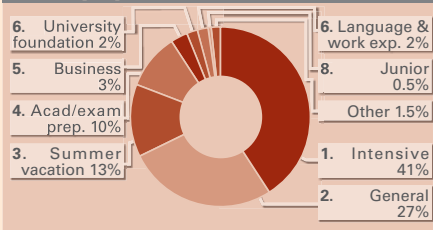


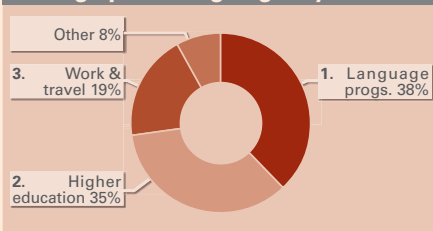
Taiwan stands firm

The language travel market in Taiwan remains stable and English-speaking destinations continue to be popular with students. However, last year's predictions have come good as we reveal a new market leader. Meanwhile, work & travel placements have grown in popularity.

Most popular courses



Average percentage agency business

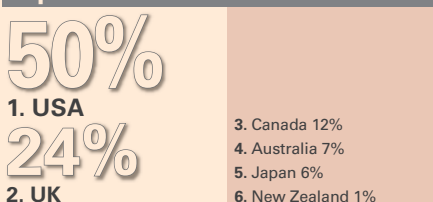


Economic overview

- Taiwan's export growth accelerated quickly at the beginning of the year with overseas shipments in March increasing by 22.8 per cent over the same month in the previous year. This boom was largely fuelled by the sale of electronics to China, Southeast Asia and India.
- Taiwan's economy grew by 6.39 per cent (annualised) in the fourth quarter of last year, buoyed by the biggest increase in exports in nearly two years.
- Predictions forecast that real GDP growth will average around four per cent a year in 2008-12. Growth will be driven by domestic demand as unemployment continues on its downward trend and investment – particularly in export-oriented sectors and services – increases.

Sources: *The Economist*, *Bloomberg*

Top destinations



How do agencies find new schools to represent?



Market growth

Only seven agencies participated in this month's agency survey on Taiwan, three less than in our previous survey (see LTM May 2007, pages 14-15). Despite such a low response rate, however, the number of students placed increased by 24 per cent this year – with 2,933 students sent abroad for study purposes compared with 2,370 previously. All but one of our respondents said that business had either increased or stayed the same, with average business growth swelling by seven percentage points to 16 per cent. Interestingly, the agency that reported a business decrease predicted that business would stabilise within the next 12 months.

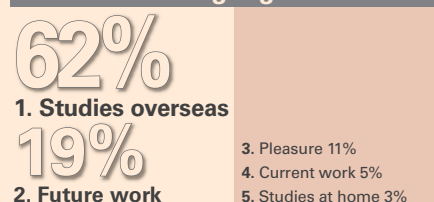
Language and destination trends

The year 2007 saw the UK lose its edge over nearest rival the USA – dropping eight percentage points to 24 per cent – while the USA was requested by 50 per cent of students – an increase of 18 percentage points. Canada also recovered ground lost in 2006, achieving 12 per cent compared with eight per cent previously. And Japan – the only non-English speaking country in the survey – continues to make its presence felt, up from five per cent to six per cent. In terms of language studied, English remains the most popular choice, with an 85 per cent request rate, up from 77 per cent previously. This was followed by Japanese, which was favoured by 10 per cent of agency clientele.

Student and course trends

General language courses were chosen by 27 per cent of Taiwan's outgoing student market in 2007, down slightly on the 33 per cent recorded previously. However, intensive

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the seven agencies in our survey was **2,933**
- Individual agencies placed between **50 and 1,200 students** on courses per year
- Average business growth was **16.1 per cent** in the last 12 months
- The average length of stay for Taiwanese students was **eight weeks**
- Overall, **56 per cent** of Taiwanese students stayed in host family accommodation when studying overseas
- The USA** was the most popular destination for Taiwanese students, followed by the UK and Canada
- On average, agencies worked with **24 schools** in the last 12 months

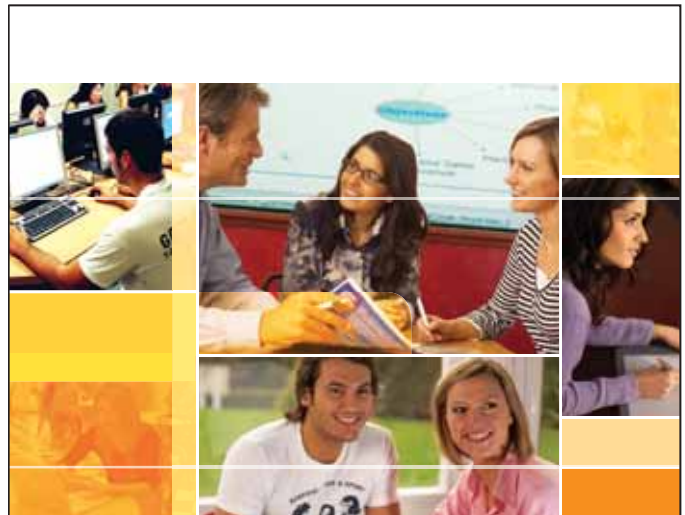
programmes surged ahead, accounting for 41 per cent of all course requests. This trend reveals that students are opting for a more accelerated way of learning – a notion that is also reflected in the shorter average length of stay (eight weeks, compared with 14 weeks in 2006). Further studies overseas were the main reason for language travel, motivating 62 per cent of clients on average, according to respondents. Accordingly, higher education placements now account for 35 per cent of overall agency business and with Work & travel enrolments now representing 19 per cent of business (up from four per cent), language travel no longer seems to be the major sector in the study abroad industry in Taiwan.

