



Member Driven Policy Leadership
Independent Tertiary Education Council Australia

ITECA Submission

Parliamentary Inquiry Into The National Vocational Education and Training Regulator (Data Streamlining) Amendment Bill 2023

Parliament Of Australia ■ Senate
Education & Employment Legislation Standing Committee

April 2023

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Parliamentary Inquiry Into The Perceptions & Status of Vocational Education & Training

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Separate Attachment:

2022 ITECA State Of The Sector Report



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Part i ■ Executive Summary

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

The VET Data Streamlining program is broadly supported by ITECA. The VDS program, in its best form, promises more timely monitoring of activity in the skills training sector in a way that may guide and inform policy development. In this context, the provisions of the Bill being considered by the Committee are generally welcomed; however, the proposed legislation facilitates both the collection and the use of data in inappropriate ways and thus ITECA does not recommend passage without amendment.

Presently, the National Centre for Vocational Education Research (NCVER) publishes data that enables the monitoring of performance across the skills training sector in a way that recognises the background, purpose, limitations and relevance of the base data. The Bill before the Committee seeks to empower the DEWR Secretary, and by natural extension the Department, to use the data collected via the VET Data Streamlining program for performance reporting at the RTO level. This not only seeks to use activity data inappropriately for performance monitoring, it does so in a manner in which there are no safeguards with respect to either data integrity or source context.

Issues For Further Consideration

- That the Australian Government consider the financial impacts of Bill in more detail, and also in the context of the broader VET Data Streamlining program.
- That more comprehensive engagement with independent RTOs be undertaken with regards to the publication of information.
- If the intent is to use activity level data for performance reporting, consideration be given to complementary measures that reflect the RTO's mission, context, student cohort and student outcomes, such as learning assessments, career outcomes, and equity-metrics.
- Given the new scope of activities (e.g. publication of commercially sensitive information), that decisions made under the *National Vocational Education and Training Regulator (Data Provision Requirements) Instrument 2020 (Cth)* be subject to a merit review.

In a global context, Australia already has some of the most comprehensive and robust skills training system activity and performance reporting, thanks to the work of the NCVER. This Bill creates a real and present opportunity for this reputation to be damaged through the release of information by the Australian Government in inappropriate contexts. This is an outcome that ITECA seeks to prevent.

ITECA looks forward to further engagement with the Committee on this legislation.

Troy Williams
ITECA Chief Executive
Canberra, April 2023

Felix Pirie
ITECA Deputy Chief Executive – Policy & Research

Part 1 ■ An introduction to the independent skills sector

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Issues Summary —

Australia can be proud of its independent skills training sector; one that does the heavy lifting in workforce skilling, reskilling and upskilling. Independent Registered Training Organisations (RTOs) support more than 87% of students in skills training, including the vast majority of students in complex and higher-level qualifications. Significantly, independent RTOs also achieve the highest level of student and employer satisfaction.

Key Points For Consideration —

As noted in the *Expert Review of Australia's Vocational Education and Training Sector* presented to the Australian Government in 2019, the skills training sector has been one of the key pillars of Australia's broader economic success story. Generations of tradespeople and skilled workers have successfully developed their skills and knowledge in the practical work-based learning environment that skills training offers.

The Australian skills training sector is a diverse and vibrant mix of regulated entities across all states and territories and provider types. Although the government-owned and funded TAFE system is synonymous with skills training, registration data from the Australian Skills Quality Authority notes that more than 91% of all RTOs are in the independent sector.

Independent skills training organisations

Associations & Professional Bodies: Typically a not-for-profit body that represents the interests of its members that may be companies (industry associations) or individuals (professions)

Community-Based Education: A not-for-profit, community-based organisation with a primary focus on adult education. Community-based adult education delivers courses relating to leisure, personal and community development, employment skills, preparation for skills training and nationally recognised programs of study.

Private: A privately owned training organisation (e.g. a company).

Enterprise: The training operations of a company, government department or government business enterprise that is registered to provide nationally accredited training

Independent RTOs often specialise in delivering industry-specific training programs that are not available through government-funded training institutions. As a result, these providers can play a crucial role in meeting the skill demands of various industries, which helps to ensure that the Australian workforce has the skills needed to remain competitive and productive.

Competition between independent RTOs can help to improve the quality of skills training, leading to better outcomes for students and employers alike. This competition can also help to keep the cost of training affordable, which can make it more accessible to a wider range of individuals and businesses. In the context of government-funded training, this competition ensures that taxpayers can get value for money in an environment in which,

according to government data published by NCVER, quality, student satisfaction and completion rates are not compromised.

The substantial amount of work undertaken by independent RTOs in providing skills training to key student cohorts, helping them not only into a job, but also into a career, is of core relevance when considering the issues surrounding the collection and publication of skills training data.

Supporting Key Student Cohorts

Indigenous Australians: Independent RTOs support 75.7% of Indigenous Students in skills training including those studying transport and logistics (93.3% of student enrolments) and retail services (81.6% of student enrolments).

Students With Disabilities: Independent RTOs support 70.0% of students with disabilities in skills training, including those studying community services (58.0% of student enrolments) and business services (63.9% of student enrolments).

Low Income & Disadvantage Students: Independent RTOs support 84.7% of low income and disadvantage (low SES) students in skills training, including those studying property services (84.9% of student enrolments) and resources and infrastructure (91.2% of student enrolments).

Students from the cohorts listed above often have lower skills training course completion rates due to a range of factors, such as financial barriers, less academic preparation, limited access to support services, and competing family or work responsibilities. They may also face systemic inequalities that result in lower expectations and opportunities for success. The RTOs that support these students are doing critical work, but compared to sector-wide performance on metrics such as course completions often rank at the lower end of the spectrum.

Independent RTOs are a diverse range of small and large providers with different ownership structures and business models that support different student cohorts. Australian Government initiatives to improve data quality and timeliness across the sector for policy making purposes is welcome; however, these data need to be appropriately collected, require expert analysis and contextualisation often using multi-factor techniques. These data cannot be utilised – let alone published – outside the appropriate context lest improper and irrelevant conclusions are drawn.

“ In considering the contribution of independent RTOs to the positive perceptions in the skills training sector, it is important to note that independent providers are typically smaller and more agile than large public TAFE colleges. ”

Part 2 ■ VET Data Streamlining

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Issues Summary —

The Australian Government's VET Data Streamlining Program is aimed at improving the accuracy, consistency, and accessibility of data collected on skills training across the country. It involves the implementation of a new data collection system, as well as improvements to existing processes for reporting, monitoring, and evaluating skills training programs. The initiative aims to enhance the quality of data collected across the sector, facilitate evidence-based policy development, and improve the overall effectiveness and efficiency of the VET sector in Australia.

“ When it comes to providing Australia with the skills needed to support a growing economy, it is independent RTOs that are clearly the provider of choice for students and employers. ”

Key Points For Consideration —

The VET Data Streamlining program is welcomed as it addresses current challenges in monitoring activity across the skills training system. It addresses problems across the current system where the data collected may be incomplete, inaccurate and inconsistent, thereby making it difficult for the Australian Government to use for decision-making and policy development. The overall aim of the program to enhance the quality of skills training data across the sector, is an aim embraced by ITECA.

Although the current arrangements are less than ideal, it is importance to keep in mind that, in a global context, Australia is widely regarded as having amongst the most comprehensive and authoritative arrangements for data on skills training sector performance, thanks largely to NCVER's work. Used appropriately, the VET Data Streamlining program outputs can build upon that reputation.

VET Data Streamlining - key elements

The Australian, state and territory governments, in partnership with NCVER, are managing the VET data streamlining programs. It has three main elements:

- A new VET Information Standard to replace AVETMISS 8.
- A new Student and Training Activity Reporting System (STARS) that can connect with Student Management Systems (SMS) and will be accessible by governments and NCVER.
- Anytime submission and more timely validation of data.

This means the information that is being reported, how it is being collected, and how frequently it is submitted will change for all RTOs. For some RTOs, it will require a costly upgrade of SMS.

Presently, several key aspects of the VET Data Streamlining program remain unresolved. This is a source of some confusion and tension, not only across RTOs, but also state and territory governments.

One of the largest unresolved questions is how frequently RTOs will be required to submit data. Whereas some RTOs only submit their data to government on an annual basis, at times the Australian Government has suggested that this frequency will change to be weekly. Sometimes, in discussions with the Australian Government that frequency has changed to be fortnightly, monthly, or even quarterly. Regardless of this lack of clarity, there is no certainty

of RTOs on what the new arrangements will be like in terms of frequency of reporting and thus cost to RTOs are impossible to account for. These costs are critical to account for as they can directly affect the bottom line for RTOs, which affects peoples' jobs.

The direct costs to small RTOs, many of which are not-for-profit family-run entities, will add significant administrative burden and cost, which can be challenging for them to manage alongside their task of delivering quality training for students without corresponding cost increases to students.

It is also important to remember that not all independent RTOs have complex student management systems that can readily integrate with the Australian Government's new big data behemoth, the Student and Training Activity Reporting System. The Australian Government is developing a web-based interface for these RTOs to enter data in manually.

At the other end of the size-scale, many large RTOs deliver courses under the VET Student Loans programs and there are around 50 RTOs that deliver higher education courses as dual-sector providers. These providers are all required to use the existing Tertiary Collection of Student Information (TCSI) system to report higher education student data. Under the VET Data Streamlining program they will also be required to use the new STARS arrangements for VET reporting, with the two systems being incompatible with one another (i.e. 'not talking to each other'). The administrative burden for these tertiary education providers is significant; all while the Australian Government has not been able to develop a genuinely streamlined tertiary reporting mechanism that reflects the needs of the sector, despite the sector seeking such a mechanism for some years.

In addition to this, a third data management system is also required by the Australian Government: the Provider Registration and International Student Management System (PRISMS) is the system that each of the more than 1300 independent education providers that deliver to international students are required to use.

Neither TCSI, STARS nor PRISMS 'talk' to one another in a streamlined way. This results in a suite of requirements that tertiary education providers – public and private – are required to manage to satisfy the requirements of government bureaucracy but none of which are designed to assist quality education delivery in any way.

VET Data Streamlining & Performance Reporting

To date, the Australian Government has explained that the VET data streamlining program will use activity level data to guide policy makers. This has been the premise underpinning the independent skills training sector's support for the initiative to date.

With this Bill, the Australian Government is now intimating that activity data will be used in some way to be revealed to monitor the performance of independent RTOs to guide decision making. This is highly problematic as it uses activity data for performance reporting, an unsound approach to data analytics.

Activity data alone should not be used for performance reporting in Australia's skills training system because it provides only a narrow view of training outcomes and does not capture the full impact of training on students and the wider community.

Activity data, such as the number of enrolments, completions, or hours of training delivered, can be useful for monitoring and evaluating the operations of individual training providers and identifying areas for improvement. Indeed, such metrics may be used as internal improvement tools. However, these metrics do not necessarily reflect the quality of training, elements of that training, the relevance of skills to industry needs, or the outcomes achieved by students in terms of employment, income, or further education.

To provide a more comprehensive picture of training performance, activity data should be used in its proper context that has regards for the complexity of the programs being taught, the delivery mode, and the student cohort being taught. There is no useful comparison to be made in benchmarking the performance of an RTO that supports recent Year 12 graduates with the performance of an RTO that's supporting the long-term unemployed. The student profiles and comfort with studying are so radically different so as to make a comparison meaningless.

An example of why using activity level data is not an appropriate use to guide decision making by students and others can be found with an RTO with a large cohort of Indigenous Australians, of which there are many such providers. It's great to see an increasing number of Indigenous Australians in the skills training system; however, they face myriad challenges that see them achieve lower completion rates than the overall student cohort.

Completion Rates (2017 Observed actual)	All Students	Indig. Students
Certificate III	46.1%	33.8%
Certificate IV	51.6%	41.0%
All Enrolments	45.9%	33.4%

Source: NCVER VET Qualification Completion Rates 2021: DataSlice

Measuring the performance of these RTOs solely based on activity data, such as enrolment, completion, or retention rates, may overlook the complexity and diversity of their missions and the value they bring to their communities.

Application To Government-Funded & Fee-For-Service Training

Similarly, when looking at the application of activity data for performance reporting purposes, it is important to note that fee-for-service activity data will produce different outcomes.

Government-funded training is often aimed at providing education and training opportunities to individuals who may not have access to them otherwise. This type of training is typically geared towards individuals who are unemployed, underemployed, or in low-income situations. As such, the success of government-funded training should be evaluated based on its ability to provide a pathway to employment and improve the economic mobility of these individuals.

On the other hand, fee-for-service training is typically funded by the individuals who enrol in the program. These individuals may be seeking to improve their skills in order to advance their careers or pursue personal interests. The success of fee-for-service training should be evaluated based on its ability to provide quality

education and training that meets the needs of the students and prepares them for their desired career paths.

It is not appropriate for the Australian Government to use the VET Data Streamlining program as a performance benchmark by students. It would be necessary to separate the evaluation of government-funded training from fee-for-service training so as to ensure that each type of training is being evaluated based on its specific goals and objectives.

The inappropriate use of data collected via the VET Data Streamlining program can risk undermining support for the initiative in several ways. When data is misused or misrepresented, it can erode the trust of RTOs in the government and its policies. Similarly, it can lead to the erosion of trust in the skills training system more generally. This can lead to scepticism and even opposition to government initiatives, as RTOs may feel that their concerns or perspectives are not being taken into account or that the Australian Government is not acting in their best interests.

Issue/s For Further Consideration —

- If the intent is to use activity level data for performance reporting, consideration be given to complementary measures that reflect the RTO's mission, context, and student outcomes, such as learning assessments, career outcomes, and equity metrics.

Part 3 ■ Key Elements Of The Bill

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Issues Summary —

The purpose of the Bill is to enable better data collection and set in place new arrangements with respect to the use and disclosure of skills training information. Although the Bill in itself is fairly innocuous, it is the powers of delegations that it creates and the unintended consequences that flow from these that are problematic for the skills training sector.

Key Points For Consideration —

Ideally, the Australian Government would have sought the views of independent RTOs before presenting the Bill to the Parliament. This would have ensured that the legislation is practical, effective, and reflects the concerns and perspectives of affected parties. Consultation in this manner can help identify potential problems or unintended consequences, promote transparency and accountability, and enhance stakeholder engagement and support for the legislation.

Industry Engagement

In the Minister's second reading speech, he highlighted that consultation with "...peak bodies and training providers, has demonstrated the support for improving the quality and timeliness of VET activity data. I would like to acknowledge the contributions of these stakeholders in advancing these important VET data reforms." Although this statement is broadly correct, it does not extend to the provisions in the Bill.

The Explanatory Memorandum accompanying the Bill states that consultations on the Bill were undertaken with the NCVER, the Skills Senior Officials' Network, and the state and territory ministers responsible for skills. These limited consultations, the Explanatory Memorandum notes, fulfil the requirements of the Intergovernmental Agreement for Regulatory Reform in Vocational Education and Training.

It is critical to note that the independent skills training sector was not consulted about the provisions of the Bill.

In 2022, the Australian Government renewed its commitment to increased transparency and improved decision making. This is underpinned by the principle that an impact analysis is required for all policy proposals of government that would be expected to drive a change in behaviour such as changes to rights, powers, obligations or responsibilities where those changes would have major impacts.

Financial Impact

The Explanatory Memorandum accompanying the Bill states that "The Bill has no financial impact on the Commonwealth or National Vocational Education and Training Regulator Registered Training Organisation (NVR RTOs). There has been insufficient time to consider and test this claim, particularly since there was no

prior engagement with the skills training sector before it was presented to the Parliament.

It is important that the Australian Government consult with business on the potential costs associated with the Bill to ensure that the legislation is practical and effective, and that the compliance costs are reasonable and manageable for affected parties. Failure to consider the cost implications of new legislation can place undue burden on independent RTOs, placing their sustainability at risk and diminishing their ability to deliver quality outcomes for students.

Before passing the legislation, the Parliament should consider issues associated with the publication of commercially sensitive data to ensure that the release of information does not harm the interests of those independent RTOs, their student cohorts and relevant employers. This consultation can help balance the public interest in transparency with the need to protect the reputation of the businesses.

Data Publication In The Correct Context

The Bill Amends the *National Vocational Education and Training Regulator Act 2011 (Cth)* to support data collection and arrangements in relation to the use and disclosure of skills training system activity data. This envisages disclosure (i.e. publication in the public domain) of data collected under the VET Data Streamlining program in ways that have not previously been raised by the Australian Government.

The Bill creates the explicit authority for the DEWR Secretary to release information (which excludes personal information, unless the personal information is the name of the RTO) to the public about skills training, that may include:

- The number of students enrolled with an RTO;
- Without context, the completion rates for the RTO or in a specific course that it offers;
- Without context, the student satisfaction rates at an individual RTO; and
- Other information to help inform student decisions.

The Bill also envisages that the data may be attributed to a specific individual RTO, perhaps via the MySkills website. Therefore, information on an RTO such as the number students and completion rates may be made available in the public domain without regard for the context in which that data should be used. The skills training sector's future support for the VET Data Streamlining program is compromised by the potential outcomes of this legislation.

The Bill seeks to remove limitations on the use and disclosure of information collected under the VET Data Streamlining program. It is of some significant concern that an independent RTO will have no recourse to prevent this disclosure from happening, for example, in instances that might be commercially sensitive or in cases relating to delivery of programs of national significance.

Merits Review

The Bill continues the egregious environment where an independent RTO is prevented from contesting a decision under the *National Vocational Education and Training Regulator (Data Provision Requirements) Instrument 2020 (Cth)* to collect

and / or publish information. That is, decisions made under this instrument is subject to merits review. This is more critical in the context of publication of data, than it is for data collection for reasons outlined above.

The stated reason that merits review is not available is that the decision not to grant an exemption does not of itself have an adverse effect on the interests of a provider unlike, for example, a decision to cancel registration, not renew registration, or not change the scope of a provider's registration; however, this is in error.

The new framework permits for a new scope of activity, principally the publication of commercially sensitive material that an independent RTO should be able to consent.

Furthermore, ASQA has stated that an RTO seeking exemptions to data reporting requirements would involve a disproportionate cost to the significance of the decision under review and provide an increase in administration for the regulator having regard to its finite resources. This is a curious and arguably spurious argument in a context where ASQA operates on a cost recovery model.

At face value, the Bill seems innocuous; however, it is clear that it may have numerous unintended consequences due to its complex interaction with the operations of independent RTOs and students.

The relatively minor changes to set out in the Bill will have ripple effects that concern independent skills training providers. It is therefore appropriate that the Australian Government conduct a thorough impact assessment and consult more fully with a broader range of stakeholders to identify and mitigate potential unintended consequences before enacting legislation.

Issue/s For Further Consideration —

- That the Australian Government consider the financial impacts of Bill individually, and also in the context of the broader VET Data Streamlining program.
- Given the new scope of activities (e.g. publication of commercially sensitive information), that decisions made under the *National Vocational Education and Training Regulator (Data Provision Requirements) Instrument 2020 (Cth)* be subject to merits review.

Part 4 ■ Focus - Impact On Community Colleges

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Issues Summary –

Community Colleges play a critical role in the skills training system. This category of skills training providers deliver local skills training, often to challenging cohorts that hugely benefit from skills training. Rather perversely, the Bill may jeopardise the excellent reputation of these providers.

Key Points For Consideration –

Across Australia, there are some 200 community colleges. They offer skills training programs to local areas, often short courses, skill sets, across a wide variety of disciplines. Community colleges are an integral part of the independent skills training sector, with many being ITECA members, and collectively support 10.5% of the 4.3 million students in skills training – that's 449,500 students.

Community colleges often provide access to education and training opportunities for individuals who face barriers to participation, such as financial, social, or educational disadvantages. Many of these students face systemic inequalities that result in lower expectations and opportunities for success. That's what makes the work of community colleges so important in an Australian context.

Using Data In The Correct Context

The NCVER data show that course completion rates across many of the critical communities supported by independent RTOs (e.g. long-term unemployed and Indigenous Australians) are below national averages. These lower completion rates are due to barriers such as lack of support, financial constraints, cultural differences, and limited access to resources and opportunities.

