ANALYSIS ON RUSSIAN AND CIS MARKET 2017-2021

SALES CONVERSIONS, TOP PERFORMERS & INSIGHTS



LONDONIST
STUDENT ACCOMMODATION AGENCY



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- Sales conversions Russia and CIS agencies 2020-2021
- Top 10 performing agencies 2020-2021 and insights
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- Sales conversions 2019-2020 analysis by country
- Comparison of top 10 performing agencies 2019-2020 VS 2020-2021 and insights
- Sales conversions 2018-2019 analysis
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- Comparison of top 10 performing agencies 2018-2019 VS 2019-2020 and insights
- Sales conversions 2017-2018 analysis by country
- Comparison of top 10 performing agencies 2017-2018 VS 2018-2019 and insights

SALES CONVERSION COMPARISON

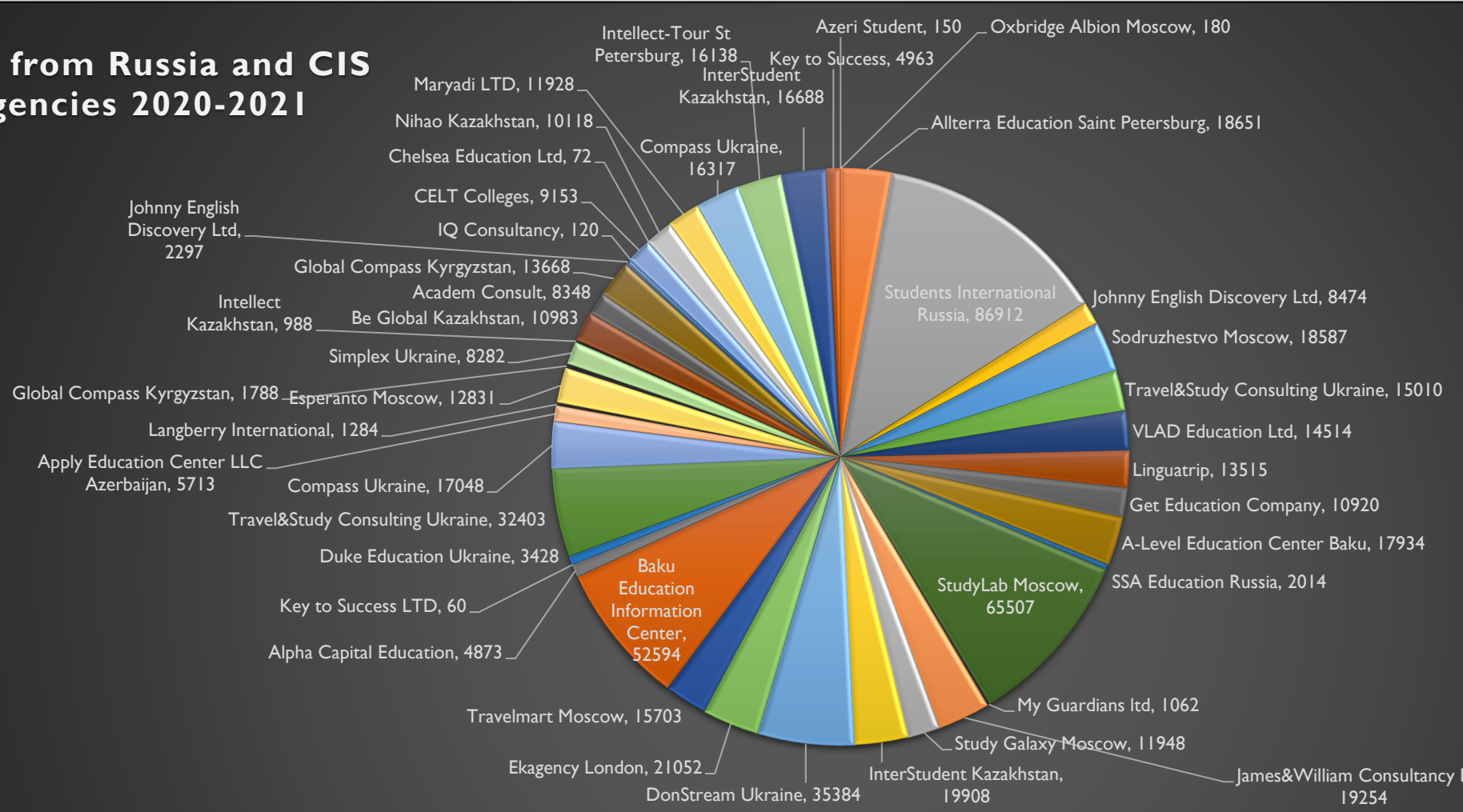
Sales conversions from Russian and CIS agencies

