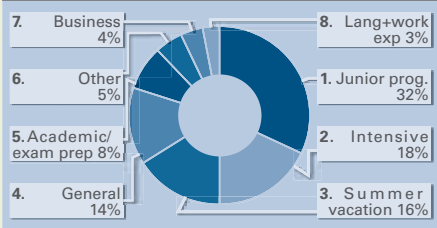


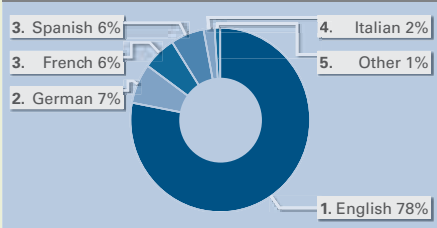
# Russia looks ahead

Although not experiencing the same growth as in our previous Agency Survey, Russian agencies painted a picture of health for the country's outbound language travel market. Further growth and expansion is also predicted for the next 12 months, according to our respondents.

## Most popular courses



## Top languages

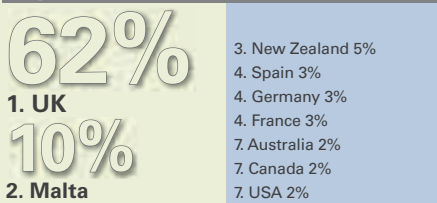


## Economic overview

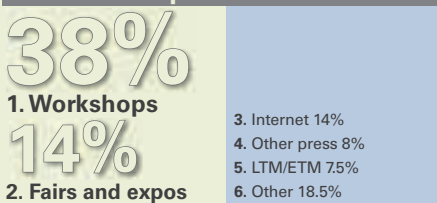
- Between January and September 2005, inflation stood at 8.6% compared with 8% in the first three quarters of 2004.
- At the end of August 2005, Russia's economically active population had increased by 0.9% compared with the previous year, while the number of people employed in the economy rose by 1.8% and the total number of jobless fell by 10.6%.
- From January to August last year, household real disposable income grew by 8.5% compared with the corresponding period in the previous year.

Source: Central Bank of the Russian Federation

## Top destinations



## How do agencies find new schools to represent?



## Market growth

2005 was a good year for business, according to the agencies that took part in this year's Agency Survey on Russia, with all but one of our respondents saying that business had increased or at least stayed the same in 2005. The average business increase across the board came in at 14 per cent, although individuals reported increases of between 10 and 50 per cent. Of those agencies that gave a reason for their increased fortunes, most pointed to their own increased marketing efforts or a new web presence as boosting their client base. The average business growth, however, was down on last year's mammoth growth of 63 per cent (see *Language Travel Magazine*, February 2005, pages 14-15).

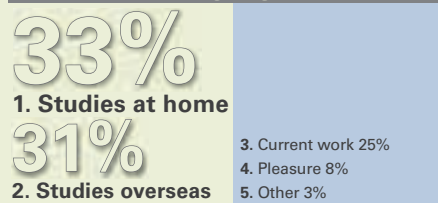
## Language and destination trends

The UK was once again the most popular destination for Russian students and its market share increased in 2005, up from 51 per cent to 65 per cent. Malta was also more popular, taking second place in the list of favourite destinations in 2005, up from fourth position in our previous survey. In contrast, the percentage of students choosing to study French in France decreased from 13 per cent previously to just three per cent. Six of the top nine favourite destinations for Russian students were English-speaking countries, with France, Germany and Spain all in fourth place, appealing to nine per cent of students between them.

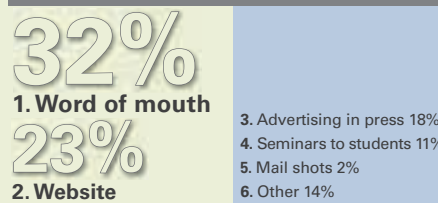
## Student and course trends

Course trends were very similar to the results of our previous survey on Russia, with junior programmes the most requested by clients

## Reasons for language travel



## How do agencies recruit students?



## Key points

- The total number of students placed by the 15 agencies in our survey was **4,103**
- Individual agencies placed between **12** and **1,300** students on language courses per year
- Average business growth was **14 per cent** in 2005
- The average length of stay for Russian students was **five weeks**
- Overall, **63 per cent** of Russian students stayed in host family accommodation when studying overseas
- Ten agencies charged their clients a handling fee of between **€50** (US\$60) and **€300** (US\$362)
- On average, our agent respondents represented **62** schools in **10** countries

(32 per cent, up from 27 per cent in 2005, charting 2004 trends). However, intensive and summer vacation programmes were more popular last year, at the expense of general programmes, which decreased from 25 per cent to 14 per cent in 2005. A majority of students chose host family accommodation (60 per cent) when studying overseas, with a further 29 per cent staying in residential accommodation provided by the school.