Publication of course completion rates is highly problematic for many community colleges, and also private RTOs, that support these challenging cohorts.

If the Australian Government were to publish on the existing MySkills website, or even a bespoke site, an RTO's overall or course completion rates for Community Colleges, it would likely indicate that the RTO is underperforming compared to other RTOs. However, such an assessment would be made without the appropriate and necessary context. Although some completion rates may be lower than those for the overall student population, the RTO may indeed be achieving great outcomes for its particular student cohort. This needs to be supported.

As noted above, community colleges often serve challenging student populations, such as low-income, Indigenous Australians and long-term unemployed persons who require significant academic and personal support to succeed. The following NCVER data highlights the differential outcomes for government-subsidised students only at community colleges against those subsidised students across all provider types.

Completion Rates (2017 Observed Actual)	All RTOs	Comm. Coll
Certificate I	32.5%	22.5%
Certificate IV	42.2%	24.0%
All Enrolments	47.0%	38.8%

Source: NCVER VET Qualification Completion Rates 2021: DataSlicer.

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Measuring the performance of these RTOs solely based on activity data, such as enrolment, completion, or retention rates, may overlook the complexity and diversity of their missions and the value they bring to their communities.

Part 4 ■ Focus - Impact On Enterprise Training Providers

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Issues Summary –

Enterprise RTOs are the training arms of businesses, government departments and agencies that deliver training to their employees and internal stakeholders. The Bill envisages making information on their training activities available in the public domain even though this will be of little value, and in some cases, will be commercially sensitive.

Key Points For Consideration –

A unique type of training organisation, these are commonly used by businesses, government agencies, and industry associations to provide tailored and cost-effective training programs that meet their specific needs and standards. As a general rule, the students at RTOs are drawn from their parent organisation's staff, volunteers and similar stakeholders.

Most enterprise RTO do not deliver courses to the public. In that context, publishing information about its student number and performance outcomes is of questionable merit and little value.

Publishing Data

As enterprise RTOs often train only their own workforce and do not offer courses available to the public, there is no need to make this available to the public. In this context, the intended outcomes of the Bill are questionable.

Many ITECA members that are enterprise RTOs are concerned about publicly making their student enrolment data available because it can reveal sensitive information about their business operations, such as their workforce size, skill gaps, training budgets, and market position. This data can be misinterpreted or misused by competitors, customers, or regulators, leading to unfair competition, reputational damage, or compliance risks. Therefore, enterprise RTOs need to balance the benefits of transparency and accountability with the need to protect their confidential information and intellectual property.

Further consultations with enterprise RTOs concerning the VET data streamlining program are necessary to ensure that the program meets the needs and expectations of all stakeholders, including training providers, employers, learners, and government agencies. These consultations can identify potential risks, opportunities, and trade-offs associated with the program, such as data privacy, security, accessibility, and usability.

Appendix A ■ ITECA Introduction

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

Formed in 1992 the Independent Tertiary Education Council Australia (ITECA) is the peak body representing independent providers in the skills training, higher education, and international education sectors. Consistent with ITECA's tertiary education leadership role, the ITECA membership includes a growing number of industry associations and professional bodies that have an interest in the development of qualifications and microcredentials.

ITECA empowers its members with the information to make sound business decisions and the influence to drive reform.

With a firm eye on creating an environment that supports students, ITECA members are strong advocates for an integrated tertiary education system operating as one, yet the skills training and higher education sectors retain their separate strengths and identities. Allied to this is the focus of ITECA members on red tape reduction, where the regulatory environment protects students without placing redundant, duplicative and burdensome reporting obligations on providers in the skills training, higher education, and international education sector.

Through regular updates, ITECA keeps its members up to date on changes to student loan and funding programs, regulatory changes, strategic risks to the sector's sustainability and reputation, plus emerging business opportunities.

ITECA convenes some of the tertiary education sector's most significant events, including the annual ITEC Conference that sells out each year plus the annual VET Business Summit series of events held throughout the country. A number of specialist events in the higher education and skills training sector are also highly valued by members.

As a growing community of independent tertiary education providers that share a commitment to excellence, the ITECA membership has grown by around 20% on a year-on-year basis for the past three years.

In 2019 ITECA changed its name, having previously been known as the Australian Council for Private Education and Training (ACPET). The change of name reflected the fact that many ITECA members are not-for-profit providers (not just private providers) and the increasing number of ITECA members that deliver higher education programs.

ITECA has an established reputation for working with the Australian, state and territory governments. Through engagement with ITECA, governments have been able to increase the tertiary education sector's trust in the policy-making process. ITECA is seen as an independent and objective stakeholder that is working to create an environment in which students have access to quality programs delivered by independent skills training, higher education and international education providers.

Members of ITECA are united, informed and influential. They set our agenda, guide our projects, fund our activities, and directly benefit from the results.

ITECA Membership – It's a great time to get involved.

www.iteca.edu.au

“ A growing community of independent tertiary education providers that share a commitment to excellence, the ITECA membership has grown by around 20% per year for each of the past three years. ”

Appendix B ■ National Skills Training Snapshot

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

The following data from the National Centre for Vocational Education Research (NCVER) builds an understanding of the significant contribution that independent Registered Training Organisations (RTOs) make to workforce skilling, reskilling and upskilling of the Australian workforce. To build a comparative understanding, the comparative data for public TAFE colleges is also provided.

Skills Training Enrolments – All funding Types	Independent RTO	TAFE
Certificate I & II	44.1%	32.6%
Certificate III	61.2%	35.0%
Certificate IV	69.4%	30.2%
Diploma (and above)	70.9%	30.0%

Government Funded Student Satisfaction	Private RTO	TAFE
Satisfied with support services	81.5%	77.5%
Satisfied with teaching	88.9%	87.2%
Satisfied with the facilities	85.0%	84.2%
Satisfied with the learning resources	85.4%	81.6%
Satisfied with the training overall	90.7%	88.9%

Government Funded Student Completion Rates	Private RTO	TAFE
Certificate I	39.5%	22.4%
Certificate II	56.6%	33.4%
Certificate III	57.1%	50.9%
Certificate IV	53.3%	44.5%
Diploma (and above)	52.6%	52.1%
All qualification levels	55.2%	42.4%

In its 2020 review of the *National Agreement for Skills and Workforce Development*, the Productivity Commission noted that “while some claim that the quality of training is superior at TAFEs, the evidence suggests that at least some outcomes (satisfaction and labour force outcomes) are similar across provider types.” The data above reflects the Commission’s assessment.

— Note
Percentages may exceed 100% as a student may enrol with both an independent RTO and TAFE.
Percentages may exceed/not reach 100% due to the exclusion of VET in schools students.

— References

NCVER DataBuilder (2022)

Appendix C ■ Common Tertiary Education Abbreviations

NVETR Amendment Bill Inquiry – VET Data Streamlining Program

AQF	Australian Qualifications Framework
AVETMISS	Australian Vocational Education and Training Management Information Statistical Standard
ASQA	Australian Skills Quality Authority
DEWR	Department of Employment and Workplace Relations (Australian Government)
ITECA	Independent Tertiary Education Council Australia
HEPPP	Higher Education Participation and Partnerships Program
ISSP	Indigenous Student Support Program
JSA	Jobs and Skills Australia
JSC	Jobs and Skills Councils
NCVER	National Centre for Vocational Education Research
NVR	National VET Regulator
PRISMS	Provider Registration and International Student Management System
RTO	Registered Training Organisation
TAFE	Technical and Further Education
TCSI	Tertiary Collection of Student Information
TEQSA	Tertiary Education Quality & Standards Agency
VET	Vocational Education & Training
VDS	VET Data Streamlining
VSL	VET Student Loans

[ITECA Reference: N4.8.7]



The Independent Tertiary Education Council Australia (ITECA) is the peak body representing independent providers and stakeholders in the skills training, higher education, and vocational training sectors.

ITECA members are united, informed, and influential.

Members come together, through ITECA, to create an environment in which providers can offer students and their employers the quality outcomes they are looking for.

If you're interested in working with others that share your commitment to quality in order to improve the reputation of the independent tertiary education sector, get involved in ITECA today.

www.iteca.edu.au

ITECA Nationwide
t: 1300 421 017
f: 1300 421 018

ITECA National Office
a: GPO Box 450, Canberra, ACT, 2601
e: national.office@iteca.edu.au

ITECA Capital Territory
a: GPO Box 450, Canberra, ACT, 2601
e: act@iteca.edu.au

ITECA New South Wales
a: GPO Box 1493, Sydney, NSW, 2001
e: nsw@iteca.edu.au

ITECA Northern Territory
a: GPO Box 1755, Darwin, NT, 0801
e: nt@iteca.edu.au

ITECA Queensland
a: GPO Box 1182, Brisbane, QLD, 4001
e: qld@iteca.edu.au

ITECA South Australia
a: GPO 1547, Adelaide, SA, 5001
e: sa@iteca.edu.au

ITECA Tasmania
a: GPO Box 411, Hobart, TAS, 7001
e: tas@iteca.edu.au

ITECA Victoria
a: GPO Box 1939, Melbourne, VIC, 3001
e: vic@iteca.edu.au

ITECA Western Australia
a: PO Box Z5349 St George Tc, Perth, WA, 6831
e: wa@iteca.edu.au

Understanding
Skills Training & Higher Education

2022 ITECA State Of The Sector Report

The role of independent skills training and higher education
providers in developing Australia's workforce

October 2022



ITEC23 Conference




7-9 June 2023 ■ Sofitel Broadbeach
Queensland

Collaboration Driving Excellence The Business Of Independent Tertiary Education

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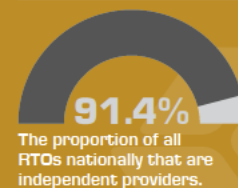
-  Skills Training
-  Higher Education
-  International Education

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RTOs By By Type Nationally



Ref: 2021 NCVER Databuilder



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2022 ITECA State Of The Sector Review
Independent Tertiary Education Council Australia
ABN 63 054 953 758

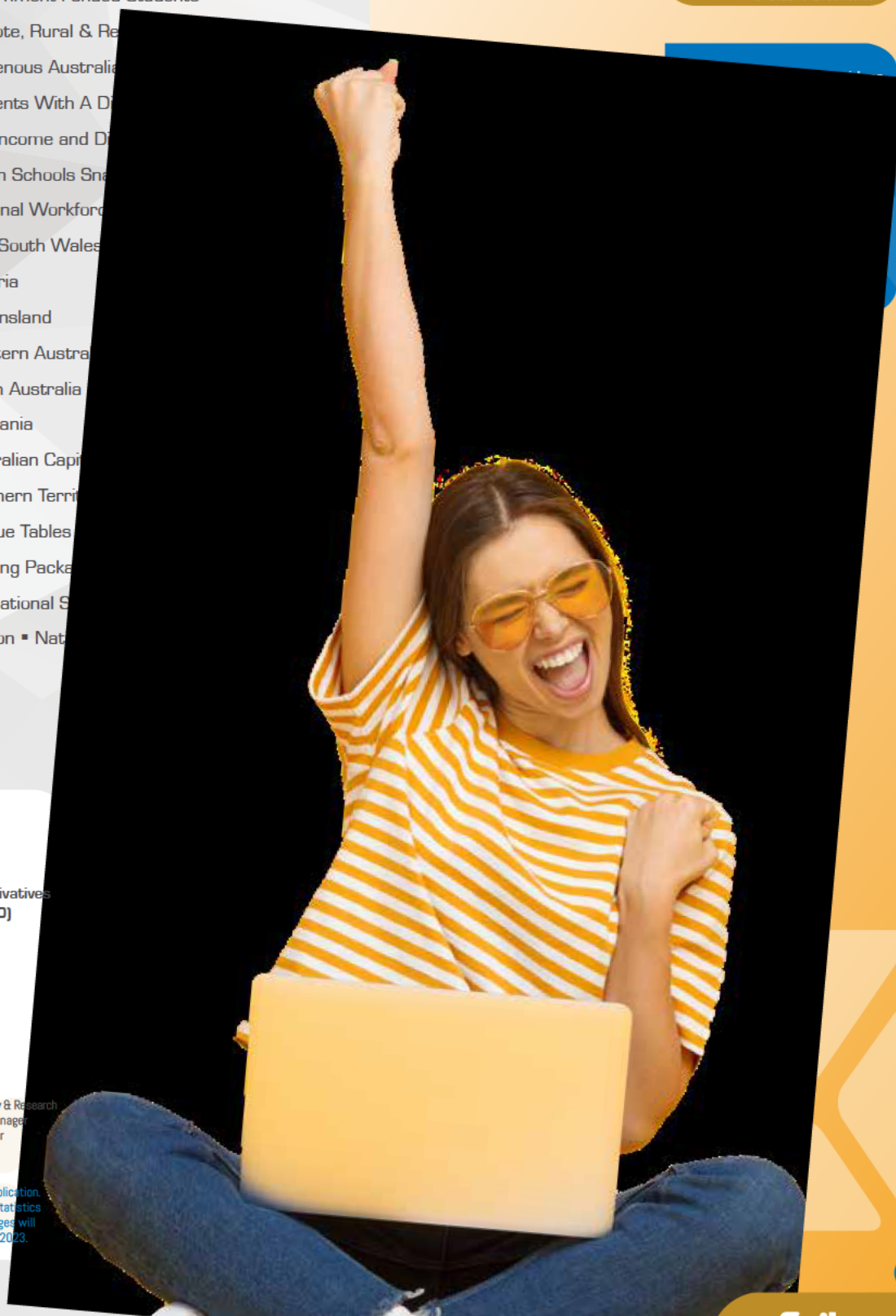
a: GPO Box 450, Canberra, ACT, 2601
t: 1300 421 017 f: 1300 421 018
e: policy@iteca.edu.au

Project Team:

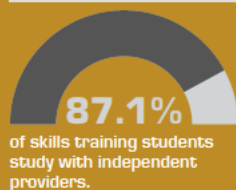
Troy Williams ITECA Chief Executive
Felix Pirie ITECA Deputy Chief Executive - Policy & Research
Alex Knoop ITECA State Government Policy Manager
Duncan Wade ITECA Communications Coordinator

Data Timing Guidance:

The data in this report is current at the time of publication.
Subsequent research and release of government statistics
may indicate different outcomes. Any such changes will
be identified in the next edition due in November 2023.

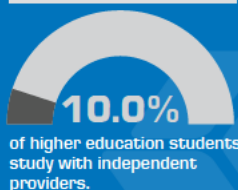


Skills Training Student Numbers



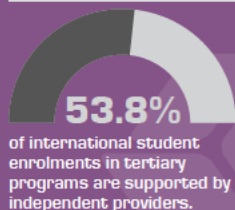
NCVER Government Funding of VET 2020

Higher Education Student Numbers



2021 NCVER Databuilder

International Educational Student Numbers



2021 Department of Education

An Introduction

2022 STATE OF THE SECTOR REVIEW

As businesses and governments tackle skills shortages across the Australian economy, they can look with confidence at the contribution of the nation's independent skills training and higher education providers. Collectively, these providers support 65% of the 5.9 million students in tertiary education with extraordinary levels of employer and student satisfaction.

The Government data referenced in this report makes clear that it is independent Registered Training Organisations (RTOs) that are the mainstay of the nation's skills training sector. They are the primary providers of quality skills training and support 87.1% of all students in skills training.

Skills training is the pathway to work and here, independent RTOs do the heavy lifting supporting Indigenous Australians (75.7% of students), students with disabilities (70.0% of students) and students from low-income and disadvantaged backgrounds (84.7% of students). Similarly, independent RTOs offer a diverse range of students across remote, rural and regional areas to gain critical qualifications (85.4% of students).

That students and employers clearly prefer independent RTOs is evidenced by key metrics of employer and student satisfaction. However, the greatest signal is the total number of students in skills training. Over 2020 and 2021, right in the middle of the Covid-19 pandemic, the number of students with independent RTOs rose by 423,890 (to 3,745,925), whereas the number of students with public providers actually fell by 14,735 (to 853,905).

Australians can also look with confidence at the contribution of independent higher education providers too. These enjoyed an 18.2% increase in enrolments over the four years covered in this report (2017 to 2020), compared to 6.1% for public providers. Students with independent higher education providers also expressed high levels of satisfaction that lead on key measures including skills development, learner engagement, teaching quality, plus the quality of their entire education experience. Notably, independent higher education providers lead on the key metric of overall employer satisfaction.

The data in this report comes at a critical time as governments reassess student subsidies and loan programs. It highlights the need to place students at the heart of the tertiary education system and to empower them with the ability to study with the provider of their choice, whether it is a quality independent provider or a public provider. As the recent Productivity Commission report entitled *5 Year Productivity Enquiry – From Learning To Growth* said "students appear to make good choices of their own volition. They have the best information about their own abilities and interests, making them well placed to make decisions about what they will enjoy – and benefit – from studying." This is a powerful argument in support of student choice.

As a nation, we need to put students at the heart of the tertiary education system. If these students choose to study with an independent skills training or higher education provider, they should be backed by government in making this decision. This report clearly highlights the need to reorient government funding of tertiary education programs so that student choice is the primary determinant empowering students with the ability to study with the provider of their choice.

The Independent Tertiary Education Council Australia (ITECA), with the great support of our members, offers thought leadership in the design and administration of the nation's skills training, higher education and international education sectors. This report is critical to this task and highlights why independent tertiary education is great for students, and great for Australia.

Troy Williams FIML MAICD
ITECA Chief Executive

Felix Pirie
ITECA Deputy Chief Executive – Policy & Research

Canberra, October 2022

Australia's Independent Tertiary Education Sector

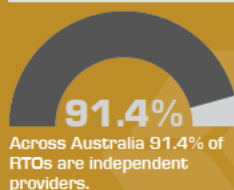
This report highlights data for the independent **skills training sector**, which includes RTOs that are for-profit, not-for-profit, industry and professional associations, plus community colleges. Public providers include both government TAFE colleges and dual-sector, public universities, the latter offering both higher education and skills training programs.

Independent **higher education** providers include Universities, University Colleges and Australian Institute of Higher Education, reflecting the different categorisation of providers under the Higher Education Threshold Standards. Public higher education providers include Universities and government TAFE colleges.

The ITECA membership includes independent skills training and higher education providers across the country.

NATIONAL SNAPSHOT SKILLS TRAINING

RTOs By Type Nationally



Australia's Skills Training Sector

Total Population:	25,739,256
Registered Training Organisations:	4,093 (3,742 Independent Providers)
Total Students:	4,299,555
% Of Working Age Pop As Skills Students:	25.2%
Students With Independent Providers:	3,743,295
% Students With Independent Providers:	87.1%
Skills Funding Total:	\$5,369.1 Million
Skills Funding To Independent Sector:	\$1,181.5 Million (22.0%)

Ref: 2021 NCVER Databuilder; 2021 ABS Population statistics; NCVER Government Funding of VET 2020

Australia Student Satisfaction

Achieved main reason for doing the training		
PRIV.	85.6%	
TAFE	83.8%	
Employed after training		
PRIV.	74.6%	
TAFE	70.3%	
Satisfied with the learning resources		
PRIV.	84.4%	
TAFE	82.5%	
Satisfied with the training overall		
PRIV.	89.1%	
TAFE	89.3%	

Ref: 2021 NCVER Databuilder

Skills Training Sector

SKILLS SNAPSHOT

As noted in the *Expert Review of Australia's Vocational Education and Training Sector* presented to the Australian Government in 2019, the skills training sector has been one of the key pillars of Australia's economic success story. Generations of tradespeople and skilled workers have successfully developed their skills and knowledge in a practical work-based learning environment. The skills training sector's strength is the diversity of Registered Training Organisations (RTOs) of all types. Continued success can be found in governments maintaining policy settings that support a viable and robust system of public, private and not-for-profit providers, with contestability in skills training markets, to ensure high quality training and student choice.

The Independent Skills Training Sector

Associations & Professional Bodies:

Typically a not-for-profit body that represents the interests of its members that may be companies (industry associations) or individuals (professions)

Community-Based Education:

A not-for-profit, community-based organisation with a primary focus on adult education. Community-based adult education delivers courses relating to leisure, personal and community development, employment skills, preparation for skills training and nationally recognised programs of study.

