AIEC 2016

Prepared for success - ELICOS

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La Trobe Melbourne

20 October 2016

ENGLISH AUSTRALIA

QUALITY | SUPPORT | ASSURANCE

A connected sector – Student visa (all sectors)

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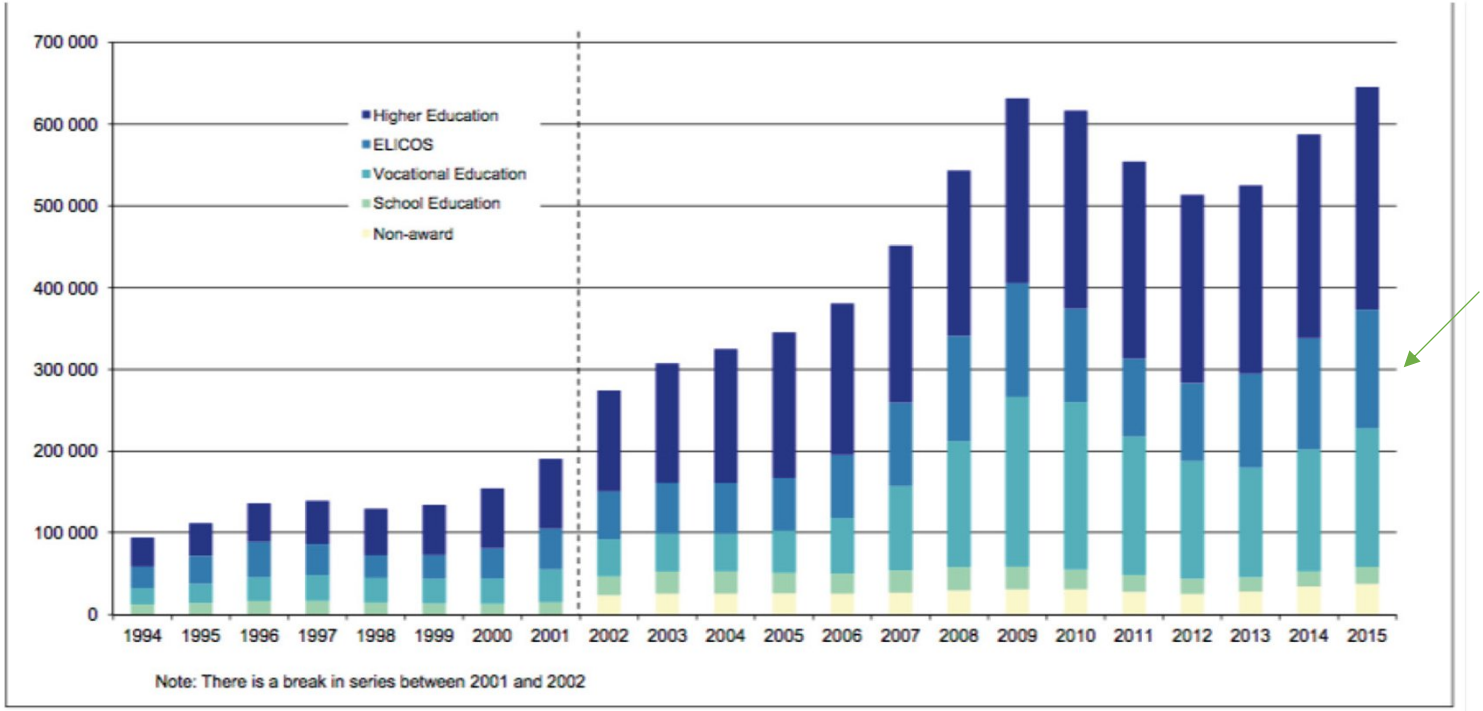
Australian Government
Department of Education and Training



ELICOS
145,298

Sourced from the Austrade international Student data.

International Student Data 2015 (ELICOS)

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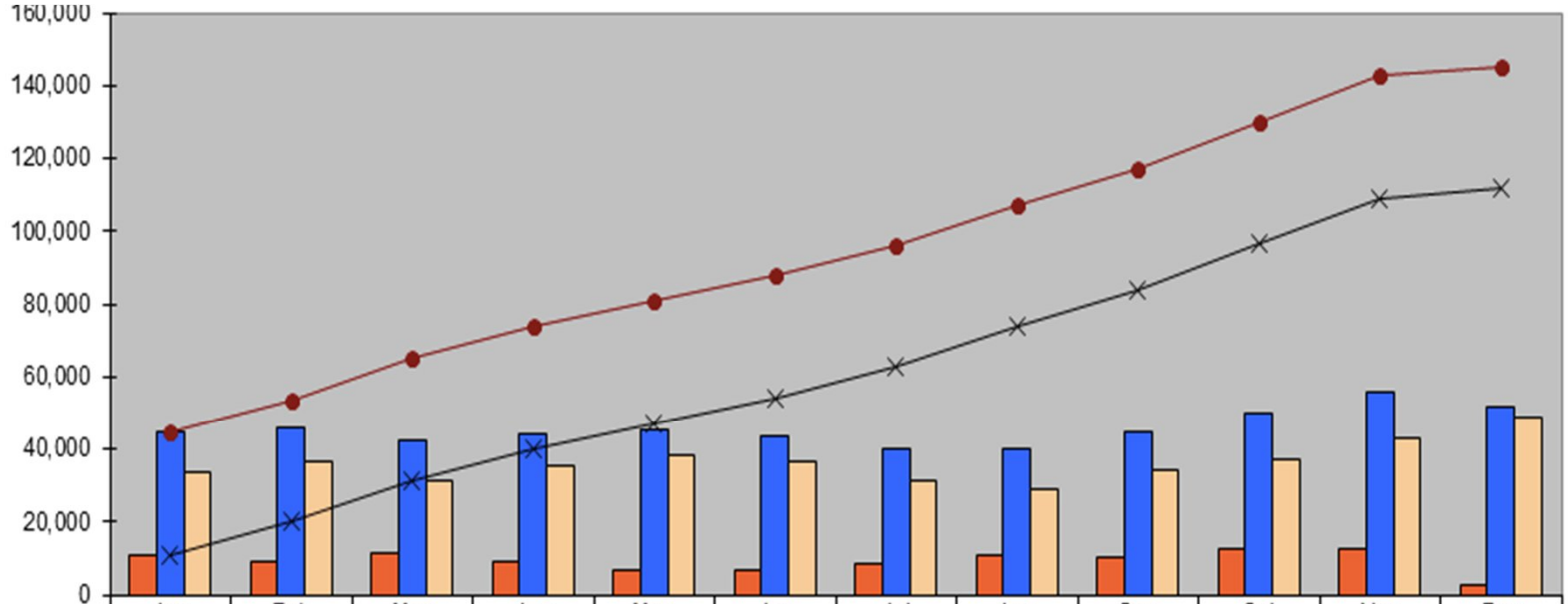
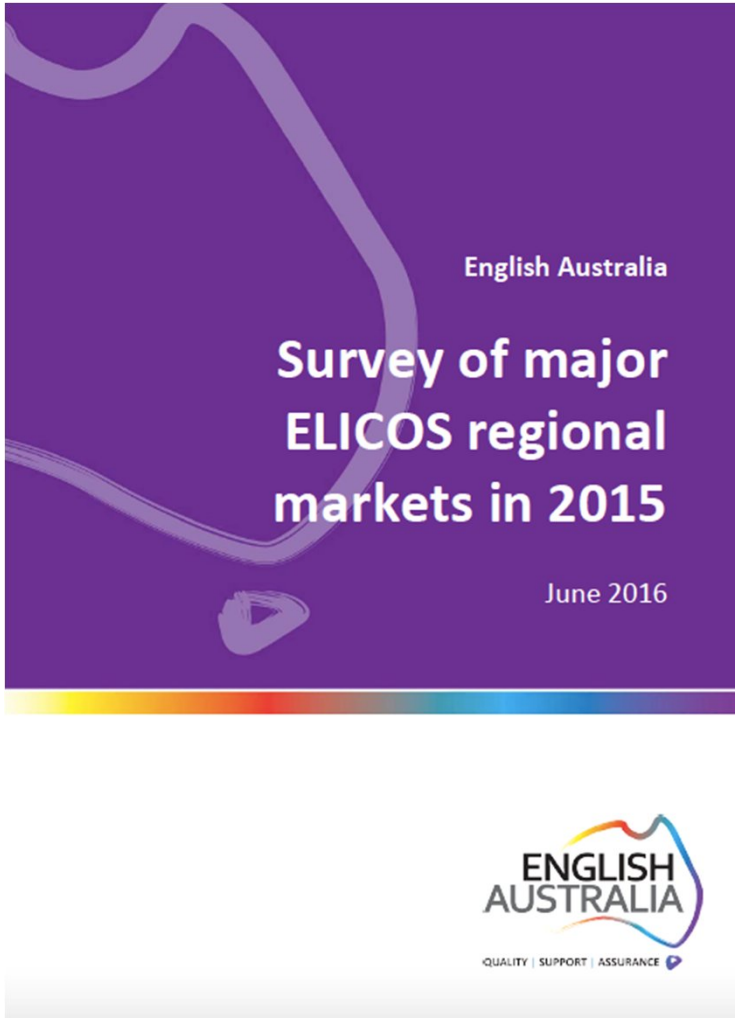
MONTHLY TIME SERIES OF STOCK, FLOW AND YEAR TO DATE OF STUDENT ENROLMENTS - ELICOS



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Commencements	10,920	9,089	11,335	8,843	6,960	6,979	8,405	11,066	10,166	12,600	12,742	2,602
Total in month	44,511	45,825	42,397	44,155	45,492	43,539	39,720	40,115	44,615	49,897	55,544	51,534
Start of month	33,591	36,736	31,062	35,312	38,532	36,560	31,315	29,049	34,449	37,297	42,802	48,932
Year to date Commencements	10,920	20,009	31,344	40,187	47,147	54,126	62,531	73,597	83,763	96,363	109,105	111,707
Year to date Enrolments	44,511	53,600	64,935	73,778	80,738	87,717	96,122	107,188	117,354	129,954	142,696	145,298

