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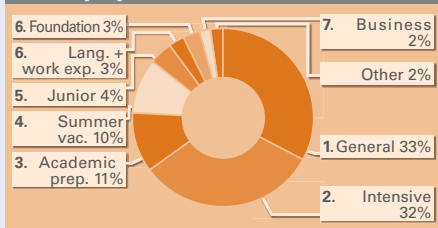
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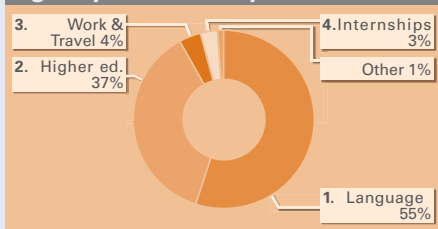
Taiwan stable

Taiwan's language travel market continues to grow steadily. Language study abroad, as well as a focus for academically motivated students, now seems to be a pleasurable pastime for many agency clients. Meanwhile, both the UK and the USA lead in the destination stakes.

Most popular courses



Agency business by sector

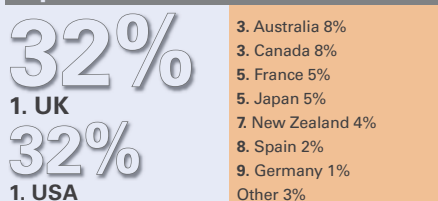


Economic overview

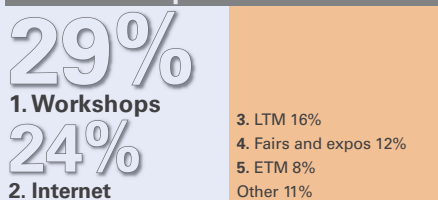
- Taiwan's economy showed signs of growth earlier this year with the index of leading indicators for January standing at 108.4 points, up 0.6 per cent from December. The index is used as a gauge for the economy's direction.
- The NT dollar strengthened against the US dollar towards the end of 2006, rising from NT\$0.072 to NT\$33.055 on the foreign exchange market.
- The Taiwanese government forecasts economic expansion of 4.3 per cent this year, up from its previous estimate of 4.1 per cent. Export growth has slowed but domestic consumption and private investment is up. Last year's economic growth was 4.6 per cent.

Sources: Taipei Times/Commerzbank

Top destinations



How do agencies find new schools to represent?



Market growth

Although only half of the agencies questioned gave an indication of business growth year on year, 60 per cent of those agencies reported that student numbers had either remained the same or improved in the last 12 months. Growth of between five and 30 per cent was reported, with an average growth overall of nine per cent, the same as in our previous survey of business in Taiwan (see *Language Travel Magazine*, December 2005, pages 14-15). None of the agencies responding reported a decrease in business growth.

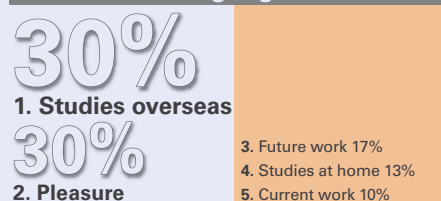
Language and destination trends

A considerable change in destination was recorded this year, with Australia losing its lead, accounting for the choice of just eight per cent of clients, down from 33 per cent. Canada also saw a seven per cent decline in market share. The UK and the USA now share top spot, each receiving 32 per cent of students compared with just 11 per cent and 25 per cent respectively last year. English remains the most popular language studied by 77 per cent of Taiwanese students, down slightly from 82 per cent, and nine per cent of students chose to study Japanese, making it the second most popular language to learn.

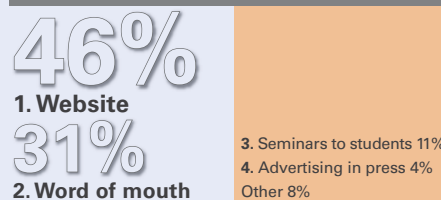
Student and course trends

The motivation behind 30 per cent of agency clients looking to learn a language abroad appears to be further studies overseas, compared with just 12 per cent last year. Meanwhile, 'studies at home' declined in popularity as a reason for study abroad. However, language learning is proving to be a pleasurable pastime for some 30 per cent of agency clients, a significant increase on the

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the 10 agencies in our survey was **2,370**
- Individual agencies placed between **50 and 600 students** on courses per year
- Average business growth was **nine per cent** in the last 12 months
- The average length of stay for Taiwanese students was **14 weeks**
- Higher education placement overseas** made up 37 per cent of overall agency business
- The UK and the USA** share the top spot for most popular language study destination with a 64 per cent joint-share of the market
- Five out of the 10** agencies canvassed charge their clients a handling fee

19 per cent of clients in this bracket last year. Again, the most popular course proved to be general language programmes, but it was intensive courses that experienced a boom in popularity with 32 per cent of students opting for a more concentrated method of learning (up from 14 per cent last year). Both academic preparation and summer vacation courses saw a marginal decrease and university foundation courses, not polled in 2005, received a three per cent influx of students.

Agency business

Taiwanese agencies appear to be generating more business through their websites with over 45 per cent of all business now stemming from an agency's website, up from 29 per cent. However, recruiting students via word-of-mouth is still proving a tried and tested means of recruitment and polls in at 31 per cent, but is down 17 per cent on last year. Workshops have taken over from the Internet as the most effective way to find new schools, and fairs and expos saw a decrease in usage, down from 24 to 12 per cent. The most important sector of agency business was language learning, accounting for 55 per cent of overall business, however higher education polled second with 37 per cent, underlining that further education abroad is a significant business avenue for Taiwanese agencies.

Looking ahead

Taiwanese agents remain optimistic about the future of the language learning sector and nominal growth looks set to continue. Most agents also predict that the USA will pull ahead of the UK as preferred destination of choice.

