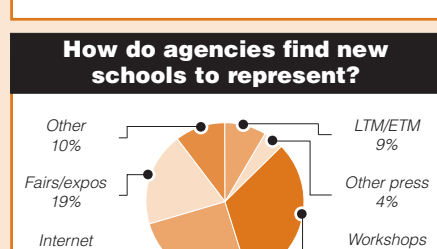
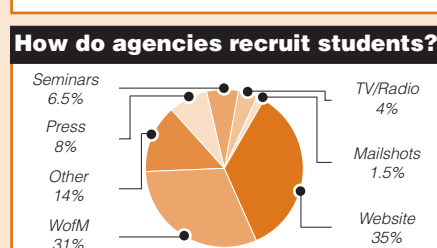
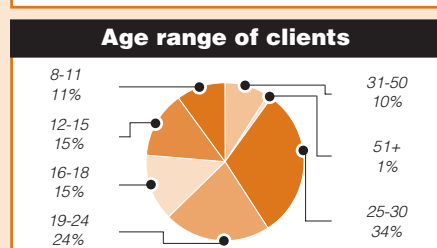
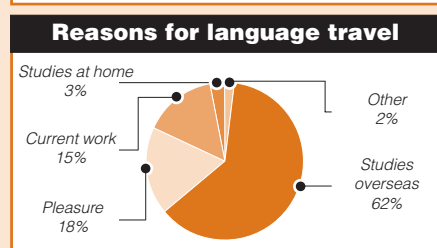
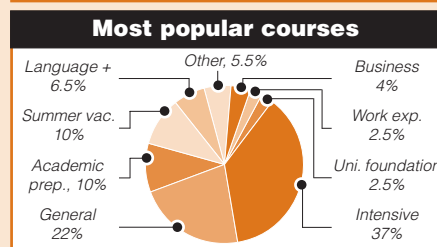
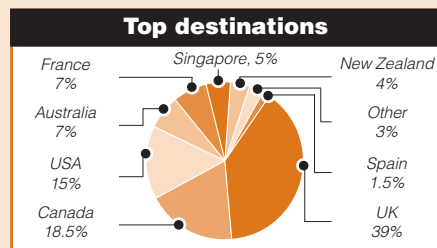


Taiwan looking up

After negative growth in 2002, the Taiwanese outbound student market picked up in 2003, despite the impact of Sars on student bookings.



- ### Key points
- The total number of students placed by the eight agencies in our survey was 1,514
 - Individual agencies placed between 8 and 500 students on language courses per year
 - Average growth for seven of the agencies in our survey was 21 per cent in 2003
 - The average spend on tuition and accommodation per week remained steady at US\$343
 - All of the agencies answering the question indicated that they charged a handling fee
 - French was the second-most requested language by Taiwanese students
 - The average length of stay, at 14.3 weeks, was identical to last year's result
 - Forty-six per cent of clients asked for an accredited language school

Market growth

According to the eight agencies that took part in our Agency Survey this year, there was good growth at most businesses last year, with just one agency reporting that bookings remained at 2002 levels, while all others reported an increase in numbers. Four agencies singled out the 25-to-30 year old age range as the age group showing the most positive growth. Some agencies noted that despite the negative effects of Sars, they still experienced an overall increase in student weeks in 2003.

Student trends

One agency highlighted the 25-to-30 year old age group as a key language travel client group because some take a language course abroad as a holiday after a few years of working. The Taiwanese market has a high proportion of clients learning a language for pleasure only – 18 per cent this year and 21 per cent last year. In contrast, in Korea, for example, only five per cent of clients were reported to learning a language for pleasure only (see *Language Travel Magazine*, September 2004, page 12-13). Bookings for July, August and September made up half of

the annual business and 80 per cent of clients requested host family accommodation.

Course and destination trends

The UK remained the number-one destination choice for the second consecutive year, accounting for 39 per cent of student bookings. Although one agency dealt solely with the UK, across all the other respondents' business, it still came out as the first choice overall. In second place this year was Canada, up from fourth position last year and preceding the USA, which remains the third favourite destination choice. Singapore was noted by one agency respondent as a destination of note, and five per cent of Taiwanese students are now thought to study here, based on our survey. Australia was the choice

of seven per cent of students, as was France.

