

English Australia

# Maximising the ELICOS student experience

May 2012

Outcomes from the 2011 Australian English Language Barometer

&

A Practical Guide to marketing, administering, teaching and  
supporting students in the ELICOS sector





# Maximising the ELICOS student experience



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## Executive Summary

The ability to attract and retain international students is core business for English language colleges. In a competitive market, student satisfaction is a key indicator of sustainable enrolments. Satisfied English language students are more likely to provide recommendations to friends and families, which influences the decision process of potential students. In 2009, the Australian English language sector committed to a confidential, independent student feedback process using the international student barometer methodology. This research aims to gauge the level of student satisfaction with Australia's ELICOS providers.

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Student satisfaction is a key indicator of sustainable enrolments.

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On behalf of the ELICOS sector and as an initiative of English Australia with the support of the Australian government through Australian Education International (AEI), the first report for the English Language Barometer (ELB) was produced in 2009. In 2011, a representative sample of providers from the sector once again participated in the survey. This report provides a summary of the key outcomes as an aggregate report of all participating providers. In general, the report follows the format and structure of the ELB survey instrument: Marketing, Application, Living, Learning and Support.

Almost 9,000 students participated in the ELB in 2011, sourced from 49 ELICOS providers. While this was a downward trend of overall numbers compared with 2009 (reflecting the reduced number of providers that participated in the survey), there was an increased response rate of 66% of the population of participating colleges. The participating institutions represented a cross section of providers including university-based providers and private providers. Notably absent were the smaller private providers that participated in 2009.

The feedback from respondents to the 2011 ELB was very positive, with the overall aggregated satisfaction sitting at a very high standard and showing improvements on 2009 results. Over 87% of students were satisfied or very satisfied with their Australian English language experience, trending upwards by 6% from the 2009 result of 81% and above the Australian ISB result of 86%.

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Over 87% of students were satisfied or very satisfied with their Australian English language experience.

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Overall **learning** satisfaction results increased from 86% in 2009 to an impressive **91%** in 2011. Overall **living** satisfaction was also very high at **89%**, having risen from 86% in 2009, and the overall satisfaction for **support services** in 2011 was **83%**, an increase of 7% since 2009. Each overall satisfaction indicator is above the Australian ISB outcomes, indicating that the ELICOS sector is leading the industry in meeting students' expectations.

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The ELB is an aggregate of data reported from participating schools. Analysis of the individual institutions' data showed a significant variation in the level of satisfaction on individual items, in some instances greater than 50%. Areas with the greatest variation in maximum and minimum satisfaction included: technology (60% variation), transport to other places (54% variation) and advice on employment /career options (51% variation).

Areas with consistently high scores and limited variance across all providers included: easy to understand teachers (88 – 99%), friendly and approachable staff (90 – 100%), and fair and transparent assessment of work (87 – 98%).

The 2011 ELB report will be shared across the Australian ELICOS sector to encourage continuous improvement and enhance student satisfaction. English Australia, in conjunction with the ELICOS sector, will continue to build on and share this work into the future, in our efforts to strive for the highest level of satisfaction for our students.

## PART 1: SUMMARY OF ENGLISH LANGUAGE BAROMETER OUTCOMES

### 1. Summary of key findings

#### 1.1. Overall feedback

- Over 87% of students were satisfied or very satisfied with their Australian English language experience. This is an increase of 6% from the 2009 figure of 81% and above the Australian International Student Barometer (ISB) result of 86%.
- Overall learning satisfaction results have increased from 86% in 2009 to an impressive 91% in 2011. Overall living satisfaction is also very high at 89% - up from 86% in 2009 - and the overall satisfaction for support services in 2011 is 83%, up from 76% in 2009.
- 94% of students - an increase of 3% on the 2009 ELB – feel they have made progress in learning English since starting their course. When asked if they felt their course was value for money, 78% of respondents agreed. This was also up from 72% in 2009.

#### 1.2. Marketing

- A significant number of respondents (83%) indicated that Australia was their first and only country of choice when deciding where to study, indicating a slight improvement on the 2009 figure of 81%.
- For those that considered other countries, the key competitors were USA (5%) and the UK (4%). The US dropped slightly from 6% in 2009, whilst the UK remained the same. The Philippines has emerged as a destination option in 2011.
- Whilst there are many motivators for students to choose to study in Australia, the primary reasons given by respondents as motivations are English as the language of instruction (39%) and the opportunity for further education here after English studies (35%).
- The primary influence - with over 40% - in the selection of an individual provider was personal recommendation. Whilst indicating a slight drop from 42% in 2009, this factor remains very high.
- Reputation of the school (31%) as a factor in selecting an educational provider increased slightly from 2009; so too did the provision of entry to a university for further study (25%).
- 52% of respondents cited education agent or consultant as the main influence in making their final choice of course or place of study, decreasing only 1% from 2009. Friends (25%), alumni (21%) and parents (15%) remain the next influential factors, unchanged since 2009.
- Preparation for further study is the main reason for studying, rising from 48% in 2009 to 53% in 2011. The improvement of future employment opportunities was the next main reason for study at 22%, dropping down from 26% in 2009.
- 27% of respondents are undecided in what they will do after their studies are complete. 10% want to travel or take some time off, with only 14% considering employment options. 39% of students will continue their studies within the country, either at their existing institution (22%) or another institution (17%). Only 5% will return home to continue study.

## 1.3. Application

- 85% of respondents were residing in their home country prior to commencing study in Australia. 11% were already residing in Australia.
- The majority of respondents (87%) held a student visa, while 10% held either a tourist or working holiday visa. Packaging English Language Intensive Courses for Overseas Students (ELICOS) with other courses is the most used visa for 47% of respondents to the 2011 ELB, having risen from 40% in 2009. Independent ELICOS Visas have dropped from 45% in 2009 to 40% in 2011.
- Direct online applications (10%) and those via a university (12%) have both increased in the 2011 ELB results; however, applying with the assistance of an education agent remains the most common application method at 68%, with 87% rating the service they received from an agent as very good (28%) or good (59%).
- There has been an increase of 4% in first time, quick and easy enrolment applications, from 71% to 75% between 2009 and 2011 ELB.
- There has been an increase from 82% to 87% for those indicating very good and good satisfaction with the application support provided. The ELB matches the ISB (87%) in this area.

## 1.4. Satisfaction ratings

### *Living*

- Satisfaction scores for all 18 elements of living are high and generally improving, with the largest improvement recorded in opportunities to earn while studying (+14%). The most significant drawback of living in Australia is the high level of dissatisfaction with the cost of living and the cost of accommodation.
- The only three elements showing a decreased satisfaction since 2009 were the cost of living (decreasing by 4%), transport links to other places (decreasing by 2%), and the weather (decreasing by 6%).

### *Learning*

- Satisfaction scores in all 18 learning elements are generally high, and they have all improved since 2009 by an average of 5 percentage points.
- The greatest satisfaction (with levels of over 89%) is with all aspects of teaching, feedback, assessment, personal support from teachers, and course content.
- The lowest satisfaction is with flexibility of study, with non-classroom activities to help learn English and opportunities for work experience as part of their course.

### *Support*

- The satisfaction levels for support are generally high and all elements show marked improvement since 2009 (+7% overall).
- The highest satisfaction is with help and support with visa applications (88%) and advice on further study (85%). Conversely, satisfaction was lowest with advice in relation to part-time work (68%).

### *Recommendation*

- 78% indicate that they would encourage others to apply to their college and only 4% would discourage others. As with other scores, these show an improvement since 2009 and are marginally better than the ISB scores.
- 82% indicate that they would encourage others to apply to study in Australia and only 4% would discourage others.



## 1.5. Assessment of minimum and maximum results

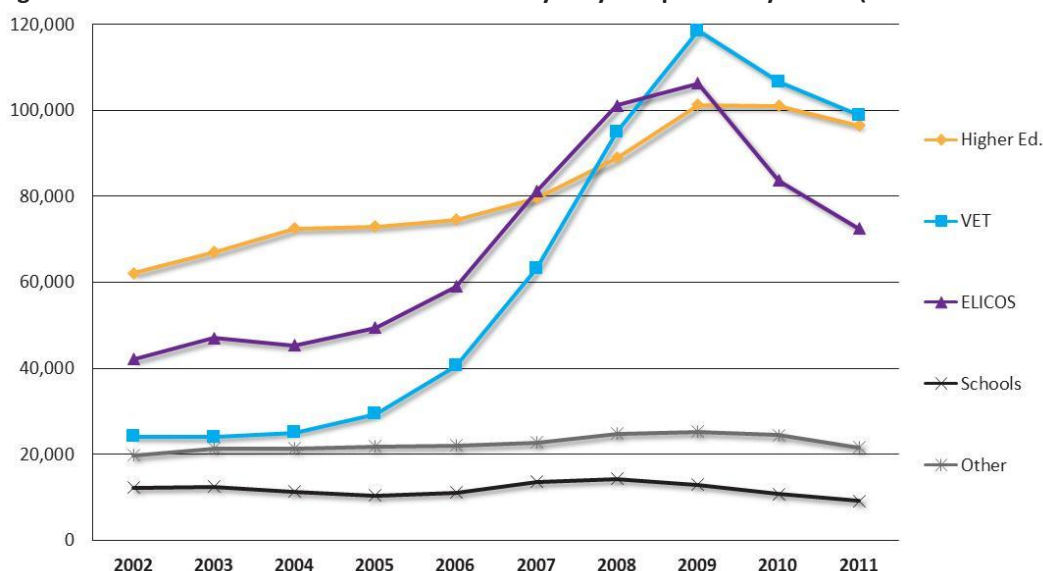
- The ELB is an aggregate of data reported from participating schools. Analysis of the individual institutions' data shows significant variation in the level of satisfaction on various items. The most significant of these is satisfaction with technology usage.