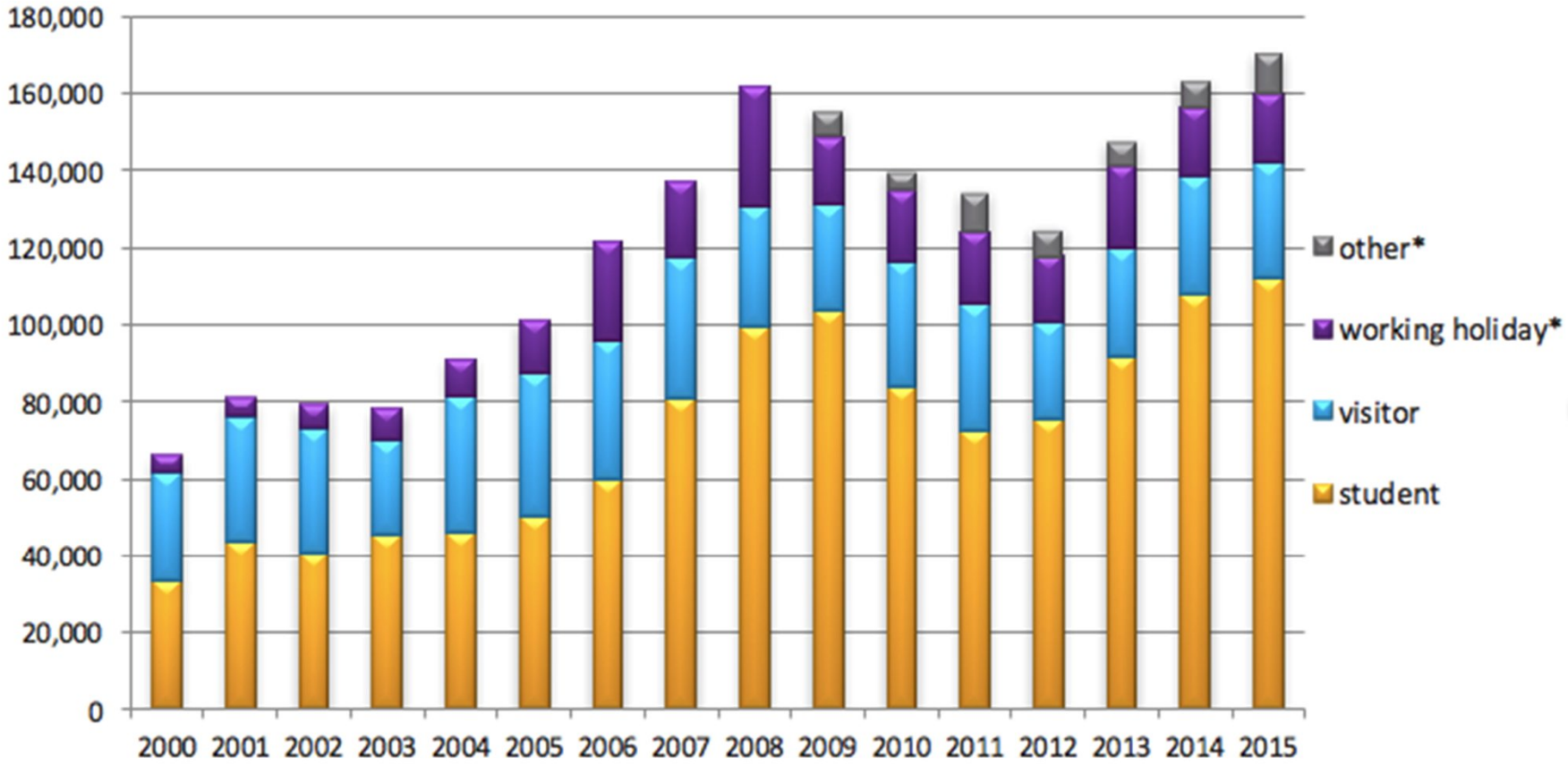
Sourced from the Austrade international Student data.

The complete picture for ELICOS



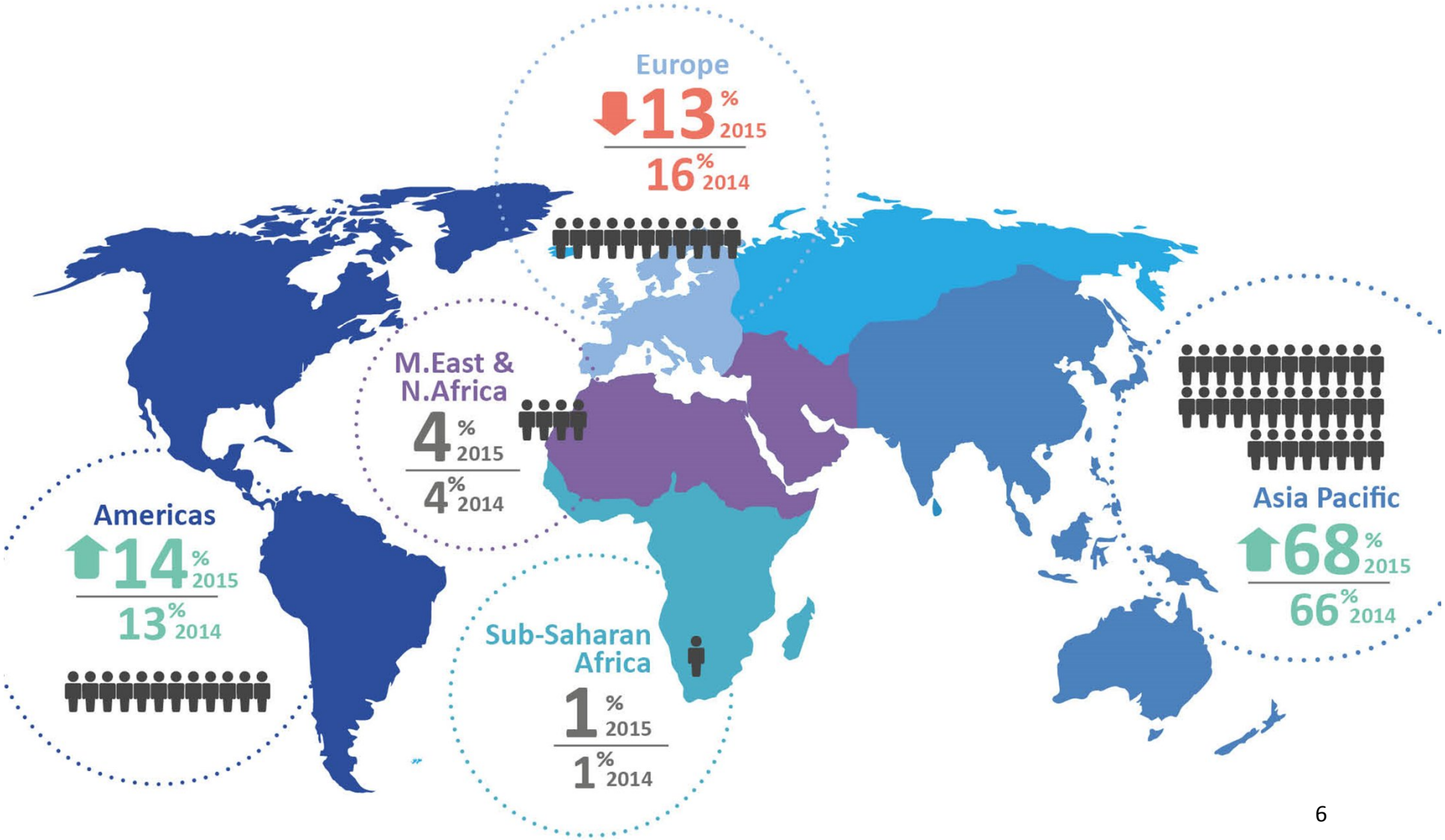
- Department of Education and Training funded sector wide survey.
- 20th Year of publication.
- Excellent sector wide participation.
- English Australia member colleges accounted for 86% of total enrolments in 2015.

