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MARKETING

CONFERENCE 2015

Opportunities for the ELT sector to improve their market share in the Gulf

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GeoXoLabs



ELT Market - Kuwait

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Kuwait



Briefing Agenda

- Country Profile - Demographics
- Education system
- UK ELT Market in Kuwait - Analysis
- ELT provision
- ELT opportunities in Kuwait
- UK Institutions marketing techniques
- SIEM in Kuwait

Country profile - Kuwait

Government

Independence in 1961

The head of state is the Amir/Sheikh

Key positions held by members of ruling family

System of government is monarchical and constitutional.

The number of the assembly members is 50, chosen by people

every 4 years through free and fair elections

Minister of Higher Education, Dr Badr Al Essa



Economy

Estimated 10% of the world's oil reserves

Oil has dominated the economy, making up around 85% - 90% of export revenues

\$128 billion development plan in place for next 4 years

Inflation currently running around 10-11%

GDP per capita \$60,664 (2013 estimate) - 10th highest in world (world bank)



Kuwait - Demographics

Population estimated at 3.9 million; Kuwaiti citizens approximately 1.38 million

Population growth is around 1.883%

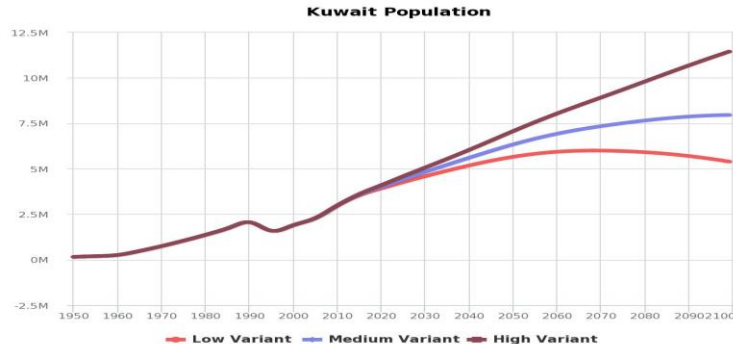
Young population – majority still in 15-59 age bracket, median age 30 years

Age structure (2011 est.):

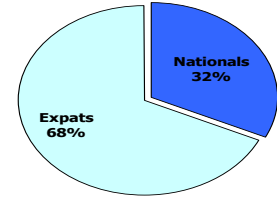
- 0-14 years: 26%
- 15-64 years: 73%
- 65 years and over: 1-2%

Adult literacy rate: 94%

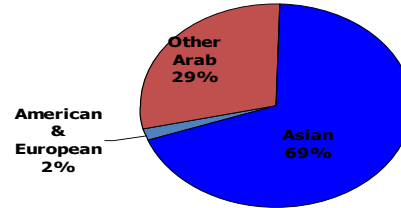
The average monthly household income of Kuwaitis is \$ 5,300, (three times the worlds highest rate)
Public sector wages rose by 30% in 2011 and calls for similar raise were made in 2012, and in