Private:

A privately owned training organisation (e.g. a company).

Enterprise:

An enterprise, or the training function or department of an enterprise, is registered to provide nationally accredited training

The Australian skills training sector is a diverse and vibrant mix of regulated entities across all states and territories and provider types. While the more than 91% of RTOs are in the independent sector, there are also valued contributions made to the skills environment from the public system in all jurisdictions.

The Public Skills Training Sector

A public provider includes Technical And Further Education (TAFE) institutes, universities (that deliver skills training programs) or similar public institutions (e.g. polytechnics), created or recognised by an Act of parliament.

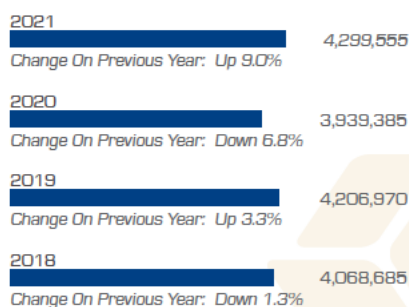
The Schools Skills Training Sector

A school is established or recognised under an Act of parliament for the purpose of providing courses of instruction in preschool, primary or secondary education. These may be either government (public), independent or religious schools.

As the government data in this report demonstrates, it is critical that students are at the heart of the skills training system. They should have the right to study with the provider of their choice, whether this be a quality independent provider or a public institution.

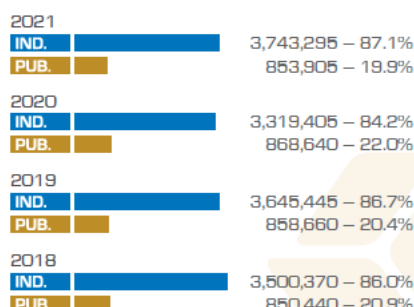
When it comes to providing Australian businesses with the skills needed to support a growing economy, it is independent RTOs that do the heavy lifting. This is clear based on the preferences of students and employers for the training delivered by independent RTOs. When it comes to qualification enrolments, independent providers are also doing to majority of the skills training.

Australia VET Student Numbers Total



Ref: 2021 NCVER Databuilder

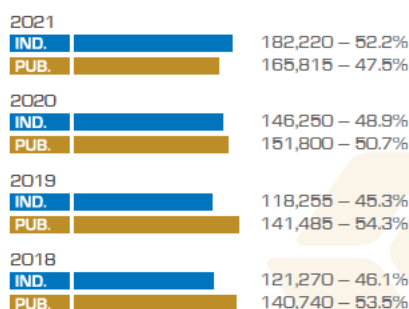
Australia VET Students: By Provider Type



Ref: 2021 NCVER Databuilder

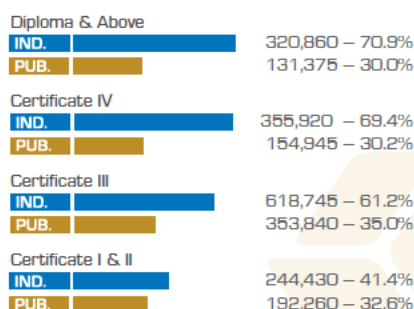
With around 71% of all enrolments in Diploma and above and over 69% at Certificate IV, or more than 676,000 enrolments, the independent sector is crucial when it comes to working closely with industry to boost Australia's productive capacity. At lower levels of the Australian Qualifications Framework, schools also play a strong role, supporting around 1 in 5 enrolments across Certificates I and II.

Australia Apprentices & Trainees: By Provider Type



Ref: 2021 NCVER Databuilder

Australia Qualification Enrolments: By Provider Type



Ref: 2021 NCVER Databuilder

Despite the consistent performance of the independent skills training sector in supporting the majority of students, this is not matched by government investment. Between 2017 - 2020 government investment to support skills delivery for students at independent RTOs has declined 10% nationally, while it has increased more than 20% at public providers.

Australia Total Funding For Skills Delivery



Includes Australian & State / Territory Government Funding

NCVER Government Funding of VET 2020

Australia Funding to Independents for Skills Delivery



Includes Australian & State / Territory Government Funding

NCVER Government Funding of VET 2020



Rural, Regional & Remote Students

85.4% of students in rural, remote and regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder



Indigenous Students

75.7% of Indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

70.0% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Disadvantaged Background Students

84.7% of students disadvantaged backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Employer Satisfaction

NATIONAL SKILLS SNAPSHOT

When employers, unions, and government came together at the Jobs and Skills Summit convened in Parliament House on 1st and 2nd September 2022, there was a strong focus on building a bigger, better trained, and more productive workforce. The Independent Tertiary Education Council Australia (ITECA) attended the summit and noted the strong interest of employers in a skills training system that is responsive to the needs of business and which produces job-ready graduates.

When it comes to supporting employers access the next generation of skilled and educated workers, it's clear that independent RTOs deliver the best outcomes. A major contributing factor is the ability of independent RTOs to be flexible in meeting the changing industry-driven needs of employers as reflected in government data.

National Skills Training Snapshot

Employer Satisfaction - Nat. Recognised Training

Employer Overall Satisfaction With Training

TAFE	80.8%
PRIV	91.1%
ASSC †	90.3%
OTH ‡	83.1%

Employer Overall Satisfaction - Flexibility Of The Provider

TAFE	80.5%
PRIV	89.2%
ASSC †	93.5%
OTH ‡	81.7%

† Association & Professional Bodies (Ind.) ‡ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

Unsurprisingly, industry associations or professional bodies (ie: ASSC on graph above) lead on the key metrics of the relevance of skills taught and the flexibility of the skills training provider in meeting employer's needs. This is because these skills training providers are focussed on supporting the needs of their members – the employers. Private providers score well on employer measures of satisfaction including the relevance of skills taught, cost-effectiveness of training, the flexibility of meeting employer needs and the trainers knowledge of the industry.

Employer Overall Satisfaction - Vocational Skills

74.3% of employers with jobs that required vocational qualifications were satisfied with training as a way of meeting their skill needs and only 9.8% were dissatisfied;

78.7% of employers using nationally accredited training as a way of meeting their skills needs were satisfied while 7% were dissatisfied.

83.5% of employers using unaccredited training as a way of meeting their skills needs were satisfied, and only 4.8% were dissatisfied.

In terms of determining funding priorities, it is incumbent upon governments to consider its own data on employer satisfaction and back students studying with independent RTOs.

National Skills Training Snapshot

Employer Satisfaction - Relevance & Knowledge

Trainers Knowledge & Experience

TAFE	82.7%
PRIV	90.8%
ASSC	95.6%
OTH ‡	81.4%

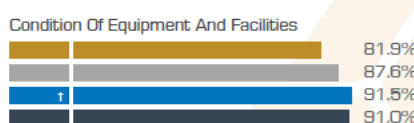
Relevance of Skills Taught

TAFE	84.5%
PRIV	92.4%
ASSC †	93.9%
OTH ‡	86.6%

† Association & Professional Bodies (Ind.) ‡ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

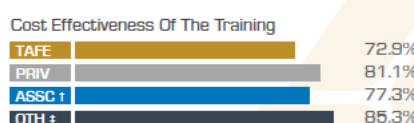
Of interest is that independent skills training providers are ranked highest by employers on the condition of equipment and facilities, with public TAFE colleges achieving the lowest level of satisfaction on this measure despite the many hundreds of millions in taxpayer funds spent each year on new TAFE facilities and their upkeep. Based on surveys of employer satisfaction, the heavy investment by taxpayers in public TAFE colleges does not translate into cost-effective training for employers, nor the meeting of employer needs through the trainers' knowledge of industry.

National Skills Training Snapshot Employer Satisfaction - Facilities & Equip



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

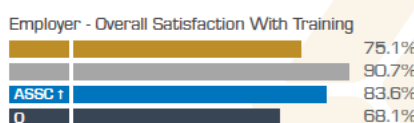
National Skills Training Snapshot Employer Satisfaction - Cost Effectiveness



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

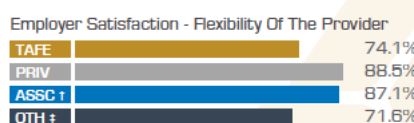
A focus of both government and employers is on the support provided to apprentices and trainees; here too, independent skills training providers lead on key measures of employer satisfaction.

National Skills Training Snapshot Employer Satisfaction - App & Trainees



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

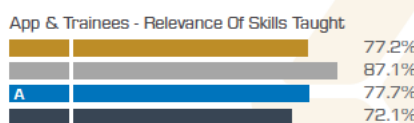
National Skills Training Snapshot Employer Satisfaction - Flexibility



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

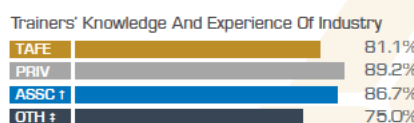
Perhaps more than most types of skills training, the support offered to apprentices and trainees is clearly occupation focussed, with the need for RTOs to ensure that what's being taught is relevant and that trainers have the ability to offer students contemporary knowledge.

National Skills Training Snapshot Employer Satisfaction - Relevance of Skills



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

National Skills Training Snapshot Employer Satisfaction - Trainers Knowledge



↑ Association & Professional Bodies (Ind.) ↓ Other Providers (Ind.)
Source: NCVER Employers' use and views of the VET system 2021.

As the Australian Government negotiates a new skills funding agreement with its state and territory counterparts, it's imperative that this be undertaken to ensure that the skills training system best supports students and employers. In this context, it is entirely appropriate that funds be provided to students that, with the backing of their employer, choose to study with an independent RTO, it's an arrangement that puts students at the heart of the skills training system.

Government–Funded Students

NATIONAL SKILLS TRAINING

Data from the National Centre for Vocational Education Research (NCVER) show that in 2021, less than one-third of all students in skills training were in a government-funded place. While there were around 4.3 million students in skills training in 2021, only 1,358,705 (31.6%* - see note at the bottom of next page) were able to undertake their training with government support. While the 13.6% increase in government-funded students over 2018-2021 outstrips the 5.7% increase in total student numbers, the levels of government funding support for students remains far too low.

National Skills Training Snapshot Total Government Funded Students

2021	1,358,705
Change On Previous Year: Up 4.5%	
2020	1,300,525
Change On Previous Year: Up 4.3%	
2019	1,246,355
Change On Previous Year: Up 4.2%	
2018	1,195,845
Change On Previous Year: Down 2.5%	

Ref: 2021 NCVER Databuilder

Of these 1.36m students in government-supported training in 2021, 45.5% were training with an independent Registered Training Organisation (RTO). There are, of course variations by jurisdiction with 56% of government-supported students in Queensland studying with an independent RTO, but only 37.1% in NSW and 33.5% in the ACT with an independent RTO.

It is notable that state and territory governments have a strong preference for certain types of training when investing in training in their jurisdictions.

2021 Students in Government-funded places (%)

■ Training package qualifications	58.5%
■ Accredited qualifications	71.1%
■ Training package skill sets	44.1%
■ Accredited courses	39.7%
■ Subjects not delivered as part of a nationally recognised program	5.8%

Nationally in 2021, of those students in a training package qualification, 58.5% were in a government-funded place, while of those students in a training package skill set, around 44% were in a government-funded place. The vast number of students undertook subjects on a fee-for-service basis that were not delivered as part of a nationally recognised program (around 60% of all students).

Governments across Australia have a clear preference for the public provision of skills training. It is equally clear, however, that this preference does not deliver optimal outcomes for the

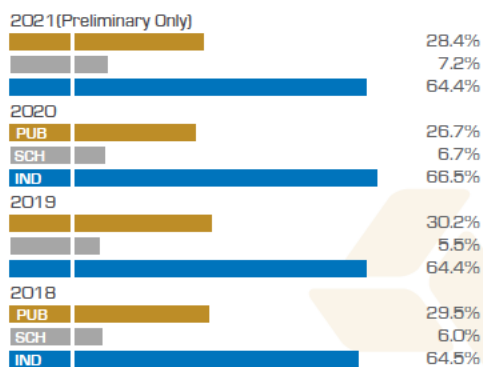
participants of the training system or those who rely on it. As students and employers rely so heavily on the independent skills training sector, and while 45.5% of the government-funded students are at independent RTOs, the number of completions delivered by those independent RTOs are greater than expected, comprising almost two-thirds of government-funded completions in 2021. This is where the independent sector does the heavy lifting.

It is important to appreciate that it can take time for students to commence and complete a qualification. The most recent actual completion data from the NCVER are from those who commenced their qualifications in 2017. For these students who commenced their training in a government-funded place in 2017 at a private RTO, completion rates are 12.8% higher than for TAFE. Further, completion rates for government-funded training at a private RTO are higher than for TAFE at every qualification level.

The Australian Government has nominated priority areas for the skills sector to deliver quality graduates; each of these are disciplines in which the independent sector has a track record of delivering the majority of completions for government-funded students.

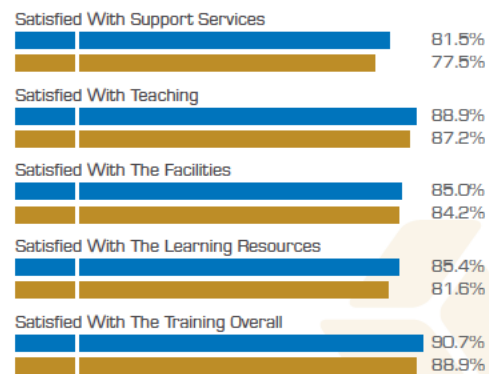
* In calculating the number of government-funded students, this Report captures data on students reported by state and territory training authorities, but also broadens the scope to incorporate data on those reported directly to NCVER by training providers that deliver to students supported by the Commonwealth. These students are not reported through the state or territory training authorities, and this results in a more comprehensive picture and slightly higher government-funded student numbers.

National Skills Training Snapshot Government-Funded Students - Program Completions By Provider (%)



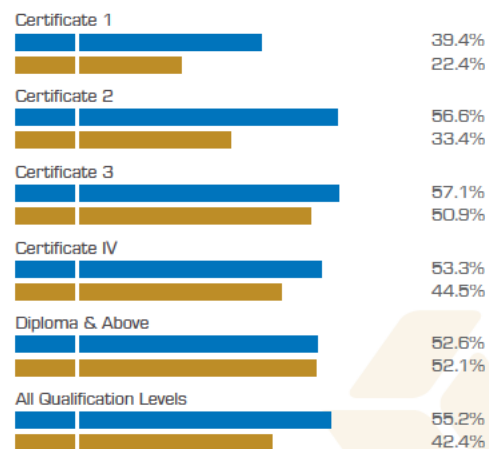
Ref: 2021 NCVER Databuilder

National Skills Training Snapshot Government-Funded Students - Student Satisfaction



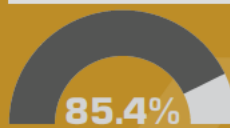
Ref: 2021 NCVER Databuilder

National Skills Training Snapshot Government-Funded Students - Completion Rate (%) By Qualification Level



Ref: 2021 NCVER Databuilder

Remote, Rural & Regional VET Sector Snapshot



Skills training students in remote, rural & regional areas train with independent education providers

Ref: 2021 NCVER DataBuilder

National Snapshot

Remote, Rural & Regional Enrolments

Community Services (CHC)

81,375 Enrolments with Indep. RTOs
(64.6% of total with Indep. RTOs)

Const., Plumb. & Serv. Int. Framework (BCF, BCG, BCP, CPC)

23,360 Enrolments with Indep. RTOs
(46.3% of total with Indep. RTOs)

Resources and Infrastructure (BCC, DRT, MNC, MNM, MNQ, RII)

34,145 Enrolments with Indep. RTOs
(90.7% of total with Indep. RTOs)

Retail Services (SIR, WRP, WRR, WRW)

11,200 Enrolments with Indep. RTOs
(86.5% of total with Indep. RTOs)

Tourism, Travel and Hospitality (SIT, THH, THT)

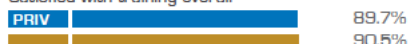
21,065 Enrolments with Indep. RTOs
(50.8% of total with Indep. RTOs)

Ref: 2021 NCVER DataBuilder

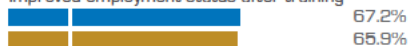
Inner & Outer Regional Students

Student Satisfaction Metrics

Satisfied with training overall



Improved employment status after training



Achieved main reason for doing training



Satisfied with learning resources



Recommend training provider



Ref: 2021 NCVER DataBuilder

Remote, Rural & Regional

NATIONAL SKILLS TRAINING

Across Federal, state and territory governments, there is a shared commitment to the economic empowerment of people in remote, rural and regional areas. Key to this endeavour is ensuring that there is a local workforce with the opportunities to upskill, reskill or skill for the first time without leaving their region.

Some 85.4% of the more than 1.24 million students undertaking skills training in remote, rural and regional Australia choose to study with an independent provider. The table below shows the number of students in skills training in remote, rural and regional areas in each jurisdiction training with independent providers, and the proportion this represents of the total in these areas.

Independent Providers

Remote, Rural & Regional Students

■ New South Wales	270,095	(80.6%)
■ Victoria ¹	194,340	(80.3%)
■ Queensland	349,125	(91.3%)
■ South Australia	66,020	(92.2%)
■ Western Australia	61,930	(79.1%)
■ Tasmania	77,710	(89.5%)
■ Northern Territory ²	13,460	(84.0%)
■ Australian Capital Territory ³	75	(78.9%)
■ Nationally	1,061,295	(85.4%)

¹ - Inner and outer regional only ² - Remote and very remote only ³ - Inner regional only

The 'Jobs And Skills Summit' convened by the Australian Government in September 2022 noted the criticality of addressing skills shortages in regional Australia. As policy makers consider options, it's clear that the solution can be found in approaches that recognise the clear preference of students to study with independent skills training providers.

Independent Providers

Remote, Rural & Regional Apprentices & Trainees

Some 48.0% of apprentices and trainees in remote, rural and regional areas study with independent RTOs, that's 60,975 students. [Ref: NCVER 2021 DataBuilder]

When it comes to supporting remote, rural and regional students to get into a job and secure long-term employment, private RTOs achieve great outcomes. On the metric of improving employment status after training, 67.2% of students were satisfied with private RTOs in remote, rural and regional areas.

Independent Providers

Female Remote, Rural & Regional Students

Some 83.8% of female students in remote, rural and regional areas study with independent RTOs, that's 464,160 students. [Ref: NCVER 2021 DataBuilder]

Private RTOs can be rightly proud of their reputation for excellence when it comes to supporting remote, rural and regional students, with 89.7% of students being satisfied with the overall quality of their training.

Indigenous Australians

NATIONAL SKILLS TRAINING

Governments at all levels have a strong commitment to supporting Indigenous Australians and creating pathways to further education and employment. This is enshrined in the Closing the Gap National Agreement, where Federal, state, and territory governments have committed to increasing the proportion of Indigenous Australians who have completed a tertiary qualification (Certificate III and above) to 70% by 2031. Independent skills training providers will play a key role in meeting this commitment.

More than three-quarters of all Indigenous students in skills training across Australia choose to study with an independent skills training provider. The table below shows total number of Indigenous Australians in skills training with independent providers alongside the proportion that number represents of the total number of Indigenous Australians in training in each jurisdiction.

Independent Providers Indigenous Students

▪ New South Wales	35,650	(66.2%)
▪ Victoria	10,545	(74.2%)
▪ Queensland	38,555	(85.2%)
▪ South Australia	6,260	(80.7%)
▪ Western Australia	13,585	(80.7%)
▪ Tasmania	3,255	(81.5%)
▪ Northern Territory	6,010	(67.5%)
▪ Australian Capital Territory	1,015	(65.5%)
▪ Nationally	117,950	(75.7%)

Throughout the pandemic, Indigenous students, like all student cohorts, valued access to the high-quality training offered by independent providers, and the data reflects this, with independent providers supporting 75.7% of Indigenous students across Australia. This represents an increase of around 13,450 students at independent RTOs, or 12.9%, over 2020-21 alone.

