primary school places at other international schools, and some of these schools, especially schools offering both primary and secondary levels, could flexibly convert surplus primary school places to provide additional secondary school places. With such conversion, the ratio of projected total demand to projected total supply at secondary level could drop to well below 100% and there would be adequate supply of international school places at secondary level.

Chart 9.4: Projected demand and supply in ESF and other international schools at secondary level from 2016/17 to 2022/23



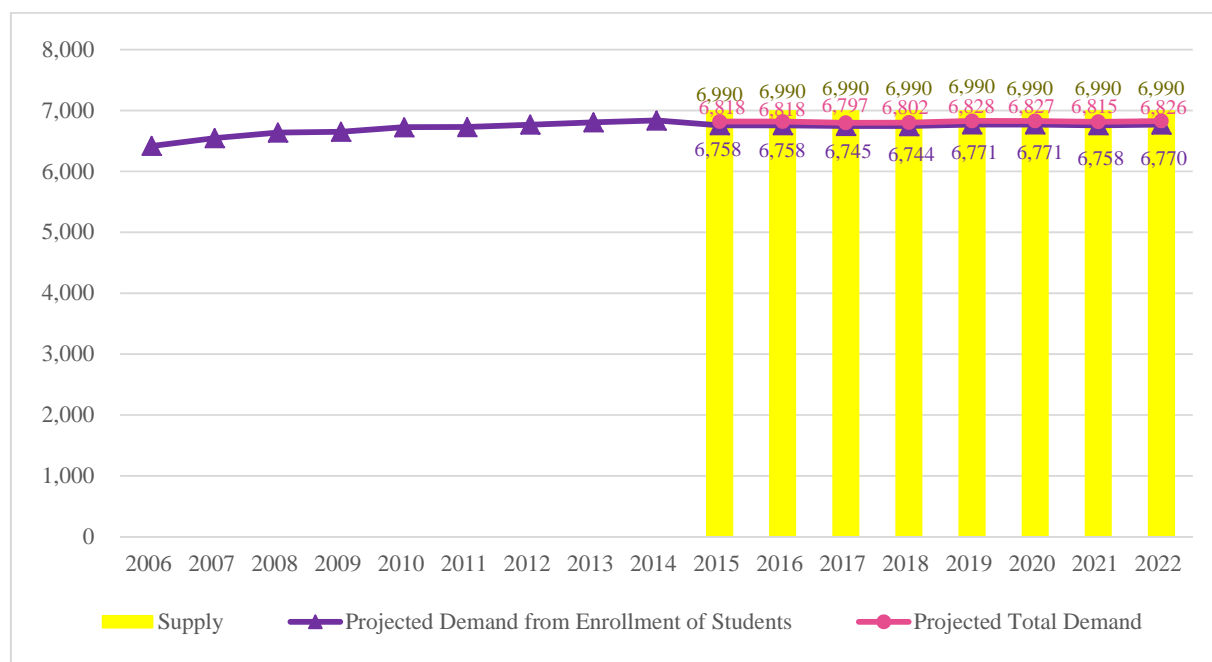
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Table 9.4: Projected demand and supply in ESF and other international schools at secondary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	18 867	19 172	19 611	19 965	20 279	20 550	20 717
Projected Demand from Enrolments	16 935	17 368	17 949	18 627	19 314	19 799	20 324
Projected Total Demand	17 311	17 753	18 314	19 003	19 690	20 171	20 698
Surplus (+) / Shortfall (-)	1 556	1 419	1 297	962	589	379	19
% of Surplus (+) / Shortfall (-) over Supply	8.2%	7.4%	6.6%	4.8%	2.9%	1.8%	0.1%

9.2.3 By comparing the projected demand for secondary school places at ESF schools with the corresponding projected supply as shown in Chart 9.5 and Table 9.5 below, it may be seen that there will be a small surplus of 164 places by 2022/23.

