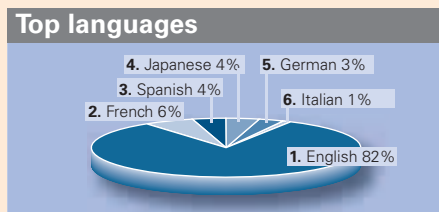
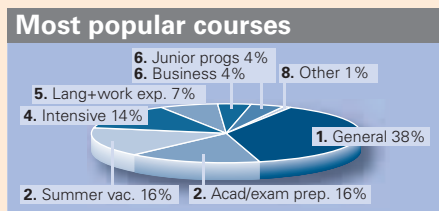
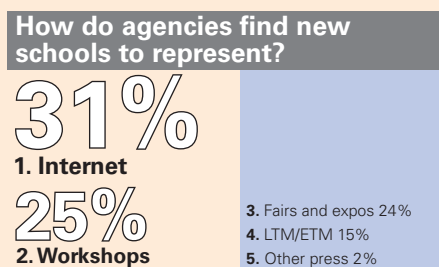
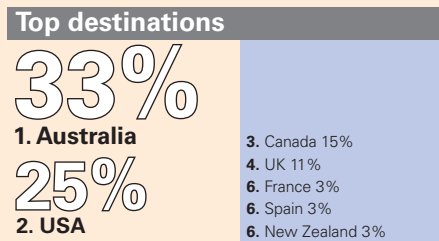


Taiwan business up

The need for English language skills in the workplace has been fuelling demand for language travel in Taiwan, according to the agencies that took part in this year's Agency Survey. Meanwhile, Australia has become the number-one destination for Taiwanese students.



- ### Key points
- The total number of students placed by the 10 agencies in our survey was **2,698**
 - Individual agencies placed between **50 and 800 students** on language courses per year
 - Average business growth was **nine per cent**
 - Five agencies** charged their clients a handling fee of between NT\$2,000 (US\$60) and NT\$10,000 (US\$300)
 - The **majority** of agents said that business would improve over the coming year
 - Host family accommodation was the most popular choice for **78 per cent** of Taiwanese students
 - The average length of stay for Taiwanese students was **13 weeks**



Market growth

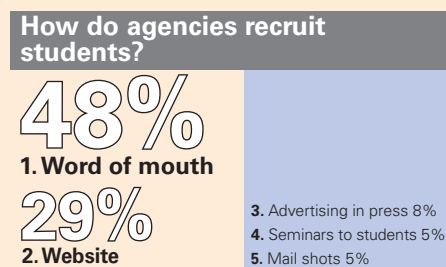
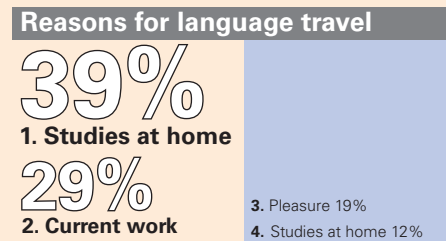
Business was good this year for Taiwanese agencies, with all but one reporting that student numbers had either stayed the same or improved on the previous year. One agency posted a decrease in business of 20 per cent, which was put down to the unfavourable economic situation in Taiwan, while those that had experienced an increase in business posted growth of between five and 30 per cent. Although average growth was positive, reaching nine per cent overall, this marks a slowdown compared with the results of our previous survey, when agency business grew by 23 per cent (see *Language Travel Magazine*, November 2004, pages 14-15).

Language and destination trends

Top destinations for Taiwanese students changed considerably this year with Australia coming out on top, accounting for 33 per cent of the market compared with just seven per cent last year, while last year's top destination of the UK was chosen by just 11 per cent of students, compared with 39 per cent last year. The USA also gained in popularity this year, being the destination of choice for 25 per cent of students, compared with 15 per cent in 2004. English continued to be the most popular language for Taiwanese language travellers to learn and one agency pointed out that business for them had increased mainly due to the continued importance of English in the workplace.