## 2. Introduction

Students are attracted to Australia as a study destination for a variety of reasons, including access to quality institutions and courses, proximity, safety, affordability, a welcoming Australian community, and the potential for migration. Educational services have grown to become one of Australia's largest services export industries, generating over \$18 billion dollars in export revenue at its peak in 2009-10<sup>1</sup>. Export income from the ELICOS sector contributed over \$1.8 billion<sup>2</sup> at its peak in 2008.

The past few years have been challenging times for Australia's international education sector. A number of factors have resulted in the first significant systemic decline and reduction in student numbers since the sector developed. The ELICOS sector was significantly affected in this downturn. Factors causing this trend include the global financial crisis, the high Australian dollar, significant domestic regulatory reforms, and intense international competition. In addition to these, there was extensive negative publicity around international student safety in Australia in 2009. The table below shows the performance of the different sectors when government data for commencements of student visa holders is considered.

**Figure 1: International student commencements yearly comparison by sector (student visa holders)**



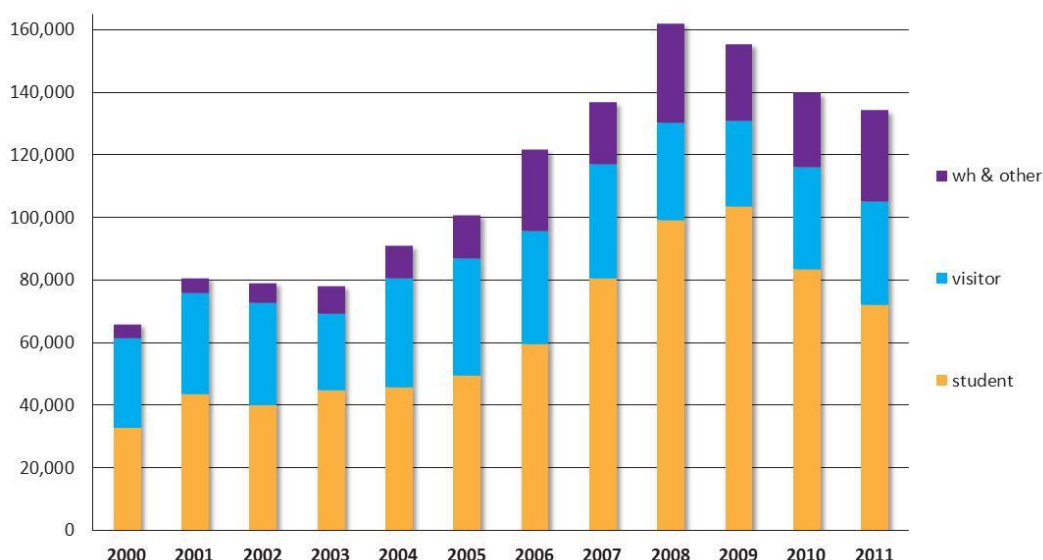
<sup>1</sup> Australian Education International (2011) Research Snapshot Export Income to Australia from Education Services in 2010-11.

<sup>2</sup> English Australia (2009) Survey of Major ELICOS Regional Markets in 2008

# Maximising the ELICOS student experience

The severe decline seen in numbers of student visa holders in ELICOS has been somewhat mitigated by stability and even growth in numbers of other visa holders over this period, as shown in the following chart. Nonetheless, the ELICOS sector has declined by 17% over the last three years, dropping from a peak of 162,114 students in 2008 to 134,440 in 2011<sup>3</sup>.

**Figure 2: ELICOS student commencements yearly comparison by visa type**



Despite this, predictions indicate continued international growth in student mobility. Over the past three decades the number of international students has quadrupled, from 0.8 million (1975) to 3.3 million (2008).<sup>4</sup> Since the late 1990s, growth has accelerated; in 2008 alone, global growth was up 11% from the previous years and the OECD predicts that between 4.1 million to 6.7 million students will be studying abroad by the year 2020.<sup>6</sup>

The ability to attract and retain international students is core business for English language colleges. In a competitive market, student satisfaction is a key indicator of sustainable enrolments. Satisfied English language students who are more likely to provide recommendations to friends and families significantly influence the decision process of potential students.

Now is a critical time for the ELICOS sector to ensure a focus on student satisfaction as a means to provide successful outcomes for their students, to encourage and foster recommendations, and to support the ability of Australian providers to sustainably attract and retain international students.

The English Language Barometer (ELB) is a critical tool that providers and the sector can employ to understand the level of success in meeting students' expectations. Providers can analyse the outcomes to leverage their strengths and address possible weaknesses and to continue to improve services.

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Now is a critical time for the ELICOS sector to ensure a focus on student satisfaction.

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<sup>3</sup> English Australia (2012) Survey of Major ELICOS Regional Markets in 2011

<sup>4</sup> OECD (2010). *Education at a Glance*, p. 32. UNESCO (2009) estimates a total of 2.8 million international students globally in 2007. While estimates may vary, being based on different parameters, the overall trend towards significant continuing growth is evident.

<sup>5</sup> OECD (2010). *Education at a Glance*, p. 32.

<sup>6</sup> Calderon, A. (2010). *Emerging countries for student recruitment in tertiary education*. Paper presented to the IMHE-OECD Conference, Higher Education in a World Changed Utterly: Doing More with Less, Paris September 2010, p. 6.

## 3. Overview of the research



Since 2005, i-graduate (through the International Student Barometer) has tracked and reported feedback from over 500,000 international students across more than 200 countries. The ISB is an independent and confidential feedback process for education providers, tracking the decision-making, perceptions, expectations, and experiences of their international students.

The ISB survey covers six main areas:

1. enquiry and application process
2. arrival and orientation
3. learning experience
4. living experience
5. support services
6. recommendation of the overall experience

In 2009, Australian English language providers committed to giving students a voice using a confidential, independent feedback process within the international student barometer methodology. Planning for the English Language Barometer (ELB) commenced in 2008 as an initiative of English Australia on behalf of the ELICOS sector. The Australian Commonwealth Department of Education, Employment and Workplace Relations (DEEWR) (now the Department of Industry, Innovation, Science, Research & Tertiary Education - DIISRTE) supported the initiative, and the first report was produced in 2009. In 2011, a representative sample of providers from the sector once again participated in the survey. This report provides a summary of the key outcomes as an aggregate report of all participating providers.

### 3.1. Purpose of the English Language Barometer (ELB)

The purpose of the ELB is to provide an analysis of international student perceptions, attitudes and experience in English Language Colleges in Australia based on the 2011 national survey and compared with the survey data from 2009. To achieve this, the i-graduate Australia English Language Teaching International Student Barometer (ELT ISB) survey instrument was used.

An assessment of effectiveness is made at a systemic and institutional level through the ELB. Analysis of the ELB results allows providers to benchmark themselves against other providers and to improve resource management within the individual colleges and across the sector.

This report is intended to contribute to the continuing discussion initiated by the sector with the support of Australian Education International. The outcomes also help the sector to identify possible co-operative and collaborative sectoral and cross-sectoral actions to improve market penetration. The purpose of this report is to support the continuous improvement of the ELICOS student experience, based on comparative student data.

## 3.2. Research Methodology

The English Language Barometer (ELB) was undertaken from 3rd October to 25th November 2011 in 49 English Language Colleges in Australia to capture opinions of the international student cohort. Findings are benchmarked against the Australian ELB 2009 dataset to show changes in opinion and experiences between academic years.

The lists of participating institutions in 2009 and 2011 are included in the appendices. The 2011 ELB findings are also compared to the 2011 Australian International Student Barometer (Aus ISB 2011) – a study of satisfaction amongst a broader group of international students at 28 Universities in Australia which was undertaken from 14th March to 20th May 2011.

## 3.3. Approach to this report

This report is structured in three parts; part one is a summary of the ELB findings. The responses collected from individual ELICOS providers have been aggregated to provide an overall indicative view of the Australian ELICOS sector.

Part two aims to consider the key themes emerging from the ELB and describes ways that providers might address these targeted areas to ensure continuous improvement of the students' experience. A set of checklists has been developed to allow providers to undertake an assessment of their current position and identify opportunities for improvement.

Part three provides a set of practical templates, tools and information to assist providers to address areas of concern.

In general, the report follows the format and structure of the ELB survey instrument, but some of the areas have been collapsed to provide a sequential framework that follows the students' journey:

### **Marketing > Application > Living > Learning > Support**



Where relevant, the report uses a stoplight approach to reflect the importance of particular issues; green to depict positive activities where providers are performing well, amber to demonstrate areas that need to be monitored, and red to indicate areas of weakness that should be addressed.

## 3.4. The Next Steps

To support continuous improvement across Australia's ELICOS sector, the outcomes of the ELB research and this report will be shared with the sector through various channels. This will include presentations on the key findings at the 2012 NEAS Conference in May and the 2012 English Australia Conference in September. English Australia, in conjunction with some of the participant colleges, also intend to prepare a set of good practice case studies based on the key focus areas outlined in this report. These will also be shared with the sector to support efforts to achieve the highest levels of satisfaction from our students.