Chart 9.5: Projected demand and supply in ESF at secondary level from 2016/17 to 2022/23



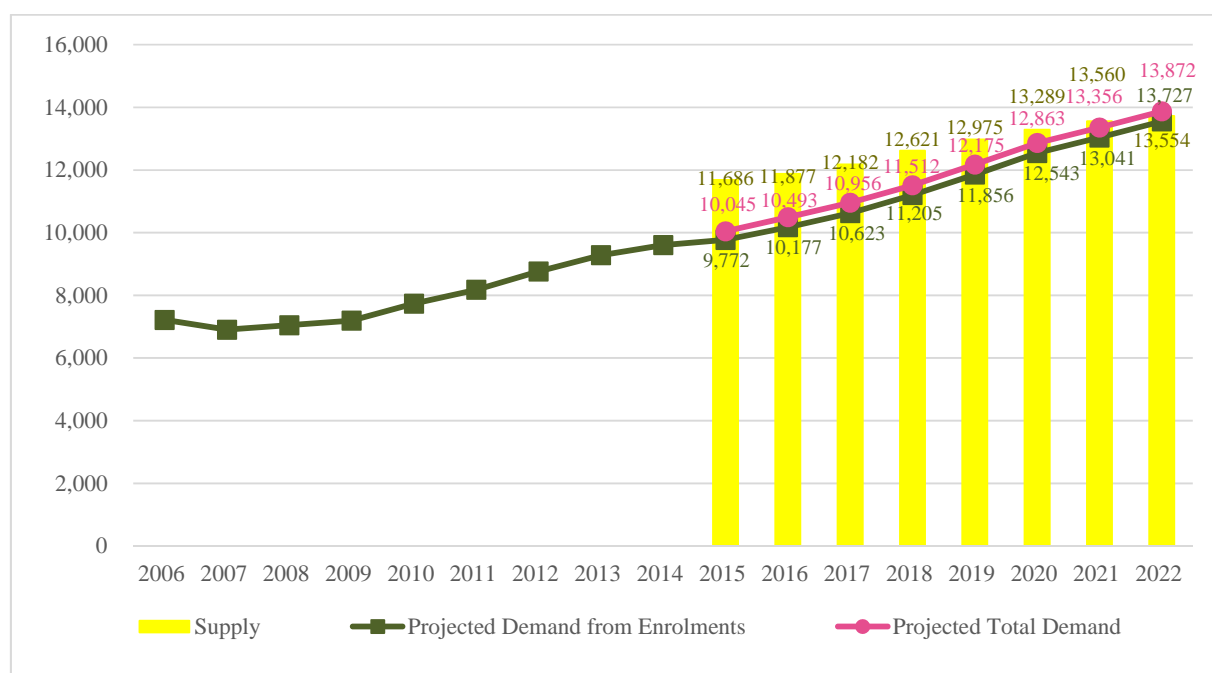
Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Table 9.5: Projected demand and supply in ESF at secondary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	6 990	6 990	6 990	6 990	6 990	6 990	6 990
Projected Demand from Enrolments	6 758	6 745	6 744	6 771	6 771	6 758	6 770
Projected Total Demand	6 818	6 797	6 802	6 828	6 827	6 815	6 826
Surplus (+) / Shortfall (-)	172	193	188	162	163	175	164
% of Surplus (+) / Shortfall (-) over Supply	2.5%	2.8%	2.7%	2.3%	2.3%	2.5%	2.3%

9.2.4 As regards provision of secondary school places in other international schools as shown in Chart 9.6 and Table 9.6 below, there will be a shortfall of 145 places in 2022/23 (vis-à-vis the projected surplus of 164 secondary school places in ESF schools).

Chart 9.6: Projected demand and supply in other international schools at secondary level from 2016/17 to 2022/23



Note: The year in the chart refers to the relevant school year. For example, “2015” represents the 2015/16 school year.

