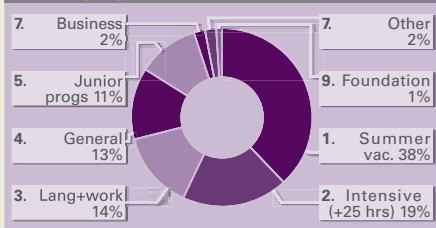


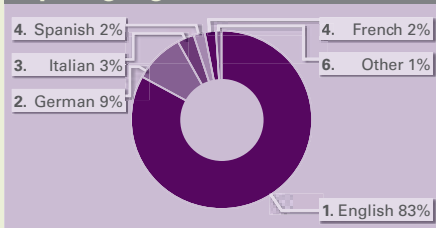
# Poland expectant

Many agencies in Poland experienced zero growth last year, but there is hope that business might flourish in 2006, with language and work programmes forecast to be one of the most significant growth sectors.

## Most popular courses



## Top languages

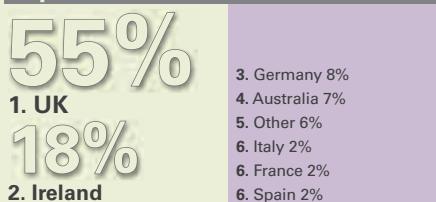


## Economic overview

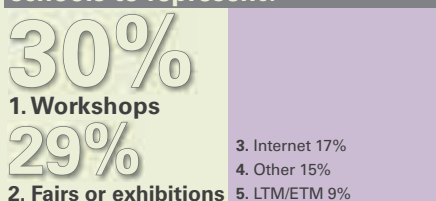
- Poland's unemployment rate stood at 17.8% in August, the highest rate in the European Union. The economic growth rate, forecast to be 3.5% for the 2005 year, is higher than in Western European countries but not high enough to have made an impact on the unemployment rate to date.
- Following the elections in October, analysts believe the new coalition government, led by "pro-market Marcinkiewicz", could see the country continue to gain economic strength, with one bank executive highlighting the competitive spirit in the country. Inflation is currently low at 1.9%.

Sources: Bloomberg, Business Week.

## Top destinations



## How do agencies find new schools to represent?



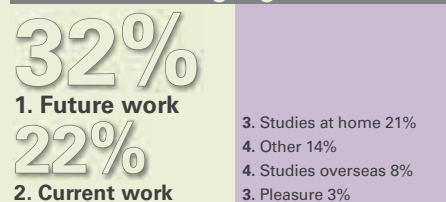
## Market growth

Since our last Agency Survey of Poland two years ago (see *Language Travel Magazine*, January 2004, page 12), there has been no real growth in the outbound market, with eight out of the 12 agencies that took part in this survey saying that they sold the same number of student weeks on year in 2005 compared with 2004. Looking at the individual performances of the other agencies, however, there were some widely differing experiences: one agency reported exceptional growth of 30 per cent, which was attributed to better economic circumstances in Poland, while another said that bookings had declined by 70 per cent, because entering the European Union had put the brake on bookings, presumably because Polish students can now access cheaper higher education fees and apply more easily directly. Overall, across all agency businesses, the growth rate stood at just 0.8 per cent.

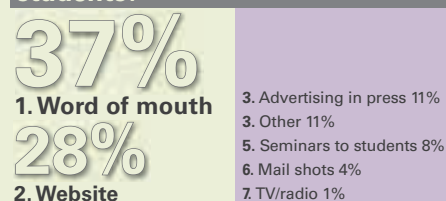
## Language and destination trends

Although there has been no real growth in the market, there have been changes in where students are studying. While English remains the most popular language to learn (83 per cent) and the UK remains the most popular destination (55 per cent, down from 59 per cent), Ireland and Australia are both far more important now to the Polish market, with Ireland accounting for 18 per cent of overall bookings in 2005. German has also replaced Spanish as the second most popular language to learn, with nine per cent of Poles studying German, back to pre-2004 trends. In fact, Italian received slightly more requests than Spanish in 2005.