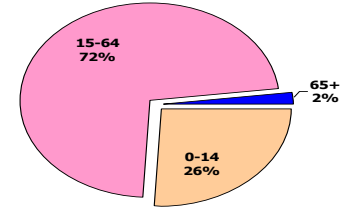
Population Split By Ethnic Group



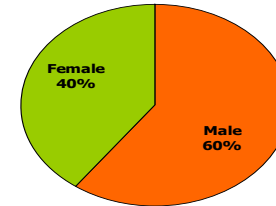
Foreign Population Split By Nationality



Population Split By Age

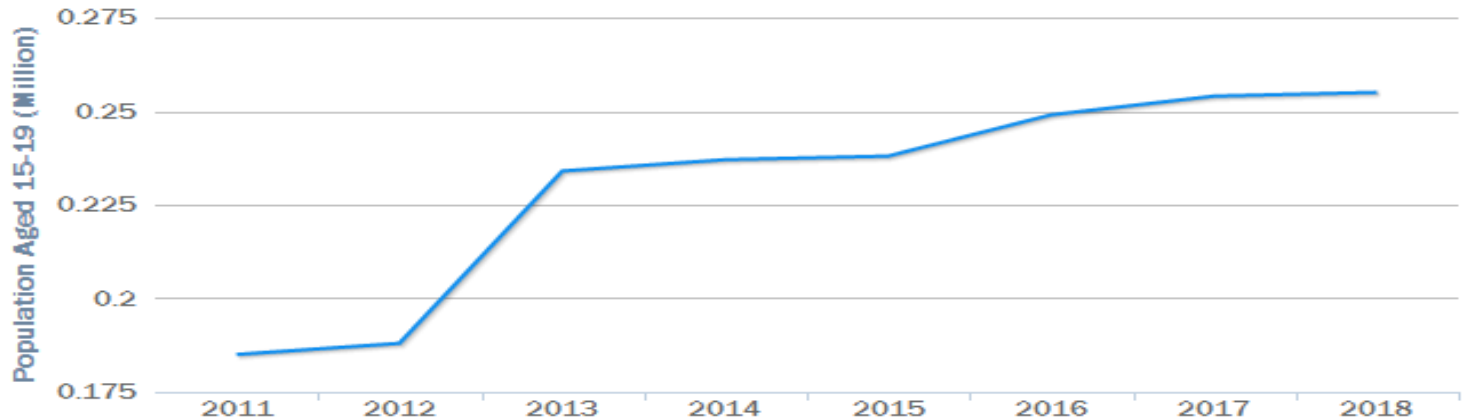


Population Split By Gender



Population Aged 15–19 Forecast, 2012–2017

7% of Kuwaiti population is below 34 years of age



Description:
Number of people in a country aged between 15 and 19 years, 2011-2018.

Kuwait Education System

Type and number of schools, students & teachers in the scholastic year 2013-14

Table 1

	General Education Schools	Private Education Schools	Special Needs Schools	Religious Education Schools	Adults & Illiteracy Education Schools	TOTAL
No. of Schools	794	504	29	11	94	1432
No. of Classes	14986	7740	241	130	745	23842
No. of Students	357273	227306	1694	2876	27900	617049
No. of Teachers	57042	14122	1297	699	Commissioned	73160

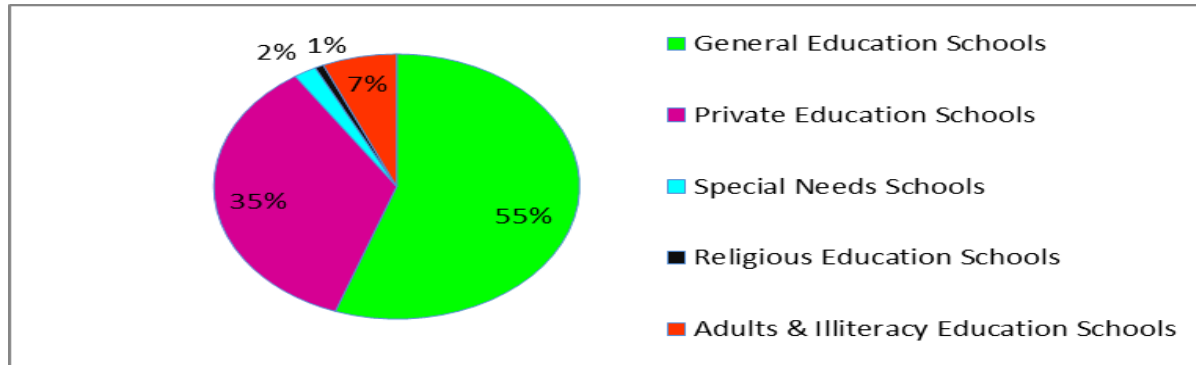


Figure 1

The pie chart is proof that numbers have increased significantly, not just of students but also of schools and staff.

Local ELT Market - Kuwait

Average number of English classes

	Starting Grade	Number of hours per week	ELT tests taken
Primary	First Grade	Four	Cumulative and end of year assessments starting from fourth grade.
Secondary	Sixth Grade	Six	Cumulative and end of semester exams and end of year exams
Tertiary	First Year	Average three hours	End of term and presentation and multi-type assessments (essays, projects)

Learner Stats

Number of English learners in relation to the population¹⁴

Total learners (above)	Primary schools – English	Intermediate	Secondary schools – English	Tertiary/ Vocational colleges	Total learners – English	% of English learners from total learners
463.423	48.712 (not including special needs)	23.503	9.874	8.805	90.894	20%

Local ELT provision

English compulsory subject in the public system starting from first grade.