As part of the Closing the Gap National Agreement, governments have committed to increasing the proportion of Indigenous people aged 25-64 who are employed to 62%. It is therefore significant that 59.6% of Indigenous students who studied with private RTOs reported that their employment status had improved as a direct result of their training.

Independent Providers Female Indigenous Students

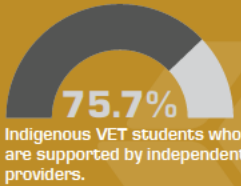
There are 57,565 female Indigenous students studying with independent RTOs across Australia; these students account for 73.8% of the total in the sector

[Ref: NCVET 2021 DataBuilder]

The reputation that private providers have in supporting Indigenous Australians is backed by student data. 91.0% of Indigenous students are satisfied with the overall quality of the training delivered by private RTOs.

In addition, 86.6% of Indigenous students nationwide would recommend their private training provider.

Indigenous Australians VET Sector Snapshot



Ref: 2021 NCVET Databuilder

National Snapshot

Indigenous Student Enrolments

Business Services (BSA, BSB)

7,650 Enrolments with Indep. RTOs
(55.2 % of total with Indep. RTOs)

Community Services (CHC)

12,790 Enrolments with Indep. RTOs
(51.5% of total with Indep. RTOs)

Retail Services (SIR, WRP, WRR, WRW)

2,220 Enrolments with Indep. RTOs
(81.6% of total with Indep. RTOs)

Tourism, Travel and Hospitality (SIT, THH, THT)

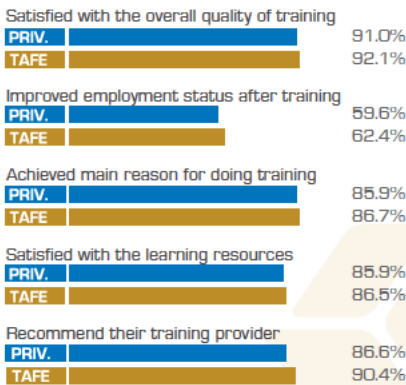
4,280 Enrolments with Indep. RTOs
(48.7% of total with Indep. RTOs)

Transport and Logistics (TDT, TLI)

2,905 Enrolments with Indep. RTOs
(93.3% of total with Indep. RTOs)

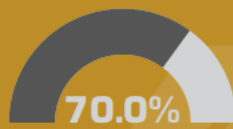
Ref: 2021 NCVET Databuilder

Indigenous Australian Student Satisfaction Metrics



Ref: 2021 NCVET Databuilder

Students With Disabilities VET Sector Snapshot



VET students with disabilities are supported by independent providers.

Ref: 2021 NCVER Databuilder

National Snapshot

Students w. Disabilities Enrolments

Business Services

(BSA, BSB)

12,000 Enrolments with Indep. RTOs
(63.9% of total with Indep. RTOs)

Community Services

(CHC)

21,110 Enrolments with Indep. RTOs
(58.0% of total with Indep. RTOs)

Foundation Skills

(FSK)

3,095 Enrolments with Indep. RTOs
(44.7% of total with Indep. RTOs)

Retail Services

(S R, WRP, WRR, WRW)

3,510 Enrolments with Indep. RTOs
(85.4% of total with Indep. RTOs)

Transport and Logistics

(TDT, TLI)

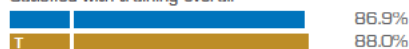
3,940 Enrolments with Indep. RTOs
(94.1% of total with Indep. RTOs)

Ref: 2021 NCVER Databuilder

Students With Disabilities

Student Satisfaction Metrics

Satisfied with training overall



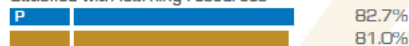
Improved employment status after training



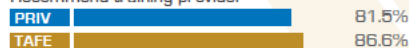
Achieved main reason for doing training



Satisfied with learning resources



Recommend training provider



Ref: 2021 NCVER Databuilder

Students With Disabilities

NATIONAL SKILLS TRAINING

Through the Australian Government's 'Australia's Disability Strategy: 2021-2031', there is a strong commitment to increasing employment and financial security as well as improving pathways to participate in accessible and inclusive lifelong learning for people with disabilities. Independent skills training will play a key role in achieving this objective, particularly given that independent providers support 70.0% of students with disabilities engaged in skills training nationwide.

The number of students with a disability in skills training with independent RTOs and the proportion this represents of the total in each jurisdiction are shown below.

Independent Providers

Students With Disabilities

▪ New South Wales	31,535	(57.3%)
▪ Victoria	28,050	(66.8%)
▪ Queensland	33,810	(83.8%)
▪ South Australia	11,415	(85.2%)
▪ Western Australia	12,140	(73.2%)
▪ Tasmania	3,500	(70.1%)
▪ Northern Territory	1,155	(73.1%)
▪ Australian Capital Territory	2,120	(57.5%)
▪ Nationally	126,950	(70.0%)

Private RTOs play a critical role in supporting students with disabilities in securing long-term employment outcomes. At private RTOs across Australia, 53.8% of students with disabilities were employed after training. Significantly, 45.7% of students reported that their employment status had improved after training with their private RTO.

Students with disabilities have endorsed the work and investment by private RTOs in delivering support services to their students, with 78.7% of students reporting that they were satisfied with the support services they received.

Independent Providers

Female Students With Disabilities

Some 69.5% of female students with disabilities study with independent RTOs, that's 65,720 students.

[Ref: NCVER 2021 DataBuilder]

In addition, 86.9% of students with disabilities at private RTOs were satisfied with the overall quality of their training. Furthermore, 81.5% of students would recommend their training provider.

This continued commitment to support students with disabilities to engage and complete their training has seen students with disabilities continue to trust independent providers, and the data reflects this fact, with the number of students increasing by 9.3% in 2021 on 2020 levels.

Low Income & Disadvantaged Students

NATIONAL SKILLS TRAINING

The economic empowerment and workforce participation of people from low-income and disadvantaged (low SES) backgrounds have been identified as an area of importance by governments at all levels. Access to skills training is one of the keys in driving this goal, with all state and territory governments providing access to government-subsidised training as well as the national VET Student Loans program for higher-level qualifications. These programs assist students from low SES backgrounds by removing the economic barriers to training and helping them upskill, reskill or skill for the first time and secure employment.

Across Australia, independent providers support around 84.7% students from the lowest two socio-economic quintiles of economic disadvantage in skills training. That's more than 1.28 million students. The table below shows the total number of students in these circumstances in each jurisdiction with independent providers and the proportion this represents of the total for the jurisdiction.

Independent Providers

Low Income & Disadvantaged Students

▪ New South Wales	399,645	(79.2%)
▪ Victoria	260,525	(81.9%)
▪ Queensland	315,075	(89.6%)
▪ South Australia	133,120	(91.1%)
▪ Western Australia	99,960	(88.8%)
▪ Tasmania	46,760	(88.3%)
▪ Northern Territory	9,270	(81.0%)
▪ Australian Capital Territory	490	(80.3%)
▪ Nationally	1,280,950	(84.7%)

Independent skills training providers across Australia play a key role in supporting students from low SES backgrounds, with 84.7% of students studying with an independent provider.

The commitment by all governments to enable access to training has seen students increasingly engage with high-quality independent providers. This is clearly reflected in the data, with students with independent providers increasing by 14.8% in 2021 on 2020 levels.

Independent Providers

Low Socio-Economic Female Students

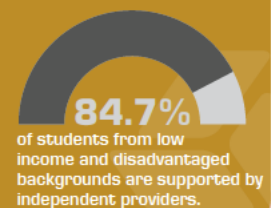
Some 82.6% of female students with from low socio-economic backgrounds study with independent RTOs, that's 592,095 students.

[Ref: NCVET 2021 DataBuilder]

On the key metric of improving their employment status, private RTOs achieved a 64.0% success rate amongst students from low SES backgrounds. On this metric, private RTOs outperform public TAFE colleges across the country, highlighting the value of the investment made by taxpayers in supporting students from low SES backgrounds to study with independent RTOs.

Students from low SES backgrounds also recognise the excellence of private RTOs, with 89.8% of students satisfied with the overall quality of the training and 85.2% of students saying they would recommend their training provider.

LSES Australians VET Sector Snapshot



Ref: 2021 NCVET Databuilder

National Snapshot

Low Socio-Economic Enrolments

Financial Services

(FNA, FNB, FNS)

11,000 Enrolments with Indep. RTOs
(54.2% of total with Indep. RTOs)

Foundation Skills

(FSK)

9,590 Enrolments with Indep. RTOs
(35.6% of total with Indep. RTOs)

Property Services

(CPP, PRD, PRM, PRS)

20,450 Enrolments with Indep. RTOs
(84.9% of total with Indep. RTOs)

Resources and Infrastructure

(BCC, DRT, MNC, MNM, MNQ, RII)

29,600 Enrolments with Indep. RTOs
(91.2% of total with Indep. RTOs)

Retail Services

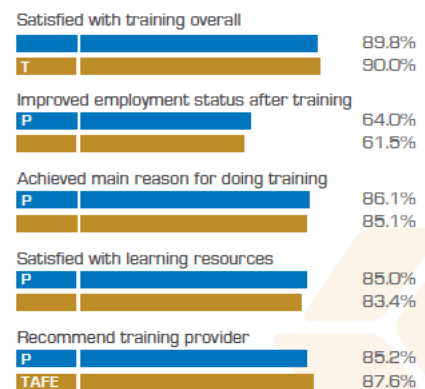
(SIR, WRP, WRR, WRW)

15,005 Enrolments with Indep. RTOs
(86.4% of total with Indep. RTOs)

Ref: 2021 NCVET Databuilder

Low Income & Disadvantaged Students

Student Satisfaction Metrics



Ref: 2021 NCVET Databuilder

VET In Schools

NATIONAL SKILLS TRAINING

Undertaking a skills training program as part of a students' school studies offers the opportunity to engage in nationally recognised training that is directly related to a skilled occupation via a qualification developed by industry.

One of the core benefits is the flexibility it offers to employers and students in building capability of the former and the skills of the latter at an early stage, often while they are considering a range of post-school options.

National Snapshot - VET In Schools

VETis Enrolments with Ind. Providers

Tourism, Travel and Hospitality (SIT, THH, THT)

20,535 Enrolments with Indep. RTOs
(39.1% of total with Indep. RTOs)

Sport, Fitness and Recreation (SIS, SRC, SRF, SRD, SRS)

34,190 Enrolments with Indep. RTOs
(80.1% of total with Indep. RTOs)

Business Services (BSA, BSB)

24,440 Enrolments with Indep. RTOs
(59.2% of total with Indep. RTOs)

Construction, Plumbing & Services Integrated Framework (BCF, BCG, BCP, CPC)

6,495 Enrolments with Indep. RTOs
(25.8% of total with Indep. RTOs)

Community Services (CHC)

13,400 Enrolments with Indep. RTOs
(63.2% of total with Indep. RTOs)

* = # of VETis enrolments with independent RTOs

* = % of all VETis enrolments in this TP that are with independent RTOs
Ref: 2021 NCVET Databuilder

Independent Providers - VET in Schools students

■ Western Australia ¹	5	(50.0%)
■ Victoria	24,895	(48.8%)
■ South Australia	4,070	(48.0%)
■ Queensland	37,125	(37.4%)
■ Northern Territory	720	(32.4%)
■ Tasmania	610	(22.0%)
■ New South Wales	4,615	(11.6%)
■ Australian Capital Territory	5	(0.02%)
■ Nationally	97,995	(39.0%)

In 2021, 116,940 young women undertook skills training while at school. That's 46.5% of the total number of students enrolled. The most significant portion of these young female students - 41.6% - undertook their skills training with an independent RTO.

The skills training programs undertaken in a schools context differ from those undertaken in a broader skills training context, with the most popular courses being in in tourism and hospitality, sport and fitness as well as business services.

Independent Providers - School Based Apprentices & Trainees

■ Western Australia ¹	-	(0.0%)
■ Victoria	1,955	(61.8%)
■ South Australia	830	(68.9%)
■ Queensland	9,710	(86.4%)
■ Northern Territory	30	(33.3%)
■ Tasmania	405	(100.0%)
■ New South Wales	765	(68.6%)
■ Australian Capital Territory	0	(0.0%)
■ Nationally	15,155	(73.9%)

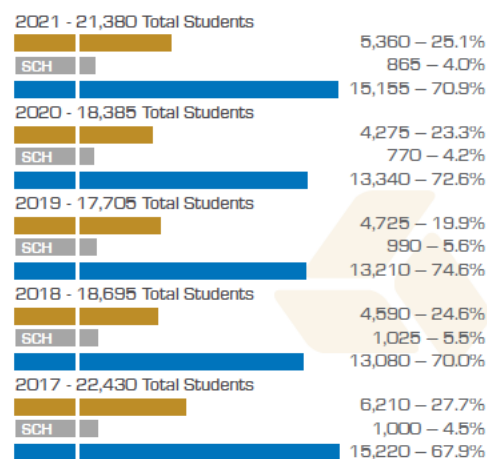
The ability for a school student to choose a school-based apprenticeship or traineeship has been cited by employers and students as a very important option in enhancing their future potential. Close to 74% of all students undertaking a school-based apprenticeship are supported by an independent provider and this proportion continues to remain high. Despite this, the overall numbers of students undertaking these crucial roles and accessing these choices are still lower than students or employers demand, most likely due to lack of information and incentives on offer.

Through the Covid-19 pandemic, there was a significant increase in the number of students engaging in skills training as

¹ - WA reporting on VET in Schools in WA changed from 2017, and were no longer recorded by NCVET.

National Snapshot - VET In Schools

Schools Based Apprentices & Trainees

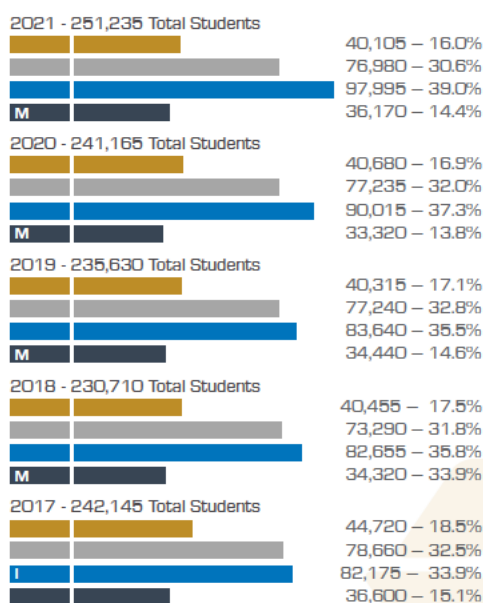


Ref: 2021 NCVET Databuilder

part of their school studies. By 2021 enrolments in these programs had increased by 8.9% nationally on the low experienced in 2018, and this was led by an 18.6% increase in those enrolments at independent providers. This has led to the independent sector again supporting the largest proportion of students, and having increased that proportion over the 2017-2021 period.

National Snapshot - VET In Schools

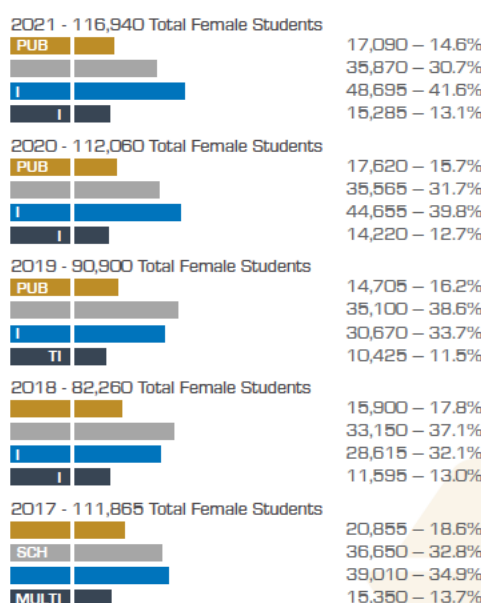
Total VETis Students By Provider Type*



* Studying at more than one provider. Ref: 2021 NCVET Databuilder

National Snapshot - VET In Schools

Total Female VETis Students By Provider Type*



* Studying at more than one provider. Ref: 2021 NCVET Databuilder

The difference between enrolments in a training package qualification and students numbers in a training package qualification is made clear in the data for VET in Schools (VETis). An example is found in Tourism and Hospitality where there were 10,765 VETis students in the Tourism, Travel and Hospitality training package with independent RTOs in 2021 and this translated to more than 20,500 program enrolments (previous page). Students engaged in a VETis program in the Health (HLT) training package with an independent RTO accounted for 44.3% of all students in that package and this grew more than 200% over 2017-2021. At the same time, VETis Students with independent RTOs studying Community Services (CHC) accounted for nearly 54% of all such students, a student cohort that grew 38.1% over this period. This demonstrates yet again the contribution that independent RTOs and students make to key areas of the economy.

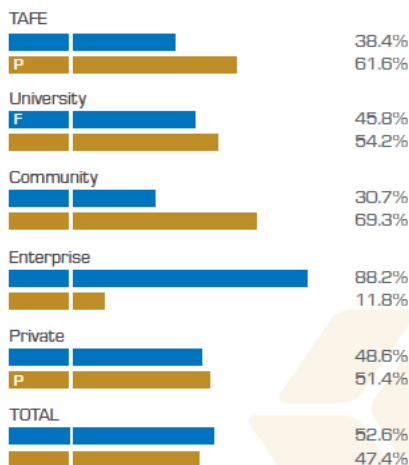
National Snapshot - VET In Schools

Key Training Packages - Students @ Independent Providers & % of Sector Total

	2021 #	2021%	Change '17-'21
■ Tourism, Travel and Hospitality (SIT, THH, THT)	10,765	32.8%	11.7%
■ Business Services (BSA, BSB)	17,025	54.5%	33.2%
■ Sport, Fitness and Recreation (SIS, SRC, SRF, SRO, SRS)	19,675	66.1%	10.2%
■ Creative Arts and Culture (CUA, CUE, CUF, CUS, CUV)	7,005	41.7%	-11.8%
■ Community Services (CHC)	8,300	53.8%	38.1%
■ Construction, Plumbing & Services Integrated Framework (BCF, BCG, BCP, CPC)	2,850	19.9%	9.8%
■ Health (HLT)	4,240	44.3%	226.2%
■ Agriculture, Horticulture and Conservation and Land Management (AGF, AGR, AHC, RTD, RTE, RTF, RUA, RUH)	3,255	34.8%	106.0%
■ Metal and Engineering (MEM)	2,720	31.2%	28.3%
■ Information and Communications Technology (ICA, ICT)	1,720	21.4%	-45.4%

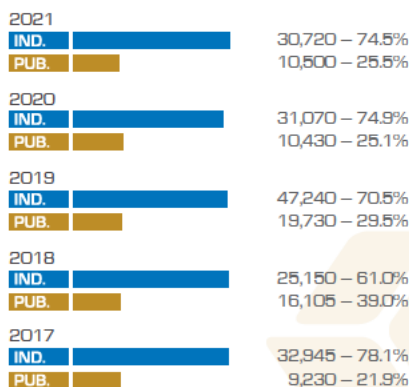
Ref: 2021 NCVET Databuilder

Training & Assessors By Employment Status
Full Time & Part Time Staff



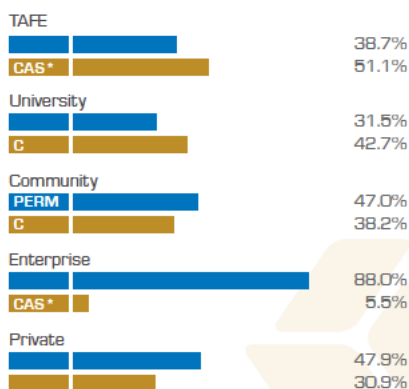
Australian VET Workforce Survey (2019)

Training & Education
Enrolments By Provider Type (BSZ, TAA, TAE)



Ref: 2021 NCVET Databuilder

Training & Assessors By Employment Status
Permanent & Casual / Sessional Staff



* Includes casual & sessional staff

Ref: 2021 NCVET Databuilder

Skills Training Workforce

NATIONAL SKILLS TRAINING

The Australian skills training workforce is a strong and resilient one, supporting around 4.3 million students across a huge range of disciplines, in both accredited and non-accredited training. A highly dedicated workforce of professional staff alongside trainers and assessors continued to deliver quality skills outcomes to an increasing number of students though the Covid-19 pandemic, including more students from diverse backgrounds.