2020-2021	2020-2019	2019-2018	2018-2017
£721,314.22	£637,359	£465,085	£221,570

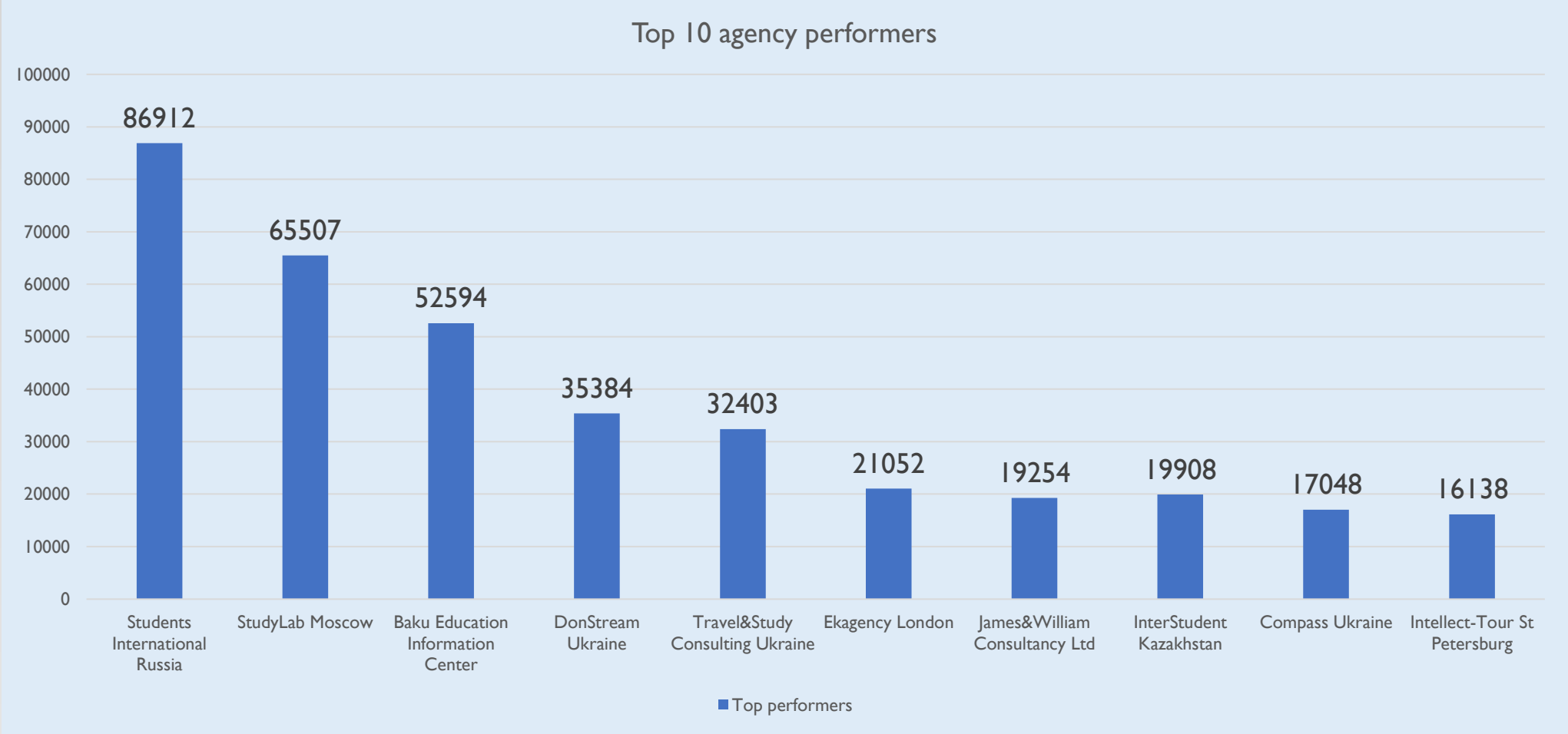
SALES CONVERSION 2020-2021

£721,314.22

Sales from Russia and CIS agencies 2020-2021

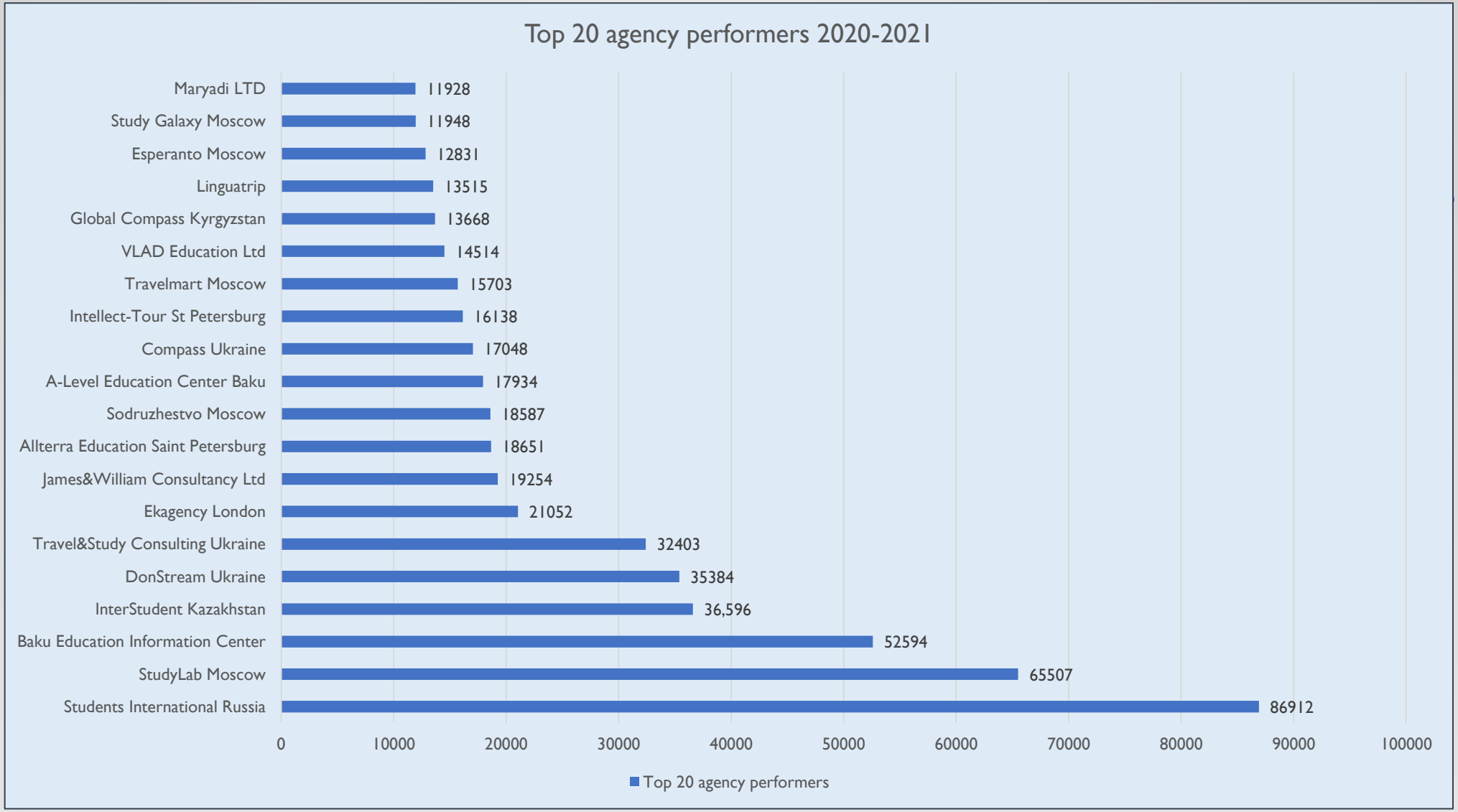


TOP 10 PERFORMING AGENCIES 2020-2021

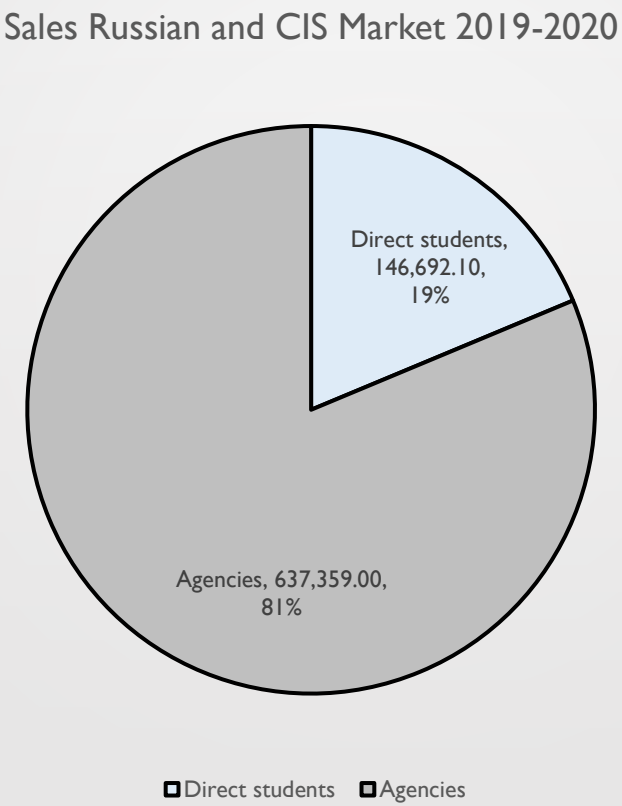


TOP 10 PERFORMING AGENCIES RUSSIA AND CIS

- Absolute leader is **Students International Russia** with £86,912 gross total value of bookings. It took time to get them onboard since 2017 however now Londonist is the only and exclusive accommodation provider to SI.
- Moscow branch of **StudyLab** is our long-term partner always paying in lump sums.
- Azerbaijan agency **Baku Education Information centre** is in top 3 performers – they deal with high profile clientele.


Top 20 agency performers 2020-2021
Maryadi LTD
Study Galaxy Moscow
Esperanto Moscow
Linguatrip
Global Compass Kyrgyzstan
VLAD Education Ltd
Travelmart Moscow
Intellect-Tour St Petersburg
Compass Ukraine
A-Level Education Center Baku
Sodruzhestvo Moscow
Allterra Education Saint Petersburg
James&William Consultancy Ltd
Ekagency London
Travel&Study Consulting Ukraine
DonStream Ukraine
InterStudent Kazakhstan
Baku Education Information Center
StudyLab Moscow
Students International Russia
11928
11948
12831
13515
13668
14514
15703
16138
17048
17934
18587
18651
19254
21052
32403
35384
36,596
52594
65507
86912
0
10000
20000
30000
40000
50000
60000
70000
80000
90000
100000
Top 20 agency performers

