Achieve diversity in your student mix through ELICOS

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CEO, English Australia
12 October 2017

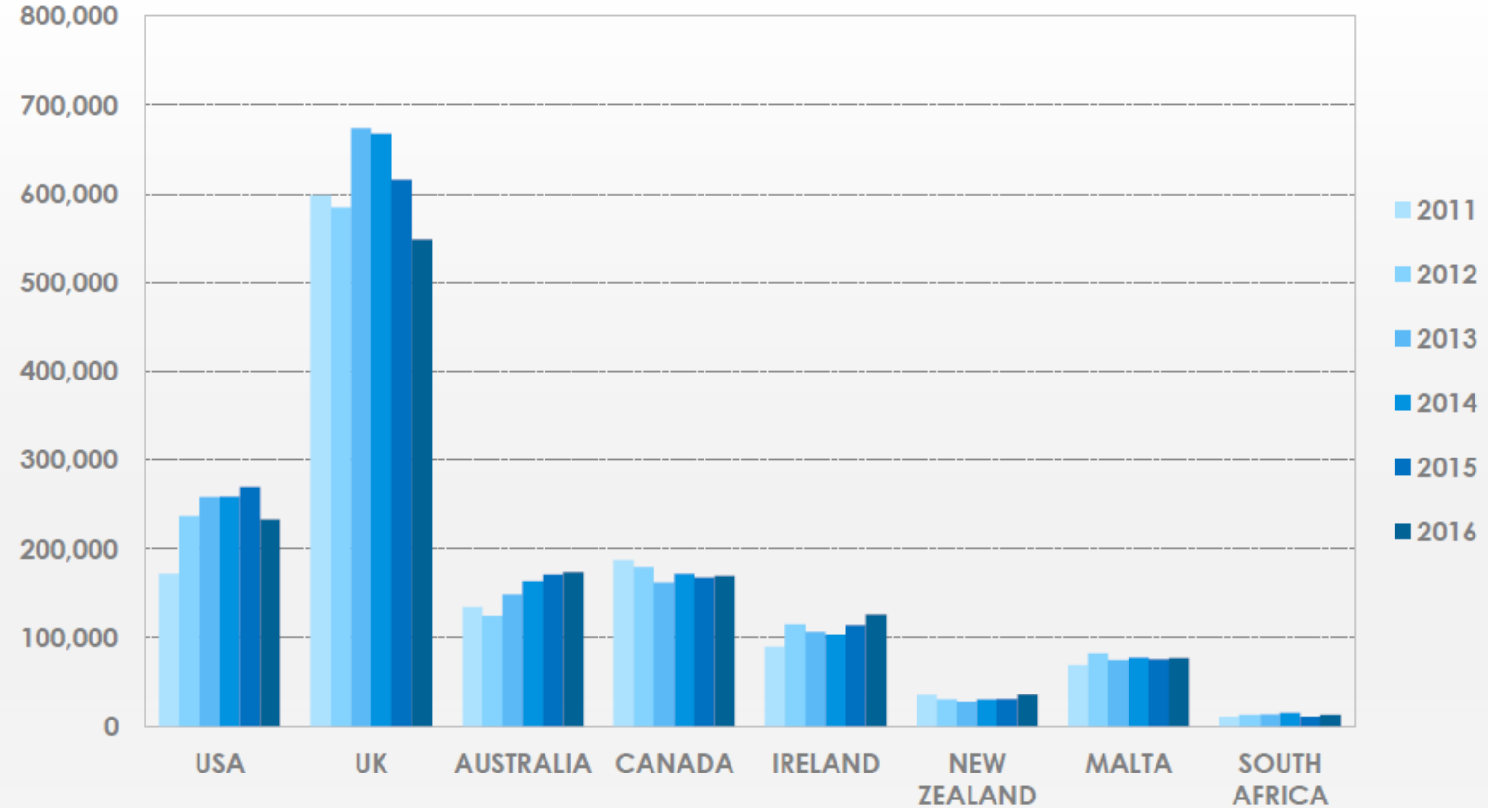
ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

Global Performance Trends

Global ELT Market: the new normal?

Global ELT Landscape

GLOBAL ELT | TOP DESTINATIONS (STUDENT NUMBERS)

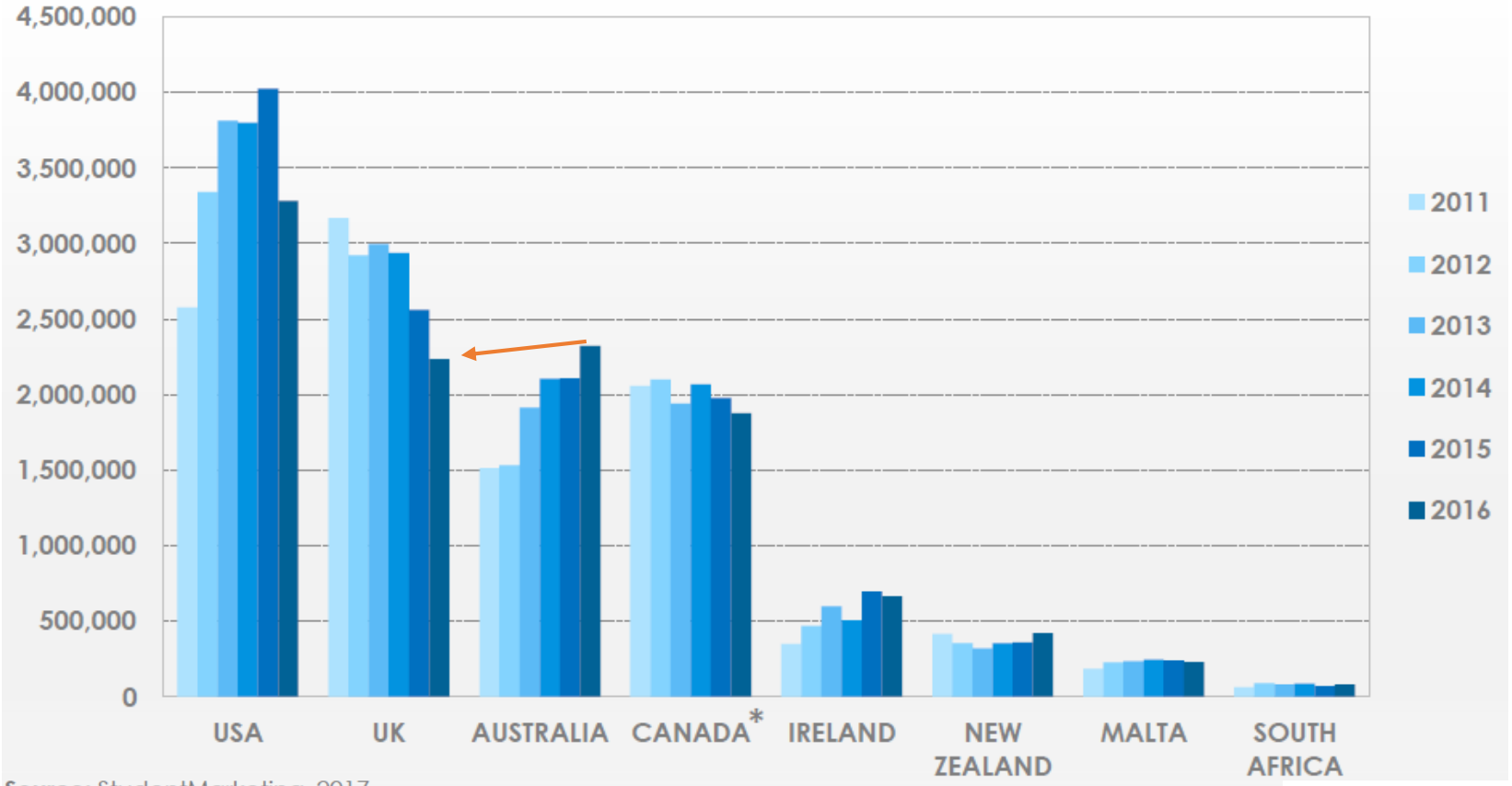


Source: StudentMarketing, 2017

Note: Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount.

Global ELT Landscape

GLOBAL ELT | TOP DESTINATIONS (STUDENT WEEKS)

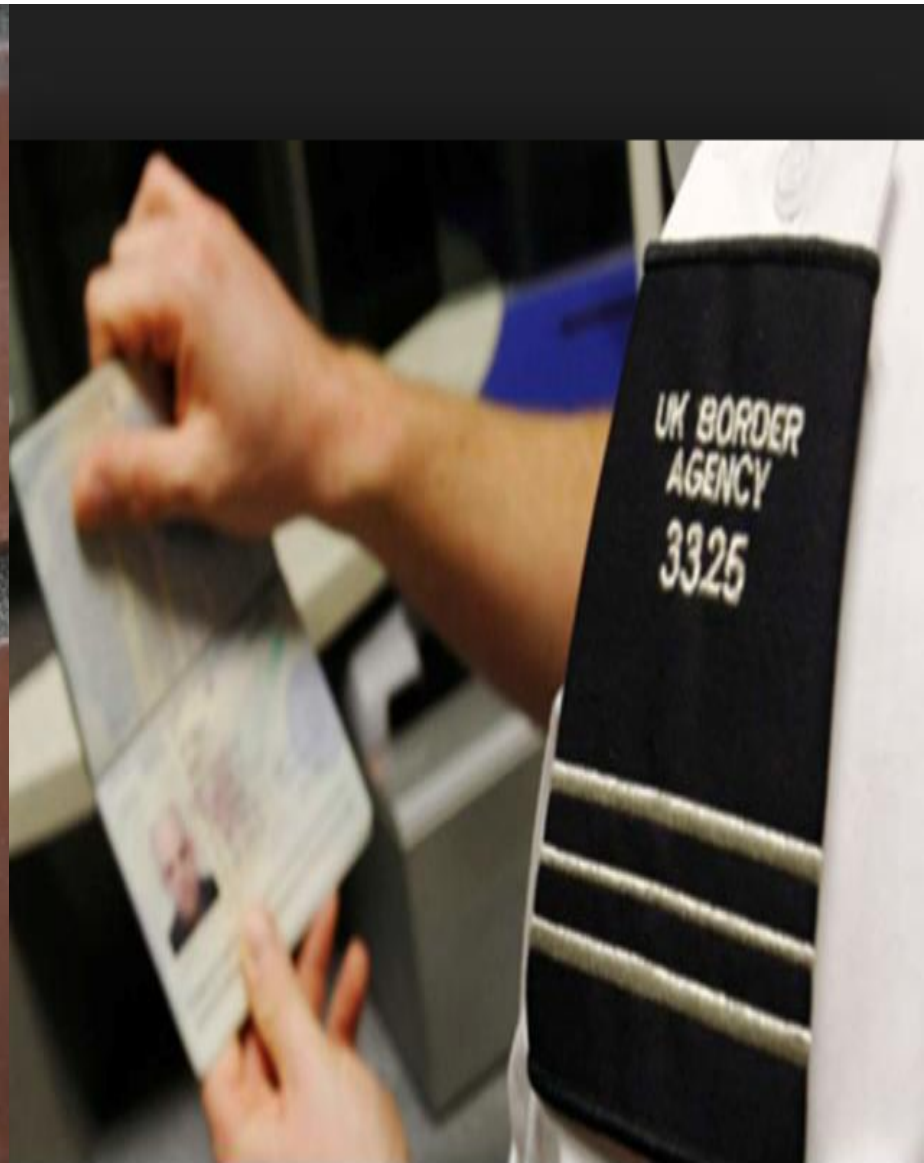


Source: StudentMarketing, 2017
Note: Figures represent extrapolations based on multiple sources. They cover all centres in the destinations and represent the best possible calculation, rather than a headcount.
*Figure is an estimate