The most recent government data on the Australian skills training workforce is derived from a survey which highlights the pre-pandemic state of the workforce. In 2019, there were 246,167 people working in the Australian skills training workforce across professional and trainer / assessor roles. Of these, 40.7%, or more than 100,000, were working with an independent provider; compared with just over 54,000 at public providers.

Vocational Education & Training Workforce

Public	54,330	(22.1%)
School RTOs	72,412	(29.4%)
Exempt ¹	19,279	(7.8%)
Independent	100,146	(40.7%)
TOTAL	246,167	

Just 39.6% of all trainers and assessors work at independent RTOs and they support the more than 87% of all students in skills training. Still, those trainers and assessors continue to deliver superior outcomes for students across Australia.

The trainer and assessor workforce across the independent sector is highly adaptable and flexible to the needs of students, and independent RTOs have a track record of recognising and looking after their workforce.

When it comes to employment status of the trainer and assessor workforce, a greater proportion of those in the independent sector are permanent employees when compared to those at TAFE or in university RTOs. Similarly, a lower proportion are casual / sessional employees and a higher proportion work on a full-time basis at private and enterprise RTOs than at TAFE or university RTOs. Community-based RTOs have a unique operating model with often unique circumstances and student cohorts which requires flexibility for the RTO and staff alike and this is reflected in these RTOs having the highest proportion of volunteers of any provider type.

It is independent RTOs that offer the most secure working environment, including the highest rates of secure employment in skills training.

¹ - Exempt RTOs are those that were exempted from reporting 2017 activity to the National VET Provider Collection.



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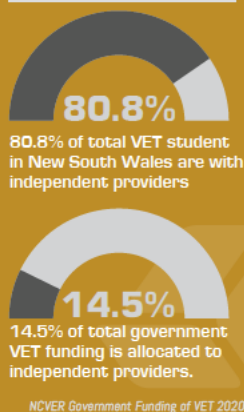
Independent Skills Training

Great For Students Great For Australia

SNAPSHOT BY JURISDICTION **SKILLS TRAINING**

Students & Funding

NSW State Snapshot



New South Wales

Skills Training Sector Size

Total Population:

8,189,266

National Rank: #1

Registered Training Organisations:

1,165 (All types)

National Rank: #2

Total Students:

1,139,955

National Rank: #2

% Working Age Pop As Skills Students:

21.0%

National Rank: #5

Students With Independent Providers:

921,585

National Rank: #1

% Students With Independent Providers:

80.8%

National Rank: #8

Skills Funding Total:

\$1,764.8M

National Rank: #1

Skills Funding To Independent Sector:

14.5% (\$256.6M)

National Rank: #5

Ref: 2021 NCVER Databuilder

New South Wales

SKILLS TRAINING

New South Wales' economy is service oriented, accounting for 46% of the nation's finance and insurance sector and 39% of the property and business sectors. Economic activity represents one-third of the nation's communications sector and also one-third of the manufacturing sector. Export-oriented industries include travel services, coal and coke, and the export of various metals.

Skills Funding Programs

The 'Smart and Skilled' program is the state government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 356 independent RTOs that receive state government funding to support students, of which 71 (19.9%) are headquartered outside the state.

The 'Smart and Skilled' training program is administered by Training Services NSW, a division of the state's Department of Education. Training Services. New South Wales has announced a broad contracting process for the 2023-24 financial year, with prospective RTOs able to apply for funding for the first time in 5 years.

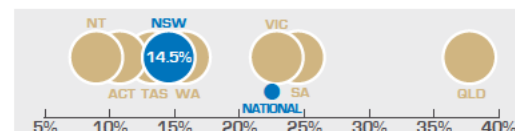
New South Wales has a 'one TAFE' operating model where each campus operates under the umbrella of the one brand.

Number Of Training Providers

- Independent – Private and associations 1028 RTOs
- Independent – Community 73 RTOs
- Independent – Enterprise 26 RTOs
- Public – Enterprise 21 RTOs
- Public – TAFE and universities 1 RTOs
- School – Non-government 14 RTOs
- School – Government 4 RTOs

Government data shows that New South Wales' total spending on vocational education and training is \$1,764.8 million of which 14.5% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is below the national figure of 22%.

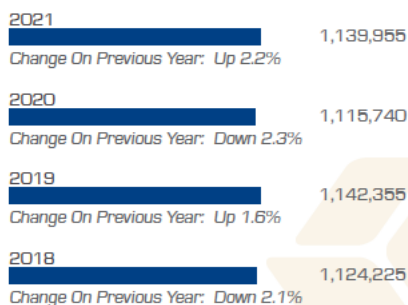
Proportion Of Training Provision Funding Attributed To Independent Providers



On the key measure of funding, New South Wales has a clear preference for funding its public TAFE sector, something that limits both a student's choice of course selection and training provider.

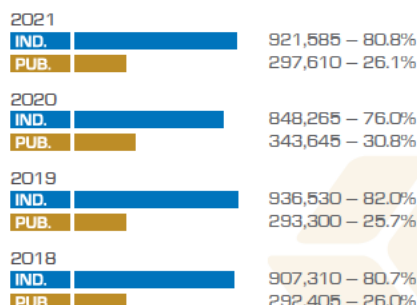
The trend in total student numbers across the sector in New South Wales has been broadly consistent with the national trend, with student numbers increasing. Independent providers have experienced strong growth up by 8.6% in 2021 on 2020 numbers, whilst student numbers at public providers decreased by 13.4% over the same period. Despite this, funding to independent providers declined by 5.2%, while funding to public providers increased by 63.0%.

New South Wales VET Students: Total



Ref: 2021 NCVER Databuilder

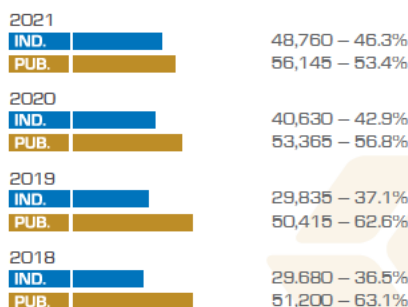
New South Wales VET Students: By Provider Type



Ref: 2021 NCVER Databuilder

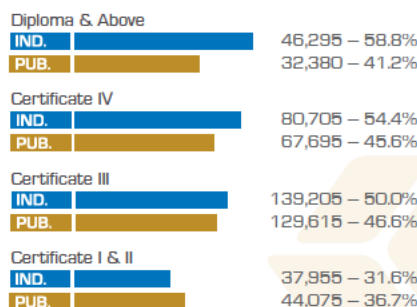
Between 2019 and 2021, there has been a significant increase in the number of apprentices and trainees across New South Wales, something that reflects a national trend and is directly attributed to two Australian Government initiatives, these being the 'Boosting Apprenticeship Commencements' wage subsidy and the related 'Completing Apprenticeship Commencements' wage subsidy.

New South Wales Apprentices & Trainees: By Provider Type



NCVER Government Funding of VET 2020

New South Wales Qualification Enrolments: By Provider Type



NCVER Government Funding of VET 2020

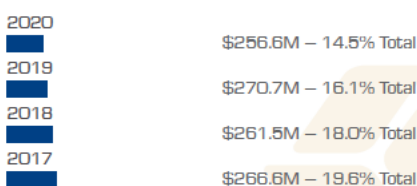
As is shown below, the New South Wales Government has increased its investment in skills training delivery by \$411 million over four years; however, funding to independent providers for delivery dropped by \$10 million over the same period.

New South Wales Total Funding For Skills Delivery



Ref: 2021 NCVER Databuilder

New South Wales Funding For Skills Delivery To Ind.



Ref: 2021 NCVER Databuilder



Remote, Rural & Regional Students

In NSW, 80.6% of students in rural, remote and regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder



Indigenous Students

In NSW, 66.2% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

In NSW, 57.3% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

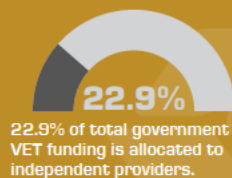
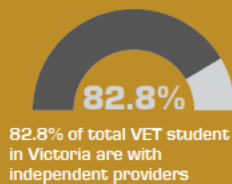


Disadvantaged Background Students

In NSW 79.2% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Students & Funding VIC State Snapshot



2021 NCVER Databuilder; NCVER Government Funding of VET 2020

Victoria

Skills Training Sector Size

Total Population:

6,649,159 National Rank: #2

Registered Training Organisations:

919 (All types) National Rank: #3

Total Students:

904,595 National Rank: #3

% Working Age Pop As Skills Students:

20.7% National Rank: #6

Students With Independent Providers:

749,070 National Rank: #3

% Students With Independent Providers:

82.8% National Rank: #6

Skills Funding Total:

\$1,344.1M National Rank: #2

Skills Funding To Independent Sector:

22.9% (\$305.7M) National Rank: #3

2021 NCVER Databuilder; 2021 ABS Population Statistics;
NCVER Government Funding of VET 2020

Victoria

SKILLS TRAINING

With Australia's second-largest level of Gross State Product, Victoria accounts for over 23% of the national economy. The State has a broad-based economy with well-developed manufacturing, primary and service sectors. International education services continue to be the largest export for Victoria, worth over \$10.5 billion and contributing 55,000 direct jobs in 2020.

Skills Funding Programs

The 'Skills First' program is the Victorian State Government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 278 independent RTOs that receive state government funding to support students, of which 10 (3.6%) are headquartered outside of the state.

The 'Skills First' training program is administered by the Department of Education and Training. There are very limited opportunities for new RTOs to become approved to deliver funding under the 'Skills First' program, with funding opened for the first time in five years in 2021. The Department has continued to utilise a limited Expression Of Interest (EOI) process, with 2022's EOI looking to address areas of skills need and shortfalls identified by the Victorian Skills Plan.

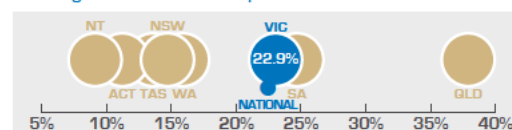
Victoria has the largest number of TAFE colleges in the country, with 12 TAFEs in Victoria. Each TAFE operates under a different name and brand.

Number Of Training Providers

Independent – Private and associations	759 RTOs
Independent – Community	70 RTOs
Independent – Enterprise	13 RTOs
Public – Enterprise	11 RTOs
Public – TAFE and universities	18 RTOs
School – Non-government	29 RTOs
School – Government	19 RTOs

Government data shows that Victoria's total spending on vocational education and training is \$1,344.1 million of which 22.9% was allocated to independent RTOs. As is highlighted by the chart below, this allocation marginally above to the national figure of 22.0%.

Proportion Of Training Provision Funding Attributed To Independent Providers

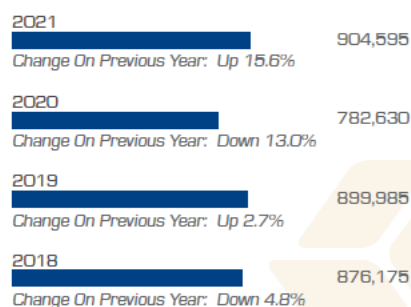


NCVER Government Funding of VET 2020

On the key measure of funding, Victoria has a clear preference for funding its public TAFE sector, something that limits both a student's choice of course selection and training provider.

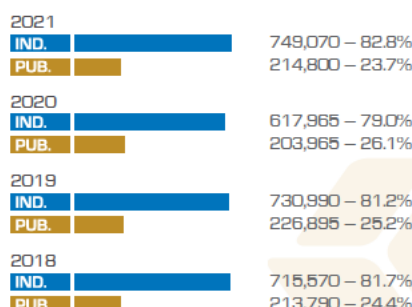
In Victoria, the trend in total student numbers across the sector has been broadly consistent with the national trend, with numbers increasing by 15.6% between 2020 and 2021. This equated to approximately 122,000 students driven by the independent sector, with numbers increasing by 21.2%. The number of students with public providers increased by only 5.3% over the same period.

Victoria VET Students: Total



Ref: 2021 NCVER Databuilder

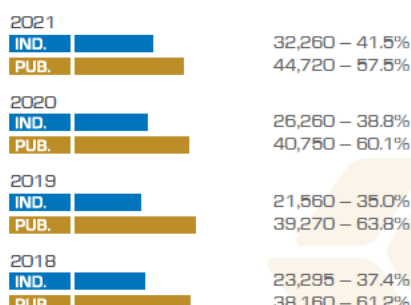
Victoria VET Students: By Provider Type



Ref: 2021 NCVER Databuilder

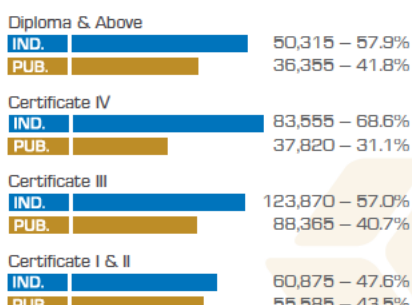
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across Victoria; a 30.8% increase year-on-year. This reflects a national trend and is directly attributed to two Australian Government initiatives; the 'Boosting Apprenticeship Commencements' wage subsidy and the related 'Completing Apprenticeship Commencements' wage subsidy.

Victoria Apprentices & Trainees: By Provider Type



Ref: 2021 NCVER Databuilder

Victoria Qualification Enrolments: By Provider Type



Ref: 2021 NCVER Databuilder

As shown below, the Victorian Government has increased its investment in skills training delivery by \$49.5 million over four years (exclusive of short-term pandemic stimulus measures), and the level of funding to independent providers for training delivery has decreased by \$129.6 million over the same period.

Victoria Total Funding For Skills Delivery



NCVER Government Funding of VET 2020

Victoria Funding For Skills Delivery To Ind.



NCVER Government Funding of VET 2020

Inner & Outer Regional Students

In Victoria, 80.3% of students in inner & outer regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder

Indigenous Students

In Victoria, 74.2% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Students With A Disability

In Victoria, 66.8% of students with a disability choose to study with independent RTOs.

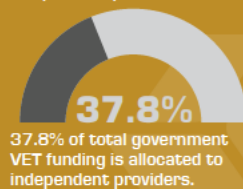
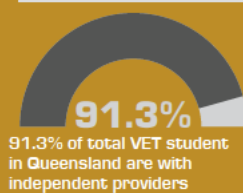
Ref: 2021 NCVER Databuilder

Disadvantaged Background Students

In Vic 81.9% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Students & Funding QLD State Snapshot



2021 NCVET Databuilder; NCVET Government Funding of VET 2020

Queensland

SKILLS TRAINING

Queensland is Australia's third-largest economy, representing 19.5% of the nation's economic activity. The economy is export-orientated, primarily focused on the mining, agriculture, and tourism sectors, with the tourism sector accounting for 6.3% of the state's economic activity. Key exports are coal, metals, meat, and sugar, with Queensland producing 94% of the nation's raw sugar. Statewide, workforce productivity improvements are driven by the state's independent skills training sector.

Skills Funding Programs

The 'Skills Assure' program is the state government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 441 independent RTOs that receive State Government funding to support students, of which 106 (24%) are headquartered outside the State.

The 'Skills Assure' training program is administered by the Department of Employment, Small Business, and Training. There is limited opportunity for RTOs to gain approval under the 'Skills Assure' program and RTOs can only enter the market to service an area of skills need or thin markets where no existing providers are able to service the identified need.

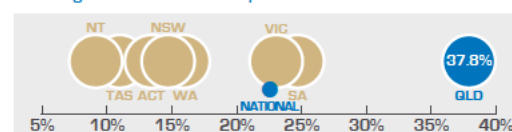
The two largest public providers, TAFE Queensland and Central Queensland University, support just 13.2% of students. Despite this, public providers receive 61.2% of government funding.

Number Of Training Providers

▪ Independent – Private and associations	879 RTOs
▪ Independent – Community	25 RTOs
▪ Independent – Enterprise	10 RTOs
▪ Public – Enterprise	13 RTOs
▪ Public – TAFE and universities	4 RTOs
▪ School – Non-government	86 RTOs
▪ School – Government	190 RTOs

Government data shows that Queensland's total spending on vocational education and training is \$887.0 million of which 37.8% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is the strongest of all jurisdictions and significantly above the national figure of 22.0%.

Proportion Of Training Provision Funding Attributed To Independent Providers



Queensland

Skills Training Sector Size

Total Population:
5,221,170 National Rank: #3

Registered Training Organisations:
1,207 (All types) National Rank: #1

Total Students:
962,565 National Rank: #2

% Working Age Pop As Skills Students:
25.4% National Rank: #3

Students With Independent Providers:
878,370 National Rank: #2

% Students With Independent Providers:
91.3% National Rank: #3

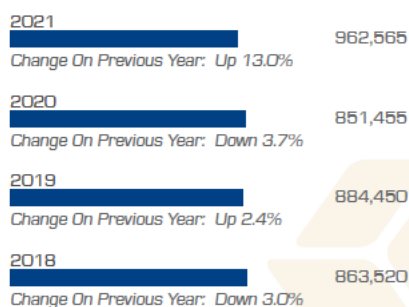
Skills Funding Total:
\$887.0M National Rank: #3

Skills Funding To Independent Sector:
37.8% (\$335.6M) National Rank: #1

2021 NCVET Databuilder; 2021 ABS Population Statistics;
NCVER Government Funding of VET 2020

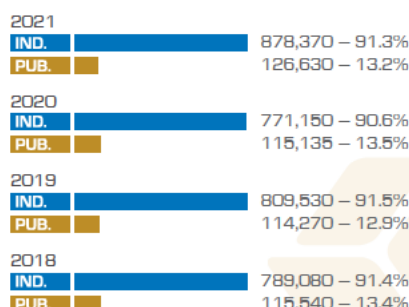
In Queensland, both public and independent providers experienced growth in student numbers, with student numbers at independent providers increasing by 13.9%, and public providers by 10.0% over 2020-21. The increase in students with public providers is contrary to the national trend and can be attributed to the Queensland Government's delivery of the JobTrainer program, which restricted the delivery of selected qualifications to public providers.

Queensland VET Students: Total



Ref: 2021 NCVET Databuilder

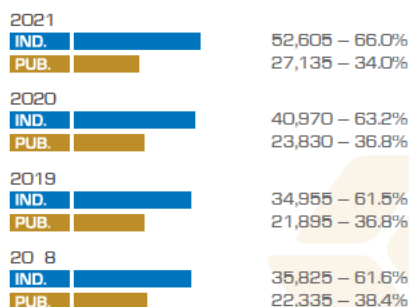
Queensland VET Students: By Provider Type



Ref: 2021 NCVET Databuilder

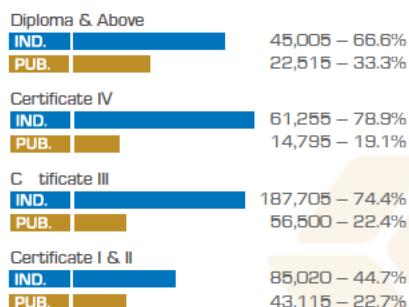
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across Queensland, something that reflects a national trend and is directly attributed to two Australian Government initiatives, these being the 'Boosting Apprenticeship Commencements' wage subsidy and the related 'Completing Apprenticeship Commencements' wage subsidy.

Queensland Apprentices & Trainees: By Provider Type



Ref: 2021 NCVET Databuilder

Queensland Qualification Enrolments: By Provider Type



Ref: 2021 NCVET Databuilder

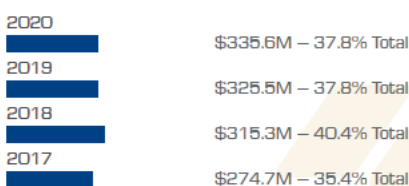
As shown below, the Queensland Government has increased its investment in skills training delivery by \$111.6 million over four years, and the level of funding to independent providers for deliver has increased by \$60.9 million over the same period.

Queensland Total Funding For Skills Delivery



NCVER Government Funding of VET 2020

Queensland Funding For Skills Delivery To Ind.



