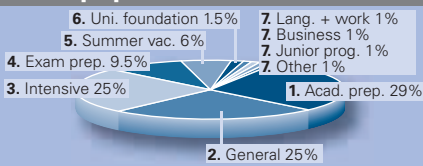


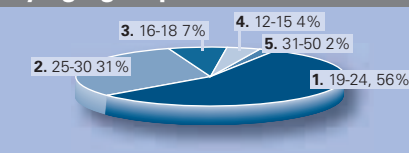
# Thai market steady

Agents taking part in this year's Agency survey on Thailand reported a slow year in 2004, although predictions for the future remain hopeful due to continued interest from students in study abroad programmes.

## Most popular courses



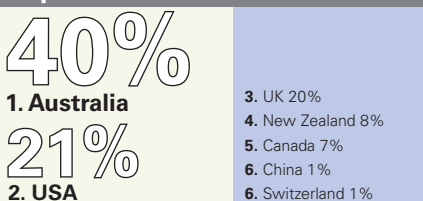
## Percentage of agency business by age group



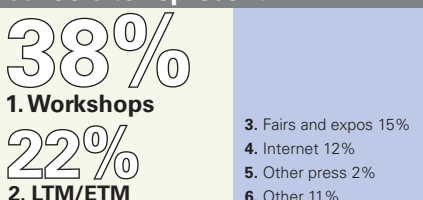
## Key points

- The total number of students placed by the 10 agencies in our survey was **1,634**
- Individual agencies placed between **50 and 380** students on language courses per year
- The realistic average business growth was **one per cent** in 2004.
- The average student spend on tuition and accommodation per week was **US\$268**
- Thirty per cent of agencies charged their clients a handling fee of between **US\$50 and US\$130**
- Agency business peaked during **March and July**.
- The average length of stay for Thai students was **15 weeks**
- On average, our agent respondents represented **107 schools** in five countries

## Top destinations



## How do agencies find new schools to represent?



## Market growth

Although overall business increased by 54 per cent during 2004 for our Thai agent respondents, one agency posted a single increase of 500 per cent as a result of business expansion, which distorts the picture of the real state of the Thai market during this time. Disregarding the result of this one agency, overall business growth was a much more muted one per cent, with over half of our respondents reporting a stagnation or decline in student numbers. Reasons given by agents for these less than impressive figures included economic factors as well as increased competition from other agencies in Thailand.

## Language and destination trends

English was the overwhelming language of choice for Thai students, with six agencies reporting that 100 per cent of their clients asked for English courses. The remaining agencies reported a predominance of interest in English with occasional requests for French, Italian, Chinese or Japanese. Australia was the top destination, which is a change from our previous Agency Survey on Thailand when the UK was the destination of choice for the largest number of students (see *Language Travel Magazine*, March 2004, pages 12-13). This year, the UK was the third most requested destination behind Australia and the USA.

## Student and course trends

The reasons given by students for studying a language overseas remained similar to

## Reasons for language travel



## How do agencies recruit students?



## Economic overview

- The Private Consumption Index (PCI) in Thailand declined by 0.5 per cent in January, although it showed some improvement on the decline of 1.2 per cent in the previous month.
- The Consumer Price Index (CPI) rose by 2.7 per cent at the beginning of this year compared with the same period last year. Non-food prices rose by 1.8 per cent while food prices rose by 4.3 per cent year on year.
- In January the Thai baht appreciated to 38.5 baht per US dollar, owing mainly to investment by foreign funds in the Thai stock market as well as confidence in the Thai economy following the general election.

Source: Bank of Thailand

our previous Thai Agency Survey, with future studies overseas being the principle motivation. Academic preparation courses were also the favourite courses chosen by Thai students, followed by general and intensive programmes and exam preparation. With Thai students showing such an academic focus to their language studies, it is not surprising that the majority – 87 per cent – of students were aged between 19 and 30 and this age group was largely identified by agents as showing the most promise for the future. An increase in interest in Masters degree programmes overseas was also fuelling an increase in the number of students in their late 20s studying abroad.