Global Events

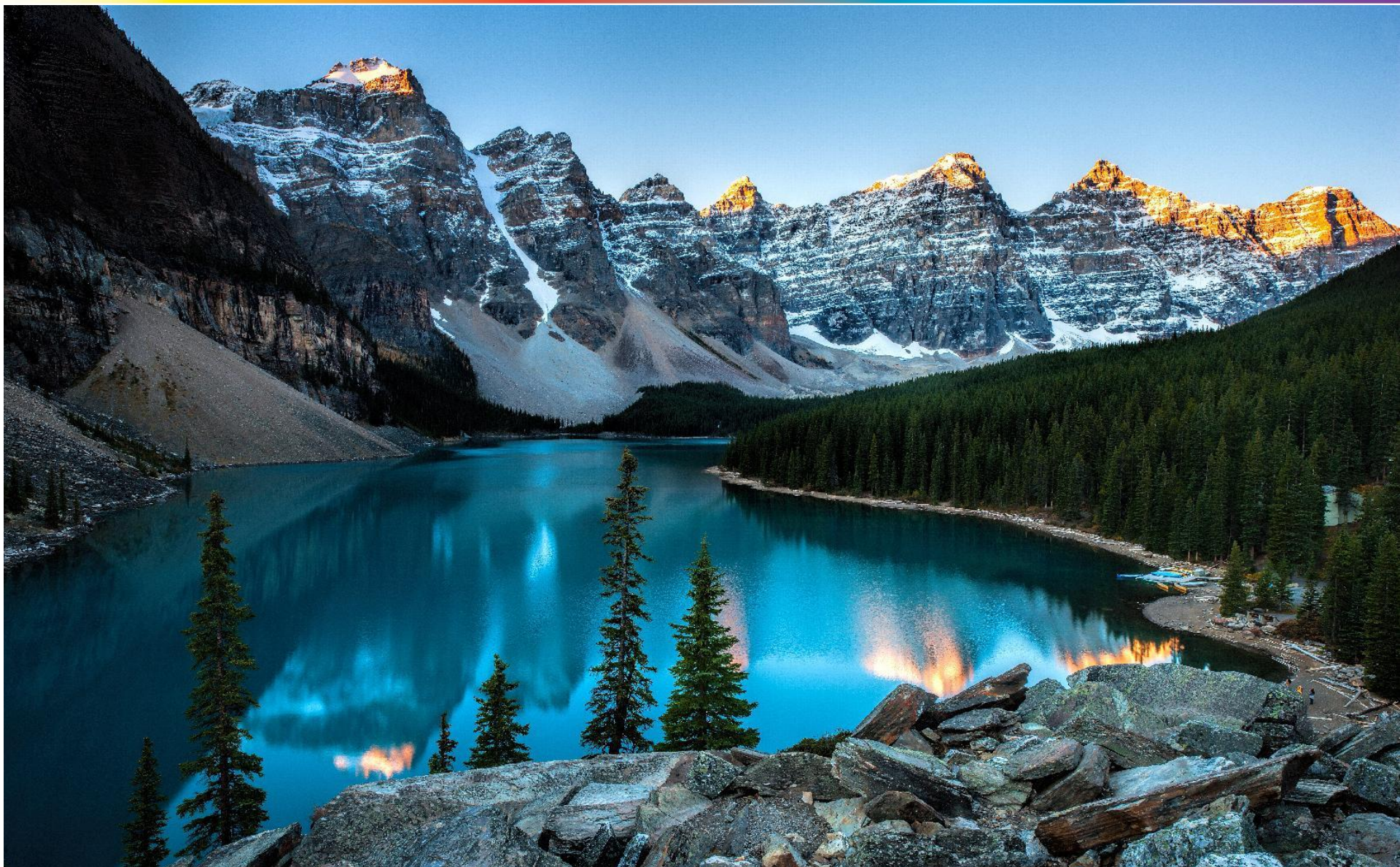
UK: Head in the sand?

UK: The good and the bad



USA: a smaller slice of the market

Canada: cool and aloof?



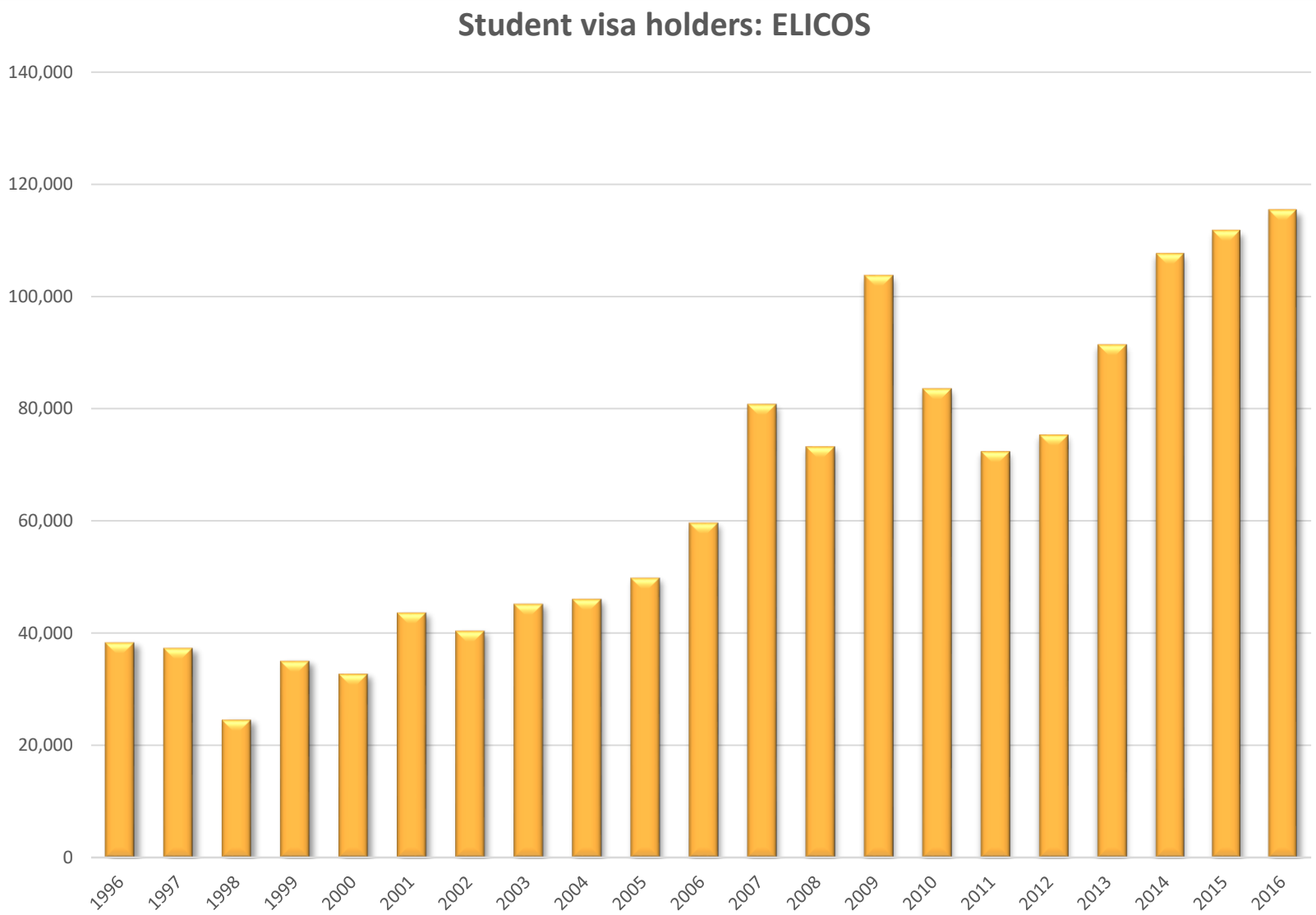
Ireland: luck of the Irish?

New Zealand: taking flight?

