

Talking progress... Talking quality



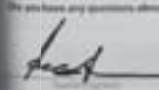
Me and my teacher in our one to one progress meeting

Academic Progress Diary

Janaina Gomes

Approved by the
BRITISH COUNCIL

malvernhouse
College

Attendance	94%
Participation	Excellent
Homework	Good quality
Expectations	To go to University
Comments	She is very cooperative, speaks a lot in class and is showing great progress overall. Needs to practise listening. Try UK TV and radio.
Do you have any questions about living in London for our offshore team? <input type="checkbox"/>	
 25/02/08	
YOUR NEXT STEP You are invited to... Post back separately!	



Jean Daruvala
Academic Director

“78 dedicated teachers committed to academic quality”

“Our aim: To deliver progress to every Malvern House student

Solution: A Progress Diary to track your student’s writing, listening and speaking skills”

“Talk to your Team”

Stephan Roussounis • Business Development Director
South America and the Middle East • stephan@malvernhouse.com

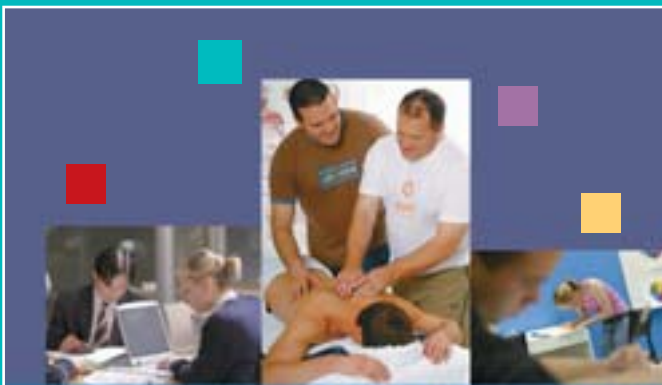
Ann Hawkings • Business Development Manager
Western Europe and the Far East • ann@malvernhouse.com

Elena Roginsky • Marketing Executive
Eastern Europe and Central Asia • e.roginsky@malvernhouse.com



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 CRICOS Provider Numbers:
 02501G; 02427A; 02573B

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Australian Child Care Career Options (ACCCO) is a well-established industry recommended training organization providing quality education in practical requirements of Children's Services. Visit www.accco.com.au



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Group Colleges Australia (GCA) is a consortium of educational institutions comprising Central College, Metro English College, St. James College, and the Australian Institute Of Workplace Learning.



LANGUAGE LINKS

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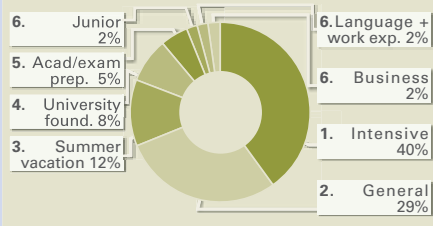
ACPET is the national association for private providers of post-compulsory education and training. ACPET colleges are accredited and quality assured by Australian government authorities, offering security, flexibility and education pathways.



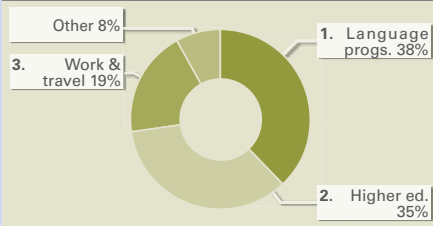
Saudi's diversity

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.

Most popular courses



Average percentage agency business

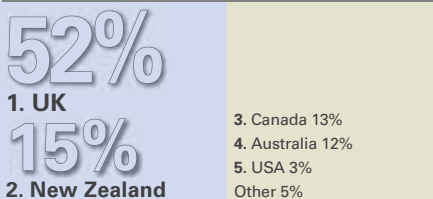


Economic overview

- 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.

Sources: *The Economist* and *AME Info*

Top destinations



How do agencies find new schools to represent?



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.

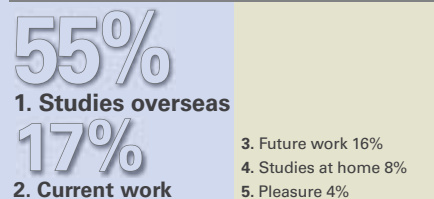
Language and destination trends

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 a slight dent in the statistics, each accounting for one per cent of all student applications.