Importance of the combined visa programs

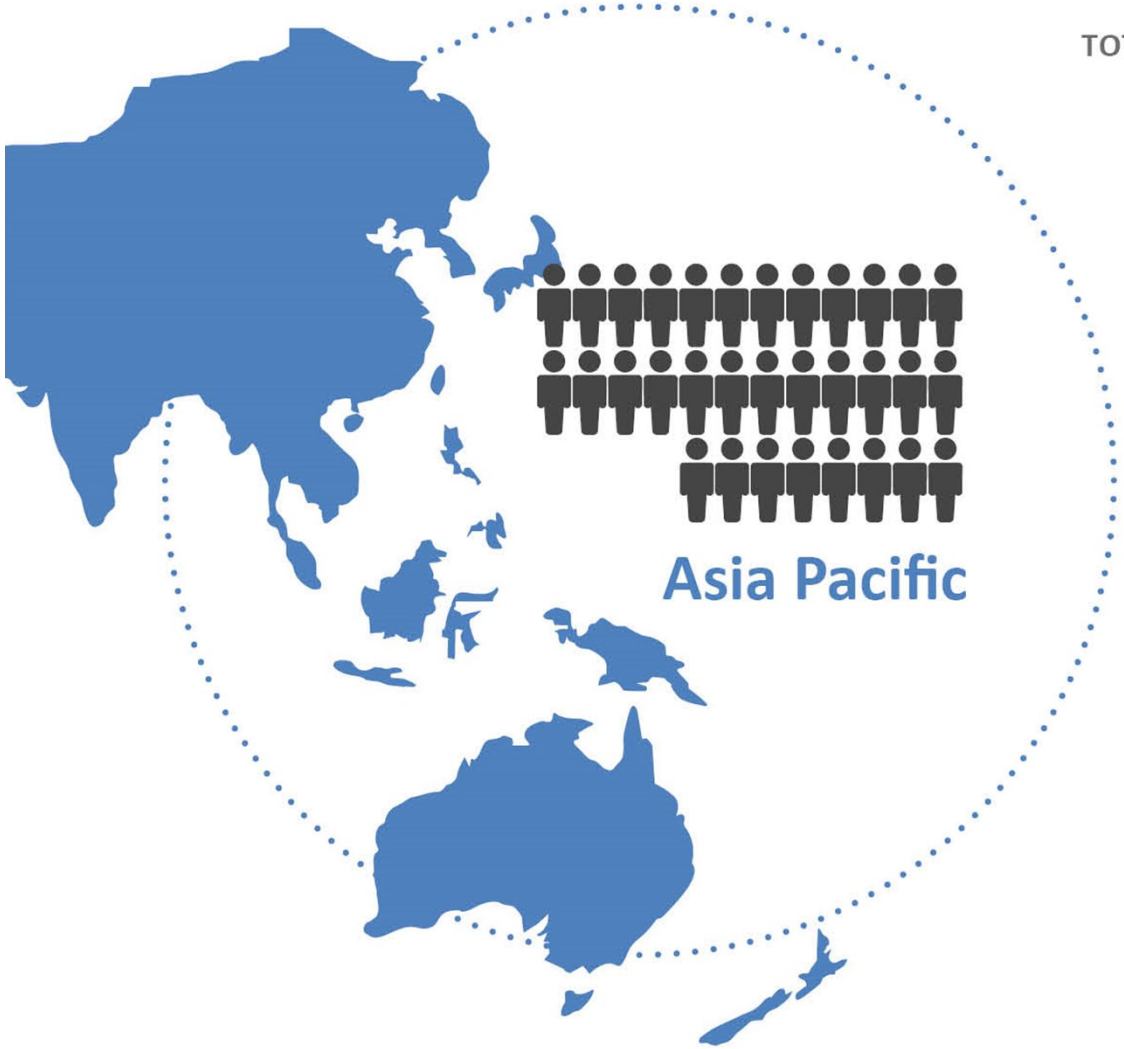


** prior to 2009, working holiday & other visas were combined together*

Connecting with students globally



Market performance – Asia Pacific



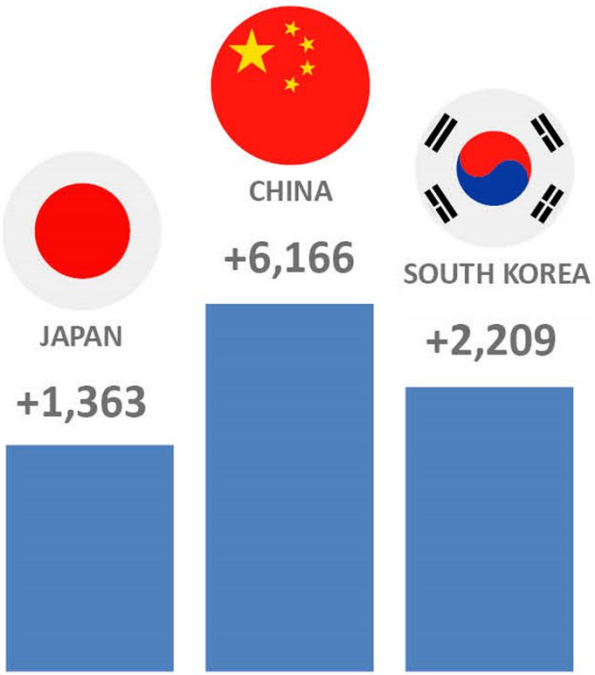
TOTAL NUMBER OF ENROLMENTS

116,409 2015

108,273 2014

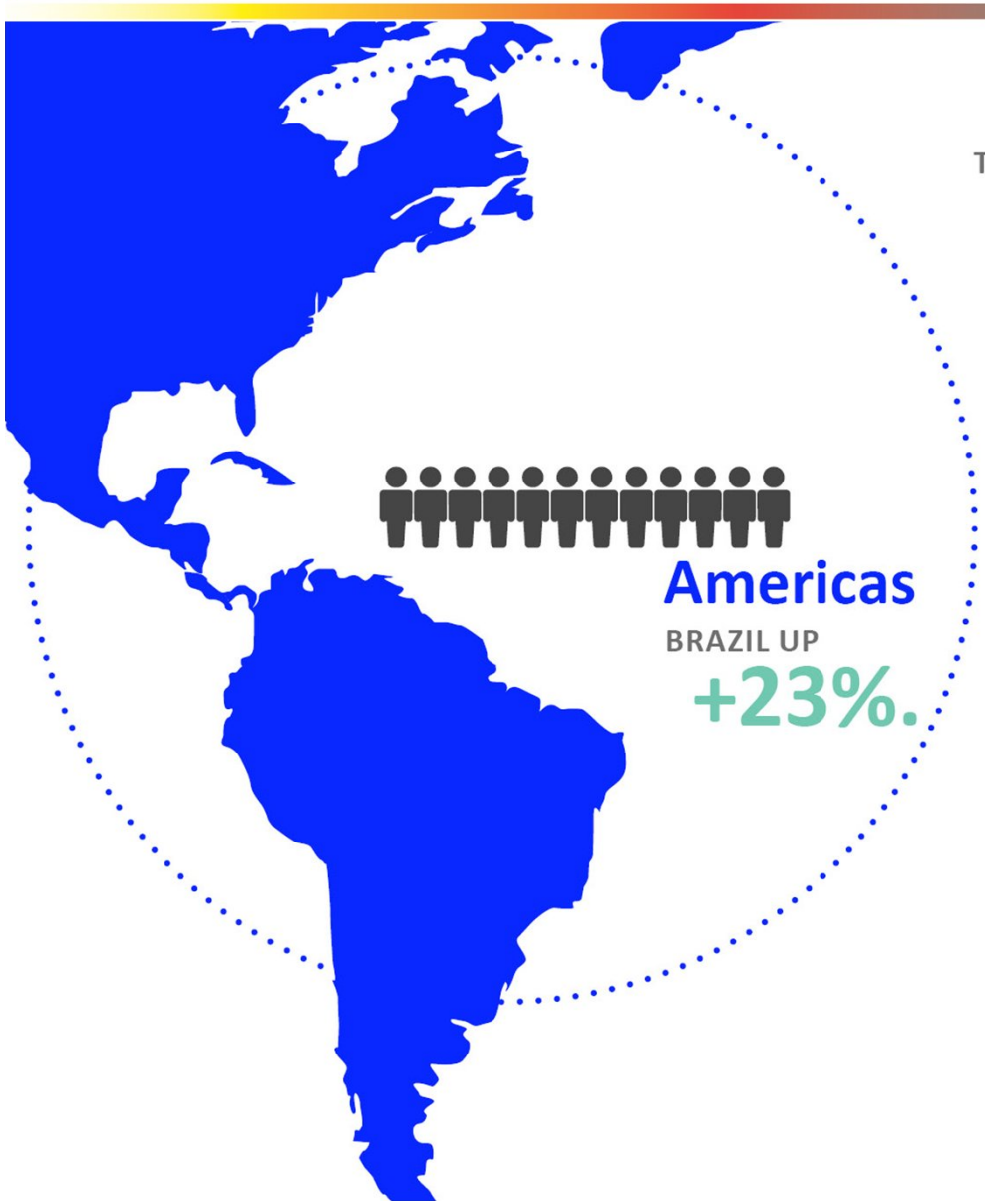
8%

+8,136



THESE WERE ALSO THE THREE KEY COUNTRIES.

Market performance – the Americas



TOTAL NUMBER OF ENROLMENTS

24,603 2015 ↑15%

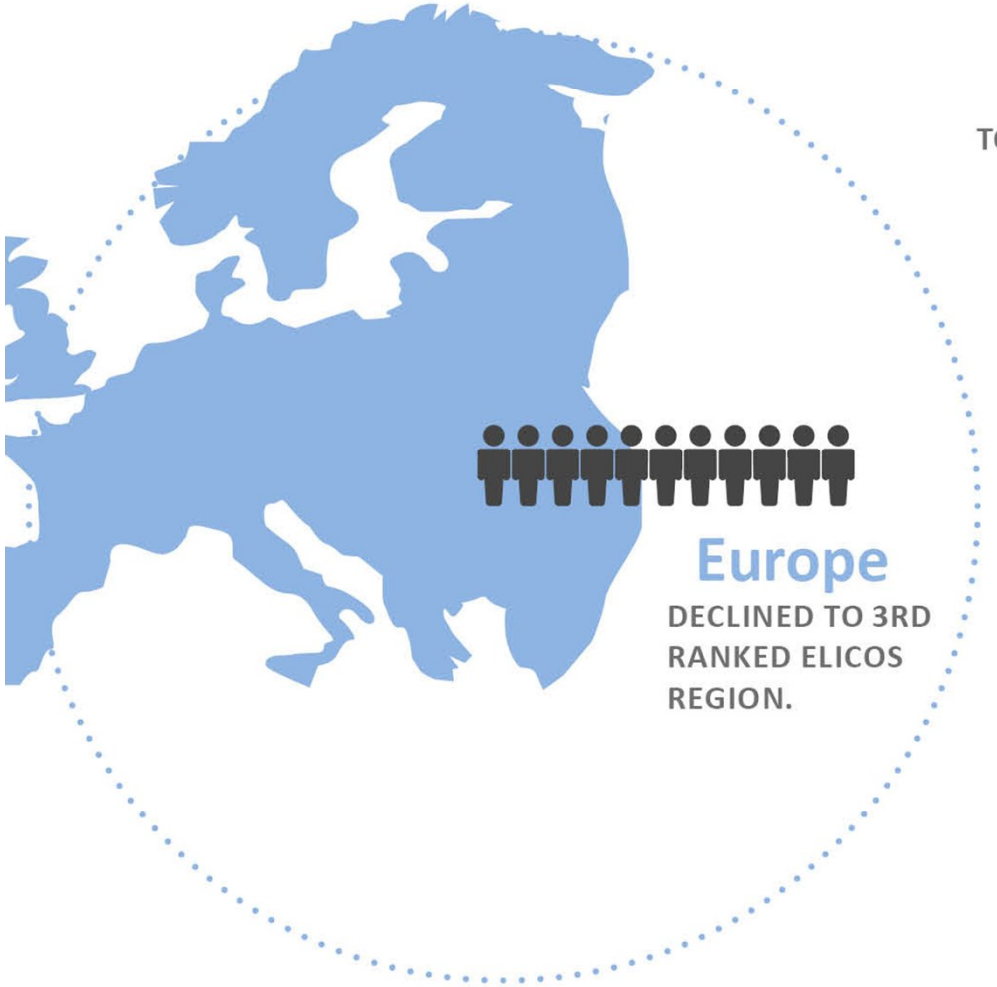
21,408 2014 +3,195

BRAZIL 51%

Colombia 34%

OF ENROLMENTS

Market performance - Europe



TOTAL NUMBER OF ENROLMENTS

21,855 2015 ⬇16%

26,081 2014 -4,226

ITALY

5,345

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

⬇18%

ENROLMENT DROPS

⬇42%

⬇24%

⬇7%

Market performance - Middle East and North Africa

TOTAL NUMBER OF ENROLMENTS

7,105 2015

7,051 2014

↑1%

OMAN ↑24%

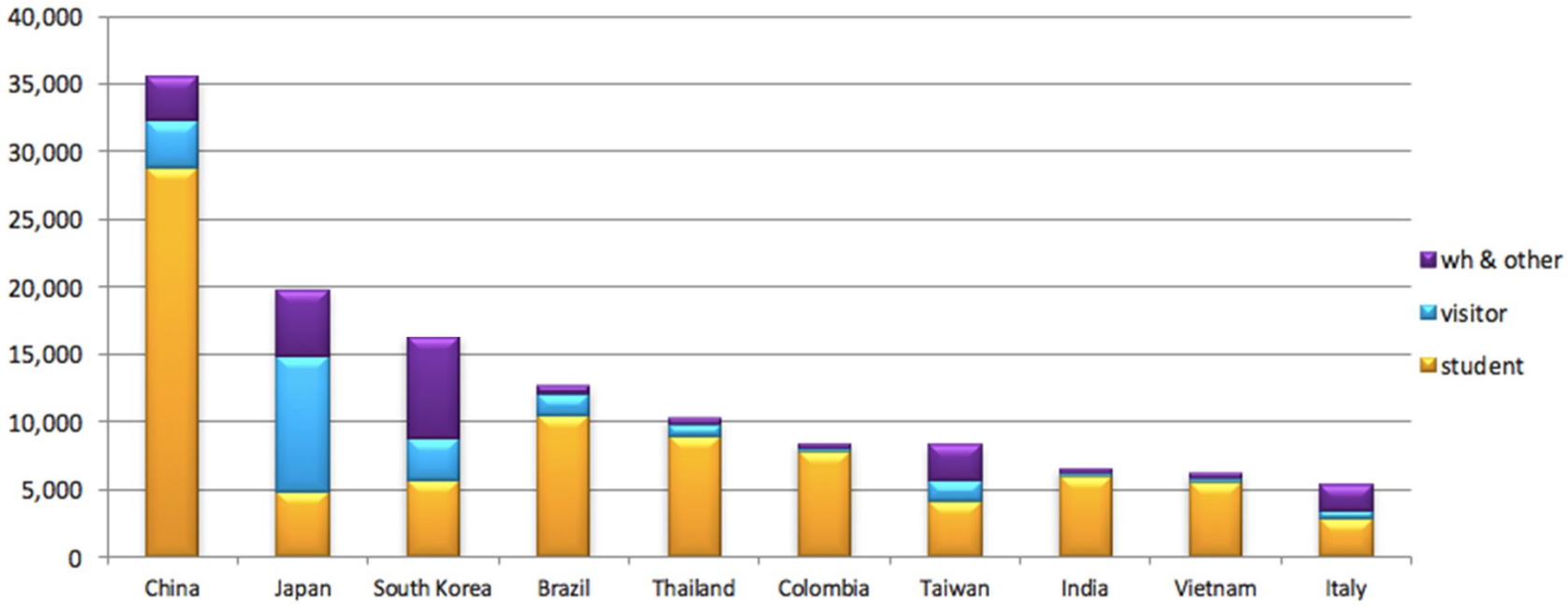
UAE ↑23%

SAUDI ARABIA ↑8%

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

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ELICOS STUDENTS

76%
2015

CHINA
JAPAN
SOUTH KOREA
BRAZIL
THAILAND
COLUMBIA
TAIWAN
INDIA
VIETNAM
ITALY

↑ 2% 2015
2010

43%
2015

CHINA
SOUTH KOREA
JAPAN

21%

CHINA

↑ 3%

Top 5 Nationalities with Enrolment Increases

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FIVE LARGEST INCREASES 2014-2015

CHINA

35,528 2015
29,362 2014
21% +6,166
CHANGE %

SOUTH KOREA

16,266 2015
14,057 2014
16% +2,209
CHANGE %

BRAZIL

12,641 2015
10,259 2014
23% +2,382
CHANGE %

JAPAN

19,809 2015
18,446 2014
7% +1,363
CHANGE %

TAIWAN

8,291 2015
7,435 2014
12% +856
CHANGE %

Note: All in top 10 countries.