Table 9.6: Projected demand and supply in other international schools at secondary level from 2016/17 to 2022/23

School year	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23
Future Supply	11 877	12 182	12 621	12 975	13 289	13 560	13 727
Projected Demand from Enrolments	10 177	10 623	11 205	11 856	12 543	13 041	13 554
Projected Total Demand	10 493	10 956	11 512	12 175	12 863	13 356	13 872
Surplus (+) / Shortfall (-)	1 384	1 226	1 109	800	426	204	-145
% of Surplus (+) / Shortfall (-) over Supply	11.7%	10.1%	8.8%	6.2%	3.2%	1.5%	-1.1%

Chapter 10 Observations and Recommendations

10.1 Meeting the demand of international school places

10.1.1 At the primary level, there will be an overall shortfall of 149 places by 2016/17. With the planned increase in provision of places, it is projected that there will be an overall surplus of 3 526 international school places by 2022/23. Analysed by types of schools, there will be an excess demand of 1 057 places by 2016/17 and 746 places by 2022/23 in ESF schools. On the other hand, there will be a surplus provision of up to 908 places by 2016/17 and 4 272 places by 2022/23 in other international schools. While there will be an overall surplus in number of places, it is anticipated that a few schools would continue to be oversubscribed due to parental choice. Such phenomenon is also seen in the local school system.

10.1.2 At the secondary level, there will be an overall surplus of 1 556 places by 2016/17. It is projected that there will be an overall surplus of 19 international school places by 2022/23. In other words, there is also no projected shortfall at the secondary level.

10.1.3 Since no shortfall in both international primary and secondary school places is projected, the Government should closely monitor the supply and demand of international school places while facilitating the development of the international school sector.

10.1.4 As shown in Table 5.5, tuition fee does not stand out to be an important factor affecting parents' choice of school. However, among the 54 business establishments which had given suggestions on the admission arrangement of international schools that will help staff recruited or relocated from outside Hong Kong find international school places for their children when asked, 38% suggested that international schools should reduce fees or that the fees of international schools are too expensive (paragraph 7.3.2 refers). In addition, during discussions with principals, businesses and parents, concerns were expressed over the affordability of international school places. The profile of non-local workers with children in Hong Kong is changing, with increasing number of those being employed by SMEs which do not usually offer education allowances. These workers may have difficulties affording international schools that charge high level of fees.

Besides, big corporations are cutting their educational allowances, making it harder for their expatriate employees with children to afford international schools that charge high level of fees. It is therefore desirable if measures could be taken by the Government to address the concern.

Recommendation 1

10.1.5 Since no shortfall in both primary and secondary international school places is projected by 2022/23, the Government should closely monitor the supply and demand of international school places while facilitating the development of the international school sector.

Recommendation 2

10.1.6 In the findings of the current Study, tuition fee does not stand out to be an important factor affecting parents' choice of school. However, from the perspective of business establishments, lower fee level will help staff recruited or relocated from outside Hong Kong find international school places for their children. It is therefore recommended that amongst other factors, considerations also be given to the proposed fee level in future allocation of green field sites and/or vacant school premises for development of new international schools.

10.2 Provision of special education services

10.2.1 The aim of special education in Hong Kong, as a society promoting equal opportunities, is to provide children having SEN with special education services to help develop their potential to the full, achieve independence as much as they can, and adapt to the community well. Apart from local schools, some private schools including international schools also cater for SEN students in a non-local curriculum setting. Currently, in the international school sector, there is one special school operated by ESF to specifically cater for students with severe and complex SEN whereas other mainstream international schools (including ESF and other international schools) would cater for students with mild SEN.

10.2.2 During in-depth interviews with the business sector, some pointed out that expatriate staff with SEN children might not come to Hong Kong if their SEN children could not find a school providing adequate special education services. Parent survey also found that 27.6% of the parents with SEN students would leave Hong Kong if no place from schools offering non-local curriculum was available in Hong Kong. Therefore, the availability of special education services meeting the needs of non-local families with SEN children is a consideration to their decision of coming/staying in Hong Kong.

