Prepared for success - ELICOS

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20 October 2016
A connected sector – Student visa (all sectors)

Sourced from the Austrade international Student data.

ELICOS
145,298
MONTHLY TIME SERIES OF STOCK, FLOW AND YEAR TO DATE OF STUDENT ENROLMENTS - ELICOS

Sourced from the Austrade international Student data.
The complete picture for ELICOS

• Department of Education and Training funded sector wide survey.

• 20\textsuperscript{th} Year of publication.

• Excellent sector wide participation.

• English Australia member colleges accounted for 86\% of total enrolments in 2015.
Importance of the combined visa programs

* prior to 2009, working holiday & other visas were combined together
Connecting with students globally

- **Europe**: 13% (2015), 16% (2014)
- **M.East & N.Africa**: 4% (2015), 4% (2014)
- **Sub-Saharan Africa**: 1% (2015), 1% (2014)
- **Americas**: 14% (2015), 13% (2014)
- **Asia Pacific**: 68% (2015), 66% (2014)
Market performance – Asia Pacific

TOTAL NUMBER OF ENROLMENTS

<table>
<thead>
<tr>
<th>2015</th>
<th>116,409</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>108,273</td>
</tr>
<tr>
<td>INCREASE</td>
<td>+8,136</td>
</tr>
</tbody>
</table>

CHINA
+6,166

JAPAN
+1,363

SOUTH KOREA
+2,209

These were also the three key countries.
Market performance – the Americas

TOTAL NUMBER OF ENROLMENTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Enrolments</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>24,603</td>
<td>+15%</td>
</tr>
<tr>
<td>2014</td>
<td>21,408</td>
<td>+3,195</td>
</tr>
</tbody>
</table>

Brazil: 51%
Colombia: 34%

Brazil up +23%.
Market performance - Europe

Europe declined to 3rd ranked ELCOS region.

Total number of enrolments:
- 26,081 in 2014
- 21,855 in 2015 (16% decrease)

Enrolment drops:
- Italy: 5,345 (18% decrease)
- Germany: 42%
- France: 24%
- Switzerland: 7%
Market performance - Middle East and North Africa

TOTAL NUMBER OF ENROLMENTS
7,105 2015
7,051 2014

MIDDLE EAST AND NORTH AFRICA
THERE WERE MIXED RESULTS ACROSS THE REGION WITH SOME COUNTRIES EXPERIENCING SIGNIFICANT POSITIVE SHIFTS

AND OTHERS STRONG NEGATIVE SHIFTS:
Libya -60%  Kuwait -42%
Iraq   -38%   Egypt   -30%
Turkey -22%  Lebanon -17%
Top 10 Source Countries in 2015 - ELICOS
Top 10 as % of total market

**ELICOS STUDENTS**

- **76%**
  - **2015**
  - **2010**
  - **China**
  - **Japan**
  - **South Korea**
  - **Brazil**
  - **Thailand**
  - **Columbia**
  - **Taiwan**
  - **India**
  - **Vietnam**
  - **Italy**
  - **Up 2%**

- **43%**
  - **2015**
  - **China**
  - **South Korea**
  - **Japan**

- **21%**
  - **2015**
  - **China**

- **Up 3%**
Top 5 Nationalities with Enrolment Increases

FIVE LARGEST INCREASES 2014-2015

CHINA
35,528 2015
29,362 2014
\(\uparrow 21\%\)
\(+6,166\)

SOUTH KOREA
16,266 2015
14,057 2014
\(\uparrow 16\%\)
\(+2,209\)

BRAZIL
12,641 2015
10,259 2014
\(\uparrow 23\%\)
\(+2,382\)

JAPAN
19,809 2015
18,446 2014
\(\uparrow 7\%\)
\(+1,363\)

TAIWAN
8,291 2015
7,435 2014
\(\uparrow 12\%\)
\(+856\)

Note: All in top 10 countries.
Top 5 Nationalities with Enrolment Decreases

FIVE LARGEST DECREASES 2014-2015

THAILAND

VIETNAM

ITALY

GERMANY

INDIA

10,269 2015
11,888 2014

6,174 2015
7,480 2014

5,354 2015
6,562 2014

1,469 2015
2,546 2014

6,509 2015
7,503 2014

14% -1,619
17% -1,306
18% -1,208
42% -1,077
13% -994

Note: Four of these are in top 10 countries (not Germany).
ELICOS students on a journey

Dept. Education and Training Pathway data (student visa)
Students in ELICOS: Number of sectors recorded (2014 ELICOS cohort)

- ELICOS and two others: 8%
- ELICOS and three or more others: 0.3%
- ELICOS only: 30%
- ELICOS and one other: 62%

Dept. Education and Training Pathway data (student visa)
ELICOS Sector and pathway connections