Student and course trends

Higher education placements generate a lot

Reasons for language travel



How do agencies recruit students?



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

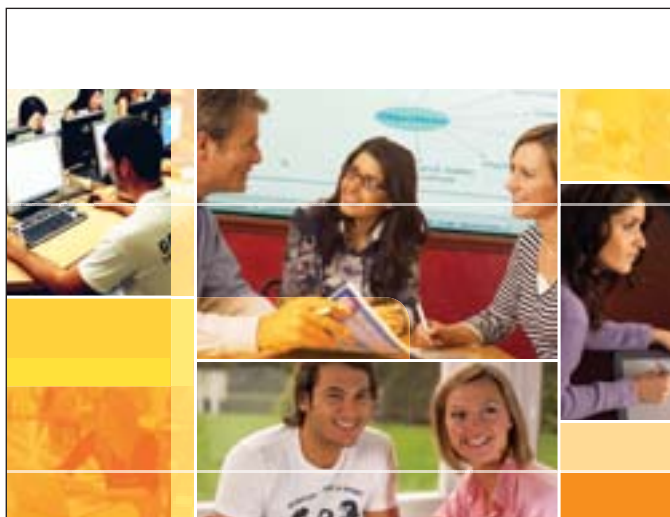
of agency business, with an estimated 35 per cent of clients interested in studying at a foreign university, just behind the 38 per cent of clients requesting language courses overseas. And a majority of students learn a language for further studies overseas – 55 per cent. Meanwhile, 33 per cent were 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.



Hand picked from the best English language schools

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English
- Churchill House, Ramsgate
- Eastbourne School of English
- Eckersley Oxford
- English Language Centre, Brighton and Hove
- Excel English, London
- Frances King School of English, London
- Hampstead 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

Ireland

- ATC Language and Travel, Bray, Dublin
- Cork English College
- The Linguaviva Centre, Dublin

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

QE schools together run hundreds of different English language programmes worldwide, greater in variety and choice of location than any other group.

Agents can be sure of

- a fast and flexible response
- a strong partnership with the decision makers
- a commitment to individual service and attention

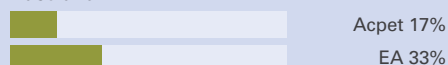
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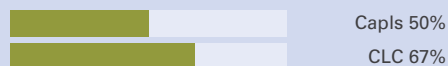
Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations

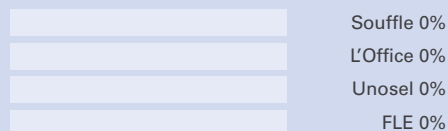
Australia



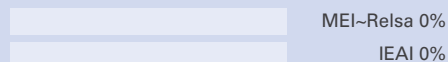
Canada



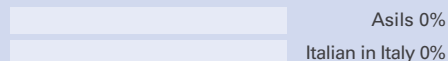
France



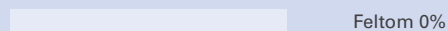
Ireland



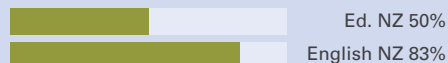
Italy



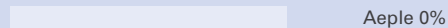
Malta



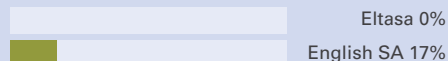
New Zealand



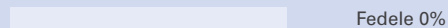
Portugal



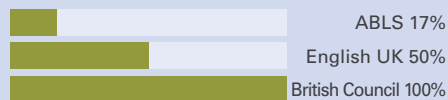
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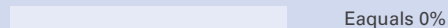
Spain



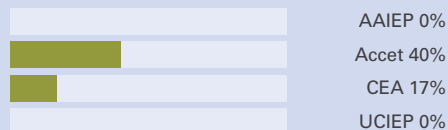
UK



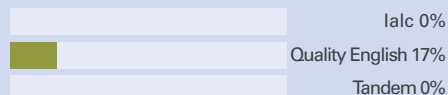
Europe



USA



International



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: Al Amoudi Travel Agency, Sameerah Corporation, Almarefth Agency, IDP Education Pty Ltd, AZZ Management, Matoolah for Tourism.