## 4. Survey Outcomes

### 4.1. Overall Satisfaction – A Very Positive Report

Overall learning satisfaction results have increased from 86% in 2009 to an impressive 91% in 2011. Overall living satisfaction of 89% is also very high having risen from 86% in 2009. The overall satisfaction for support services has also increased from 76% in 2009 to 83% in 2011. Each overall satisfaction indicator is above the Australian ISB outcomes, indicating that the ELICOS sector is leading the industry in meeting students' expectations.

The feedback from respondents to the 2011 ELB has been very positive, with the overall aggregated satisfaction at a very high standard and showing improvements on the 2009 results. Over 87% of students were satisfied or very satisfied with their Australian English language experience, an increase of 6% from the 2009 result of 81% and higher than the Australian ISB result of 86%.

Each overall satisfaction indicator is above the Australian ISB outcomes, indicating that the ELICOS sector is leading the industry in meeting students' expectations.

	Overall: Very satisfied/ Satisfied	Learning: Very satisfied/ Satisfied	Living: Very satisfied/ Satisfied	Support: Very satisfied/ Satisfied
Aus ELB 2011 (8243)	87%	91%	89%	83%
Aus ELB 2009 (9904)	81%	87%	86%	76%
Aus ISB 2011 (37832)	86%	83%	86%	-

Student responses to questions relating to outcomes were also very positive. 94% of students feel they have made progress in learning English since starting their course, increasing 3% from the 2009 ELB. When asked if they felt their course was value for money, 78% of respondents agreed. This was also up from 2009.

	ELB 2011	ELB 2009	Difference
I have made progress in learning English since beginning this course of study	94%	91%	+3%
I feel that my English course offers value for money	78%	72%	+6%
Studying English in this country has been better than I expected	77%	69%	+8%

It is beneficial for the sector to continue to share these positive outcomes and approaches, and continuous improvement by individual providers can support the sector's continued success.

## Verbatim comments

"All of teachers are very **conscientious in their work**. Although I only studied 4 weeks in here, I think **my English has improved**."

*Student, China*

"Because I enjoy my time in Australia and my **teachers are very good** and they are **like my family** they love me and care about me."

*Student, Kuwait*

"Because, I've found many difference between Australian and Japanese education systems. **In Australia, I don't need to care about making a mistake**. I can **ask questions to my teacher anytime I want**. Therefore, **I can understand many things about English more clearly than when I was in Japan**. Moreover the **teachers are also wonderful**. They are always work-hard for us. For example, they teach me just one thing again and again until I understand even if they spend the whole a class for it. That's why, I can focus on my study more and more and **improve my English skills step by step**."

*Student, Japan*





## 4.2. Profile and Responses

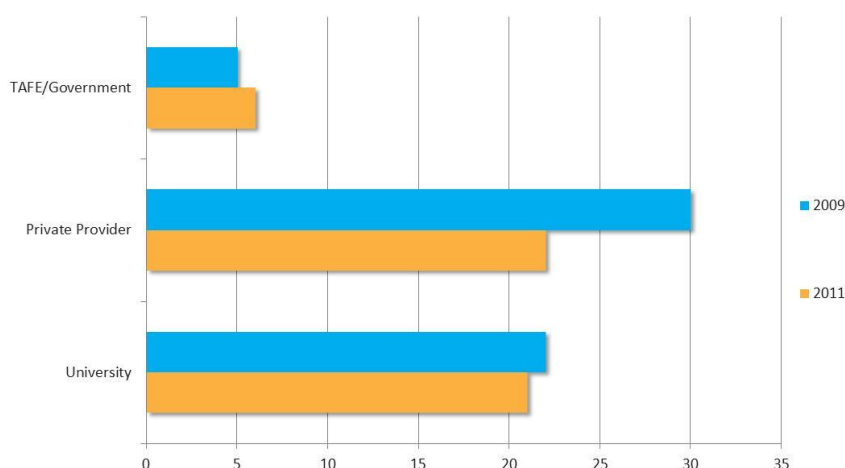
### 4.2.1. Respondents

Almost 9,000 students participated in the ELB in 2011, sourced from 49 ELICOS providers. Whilst this is a reduction in overall numbers since 2009 (reflecting the reduced number of providers that participated in the survey) the 66% response rate of the population of participating colleges was higher, more than double the response rate for the ISB.

- 2009 - 57 colleges, 10,716 students – 28% of sector – 50% of population of participating colleges
- 2011 - 49 colleges, 8,722 students – 26% of sector – 66% of population of participating colleges

The participating institutions represented a cross section of providers from larger university-based providers to private providers. Notably absent were the smaller private providers that participated in 2009. This could be linked to financial and time constraints of participating in the research.

**Figure 3: Percentage of ELB institutional participants by sector by year**



Respondents' age ranges mirrored the overall student cohort and was consistent with 2009 survey findings, with 83% of all respondents aged over 18 and under 30 years. The largest respondent cohort of 52% came from students aged between 20 and 23 years. The gender of respondents was evenly spread with 51% of respondents being female and 49% male, correlating with 2009 responses.

Whilst there are some anomalies between the Australian ELICOS student cohort and the survey population, the response rate is sufficient to allow for robust analysis and interpretation of the data. It must also be noted that the data provided is an aggregate of a number of individual providers' responses, which needs to be considered when assessing the overall results. Despite this, the data provides good insights and observations on the Australian ELICOS experience.

	Number of Providers	Response
AUSELB 2011	49	8,772
AUS ELB 2009	57	10,716
AUS 2011 ISB	39	36,308
International ISB	162	121,834

# Maximising the ELICOS student experience

## 4.2.2. Nationality

A total of 119 nationalities participated in the 2011 ELB research. Of these, 58% came from the key source markets of China, Korea, Japan and Saudi Arabia. In line with enrolment figures, Asia continues to dominate the Australian ELICOS sector.

In 2011 over 134,000 students studied ELICOS programs in Australia. While the actual number of ELICOS students enrolled varies each quarter, it is approximately 25 percent of the total enrolment. Students may be on student visas (approximately 54 percent of the cohort); tourist visas (24%); or working holiday and other visas (22%). The response rate is estimated at 26 % of the total ELICOS enrolment during the survey period and 66% of the enrolment in the participating colleges, compared with 50% in 2009. While acknowledging the limitations of these estimates, it is clear that the data relates to a significant sample of the total numbers of ELICOS students enrolled at the time the ELB was conducted.

Although there are some variations in the profile of the sample compared with that of the general ELICOS population, the sample provides a valuable source of feedback on the student experience. Particular questions, however, may need to be analysed with the variations identified below in mind.

2011 ELT student population		Australian ELB 2011		Comments
134,439 = 33,610 per quarter		8,722		<ul style="list-style-type: none"> <li>Estimated approx 26% of student population</li> </ul>
54% student visas 46% non-student visas		87% student visas 13% non-student visas		<ul style="list-style-type: none"> <li>Students on non-student visas are under-represented in the sample. These students generally are on short courses and may not have the incentive to respond to a survey such as this. This was a similar issue for the 2009 ELB.</li> </ul>
China	20%	China	34%	<ul style="list-style-type: none"> <li>In general most of the top source nationalities are represented in the sample.</li> <li>One significant exception is European countries. Either the colleges participating in the survey did not have European students enrolled or this cohort of students chose not to respond.</li> <li>Students from Saudi Arabia are over-represented in the sample, with South Korea and Japan under-represented.</li> </ul>
South Korea	15%	South Korea	8%	
Japan	15%	Japan	8%	
Brazil	7%	Brazil	4%	
Thailand	5%	Thailand	3%	
Taiwan	4%	Taiwan	4%	
Colombia	4%	Colombia	3%	
Switzerland	3%			
Saudi Arabia	3%	Saudi Arabia	8%	
Vietnam	3%	Vietnam	4%	
Italy	3%			
France	2%			
Germany	2%			
Indonesia	2%	Indonesia	2%	
Average course length = 11.2 weeks		27% studying more than 24 wks 37% studying 13-24 weeks 36% studying less than 13 wks		<ul style="list-style-type: none"> <li>Students on longer courses are over-represented in the sample. They would have more invested in their course and would be more likely to respond to a survey than students on short courses.</li> </ul>



# Maximising the ELICOS student experience



Analysis of AEI pathway data indicates that approximately 40% of ELT students will transition to further study in another education sector.

48% EAP  
36% General English  
16% Other

- The sample seems to be generally representative of the overall ELT sector profile, with a slight over-representation in academic pathway English.

The majority of students were of Asian origin, and 8 of the top 10 nationalities represented are Asian. The breakdown by nationality shows dominance by China, with more than a third of the respondents.

Nationality	2011	2009	Difference
China	34%	23%	+11%
South Korea	8%	14%	-5%
Japan	8%	7%	+1%
Saudi Arabia	8%	13%	-5%
Vietnam	4%	9%	-4%
Taiwan	4%	4%	-0%
Brazil	4%	5%	-1%
Thailand	3%	5%	-1%
Colombia	3%	4%	-1%
Indonesia	2%	1%	+1%
Other	21%	16%	+5%
<b>Base</b>	<b>8772</b>	<b>10716</b>	<b>-1944</b>

*Note: Percentages have been rounded to the nearest whole number*

There has been a significant increase in the proportion of students from China compared with the 2009 ELB (+11%), and as a result most other national groups have decreased relatively in size. It is notable that 79% of the Chinese students are preparing for further study, but only 53% of the total student body. On the one hand, this suggests a more uniform sub-group of Chinese students; the +5% increase in the 'other' category suggests some diversification outside the Chinese sub-group.