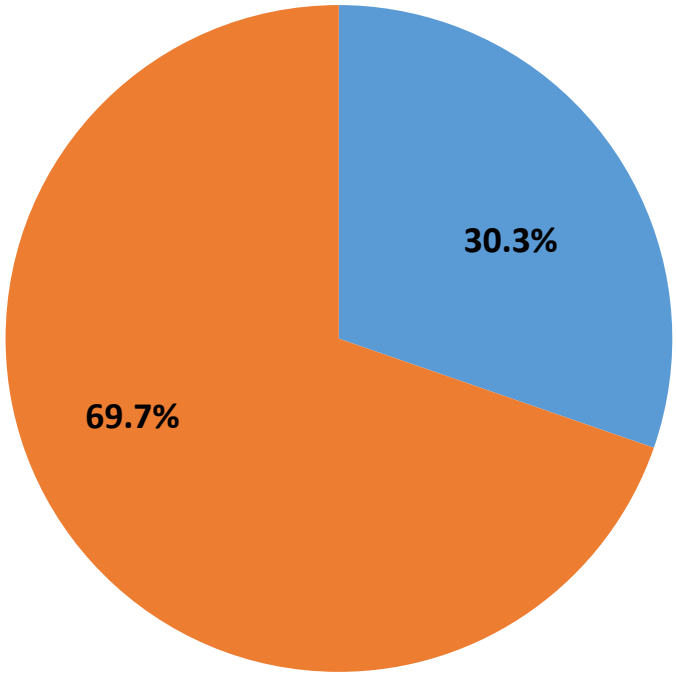
Top 5 Nationalities with Enrolment Decreases

FIVE LARGEST DECREASES 2014-2015

THAILAND	VIETNAM	ITALY	GERMANY	INDIA
10,269 2015	6,174 2015	5,354 2015	1,469 2015	6,509 2015
11,888 2014	7,480 2014	6,562 2014	2,546 2014	7,503 2014
14% -1,619 CHANGE %	17% -1,306 CHANGE %	18% -1,208 CHANGE %	42% -1,077 CHANGE %	13% -994 CHANGE %

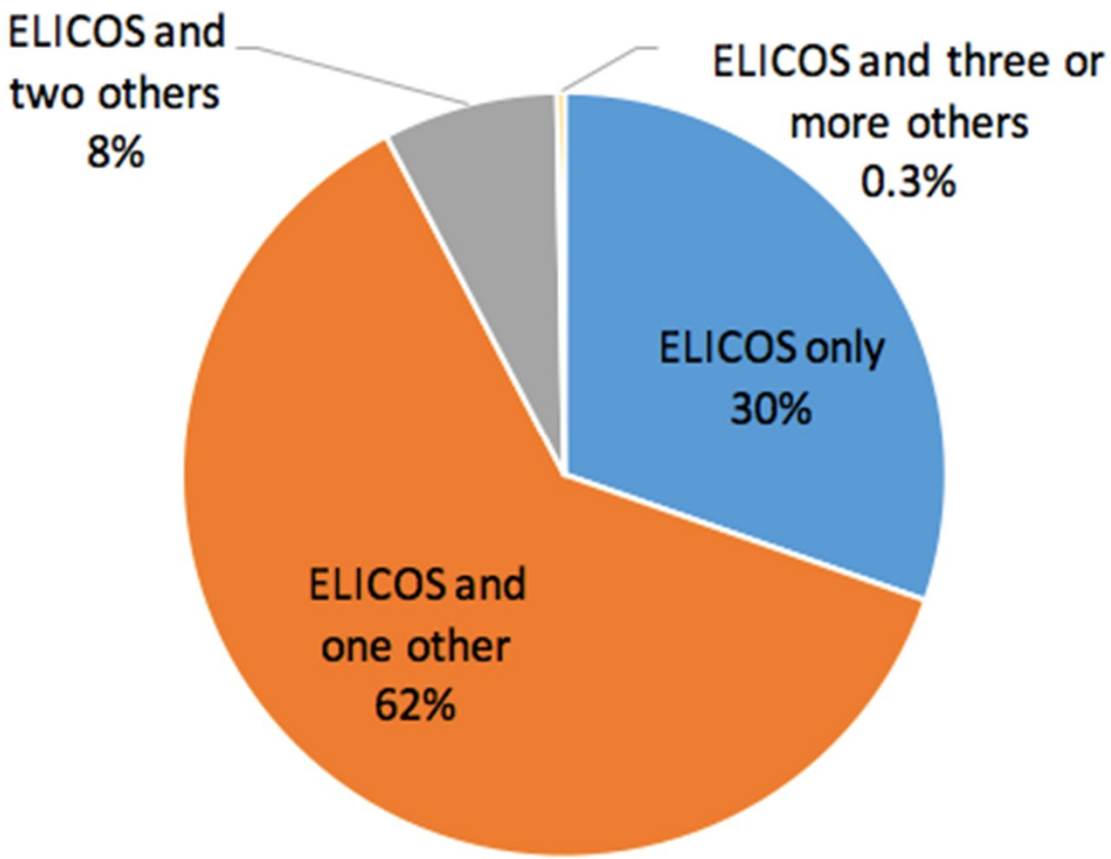
Note: Four of these are in top 10 countries (not Germany).

ELICOS students on a journey



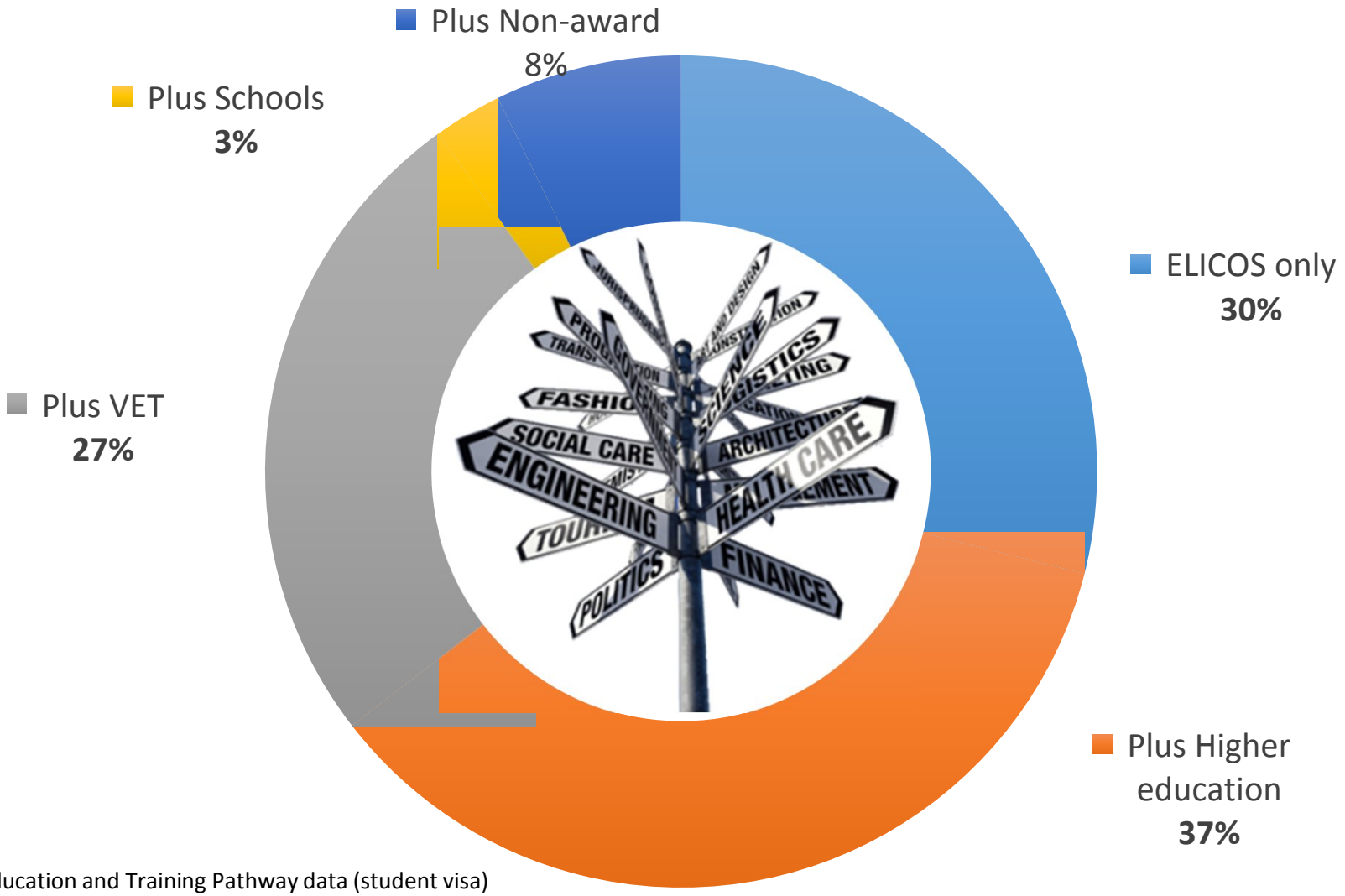
Dept. Education and Training Pathway data (student visa)

Students in ELICOS: Number of sectors recorded (2014 ELICOS cohort)



Dept. Education and Training Pathway data (student visa)