NCVER Government Funding of VET 2020



Remote, Rural & Regional Students

In Queensland, 91.3% of students in rural, remote and regional areas study with independent RTOs.

Ref: 2021 NCVET Databuilder



Indigenous Students

In Queensland, 85.2% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder



Students With A Disability

In Queensland, 83.8% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder



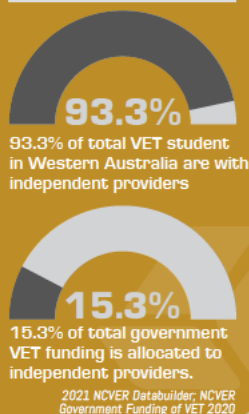
Disadvantaged Background Students

In QLD 89.6% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder

Students & Funding

WA State Snapshot



Western Australia

Skills Training Sector Size

Total Population:

2,681,633

National Rank: #4

Registered Training Organisations:

401 (All types)

National Rank: #4

Total Students:

403,545

National Rank: #4

% Working Age Pop As Skills Students:

14.4%

National Rank: #8

Students With Independent Providers:

376,405

National Rank: #4

% Students With Independent Providers:

93.3%

National Rank: #2

Skills Delivery Funding Total:

\$464.0M

National Rank: #4

Skills Delivery Funding To Independent:

15.3% (\$71.2M)

National Rank: #4

2021 NCVER Databuilder; 2021 ABS Population Statistics; NCVER Government Funding of VET 2020

Western Australia

SKILLS TRAINING

Western Australia is an export-orientated economy, particularly focused on mining, with the state contributing 58% of the nation's mineral and energy exports. Agriculture industries are also a major economic contributor, with the state accounting for 50% of the nation's live cattle exports. Other significant agricultural exports include barley, peas, wool, lamb, and beef.

Skills Funding Programs

The 'Skills Ready' program is the state government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 94 independent RTOs that receive state government funding to support students, of which 26 (27.7%) are headquartered outside the state.

The 'Skills Ready' training program is administered by the Department of Training and Workforce Development. RTOs looking to deliver training through the 'Skills Ready' training program must first become a 'Preferred Provider' through a competitive tender process. The process for this occurs every three years, with this process recently occurring in July 2022, for the 2023 – 2025 period.

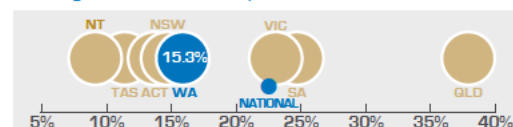
Western Australia has the second largest number of TAFE colleges in the country, with 6 TAFE colleges across the state. Each TAFE operates in a distinct region, both in metropolitan and regional areas.

Number Of Training Providers

Independent – Private and associations	345 RTOs
Independent – Community	11 RTOs
Independent – Enterprise	9 RTOs
Public – Enterprise	10 RTOs
Public – TAFE and universities	7 RTOs
School – Non-government	2 RTOs
School – Government	17 RTOs

Western Australia's total spending on vocational education and training is \$71.2 million of which 15.3% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is below the national figure of 22.0%.

Proportion Of Training Provision Funding Attributed To Independent Providers

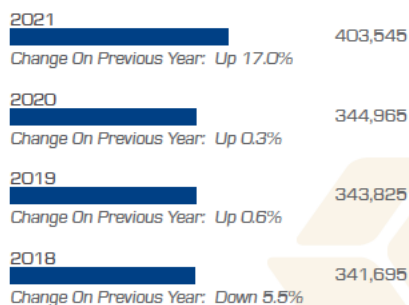


NCVER Government Funding of VET 2020

On the key measure of funding, Western Australia has a clear preference for funding its public TAFE sector, something that limits a student's choice of training provider.

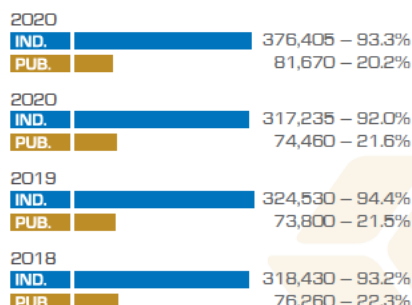
Like most jurisdictions, Western Australia experienced a large increase of students in skills training between 2020 and 2021, largely attributable to the JobTrainer program. Student numbers with independent providers increased by 18.7% in 2021 on 2020 levels, with independent providers supporting an additional 59,170 students. Over the same period, public providers saw an increase of an additional 7,210 students in 2021 compared to 2020 levels, an increase of 9.7% over the period.

Western Australia VET Students: Total



Ref: 2021 NCVER Databuilder

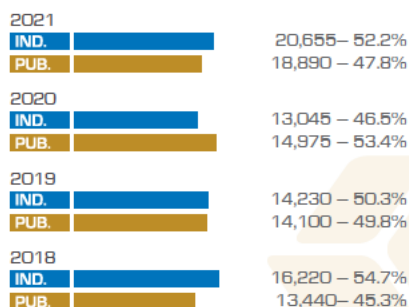
Western Australia VET Students: By Provider Type



Ref: 2021 NCVER Databuilder

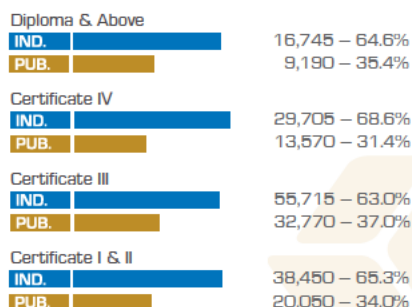
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across Western Australia, something that reflects a national trend and is directly attributed to two Australian Government initiatives, these being the 'Boosting Apprenticeship Commencements' wage subsidy and the related 'Completing Apprenticeship Commencements' wage subsidy.

Western Australia Apprentices & Trainees: By Provider Type



Ref: 2021 NCVER Databuilder

Western Australia Qualification Enrolments: By Provider Type



Ref: 2021 NCVER Databuilder

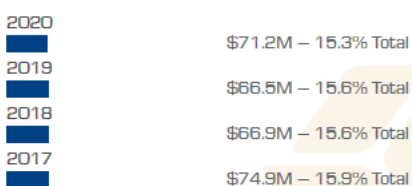
As shown below, the Western Australian Government has decreased its investment in skills training delivery by \$5.7 million over four years, and the level of funding to independent providers for delivery has decreased by \$3.7 million over the same period.

Western Australia Total Funding For Skills Delivery



NCVER Government Funding of VET 2020

Western Australia Funding: Skills Delivery To Independents



NCVER Government Funding of VET 2020



Remote, Rural & Regional Students

In WA, 79.1% of students in remote, rural and regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder



Indigenous Students

In WA, 80.7% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

In WA, 73.2% of students with a disability choose to study with independent RTOs.

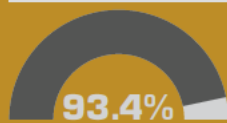
Ref: 2021 NCVER Databuilder



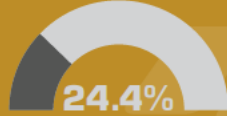
Disadvantaged Background Students

In WA 88.8% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Students & Funding
SA State Snapshot

93.4% of total VET student in South Australia are with independent providers



24.4% of total government VET funding is allocated to independent providers.

2021 NCVER Databuilder; NCVER Government Funding of VET 2020

South Australia

Skills Training Sector Size

Total Population:

1,773,243 National Rank: #5

Registered Training Organisations:

192 (All Types) National Rank: #5

Total Students:

268,580 National Rank: #5

% Working Age Pop As Skills Students:

34.4% National Rank: #1

Students With Independent Providers:

250,785 National Rank: #5

% Students With Independent Providers:

93.4% National Rank: #1

Skills Delivery Funding Total:

\$307.6M National Rank: #5

Skills Delivery Funding To Ind. Providers:

24.4% (\$75.2M) National Rank: #2

2021 NCVER Databuilder; 2021 ABS Population Statistics;
NCVER Government Funding of VET 2020

South Australia

SKILLS TRAINING

South Australia is a service-orientated economy, with the health and retail sectors employing almost a quarter of South Australians. Manufacturing is also a significant industry accounting for 11.7% of the state's economic activity. Export-oriented industries include tourism related industries, manufacturing, pharmaceuticals, mining, particularly uranium and rare metals, and defence industry.

South Australia's Skills Training Funding Programs

The 'Skilling South Australia' program is the state government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 171 independent RTOs that receive state government funding to support students, of which 86 (50.3%) are headquartered outside of the state.

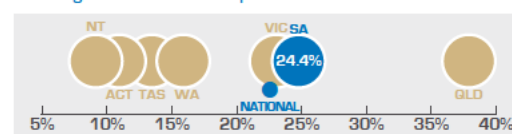
The 'Skills SA' training program is administered by the Department of Education. RTOs seeking to deliver training through the program can apply through the Department of Education, making South Australia one of the most accessible states for RTOs to deliver government funded training. In addition, there are opportunities for RTOs to propose co-designed projects in partnership with business or industry.

South Australia has a 'One TAFE' operating model, with all TAFE campuses operating under the 'TAFE SA' brand.

South Australia' Skills Training Provider Numbers

- RTO Independent – Private and associations 165 RTOs
- RTO Independent – Community 8 RTOs
- RTO Independent – Enterprise 8 RTOs
- RTO Public – Enterprise 6 RTOs
- RTO Public – TAFE and universities 1 RTOs
- RTO School – Non-government 0 RTOs
- RTO School – Government 4 RTOs

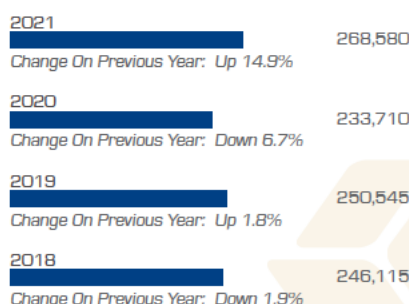
Government data shows that South Australia's total spending on skills training is \$307.6 million of which 24.4% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is marginally above the national figure of 21%.

Proportion Of Skills Delivery
Funding Allocated To Independent Providers

On the key measure of funding for skills training delivery, South Australia has a preference for funding its public TAFE sector, something that limits both a student's choice of course selection and training provider.

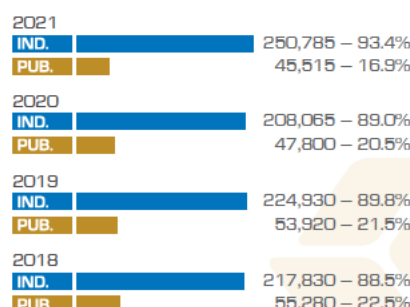
The trend in student numbers in South Australia has been broadly consistent with the national trend, with the total number of students increased between 2020 and 2021. The number of students with independent providers increased by 20.5% in 2021 on 2020 levels, whilst student numbers with public providers declined by 4.7% in the same period. However, this decrease in student numbers has not been reflected in the government's funding decisions, with funding for public providers increasing by 2.6% in 2020 on 2019 levels and funding for independent providers decreasing by 35.3% in the same period.

South Australia VET Students: Total



Ref: NCVER Databuilder

South Australia VET Students: By Provider Type †



Ref: NCVER Databuilder



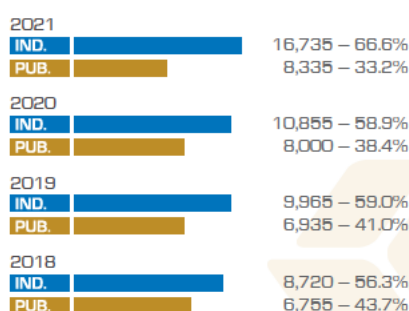
Remote, Rural & Regional Students

In SA 92.2% of students in remote, rural and regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder

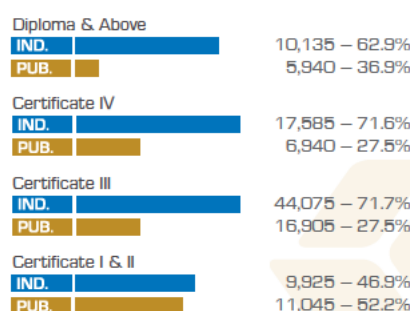
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across South Australia, which reflects a national trend and is attributed to two related Australian Government initiatives. The first is the 'Boosting Apprenticeship Commencements' wage subsidy, and the second is the related 'Completing Apprenticeship Commencements' wage subsidy.

South Australia Apprentices & Trainees: By Provider Type †



Ref: 2021 NCVER Databuilder

South Australia Qualification Enrolments: Provider Type †



Ref: 2021 NCVER Databuilder



Indigenous Students

In SA 80.7% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

In SA, 85.2% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Disadvantaged Background Students

In SA 91.9% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

As shown below, although the South Australian Government has increased its investment in skills training delivery by \$45.2 million over four years, the level of funding to independent providers for delivery has decreased by \$7.4 million over the same period.

South Australia Total Funding For Skills Delivery



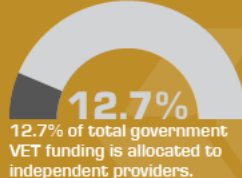
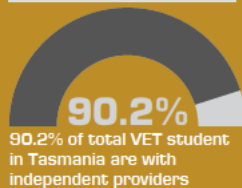
NCVER Government Funding of VET 2020

South Australia Funding For Skills Delivery To Ind.



NCVER Government Funding of VET 2020

Students & Funding TAS State Snapshot



2021 NCVER Databuilder; NCVER Government Funding of VET 2020

Tasmania

Skills Training Sector Size

Total Population:
541,479 National Rank: #6

Registered Training Organisations:
60 (All types) National Rank: #7

Total Students:
88,210 National Rank: #6

% Working Age Pop As Skills Students:
24.5% National Rank: #4

Students With Independent Providers:
79,555 National Rank: #6

% Students With Independent Providers:
90.2% National Rank: #5

Skills Delivery Funding Total:
\$107.4M National Rank: #7

Skills Delivery Funding To Independent:
12.7% (\$13.6M) National Rank: #6

2021 NCVER Databuilder; 2021 ABS Population Statistics; NCVER Government Funding of VET 2020

Tasmania

SKILLS TRAINING

Tasmania is an export-orientated economy, specialising in primary industries, including mining, agriculture, fishing, and forestry, with these sectors accounting for nearly 14% of the state's economic activity. Key exports include metals and food products, including seafood, meat, and dairy products as well as wine. However, the largest employing industries are the health and retail sectors, employing nearly a quarter of Tasmanians.

Skills Funding Programs

The Tasmanian Government has a number of funding programs which supports students to study with independent RTOs.

There are approximately 121 independent RTOs that receive state government funding to support students, of which 85 (70.2%) are headquartered outside the state.

Government-funded training is administered by Skills Tasmania, a division of the Department for State Growth. Before an RTO can deliver government-funded training, it must first become a 'Skills Tasmania Endorsed RTO'. An RTO can apply for this status at any time, and once approved will hold this status for three years. An Endorsed RTO can apply for a range of general and specialised funded training programs.

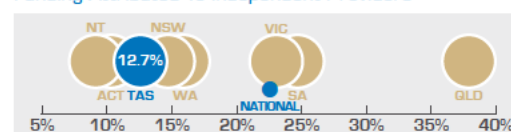
Tasmania operates under a 'One TAFE' model, with all TAFE campuses operating under the 'TasTAFE' brand.

Number Of Training Providers

Independent – Private and associations	45 RTOs
Independent – Community	5 RTOs
Independent – Enterprise	2 RTOs
Public – Enterprise	4 RTOs
Public – TAFE and universities	2 RTOs
School – Non-government	1 RTOs
School – Government	1 RTOs

Government data shows that Tasmania's total spending on skills training is \$1074 million of which 12.7% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is significantly below the national average.

Proportion Of Training Provision Funding Attributed To Independent Providers

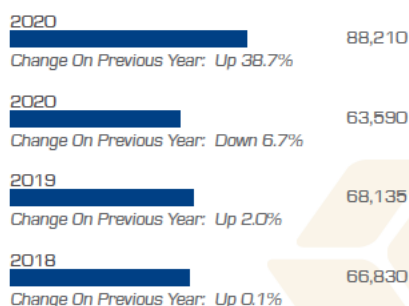


NCVER Government Funding of VET 2020

On the key measure of funding, Tasmania has a clear preference for funding its public TAFE sector, something that limits both a student's choice of course selection and training provider.

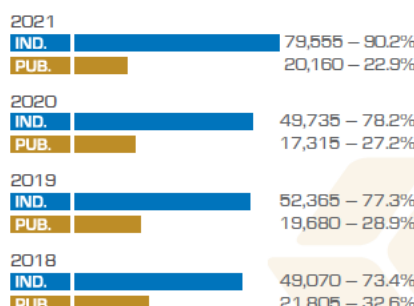
Consistent with the national trend, Tasmania saw an increase in the total number of students between 2020 and 2021. The number of students with independent providers increased by 60.0% in 2021 on 2020 levels, the largest observed rise across Australia, whilst student numbers with public providers increased by 164% in the same period. However, this increase in student numbers has not been reflected in the state government's funding decisions, with funding for independent providers decreasing by 2.9% in 2020 on 2019 levels, and funding to public provider increasing by 2.9% in the same period.

Tasmania VET Students: Total



Ref: 2021 NCVER Databuilder

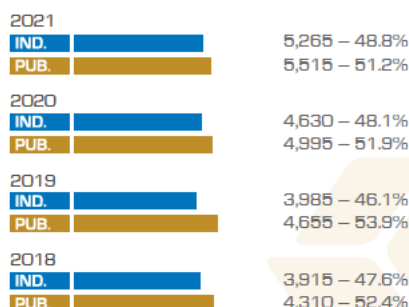
Tasmania VET Students: By Provider Type



Ref: 2021 NCVER Databuilder

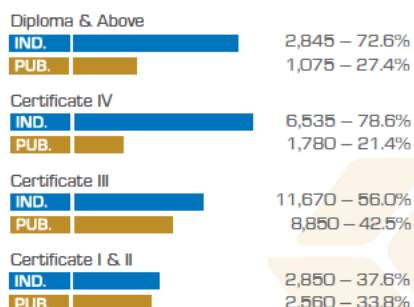
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across Tasmania, something which reflects a national trend and is directly attributed to two related Australian Government initiatives. The first of these is the 'Boosting Apprenticeship Commencements' wage subsidy, and the second is the related 'Completing Apprenticeship Commencements' wage subsidy.

Tasmania Apprentices & Trainees: By Provider Type



Ref: 2021 NCVER Databuilder

Tasmania Qualification Enrolments: By Provider Type



Ref: 2021 NCVER Databuilder

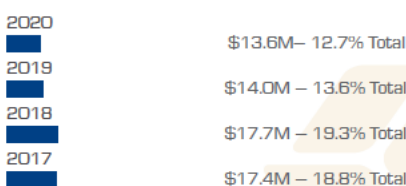
As shown below, although the Tasmanian Government has increased its investment in skills training delivery by \$14.8 million over four years, the level of funding to independent providers for delivery has decreased by \$3.8 million over the same period.

Tasmania Total Skills Funding



NCVER Government Funding of VET 2020

Tasmania Funding To Independent Providers



NCVER Government Funding of VET 2020



Remote, Rural & Regional Students

In Tasmania, 89.5% of students in remote, rural and regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder



Indigenous Students

In Tasmania 81.5% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

In Tasmania, 70.1% of students with a disability choose to study with independent RTOs.

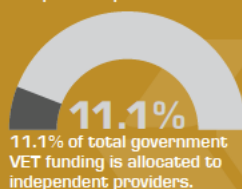
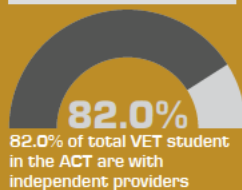
Ref: 2021 NCVER Databuilder



Disadvantaged Background Students

88.3% of students from LSES backgrounds in the state choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

Students & Funding
ACT State Snapshot2021 NCVET Databuilder; NCVET
Government Funding of VET 2020

Australian Capital Territory

SKILLS TRAINING

The Australian Capital Territory is a service-orientated economy primarily centred on the Australian Public Service, with the public sector employing almost a third of all Canberrans. Tertiary education is a notable export market for the territory, with a number of higher education and vocational education providers located in the Canberra region.