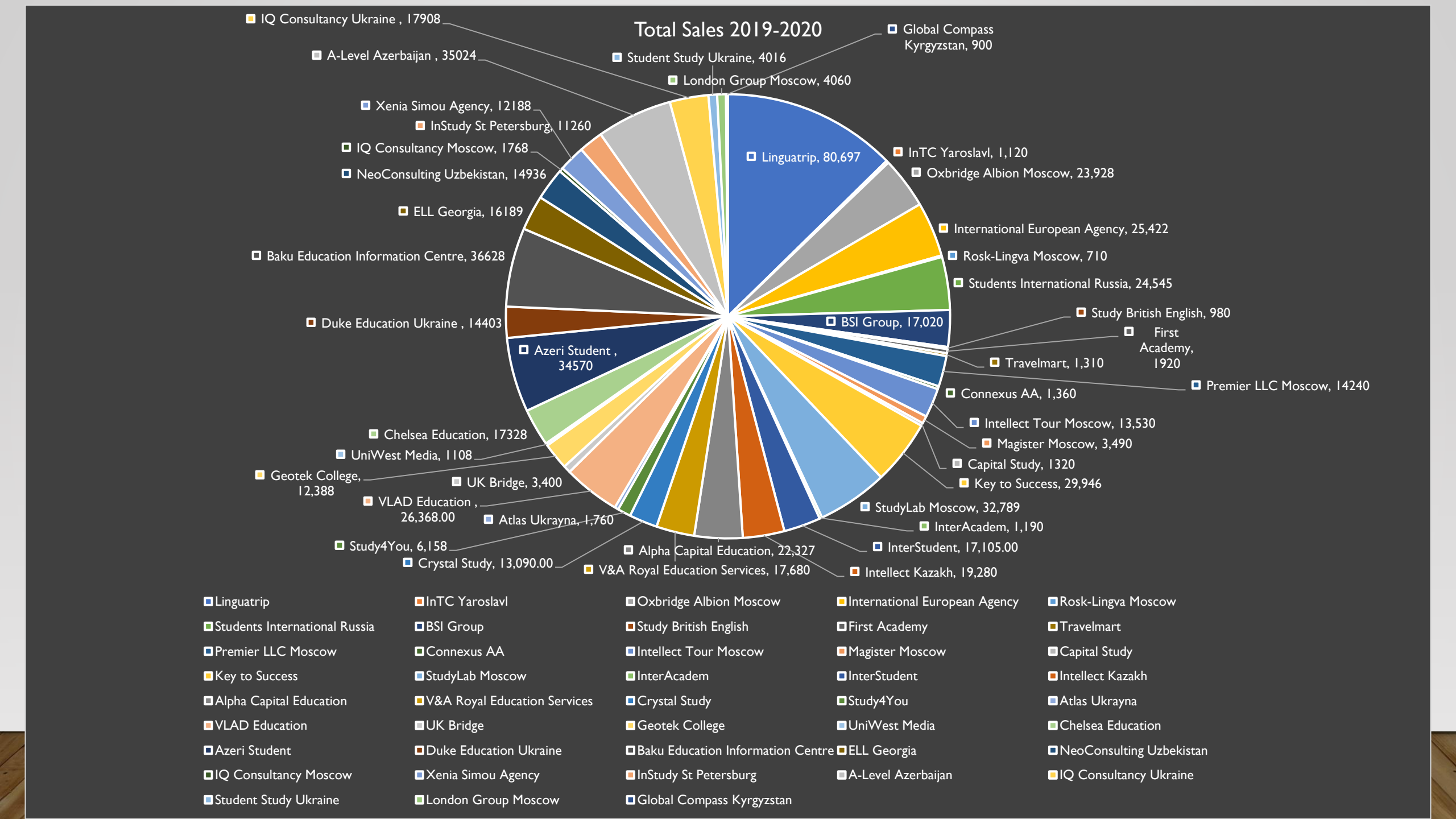
SALES CONVERSION 2019-2020



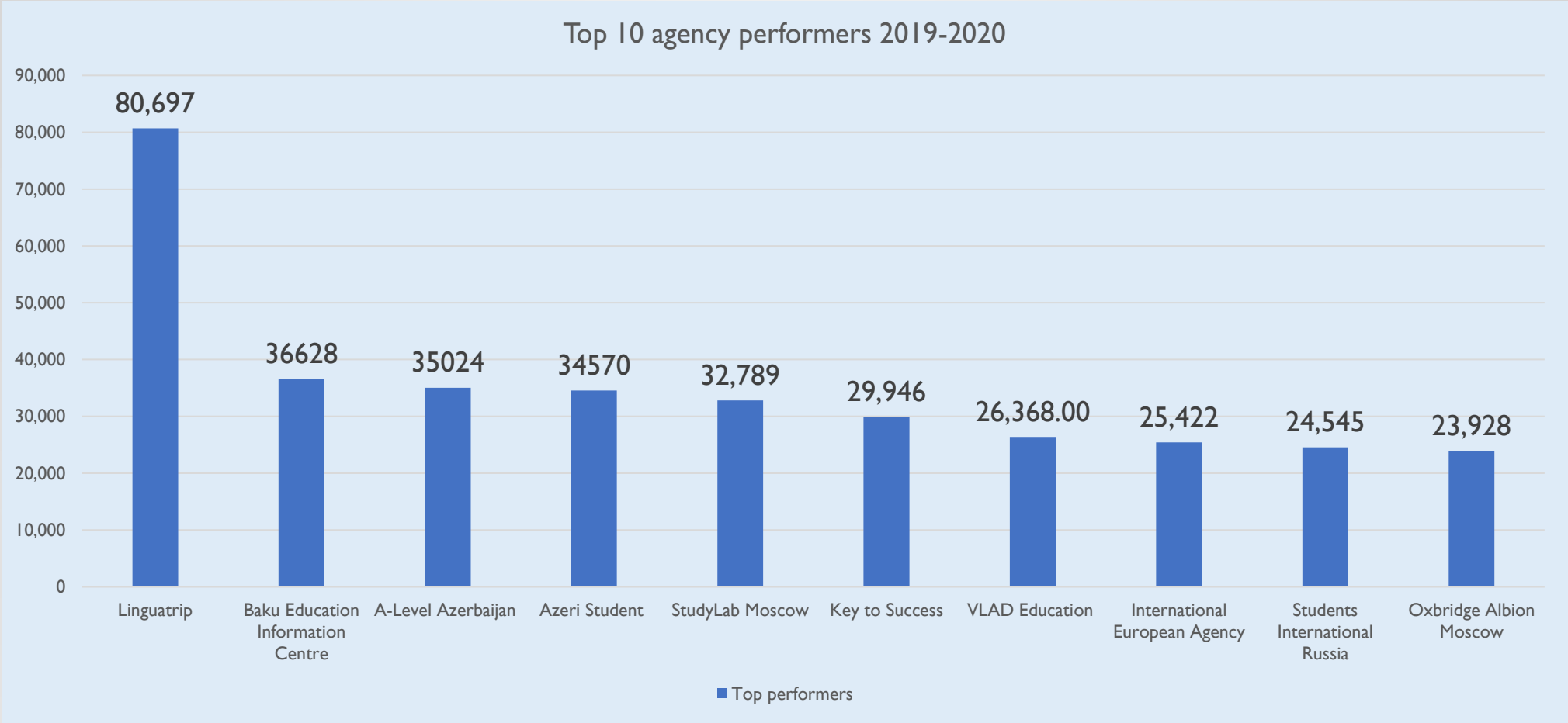
SALES CONVERSION BY COUNTRY 2019-2020

RUSSIAN MARKET IS AN ABSOLUTE LEADER AMONG CIS COUNTRIES

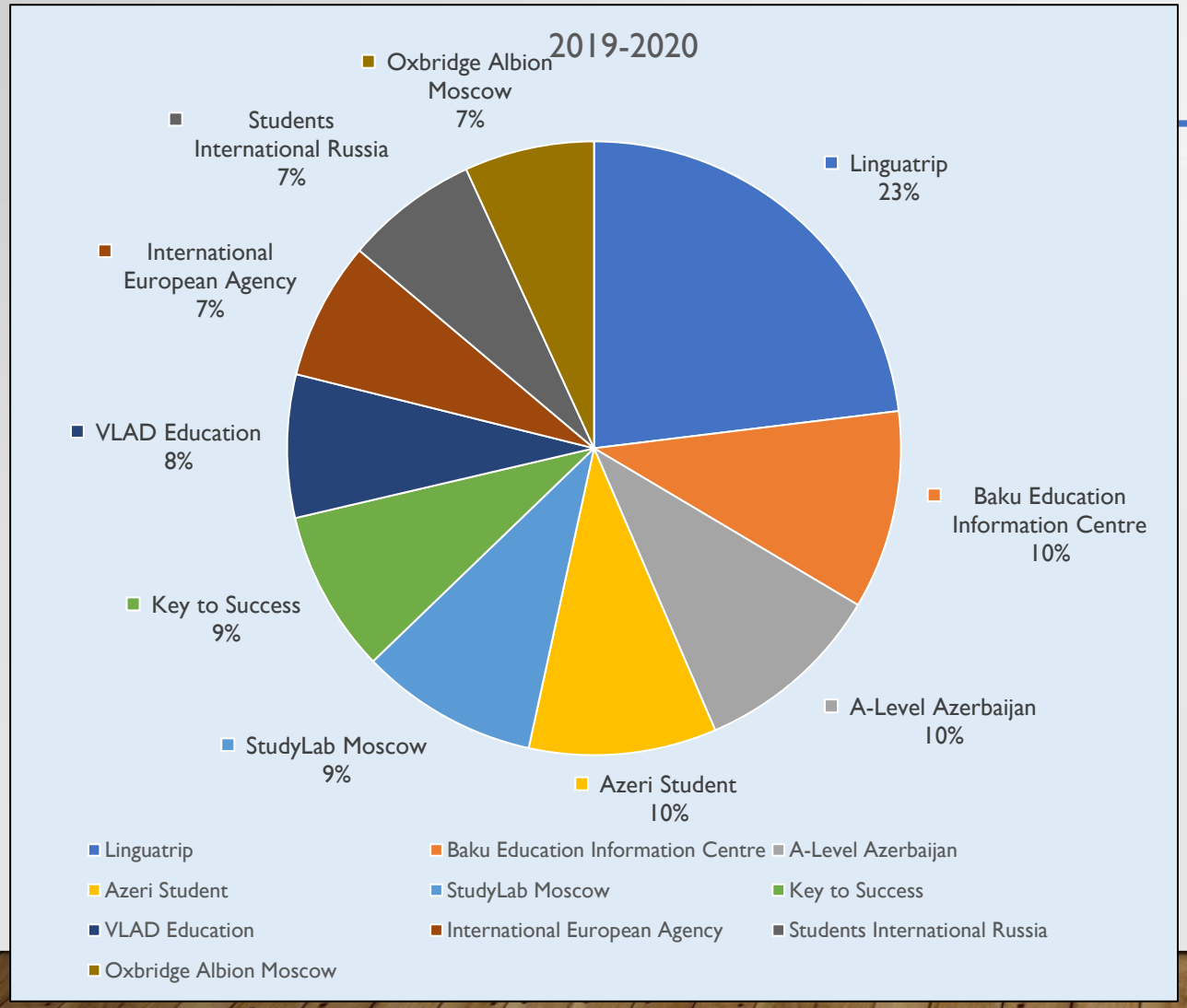


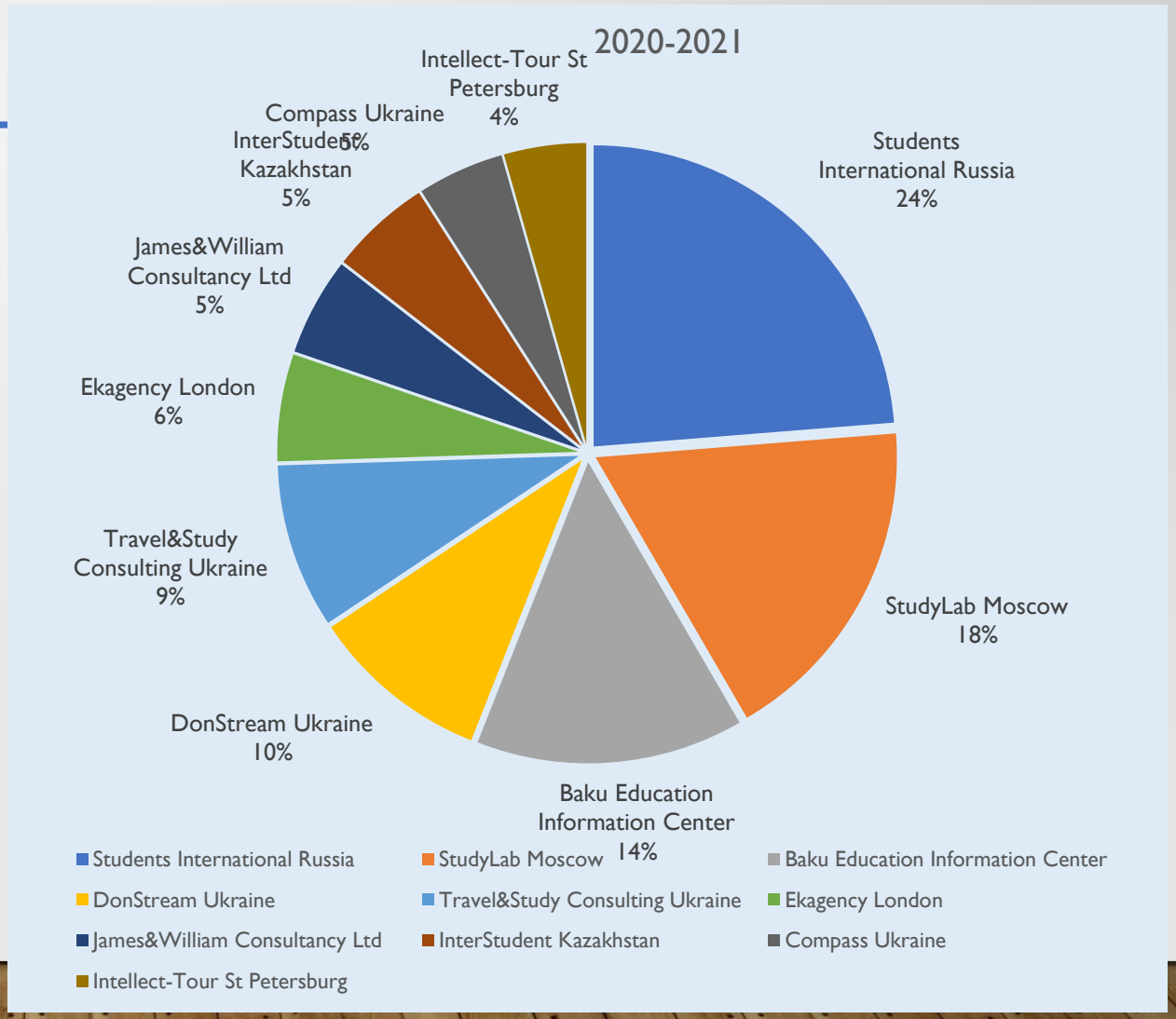

Total Sales 2019-2020
IQ Consultancy Ukraine , 17908
A-Level Azerbaijan , 35024
Student Study Ukraine, 4016
Global Compass Kyrgyzstan, 900
London Group Moscow, 4060
Xenia Simou Agency, 12188
InStudy St Petersburg, 11260
IQ Consultancy Moscow, 1768
NeoConsulting Uzbekistan, 14936
ELL Georgia, 16189
Baku Education Information Centre, 36628
Duke Education Ukraine , 14403
Azeri Student , 34570
Chelsea Education, 17328
UniWest Media, 1108
Geotek College, 12,388
UK Bridge, 3,400
VLAD Education , 26,368.00
Atlas Ukrayna, 1,760
Study4You, 6,158
Crystal Study, 13,090.00
Alpha Capital Education, 22,327
V&A Royal Education Services, 17,680
Intellect Kazakh, 19,280
InterStudent, 17,105.00
InterAcadem, 1,190
StudyLab Moscow, 32,789
Key to Success, 29,946
Capital Study, 1320
Magister Moscow, 3,490