ELICOS Sector and pathway connections



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

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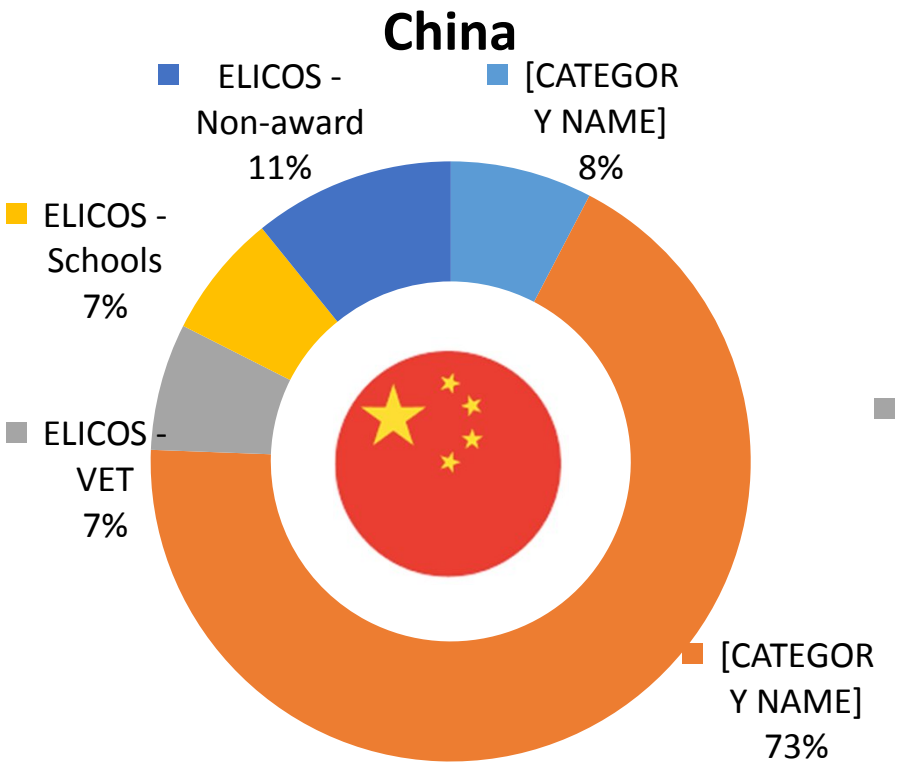
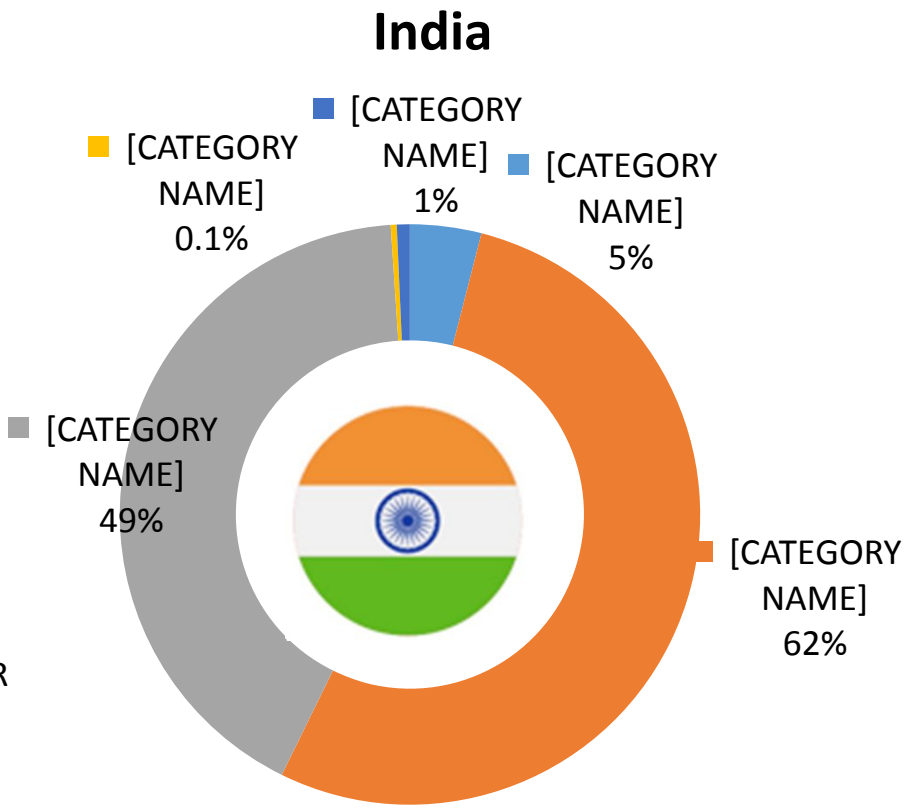
Top 10 nationalities and their direct and indirect inter-sector study pathways from ELICOS (2014 ELICOS cohort)

	Inter-sector pathway						Total
Nationality	ELICOS only	ELICOS - Higher education	ELICOS - VET	ELICOS - Schools	ELICOS - Non-award		
	Proportion of total for each nationality						Students
China	8.3%	73.3%	7.4%	7.2%	11.7%		18,165
Brazil	39.4%	1.4%	25.5%	0.1%	33.8%		6,355
India	4.6%	62.2%	48.6%	0.4%	0.9%		5,519
Thailand	45.8%	7.4%	46.6%	0.8%	0.3%		4,977
Vietnam	27.8%	40.8%	33.6%	3.2%	4.2%		4,719
Korea, Republic of (South)	37.5%	13.3%	44.6%	2.3%	1.5%		3,424
Colombia	73.1%	5.5%	21.4%	4.0%	0.5%		3,189
Japan	65.6%	6.3%	17.8%	1.5%	5.6%		2,999
Saudi Arabia	44.4%	41.1%	10.0%	0.1%	7.5%		1,819
Taiwan	45.1%	15.9%	33.9%	0.1%	1.8%		1,607
Legend (% of total):	40% to <50%	50% to 70%	>70%				

Dept. Education and Training Pathway data (student visa)

ELICOS students from India and China

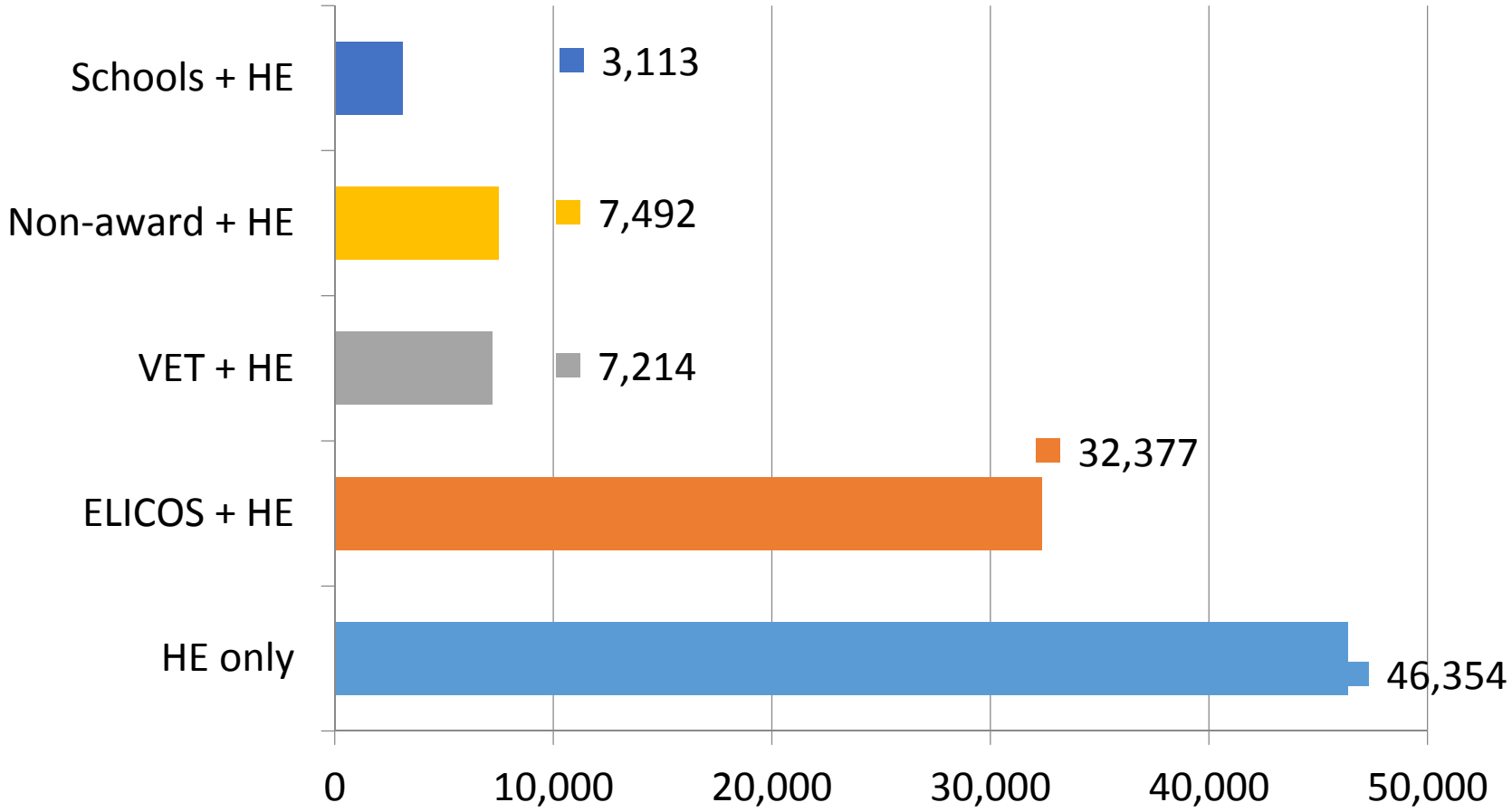




Dept. Education and Training Pathway data (student visa)

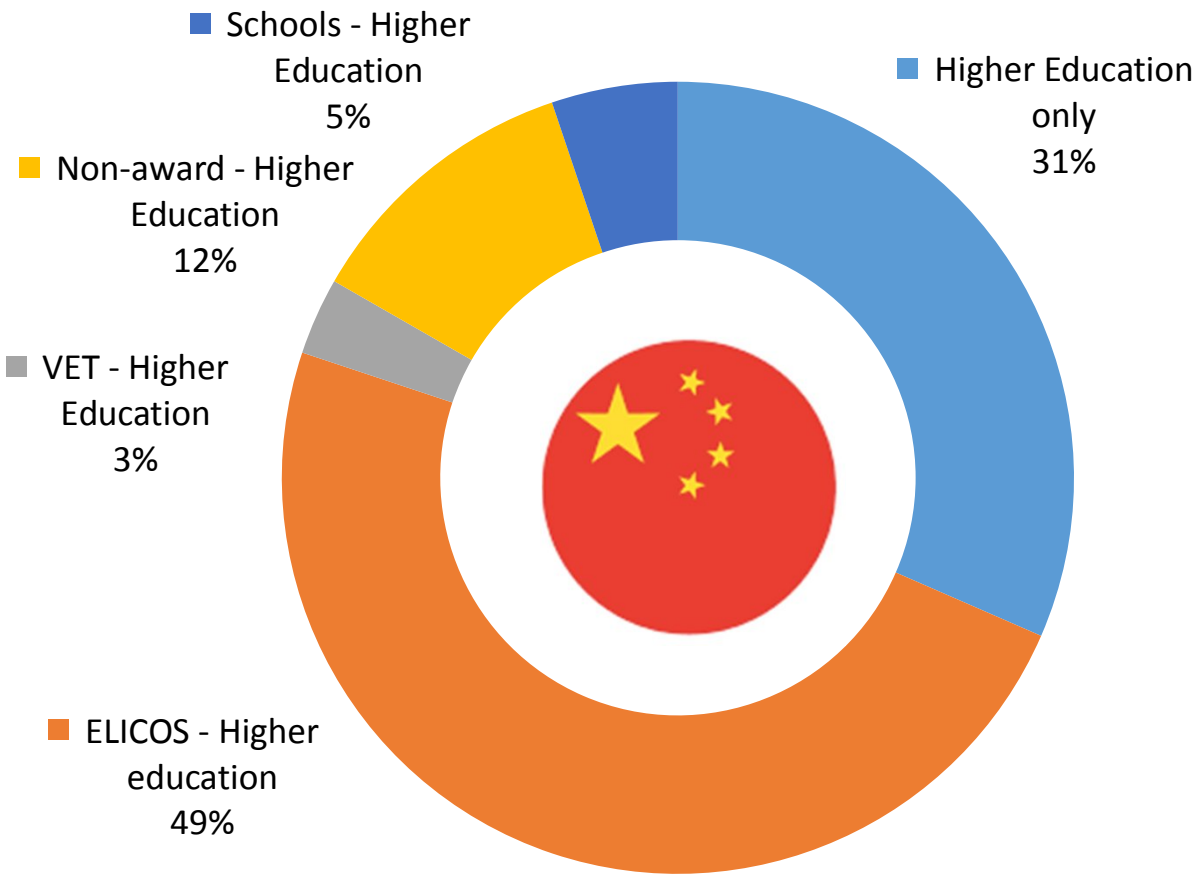
Note: total % is above 100 as some students enrol in multiple sectors in one year.