Currently, there are 3,460 ESL teachers at a primary level, 2,650 at the intermediate level and 1,653 at secondary level (totals for both private and public).

main representatives of this market are the British Council, Amideast,

New Horizons, and The British Institute for Training and Education, and AUK.

Current **British Council Teaching Centre** student body is 4,023 students:

–Adults: 2,576

–Young Learners: 1,447

UK ELT Market - Kuwait

Majority of students undertaking ELT in the UK are self –funded students

Government sponsorship is provided for ELT, UG & PG programmes in the UK

Summer programmes very famous among Kuwaitis as well as students starting HE in the UK

Main representatives of this market are the British Council, Amideast, New

Horizons, and The British Institute for Training and Education, and AUK

There is no accredited institutions list for ELT; though, centres should be accredited by British Council

Kuwait Cultural office places majority of scholarship students

Demand for specialist/executive English Language courses

UK ELT Market - Kuwait

Rank	Source market	Student weeks	% of total weeks	Student numbers	% of total students	Average length of stay (weeks)
16	Venezuela	37,875	1.89%	2,652	0.53%	14.3
17	Taiwan	28,435	1.42%	4,786	0.96%	5.9
18	Kuwait	25,049	1.25%	2,256	0.45%	11.1
19	Mexico	23,869	1.19%	6,292	1.26%	3.8
20	Oman	21,520	1.08%	2,125	0.43%	10.1

6th highest

Source: **STUDENT STATISTICS REPORT 2014**

ELT opportunities

Considerable increase in the number of sponsored students
Good number of agents to work with
Teachers training - Interest in Kuwait for establishing links with UK
MoE looking at reform in areas of: teacher training, career development for teachers, school leadership, evaluation, school systems and establishment of

Quality Assessment Centre
Demand for specialist English Language courses from PAAET, executive training, etc
CBE, NCCAL opportunities...

Challenges - Competition locally, internationally and within the UK ELT sector

Marketing your institution

Country visits

Raising profile, branding – participating in exhibitions, roadshows, etc..

Attractive offers

Working with agents – visits

Relationships building with scholarships agencies, other educations institutions is important


Promotional material in Arabic & sensitive to culture

Shout about your strengths & achievements

Word of mouth is very effective

Kuwait Cultural Office in London

Principal sponsors for Kuwaiti nationals

- Ministry of Higher Education (MoHE) Research (KISR) 
143 UK university on approved list
- Public Authority for Applied Education & Training (PAAET)- 300
- State owned companies (mostly oil & Gas) also sponsor employees
- Banks and Investment companies
- Kuwait University (KU)- 80
 - PG only – departments
- Civil Service Commission (Employees from all Ministries)
- Kuwait Institute for Scientific

Education Agents

Agents database update – currently 11 agencies out of which three are licensed.

