Prepared for success
- ELICOS

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La Trobe Melbourne

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

Sourced from the Austrade international Student data.
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.
- 20th 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

Americas: 14% 2015, 13% 2014

Sub-Saharan Africa: 1% 2015, 1% 2014

Asia Pacific: 68% 2015, 66% 2014
Market performance – Asia Pacific

TOTAL NUMBER OF ENROLMENTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Enrolments</th>
<th>Change (2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>116,409</td>
<td>+8%</td>
</tr>
<tr>
<td>2014</td>
<td>108,273</td>
<td>+8,136</td>
</tr>
</tbody>
</table>

THESE WERE ALSO THE THREE KEY COUNTRIES:

- **Japan**: +1,363
- **China**: +6,166
- **South Korea**: +2,209
Market performance – the Americas

TOTAL NUMBER OF ENROLMENTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>% Change</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% of enrolments

Colombia

34% of enrolments
Market performance - Europe

TOTAL NUMBER OF ENROLMENTS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>26,081</td>
<td>-4,226</td>
</tr>
<tr>
<td>2015</td>
<td>21,855</td>
<td>-16%</td>
</tr>
</tbody>
</table>

ENROLMENT DROPS

- ITALY: -42%
- Germany: -24%
- Switzerland: -7%

ITALY IS THE KEY COUNTRY BUT DECLINED IN STUDENT ENROLMENTS IN 2015.

Europe declined to 3rd ranked ELICOS region.
Market performance - 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%
- Iraq: -38%
- Turkey: -22%
- Kuwait: -42%
- Egypt: -30%
- Lebanon: -17%

Total number of enrolments:

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Enrolments</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>7,051</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>7,105</td>
<td>+1%</td>
</tr>
</tbody>
</table>
Top 10 Source Countries in 2015 - ELICOS
Top 5 Nationalities with Enrolment Increases

**FIVE LARGEST INCREASES 2014-2015**

- **China**: 35,528 (2015) - 29,362 (2014) | Change: 21% (6,166)
- **South Korea**: 16,266 (2015) - 14,057 (2014) | Change: 16% (2,209)
- **Brazil**: 12,641 (2015) - 10,259 (2014) | Change: 23% (2,382)
- **Japan**: 19,809 (2015) - 18,446 (2014) | Change: 7% (1,363)
- **Taiwan**: 8,291 (2015) - 7,435 (2014) | Change: 12% (856)

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

FIVE LARGEST DECREASES 2014-2015

THAILAND  
10,269 2015  
11,888 2014  
\(-14\%\)  
\(-1,619\)  

VIETNAM  
6,174 2015  
7,480 2014  
\(-17\%\)  
\(-1,306\)  

ITALY  
5,354 2015  
6,562 2014  
\(-18\%\)  
\(-1,208\)  

GERMANY  
1,469 2015  
2,546 2014  
\(-42\%\)  
\(-1,077\)  

INDIA  
6,509 2015  
7,503 2014  
\(-13\%\)  
\(-994\)  

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

Dept. Education and Training Pathway data (student visa)

- ELICOS only: 30.3%
- ELICOS Plus Pathway: 69.7%
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%
ELICOS Sector and pathway connections

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

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

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

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

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

- ELICOS - Higher Education: 48%
- VET - Higher Education: 9%
- Non-award - Higher Education: 7%
- Schools - Higher Education: 6%
- 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)
VET - Thailand and Brazil

Thailand

- ELICOS - VET: 86%
- VET only: 10%
- VET: 1%
- Higher Education - VET: 3%
- Non-award - VET: 0%

Brazil

- ELICOS - VET: 79.5%
- VET only: 19.5%
- VET: 0.3%
- Schools - VET: 0.3%
- Higher Education - VET: 0.3%
- Non-award - VET: 10%

Dept. Education and Training Pathway data (student visa)
Distribution of ELICOS Students Nationally

Department of Education and Training – visualisation tools
Where to connect in the future?

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?

<table>
<thead>
<tr>
<th>Country</th>
<th>Opportunity (m$)</th>
<th>Growth Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>7,200</td>
<td>1.9%</td>
</tr>
<tr>
<td>Thailand</td>
<td>4,400</td>
<td>3.0%</td>
</tr>
<tr>
<td>Brazil</td>
<td>4,200</td>
<td>2.8%</td>
</tr>
<tr>
<td>India</td>
<td>3,600</td>
<td>3.5%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3,600</td>
<td>3.1%</td>
</tr>
<tr>
<td>Japan</td>
<td>2,600</td>
<td>3.5%</td>
</tr>
<tr>
<td>Republic of Korea</td>
<td>2,500</td>
<td>2.9%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>1,800</td>
<td>3.1%</td>
</tr>
<tr>
<td>Italy</td>
<td>1,100</td>
<td>2.8%</td>
</tr>
<tr>
<td>Pakistan</td>
<td>900</td>
<td>4.4%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>800</td>
<td>3.9%</td>
</tr>
</tbody>
</table>
‘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’

‘s0 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>
</tr>
<tr>
<td>Tracer studies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benchmarking with different colleges</td>
<td></td>
<td></td>
<td></td>
</tr>
</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>
<td></td>
</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