Higher Education Sector



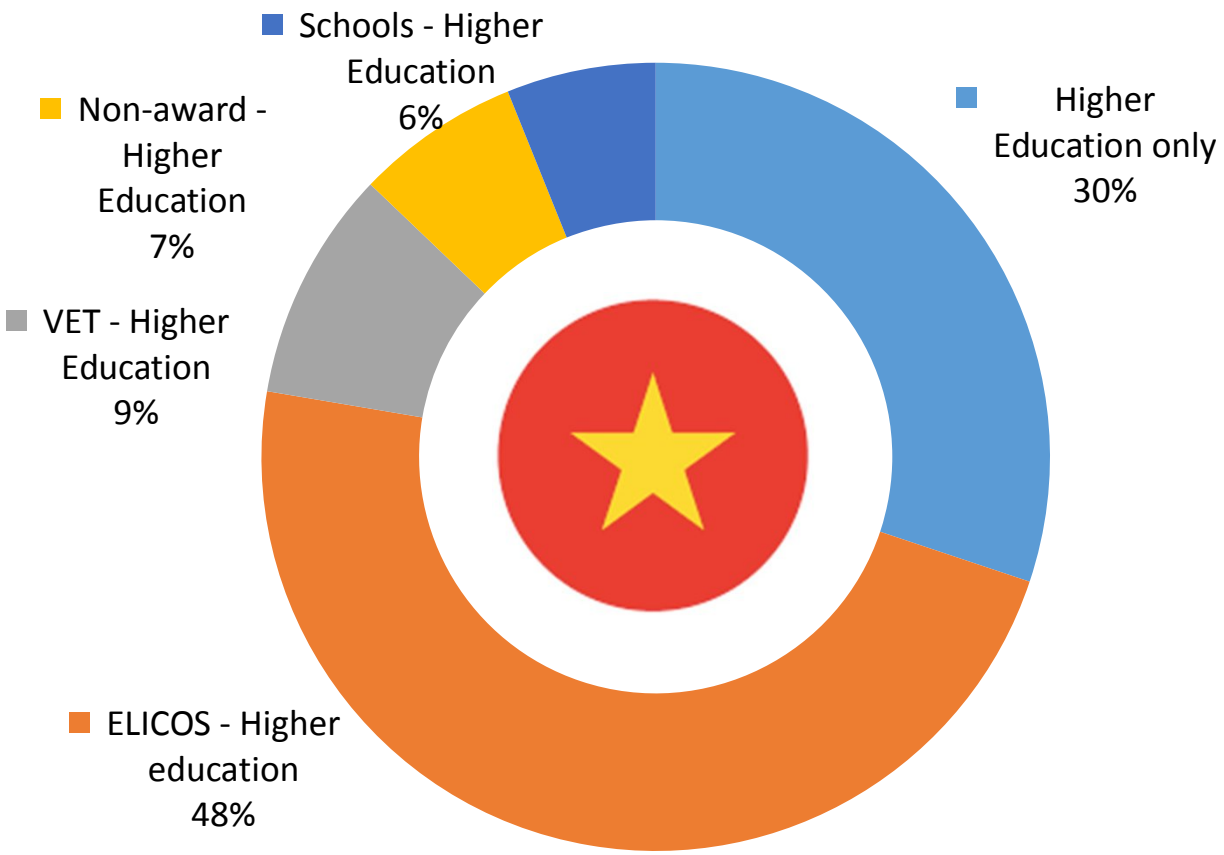
Dept. Education and Training Pathway data (student visa)

Higher Education - China



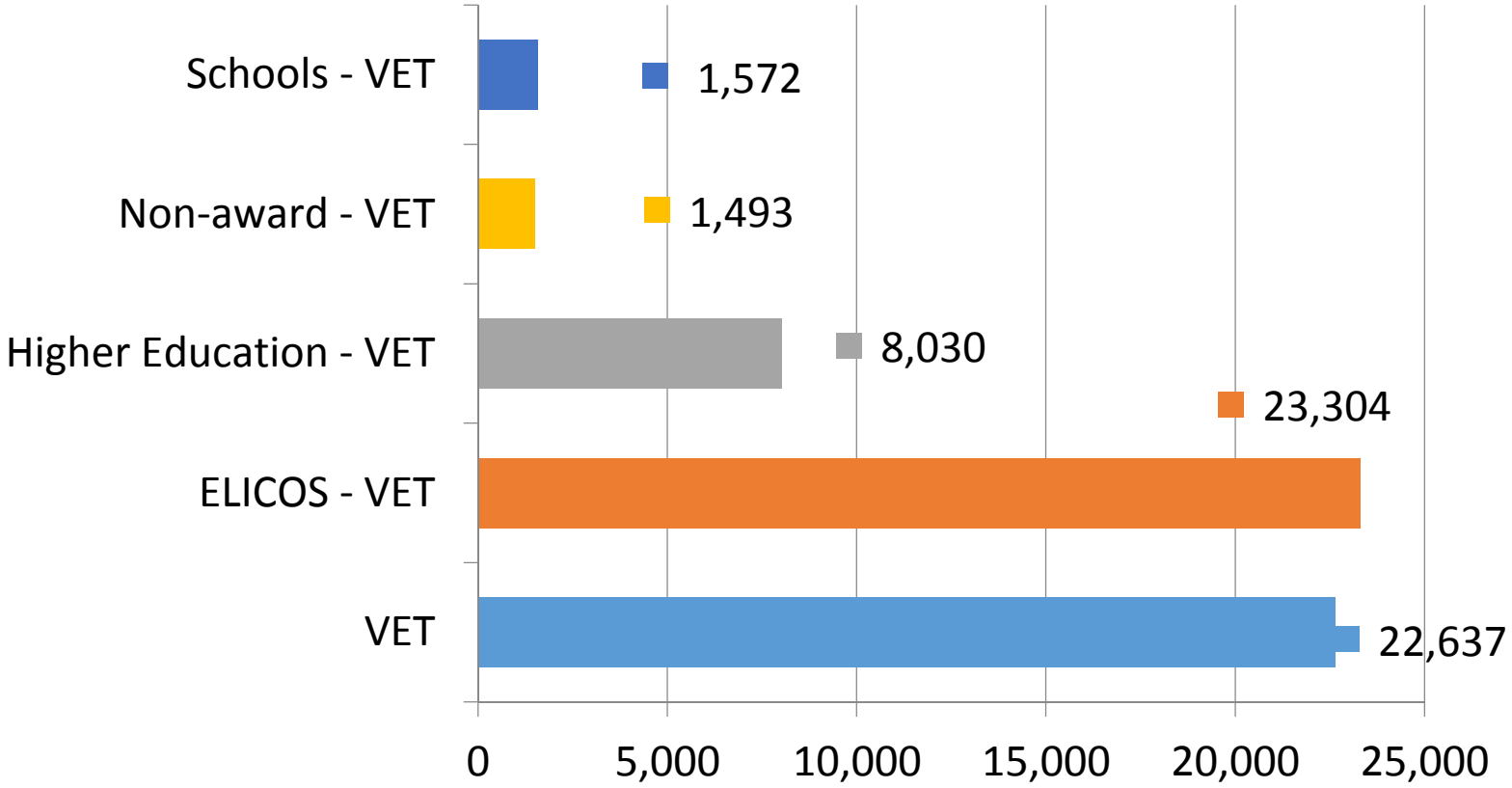
Dept. Education and Training Pathway data (student visa)

Higher Education - Vietnam



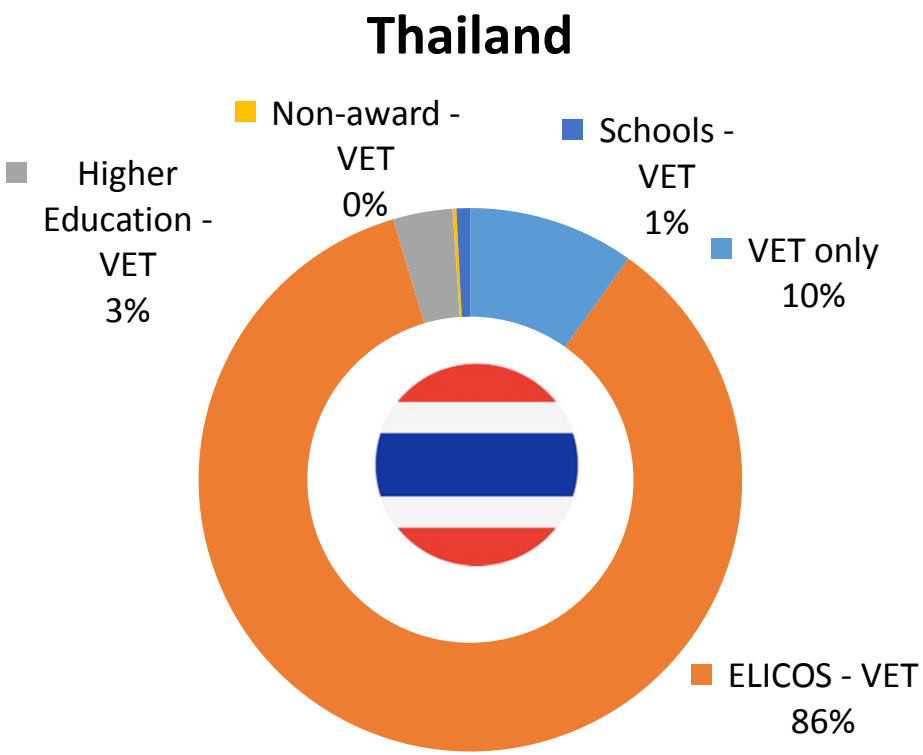
Dept. Education and Training Pathway data (student visa)