Australia

Australia: weathering the storm

Australian ELICOS Sector: Student visa

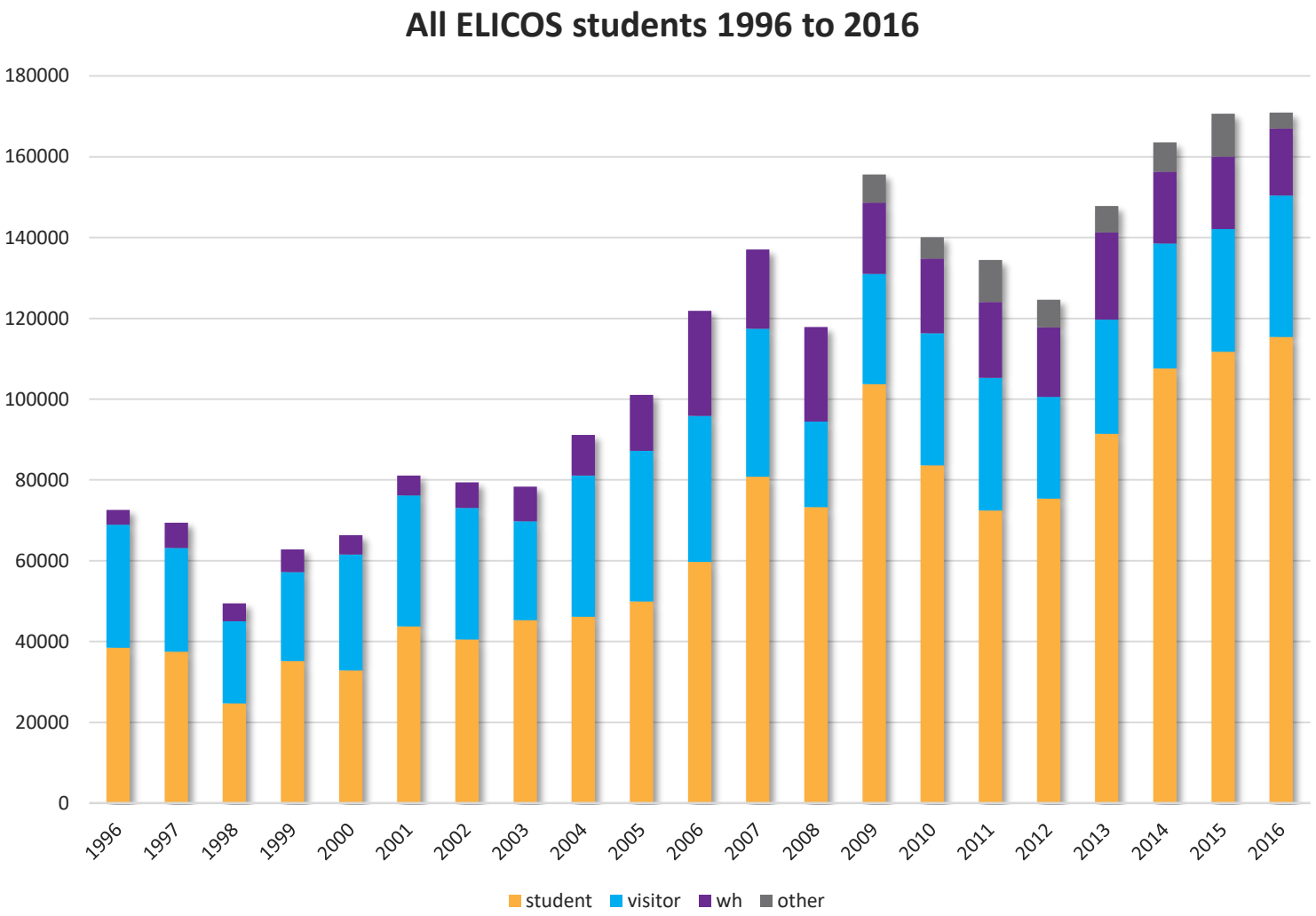


DET – International Student Data 2016

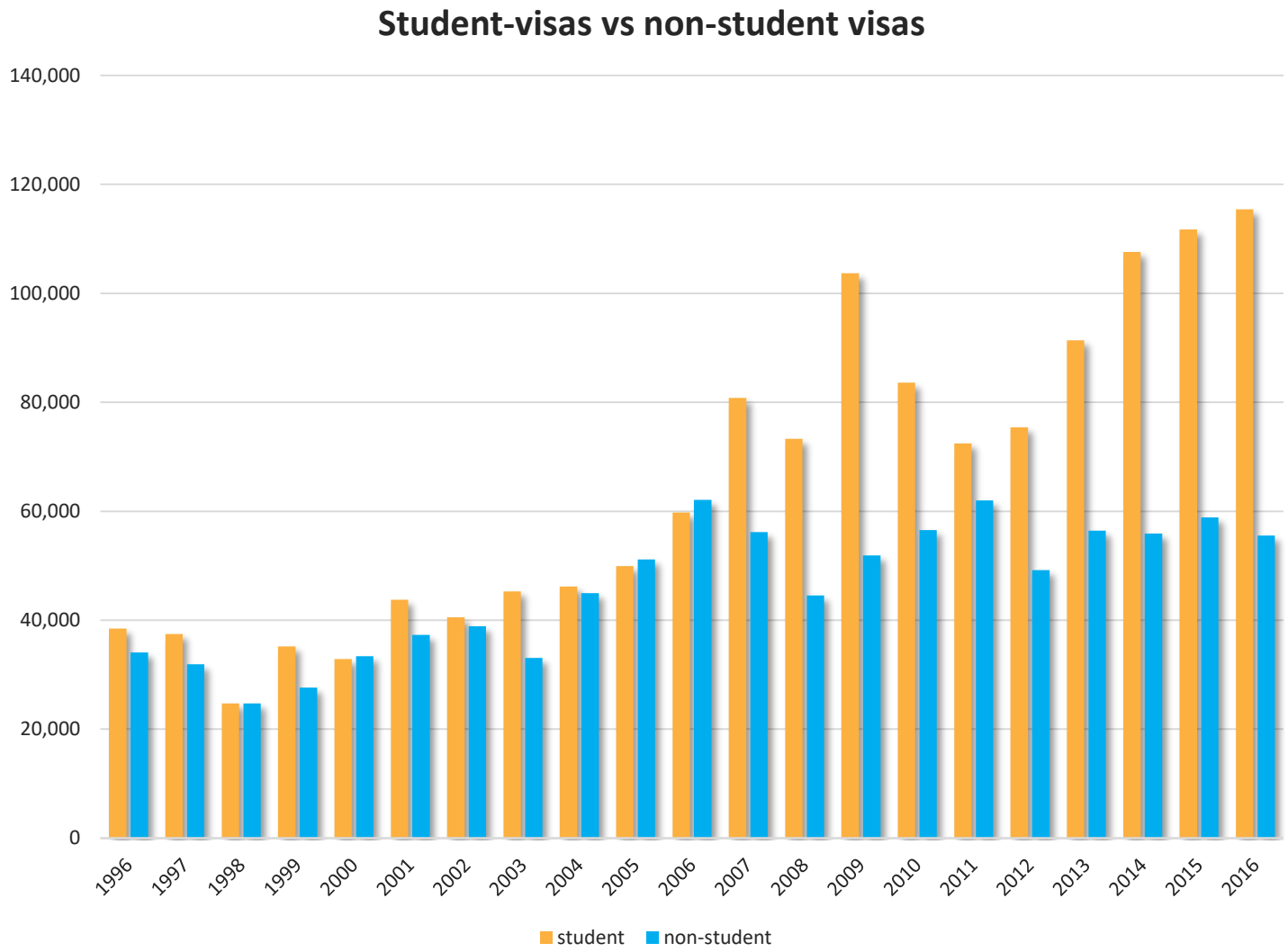
What is the complete picture?

- Department of Education and Training funded sector wide survey.
- 21st year of publication.
- Record participation.
- New market segmentations.

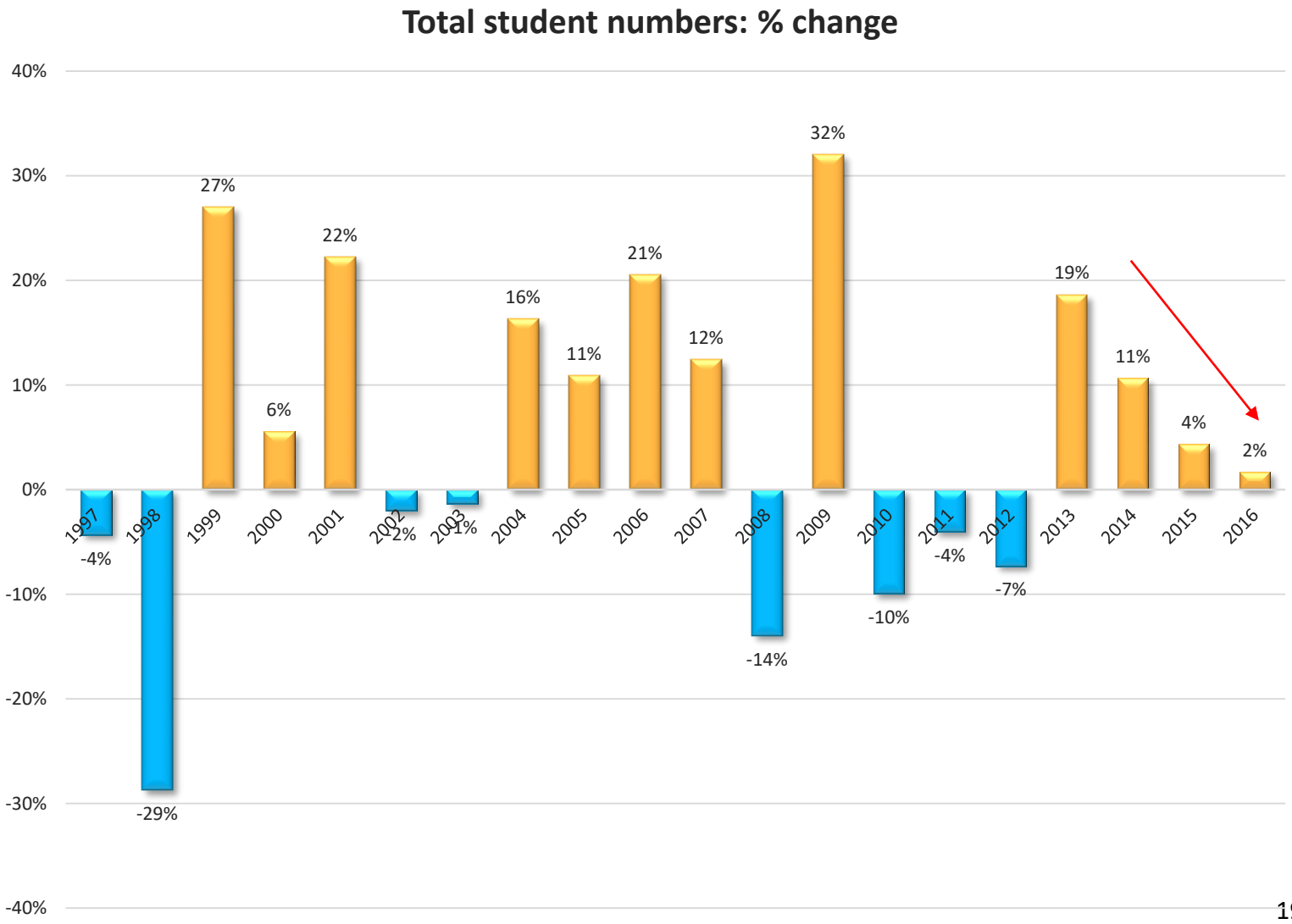
How has ELICOS performed? (All visa types)



How have student visa holder numbers performed?



What is the historical growth pattern of student numbers?