Skills Funding Programs

The 'Skilled Capital' program is the territory government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 56 independent RTOs that receive state government funding to support students, of which 37 (66.1%) are headquartered outside the Territory.

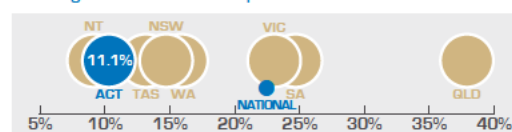
The 'Skilled Capital' training program administered by Skills Canberra, a division of the Chief Minister, Treasury and Economic Development Directorate. Applications to deliver funded training through the 'Skilled Capital' program are open on a rolling basis, and Skills Canberra accepts applications at any time. Currently, Skills Canberra is utilising the 'Skilled Capital' program to roll out the JobTrainer initiative.

The Australian Capital Territory has a single 'TAFE' college called 'The Canberra Institute of Technology', with campuses located across the territory.

Number Of Training Providers

■ Independent – Private and associations	67 RTOs
■ Independent – Community	7 RTOs
■ Independent – Enterprise	0 RTOs
■ Public – Enterprise	5 RTOs
■ Public – TAFE and universities	1 RTO
■ School – Non-government	6 RTOs
■ School – Government	5 RTOs

Government data shows that the Australian Capital Territory's total spending on vocational education and training is \$115.0 million of which 11.1% was allocated to independent RTOs. As is highlighted by the chart below, this allocation is significantly below the national average.

Proportion Of Training Provision
Funding Attributed To Independent Providers

On the key measure of funding, the Australian Capital Territory has a clear preference for funding its public TAFE sector, something that limits both a student's choice of course selection and training provider.

Australian Capital Territory
Skills Training Sector Size

Total Population:
432,266 National Rank: #7

Registered Training Organisations:
91 (All types) National Rank: #6

Total Students:
60,395 National Rank: #7

% Working Age Pop As Skills Students:
19.8% National Rank: #7

Students With Independent Providers:
49,545 National Rank: #7

% Students With Independent Providers:
82.0% National Rank: #7

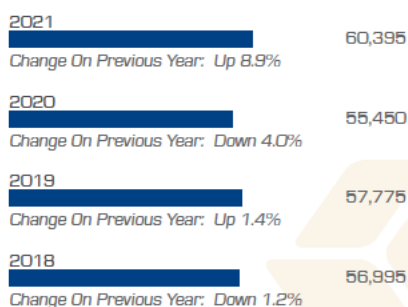
Skills Delivery Funding Total:
\$115.0M National Rank: #6

Skills Delivery Funding To Independent:
11.1% (\$12.8M) National Rank: #7

2021 NCVET Databuilder; NCVET
Government Funding of VET 2020

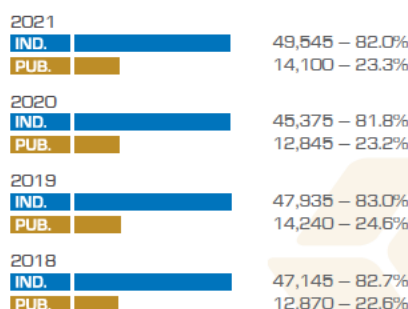
In the Australian Capital Territory the total number of students increased in 2021. Independent providers saw an increase of 9.2% in 2021 on 2020 levels, and with public providers by 9.8% in the same period, which is inconsistent with the national trend. In response funding for independent providers increased by 11.3% in 2020 from 2019 levels, while funding for public providers increased by only 2.2% in the same period, reflecting the fact that independent providers have more than three times the number of students.

Australian Capital Territory VET Students: Total



Ref: 2021 NCVER Databuilder

Australian Capital Territory VET Students: By Provider Type



Ref: 2021 NCVER Databuilder



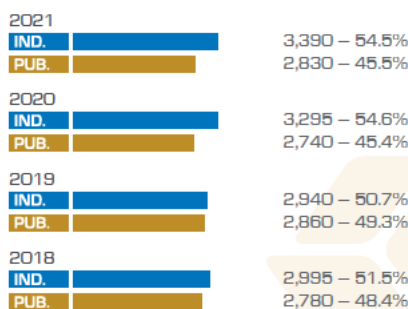
Inner Regional Students

In the ACT, 78.9% of students in inner regional areas study with independent RTOs.

Ref: 2021 NCVER Databuilder

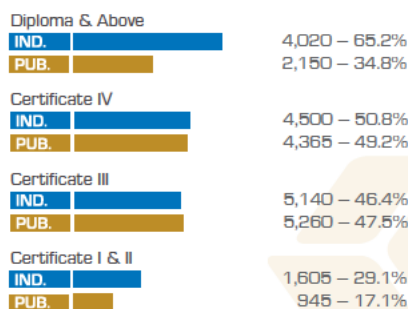
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across the ACT, which reflects a national trend and is attributed to two related Australian Government initiatives. The first of these is the 'Boosting Apprenticeship Commencements' wage subsidy, and the second is the related 'Completing Apprenticeship Commencements' wage subsidy.

Australian Capital Territory Apprentices & Trainees: By Provider Type



Ref: 2021 NCVER Databuilder

Australian Capital Territory Qualification Enrolments: By Provider Type



Ref: 2021 NCVER Databuilder



Indigenous Students

In the ACT 65.5% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Students With A Disability

In the ACT, 57.5% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder



Disadvantaged Background Students

In the ACT 80.3% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVER Databuilder

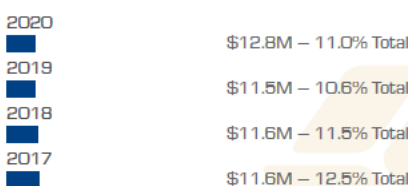
As shown below, the Australian Capital Territory Government has increased its investment in skills training delivery by \$22.2 million over four years, and the level of funding to independent providers for delivery has increased by \$1.2 million over the same period.

Australian Capital Territory Total Skills Funding



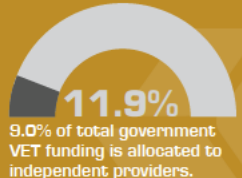
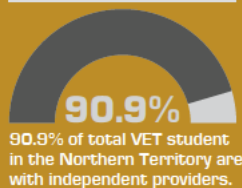
NCVER Government Funding of VET 2020

Australian Capital Territory Funding To Independent Providers



NCVER Government Funding of VET 2020

Students & Funding NT State Snapshot



2021 NCVER Databuilder; NCVER Government Funding of VET 2020

Northern Territory

SKILLS TRAINING

The Northern Territory is the nation's smallest economy with Gross State Product of \$2649 billion, accounting for 1.3% of the nation's economic activity. It is an export-orientated economy primarily centred on the mining industry accounting for 14.9% of the territory's economic activity. Key exports include minerals, petroleum, and natural gas. Tourism-related industries are also key economic contributors, particularly in regional areas.

Skills Funding Programs

The 'NT User Choice' program is the territory government's primary vehicle through which students are supported to study with independent RTOs.

There are approximately 74 independent RTOs that receive government funding to support students, of which 50 (67.6%) are headquartered outside the Territory.

The 'NT User Choice' program is the primary public funding support for NT RTOs. The 2023 funding round has opened. In addition, RTOs can apply for funding to attract and retain skilled workers in partnership with industry partners through the Flexible Workforce Solutions Fund.

The NT has two public providers, Charles Darwin University and the Batchelor Institute of Indigenous Tertiary Education

Number Of Training Providers

■ Independent – Private and associations	35 RTOs
■ Independent – Community	3 RTOs
■ Independent – Enterprise	2 RTOs
■ Public – Enterprise	4 RTOs
■ Public – TAFE and universities	2 RTOs
■ School – Non-government	1 RTO
■ School – Government	1 RTO

Government data shows that the Northern Territory's total spending on skills training is \$71.5 million of which 9.0% was allocated to independent RTOs. This is the lowest proportion of total spending on skills delivery allocated to independent RTOs of all states and territories. However, it is important to note that the NT has the highest proportion across all jurisdictions of investment in skills delivery that is not attributable by RTO type (14.1% in 2020). While this is a challenge for accurate reporting, funding flows within this proportion still tends to be related to broader skills investment flows within the jurisdiction. For more information, see the References section.

Northern Territory Skills Training Sector Size

Total Population:
246,388 National Rank: #8

Registered Training Organisations:
50 (All types) National Rank: #8

Total Students:
46,835 National Rank: #8

% Working Age Pop As Skills Students:
24.1% National Rank: #4

Students With Independent Providers:
42,575 National Rank: #8

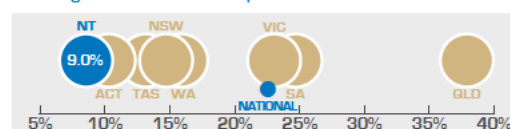
% Students With Independent Providers:
90.9% National Rank: #4

Skills Delivery Funding Total:
\$71.5M National Rank: #8

Skills Delivery Funding To Independent:
9.0% (\$6.4M) National Rank: #8

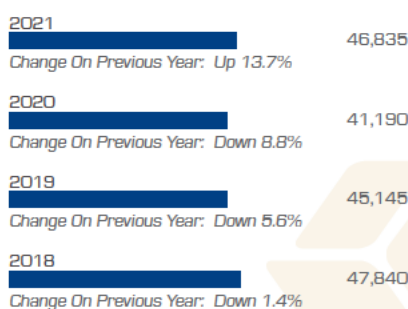
2021 NCVER Databuilder; 2021 ABS Population Statistics; NCVER Government Funding of VET 2020

Proportion Of Training Provision Funding Attributed To Independent Providers



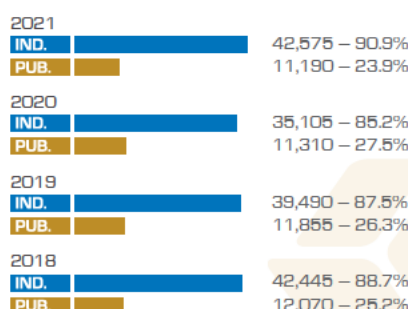
Consistent with the national trend, student numbers in the Northern Territory studying with independent providers increased by 21.3% in 2021 on 2020 levels, its highest point in four years. Meanwhile, student numbers with public providers declined marginally in the same period. However, this is not reflected in the Territory's funding decisions, with public providers maintaining their level of funding between 2019 and 2020, while funding for independent providers decreased by 24.7% in 2020 compared to 2019 levels.

Northern Territory VET Students: Total



Ref: 2021 NCVET Databuilder

Northern Territory VET Students: By Provider Type



Ref: 2021 NCVET Databuilder



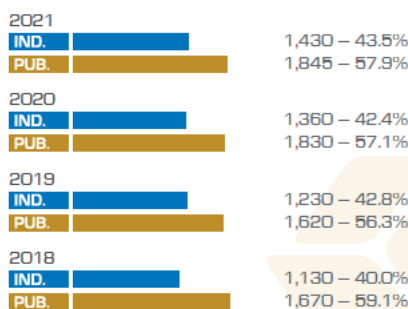
Remote & Very Remote Students

In the NT, 84.0% of students in remote and very remote areas study with independent RTOs.

Ref: 2021 NCVET Databuilder

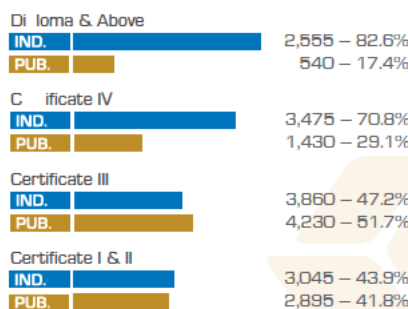
Between 2020 and 2021, there has been a significant increase in the number of apprentices and trainees across the Northern Territory, directly attributed to two related Australian Government initiatives. The first of these is the 'Boosting Apprenticeship Commencements' wage subsidy, and the second is the related 'Completing Apprenticeship Commencements' wage subsidy.

Northern Territory Apprentices & Trainees: By Provider Type



Ref: 2021 NCVET Databuilder

Northern Territory Qualification Enrolments: By Provider Type



Ref: 2021 NCVET Databuilder



Indigenous Students

In the NT, 67.5% of indigenous students choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder



Students With A Disability

In NT, 73.1% of students with a disability choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder



Disadvantaged Background Students

In the NT 81.0% of students from LSES backgrounds choose to study with independent RTOs.

Ref: 2021 NCVET Databuilder

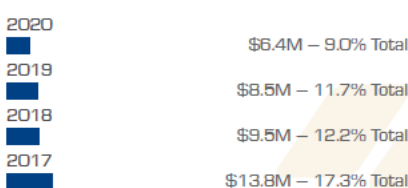
As shown below, the Northern Territory Government has decreased its investment in skills training delivery by \$8.1 million over four years, and the level of funding to independent providers for delivery has decreased by \$74 million over the same period.

Northern Territory Total Skills Funding



NCVER Government Funding of VET 2020

Northern Territory Funding To Independent Providers



NCVER Government Funding of VET 2020

Nation Wide Skills Training ■ League Tables

Australia has a diverse system of skills training whereby students can access qualifications in more than 50 training packages in nationally recognised training, through skillsets and to unaccredited training. It is also a notable characteristic of the Australian training system that each jurisdiction has distinctive features, particularly in terms of how investment in skills training is allocated and distributed. A similarity across all jurisdictions that surprises many, however, is that the clear majority of students choose an independent Registered Training Organisation (RTO) for their skills training needs. While the national proportion was 87.1% in 2021, this ranged from 93.4% in South Australia to 80.8% in NSW.

National Snapshot

Proportion Total Students at Independent RTOs By Jurisdiction (2021)

Jurisdiction	Total Students	# Independent	% Independent
① South Australia	268,580	250,785	93.4%
② Western Australia	403,545	376,405	93.3%
③ Queensland	962,565	878,370	91.3%
④ Northern Territory	46,835	42,575	90.9%
⑤ Tasmania	88,210	79,555	90.2%
● Nationally	4,299,555	3,743,295	87.1%
⑥ Victoria	904,595	749,070	82.8%
⑦ Australian Capital Territory	60,395	49,545	82.0%
⑧ New South Wales	1,139,955	921,585	80.8%

Ref: 2021 NCVET Databuilder

The strength of the skills training sector is demonstrated by the proportion of the working age population (15-64) undertaking skills training. Nationally, 25.2% of the working age population were engaged in skills training in 2021. This ranged from more than two-thirds in both SA (34.4%) to 19.8% in the ACT, and 14.4% in WA. Data such as these will focus attention on prior educational attainment, population density and government investment in skills delivery.

National Snapshot

Total students (15 – 64yrs) As A % of Working Age Population (WAPN) By Jurisdiction

Jurisdiction (Data for 2021)	Working Age Population	Total Students of Working Age	WAPN % of Total Pop
① South Australia	1,115,655	383,990	34.4%
② Queensland	3,356,400	851,965	25.4%
● Nationally	16,637,656	4,185,930	25.2%
③ Tasmania	333,889	81,705	24.5%
④ Northern Territory	171,840	43,760	24.1%
⑤ New South Wales	5,269,036	1,106,590	21.0%
⑥ Victoria	4,360,687	901,640	20.7%
⑦ Australian Capital Territory	289,819	57,325	19.8%
⑧ Western Australia	1,737,313	250,155	14.4%

Ref: 2021 NCVET Data Builder, ABS Population Statistics

National Snapshot

Government Funding (Skills Delivery & Capital Funding) Allocated To Independent RTOs

Jurisdiction	2021 Total (\$m)	\$ Independent	% Independent
① Queensland	\$887.00	\$335.60	37.8%
② South Australia	\$307.60	\$75.20	24.4%
③ Victoria	\$1,344.10	\$307.50	22.9%
● Nationally	\$5,369.10	\$1,181.50	22.0%
④ Western Australia	\$464.00	\$71.20	15.3%
⑤ New South Wales	\$1,764.80	\$256.60	14.5%
⑥ Tasmania	\$107.40	\$13.60	12.7%
⑦ Australian Capital Territory	\$115.00	\$12.80	11.1%
⑧ Northern Territory	\$71.50	\$6.40	9.0%

NCVER Government funding of VET 2020

Real recurrent expenditure per annual hour of training can be an important indicator of investment performance when it comes to delivering outcomes through the skills system. The data show that while expenditure per annual hour has increased each year over 2017-2020 for most jurisdictions, it has not been uniform. In 2020, Tasmania (\$34.95 / hr) and the NT (\$32.99 / hr) were the only two jurisdictions above \$30/hr having increased that investment by 48% and around 34% respectively.

National Snapshot

Total Government Real Recurrent Expenditure Per Annual Hour 2017 – 2020 (\$2020)

Jurisdiction	2017 (\$/hr)	2018 (\$/hr)	2019 (\$/hr)	2020 (\$/hr)
① Tasmania	23.61	26.49	28.51	34.95
② Northern Territory	24.63	28.63	29.61	32.99
③ Australian Capital Territory	23.64	20.93	22.26	28.42
④ South Australia	18.36	24.10	22.90	25.49
⑤ Western Australia	19.06	18.70	18.72	23.15
⑥ New South Wales	20.15	20.06	20.87	22.33
● Nationally	18.34	18.87	18.03	21.21
⑦ Victoria	15.53	16.02	14.51	20.01
⑧ Queensland	18.60	18.71	15.79	16.78

Productivity Commission 2022: Report on Government Services

Data on the number of RTOs shows, when analysed alongside the number of students in the jurisdictions those government funded RTOs are servicing, there is a 'clustering' of around 3,250 students per RTO (Victoria) to 2180 students per RTO (Queensland). This is followed by two smaller groupings. The first is South Australia and the Australian Capital Territory (approx. 1,570 and 1,080 respectively). The other are the outliers to the dataset: Western Australia with one of the smaller funded RTO groupings (94) and just under 4,300 students per RTO with a funding contract. At the other end are Tasmania and the Northern Territory with around 730 and 630 students per RTO respectively.

National Snapshot

Independent RTOs With Govt Funding Contracts / Total Students

Jurisdiction	Indep. RTOs w. Govt Contracts	Total Number of Students	Students / Funded RTO (av)
① Western Australia	94	403,545	4,293
② Victoria	278	904,595	3,254
③ New South Wales	356	1,139,955	3,202
④ Queensland	441	962,565	2,183
⑤ South Australia	171	268,580	1,571
⑥ Australian Capital Territory	56	60,395	1,079
⑦ Tasmania	121	88,210	729
⑧ Northern Territory	74	46,835	633

Reference Year: 2021 Source: Dept Education

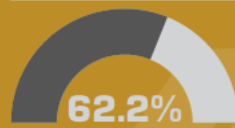
National Snapshot

Proportion of Apprentices & Trainees at Independent Providers by Jurisdiction (Dec '21)

Jurisdiction	2021 Total	# Independent	% Independent
① South Australia	25,110	16,735	66.6%
② Queensland	79,760	52,605	66.0%
③ Australian Capital Territory	6,220	3,390	54.5%
④ Western Australia	40,135	21,160	52.7%
● Nationally	349,230	182,220	52.2%
⑤ Tasmania	10,780	5,265	48.8%
⑥ New South Wales	105,215	48,760	46.3%
⑦ Northern Territory	3,285	1,430	43.5%
⑧ Victoria	77,785	32,260	41.5%

Ref: 2021 NCVER DataBuilder

Training Packages National Snapshot



of all training package
enrolments in Australia are
with independent providers.

Ref: 2021 NCVET Databuilder

90%+

Independent RTOs
in Australia support more than
90% of enrolments in training
packages such as:

- Resources and infrastructure
- Transport and logistics
- Sustainability

Ref: 2021 NCVET Databuilder

100%

Independent RTOs
in Australia support 100% of
enrolments in key
training packages such as:

- Defence
- Correctional services
- Gas industry

Ref: 2021 NCVET Databuilder

Skills Training Packages

NATIONAL SKILLS TRAINING

The following shows the number of enrolments at independent RTOs within each training package across Australia, including as a percentage of all enrolments (with all provider types).