10.2.3 In addition, according to the parent survey, parents with SEN children attending the ESF special school at the primary and secondary levels indicated that the processing time from submission of applications to successful admission to the school were on average about 17.3 months and 14.2 months respectively, which are much longer than the average processing time for all international primary and secondary levels at 6.5 months and 5.4 months respectively. During focus group discussions with parents with SEN children attending international schools, they raised concern over the long waiting time for admission to the ESF special school. They also lamented that the special education support services provided by mainstream international schools were not sufficient. However, it is difficult to ascertain the actual demand for different types/level of special education services in international schools. The children of parents surveyed under the current Study are only those already admitted to international schools (with or without special education services).

Recommendation 3

10.2.4 *The current Study is not able to provide a comprehensive picture regarding the provision of special education services in international schools in Hong Kong, while it is noted that there were some concerns in this aspect. It is therefore recommended that the Government should conduct a further study on the provision of special education services in international schools in Hong Kong.*

Recommendation 4

10.2.5 *Given that the provision of special education services in international schools may influence the decision of some non-local families on whether to come to / stay in Hong Kong, it is recommended that the Government should continue to encourage the*

provision of special education services by existing and new mainstream international schools to cater for students with mild to moderate SEN in an integrated setting.

Recommendation 5

10.2.6 *Some parents with SEN children studying in mainstream international schools may find both international and local schools viable options²⁰, and findings of the current Study showed that being non-HKPR was the reason for not sending their children to local schools (including local special schools) (paragraph 6.2.9 refers) though in actual fact, eligible non-local non-HKPR residents in Hong Kong (e.g. non-HKPR children holding a dependent visa) are eligible to study in local schools. Hence, it is recommended that the Government should consider publicising the admission policy of local schools so that parents of non-local children may consider sending their children to local schools as an option.*

²⁰ 6 and 7 parents with SEN children studying in mainstream international schools at primary and secondary levels respectively considered both international schools and local schools viable options. Caution should be taken in interpreting the figures due to the small sample size.

Summary on the findings concerning Private Independent Schools (PIS)

1. In addition to the international schools, the school survey has covered four PISs and 134 parents with children studying in PISs as information was collated from PISs under the 2012 Study, and the major findings are set out in the ensuing paragraphs.

Findings from the survey with schools

2. Of the four PISs enumerated, all of them provided both primary and secondary education. It should be noted that the survey findings set out in the ensuing paragraphs only represent those responded to the survey. In 2015/16, there are a total of 7 PISs in Hong Kong offering non-local curriculum.

School admission mechanism

3. All of the enumerated PISs indicated that they had accorded priority to applicants with siblings studying in their school. 75.0% of them indicated that they had accorded priority to children whose parents were holders of debentures / nomination rights. 50.0% of the schools also stated that they had accorded priority to children of alumni and children of staff.
4. All of the enumerated PISs indicated that they had waiting list arrangement for applications for admissions. Among them, 75.0% included all applicants considered qualified for admission in the waiting list, whereas 25.0% only included applicants who are likely to have a chance of admission during the same school year. One school also had different arrangements for applications of different grades.
5. All of the enumerated PISs reported that, in the past year, they had enrolled students at the primary level from the waiting list, while 75.0% reported that they had enrolled students at the secondary level from the waiting list. The average percentage of students placed on the waiting lists who were subsequently admitted by the PISs is 26.1% for the primary level and 9.1% for the secondary level.

Future provision of school places

6. The coming seven years' plan for adjustment to provision of places was sought from the enumerated PISs. 75.0% of the schools indicated that they did not have plan to change their provision of places whereas 25.0% indicated that they had plans to do so. For the school having such plans, the measures to be adopted were "converting the use of some existing classrooms / special rooms", "in situ expansion in existing school site" and "applying for allocation of vacant school premises".

Findings from the survey with parents

7. A total of 134 parents with children studying in PISs were enumerated. The findings for this part of the survey have been grossed up statistically to represent views from all parents of PIS students.