## Reasons for language travel



## How do agencies recruit students?



## Key points

- The total number of students placed by the 12 agencies in our survey was **2,935**
- Average business growth was **0.8 per cent**
- The average length of stay for Polish students was **9.2 weeks**
- 68** per cent of clients requested host family accommodation
- One quarter** of the agencies surveyed charged students a handling fee
- Ireland** is growing in popularity as a study destination
- On average, our agent respondents represented **24 schools in nine countries**
- Agencies actively worked with **13 school partners** each last year

## Student and course trends

Summer vacation courses remained the most popular programme with Poles, followed by intensive courses of more than 25 hours a week and then work programmes, combining language tuition with either internships or paid placements. The average length of stay varied depending on the agency, with some pointing to an average stay of three weeks and others indicating that 39 weeks was the norm. Overall, students enrolled for an average of 9.2 weeks, an increase on 2004's figure of 3.5 weeks.

## Agency business

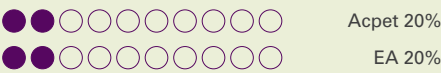
Agents estimated that they recruited more than one-third (37 per cent) of clients from word-of-mouth recommendation. The second-best way to recruit clients was reported to be via a website – which marks a change since our last survey, when just 18 per cent of clients were recruited from a website, instead of the 28 per cent indicated now. The range of schools represented by individual agencies depended on the size of the agency, but at 24, the overall figure was relatively low, compared with other outbound markets.

## Looking ahead

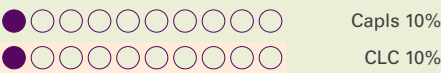
Agencies are generally optimistic about the coming year, although one agent indicated that more clients are booking directly online, which means agency growth will be limited. Other agencies seem confident that bookings will increase, by as much as 30 per cent in one forecast, because language and work programmes, executive tuition and even year-long foundation programmes are appealing to a greater number of students.

Percentage of agents who recognised each of the following organisations

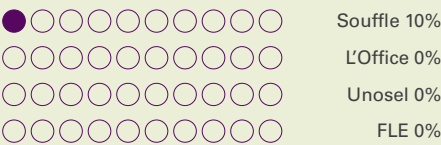
Australia



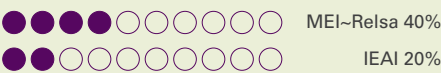
Canada



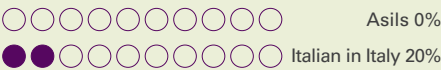
France



Ireland



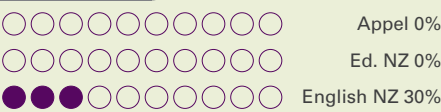
Italy



Malta



New Zealand



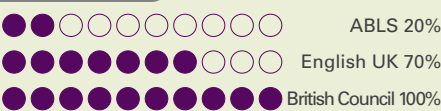
Portugal



Spain



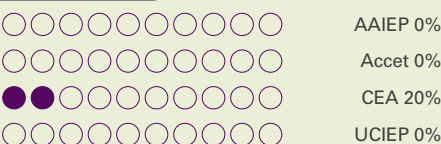
UK



Europe



USA



International



**Polish agents named a range of language programmes they work with, including, in Australia:** Cambridge College, Sydney, NSW; BWS Gernalingua, Munich; Horizonte, Regensburg. **In Italy:** MB Scambi Culturali, Padova; Scuola Leonardo da Vinci, Florence. **In Ireland:** Atlantic Language School, Galway; Alpha College, Dublin; Dublin City University, Dublin; English in Dublin, Dublin; Galway Cultural Institute, Galway; Horner School of English, Dublin. **In Malta:** EC European Centre, St Julians. **In Spain:** Entforex, various. **In the UK:** Country Cousins, Ilfracombe; Eastbourne School of English, Eastbourne; ELAC Study Vacations, Eastbourne; Excel English, London; Geos, London; John Hazell School of English, Hastings; King Street College, London; Regent Language Training, various; Scanbrit School of English, Bournemouth; St Giles, various. Worldwide: Aspect; LAL; Sprachcaffe; Study Group.

**Thank you to the following agencies for taking part in our survey:** AB Centrum; Almatramp Travel Agency; Almaturo Opole; Edu. Travel Migration Bureau; Guliwer Exchanges; International Study Consultants; JDU Bachalski; Kotla Travel; LEC Centre; Rajpm-Ikaria Tours; Tourism Office Jaworski; Travel Exchange & Education.