Nearly half of respondents (48%) were studying English for Academic Purposes (EAP), while 36% of respondents were studying General English. Much smaller groups (3% or less) were studying for specific purposes, mainly examinations such as IELTS or a Cambridge Examinations Preparation course. Over 50% stated their main reason for English language study was preparation for further study, while 33% cited employment-related reasons. The great majority of students were studying full-time in courses of around 24 weeks.

Respondents mainly funded their studies through their family (60%) or their own funds (34%), which is broadly comparable to the situation in 2009 (58% and 31% respectively).

The majority of respondents (87%) held some form of student visa (either ELICOS packaged or Independent ELICOS). The majority of respondents (98%) stated their application was accepted first time, and 86% of respondents were either satisfied or very satisfied with the visa application process. Notwithstanding this generally positive response, 23% considered the process to be lengthy and difficult.

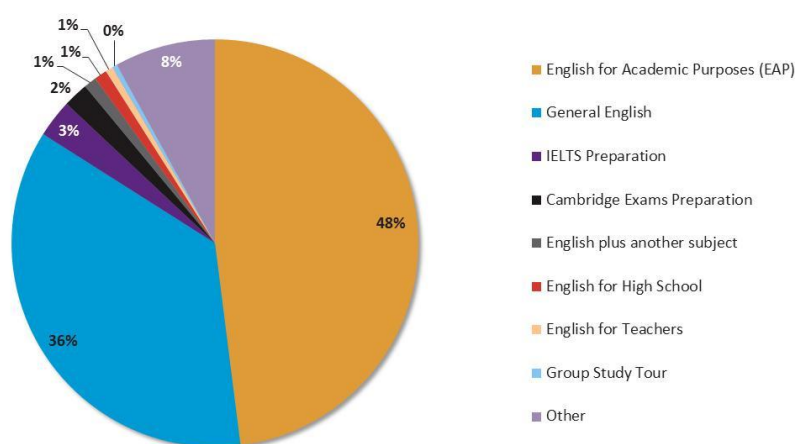
# Maximising the ELICOS student experience

## 4.2.3. Course of Study

The two main courses undertaken in 2011 were *English for Academic Purposes (EAP)* at 48% and *General English* at 36%. There were several other courses studied by only 1% - 3% of respondents; no response was received from respondents undertaking a *Group Study Tour* and 8% indicated another course.

In 2011, EAP increased by 10% to 48% of respondents, while *General English* decreased by 10%. This reflects the change in provider participation to a greater number of university-based providers - presumably with pathway programs - as well as the predominance of student visa holders who responded to the survey.

**Figure 4: What type of course are you currently studying?**

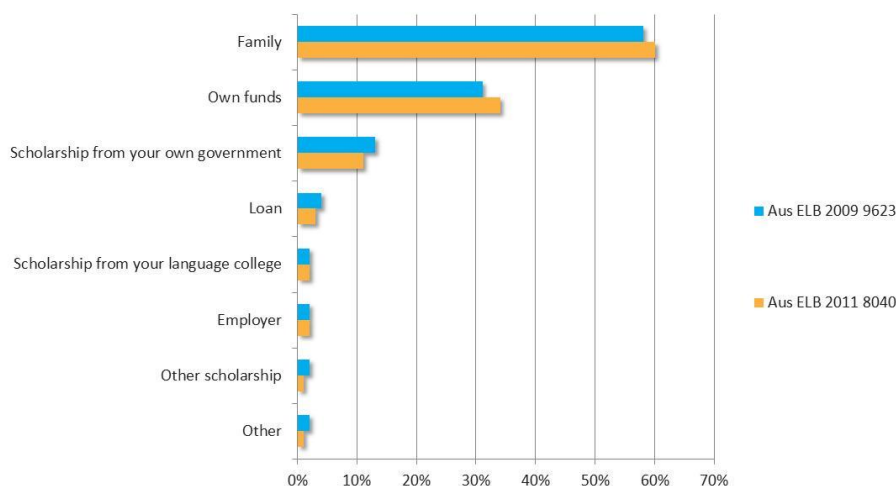


Course	2009 ELB	2011 ELB	Difference
English for Academic Purposes (EAP)	38%	48%	+10%
General English	46%	36%	-10%
IELTS Preparation	2%	3%	+1%
Cambridge Exams Preparation	1%	2%	+1%
English plus another	1%	1%	-
English for High School	3%	1%	-2%
English for teachers	1%	1%	-
Group Study Tour	1%	0%	-1%
Other	7%	8%	+1%

## 4.2.4. Funding of study

Funding for study has remained very similar in 2011 as in 2009. Funding from family was once again the main source for 60% of respondents. The next highest source of funding was respondents using their own funds, increasing 3% from 2009 to 34% in 2011. There was a slight decrease to 11% in funding from government scholarships, while only 2% received scholarships from their attending school. Saudi Arabia (79%) and Libya (96%) were significant markets for government scholarships, as was Indonesia (12%).

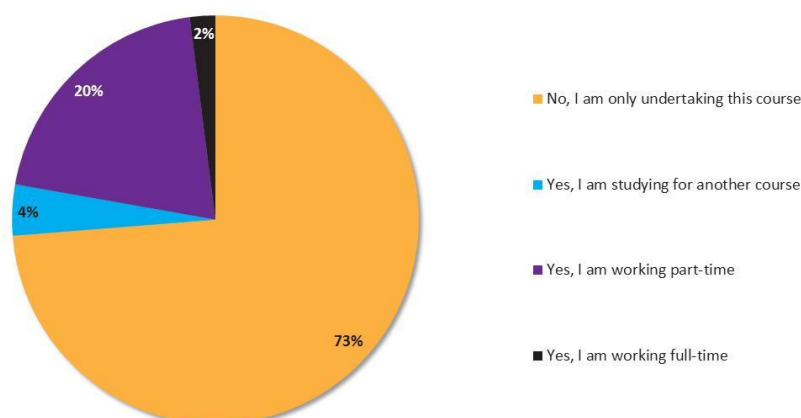
**Figure 5: How are you funding your studies?**



## 4.2.5. Study and Employment

The majority of respondents (73%) are not working while studying. 20% are working part-time while studying. 2% are working full time and 4% are studying for another course.

**Figure 6: Are you working or studying in addition to studying for your English language course?**



## 4.3. Marketing

Understanding why a student chooses what to study and where to study can assist providers' efforts to customise courses, develop targeted communication strategies, and ensure the development of informed strategies that deliver outcomes and sustainability. This section considers student expectations and decision processes, which provides insight to assist institutions to best position themselves to appeal to students' interests and needs. The section considers:

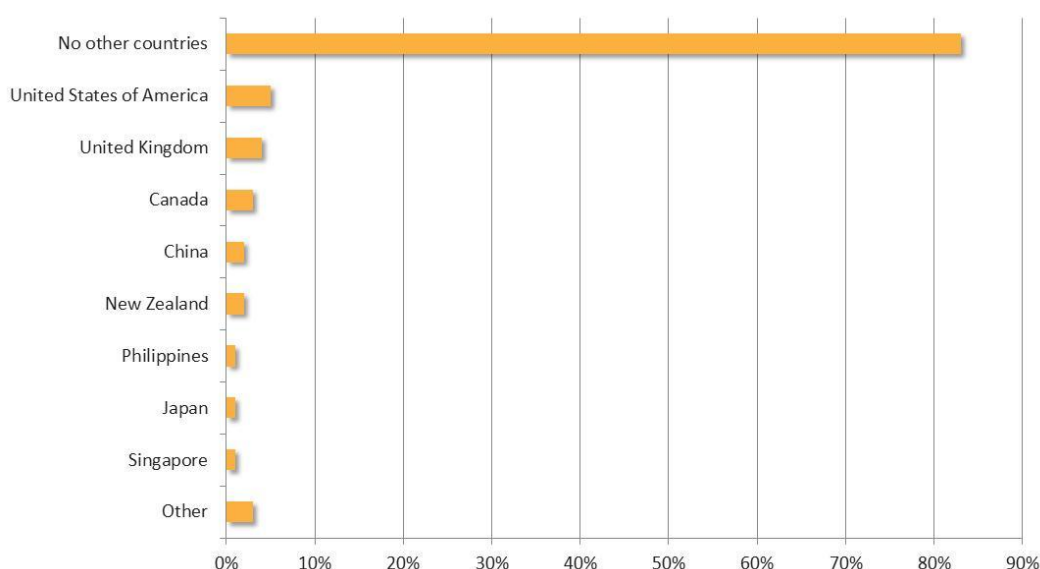
1. country selection
2. provider selection
3. influencers in decision-making
4. reasons for study
5. plans post study

### 4.3.1. Country Selection

A significant number of respondents (83%) indicated that Australia was their first and only country of choice when deciding where to study. This is slightly up from 81% in 2009. For those that considered other countries, the key competitors were USA (5%) and the UK (4%). The US dropped slightly from 6% in 2009, while the UK remained the same. The Philippines has emerged as a destination option in 2011.

Respondents from Indonesia, Vietnam and Thailand were most likely to select Australia as their first country of choice, while Colombian and Taiwanese students were more likely to have alternative study destination options.