Aeroskills (MEA)	1,005	68.8%
Agriculture, Horticulture and Conservation and Land Management (AGF, AGR, AHC, RTD, RTE, RTF, RUA, RUH)	25,525	42.2%
Animal Care and Management (ACM, RUV)	5,305	24.2%
Australian Meat Processing (AMP, MTM)	5,940	72.6%
Automotive Industry Manufacturing (AUM)	—	0.0%
Automotive Industry Retail, Service and Repair (AUR)	37,225	46.3%
Aviation (AVI, TDA, ZQF)	3,900	76.8%
Business Services (BSA, BSB)	277,245	77.3%
Chemical, Hydrocarbons and Refining (PMA)	495	36.1%
Community Services (CHC)	305,650	71.8%
Construction, Plumbing & Services Integrated Framework (BCF, BCG, BCP, CPC)	89,760	50.1%
Correctional Services (CSC)	6,885	99.4%
Creative Arts and Culture (CUA, CUE, CUF, CUS, CUV)	27,650	44.7%
Defence (DEF)	245	92.5%
Electrotechnology (UEE, UTE, UTL)	17,890	24.9%
Electricity Supply Industry - Generation Sector (UEP, UTP)	235	100.0%
Financial Services (FNA, FNB, FNS)	39,980	62.1%
Floristry (SFL, WRF)	710	27.1%
Food, Beverage and Pharmaceutical (FBP, FDF, SUG)	4,785	49.2%
Forest and Wood Products (FPI, FWP)	1,585	90.3%
Foundation Skills (FSK)	19,190	32.1%
Funeral Services (SIF, WFS)	50	100.0%
Furnishing (LMF, MSF)	8,445	36.6%
Gas Industry (UEG, UTG)	650	100.0%
Hairdressing and Beauty Services (SHB, SIB, SIH, WRB, WRH)	18,135	41.5%
Health (HLT)	54,660	48.5%
Information and Communications Technology (ICA, ICT)	21,830	39.9%
Laboratory Operations (MSL, PML)	4,925	53.9%
Library, Information and Cultural Services (CUL)	—	0.0%
Local Government (LGA)	385	69.4%
Manufactured Mineral Products (PMC)	—	0.0%
Manufacturing (MCM, MSA, MSM)	4,990	64.9%
Maritime (MAR, TDM)	4,040	59.5%
Metal and Engineering (MEM)	15,175	27.3%
National Water (NWP, UTW)	505	32.8%
Non-training packages	37,265	16.9%
Plastics, Rubber and Cablemaking (PMB)	655	83.4%
Police (POL)	350	84.3%
Printing and Graphic Arts (ICP)	430	45.5%
Property Services (CPP, PRD, PRM, PRS)	56,275	85.6%
Public Safety (PUA)	9,730	97.5%
Public Services (PSP)	8,480	72.6%
Pulp & Paper Manufacturing Industry (FPP, PPM) -	—	0.0%
Racing Industry (RGR)	1,145	82.7%
Resources and Infrastructure (BCC, DRT, MNC, MNM, MNQ, RII)	64,665	91.1%
Retail Services (S R, WRP, WRR, WRW)	31,725	83.3%
Seafood Industry (SFI)	480	55.5%
Sport, Fitness and Recreation (SIS, SRC, SRF, SRD, SRS)	98,070	85.9%
Sustainability (MSS)	4,405	96.9%
Transport and Logistics (TDT, TLI)	65,970	96.0%
Textiles, Clothing and Footwear (LMT, MST)	1,090	21.1%
Tourism, Travel and Hospitality (SIT, THH, THT)	138,120	67.1%
Training and Education (BSZ, TAA, TAE)	30,720	74.5%
Transmission, Distribution and Rail (UET, UTT)	2,260	34.4%



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Independent Higher Education

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NATIONAL SNAPSHOT HIGHER EDUCATION

Higher Education
Student Numbers

10.0%
of higher education students
study with
independent providers.

Ref: 2021 NCVET Databuilder

Higher Education

NATIONALSNAPSHOT

The Australian higher education sector comprises 190 registered providers that support more than 1.6 million students. Independent providers make up 75.8% of the sector; or 144 providers. They deliver consistently high-quality degree programs in a broad range of fields that are sought after by students and employers alike. In addition, a significant number of these providers are engaging in new research in unique discipline areas that put them at the forefront of knowledge development and acquisition in those areas. Over 2017-2020 the number of students studying with independent providers grew by 25,055 or 18.2%; almost three times the growth at public universities over the same period.

Australia's Independent Sector

Universities:

Typically a not-for-profit entity that meets the requirements to deliver self-accredited undergraduate and postgraduate courses and which may be specialised in one or two fields of education. A university must also undertake research that leads to new knowledge and original creative endeavour as well as research training.

University Colleges:

May be either a new or existing provider but must demonstrate capacity and resources to meet the criteria. Can be an existing provider that can demonstrate mature development and a strong track record or new providers with demonstrated capacity, resources and plans to progress to becoming an Australian University.

Australian Institutes of Higher Education:

An independent organisation (e.g. a company) with a clearly articulated higher education purpose and commitment to academic freedom and freedom of speech, that also meets all regulatory requirements.

National Snapshot

Australia's Higher Education Sector

Higher education providers:

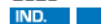



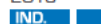

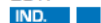

Public - Universities	37
Public - TAFE	9
Independent - Universities	6
Independent - University Colleges	4
Independent - AIHE	134

Higher education students

Public	1,460,501	(90.0%)
Independent	162,366	(10.0%)

Reference Year: 2022 Source: data.gov.au

Higher Education
Students By Provider Type

2020		
IND.		162,366 – 10.0%
PUB.		1,460,501 – 90.0%
2019		
IND.		156,234 – 9.7%
PUB.		1,443,564 – 90.3%
2018		
IND.		146,448 – 9.4%
PUB.		1,416,072 – 90.6%
2017		
IND.		137,311 – 9.1%
PUB.		1,376,072 – 90.9%

SOURCE: Dept of Education

The recent report from the Productivity Commission entitled *5 Year Productivity Enquiry - From Learning To Growth* noted that higher education funding "is often allocated to providers based upon historical grant allocations rather than contestable arrangements,". Clearly it's time for higher education funding reform.

Independent higher education providers deliver quality degree-level programs to more than 162,000 students across Australia in a wide range of discipline areas. The student experience at independent providers is particularly strong in disciplines like humanities, culture and social sciences as well as nursing, agriculture and environmental students and also in tourism and hospitality. In each of these, students have assessed the quality of the entire educational experience as being at a higher level than at public universities.

Higher Education

Students By Field of Study (Independent Providers)

▪ Health	22,272 Students
▪ Education	5,405 Students
▪ Natural and physical sciences	1,448 Students
▪ Information technology	13,940 Students
▪ Engineering and related technologies	2,869 Students
▪ Architecture and building	2,544 Students
▪ Agriculture, environmental and related studies	299 Students
▪ Management and commerce	62,060 Students
▪ Society and culture	33,607 Students
▪ Creative arts	16,444 Students
▪ Food, hospitality and personal services	184 Students
▪ Mixed Field Programs	665 Students
▪ Non-award courses	1,187 Students
▪ Total	162,271 Students

Reference Year: 2020 Source: Dept Education

Higher Education

Student Satisfaction 2021

▪ Skills development	Independent: 81%	University: 79%
▪ Learner engagement	Independent: 57%	University: 48%
▪ Teaching quality	Independent: 81%	University: 79%
▪ Student support	Independent: 79%	University: 72%
▪ Learning resources	Independent: 74%	University: 81%
▪ Quality of entire educational experience	Independent: 74%	University: 73%

Reference Year: 2021 Source: Dept Education

Higher Education

Student Experience - % Positive Rating 2021 - Independent Providers

	Teaching Quality	Educational Experience
▪ Computing and information systems	76%	70%
▪ Agriculture and environmental studies	88%	86%
▪ Nursing	81%	72%
▪ Teacher education	83%	77%
▪ Humanities, culture and social sciences	94%	92%
▪ Tourism, hospitality, sport & recreation	87%	78%
▪ Total	81%	74%

Reference Year: 2021 Source: Dept Education



Rural, Remote & Regional Student Satisfaction

78% of students in rural, remote and regional areas were satisfied with the quality of their entire education experience with independent higher education providers, a better outcome than public providers achieved.

Reference Year: 2021 Source: Dept Education



Indigenous Student Satisfaction

76% of Indigenous students were satisfied with the quality of their entire education experience with independent higher education providers, a better outcome than public providers achieved.

Reference Year: 2021 Source: Dept Education

Independent higher education institutions make an indelible contribution to the Australian higher education landscape. While these institutions may support relatively fewer student numbers, data show they do so to a consistently higher standard. Further, the independent sector continues to add to diversity of the students with around 14,000 studying in IT in 2020, a further 22,000 in health and around 6,000 in education.

Higher Education

2021 Total Employment By Field of Study (Undergraduate) - Independent

▪ Agriculture and Environmental Studies	91.8%
▪ Nursing	89.7%
▪ Humanities, Culture and Social Sciences	87.4%
▪ Psychology	78.1%
▪ Total	77.6%

Reference Year: 2021 Source: Dept Education



International Student Satisfaction

72% of international students at independent higher education providers were satisfied with the quality of their entire education experience with independent providers delivering a better outcome than public providers achieved.

Reference Year: 2021 Source: Dept Education

In highlighting the increased contribution of independent higher education institutions, data from the Commonwealth Department of Education show that award course completion at independent institutions have grown from just 14% of the sector total in 2005 to 12.5% in 2020. Over the period from 2010 to 2020, award course completions at universities increased by 24.9% while at independent institutions completions increased by 131.3%. This reinforces the strides being taken by the independent sector to deliver quality graduates across a range of disciplines that are relevant and valuable for the community and employers.



Student With A Disability Satisfaction

77% of students with a disability at independent higher education providers were satisfied with the quality of their entire education experience. Independent providers delivered a better outcome than public providers achieved.

Reference Year: 2021 Source: Dept Education

Higher Education

Graduate Outcomes - Demographic Group 2020 and 2021 (UG)

	2020 Total Employment	2021 Total Employment
▪ 30 years or under	69.4%	70%
▪ Over 30 years	77.5%	77.1%
▪ External / distance	75.9%	69.1%
▪ Total	70.3%	70.8%

Reference Year: 2021 Source: Dept Education

For domestic students at independent institutions, in 2020 the most prominent fields of study for course completions were in society and culture (154% of the sector total), management and commerce (11%) as well as health (7%) and education (4.9%). Also in 2020, 294% of Doctorates (coursework) were awarded by independent institutions along with 6% of master's by coursework and 4.6% of all Bachelor degrees.

Higher Education

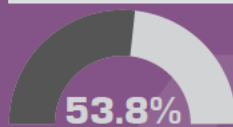
Employer Satisfaction By Graduate Attribute, - Independent Providers

▪ Foundation	91.4%
▪ Adaptive	86.5%
▪ Collaborative	86.3%
▪ Technical	92.0%
▪ Employability	84.0%
▪ Overall Satisfaction	88.4%

Reference Year: 2021 Source: Dept Education



NATIONAL SNAPSHOT **INTERNATIONAL EDUCATION**

International Educational
Sector Snapshot

of international student enrolments in tertiary programs are supported by independent providers.

2021, Department of Education

International Education

NATIONAL SNAPSHOT

Australia's international education sector connects Australia to the world and enables Australia to establish long-term links across the world. Independent providers support around 54% of all international student enrolments in tertiary education programs in Australia and these students make an indelible contribution to Australia's socio-cultural and economic fabric through their experiences and collective diversity.

International Student Enrolments:
Independent Tertiary Sector by Jurisdiction

▪ Australian Capital Territory	4,838	(29.1%)
▪ New South Wales	154,047	(56.9%)
▪ Northern Territory	2,218	(51.6%)
▪ Queensland	48,818	(50.6%)
▪ South Australia	19,803	(50.9%)
▪ Tasmania	8,734	(62.4%)
▪ Victoria	119,320	(53.7%)
▪ Nationally	378,287	(53.8%)

International education is a key contributor to the Australian economy. However, the importance of international education goes beyond its economic benefits. It facilitates meaningful cross-cultural exchanges, creates influential alumni networks and provides residency pathways for highly skilled graduates.

Australia's strengths in international education - our world-class education system and institutions, liveable cities, multicultural society, student protection mechanisms and strong graduate outcomes - remain strong incentives for students seeking an international education. Australia consistently ranks among the most popular study destinations for international students globally.

Student Enrolments:
International Students Independent Higher Ed.

▪ India	18,121	(32.0%)
▪ Nepal	14,984	(53.5%)
▪ China	8,346	(5.5%)
▪ Pakistan	3,110	(39.4%)
▪ Vietnam	2,840	(20.9%)
▪ Indonesia	1,345	(13.8%)

Student Enrolments:
International Students Independent Skills Training

▪ India	70,616	(99.2%)
▪ Nepal	28,670	(98.5%)
▪ China	16,733	(93.5%)
▪ Brazil	16,626	(97.0%)
▪ Columbia	16,029	(96.8%)
▪ Indonesia	15,588	(96.9%)

Just as independent providers embrace students from a full diversity of nations and experiences, those students who choose independent providers in Australia as part of their study journey are shown to have diverse study choices. While the independent sector supports a smaller overall proportion of international higher education students, their numbers have grown significantly across key disciplines including health and IT. In skills training, independent providers support over 80% of international students in more than seven key disciplines including engineering and technology, food & hospitality, IT and health as well as management and commerce.

International Education

Independent VET Student Enrolments - Field of Study (% Change 2017-2021)

■ Management & commerce	143,468	(+28.9%)
■ Food, hospitality and personal services	48,760	(+81.7%)
■ Society and culture	23,577	(+1.0%)
■ Engineering and related technologies	20,504	(+274.6%)
■ Information technology	7,863	(+26.1%)
■ Health	5,026	(-1.5%)
■ Creative arts	2,853	(+177.8%)

Reference Year: 2021 Source: Dept Education



Total International Students Tertiary Sector

Nationally, 53.8% of all international student enrolments are supported by independent providers.

SOURCE: Dept Education

International Education

Independent HE Student Enrolments - Field of Study (% Change 2017-2021)

■ Management & commerce	11,675	(-27.6%)
■ Information technology	14,962	(+168.3%)
■ Society and culture	4,565	(+133.6%)
■ Health	3,349	(+120.9%)
■ Creative arts	2,705	(-15.3%)
■ Engineering and related technologies	1,124	(-57.8%)
■ Food, hospitality and personal services	158	(+3060%)

Reference Year: 2021 Source: Dept Education



Total International Higher Education Students

17.5% of all international student enrolments in higher education are with independent providers.

SOURCE: Dept Education



Total International Skills Training Students

96.5% of international student enrolments in skills training are with independent providers.

SOURCE: Dept Education

The pandemic has been a difficult time for Australian business and international education has been particularly exposed. Reliant on the student visa process, the decline in total student visa numbers across all provider types has been damaging to the recovery. This has been particularly felt in the independent sector where those providers support 17.5% of higher education enrolments from student visa holders and in the skills sector they support 96.5% of enrolments.

International Education

Change in International Student Visa Numbers (March 2020 - September 2022)

	In Australia	Outside Aus	Total
■ Higher Education Sector	-80,032	-30,018	(-29.3%)
■ Vocational Ed and Training Sector	-41,821	-2,434	(-29.3%)
■ Schools Sector	-7,590	-2,014	(-42.9%)
■ Independent ELICOS Sector	-1,486	+2,611	(+3.9%)
■ Non-Award Sector	+2,529	-7,069	(-36.4%)
■ Postgraduate Research Sector	-2,638	-320	(-13.7%)
■ Student (Not Further Specified)	-8	-122	(-64.0%)
■ Grand Total	-139,034	-39,366	(-27.9%)

Source: Dept Education

Data Sources

ITECA STATE OF THE SECTOR REPORT

Australian Department Of Education

International student enrolment data
www.education.gov.au (Accessed October 2022)
 Higher education student data
www.education.gov.au (Accessed October 2022)

Australian Home Affairs

Student visa statistics
www.homeaffairs.gov.au (Accessed October 2022)
www.data.gov.au for updated data on higher education institutions
www.training.gov.au for updated data on Registered Training Organisations

National Centre For Vocational Education & Research

NCVER DataBuilder –Total VET Students & Courses
www.ncver.edu.au (Accessed October 2022)
 NCVER Government Funding of VET 2020 report and data tables
www.ncver.edu.au (Accessed October 2022)
 NCVER Research Report: *Understanding the Australian vocational education and training workforce*: Knight, G; White, I; Granfield, P. (2019)

Australian Trade and Investment Commission (Austrade)

Australian economic characteristics
www.austrade.gov.au

Australian Bureau of Statistics

National Public Accounts
www.abs.gov.au (Accessed October 2022)
 Population Statistics
www.abs.gov.au (Accessed October 2022)

Productivity Commission

www.pc.gov.au

Data Specific To Each State / Territory Jurisdiction:

- Training Services NSW,
- Victorian Department of Education and Training,
- Queensland's Department of Employment, Small Business, and Training,
- Western Australia's Department of Training and Workforce Development,
- South Australian Department of Education,
- Skills Tasmania,
- Skills Canberra
- Department of Industry, Tourism and Trade in the Northern Territory.

Understanding The Data

Government Skills Training Funding

There are some nuances to government funding distribution as described in this Report. While this Report describes funding as allocated by independent and public providers, a proportion of funding is also not attributable by RTO type.

The distribution of VET funding activity dollars by student and training information is dependent on the jurisdiction's VET funding flows. For example, total VET delivery has the following funding flows: subsidies for training, block funding, VET in Schools funding, other funding, funding from other organisations, fee assistance funding, learner needs funding, community service funding and operational base funding. Some of these activities do not directly attribute to the required student or training category but the dollars remain part of the training cost. These funds are captured and reported as not attributable funds and must be considered with the other reporting categories when evaluating the data tables.

As jurisdictions have different funding flows the total of not attributable funds reported can vary across the jurisdictions. For example, if funding has flowed to the provider under a community service, operational or block funding arrangement splitting these funds by the required student or training category may be impractical. Thus, the amount of not attributable reporting is related to the funding flow within a jurisdiction, and this will vary across jurisdictions so caution must be taken when analysing these data as the reported student or training category may be low due to large amounts of 'not-attributable' funds.

Skills Funding Distribution Over Time, Jurisdiction And Funding Per Annual Hour Of Delivery

The data collection covers the flow of government funds with each jurisdiction reporting on their own government funding flows. Data reflect government-funded VET activity of TAFE and other government providers, community education providers and other registered providers. It excludes the domestic and international fee-for-service activity of TAFE and other government providers, community education providers and other registered providers.

The data include payments received by states and territories for VET in schools programs.



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Independent **Higher Education**

Great For Students Great For Australia



The Independent Tertiary Education Council Australia (ITECA) is the peak body representing independent providers in the higher education, vocational education, training and skills sectors.

ITECA members are united, informed and influential. They are empowered with the information to make informed business decisions and the influence to drive reform.

If you're interested in working with others who share your commitment to quality in order to improve the reputation of the independent tertiary education sector, get involved in this growing community that shares your commitment to excellence.

ITECA Membership – It's a great time to get involved.

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ITECA Nationwide t: 1300 421 017 f: 1300 421 018	ITECA National Office a: GPO Box 1939, Melbourne, VIC, 3001 e: enquiry@iteca.edu.au
ITECA Australian Capital Territory a: GPO Box 450, Canberra, ACT, 2601 e: act@iteca.edu.au	ITECA New South Wales a: GPO Box 1493, Sydney, NSW, 2001 e: nsw@iteca.edu.au
ITECA Northern Territory a: GPO Box 1405, Darwin, NT, 0801 e: nt@iteca.edu.au	ITECA Queensland a: GPO Box 1182, Brisbane, QLD, 4001 e: qld@iteca.edu.au
ITECA South Australia a: GPO Box 1547, Adelaide, SA, 5001 e: sa@iteca.edu.au	ITECA Tasmania a: GPO Box 411, Hobart, TAS, 7001 e: tas@iteca.edu.au
ITECA Victoria a: GPO Box 1939, Melbourne, VIC, 3001 e: vic@iteca.edu.au	ITECA Western Australia a: PO Box Z5349, St Georges Tce, WA, 6831 e: wa@iteca.edu.au