Trained eleven education agents and are certified

British Council certified agents appear on the GAL list



Agents in Kuwait

www.bcagent.info/gal

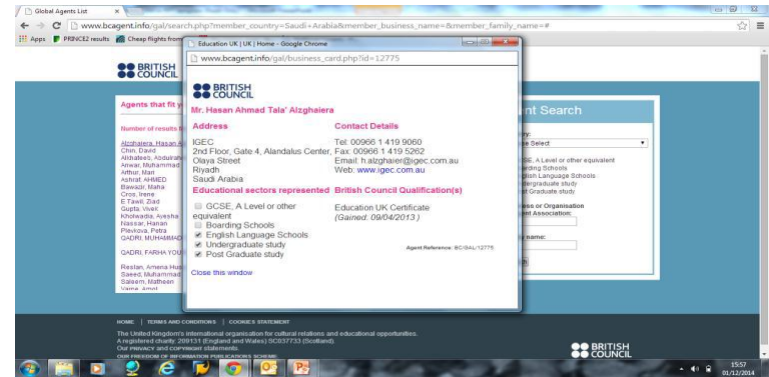
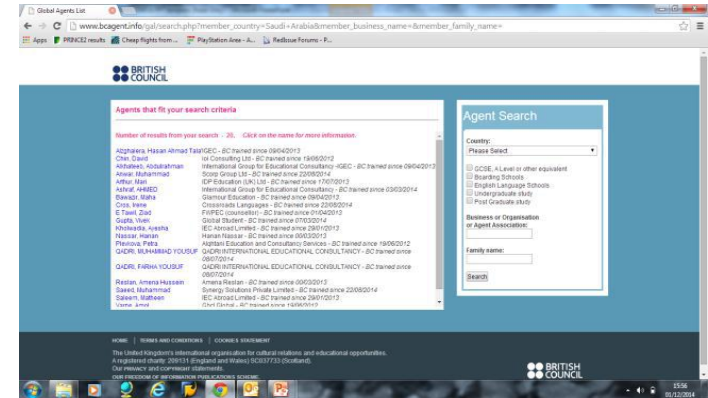
11 agents have passed our agents training scheme and are now British Council certified agents along with four middle of completing it soon.

Contact details can be found at this link:

http://www.bcagent.info/gal/search.php?member_country=Kuwait&member_business_name=&member_family_name=

Agents database update – currently 12 agencies out of which three are licensed.

British Council certified agents appear on the GAL list.



SIEM in Kuwait offers..



Kuwait Online

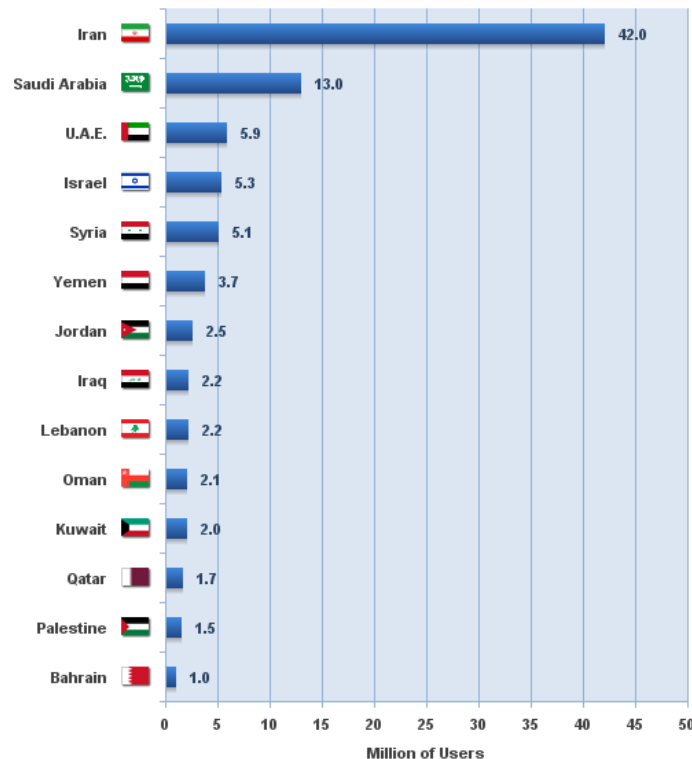
Over 2 million Internet users in Kuwait in (June 30,2012) (65% growth).

Internet penetration at 86%

Facebook, YouTube and Twitter are most popular sites in the Kuwait with Kuwaitis and expatriates

SMS campaigns are widespread although their influence seems to be waning while e-shot campaigns are also widespread and more popular due to recipients' ability to click through to relevant websites

Middle East Internet Users
June 30, 2012



Upcoming Events

EDUKEX

2016

16-17 March 2016



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UK ELT growth in Qatar
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SIEM Manager Qatar

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Agenda

General country profile

ELT in the Qatari Education System

UK ELT Market in Qatar

The need for English in Qatar (i.e. ELT opportunities in Qatar)

Country profile - Qatar



In 2003



In 2012



Country profile - Qatar

Government

- The head of state is the Emir/Sheikh Tamim bin Hamad Al-Thani
- The father Emir is Hamad Bin Khalifa Al-Thani – ruled until 2012
- HH Sheikha Moza Al-Misnaed; prominent female leader