- **Plus Non-award**: 8%
- **Plus Schools**: 3%
- **Plus VET**: 27%
- **Plus Higher education**: 37%
- **ELICOS only**: 30%

Dept. Education and Training Pathway data (student visa)
Note: total % is above 100 as some students enrol in multiple sectors in one year.
# ELICOS Sector and inter-sector pathways

## Top 10 nationalities and their direct and indirect inter-sector study pathways from ELICOS (2014 ELICOS cohort)

<table>
<thead>
<tr>
<th>Nationality</th>
<th>ELICOS only</th>
<th>ELICOS - Higher education</th>
<th>ELICOS - VET</th>
<th>ELICOS - Schools</th>
<th>ELICOS - Non-award</th>
<th>Total</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>8.3%</td>
<td>73.3%</td>
<td>7.4%</td>
<td>7.2%</td>
<td>11.7%</td>
<td></td>
<td>18,165</td>
</tr>
<tr>
<td>Brazil</td>
<td>39.4%</td>
<td>1.4%</td>
<td>25.5%</td>
<td>0.1%</td>
<td>33.8%</td>
<td></td>
<td>6,355</td>
</tr>
<tr>
<td>India</td>
<td>4.6%</td>
<td>62.2%</td>
<td>48.6%</td>
<td>0.4%</td>
<td>0.9%</td>
<td></td>
<td>5,519</td>
</tr>
<tr>
<td>Thailand</td>
<td>45.8%</td>
<td>7.4%</td>
<td>46.6%</td>
<td>0.8%</td>
<td>0.3%</td>
<td></td>
<td>4,977</td>
</tr>
<tr>
<td>Vietnam</td>
<td>27.8%</td>
<td>40.8%</td>
<td>33.6%</td>
<td>3.2%</td>
<td>4.2%</td>
<td></td>
<td>4,719</td>
</tr>
<tr>
<td>Korea, Republic of (South)</td>
<td>37.5%</td>
<td>13.3%</td>
<td>44.6%</td>
<td>2.3%</td>
<td>1.5%</td>
<td></td>
<td>3,424</td>
</tr>
<tr>
<td>Colombia</td>
<td>73.1%</td>
<td>5.5%</td>
<td>21.4%</td>
<td>4.0%</td>
<td>0.5%</td>
<td></td>
<td>3,189</td>
</tr>
<tr>
<td>Japan</td>
<td>65.6%</td>
<td>6.3%</td>
<td>17.8%</td>
<td>1.5%</td>
<td>5.6%</td>
<td></td>
<td>2,999</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>44.4%</td>
<td>41.1%</td>
<td>10.0%</td>
<td>0.1%</td>
<td>7.5%</td>
<td></td>
<td>1,819</td>
</tr>
<tr>
<td>Taiwan</td>
<td>45.1%</td>
<td>15.9%</td>
<td>33.9%</td>
<td>0.1%</td>
<td>1.8%</td>
<td></td>
<td>1,607</td>
</tr>
</tbody>
</table>

**Legend (% of total):**
- 40% to <50%
- 50% to 70%
- >70%
ELICOS students from India and China

Dept. Education and Training Pathway data (student visa)

Note: total % is above 100 as some students enrol in multiple sectors in one year.
Higher Education Sector

Dept. Education and Training Pathway data (student visa)
Higher Education - China

- ELICOS - Higher education: 49%
- Higher Education only: 31%
- Non-award - Higher Education: 12%
- VET - Higher Education: 3%
- Schools - Higher Education: 5%

Dept. Education and Training Pathway data (student visa)
Higher Education - Vietnam

- ELICOS - Higher Education: 48%
- VET - Higher Education: 9%
- Schools - Higher Education: 6%
- Non-award - Higher Education: 7%
- Higher Education only: 30%

Dept. Education and Training Pathway data (student visa)
Vocational Education and Training Sector

Dept. Education and Training Pathway data (student visa)
Dept. Education and Training Pathway data (student visa)
Where to connect in the future?

Deloitte Access Economics

Growth and opportunity in Australian International Education

A report prepared for Austrade

December 2015
How large is the onshore opportunity for Australia?

Australia has historically performed strongly – consistently ranking as a destination of choice for many major source markets

- Australia’s onshore enrolments international education are forecast to grow to **940,000 by 2025** (3.8% average annual growth)
  - This amounts to export earnings in excess of $33 billion – almost doubling today’s levels

**ELICOS Focus**

- Strong pathways from ELICOS into further study in higher education and VET will help to drive growth in commencements and enrolments
- Enrolments are forecast to grow to **187,000 by 2025** (2.4% per annum)
How large is the onshore opportunity for Australia?