Parents' preference for types of schools

8. Parents' preferences (expressed as percentage of parents indicating that they highly preferred or preferred) for different types of schools for their children were acquired. It is noted that at the primary level, 84.2% of parents with children studying in PISs highly preferred or preferred ESF or other international schools and that for PISs is 58.7%. For parents with children studying in PISs at secondary level, the respective rates are 92.7% and 66.0% respectively. The findings suggest that some of the parents may consider PISs as an alternative to enrolment in international schools at the time of application and eventually their children got admitted to PISs.
9. Analysing by residency status, about 89.2% of parents with local children studying in PISs highly preferred or preferred ESF or other international schools while the percentage for parents with non-local children studying in PISs is 91.3%. Concerning preference for PISs, about 63.0% and 63.1% of parents with local and non-local children studying in PISs highly preferred or preferred PISs. On the other hand, schools under Direct Subsidy Scheme, private schools offering non-local curriculum and local government or aided schools are less preferred by both parents with local and non-local children.

Application process

Average processing time taken from submission of application to successful admission

10. It took about 7.20 months on average from submission of applications to successful admission to PISs at the primary level. For the secondary level, the average processing time was 5.38 months. Relevant findings analysed by residency status are shown in Table 1 below.

Table 1: Average processing time (months) taken from submission of applications to successful admission analysed by residency status of the children

		Average processing time (months)	
		Primary	Secondary
Children as	Local Students	8.53	4.95
	Non-local students	5.90	5.65

Average number of applications submitted

11. On average, including the schools in which their children were currently studying, parents with children studying in PISs at the primary level indicated that they had applied for 2.15 schools (including both international schools and PISs) at the time of admission and that for secondary level was 2.25 schools. If only applications that were placed on the waiting list are counted (i.e. excluding the schools in which their children were currently studying at), the average number of schools applied for was 1.35 at the primary level and 2.31 at the secondary level.

Difficulties encountered in finding international school / PISs places

12. The difficulties encountered by parents in finding international school / PISs places for their children attending PISs are shown in Table 2 below:

Table 2: % of parents encountering difficulties in finding international school / PISs places

Difficulties/problems encountered	Parents with children attending PISs at primary level	Parents with children attending PISs at secondary level
Waiting time for international schools / PISs I prefer is too long	33.1%	29.9%
International schools / PISs I prefer are located too far from our place of residence	25.3%	36.5%

Difficulties/problems encountered	Parents with children attending PISs at primary level	Parents with children attending PISs at secondary level
It is difficult for the children to get admitted to international schools / PISs early in advance before my family members come to Hong Kong	8.1%	10.3%
Much time is required in applying for several international schools / PISs in order to increase the chance of being admitted into international schools	26.4%	20.1%
Little information is available on the quality of teaching in different international schools / PISs	20.1%	37.4%
Some schools do not provide services for students with special educational needs ¹	0.5%	0.5%
Some schools do not have sufficient facilities for students with special educational needs ¹	0.0%	0.5%
Other problems ²	1.9%	10.3%
No problem has been encountered	32.4%	23.9%

Note: Parents may choose more than one option for the question concerned and hence the percentages above do not add up to 100%.

Parents' preference for types of curriculum

13. For both primary and secondary education, parents indicated that the quality of teaching staff was the most important factor affecting their choice of schools, regardless of residency status of their children. Please see Table 3 below for details.

Table 3: % of parents by perceived importance of factors affecting choice of school

Factors		% giving the score of							Total*	Mean score
		1	2	3	4	5	6	7		
		Most important ←—————> Least important								
Location	Local	6.6	4.7	9.9	12.4	26.7	35.6	3.9	100	4.7
	Non-local	17.0	7.8	7.1	10.5	22.2	34.3	1.1	100	4.2
	Total	11.9	6.3	9.6	11.2	24.5	34.2	2.3	100	4.4
Curriculum	Local	34.7	26.9	7.4	19.4	7.6	3.9	0.0	100	2.5
	Non-local	26.4	20.1	12.7	34.5	1.5	2.5	2.3	100	2.8
	Total	30.3	24.2	10.0	27.0	4.2	3.1	1.2	100	2.7
Quality of teaching staff	Local	14.8	46.8	16.2	12.9	5.3	3.9	0.0	100	2.6
	Non-local	30.6	24.1	34.1	7.8	0.0	3.4	0.0	100	2.3
	Total	24.2	34.5	25.4	9.9	2.4	3.6	0.0	100	2.4

¹ This entry reflects response provided by parents with SEN children only.