Student and course trends

Agency clients were less likely to be learning



- ### Economic overview
- The relatively strong consumption growth rate in Taiwan during the first half of 2005 is expected to maintain its growth momentum into the second half of 2005. The forecast for consumption growth for 2005 is a robust 2.95% on a year-on-year basis.
 - The NT dollar is expected to stay at its current level for the near future and the overall average forecast for 2005 is NT\$31.64 to US\$1.
 - The central bank has stated that the currency is relatively stable, but its slight weakening in value mid-year should boost exports, which make up almost half the nation's economy.
- Source: Taiwan Inst. of Ec. Research/Taipei Times

a language in order to go on to further studies overseas, according to agencies this year, with this being the motivating factor for 39 per cent of students, rather than the 62 per cent recorded last year. Instead, current work was a more important reason, followed by studies at home, which increased from three per cent last year to 12 per cent this year. Last year, intensive and academic preparation courses made up 47 per cent of business, while this year, general language courses were the most popular, followed by academic and exam preparation programmes and summer vacation programmes.

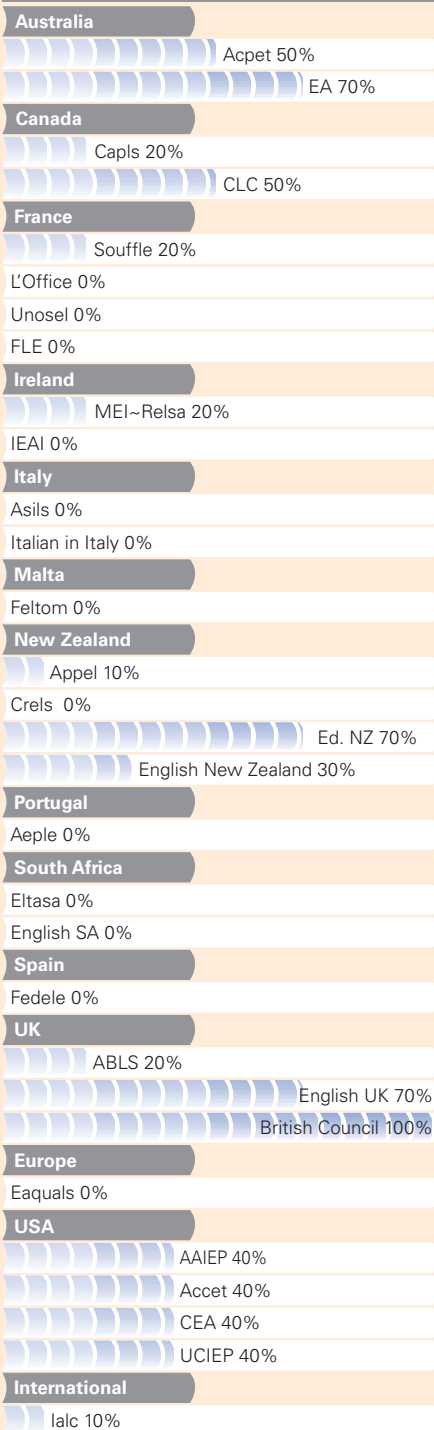
Agency business

Word-of-mouth recommendation replaced the Internet as the primary method for agencies to attract students and was responsible for attracting 48 per cent of clients. The Internet was the second most important way for agents to market their services, although it was the most important method of finding new schools to represent. No agency placed more than 800 language students annually. The number of schools represented by individual agencies varied from three to 300 and averaged 152, while the number of countries represented varied from four to 12, averaging out at eight.

Looking ahead

All of the agents who gave an answer said that business was expected to grow over the next 12 months. Reasons given included a recovery of the economy in Taiwan, an increase in interest for long-term and professional programmes, an expansion of the number and types of programmes offered by the agency and, in one case, a proposed new office in Australia.

Percentage of agents who recognised each of the following organisations



Taiwanese agents named a range of language programmes they work with, including, in Australia: South Australia Language Centre, Adelaide, SA; TAFE South Australia, Adelaide, SA; University of South Australia English Language Centre, Adelaide, SA. **In Canada:** Pacific Gateway International College, various; Pacific Language Institute, Vancouver, BC; YMCA Vancouver, Vancouver, BC. **In France:** Institut de Touraine, Tours; Institut Parisien, Paris. **In the UK:** International Quest, Southampton; International House, London; ISIS Language Centres, London; Malvern House, London; Twin Training International, London. **In the USA:** Aspect, Santa Barbara, CA; Boston University, Boston, MA; Intrax, San Francisco, CA; University of San Diego, San Diego, CA. **Worldwide:** Eurocentres, Geos, Study Group.

Thank you to the following agencies for taking part in this survey: Academic Asia Taiwan; Dragon Worldwide Education Service, Education Foundation of Europe, Envision Study Group, Federal Institute of Federal Advancement, Geos International Exchange Association; Hui Huang Overseas Development, Southern Hemisphere Overseas Study Centre, Welcome Consulting Company.