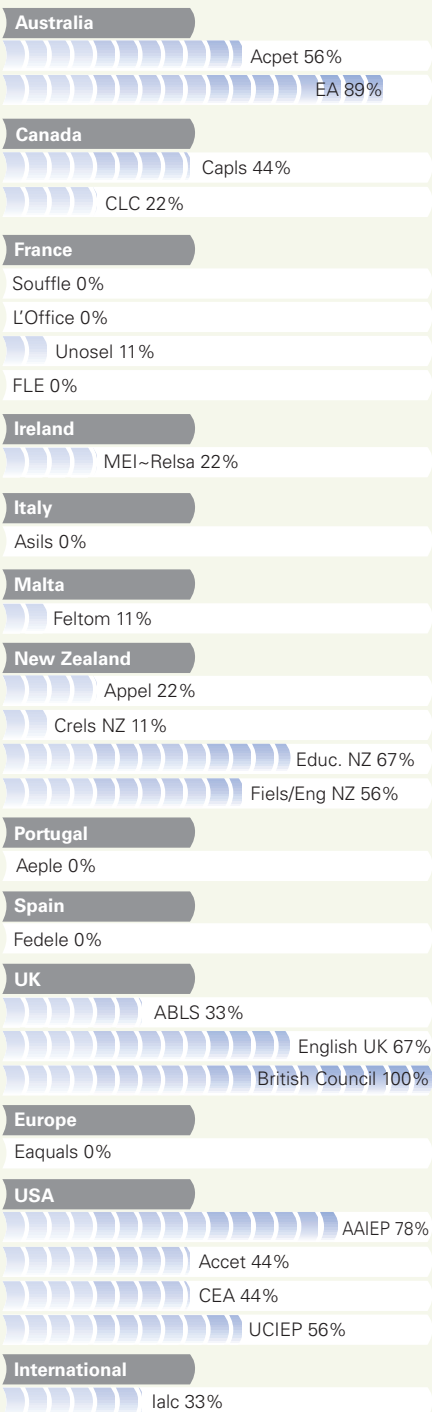
## Agency business

Agency clients had a firm idea of the country they wanted to study in before seeking an agent's advice, with 82 per cent having already chosen their destination. However, 40 per cent of these students went on to change their minds after consulting an agent. Accredited schools were also important to Thai students, with agents reporting that an average 71 per cent of clients actively sought schools accredited by an association.

## Looking ahead

Forecasts for the future were mixed although a significant proportion of our respondents expected business to pick up in the future, after two years of slow growth, as the economy in Thailand improved. Agencies also predicted that Thai students would continue to be interested in mainstream studies abroad, with the university sector showing the greatest potential for growth.

**Percentage of agents who recognised each of the following organisations**



**Thai agents named a range of language programmes they work with, including, in Australia:** Hawthorne Language School, Melbourne, VIC; Holmes College, various; Insearch UTS, Sydney, NSW; Phoenix English Academy, Perth, WA; University of Canberra, Canberra, ACT; University of Tasmania ELC, Launceston, TAS; University of Queensland, Institute of Continuing & Tesol Education, Brisbane, QLD; University of Western Australia, Perth, WA; **In Canada:** LSI, Vancouver, BC; PLJ, Vancouver, BC; **In New Zealand:** CCEL, Christchurch; Hotel Institute Montreux, Montreux; **In the UK:** Brunel University, London; Hilderstone College, Hilderstone; London School of English, London; LSI, Portsmouth; Mayfair School of English, London; Regent, London; **In the USA:** ELS Language School, various; Kaplan, various; San Diego State University ALL, San Diego, CA; University of California Riverside, Riverside, CA; **Worldwide:** ESLI, LSI.

**Thank you to the following agencies for taking part in our survey:** Australia Centre, EdNet Co., OEC Global Education, Professional InterEducation Co, SELT Education Link, STA Travel, StudyOverseas Centre Co., Studywiz, UniAdvice.