**Figure 7: Did you apply to study at any language centres / schools in other countries?**



# Maximising the ELICOS student experience



Was this country your first choice for language study?					
Where are you from?	No	Yes	(blank)	Grand Total	% Yes
Indonesia	12	135	21	168	80%
Vietnam	49	299	45	393	76%
Thailand	38	224	31	293	76%
China	590	2192	240	3022	73%
South Korea	169	503	65	737	68%
Hong Kong SAR (PRC)	36	88	7	131	67%
Saudi Arabia	153	437	72	662	66%
Brazil	82	212	30	324	65%
Japan	181	460	77	718	64%
Taiwan	103	235	34	372	63%
Colombia	77	159	26	262	61%

## 4.3.2. Reasons for Country Selection

While there are many motivators for students to choose to study in Australia, the primary reasons respondents gave as motivations were English as the language of instruction and the opportunity for further education after English studies. While the fact that Australia is an English speaking country has slightly reduced in importance, the desire for further study opportunities increased slightly from 33% to 35%. Despite significant negative publicity around safety and security concerns for international students in 2009 and 2010, 27% of respondents chose Australia due to safety and this did not change in the 2011 survey. Only 8 individual respondents of the 2,128 from India cited safety as a motivating factor.

Other notable motivational changes included 5% fewer students than 2009 (14%) choosing the destination due to the easy visa application. The perceived value for money motivator reduced to just 12% in 2011, down from 17% in 2009. Opportunities to work during or after study increased 3% since 2009, to 27% in 2011.

Regarding the key motivations of lifestyle, education quality and cost factors, lifestyle and quality appear to outweigh cost considerations, and the majority of respondents selected lifestyle considerations above others.

In support of this, Austrade's new education brand, Future Unlimited, aims primarily to reposition Australia away from affordability and lifestyle factors to highlight quality education outcomes and lifelong benefits instead. English Australia's new branding also focuses on "quality, support, assurance". Despite this, cost factors must not be overlooked as funding for study comes primarily from family and students' own funds and many of the issues identified in the 2011 ELB relate to cost considerations. Value for money will continue to be an important consideration.

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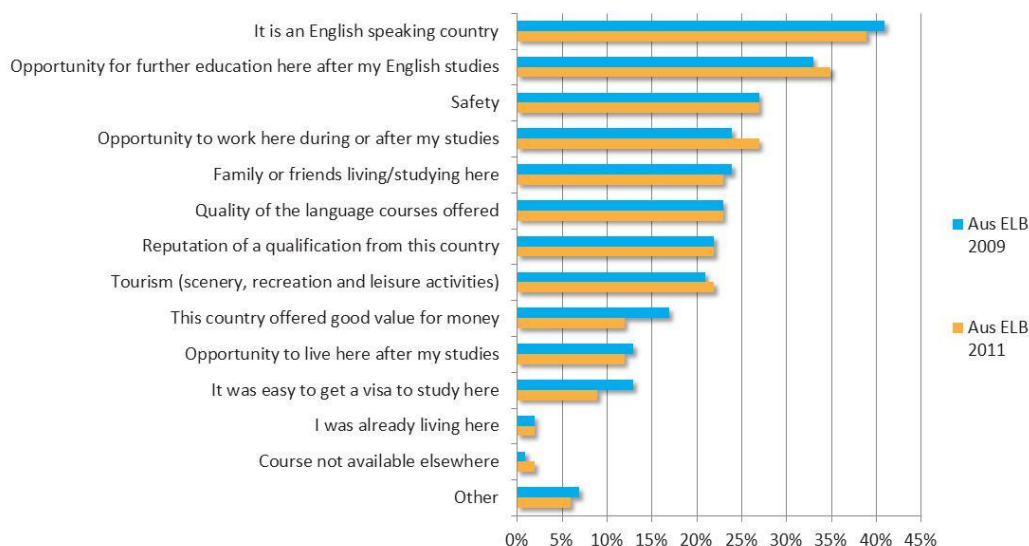
Value for money will continue to be an important consideration.

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# Maximising the ELICOS student experience

Based on country specific data, individuals from Russia, Thailand, Brazil and Vietnam were more likely to have English speaking country as a motivator over individuals from China, India, Malaysia and Indonesia. This information is helpful to ensure key messages in positional material are developed so as to target the motivations of students.

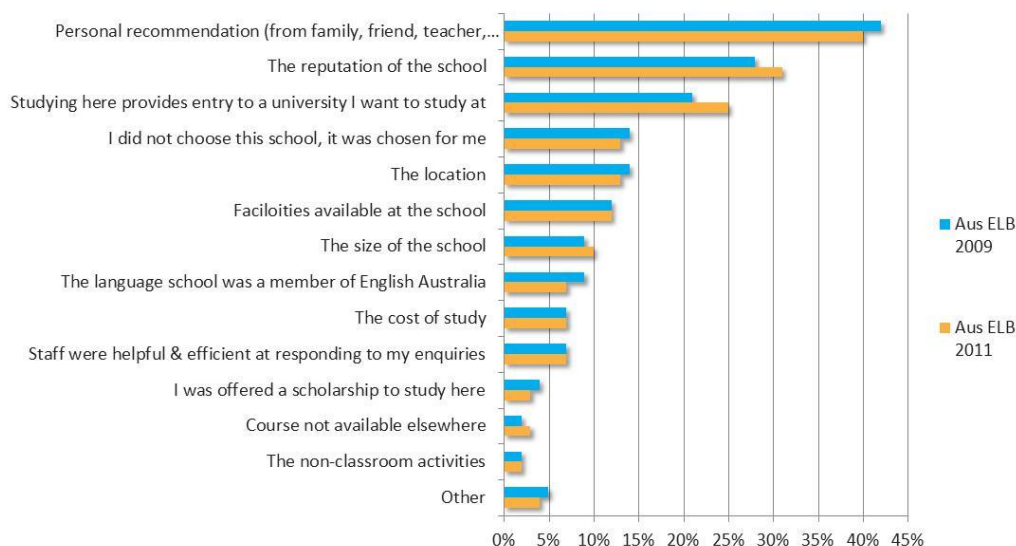
**Figure 8: Why did you choose to study an English language course in this country?**



## 4.3.3. Provider Selection

To determine the influencers in provider selection, students were asked about influences on their decisions to choose an educational provider. The primary influencer - at over 40% - in the selection of an individual provider was personal recommendation. This indicated a slight decrease from 42% in 2009; however, it remains very high, which highlights the need to leverage the benefits of word of mouth and the increasing importance of social media. The reputation of the school as a motivational factor increased slightly in 2011 compared to 2009, as did providing options to enter university.

**Figure 9: Why did you choose to study an English language course at this school?**



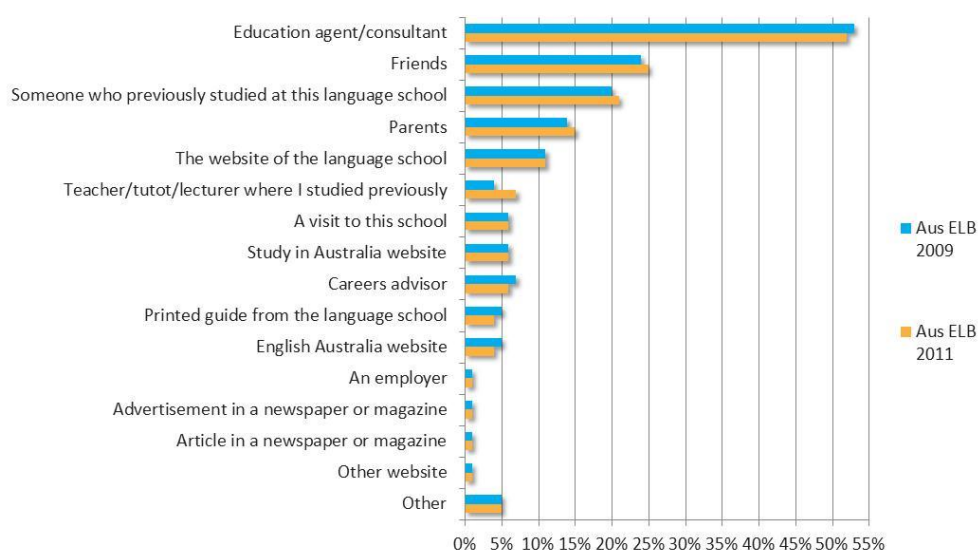
## 4.3.4. Influencers in Study Selection

The relationship between a prospective student and their education agent remained the main determining factor in the student decision-making process of where to study. 52% of respondents cited *education agent or consultant* as the main influence in making their final choice of course or place of study, down only 1% from 2009. *Friends* (25%), *alumni* (21%) and *parents* (15%) remain the next influential factors, as they were in 2009. All of the figures were within 1% from 2009, with only *teacher/tutor/lecturer where I studied previously* rising from 4% to 7%.

Students from China, Brazil, Turkey and Columbia were most likely to use an agent, while students from Saudi Arabia and parts of Europe were the opposite. Friends played a significant role in the decision-making process for students from India and countries in the Middle East.

In regard to accessing course and provider information, 25% of students sourced this from websites or providers printed material. The website of a provider and various referral sites such as *Study in Australia* and *English Australia* continued to be an important source of information for students. Providers should have a well-conceived and articulated online strategy. 85% of students applied to study from their home country and as such, influencers in the decision process offshore should feature in marketing efforts.