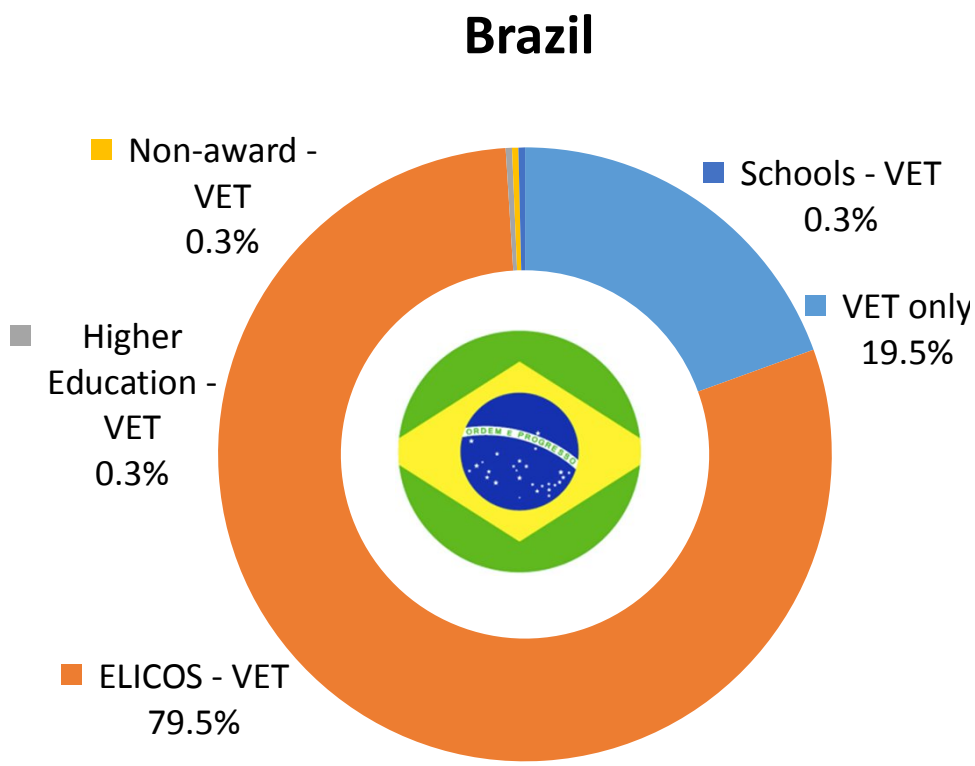
Vocational Education and Training Sector



Dept. Education and Training Pathway data (student visa)

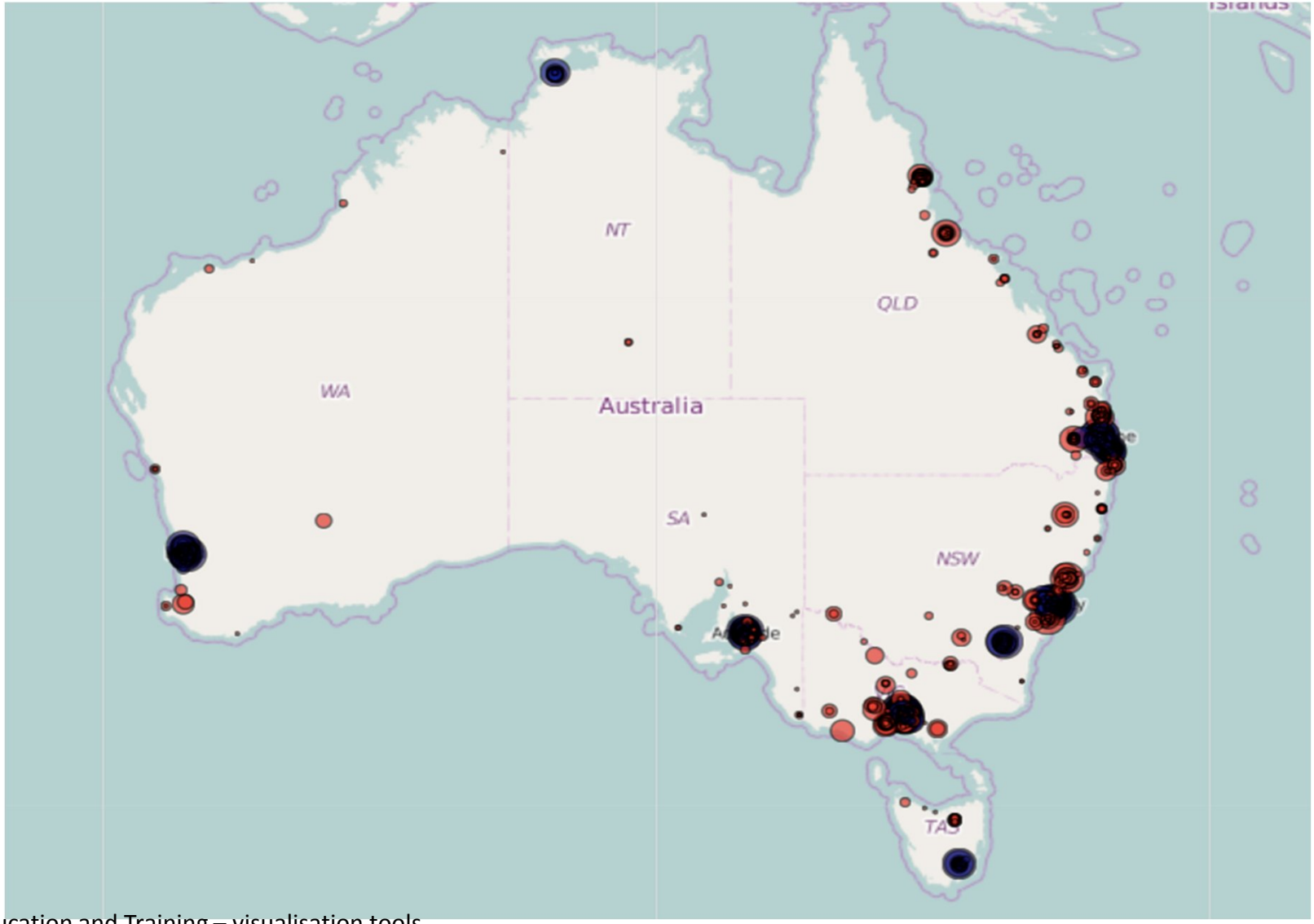
VET - Thailand and Brazil





Dept. Education and Training Pathway data (student visa)

Distribution of ELICOS Students Nationally



Dept. Education and Training – visualisation tools

Where to connect in the future?

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Deloitte Access Economics

Growth and opportunity in Australian International Education

A report prepared for Austrade

December 2015

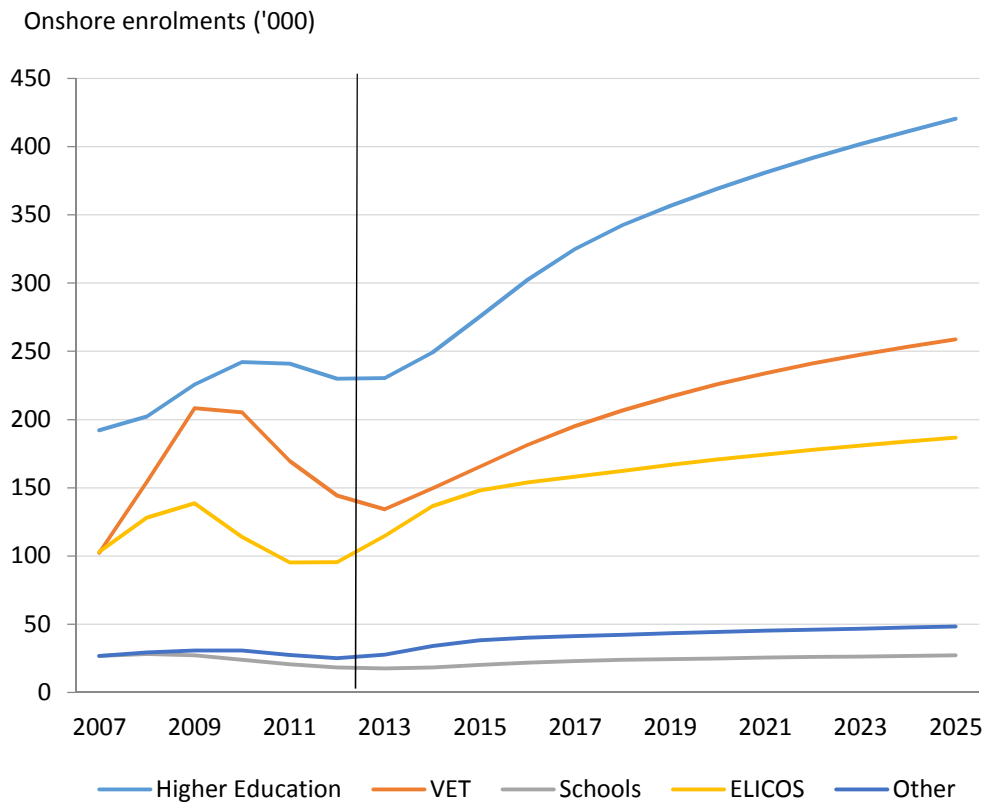
EduWorld

Deloitte.

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

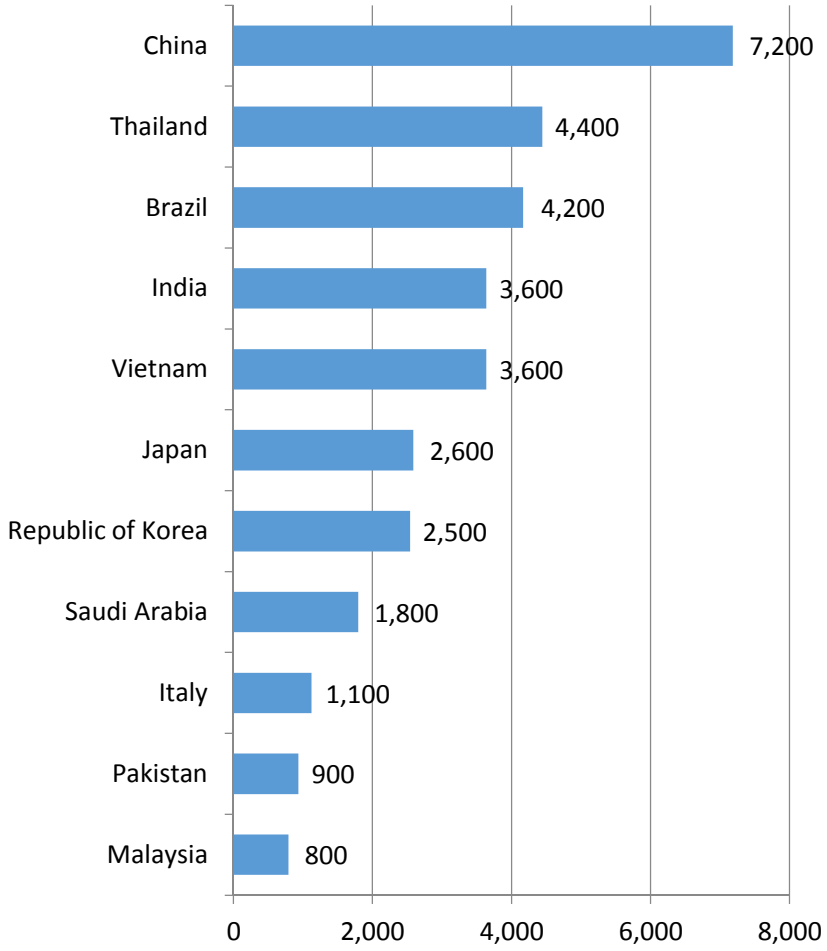
- Australia's onshore enrolments international education are forecast to grow to **940,000 by 2025** (3.8% average annual growth)
  - This amounts to export earnings in excess of $33 billion – almost doubling today's levels