Intellect Tour Moscow, 13,530
Connexus AA, 1,360
Premier LLC Moscow, 14240
Travelmart, 1,310
First Academy, 1920
Study British English, 980
BSI Group, 17,020
Students International Russia, 24,545
Rosk-Lingva Moscow, 710
International European Agency, 25,422
Oxbridge Albion Moscow, 23,928
InTC Yaroslavl, 1,120
Linguatrip, 80,697
Linguatrip
InTC Yaroslavl
Oxbridge Albion Moscow
International European Agency
Rosk-Lingva Moscow
Students International Russia
BSI Group
Study British English
First Academy
Travelmart
Premier LLC Moscow
Connexus AA
Intellect Tour Moscow
Magister Moscow
Capital Study
Key to Success
StudyLab Moscow
InterAcadem
InterStudent
Intellect Kazakh
Alpha Capital Education
V&A Royal Education Services
Crystal Study
Study4You
Atlas Ukrayna
VLAD Education
UK Bridge
Geotek College
UniWest Media
Chelsea Education
Azeri Student
Duke Education Ukraine
Baku Education Information Centre
ELL Georgia
NeoConsulting Uzbekistan
IQ Consultancy Moscow
Xenia Simou Agency
InStudy St Petersburg
A-Level Azerbaijan
IQ Consultancy Ukraine
Student Study Ukraine
London Group Moscow
Global Compass Kyrgyzstan

