Market Research Report.

AULA 2013 REPORT

EDUCATION TRADE FAIR

SPAIN

13-17 FEBRUARY 2013
REPORT ON AULA 2013

AULA is sponsored by the Spanish Ministry of Education (Ministerio de Educación), and is an opportunity for Spanish students to explore the wide range of educational options available to them both in Spain and abroad. It is the largest and most visited education exhibition in Spain.

Name: AULA 2013 - International Educational Opportunities Exhibition

Logo: [AULA Logo]

Fair Organisers: Ifema - [www.ifema.es]

Edition: 21st
Dates: 13-17 February 2013
Location: Parque Ferial Juan Carlos I – Pavilion 5

Opening Hours: 13 - 16 February 10.00 - 19.00 hours
17 February 10.00 - 14.00 hours

Annual Event & Open to the general public

Entry fee: €4, €2 per person for groups >10 or free w/ invitation

Sectors represented:

- Undergraduate/Tertiary Studies
- Master and Postgraduate Studies
- Study Abroad
- Professional/ VET Studies
- Foreign Languages
- NGOs
- Official Institutions
- First Employment
- Student Services and Association

Visitor Profile:

- Year 10, 11 & 12 High School Students
- TAFE/VET Students
- University Students
- Parents
- Foreign Language Students
- Teachers
- People seeking further training opportunities
- Career Advisors
- Parents
AULA 2013 Visitor Statistics:

Number of Visitors: 103,589

Exhibition Hall: Net Surface Area 5, 852 m²

Number of Exhibitors: 168
Spanish: 99
International: 69
Number of countries: 10

Countries represented: Australia, Belgium, Canada, France, Germany, Ireland, Portugal, Russia, Switzerland, United States of America

The number of countries decreased from 14 in 2012 to 11 in 2013. Mexico, Japan, Netherlands, Italy and China participated in 2012 and not 2013. The only new addition in 2013 was Germany. However, the number of international institutions represented increased from 40 in 2012 to 69 in 2013.

Overview:

- AULA is Spain’s largest and most visited education exhibition. This year it attracted a total of 103,589 visitors an increase of 5% from 2012. It is a well-established and well-organised fair, now in its 21st consecutive year.

- The fair aims to promote contact between students and education institutions in order to guide students through the wide educational opportunities on offer in Spain and abroad.

- The fair was held in Pavilion 5 with a total net exhibition space of 5,852 m² with easy access for exhibitors & visitors.

- Major Spanish public and private universities, VET institutions, education centres and language schools were present.

- A total of 166 exhibitors attended this year. A slight decrease from past years; 231 in 2012 and 242 in 2011.

- AULA was covered extensively in both media and social networks with a large number of attributed articles and followings on Facebook and Twitter. Several radio and TV channels also covered the event. The Australia stand was filmed by TVE and interviewed for the Aula facebook page. To watch the interview on youtube: http://www.youtube.com/watch?v=Uxb5ZCdtNK4#t=0m38s.
2013 AULA Media Coverage Statistics

<table>
<thead>
<tr>
<th>Source</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Journalists</td>
<td>480</td>
</tr>
<tr>
<td>Accredited Media</td>
<td>295</td>
</tr>
<tr>
<td>Mentions in the Media</td>
<td>2,964</td>
</tr>
<tr>
<td>Followers on Twitter</td>
<td>2,138</td>
</tr>
<tr>
<td>Aula Facebook page visits</td>
<td>5,561</td>
</tr>
</tbody>
</table>

AUSTRALIA Future Unlimited Stand

Institutions represented
6 Australian institutions participated in the Australia Future Unlimited stand. 2 Australia based agents, 1 ELICOS provider, 1 TAFE/VET provider, 1 combined ELICOS, TAFE/VET, higher education provider and 1 secondary college as follows:

- A+ Cape: represents over 100 institutions
  www.studycapec.com

- Vamоnos Australia: represents ELICOS, TAFE/VET and higher education institutions

- Byron Bay English Language School, Byron Bay: ELICOS
  www.bbels.com.au

- Education Centre of Australia, Sydney: ELICOS, TAFE/VET & higher education
  www.eca.edu.au

- William Angliss Institute, Melbourne: TAFE/VET
  www.angliss.edu.au

- Wesley College, Melbourne: school
  www.wesleycollege.net

Overview of Australia Future Unlimited stand

- The Australia Future Unlimited stand had a good, highly visible, corner location.