² Other problems include affordability, fierce competition and unclear interview details.

Factors		% giving the score of							Total*	Mean score
		1	2	3	4	5	6	7		
		Most important ←————→ Least important								
Reputation	Local	17.6	9.4	41.0	10.3	17.3	3.0	1.3	100	3.1
	Non-local	6.0	26.7	28.3	12.1	20.0	5.9	1.1	100	3.4
	Total	11.1	18.3	34.1	11.0	18.4	5.8	1.1	100	3.3
Prospect of graduates	Local	13.1	5.3	7.8	28.6	17.3	26.3	1.5	100	4.2
	Non-local	12.3	11.2	8.6	23.6	22.5	21.8	0.0	100	4.0
	Total	12.4	8.3	8.1	26.0	21.1	23.4	0.7	100	4.1
Tuition fee	Local	7.7	5.3	17.6	16.4	25.7	27.1	0.3	100	4.3
	Non-local	3.4	10.1	9.2	11.5	33.7	31.1	1.1	100	4.6
	Total	5.2	7.7	12.8	14.8	29.4	29.3	0.7	100	4.5

*Rounded to the nearest integer. For a particular factor, those parents without indicating ranking are excluded.

14. In addition, for children attending PISs at the primary level, a greater proportion of their parents highly preferred or preferred their children to study the International Baccalaureate (IB) curriculum (93.0%) whereas a relatively lower proportion of parents highly preferred or preferred their children to study the UK-based curriculum (49.9%) and the national curriculum of their original country (26.3%).
15. For children attending PISs at the secondary level, a greater proportion of their parents highly preferred or preferred their children to study IB curriculum (95.3%) whereas a relatively lower proportion of parents highly preferred or preferred their children to study the UK-based curriculum (53.8%) and the national curriculum of their original country (22.9%). Relevant findings and analysis by local/non-local students are shown in Tables 4 and 5 below.

Table 4: % of parents' preference (highly preferred or preferred) on curriculum for students attending PISs

Curriculum highly preferred or preferred	Parents with children attending PISs at primary level	Parents with children attending PISs at secondary level
International Baccalaureate curriculum	93.0%	95.3%
UK-based curriculum (e.g. IGCSE)	49.9%	53.8%
National Curriculum of country of origin	26.3%	22.9%
Local curriculum	12.3%	9.8%

Note: Parents may choose more than one highly preferred or preferred option and hence the percentages above do not add up to 100%.

Table 5: % of parents' preference (highly preferred or preferred) on curriculum analysed by the residency status of the children attending PISs

Curriculum highly preferred or preferred	Parents with children attending PISs at primary level		Parents with children attending PISs at secondary level	
	Local students	Non-local students	Local students	Non-local students
International Baccalaureate curriculum	90.2%	95.4%	94.5%	95.8%
UK-based curriculum (e.g. IGCSE)	63.9%	38.0%	64.4%	48.3%
National Curriculum of country of origin	N/A	49.2%	N/A	41.5%
Local curriculum	8.3%	16.3%	11.1%	9.3%

Note: Parents may choose more than one highly preferred or preferred options and hence the percentages above do not add up to 100%.

Parents' decision when there was no place from schools offering non-local curriculum

16. Parents of local and non-local students attending PISs would make different decision when there was no place from schools offering non-local curriculum. More than 50% of the parents of local students at the primary level and more than 40% of parents of local students at the secondary level would send their children to attend local schools while the corresponding percentage for parents of non-local students is 27.8% and 21.2% respectively for the primary and secondary level. Furthermore, about 30% of non-local students at both the primary level and secondary level indicated that their whole families would leave Hong Kong should no place at schools offering non-local curriculum be available.

