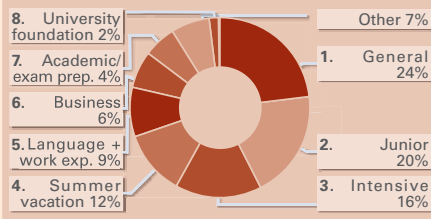


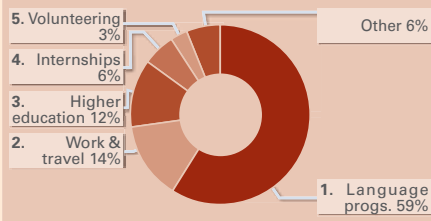
# Russia's ascent

Russia's outgoing student market continues to grow and develop as students explore different locations and undertake a wider range of courses.

## Most popular courses



## Average percentage agency business

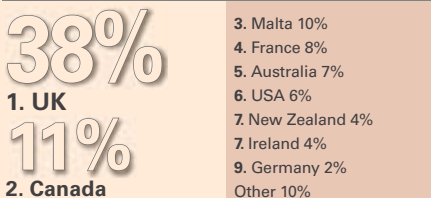


## Economic overview

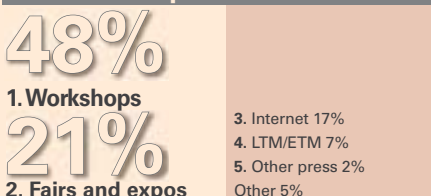
- Consumer price growth continued to slow down in the first half of 2007. In January-to-June, inflation stood at 5.7 per cent, compared with 6.2 per cent in the first half of 2006.
- The slowing of growth in food prices, excluding fruit and vegetables, made the biggest contribution to the reduction of inflation. These prices rose 2.7 per cent in the first half of 2007, compared with 4.5 per cent during the same period in 2006.
- The number of people employed in the economy increased by 1.9 per cent in the first half of 2007, compared with a 0.7 per cent increase the previous year. As a result, labour productivity increased by an estimated 5.6 per cent.

Source: The Central Bank of the Russian Federation

## Top destinations



## How do agencies find new schools to represent?



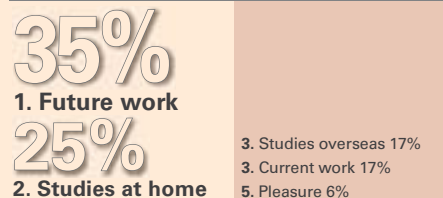
## Market growth

The Russian student market is an important one for many language travel destinations – particularly the UK and Malta – and, judging by the results of this year's survey, this trend looks likely to continue. The market across all our agent respondents grew by 31 per cent with all agencies experiencing growth in the last 12 months, apart from one who reported that business had stayed the same as the previous year. Individual business growth was recorded as being between 10 and 146 per cent. A few agencies reported that the average length of stay among their students was increasing, which had affected their statistics, while another agency pointed to an increase in marketing efforts as having a positive effect on their business.

## Language and destination trends

One noticeable change when comparing the results of this year's survey with our previous survey, conducted two years ago, is the fact that Russian students are becoming increasingly adventurous as to where they study. Previously, 62 per cent of agency clients chose to study in the UK, whereas this year the figure was down to 38 per cent (see LTM March 2006, pages 16-17). This year, other destinations such as Canada (up from two per cent to 11 per cent) and France (up from three per cent to eight per cent) gained ground among Russian students. This possibly reflects the maturing of the Russian outgoing market as well as the increasing ability of Russian students to get visas to study in different study destinations. French was the second most requested language after English by Russian students, chosen by 16 per cent (up from six per cent previously).

## Reasons for language travel



## How do agencies recruit students?



## Key points

- The total number of students placed by the 14 agencies in our survey was **2,410**
- Individual agencies placed between **nine and 1,200** students on courses per year
- Average business growth was **31 per cent** in the last 12 months
- The average length of stay for Russian students was **eight weeks**
- Overall, **53 per cent** of Russian students stayed with host families when studying overseas
- Nine agencies charged their students a handling fee of between **US\$72 and US\$435**
- On average, every agency worked with **30 schools** in the last 12 months