Agency business

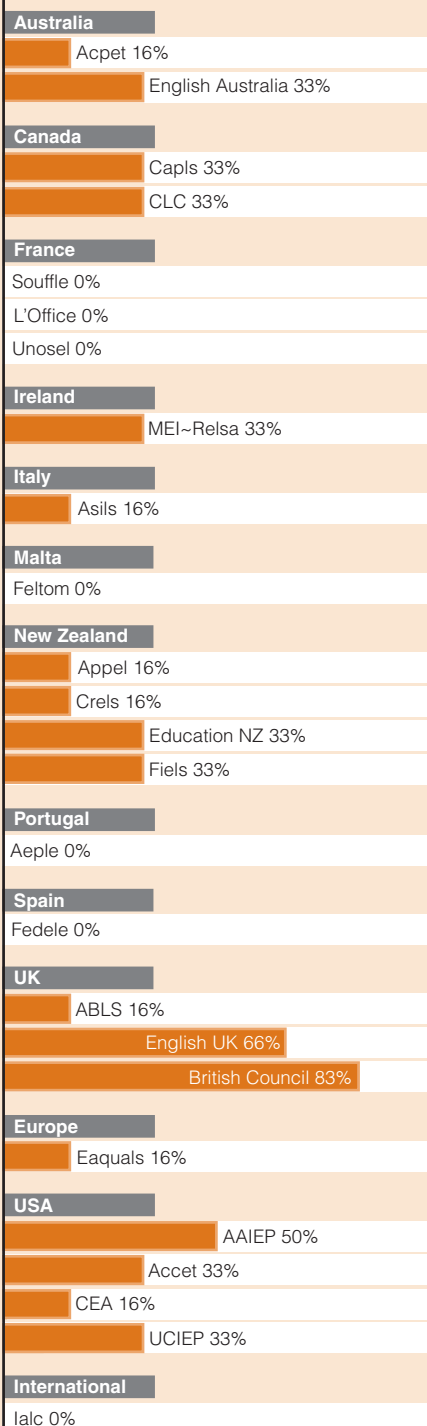
Taiwanese agencies now attract more clients via their website than by word-of-mouth recommendation, with 35 per cent of new clients coming from the Internet compared with 31 per cent from word of mouth. All of those agencies surveyed charged a handling fee to students, of whom 83 per cent were individual clients. According to agents, 69 per cent of students had a clear idea about which country to study in, while 38 per cent had pre-selected a city and 26 per cent a school. Agents estimated that around half of those students would go on to change their mind about the school and/or city on agency advice.

Looking ahead

Agencies seem optimistic about market performance to the year end and onwards. One agency cited the current economic recovery as boosting opportunity, while others mentioned a new website or increased promotion in the pipeline. Increasing interest in other European languages and in language plus courses was noted by a further respondent.

- ### Economic overview
- Exports out of Taiwan grew 25% year on year in the second quarter of 2004 and private investment also increased. The indications are that the economy is increasingly robust this year, and the prediction for annual GDP growth has increased to 5.87% from 5.41%.
 - Second-quarter GDP growth of 7.67% was the economy's best quarterly performance since the first quarter of 2000.
 - Private consumption in Taiwan is expected to grow by 2.7% this year, although spending will be linked to the impact of any rise or fall in crude oil prices on the local economy.
- Sources: Forex News; eTaiwanNews.com; Taipei Times

Percentage of agents who recognised each of the following organisations



Taiwanese agents named a range of language programmes they work with, including, in Australia: Australian College of English, Bondi Junction, NSW; **In Canada:** Columbia International College, Hamilton, ONT; Centennial Secondary School, Coquitlam, BC; Pacific Gateway International College, various; Riverside Secondary School, Coquitlam, BC; **In France:** Institut de l'ouraine, Tours; **In Germany:** Carl Duisberg Centre, Cologne; **In New Zealand:** Aspect ILA, Christchurch, various; Beet Language Centre, Bournemouth; Sussex Downs College, Eastbourne; LSI, various; International House, London; **In the USA:** ESU International, various; Interlink Language Centers, various; San Diego State University, San Diego, CA; Wesli, Madison, WI; **Worldwide:** Geos.

Thank you to the following agencies for taking part in our survey: Boanda Group – Taida International Education Services; Dragon Worldwide Education Service Inc; Hanyin Education Consultant Institute; International Education Foundation; Netzsche International Education Institute; OxBridge Consulting; UR Edu & Info Co. Ltd; Welcome Consulting Co.