**Figure 10: Which of the following helped your decision to choose this school?**



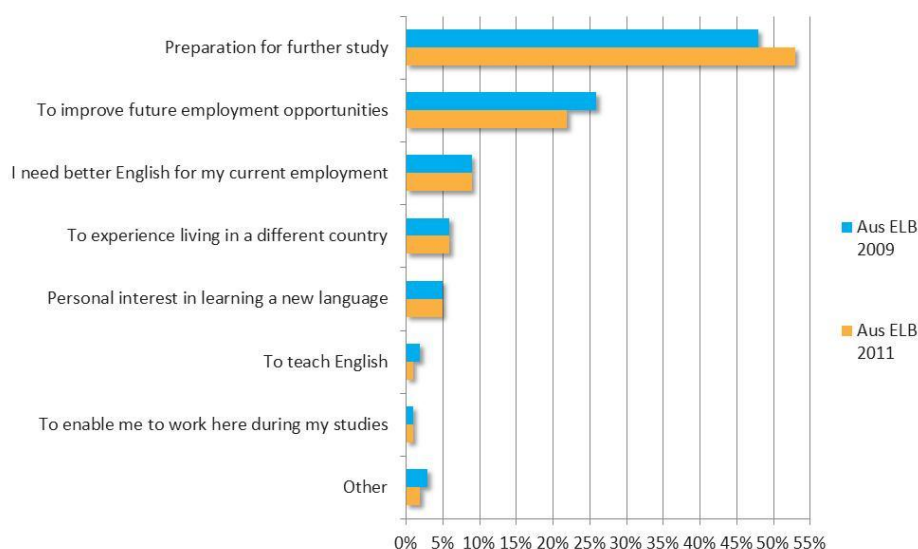
## 4.3.5. Reason for Study

The data showed that the reasons for study in 2011 were very similar to those from 2009, with two main reasons. *Preparation for further study* once again being the main reason for studying, up from 48% in 2009 to 53% in 2011, followed by *To improve future employment opportunities* at 22%, down from 26% in 2009.

79% of Chinese students were learning English primarily as preparation for further study, compared to 33% of South Korean students and 15% of Japanese students. Students from South Korea were both studying as preparation for further study and to improve future employment opportunities whereas Japanese students main reason was to improve future employment opportunities (32%). 19% of Japanese students were learning English for personal interest. 17% of Japanese and 10% of South Korean students were learning English to experience living in a different country, compared to 3% of students from China. This data should be taken into account when tailoring messages in marketing material for targeted markets.



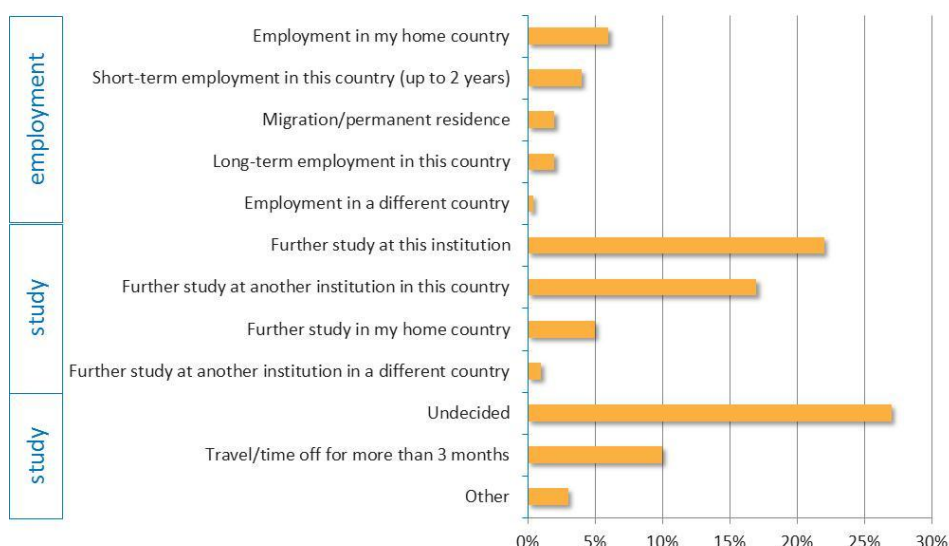
**Figure 11: What is the main reason that you chose to study an English language course?**



## 4.3.6. Plan for after Studies

27% of respondents were undecided in what they would do after completing their studies. 10% wanted to travel or take some time off, with only 14% considering employment options. 39% of students indicated they would continue their studies in Australia, either at their existing institution (22%) or another institution (17%). Only 5% reported that they would return home to continue study. These findings provide interesting data in regard to the importance of pathways, partnerships and the availability to target individuals who are undecided.

**Figure 12: What do you plan to do after your current course of study?**



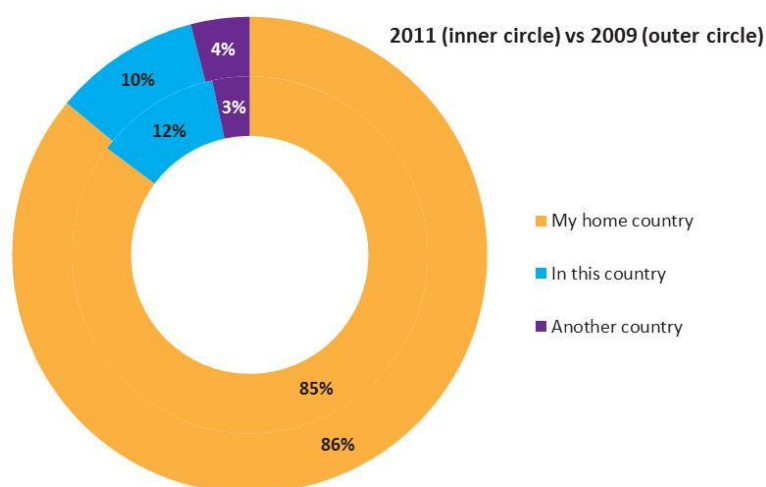


## 4.4. Application

### 4.4.1. Location before commencement of study

85% of respondents were residing in their home country prior to commencing study in Australia. 11% were already residing in Australia. There has been minimal change since 2011. These results indicate marketing efforts continue to be targeted at the home country of residence.

**Figure 13: Where were you before you began your current course of study?**



### 4.4.2. Visa Category

The majority of respondents (87%) held a student visa, while only 10% held either a tourist or working holiday visa. ELICOS packaged with other courses was the most used visa for respondents to the 2011 ELB with 47% of respondents, increasing from 40% in 2009. Independent ELICOS Visas dropped from 45% in 2009 to 40% in 2011. Whilst 46% of the overall ELICOS student population hold visitor or working holiday visas, this cohort continues to be under-represented in the Barometer surveys.

Course	ELB 2009	ELB 2011
Student Visa (ELICOS Packaged with other Courses)	40%	47%
Student Visa (Independent ELICOS)	45%	40%
Working Holiday Visa	6%	6%
Tourist Visa	5%	3%
Working and Holiday	0%	1%
I don't have a visa	1%	1%
Other	3%	3%

# Maximising the ELICOS student experience

## 4.4.3. Application Process and Support

The majority of respondents submitted their application through an agent (68%), which has decreased since 2009 (73%). Direct online applications (10%) and those via a university (12%) both increased in 2011 ELB results. The increase in applications via a university may reflect the respondent profile which had a higher proportion of university based providers than 2009. ELICOS appears to rely more on education agents than other sectors, with 52% of enrolment from agents and a total of 37% direct applications, (24% direct online and 13% direct paper based applications).

	Aus ELB 2011	Aus ELB 2009	Aus ISB 2011
Via an education agent	68%	73%	52%
Via a university	12%	7%	6%
Direct online application	10%	8%	24%
Direct paper application	7%	8%	13%
Other	4%	4%	5%
Base	7852	9371	10721

While only 9% of students indicated that the easy visa application was a determinant in country selection, other evidence suggests that this is an important consideration for students. In addition, the many regulatory changes over the past few years have caused confusion in many parts of the market. As such, an understanding of the visa application process is important.

The many regulatory changes over the past few years have caused confusion in many parts of the market.

Interestingly there was an increase of 4% in first time, quick and easy enrolments applications from 71% to 75% between the 2009 and 2011 ELB, with a similar decrease in the number of lengthy and difficult applications. A large majority of respondents submitted their applications via an educational agent in 2009 and 2011. This could explain the large number of participants stating the application was an easy process. Inevitably, the cohort does also represent those students who were successful in gaining a visa.

	ELB 2009	ELB 2011	Difference
My visa application was accepted the first time (the process was quick and easy)	71%	75%	+4%
My visa application was accepted the first time (the process was lengthy and difficult)	27%	23%	-4%
My visa application was declined the first time (I applied again and then it was accepted)	1%	1%	-
My visa application was declined the first time (I made an appeal and then it was accepted)	0%	0%	-

## 4.5. Satisfaction Ratings

The following section considers the satisfaction of respondents across living, learning and support activities and their propensity to recommend to others. The data captures students' experience and perceptions as compared with the 2009 ELB and the national ISB benchmarks.

Importance ratings have also been developed for key areas. These ratings (or the derived importance) are calculated by correlating each element of interest with the likelihood to recommend. A higher correlation means that the relationship between the element and the likelihood to recommend the experience is strong. Derived importance, therefore, shows which factors have the greatest impact on recommending the language school to others.