Demographics

Total Population : 2,400,000 – less than 15% Qataris (Qatar Statistics Authority, 31st October 2015)

Economy

Qatar has the second highest per capita GDP in the world – \$97,500 (2014, World Bank) coming mostly from its energy exports



ELT in the Qatari Education System

Schools:

- English subject is taught from KG – Grade 12
- Teaching medium is Arabic at government schools
- Est 40% of private schools teach in English

Post-secondary education

- 90% of HE and TVET institutions teach in English
- IELTS is a requirement in most of these institutions
- Some offer English courses (foundation years) prior to degree programmes

Local provision

- 35+ private English centres
- 8500+ students studied English in 2014
- Almost equal demand from Qataris for YL and Adults courses delivered in Qatar

UK ELT Market in Qatar

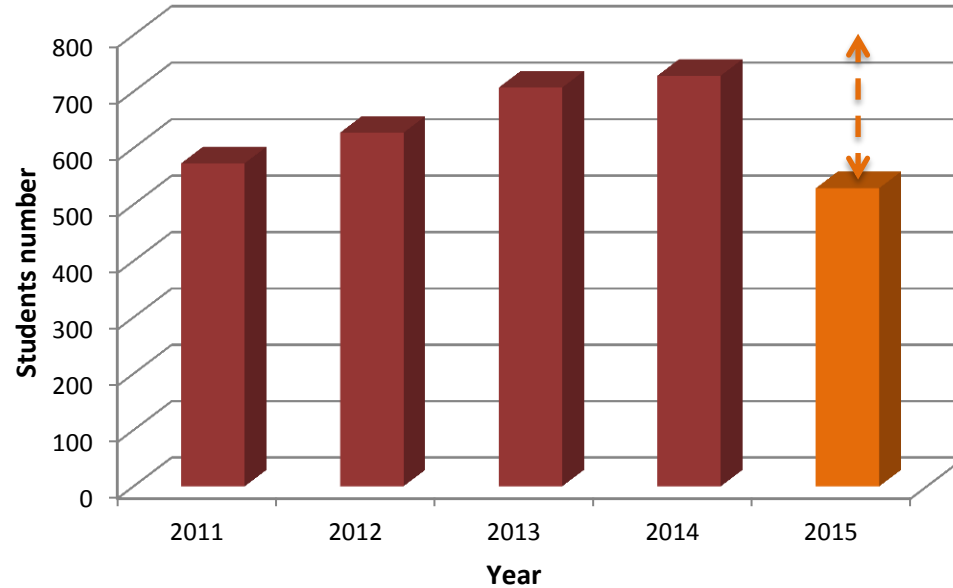
- The majority of students studying ELT in the UK are self –funded students
- Some government and semi-government sector sponsor students for ELT courses in the UK
- The Supreme Education Council (SEC) started offering specific scholarships for ELT in the UK in 2014 – under pilot stage
- The majority of scholarship providers do not have eligibility criteria for ELT support overseas – assessed on case-by-case basis and subject to management decision
- The majority of scholarship providers offer only funding services to their employees; potential trainees are expected to search for the ELT courses themselves
- There is no scholarship list for ELT; though, centres should be accredited by the British Council

UK ELT Market in Qatar

Country/Region	No. of Student Weeks*	Percentage of total student weeks (%)	Ranking	Student numbers
Qatar (student weeks)	11484	0.57	28	966

Source: 2014 annual return statistics (399 private sector English UK members)