- The Austrade Future Unlimited organised stand (16M²) was located in the Languages Aisle (Calle de los Idiomas) of AULA in Pavilion 5 / Stand Number 5A05

- We estimate that a little over 2,900 visitors came by the Australia stand.

- All Australian participants had good exposure on the stand with brochures displayed throughout the 5 day event and almost all units distributed to visitors.
- Participants received logistical and organisational support from Austrade prior to the commencement of AULA as well as throughout the fair.

- During the five day event, Austrade distributed a total of 2,900 local Study in Australia Contacts in Spain 2013 Guides, a 47.9% increase from the 1,960 distributed in 2012. General information, Tourism Australia promotional material and English Study in Australia guides were also distributed.

- RMIT University student on an Austrade internship program assisted throughout the five day event.

- One participant, Vamonos Australia, had a physical presence on a rostered basis and received enquiries directly from students, distributed their promotional materials and collected contact details.

- Austrade Madrid kept a register of student enquiries for follow-up, the database of 117 contact details was forwarded to participants.

- The visitor profile of the Australia Future Unlimited stand included individual high school students (Year 10, 11 & 12), students, parents, and university students, as well as teachers interested in a range of courses covering ELICOS, Undergraduate, Postgraduate, MBA’s, VET (pathway courses) and Secondary School.

**Types of enquiries at the Australia Future Unlimited stand**

The Spanish market is primarily ELICOS, this was reflected in a high number of enquiries into English courses, including foundation courses for university and summer courses. Full higher education degrees also attracted a large number of enquiries, particularly in Engineering, Marine Biology and Science. Many students also expressed interest in the opportunity to work while studying, internships and scholarships. Numerous visitors enquired about working in Australia.

The most common enquires are as follows:

- General English Language courses (ELICOS) for juniors as well as adults
- Tertiary Education – Undertaking full degrees
- Scholarships available for studies in Australia
- Internship programs
- Work and study options
- How to apply to Australian tertiary institutions
- Student Visa and Post-Study Visa information
- Completing secondary college in Australia

117 visitors left their details on the Australian Future Unlimited database to be sent further information.

During the first 2 days of the fair (Wednesday & Thursday), the primary visitor group to the Australia Future Unlimited stand were high school aged students (15-18 year olds) mainly interested in:
- General information on Australia.
- English language courses available in Australia during the Spanish summer.
- Information on higher education courses available.

During the last 3 days of the fair (Friday, Saturday and Sunday) there were a greater number of more informed enquiries from students accompanied by their parents, as well as university students and teachers. This included information about specific tertiary education courses or universities and information about student and post-graduate visas.

The following material was distributed at the Australia Future Unlimited Stand:

- Brochures and materials from all of our co-exhibitors
- 2,900 general Study in Australia Contacts in Spain 2013 Guides (Objetivo Estudiar en Australia)
- Tourism Australia “Nada Como Australia” Brochures in Spanish
- Flyers/Fact Sheets on general information, websites, grants, scholarships, Visas.
- Australian promotional products: kangaroo pins, clip on koalas, posters and maps

Fairs running concurrently with Aula

Foro del Postgrado/Postgraduate Fair

- **Foro de Postgrado (Postgraduate Exhibition),** which exhibited in Pavilion 2, was run concurrently with Aula for the fourth consecutive year.

  The exhibition aims to provide young people with the best information possible on postgraduate options in Spain and abroad.

  - Net surface area 700m2
  - 3, 487 visitors
  - 105 exhibitors
  - Countries represented Spain, Australia, Germany, United States of America, Netherlands, Portugal, UK.
  - Facebook visits: 4,116
  - Twitter followers: 832

- **La Olimpiada de la Formación Profesional** - Worldskills Spain, the Vocational Training Olympics ran concurrently with Aula for the first time, students from all over Spain competed in 32 events related to their vocational studies.

Additional Information of Interest

Spanish Ministry of Education Scholarships – Becas Mec

In past years The Spanish Ministry of Education has awarded grants to Spanish students to undertake English language study abroad, for a minimum 3 week English language course in a country where English is the official language. However, this year, due to government austerity measures these grants will not be awarded. Aseproce, the Spanish association of promoters of overseas courses, has stated in a press release that the suspension of these scholarship is an unfortunate measure, because studying English in Spain is no substitute for studying English in an English speaking country.
However, Aseproce also stated that in their opinion this measure will not have a significant impact on the sector. The full press release can be viewed on their website:  
http://www.aseproce.org/Prensa/DetallePrensa/12/supresi-n-de-becas-por-parte-del-ministerio-de-educaci-n  

Further information regarding 2013 scholarships is available on the Ministry of Education website:  

New Australian Postgraduate visa  

In November 2011 a postgraduate visa was introduced. International students graduating in Australia with a Bachelor Degree or Masters Degree by course may work for up to two years in Australia. Students graduating in Australia with a Masters by research or a Doctorate may work up to three and four years respectively.