The derived importance is represented on a matrix. Elements in the top right quadrant are important to students and perform well. Those in the bottom right quadrant are important, but do not perform as well and may be areas for improvement. Elements in the top and bottom left quadrants are of lower priority and importance to students. These elements should be reviewed and monitored to ensure that providers focus on the most important issues for students.

### 4.5.1. Living

#### Living Satisfaction Scores

As reported in the i-graduate 2011 Report, satisfaction scores for all 18 elements of living are high and generally improving. The scores of only three of the total 18 measures have decreased since 2009 and one has remained the same. There has been an overall improvement since the ELB of 2009, and scores are slightly higher overall than for the ISB.

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Satisfaction scores for all 18 elements of living are high and generally improving.

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The largest improvement was recorded in opportunities to earn while studying (+14%). The most significant drawback of living in Australia - with only about half of students satisfied - is the cost of living and the cost of accommodation. This picture is marginally worse than in 2009 and is replicated more generally in the ISB. It is exacerbated by the central capital city locations of most language schools and the strength of the Australian dollar.

The only three elements which showed a decreased satisfaction since 2009 were the *cost of living* (decreasing by 4%), *transport links* to other places (decreasing by 2%), and the *weather* (decreasing by 6%).

In comparison to the ISB 2011, satisfaction was higher in 16 out of the 18 elements, with the 2011 Language Barometer results 4 percentage points lower for transport links to other places and 1 % lower for quality of accommodation.

While these factors are largely beyond an individual provider's control, they provide focus and evidence for issues that the sector as a whole can direct their advocacy efforts with regard to policy support and process improvement for the sector.

# Maximising the ELICOS student experience

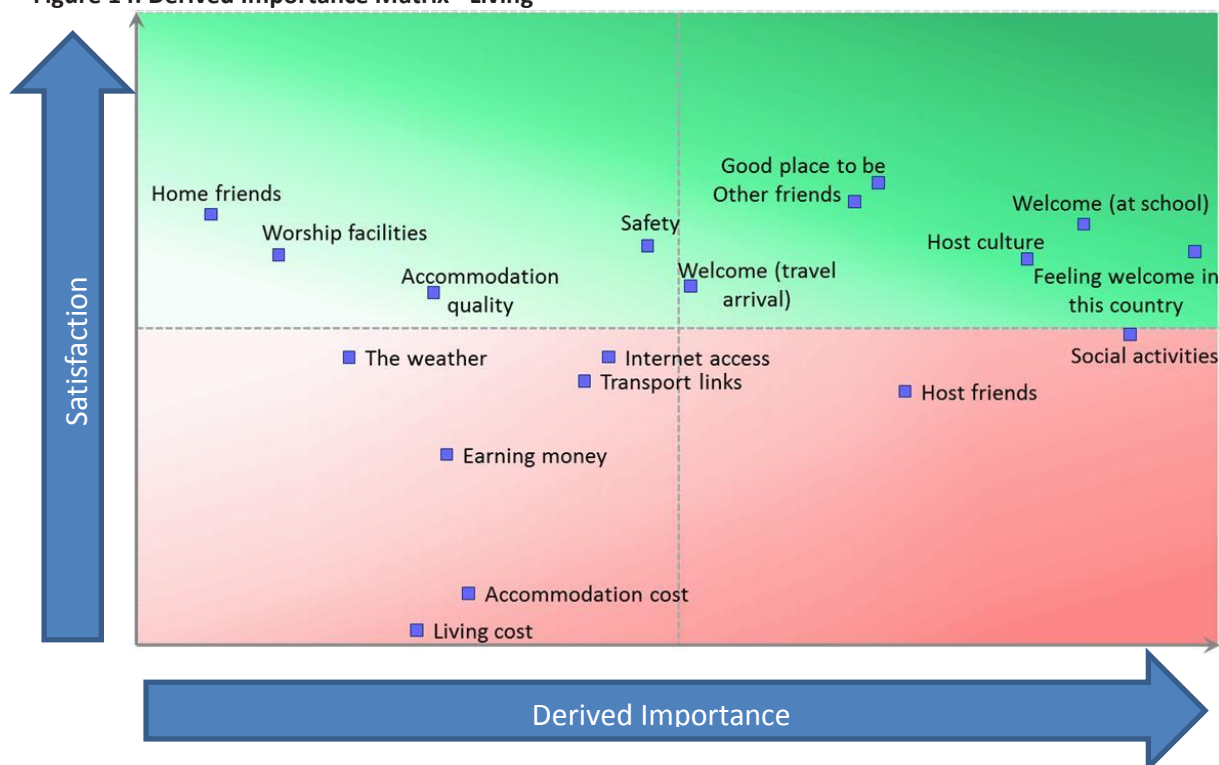
	ELB 2011 vs ELB 2009	Aus ELB 2011	Aus ELB 2009	Aus ISB 2011
<b>OVERALL</b>				
Living overall	↑ 3%	89%	86%	86%
Base	↓ -1367	7649	9016	35412
<b>ACCOMMODATION and LIVING COSTS</b>				
The quality of accommodation	↑ 2%	83%	80%	84%
Opportunities to earn money while studying	↑ 14%	66%	52%	58%
The cost of accommodation	→ 0%	52%	52%	49%
The cost of living (food, drink, transport and social)	↓ -4%	49%	52%	48%
<b>WELCOME</b>				
The welcome I received when I arrived at my language school/centre	↑ 4%	89%	86%	86%
Welcome/pick up at airport/railway/coach station	↑ 1%	83%	82%	77%
<b>SOCIAL</b>				
Making friends from other countries during my stay	↑ 3%	92%	89%	84%
Making friends from my home country during my stay	↑ 2%	90%	88%	89%
Feeling welcome in this country	↑ 3%	87%	84%	NA
Opportunities to experience the culture of this country	↑ 2%	86%	84%	80%
Social activities (events or trips organised by my language school/centre)	↑ 7%	78%	71%	77%
Making friends from this country during my stay	↑ 4%	73%	69%	67%
<b>DAY TO DAY LIFE</b>				
The surroundings outside the language school/centre	↑ 4%	94%	90%	88%
Feeling safe and secure	↑ 7%	87%	80%	86%
Facilities for religious worship	↑ 7%	86%	80%	85%
Availability of internet access	↑ 9%	76%	67%	74%
The weather	↓ -6%	76%	82%	NA
Transport links to other places	↓ -2%	74%	76%	77%

## Living Derived Importance Matrix

Host friends and social activities were identified as areas of high importance but only about 3 in 4 students were satisfied with these aspects. These two elements have both improved since 2009, but there is still scope for further improvement.

Conversely, the host culture, Feeling welcome in this country and welcome at the school were all rated as areas of high importance, and the vast majority of students were satisfied with these aspects of their student experience.

Figure 14: Derived Importance Matrix - Living



# Maximising the ELICOS student experience

## 4.5.2. Learning

### Learning Satisfaction Scores

Satisfaction scores in all 18 learning elements were generally high, and they have all improved since 2009 by an average of 5 percentage points. In addition, all of the 2011 ELB satisfaction scores for elements comparable against the ISB were equal to or higher than the Australian ISB.

The greatest satisfaction (with levels between 89% and 95%) was with all aspects of teaching, feedback, assessment, personal support from teachers and course content. The lowest satisfaction was with flexibility of study, with non-classroom activities to help learn English and opportunities for work experience as part of their course. Nonetheless, opportunities for work experience and non-classroom activities to help learn English increased by 7% and 6% respectively since 2009.

The greatest satisfaction (with levels between 89% and 95%) was with all aspects of teaching, feedback, assessment, personal support from teachers and course content.

	ELB 2011 vs ELB 2009	Aus ELB 2011	Aus ELB 2009	Aus ISB 2011
<b>OVERALL</b>				
Learning overall	↑ 4%	91%	87%	83%
Base	↓ -1453	7743	9196	36405
<b>TEACHERS</b>				
Teachers who I can understand	↑ 2%	95%	93%	90%
Staff/teachers who are friendly and approachable	↑ 3%	95%	92%	NA
The teaching ability of teachers	↑ 3%	94%	91%	85%
Fair and transparent assessment of my work	↑ 4%	92%	88%	85%
Getting time from teachers / personal support with learning when I need it	↑ 4%	89%	85%	84%
<b>STUDIES</b>				
Feedback on work from teachers	↑ 4%	91%	87%	84%
The content of my course/studies	↑ 4%	89%	85%	88%
Learning that will help me get onto a good course	↑ 5%	89%	84%	NA
Studying with people from other cultures	↑ 3%	87%	84%	85%
Extra English language or study skills support classes	↑ 6%	82%	76%	NA
The flexibility to decide how I want to study	↑ 5%	81%	75%	NA
Work experience opportunities as part of my course	↑ 6%	73%	67%	61%
<b>FACILITIES</b>				
The quality of the classrooms	↑ 5%	88%	84%	85%
The technology (Computers, internet access etc)	↑ 6%	86%	81%	84%
The learning resources (books etc)	↑ 5%	86%	81%	86%
Opportunities to practise my English language skills	↑ 6%	86%	80%	NA
The size of the classes	↑ 6%	85%	79%	NA
Non-classroom activities to help me learn English	↑ 7%	76%	69%	NA