- China: 7,200
- Thailand: 4,400
- Brazil: 4,200
- India: 3,600
- Vietnam: 3,600
- Japan: 2,600
- Republic of Korea: 2,500
- Saudi Arabia: 1,800
- Italy: 1,100
- Pakistan: 900
- Malaysia: 800

- China: 1.9%
- Thailand: 3.0%
- Brazil: 2.8%
- India: 3.5%
- Vietnam: 3.1%
- Japan: 3.5%
- Republic of Korea: 2.9%
- Saudi Arabia: 3.1%
- Italy: 2.8%
- Pakistan: 4.4%
- Malaysia: 3.9%
‘After meeting universities’ entry requirements, many don’t have the level of English needed to successfully undertake a degree course’.

April 2015
‘Continuous pressure not to be too demanding when it comes to language skills’

‘so there is continuous pressure not to be too demanding when it comes to language skills, and if at all possible, to pass students as they undertake their degree-courses’

- Is Australia hooked on international students?

By Unconventional Economist in Australian Economy

August, 2015.
A shared responsibility

Stakeholders

Parents/Family
Receiving Institute
Home Country
ELICOS Centre
Future Workplace
Australia

International Student of the year 2014
Harriyadi Irawan
How can we, as an industry, help ensure international students are prepared for success in their further studies?
ELICOS Success through connectivity:
Thinking together, working together to support student readiness & success
Some examples of:

• English Australia initiatives that support and promote best practice in the industry

• The role of connectivity & partnerships in producing best practice
Guide to Best Practice in
‘Direct Entry’ Programs
2016

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Guide to Best Practice in
‘Direct Entry’ Programs in Moderation and Validation
2016

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Aims of the Guide:

• Ensure reflection on the delivery & quality of programs

• Support ELICOS industry in development of policies, procedures and practices

• Provide a benchmarking tool

• Connect colleges through a community of best practice

• Promote connectivity between ELICOS providers and all stakeholders in providing high quality programs
5 areas of focus:

A. *Delivery Context*

B. *Program structure, content and methodology*

C. *Student placement, progress and achievement*

D. *Resourcing*

E. *Quality Assurance* Moderation and Validation
   
   (internal and external)
A. Delivery Context

Best practice:

• ELICOS provider and receiving institutes work as partners in the shaping and development of the ELICOS provider’s curriculum, policy and procedures
  - Imperative in all contexts for all provider types

Example:
College C and its receiving institution both implement the i-graduate International Student Barometer

Through collaboration use the data to inform improvements of their programs and services
B. Program structure, content and methodology

Best practice:

ELICOS providers consult regularly with receiving institutions to ensure the structure, content, outcomes and delivery of their programs remain relevant and effective.

Example:

One receiving institution requested that students are better prepared for group work. The pathway college developed an online group work culture. Groups of 4 students plan, research and note-take for assignments.
C. Student placement, progress and achievement

Best practice:
1. Shared and clear understanding difference between
   A. language proficiency at a point in time
   B. competency in academic language in DEP

2. Sharing of information on student progress

Example:
One College makes information from consultations with students re progress and support offered available to RI.
D. Resourcing

Best Practice:
1. Key resource: Mutual support for ELICOS provider & for receiving institute

Example: One ELICOS provider that has a direct entry agreement with a VET provider:
   a. Uses the relationship to inform the development of the ELICOS program
   b. The RTO utilises the ELICOS provider in ongoing English support for VET students.
E. Quality Assurance
External Validation of students’ levels of achievement

Three main features external validation:

1. Benchmarking
2. Input of experts
3. Student feedback

Result: Continuous improvement
External Validation
Outcomes Benchmarking: The guide considers

<table>
<thead>
<tr>
<th>Forms of outcomes benchmarking</th>
<th>Frequency</th>
<th>Accountability</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodic external testing</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Tracer studies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benchmarking with different colleges</td>
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</tbody>
</table>
## External Validation: Outcomes Benchmarking

### Best practice example

<table>
<thead>
<tr>
<th>Forms of outcomes benchmarking</th>
<th>Frequency</th>
<th>Accountability</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Periodic external testing</td>
<td>Annually</td>
<td>Results in ELICOS provider’s academic board report</td>
<td>ELICOS provider</td>
</tr>
<tr>
<td>College A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tracer studies</td>
<td>Biennially</td>
<td>Results in academic board reports: RI &amp; ELICOS college</td>
<td>Receiving institution</td>
</tr>
<tr>
<td>College A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benchmarking with different colleges</td>
<td>Biannually</td>
<td>Onus on each ELICOS college</td>
<td>Staff resources shared</td>
</tr>
<tr>
<td>College B</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Connectivity
for continuous improvement

*Key to Best Practice in Direct Entry Programs*

To ensure:

- **Sustainability**
- **High standard of quality**
- **Successful Students**
- **Successful industry**