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Jean Daruvala
Academic Director

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Saudi’s diversity

Despite well documented demand for the USA among Saudi students, many have sought alternative language destinations such as the UK and New Zealand according to our Agency Survey. Meanwhile, higher education appears to be big business.

**Market growth**
Only six agencies participated in our first ever Agency Survey on Saudi Arabia (although the total market size is small anyway) but almost all agents reported a surge in the number of students opting to study abroad – although one agency did not disclose the amount of students it sent overseas in 2007. Five agencies reported a business growth of between 20 and 200 per cent while one agent noted business had decreased by as much as 80 per cent in the last 12 months. Business growth was far from stunted, however, coming in at 37 per cent overall.

**Language and destination trends**
In 2005, US President Bush and Saudi Crown Prince Abdullah drew up an agreement that called for a greater exchange of students between the USA and Saudi Arabia, a wish that was certainly fulfilled. The latest Open Doors report indicates a huge surge in Saudi students at English language schools in the USA thanks to the introduction of government scholarships (see page six). However, the UK was conversely the most popular study destination last year, according to our survey respondents, with a 52 per cent share of the student market. Perhaps US-bound students apply through different channels for study abroad, as the USA polled just three per cent. English appeared to be the preferred language of choice among Saudi Arabian students, accounting for 98 per cent of all agency bookings, however, German and French made up 2 per cent respectively. Average length of stay among Saudi students was 13 weeks.

**Student and course trends**
Higher education placements generate a lot of agency business, with an estimated 35 per cent of clients interested in studying at a foreign university, just behind the 38 per cent of clients requesting language courses overseas. And a majority of students learn a language for further studies overseas – 55 per cent. Meanwhile, 33 per cent were learning a language for current or future work purposes. Saudi Arabian students opted for an in-depth form of learning with intensive language programmes accounting for 40 per cent of the student base, however, general language programmes polled second place with 29 per cent. In addition, summer programmes and university foundation courses proved fairly popular, achieving 12 per cent and eight per cent respectively. Average length of stay among Saudi students was 13 weeks.

**Agency business**
Our agents reported that word-of-mouth recommendation was responsible for 37 per cent of new business, while press advertising is also a valid form of recruitment in Saudi Arabia and attracted 24 per cent of business last year. In terms of finding new school partners, the Internet was most useful, leading to 34 per cent of new business relationships.

**Looking ahead**
Most agents forecast continued business growth for 2008. The benefits of studying abroad remain apparent and with the King Abdullah Scholarships Programme (Kasp) launched for the 2007-2008 academic year, Saudi students can now benefit from a scholarship programme that aims to send 5,000 students abroad each year to the USA, Canada, Australia, New Zealand, Korea, China and India.

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**Most popular courses**

1. Language progs 38%
2. Higher ed 38%
3. Work & travel 19%
4. Language & work exp. 2%
5. Business 2%
6. Intensive 40%
7. General 29%
8. Junior 2%
9. Academic prog. 5%
10. University found. 8%
11. Summer vacation 12%
12. Other 8%

**Economic overview**
- Strong oil prices and historically high output levels will enable the government to raise public spending, particularly on capital projects. These are projected to decline from 19 per cent of GDP in 2007 to 5.7 per cent of GDP in 2012.
- Despite high oil export earnings, strong import growth will push down the trade surplus. This will lead to a narrowing of the current-account surplus to an estimated 6.1 per cent of GDP in 2012.
- Demand for homes in the kingdom exceeds supply, mainly because 70 per cent of the population is below the age of 30. Land prices rose between 20 and 40 per cent in 2006. In Riyadh, the price per square metre was US$106 - US$340.

**Top destinations**

1. UK 52%
2. New Zealand 15%
3. Canada 13%
4. Australia 12%
5. USA 3%
6. Other 5%

**How do agencies find new schools to represent?**

1. Internet 34%
2. Fairs and expos 18%
3. LTEMETM 10%
4. Workshops 6%
5. Other 32%

**How do agencies recruit students?**

1. Word of mouth 27%
2. Advertising in press 24%
3. Website 16%
4. Seminars to students 4%
5. Mail shots 2%
6. Seminars to students 1%

**Key points**
- The total number of students placed by five of the six agencies in our survey was 4,125
- Individual agencies placed between 100 and 3,000 students on courses per year
- Average business growth was 37 per cent in the last 12 months
- The average length of stay for Saudi Arabian students was 13 weeks
- Overall, 57 per cent of Saudi Arabian students stayed in host family accommodation when studying overseas
- The UK was the most popular destination for Saudi Arabian students, followed by New Zealand and Canada
- On average, each agency worked with 31 schools in the last 12 months
Saudi Arabian agents named a range of language programmes they work with, including, in the UK:
Anglo European School of English, Bournemouth; Beet Language Centre, Bournemouth.

Worldwide:
Eurocentres, various; EC, various; EF, various; Kaplan Aspect, various.

Thank you to the following agencies for taking part in this survey:

| Percentage of agents who recognised each of the following organisations |
|---------------------------|-----------------|-----------------|
| Australia                 | Acpet 17%        | EA 33%          |
| Canada                    | Capls 50%        | CLC 67%         |
| France                    | Souffle 0%       | L’Office 0%     |
|                          | Unsel 0%         | FLE 0%          |
| Ireland                   | MEI=Relsa 0%     | IEAI 0%         |
| Italy                     | Asils 0%         | Italian in Italy 0% |
| New Zealand               | Ed. NZ 50%       | English NZ 83%  |
| Portugal                  | Aeple 0%         |                 |
| South Africa              | Eltasa 0%        | English SA 17%  |
| Spain                     | Fedele 0%        |                 |
| UK                        | ABLS 17%         | English UK 50%  |
| Europe                    | Equals 0%        | British Council 100% |
| USA                       | AAIEP 0%         | Accet 40%       |
|                          | CEA 17%          | UCIEP 0%        |
| International             | Ialc 0%          | Quality English 17% |
|                          | Tandem 0%        | |

Hand picked from the best English language schools

United Kingdom
- Anglo European School of English, Bournemouth
- CAMBRIDGE ACADEMY OF ENGLISH
- CHURCHILL HOUSE, RAMSGATE
- EASTBOURNE SCHOOL OF ENGLISH
- ECCLESLEY OXFORD
- ENGLISH LANGUAGE CENTRE, BRIGHTON AND HOVE
- EXCEL ENGLISH, LONDON
- FRANCES KING SCHOOL OF ENGLISH, LONDON
- HAMPTSTEAD SCHOOL OF ENGLISH, LONDON
- ILS ENGLISH, NOTTINGHAM
- LAKE SCHOOL OF ENGLISH, OXFORD
- THE LANGUAGE PROJECT, BRISTOL
- LEWIS SCHOOL OF ENGLISH, SOUTHAMPTON
- LONDON SCHOOL OF ENGLISH, LONDON
- MELTON COLLEGE, YORK
- WIMBLEDON SCHOOL OF ENGLISH, LONDON

New Zealand
- Auckland English Academy
- Languages International, Auckland and Christchurch
- Rotorua English Language Academy (RELA)

Canada
- Access International English Language Centre, Toronto
- Vancouver English Centre

South Africa
- Interlink School of Languages, Cape Town

Malta
- Clubclass Residential Language School
- Global Village English Centre

Bosnia
- Soros School, Sarajevo

Poland
- York School, Krakow

Turkey
- British Side

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