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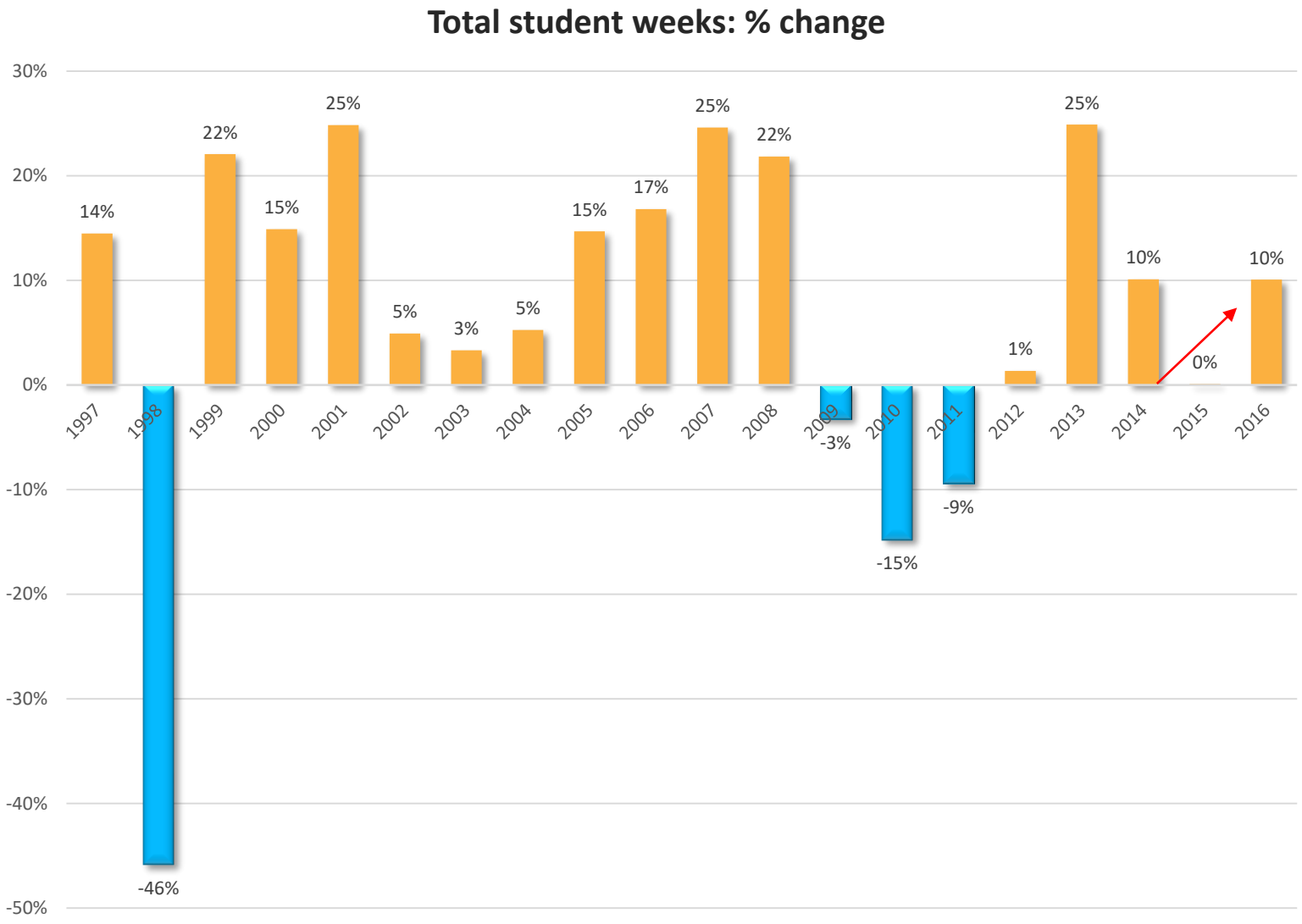
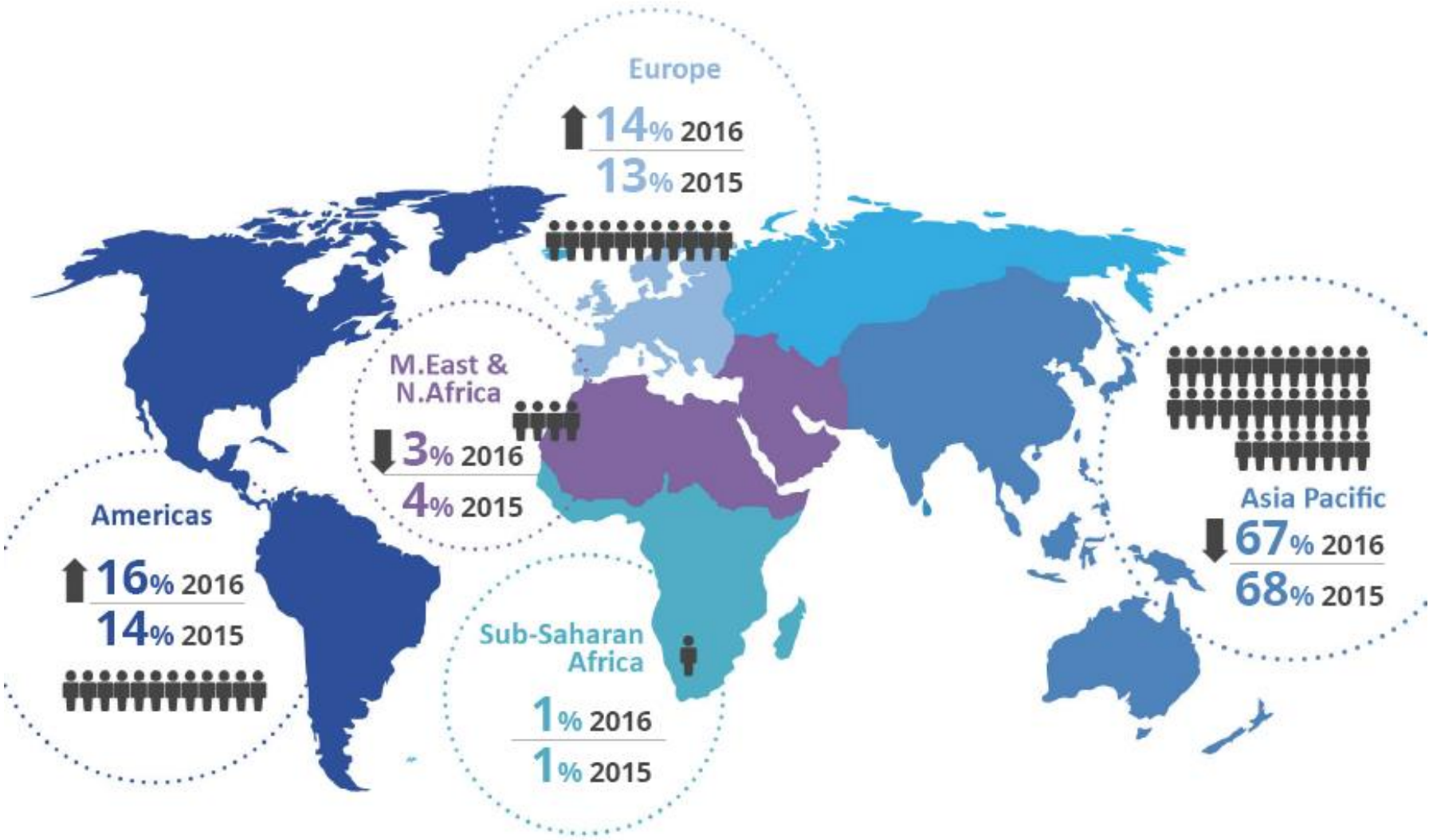
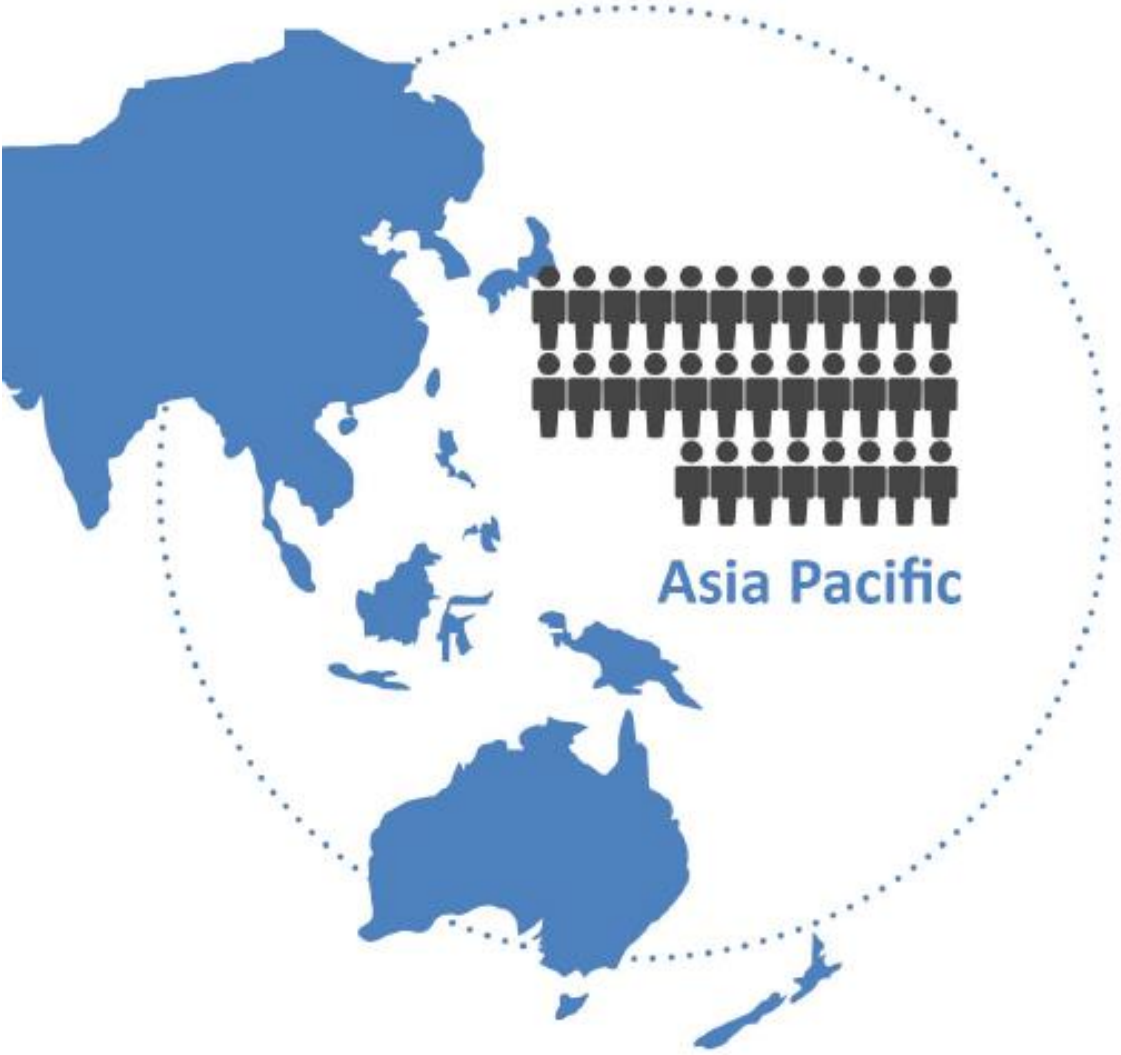