Table 6: % of parents by decision when there was no place from schools offering non-local curriculum analysed by the residency status of their children attending PISs

Decision of parents if there was no place from schools offering non-local curriculum	Parents with children attending PISs at primary level		Parents with children attending PISs at secondary level	
	Local students	Non-local students	Local students	Non-local students
My whole family will leave Hong Kong	7.3%	30.9%	17.8%	28.0%
My family will stay in Hong Kong while my children will go abroad	11.2%	4.6%	12.2%	8.5%
I will stay, but my spouse and children will leave Hong Kong	2.4%	2.3%	0.0%	0.0%
My whole family will stay, and we will send our children to attend local schools	51.2%	27.8%	41.1%	21.2%
Not decided yet	22.9%	29.4%	28.9%	33.1%

Decision of parents if there was no place from schools offering non-local curriculum	Parents with children attending PISs at primary level		Parents with children attending PISs at secondary level	
	Local students	Non-local students	Local students	Non-local students
Refused to answer	4.9%	5.0%	0.0%	9.3%
Total	100.0%	100.0%	100.0%	100.0%

Plan to stay in Hong Kong

17. About 10.4% and 7.0% of parents with children studying in PISs at the primary level and secondary level respectively planned to leave Hong Kong in the coming seven years. Relevant findings are shown in Table 7 below. The above percentages should be interpreted with caution as considerable percentage of parents responded that they had no comments.

Table 7: % of parents by whether they planned to leave Hong Kong in coming seven years

Plans to leave Hong Kong	Parents with children attending PISs at primary level	Parents with children attending PISs at secondary level
I have no plan to leave Hong Kong	53.5%	58.0%
I have plan to leave Hong Kong in the coming seven years	10.4%	7.0%
Others ³	0.5%	4.7%
No comment	35.6%	30.3%
Total	100.0%	100.0%

18. No and 5.5% of parents with local children attending PISs at the primary and secondary level respectively indicated that they planned to leave Hong Kong in the coming seven years. For parents with non-local children studying in PISs, the corresponding figures are 20.5% and 8.5% at the primary and secondary level respectively. Relevant findings are shown in Table 8 below.

Table 8: % of parents by comment on length of stay in Hong Kong analysed by the residency status of their children

Comments on length of stay	Parents with children attending PISs at primary level		Parents with children attending PISs at secondary level	
	Local Students	Non-local Students	Local Students	Non-local Students
I have no plan to leave Hong Kong	61.0%	45.3%	58.9%	60.1%

³ “Others” refers to those who have indicated a plan to leave Hong Kong, but have no concrete timeframe in mind.

Comments on length of stay	Parents with children attending PISs at primary level		Parents with children attending PISs at secondary level	
	Local Students	Non-local Students	Local Students	Non-local Students
I have plan to leave Hong Kong, with breakdown by length of stay:				
For around 1-2 years	0.0%	20.5%	5.5%	8.5%
For around 3-5 years	0.0%	0.0%	0.0%	0.0%
For around 6-7 years	0.0%	5.5%	5.5%	4.2%
Others ⁴	0.0%	15.0%	0.0%	4.2%
No comment	0.0%	1.0%	0.0%	8.5%
	39.0%	33.3%	35.6%	22.9%
Total	100.0%	100.0%	100.0%	100.0%

Findings on the Provision of Special Education Services

Schools' views on provision of special education services

Provision of school places for students with special educational needs (SEN)

19. 75.0% of the enumerated PISs indicated that they had provided special education services to children with SEN and the major types of SEN catered by these schools were Specific Learning Difficulties in Reading and Writing (100.0%), Attention Deficit/Hyperactivity Disorder (66.7%) and Autistic Spectrum Disorders (66.7%).

Admission policy for SEN students

20. 50.0% of the enumerated PISs indicated that they had admission policy for SEN students and the policies included “confining to students with mild SEN” and “only particular types of SEN students will be admitted”.

Collection of additional fees from students receiving special education service

21. None of the enumerated PISs that had admitted students with SEN collected additional fees from students receiving education services provided by the schools.

⁴ “Others” refers to those who have indicated a plan to leave Hong Kong, but have no concrete timeframe in mind.