UK ELT Market in Qatar

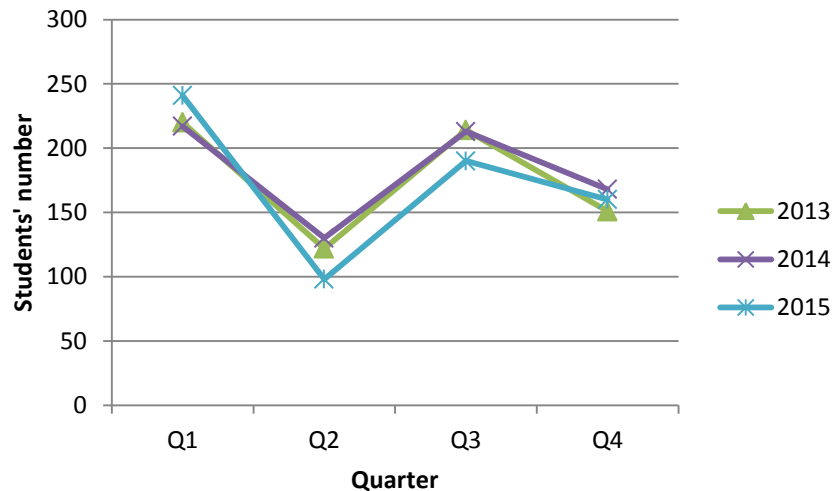


Source: UKVI quarterly generated visa and immigration reports

*missing Q4 data for 2015

UK ELT Market in Qatar:

- Adult driven market
- Popular English courses: General English and English for Academic Purposes
- Popular periods of study: Autumn – Spring



Agents' status in Qatar

- No licensed agents in Qatar since the government of Qatar discourages the work of agents
- Due to lack of agents' presence in Qatar, students tend to use agents from outside Qatar
- For all valid agents trained by British Council offices, refer to the GAL (Global Agent List):
www.bcagent.info/gal

Student Recruitment - Opportunities and Challenges

Opportunities

- English Language levels are a major barrier for Qatari students
- Many students do not have English Language level to access new education opportunities both locally and in the UK
- Qatar has one of the lowest average IELTS score in the world
- Lack of English Language intensive programmes in Qatar
- Current generous state scholarship programmes

Challenges

- Lack of agents limit institutions' direct access to the market
- High competition locally and within the UK ELT sector

Recommendations

- Time spent on the ground is very valuable in Qatar
- Relationship building with scholarship providers, employers, schools and students and their parents is key
- Word of mouth recommendation is very effective
- If you are targeting adults, focus on recruitment for winter/spring courses, but keep an eye on SEC ELT admission deadlines
- If you are targeting juniors, focus on recruitment for summer courses

How can we help you?



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Saudi Arabia

Overview

- COUNTRY OVERVIEW
- ECONOMIC OVERVIEW
- DEMAND FOR ENGLISH LANGUAGE
- MAIN SOURCE OF STUDENTS
- MARKET OPPORTUNITIES
- ACCESS TO THE MARKET
- CONTACT US

Country overview

Population:
30,770,375
(2014
est.) (**20,702,536**
Saudi nationals)

**Population growth
rate:** % **2.1** (2014
est.)

Birth Rate: 19.01
births/1,000
population (2013
est.)

Age Structure: 0-
14 years:38%, 15-
64 years: 59.5%

**Gross enrolment
rate** in primary
education in 2009
reached **96.6 %**

**Unemployment
rate:** **11.7 % (2014
est.)**

(source: Saudi Central Dept for
Statistics and Info
<http://www.cdsi.gov.sa/>)