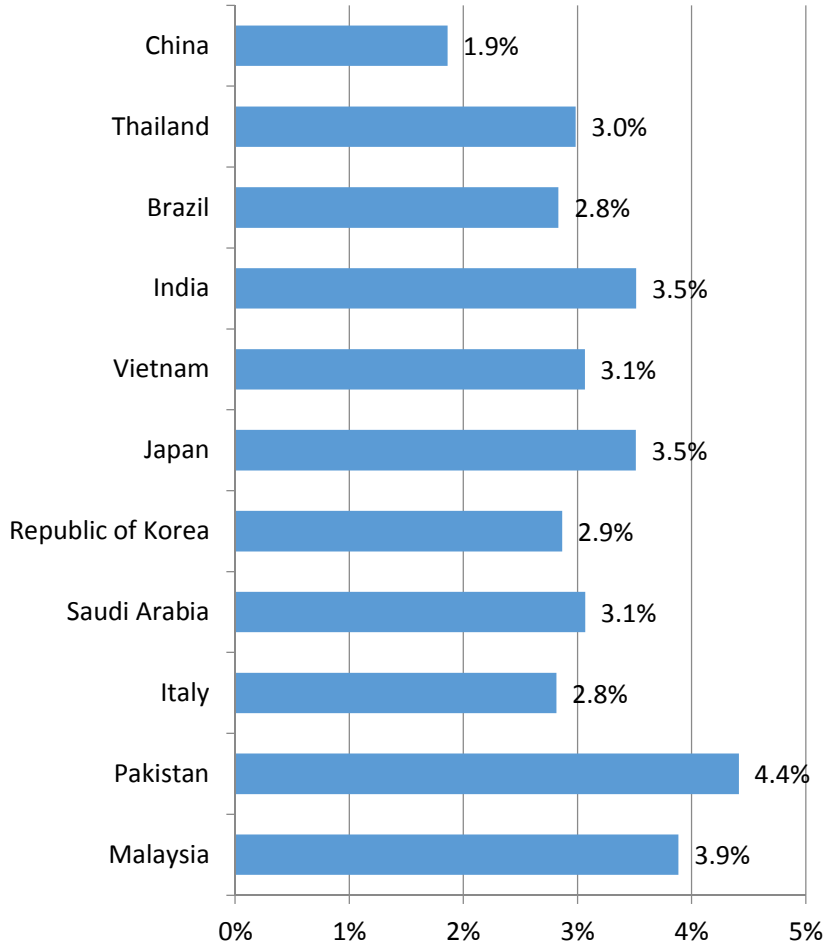


ELICOS Focus

- 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?





Prepared for Success – ELICOS

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Degrees of Deception,
Four Corners, ABC

'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

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Stakeholders

Parents/ Family

Receiving Institute

Home Country

International Student of the year 2014
Harriyadi Irawan

ELICOS Centre

Future Workplace

Australia

An industry wide approach

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*How can we, **as an industry,** help ensure international students are prepared for success in their further studies?*

Connectivity

ELICOS Success through ***connectivity****:*
Thinking together, working together *to*
support ***student readiness & success***

Industry Stakeholders

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TEQSA

English Australia

Department of Education & Training

IEAA

ACPET

NEAS

UECA

Department of Immigration & Border Protection

ASQA

Universities Australia

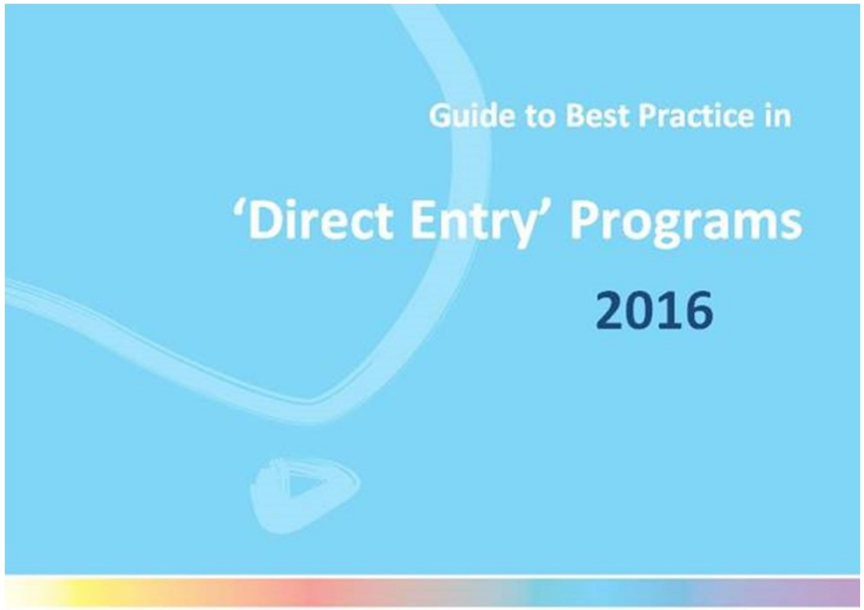
Best Practice across the sector

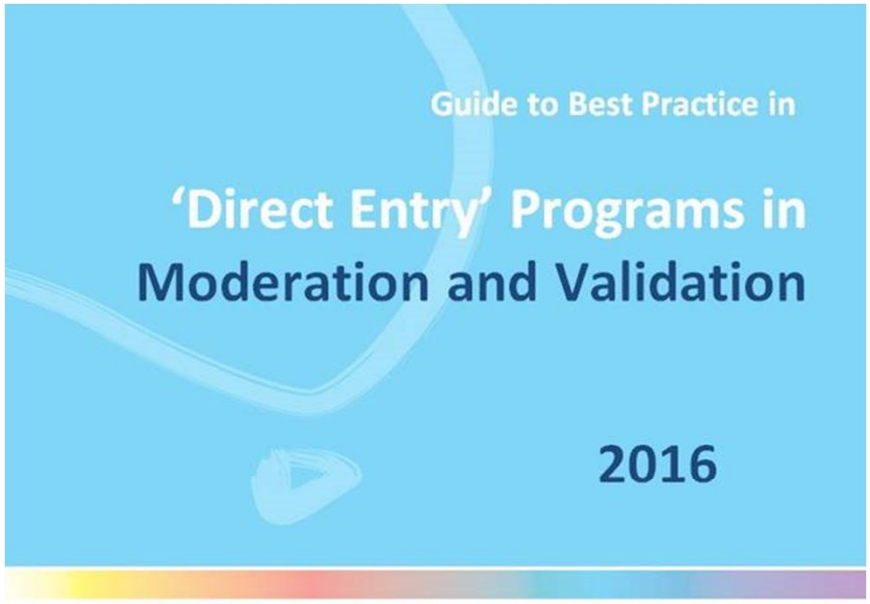
Some examples of:

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

- The role of **connectivity & partnerships** in producing **best practice**

English Australia
Guide to Best Practice in Direct Entry Programs in ELICOS





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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

Forms of outcomes benchmarking	Frequency	Accountability	Funding
Periodic external testing			
Tracer studies			
Benchmarking with different colleges			

External Validation: Outcomes Benchmarking
Best practice example

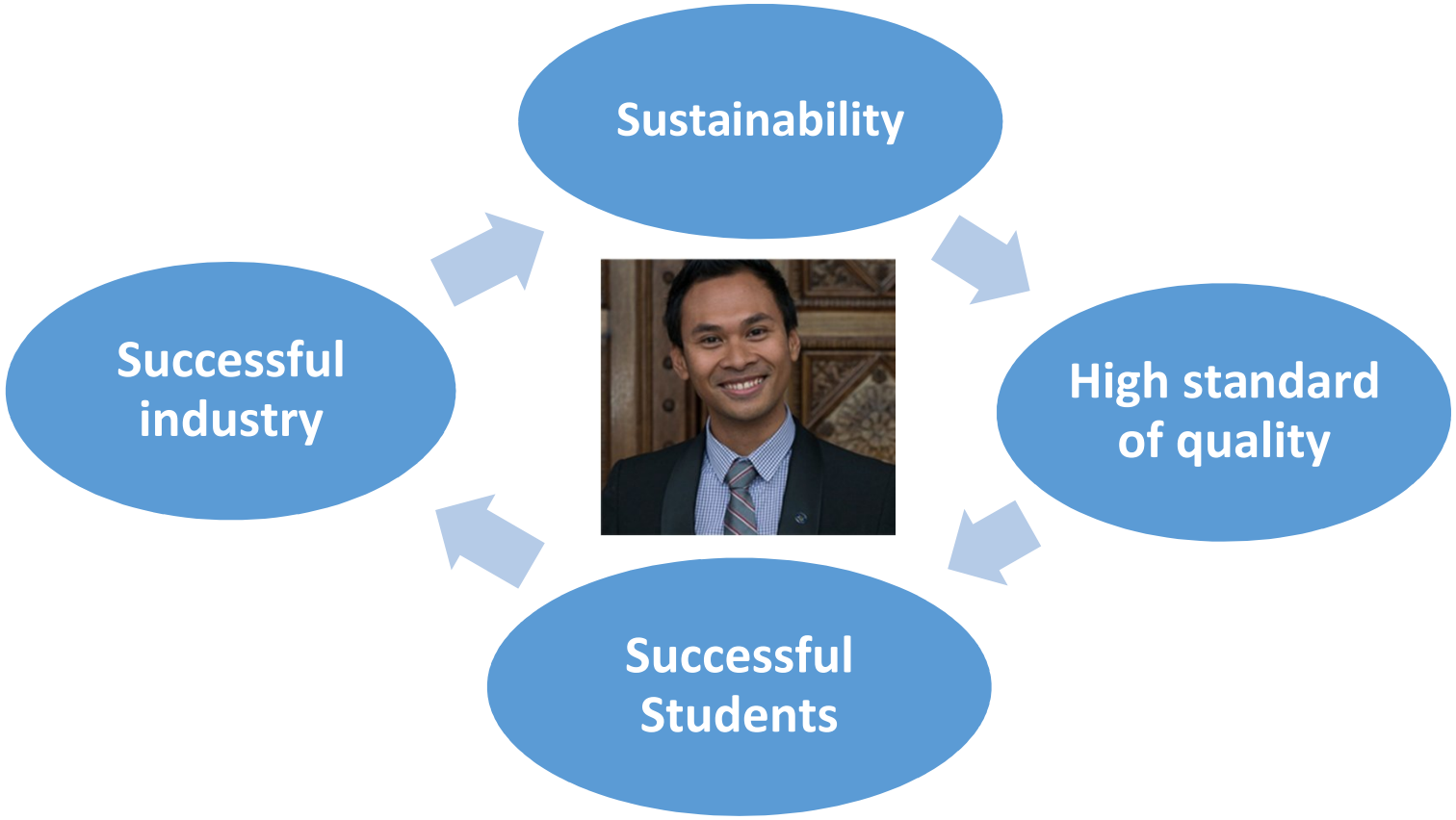
Forms of outcomes benchmarking	Frequency	Accountability	Funding
Periodic external testing **College A**	*Annually*	*Results in ELICOS provider's academic board report*	*ELICOS provider*
Tracer studies **College A**	*Biennially*	*Results in academic board reports: RI & ELICOS college*	*Receiving institution*
Benchmarking with different colleges **College B**	*Biannually*	*Onus on each ELICOS college*	*Staff resources shared*

Connectivity

for continuous improvement

Key to Best Practice in Direct Entry Programs

To ensure:



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