TOP 10 PERFORMING AGENCIES 2019-2020



TOP 10 PERFORMING AGENCIES – COMPARISON 2019-2020 VS 2020-2021

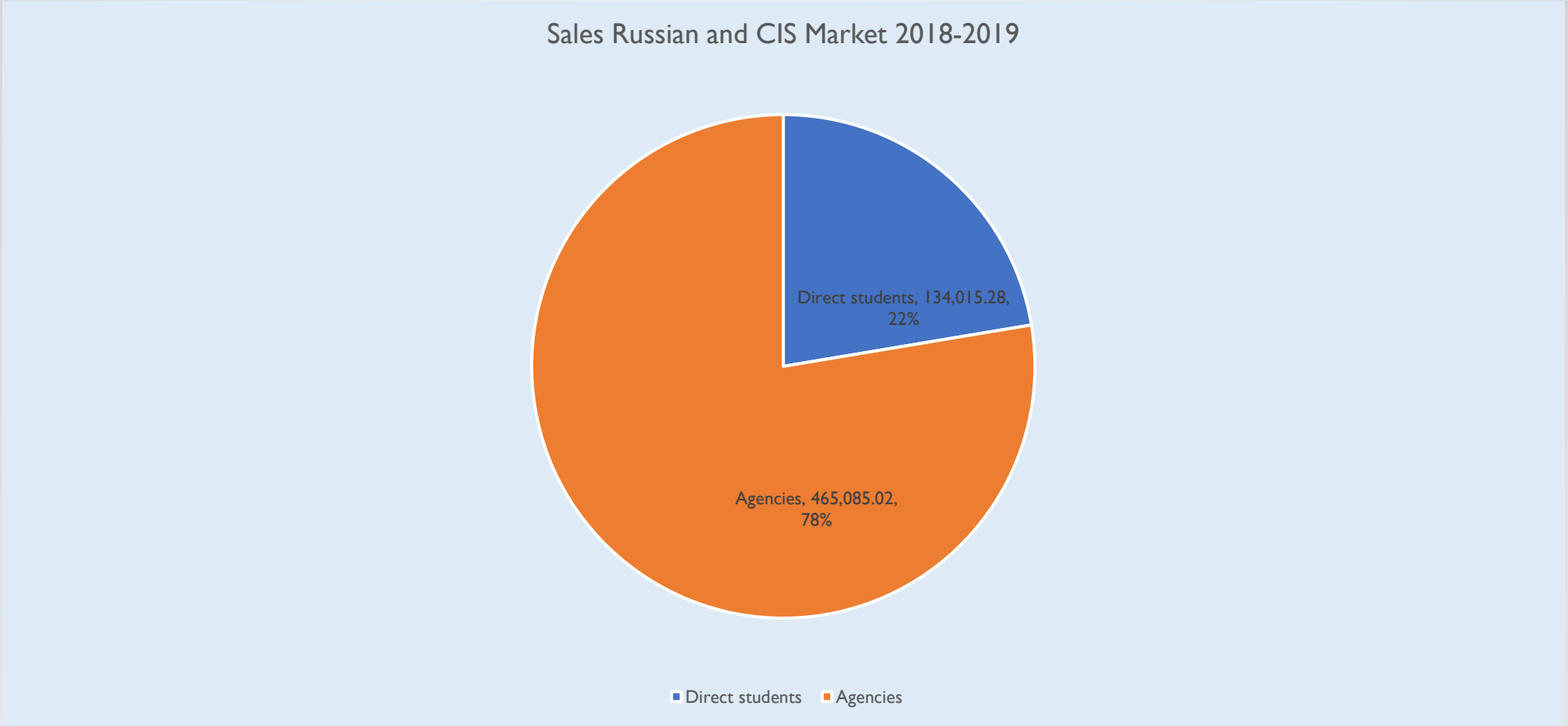




TOP 10 PERFORMING AGENCIES – COMPARISON 2019-2020 VS 2020-2021

- Further to the charts on Slide 13, the absolute leader in 2019-2020 was Linguatrip with 23% market sales conversions however due to the current quarantine restrictions Linguatrip is no longer in top10 performers 2020-2021.
- The absolute leader in 2020-2021 is Students International Russia – biggest agency in Russia and CIS .There is a positive tendency of Students International Russia overtaking market with 24% sales conversion in top 10 performers 2020-2021 vs 7% in 2019-2020.
- StudyLab Moscow and Baku Education Information Centre are the steady top performers throughout both academic years.
- We should potentially capitalise on DonStream Ukraine who can be the second top leader in CIS market.