Key English Language Destinations for Spanish students  

- The UK and Ireland continue to be the most popular traditional destinations for Spaniards seeking ELICOS courses, 50-60% of all students choose the UK. Main attractions include proximity to Spain, familiarity, expected high quality education and the low cost of airline travel.  
- The USA is the traditional alternative to the UK, attracting 15-20% of students; it is especially popular for its high school programs. Due to Euro/US$ exchange rate, it has become more affordable for Spanish students.  
- Canada is also becoming a more popular destination and an alternative destination to the USA or the UK. Another advantage is the availability of Working Holiday Visas.  
- Malta was a popular destination for the short-term courses (less than 1 month) undertaken during the Spanish summer in July and August. However, Malta is no longer as popular due to an oversaturation of Spanish students and reportedly poor student infrastructure/services.  
- New Zealand is considered a safe, price competitive market for middle to long term stays. The Working Holiday Visa, introduced in 2009, is an added advantage, although the annual quota of 200 limits impact on student numbers. According to NZ Department the quota opened on 27 April 2012 at 10:00am (New Zealand time) and was filled within a very short time.  
- Australia is appealing for middle to long term stays due to price competitiveness, relatively low numbers of Spanish speaking students and the perception of Australia as an attractive tourism destination. A huge advantage for Australia is the ability to work with a Student Visa and the new postgraduate visa allowing graduates of degrees, masters or PhDs to work in Australia. However, the current high A$ rate is seen as a disadvantage.

Conclusions & Recommendations  

- Spanish student numbers in Australia have been increasing over the past five years. 2012 statistics show a 150% increase over 2009 stats despite Spain’s economic situation. Between 2011 and 2012 total enrolments increased 47.5%.  
- Due to Spain’s poor performance with foreign language skills, Spain is largely an ELICOS market with ELICOS accounting for 61.7% of all enrolments in 2012.
• Between 2011 and 2012 ELICOS enrolments increased 43.7%, higher education enrolments increased 18.9% and VET enrolments increased 76.9%.

• Knowledge and awareness on Australia’s education capability as well as a marked interest in visiting the country has increased. However, the strength of the Australian dollar is a factor that influences the competitiveness of Australia as a study destination. Initiatives such as promotional ELICOS packages have proved to be successful in attracting potential students.

• The link between studying and travelling in Australia should not be undervalued as a prime motivator for Spanish students. Many students expressed interest in Australia as a tourist destination, before enquiring about studying opportunities. We recommend that tourism information about Australia as a whole, cities and student lifestyles specific to your own institutions be promoted alongside the educational opportunities.

• Many students enquire about employment opportunities in Australia that could be undertaken concurrently with courses of study. Hence, institutions that offer assistance with the process of finding part-time work, such as advice on the Australian job market, sources of information, assistance with CVs, etc., have a competitive advantage in this market.

• We recommend Australian institutions to have continued contact with their overseas agents and provide them with up to date material such as:
  - Promotional CD/DVDs of not only your centre, but also of the city and/or state
  - Cost of living comparison tables (UK, US & Australia)
  - Comparative costs in accommodation, weekly travel card, cinema ticket, etc., between other major Australian cities

• The www.studyinaustralia.gov.au/spain site is the key online source for Spanish students considering courses in Australia. Please take time to check the agent directory to see if the information is correct. If the information needs to be updated then please inform Austrade.

• Use the testimonials of Spanish students who have studied at your centre for website promotion, inserts in promotional materials, etc.

• Consider advertising in the Spanish Study Guide “Estudiar en Australia – Contactos en España” published by Interface Tourism Spain www.interfacetourism.es and endorsed by Austrade Madrid. (Please contact Austrade if you would like to receive a copy of this guide.) Also consider advertising in the printed and electronic education media in Spain.

• Spain does not have a Working Holiday Agreement in place. Agents and exhibitors agreed that the establishment of a Working Holiday Visa with Spain would entice and allow far greater number of Spaniards to travel to Australia, as well as improve their ability to compete with the European market where such agreements are already in place.