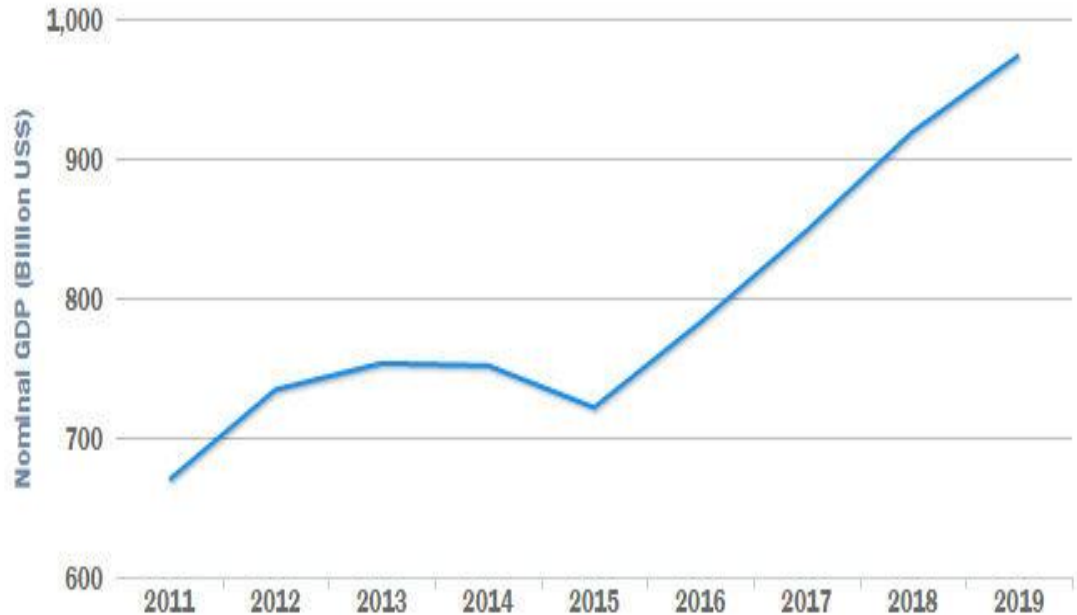


Economic overview

In 2014, economic growth fell to 3.7 per cent – the slowest pace since 2009 - amid low oil prices, regional instability.

The government has announced record budgetary spending of US\$229.3 billion (36.3% of GDP) for 2015, which will be fuelled in part by dipping into massive foreign currency reserves.

Nominal GDP forecast



Source: Economist Intelligence Unit (EIU)

Demand for English language

Table 2: Number of student weeks, students and average length of stay by source market (2014)

Rank	Source market	Student weeks	% of total weeks	Student numbers	% of total students	Average length of stay (weeks)
1	Italy	303,981	15.20%	128,881	25.88%	2.4
2	Spain	152,135	7.61%	46,981	9.43%	3.2
3	Saudi Arabia	124,215	6.21%	11,402	2.29%	10.9
4	France	107,823	5.39%	41,796	8.39%	2.6
5	Korea	92,996	4.65%	6,482	1.30%	14.3
6	Russia	92,003	4.60%	31,142	6.25%	3.0
7	Libya	90,869	4.54%	6,163	1.24%	14.7
8	Turkey	90,691	4.53%	13,117	2.63%	6.9

Source: English UK Annual Marketing Stats report 2014

Main source of students

- The Custodian of the Two Holy Mosques Scholarship Programme
- The Custodian of the Two Holy Mosques Scholarship Programme for Technical Trainers
- Saudi Universities
- Ministry of Interior
- Ministry of Defence
- ARAMCO
- SABIC
- Smaller Scholarship Schemes (Saudi hospitals, Saudi banks, Ministries...)

Market opportunities

- Student recruitment (fulltime long-term students)
- Summer short courses
- Opportunities in local delivery

Access to the market

- Invest in profile raising activities in Saudi
- Build strong links with local education agents in Saudi.
- Participant in in-country activities

The screenshot shows a web browser window displaying the British Council's 'Global Agents List' search results. The URL in the address bar is www.bcagentinfo/gal/search.php?member_country=Saudi+Arabia&member_business_name=&member_family_name=. The page features the British Council logo at the top left. The main content area is titled 'Agents that fit your search criteria' and shows a list of 20 search results. Each result includes the agent's name and the date they were trained since. For example, the first result is 'Albghaiera, Hasan Ahmad Taia IGEC - BC trained since 09/04/2013'. To the right of the search results is an 'Agent Search' sidebar with a 'Country' dropdown menu set to 'Please Select' and several checkboxes for search filters: 'GCSE, A Level or other equivalent', 'Boarding Schools', 'English Language Schools', 'Undergraduate study', and 'Post Graduate study'. Below these filters are input fields for 'Business or Organisation or Agent Association:' and 'Family name:', along with a 'Search' button. At the bottom of the page, there are navigation links for 'HOME', 'TERMS AND CONDITIONS', and 'COOKIES STATEMENT', followed by a footer containing the British Council's mission statement and contact information. The taskbar at the bottom of the browser window shows various application icons and the system clock indicating the time as 15:56 on 01/12/2014.

Contact us

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