## Student and course trends

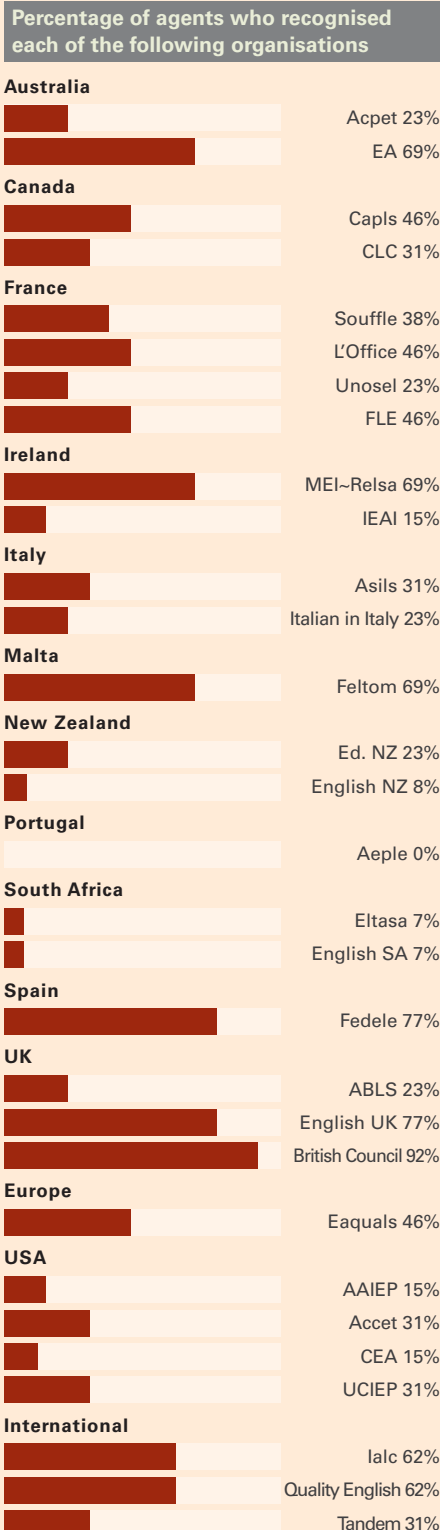
The percentage of agency clients choosing to study on junior programmes decreased compared with our 2005 results (down from 32 per cent to 20 per cent) and this may help to explain the trend towards longer study packages noted by some agencies. General language courses were favoured by a higher percentage of clients (up from 14 per cent to 24 per cent) and language and work placement programmes also increased (up from three per cent to nine per cent). The growth of language and work programmes among Russian clients is an exciting trend as it perhaps opens up overseas study and travel options for students who have not been able to afford such activities in the past.

## Agency business

Agents report that students are increasingly reliant on the advice of friends and relatives with word-of-mouth recommendations accounting for 47 per cent of total agency business this year, compared with 32 per cent in 2006. In contrast, advertising in the press only attracted nine per cent of business, compared with 18 per cent previously. In total, our agent respondents worked with an average of 96 schools in 16 countries last year, an increase on the 62 schools worked with in our previous survey.

## Looking ahead

The future looks bright according to the views of the agents who took part in this survey. The majority predicted that business would continue to grow with academic and special interest programmes on the rise. The growth in the economy appears to be supporting business growth as more students have the finances to study overseas.



**Russian agents named a range of programmes they work with, including, in Canada:** Ilac, various. **In Ireland:** CES Swandean, Dublin; Emerald Cultural Institute, Dublin; IH Dublin, Dublin. **In France:** Ecole France Langue, various; Silc, Montpellier. **In Germany:** Eurasia Institute, Berlin; GLS Sprachzentrum, Berlin. **In Malta:** Clubclass Residential Language School, Swireqi; EC, St Julians; European School of English, St Julians. **In the UK:** Bell, various; Colchester English Study Centre, Colchester; Excel English, London; Hampstead School of English, London; Inlingua, various; Into University Partnerships, various; Isca School, Exeter; Language Specialists International, Portsmouth; London School of English, London; Malvern House, London; OISE, Oxford; Severn Vale Academy, Shrewsbury; Sussex Summer School, Gillingham; Twin Group, various; Tasis, Surrey; Victoria School of English, London. **In Spain:** Malaca Instituto, Malaga; **Worldwide:** Eurocentres; Geos; Insearch; Kaplan Aspect; Regent; Study Group.

**Thank you to the following agencies for taking part in this survey:** Auditoria-tour, Association des Enseignants de Français, Interlogos, Language Studio, Litera Scripta Manet, Magister, Masterclass, Optima Study, Petro-Lingua, Students International, Study IN, Svetlana-S, Tourclub MI English, Uros.



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