• Remember: As part of Austrade’s services, Austrade Madrid can provide a variety of tailored services including trade fair participation, co-ordination of in-market visit programs, etc., in accordance with Austrade’s Client Service Policy.
Forthcoming Events

- Aula 2014
- Foro del Postgrado 2014
- Futuralia 2014

All dates are yet to be confirmed.

For further information on Austrade’s services please contact:

Austrade Project Manager

This report has been prepared by Janine Taylor, Education Manager, and Austrade Madrid, who can be contacted as follows:

Mobile: +34 699 333 351
Direct Telephone: +34 91 427 37 63
Austrade Reception: +34 91 427 37 62
Fax: +34 91 442 38 85
Email: Janine.Taylor@austrade.gov.au
Street Address: Torre Espacio - Paseo de la Castellana, 259 D, PL 24 28046 Madrid Spain
Appendix 1 – AULA INTERNATIONAL EXHIBITORS

Australia
A+ Cape - www.studycape.com
Byron Bay English Language School - www.bbels.com.au
Education Centre of Australia - www.eca.edu.au
William Angliss Institute - www.angliss.edu.au
Wesley College - www.wesleycollege.net

Belgium
Easy Languages – www.easylanguages.es

Canada
HEC Montreal – www.hec.ca
University of Montreal - http://www.umontreal.ca/english/
University of Victoria - http://www.uvic.ca/

United States
Eastern Michigan University - http://www.emich.edu/
Florida Atlantic University - http://www.fau.edu/
Florida International University - http://www.fiu.edu/

France
Educamia.org - www.educamia.org
Essec Business School - http://www.essec.edu/

Germany

Ireland
Tourism Ireland - www.turismodeirlanda.com/ingles

Portugal
Instituto Politécnico de Bragança - www.ipb.pt

Russia

Switzerland
SHMS, Swiss Hotel Management School - www.swisseducation.com
Culinary Arts Academy - http://www.culinaryinstitute.ch/
Hotel Institute Montreux, HIM - http://www.him.ch/
IHTTI, School of Hotel and Design Management - http://www.ihtti.com/
SEG, Swiss Education Group - http://www.swisseducation.com/
Appendix 2

Exhibitors – Spain Overseas Language Courses

Club Ivy Spain – www.clubivy.com
EF Educación – www.ef.com
Enforex, S.L – www.enforex.com
ESL – Idiomas en el Extranjero – www.esl-idiomas.com
FSL – www.fsl.es
Get Ready Idiomas en el Extranjero – www.getready.es
Holy Child Say Language – www.holychild.net
Infoidiomas – www.infoidiomas.com
ITEA – Cursos de Idiomas en el Extranjero – www.itea-idomas.com
Midleton School – Cursos de Inglés en el Extranjero – www.midletonschool.com
Sheffield Centre – www.losidiomas.com

Other

Education Web Portals
Aprendemas.com- www.aprendemas.com

Professional Press
Entre Estudiantes – www.entreestudiantes.com
Kampussia – www.kampussia.com
Y ahora Que: yaq.es – www.yaq.es

Associations
ASEPROCE – www.aseproce.org

Aula fair organizers did not publish a printed catalogue. A full list of participants is available at:
http://www.ifema.es/catalogo/paginasWeb/catalogo_contenido_busqueda_principal_es.jsp
Disclaimer
Austrade does not endorse or guarantee the performance or suitability of any introduced party or liability for the accuracy or usefulness of any information contained in this Report. Please use commercial discretion to assess the suitability of any business introduction or goods and services offered when assessing your business needs. Austrade does not accept liability for any loss associated with the use of any information and any reliance is entirely at the users’ discretion.

Why You Need To Know About Foreign Bribery and its Implications:
Bribing, attempting to bribe or facilitating bribery of a foreign public official is a serious crime and amendment to the Australian Criminal Code in 1999 makes acts of this nature overseas punishable in Australia.
Companies can also be held criminally responsible for the acts of their agents.
The extraterritorial nature of these penalties reflects the serious criminal nature of bribery and the detrimental effects it has on Australian trade and reputation, and international governance.
It is no defence that such acts may be common practice in some countries. You must be aware of the types of activities that are legal and illegal when interacting with foreign officials. The offence applies regardless of the outcome or result of the bribe or the alleged necessity of the payment: companies and individuals may be held liable regardless of whether or not the bribe obtains the advantages sought and whether or not the bribe was considered necessary to do business.
Refer to Attorney-General’s Department Foreign Bribery website: http://www.ag.gov.au/foreignbribery