SALES CONVERSIONS 2018-2019

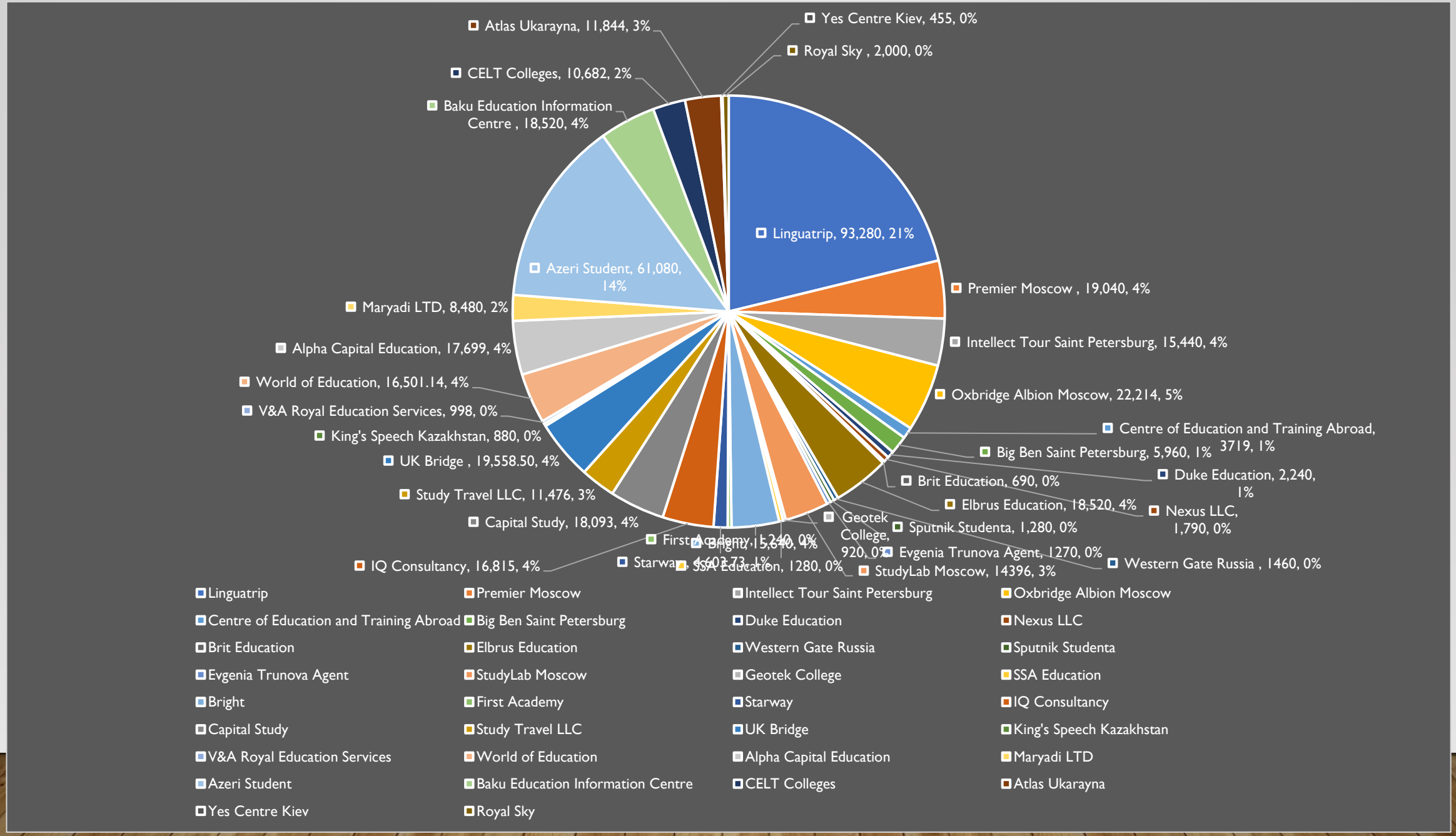


SALES CONVERSIONS 2018-2019

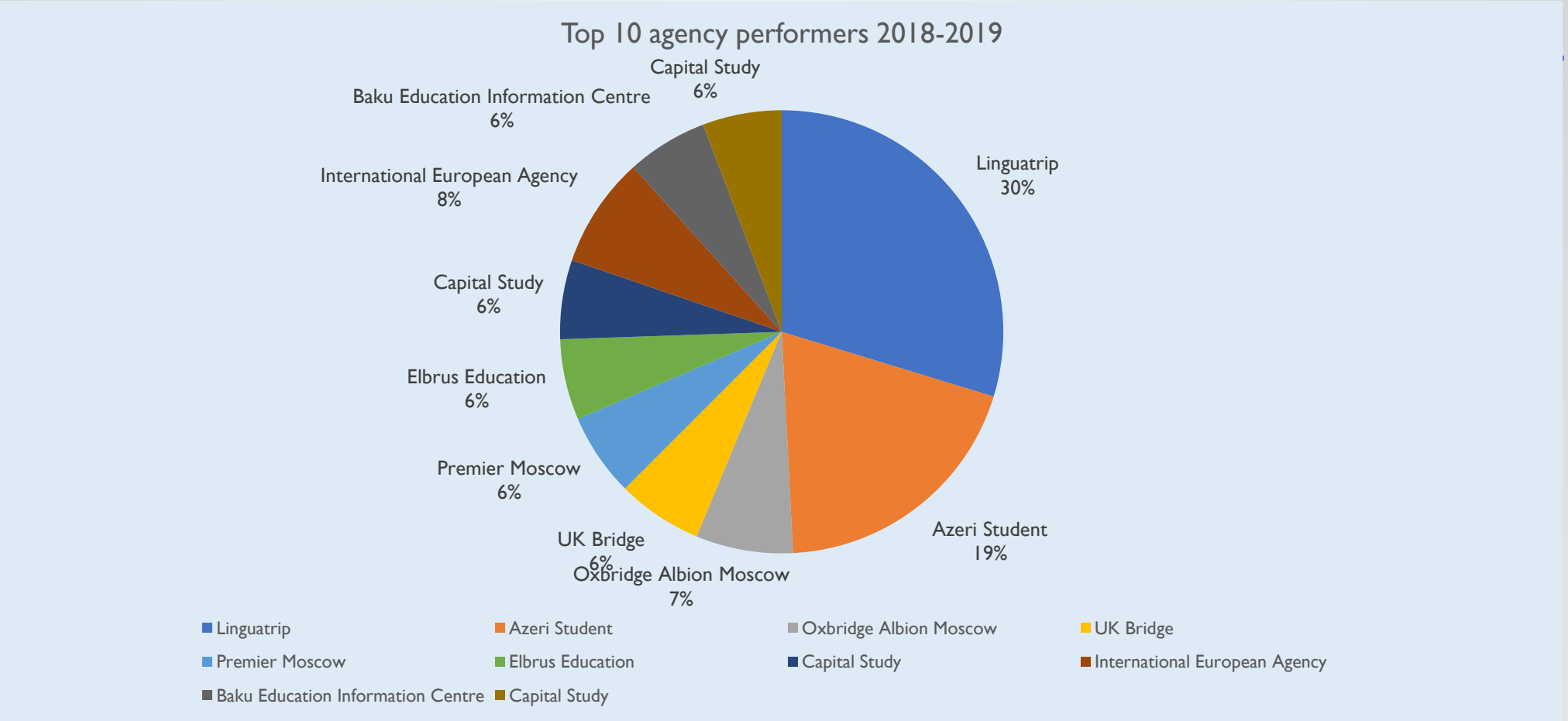
RUSSIA IS AN ABSOLUTE LEADER AMONG OTHER CIS COUNTRIES



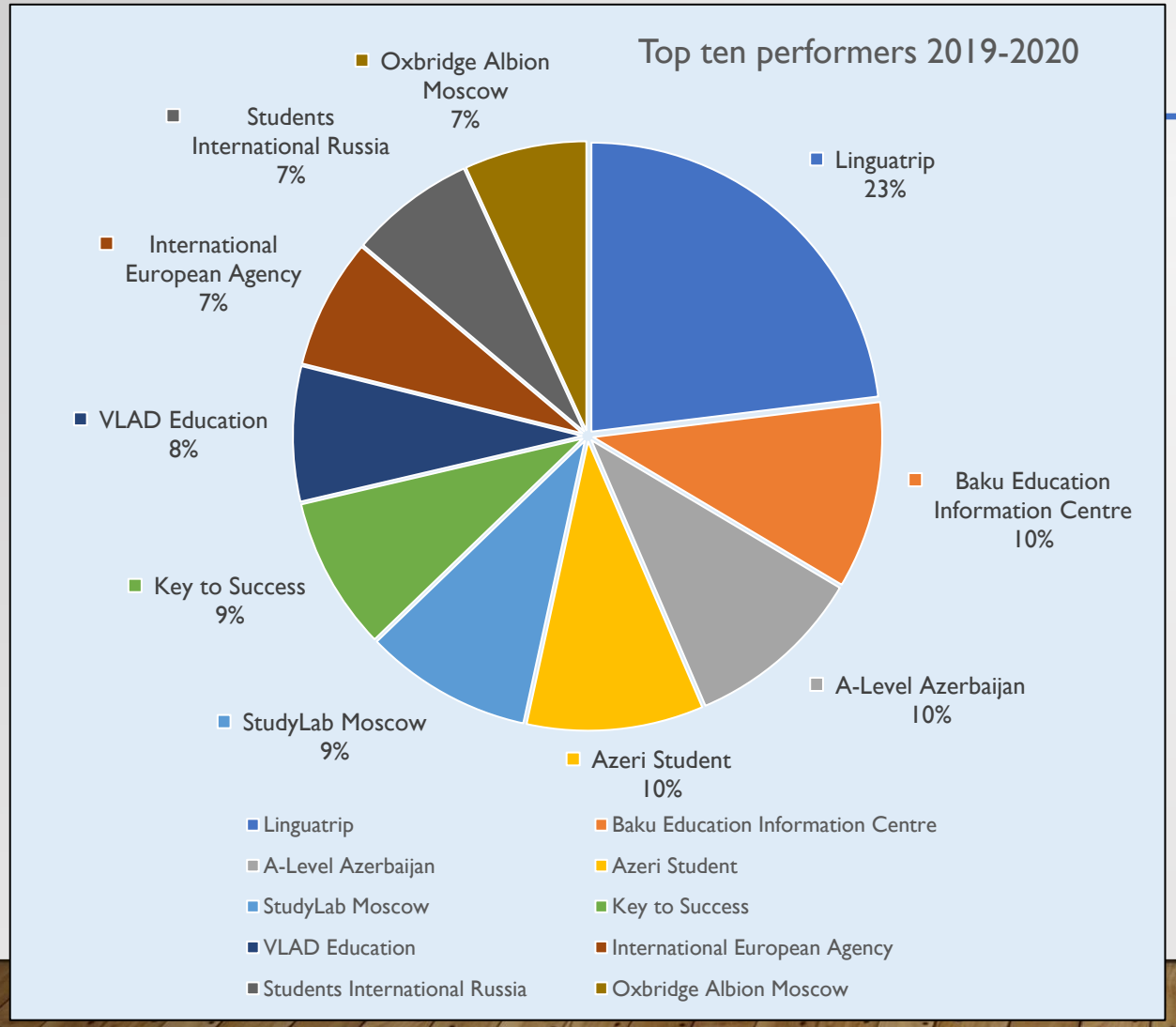
Sales conversions from agencies Russia and CIS 2018-2019