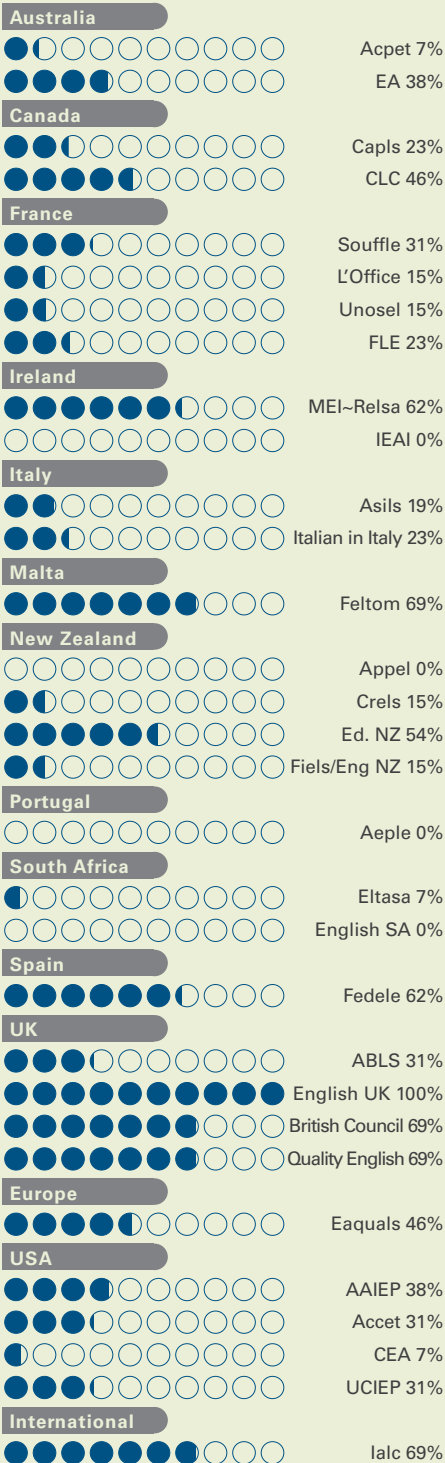
## Agency business

Agency marketing techniques were very varied this year and the percentage of students recruited by word-of-mouth recommendation was down from 49 per cent to 32 per cent. Many agencies also employed more pro-active methods of reaching new clients and the number of students enrolled by seminars increased from six per cent to 11 per cent, while the Internet also increased in importance, now accounting for 23 per cent of business, up from 20 per cent. Despite the fact that the agencies in this survey were larger and sent more students than those that took part last year, the average number of schools represented by agents was slightly lower than the previous average, at 62 schools per agency (down from 85).

## Looking ahead

All the agencies that gave an opinion forecast that business would continue to grow in 2006, with some noting growing national income from oil exports. Others predicted that there would be an increase in interest for courses in Japan and China as less popular languages became more important, as well as an increase in demand for more specialised courses such as career pathway programmes.

Percentage of agents who recognised each of the following organisations



**Russian agents named a range of language programmes they work with, including:** **In Australia:** Insearch UTS, Sydney, NSW; **In Canada:** Algonquin College, Ottawa, ON; ILAC, various; **In France:** Carel, Royan; Centre d'Echanges Internationaux, Paris; France Langue, Paris; **In Germany:** GLS, Berlin; **In Ireland:** Centre of English Studies, Dublin; **In Italy:** Scuola Leonardo da Vinci, Florence; **In Malta:** English Language Academy, Sliema; European Centre, St. Julians; Inlingua, Sliema. **In New Zealand:** Academic Colleges Group, Auckland; Languages International, Auckland; Language Schools New Zealand, Christchurch. **In Spain:** Don Quijote, Barcelona; Malaca Instituto, Malaga. **In the UK:** Anglo Continental, various; Bell International, various; Central School of English, London; Cicero Languages International, Tunbridge Wells; English Activity Centre, Edinburgh; Frances King School, London; Harrow House International College, various; Inlingua, Cheltenham; Greenwich School of English, London; International House, London; Regent, various; Select English, various; Southbourne School of English, Bournemouth; Stafford House School of English, Canterbury; Torbay Language Centre, Paignton; Twin Training, London; St Giles International, various; **In the USA:** Academic Exchange of America, Chehalis, WA; FLS International, various; Seattle Central Community College, Seattle, WA. **International:** Aspect, Carl Duisberg Centren, LSI, OISE, Study Group.

**Thank you to the following agencies for taking part in this survey:** Abitur Educational Group, BKC – International Education Centre, Carl Duisberg Centren Moscow, Educational Centre "Vera", EduWOW, Insight Lingua, Interbridge, International House, Langford Travel, Star Travel, Students International, Takt & Partners, Travel & Study Consulting, University Council, Uros,