Agency business

A company's website proved to be a popular way to attract new business in 2007, with 46 per cent of agency clientele originating from this source, up from 26 per cent. Meanwhile, personal recommendations from previous students and/or family members accounted for 44 per cent of all new business, compared with 31 per cent previously. And mailshots – not documented in 2006's poll – proved a means of recruitment in 2007, achieving 6.5 per cent of new enrolments, on average.

Looking ahead

Taiwanese agents accurately predicted a change in destination trend last year (namely that the USA would pull ahead of the UK) and change looks to be on the agenda again. One agent noted that they intend to promote summer study and travel tours to high school as well as university-aged students, while another sees summer camps becoming a major strength in 2008.



Hand picked from the best English language schools

Canada

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

Ireland

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

Malta

- Clubclass Residential Language School
- Global Village English Centre

New Zealand

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

South Africa

- Interlink School of Languages, Cape Town

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English

- Churchill House, Ramsgate
- Devon School of English
- Eastbourne School of English
- Eckersley Oxford

- English Language Centre, Brighton and Hove
- Excel English, London
- Frances King School of English, London

- ILS English, Nottingham
- Lake School of English, Oxford
- Lewis School of English, Southampton

- London School of English, London
- Millfield English Language Holiday Courses
- Wimbledon School of English, London

United States of America

- Boston School of Modern Languages

Bosnia

- Soros School, Sarajevo

Poland

- York School, Krakow

Turkey

- British Side

QE events for Agents 2008

- QE invites agents in the Ukraine to meet the QE schools on **7th October in Kiev**
- QE invites agents in Poland to meet the QE schools on **9th October in Warsaw**

For further information: agents@quality-english.com

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

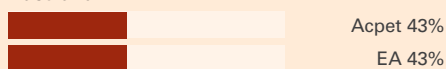
www.quality-english.com



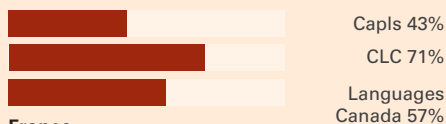
Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations

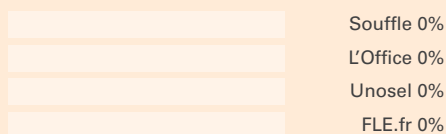
Australia



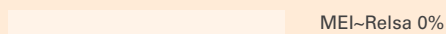
Canada



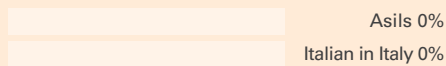
France



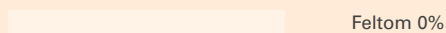
Ireland



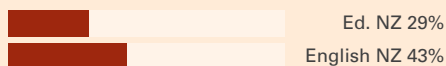
Italy



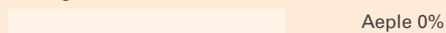
Malta



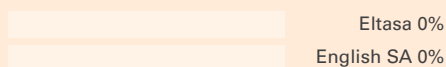
New Zealand



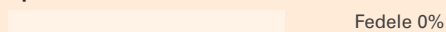
Portugal



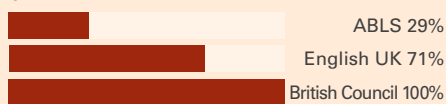
South Africa



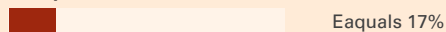
Spain



UK



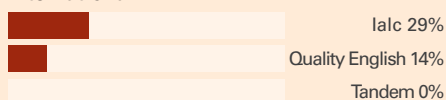
Europe



USA



International



Taiwanese agents named a range of language programmes they work with, including, in Canada: Vancouver Community College, Vancouver, BC. **In the USA:** University of California, San Diego, CA; University of California, Los Angeles, CA; University of Washington Extension, Seattle, WA. **Worldwide:** ELS; Embassy CES; Eurocentres; Geos; Kaplan Aspect; Language Studies International; Zoni Language Centers.

Thank you to the following agencies for taking part in this survey: UR Edu & Info Co Ltd, Ching Shan Counseling Co, Global Education Services, Study Link Taiwan, Envision Study Group, Cambridge Language Center, Best Education Studies.