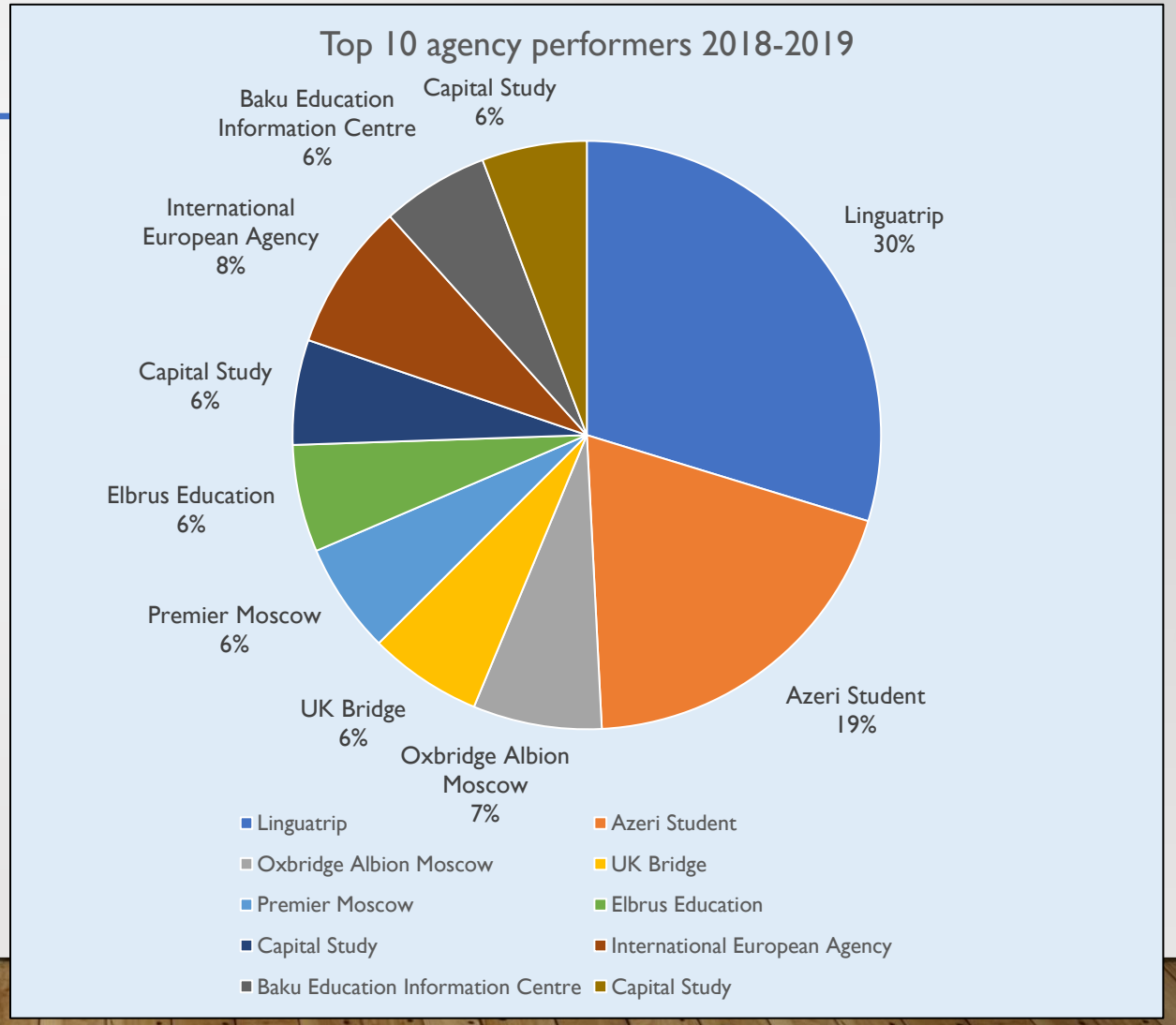


SALES CONVERSIONS 2018-2019



TOP 10 PERFORMING AGENCIES – COMPARISON 2019-2020 VS 2018-2019





TOP 10 PERFORMING AGENCIES – COMPARISON 2019-2020 VS 2018-2019

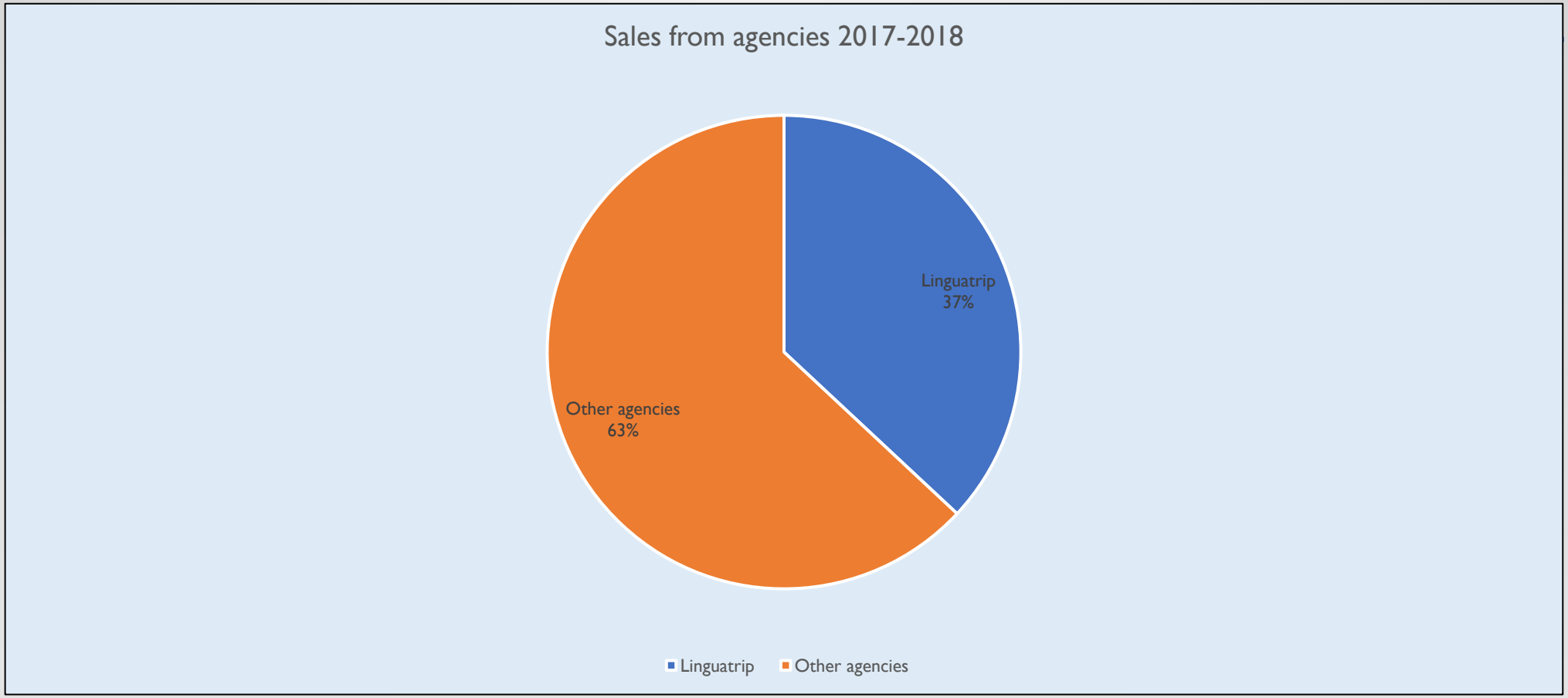
- to Baku will bLinguatrip was an absolute leader with 23% of market share in 2019-2020 and 30% market share in 2018-2019
- Azeri Students were the top second performing agency with 19% from total sales in 2019-2018 further to my trip to Baku that year.
- Agencies that brought lump sum payments are: Baku Education Information Center, Oxbridge Albion Moscow, A-level Azerbaijan.
- The chart clearly show that we should capitalise not only on Russian market but Azerbaijani too. Another business trip to Baku will bring more partnerships and lump sum payments.