Difficulties encountered in providing special education services

22. Among the enumerated PISs admitting students with SEN, all of them replied that they had encountered difficulties in providing special education services. They indicated that some students with SEN required intensive support services for which the school might not be able to fully meet the cost and they had difficulties in financing the cost involved in providing special education services. Furthermore, 66.7% indicated that the progress of learning and teaching for other non-SEN students would be affected by diverting staff resources to provide special education services and they had difficulties in recruiting staff with training in special education.

Parents' views on provision of special education services⁵

Residency status and parents' preference for school and aided special school

23. Among the 26 parents with SEN children completing the parent questionnaires with additional questions on SEN, 11 of them are with non-local SEN children while 15 of them are with local SEN children.
24. 31.7% and 0.0% of the parents with SEN children studying in PISs at the primary and secondary level respectively preferred or highly preferred the ESF special school at the time of application, while 92.5 and 100% preferred ESF or other international schools. This indicates that most of the parents preferred ESF or other international schools to the ESF special school.

Reasons for sending SEN children to study in international schools / PISs

25. For parents with SEN children studying in PISs, the main reasons for sending their children to study in PISs or international schools included “more flexible/interactive learning in international school / PISs” (92.5% and 94.1% for primary and secondary level respectively), “more relaxed learning environment and less study pressure in international school / PISs” (85.0% and 75.3% respectively) and “quality of learning and teaching is better in international schools / PISs” (73.8% and 56.5% respectively).

Difficulties encountered in finding places in international schools / PISs

26. Among parents with SEN children studying in PISs at the primary level, the major difficulties encountered in finding international school / PISs places for

⁵ Caution should be taken in interpreting the figures in this section due to the small sample size (26 parents with SEN children studying in PIS).

their children included “waiting time for international schools / PISs I prefer is too long” (58.8% of parents concerned) and “international schools / PISs I prefer are located too far from our place of residence” (50.4%). For parents with SEN children attending PISs at the secondary level, the majority (76.2%) has not encountered any problem.

Whether the parents and/or their families would leave Hong Kong if no places from schools offering non-local curriculum was available in Hong Kong

27. About 28.0% of the parents with SEN children attending PISs at the primary level would leave Hong Kong if there were no place available in schools offering non-local curriculum. Separately, for parents with SEN children studying at the secondary level in PISs, more would choose to send their children to attend local school than to leave Hong Kong if no place from schools offering non-local curriculum was available. Relevant findings are shown in Table 9 below. It should be noted that a significant proportion of the parents have not decided on this question, and the finding should be interpreted with caution.

Table 9: % of parents with SEN children by whether they (and their families) would leave Hong Kong if no place from schools offering non-local curriculum was available in Hong Kong

Whether to leave Hong Kong if no place from schools offering non-local curriculum was available	% of parents with SEN children					
	Primary			Secondary		
	Local	Non-local	Total	Local	Non-local	Total
My whole family will leave Hong Kong	0.0%	44.7%	28.0%	20.0%	100.0%	24.7%
My whole family will stay, while we will send our children to attend local schools	50.0%	0.0%	18.7%	40.0%	0.0%	37.6%
My family will stay in Hong Kong and my children will go abroad	30.0%	0.0%	11.2%	20.0%	0.0%	18.8%
I will stay, but my spouse and children will leave Hong Kong	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Not decided yet	20.0%	43.3%	34.6%	20.0%	0.0%	18.8%
Refused to answer	0.0%	12.0%	7.5%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Consideration on selection of different types of schools

28. For those parents with SEN children studying in PISs at the primary level who considered both PIS and local schools options for consideration, the main reasons for not sending their children to local schools (including local special schools)⁶ were being non-HKPR (35.1% of concerned parents) and the belief that studying at international schools would offer better prospects (32.5%).

⁶ 7 and 1 parents with SEN children studying in PISs at primary and secondary levels respectively considered both PISs and local schools viable options. Caution should be taken in interpreting the figures due to the small sample size.