Australia: ELICOS source regions 2016



Australia: APAC trends

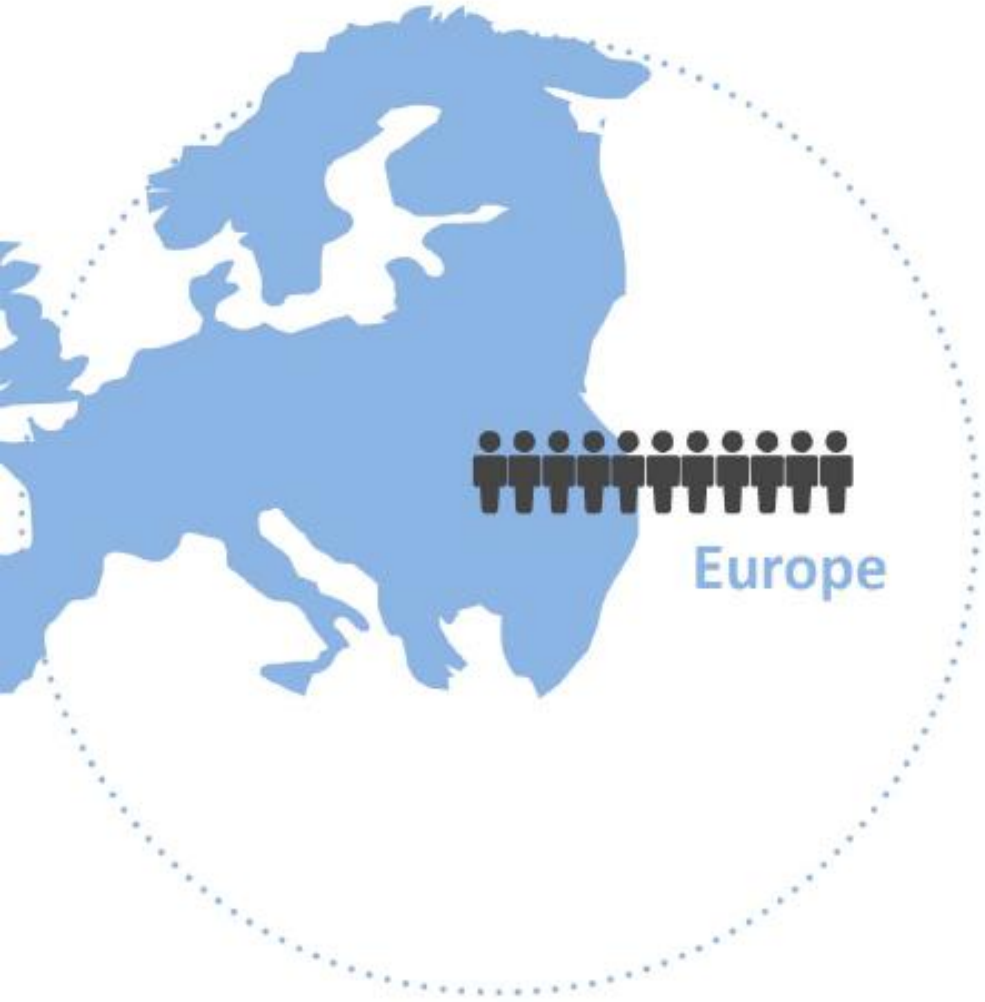


TOTAL NUMBER OF STUDENT WEEKS

1,500,429 2016 ↑ 6.8%

1,404,999 2015

Australia: Europe trends

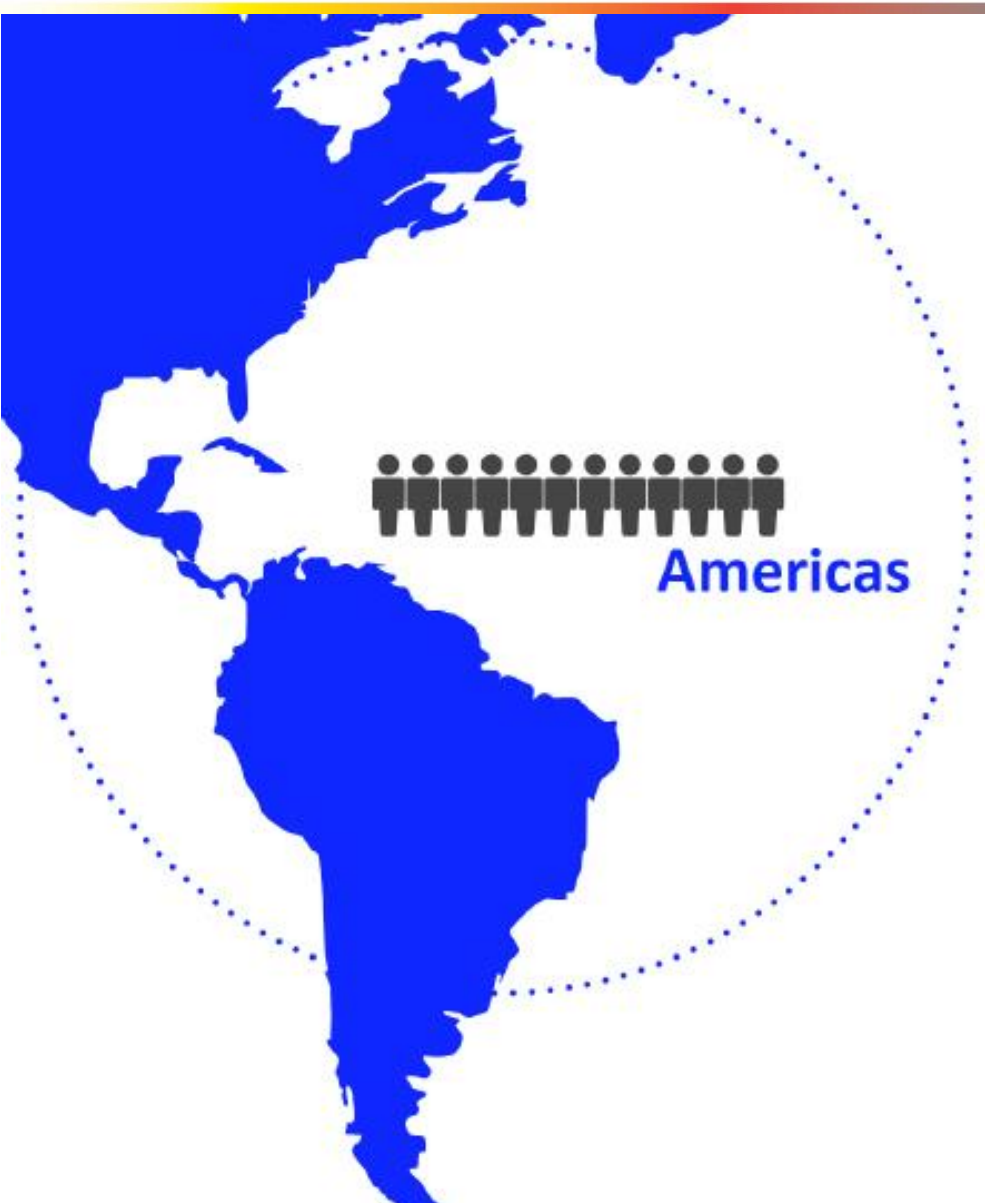


TOTAL NUMBER OF STUDENT WEEKS

238,683 2016 ↑ 15%

207,043 2015

Australia: Americas trends



TOTAL NUMBER OF STUDENT WEEKS

474,623 2016 ↑ 28%

370,121 2015

Australia: MENA Trends

TOTAL NUMBER OF STUDENT WEEKS

95,344 2016 ⬇ -20%

119,630 2015

Australia's ELICOS Sector – diversity?

ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

Top Source Country Performance 2016

ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

TOP 10

ELICOS STUDENTS

75%
2016

1% ↓

TOP 3

44%
2016

1% ↑

TOP 1

22%
2016

1% ↑

Biggest increases in student numbers

TOP **FIVE** INCREASES 2015 - 2016

JAPAN

2016
23,493
19,809
2015

19% CHANGE
+3,684

CHINA

2016
37,322
35,528
2015

5% CHANGE
+1,794

FRANCE

2016
3,614
2,594
2015

39% CHANGE
+1,020

COLOMBIA

2016
9,305
8,384
2015

11% CHANGE
+921

MALAYSIA

2016
3,085
2,193
2015

41% CHANGE
+892

Biggest decreases in student numbers

TOP **FIVE** DECREASES 2015 - 2016

SOUTH KOREA

2016
13,609
16,266
2015

-16% CHANGE
-2,657

INDIA

2016
4,580
6,509
2015

-30% CHANGE
-1,929

SAUDI ARABIA

2016
2,767
4,420
2015

-38% CHANGE
-1,653

TAIWAN

2016
7,539
8,297
2015

-9% CHANGE
-758

VIETNAM

2016
5,443
6,174
2015

-12% CHANGE
-731

2016 student cohort by State

NSW
65% Asia Pacific
17% Americas
16% Europe
2% Middle East
0% Africa

QLD
63% Asia Pacific
19% Americas
15% Europe
3% Middle East
0% Africa

SA
84% Asia Pacific
6% Americas
5% Europe
5% Middle East
1% Africa

SOURCE REGIONS BY STATE

+ TOTAL STUDENTS

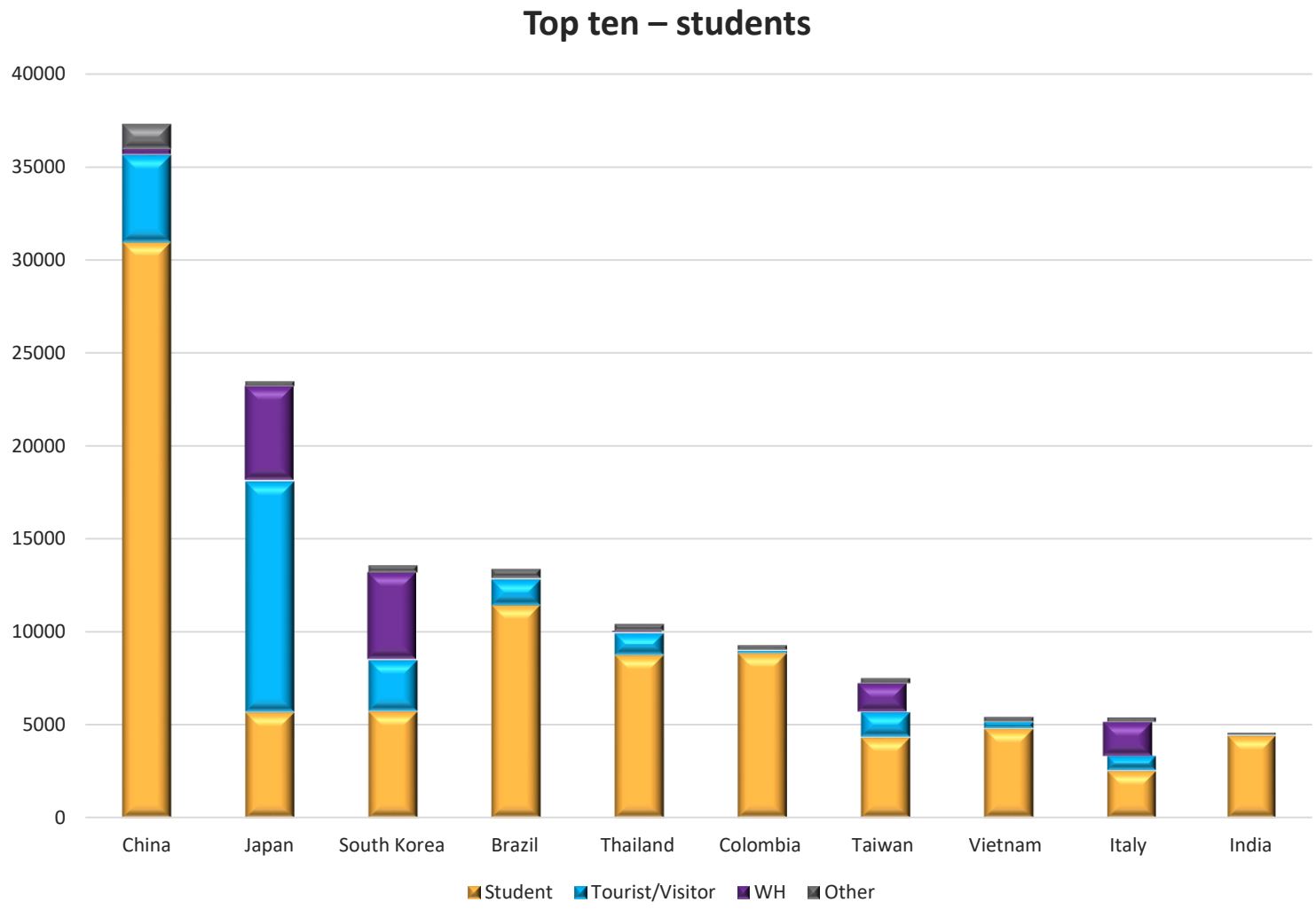
NSW 67,831 VIC 42,518
QLD 39,760 WA 17,565
SA 5,831

TOTAL 173,506

VIC
75% Asia Pacific
13% Americas
9% Europe
4% Middle East
0% Africa

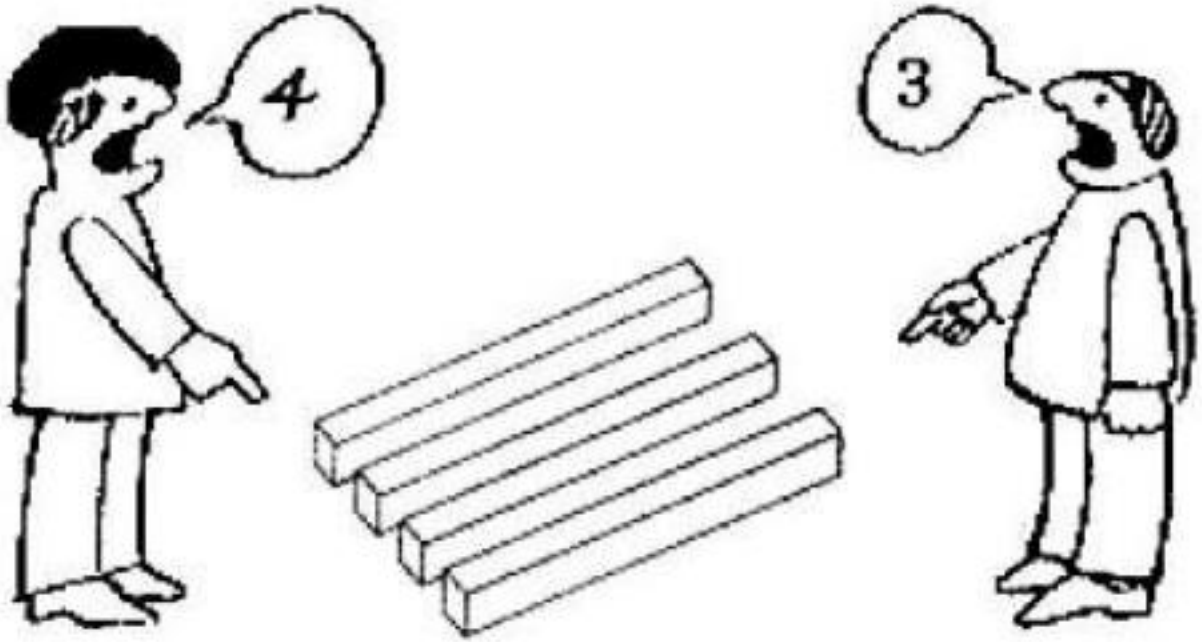
WA
62% Asia Pacific
14% Americas
18% Europe
2% Middle East
4% Africa