SALES CONVERSIONS 2017-2018



SALES CONVERSIONS 2017-2018

LINGUATRIP IS A MARKET LEADER WITH 37% OUT OF ALL AGENCY SALES

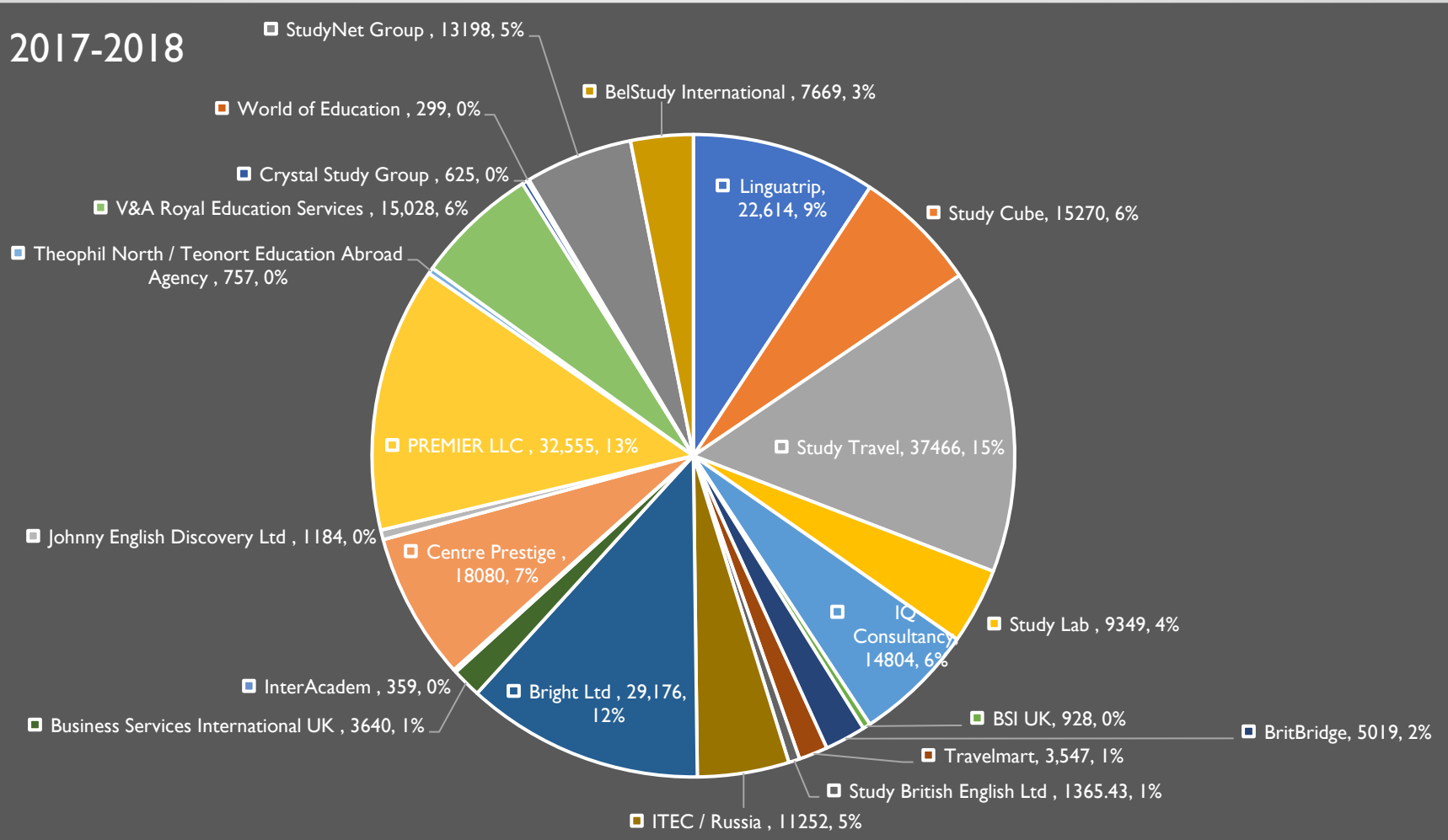


SALES CONVERSIONS 2017-2018 BY COUNTRIES

WHERE RUSSIA IS AN ABSOLUTE MARKET LEADER

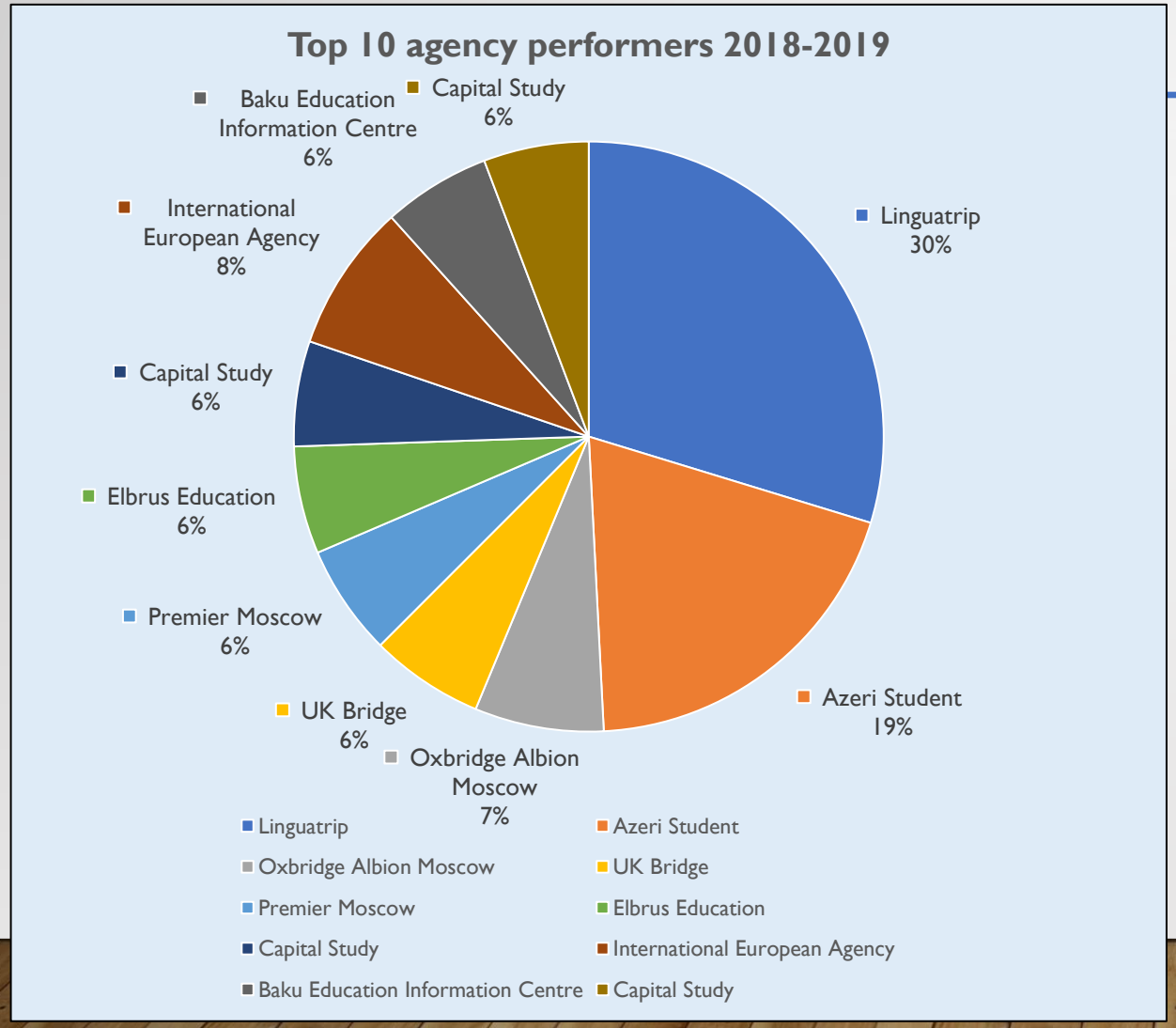


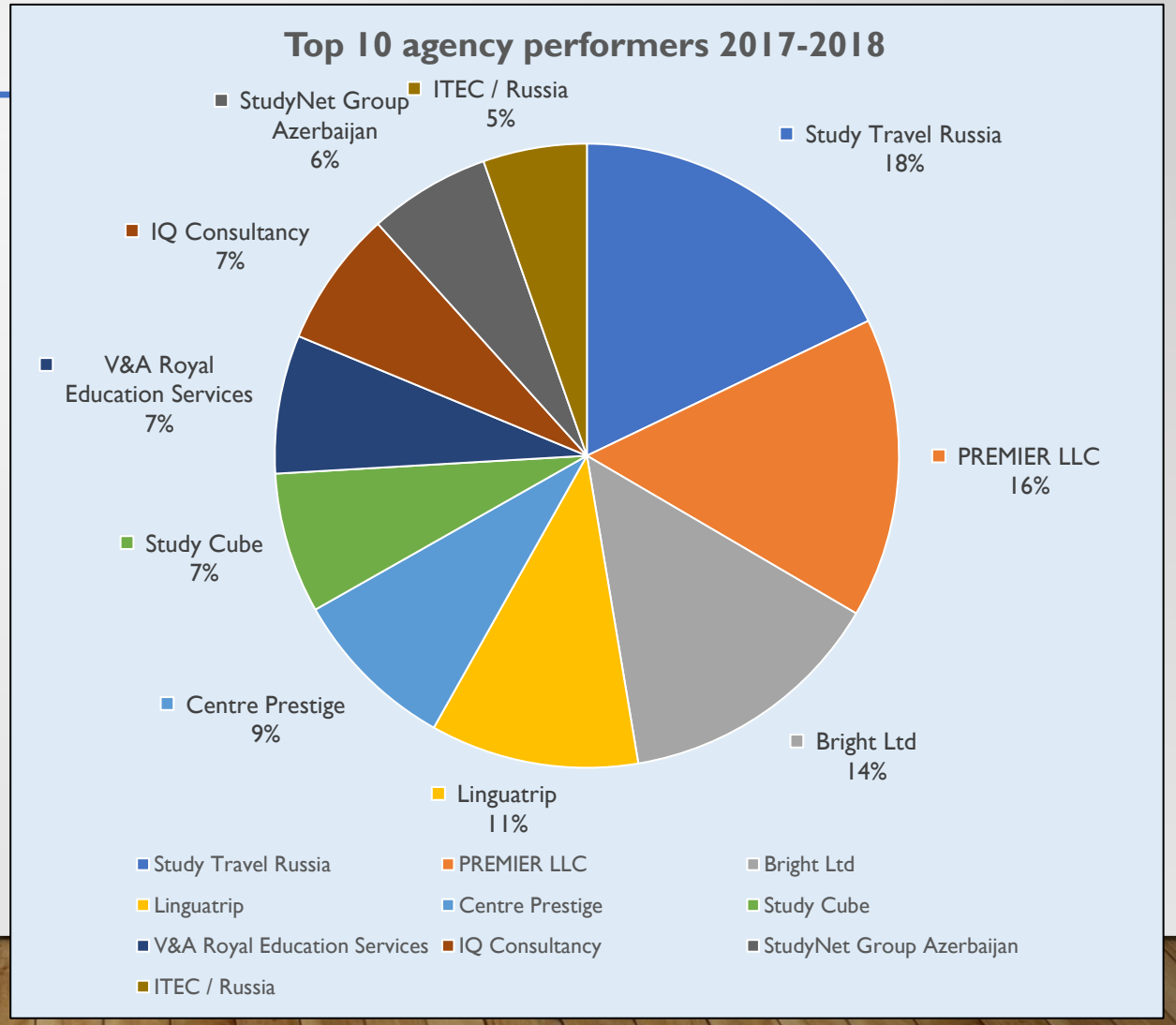
Sales conversions 2017-2018



- Linguatrip
- Study Cube
- Study Travel
- Study Lab
- IQ Consultancy
- BSI UK
- BritBridge
- Travelmart
- Study British English Ltd
- ITEC / Russia
- Bright Ltd
- Business Services International UK
- InterAcadem
- Centre Prestige
- Johnny English Discovery Ltd
- PREMIER LLC
- Theophil North / Teonort Education Abroad Agency
- V&A Royal Education Services
- Crystal Study Group
- World of Education
- StudyNet Group
- BelStudy International

COMPARISON OF TOP TEN PERFORMERS





TOP TEN PERFORMERS IN 2018-2019 VS 2017-2018

- Linguatrip only started to tap Russian market in 2017 therefore its market share is only 11% from all bookings done with Londonist VS 30% in 2019-2018
- Premier LLC Moscow showed strong performance both academic years.
- IQ consultancy is one of the agencies who actively books accommodation since 2017. They have branches in Moscow, Ufa, Kiev which I visited in person since 2017. We should potentially develop further partnership to get more conversions.