Top ten source markets - impact of all visas

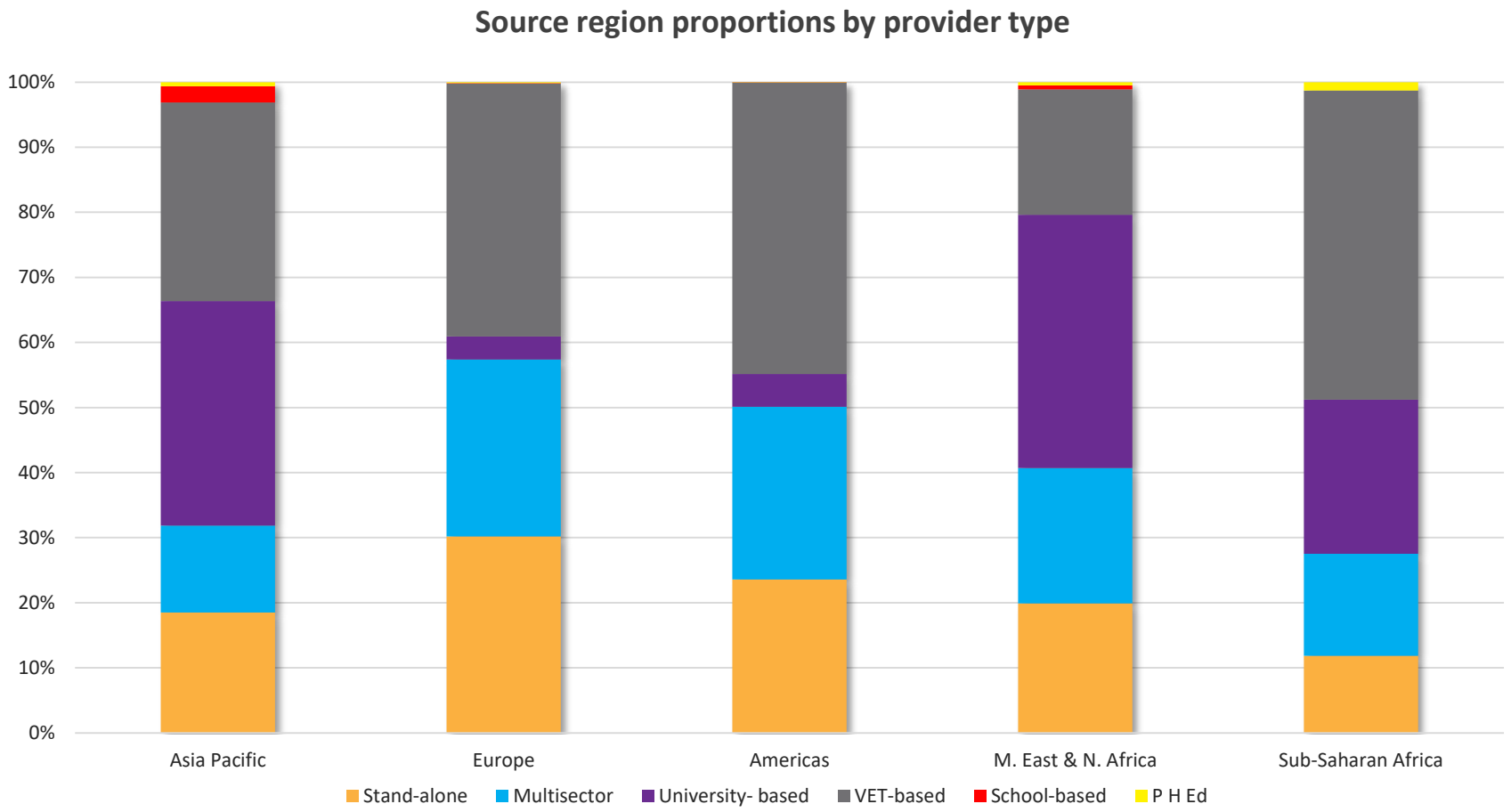


DET – International Student Data 2016

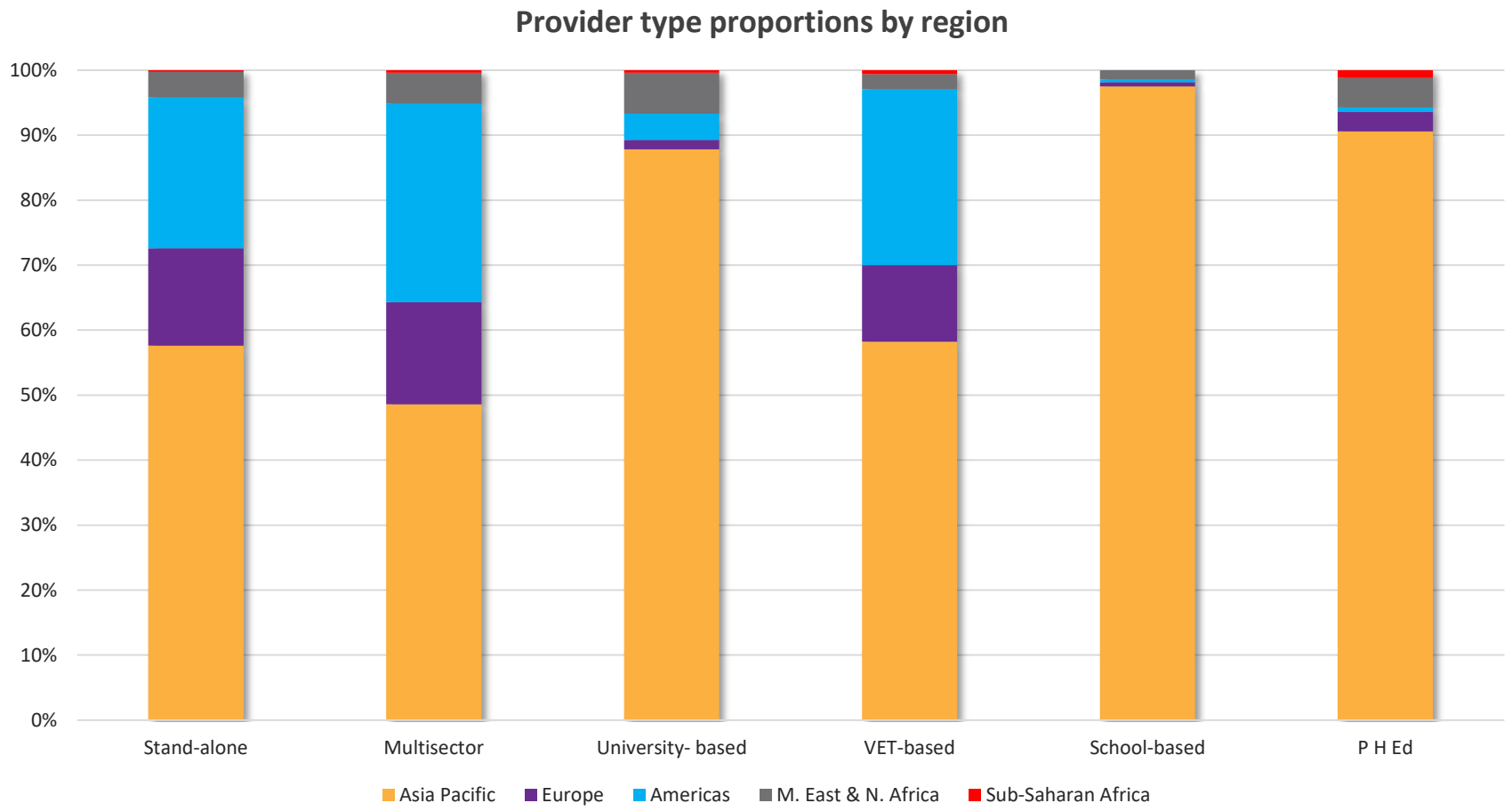
A matter of perspective - reliance or diversity



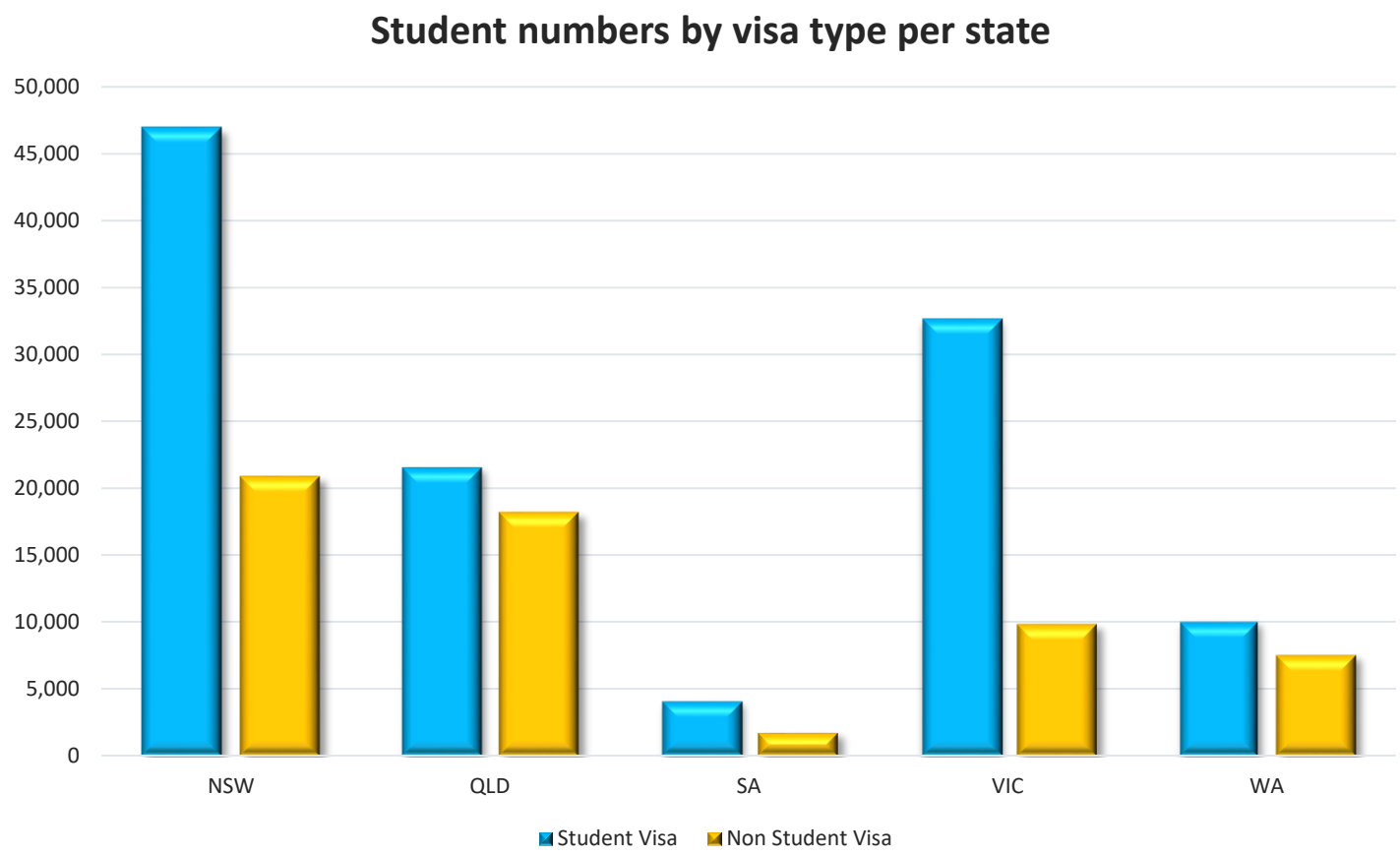
Which types of provider do students from each region study with?



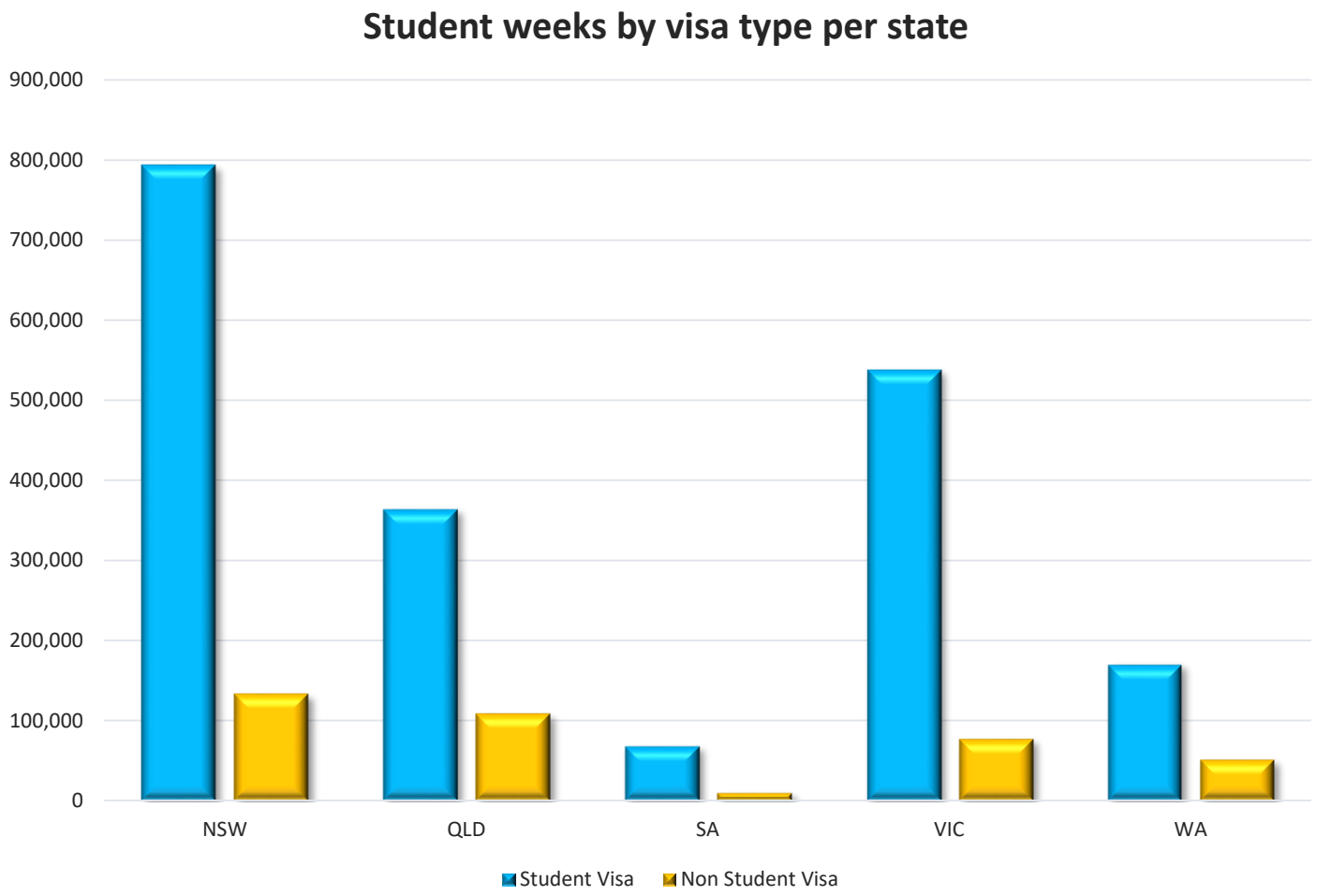
What are the proportions of each provider type from each region?



What was the proportion of non-student visa holders in each state?



What was the proportion of weeks studied on non-student visas for each state?



Opportunities for diversity in other segments?

Top ten source countries by provider type

ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

NSW

STAND-ALONE	MULTISECTOR	UNIVERSITY- BASED	VET-BASED
14%	22%	58%	19%
12%	9%	6%	16%
11%	COLOMBIA 9%	6%	11%
8%	6%	SAUDI ARABIA 4%	COLOMBIA 10%
8%	5%	VIETNAM 4%	10%
MALAYSIA		INDIA	ITALY
COLOMBIA	ITALY	NEPAL	TAIWAN
TAIWAN	SPAIN		SPAIN
VIETNAM	VIETNAM	MONGOLIA	
SWITZERLAND	CZECH REPUBLIC	HONG KONG	MALAYSIA

Top ten source countries by provider type

QLD

STAND-ALONE	MULTISECTOR	UNIVERSITY- BASED	VET-BASED
21%	18%	51%	16%
17%	15%	16%	14%
SWITZERLAND 11%	12%	SAUDI ARABIA 5%	13%
9%	12%	3%	13%
SAUDI ARABIA 7%	THAILAND 6%	VIETNAM 3%	TAIWAN 10%
	FRANCE	TAIWAN	THAILAND
SPAIN	SPAIN	HONG KONG	
TAIWAN	TAIWAN		SPAIN
ITALY	SAUDI ARABIA	INDIA	SAUDI ARABIA
FRANCE		THAILAND	MALAYSIA

Top ten source countries by provider type

ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

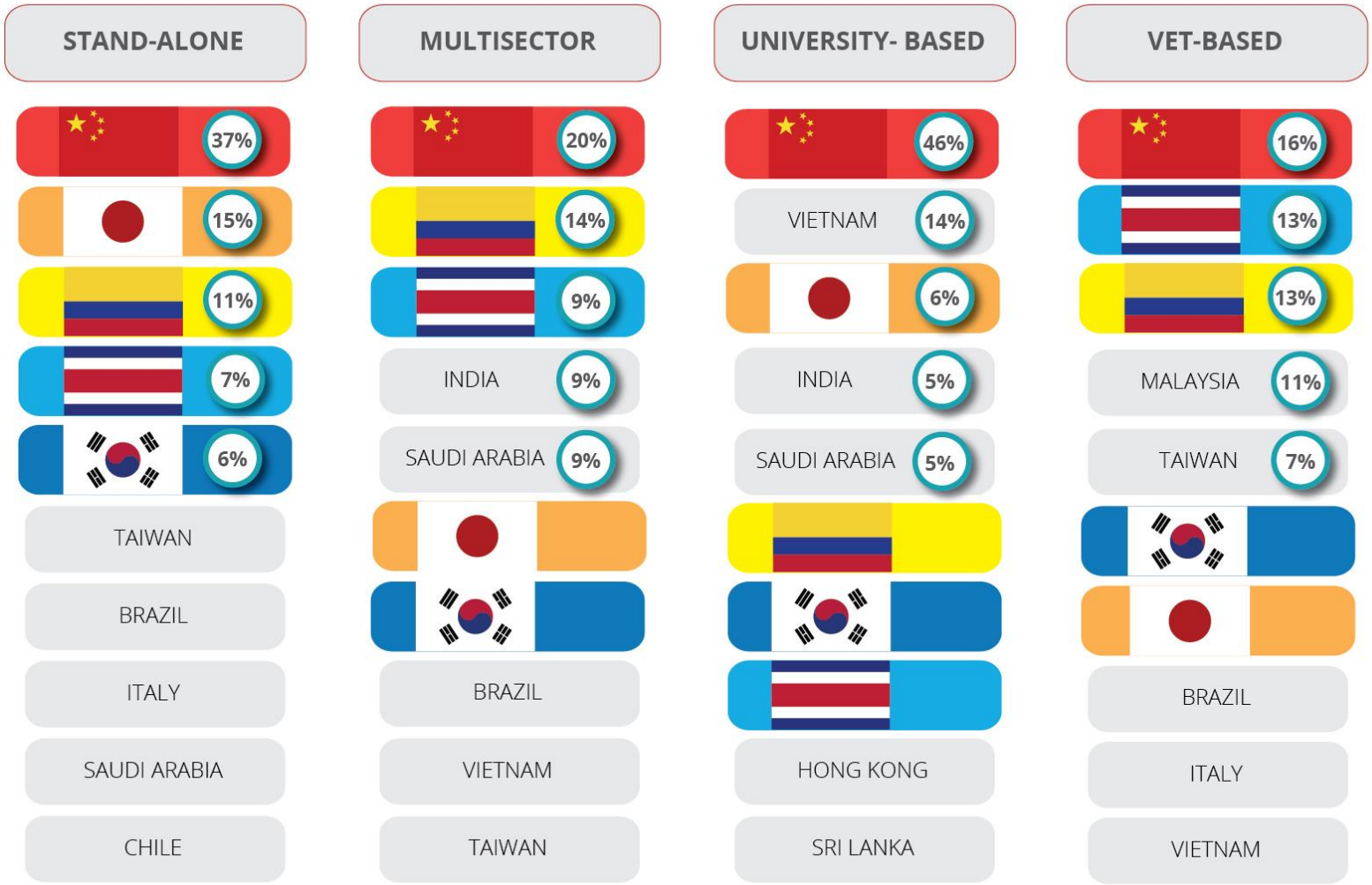
SA

STAND-ALONE	MULTISECTOR	UNIVERSITY- BASED	VET-BASED
18%	28%	72%	28%
17%	12%	10%	19%
14%	BRAZIL 8%	3%	ITALY 10%
COLOMBIA 9%	7%	HONG KONG 3%	8%
8%	HONG KONG 5%	3%	MALAYSIA 6%
NEPAL			THAILAND
INDIA		INDIA	GREECE
TAIWAN	INDIA	USA	KENYA
	COLOMBIA	THAILAND	HONG KONG
BRAZIL	THAILAND	TAIWAN	

Top ten source countries by provider type

ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

VIC



Top ten source countries by provider type

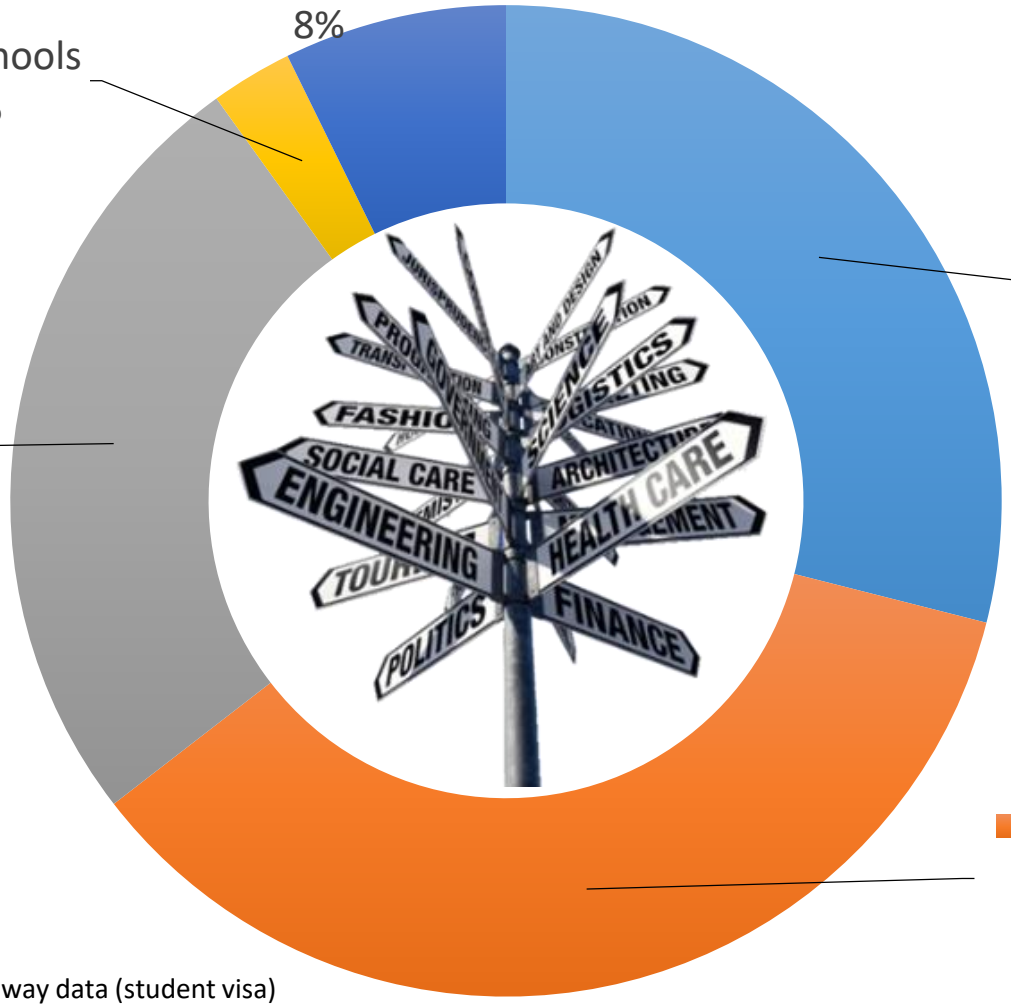
ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

WA

STAND-ALONE	MULTISECTOR	UNIVERSITY- BASED	VET-BASED
18%	15%	34%	22%
12%	13%	INDIA 16%	MALAYSIA 11%
10%	COLOMBIA 10%	10%	HONG KONG 10%
COLOMBIA 7%	8%	VIETNAM 6%	10%
VIETNAM 7%	THAILAND 7%	SAUDI ARABIA 4%	ITALY 7%
THAILAND		THAILAND	
SWITZERLAND	ITALY	COLOMBIA	
ITALY	MALAYSIA		MAURITIUS
	HONG KONG	HONG KONG	COLOMBIA
CZECH REPUBLIC	VIETNAM		

Achieving diversity through pathways - ELICOS

ELICOS Sector and pathway connections in 2016



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 – 2016

Top 10 nationalities and their direct and indirect inter-sector study pathways from ELICOS (2016 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	6.2%	68.9%	3.2%	7.9%	13.9%		24,591
Brazil	13.1%	2.5%	43.2%		13.1%		7,679
Thailand	38.1%	5.5%	55.3%	0.6%	0.4%		4,633
Colombia	56.0%	4.1%	39.6%	0.1%	0.2%		4,290
Korea, Republic of (South)	35.8%	9.7%	50.1%	2.7%	1.7%		3,057
Japan	70.1%	4.5%	15.1%	2.3%	8.0%		3,786
Vietnam	10.9%	54.5%	22.4%	6.8%	5.5%		2,819
Taiwan	41.4%	15.3%	39.0%	2.5%	1.9%		1,763
India	6.2%	78.7%	14.7%	0.1%	0.3%		1,751
Spain	66.7%	1.2%	31.9%		0.1%		1,609
Legend (% of total):	40% to <50%	50% to 70%	>70%				

Dept. Education and Training Pathway data (student visa)

ELICOS Sector and Higher Education – 2016

Sector studied immediately before the commencement of the student's first ever higher education course in 2017 by top 10 nationalities in Higher Education sector in 2017

	Inter-sector pathway						Total
Nationality	*Higher Education only*	*ELICOS - Higher education*	*VET - Higher Education*	*Non-award - Higher Education*	*Schools - Higher Education*		
	Proportion of total for each nationality						Students
China	34.7%	39.9%	1.5%	20.2%	3.8%		42,731
India	79.8%	13.6%	6.0%	0.4%	0.1%		18,671
Nepal	73.8%	14.7%	5.7%	5.8%	0.0%		7,441
Malaysia	80.7%	1.4%	3.2%	13.0%	1.7%		3,980
Vietnam	44.2%	31.9%	10.4%	8.8%	4.7%		4,117
Pakistan	77.0%	11.9%	8.2%	2.8%	0.0%		2,708
Indonesia	69.5%	8.9%	6.2%	14.3%	1.0%		2,405
Hong Kong	43.9%	14.2%	6.1%	28.6%	7.2%		2,049
Sri Lanka	82.8%	9.5%	4.8%	2.6%	0.3%		2,419
Singapore	87.0%	0.1%	1.1%	10.8%	1.1%		1,884
Legend (% of total):	40% to <50%	50% to 70%	>70%				

Dept. Education and Training Pathway data (student visa)

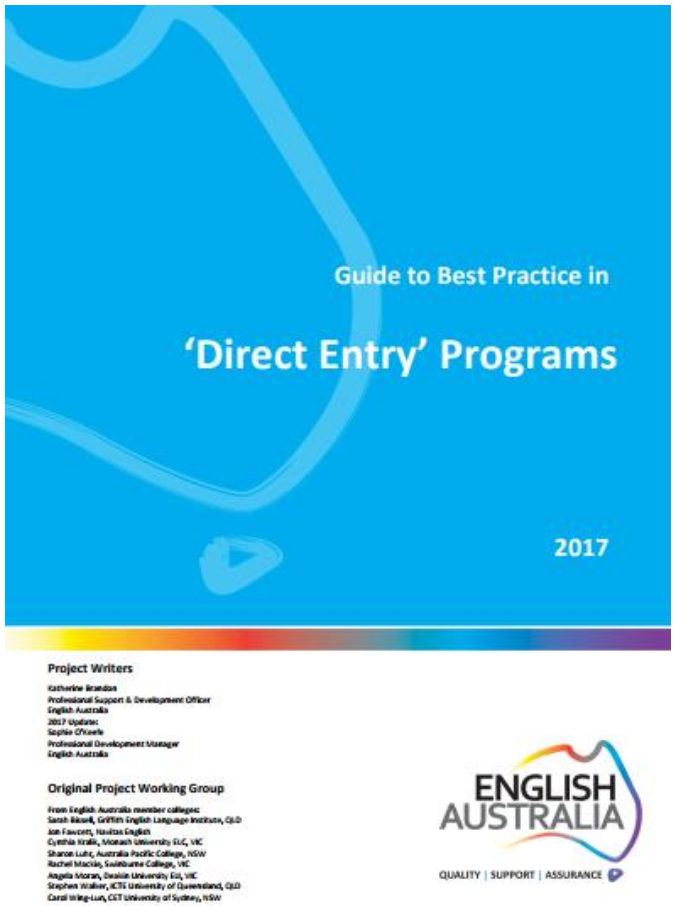
ELICOS Sector and VET – 2016

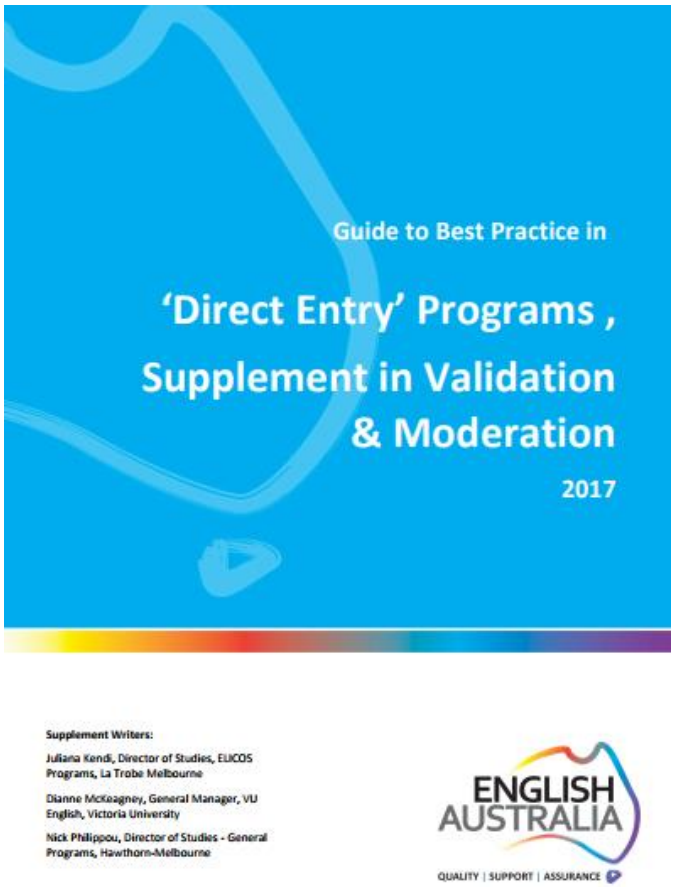
Sector studied immediately before the commencement of the student's first ever higher education course in 2017 by top 10 nationalities in Higher Education sector in 2017

	Inter-sector pathway						Total
Nationality	*Higher Education only*	*ELICOS - Higher education*	*VET - Higher Education*	*Non-award - Higher Education*	*Schools - Higher Education*		
	Proportion of total for each nationality						Students
India	40.5%	7.9%	50.0%	0.5%	1.0%		2,730
Korea, Republic of (South)	61.5%	34.1%	2.6%	0.2%	1.6%		3,574
Thailand	15.2%	82.3%	1.6%	0.1%	0.8%		2,493
China	27.0%	18.5%	41.4%	7.4%	5.7%		5,275
Brazil	19.7%	79.4%	0.3%	0.5%	0.1%		3,991
Malaysia	82.6%	12.8%	3.1%	1.1%	0.4%		2,863
Taiwan	69.6%	27.8%	2.0%	0.5%	0.1%		1,789
Indonesia	59.5%	31.4%	7.9%	0.7%	0.6%		1,064
Nepal	73.2%	8.1%	14.7%	3.7%	0.2%		3,537
Vietnam	17.5%	41.2%	32.2%	2.1%	6.9%		1,443
Legend (% of total):	40% to <50%	50% to 70%	>70%				

Dept. Education and Training Pathway data (student visa)

Best Practice – direct entry program

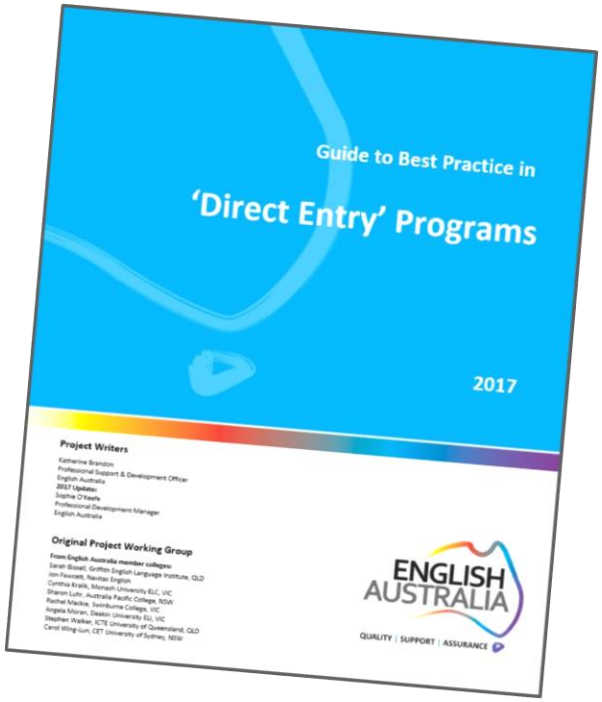




Best Practice – direct entry program

Provides comprehensive examples of best practice from EA member colleges:

- Context of program delivery incl. relationship with receiving institutions & benchmarking of programs;
- Program structure, content and methodology;
- Student placement and monitoring & reporting of student progress incl. assessment principles;
- Resourcing of programs with qualified teachers and adequate curriculum support.

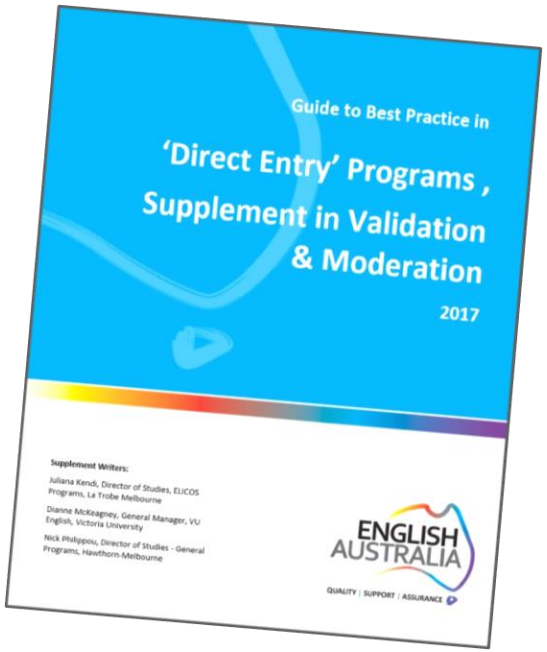


Best Practice – DEP: Supplement

- Catalyst - TEQSA review of ELICOS standards, p.4 'Assessment of ELICOS Students' & English Australia dialogue with TEQSA and ASQA re. best practice in moderation and validation in Direct Entry Programs.

- Covers validation and moderation of assessment in detail – practical guide to developing assessment tools.

- Covers *external* validation of Direct Entry Programs incl. course content - via outcomes benchmarking, expert input and student feedback.



Summary

Global ELT Trends: Summary

- Global demand for ELT is shrinking
- Student numbers are in decline
- Student weeks are also in decline
- Sector is currently oversupplied

- Slow growth
- Some destinations benefiting from others' losses
- Australia, Ireland, New Zealand and the UK

Australia in the Global ELT Marketplace

Australia in the Global ELT Marketplace

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