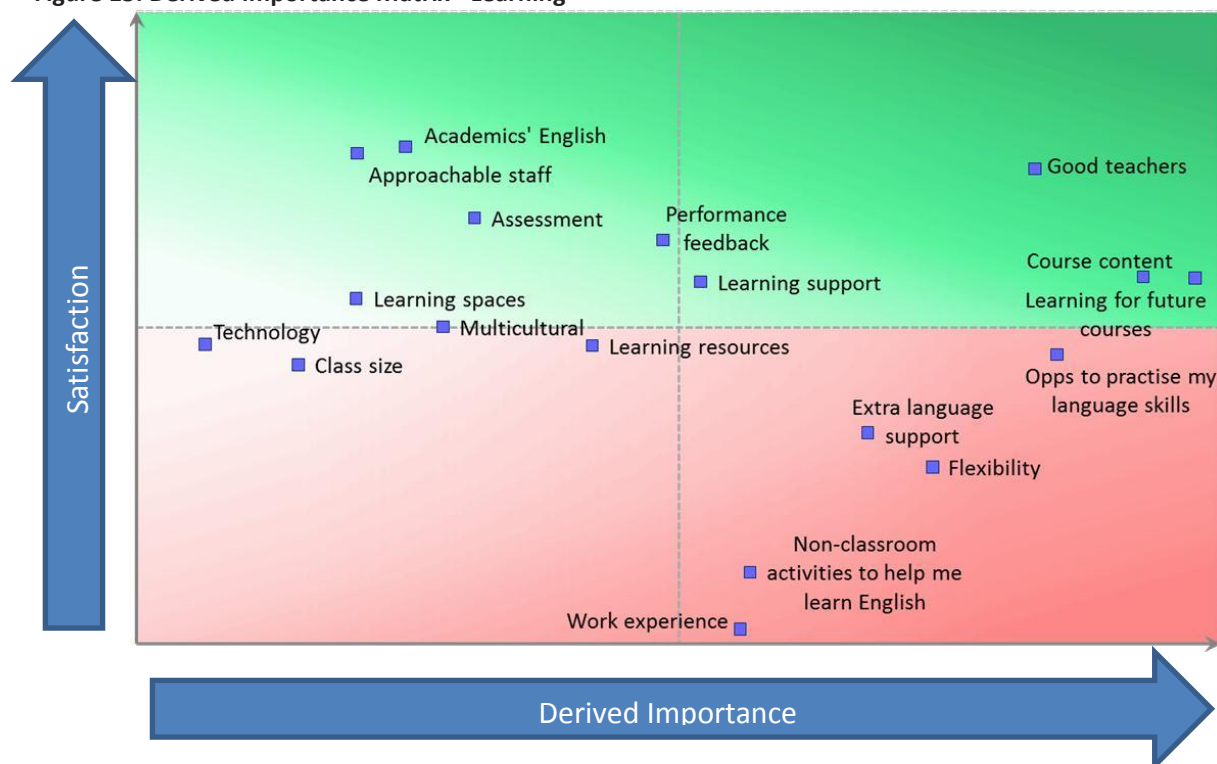
### Learning Derived Importance Matrix

Those elements deemed important and scoring well included course content learning for future courses and effective teachers. Factors deemed important but not performing as well and requiring improvement included opportunities to practice my language skills, non-classroom activities to help me learn English and extra language support. However, many of these improved markedly since 2009. Elements of lower priority and importance to students included use of technology and class size.



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Figure 15: Derived Importance Matrix - Learning



## 4.5.3. Support

### Support Satisfaction Scores

Support services were benchmarked only against the 2009 ELB, as many support services are dissimilar at university level. As with learning and living, the satisfaction levels were high overall, and all elements showed marked improvement since 2009 (+7% overall).

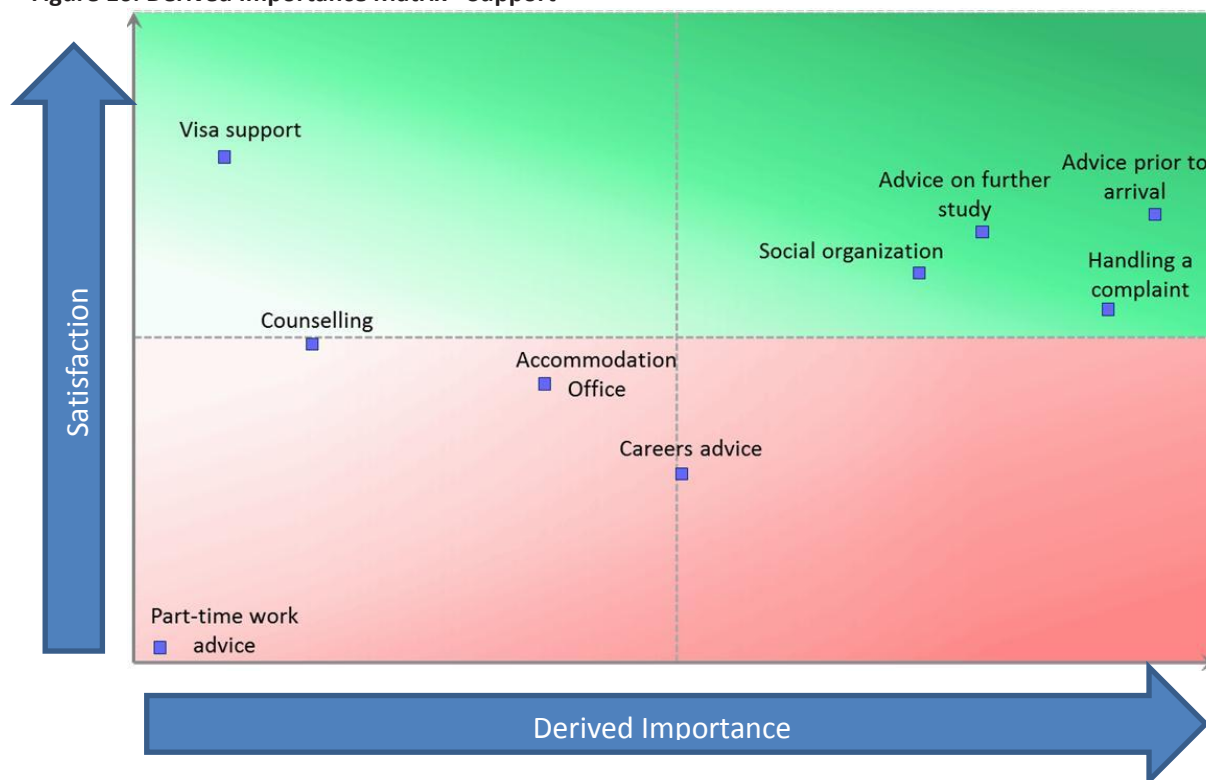
	ELB 2011 vs ELB 2009	Aus ELB 2011	Aus ELB 2009
<b>OVERALL</b>			
Support overall	↑ 7%	83%	76%
Base	↓ -1286	7530	8816
<b>STUDY and EMPLOYMENT</b>			
Advice on further study following my English course	↑ 7%	85%	78%
Advice on employment/career options following my course	↑ 7%	75%	67%
Advice and guidance on finding part-time work while in this country	↑ 9%	68%	59%
<b>LIVING</b>			
Social organization	↑ 10%	83%	73%
Advice on finding medical care or counselling services	↑ 7%	80%	73%
Accommodation placement service	↑ 7%	79%	72%
<b>OTHER</b>			
Help and support with my visa application	↑ 3%	88%	84%
Advice provided by my language school/centre before travelling	↑ 6%	85%	80%
Handling a complaint	↑ 10%	82%	72%

The highest satisfaction was *with help and support with visa applications* (88%) and *advice on further study* (85%). Conversely, satisfaction was lowest with *advice in relation to part-time work* (68%). This may be related to unrealistic expectations of the economic situation and the role of the school; however this could be an area where individual institutions can improve and provide a point of difference for potential students.

## Support Derived Importance Matrix

The Support Matrix showed a positive picture as the majority of elements fell into the upper quadrants for satisfaction. Satisfaction with support relating to jobs (Part-time work advice and Careers advice) improved markedly since 2009. These could be seen as areas for further improvement or areas for expectation management.

Figure 16: Derived Importance Matrix - Support



## 4.6. Recommendation

Respondents were asked if they *would recommend the English language school/centre to other students*. The results were positive, with 78% saying they would encourage others to apply and only 4% who would discourage others. As with other scores, these showed an improvement since 2009 and were marginally better than the ISB scores.

	Aus ELB 2011	2011 vs 2009	Aus ISB 2011
I would actively encourage people to apply	28%	+2%	25%
If asked, I would encourage people to apply	50%	+4%	49%
I would neither encourage nor discourage people to apply	18%	-4%	19%
If asked, I would discourage people from applying	3%	-1%	5%
I would actively discourage people from applying	1%	-1%	2%

Respondents were also asked if they would recommend this country to other students. The results in the table below showed a net increase in encouragement compared to 2009; i.e. more who would positively encourage others and fewer who would discourage others.

	Aus ELB 2011	2011 vs. 2009	Aus ISB 2011)
I would actively encourage people to apply	28%	+2%	25%
If asked, I would encourage people to apply	50%	+4%	49%
I would neither encourage nor discourage people to apply	18%	-4%	19%
If asked, I would discourage people from applying	3%	-1%	5%
I would actively discourage people from applying	1%	-1%	2%

## 4.7. Assessment of minimum and maximum results

The ELB is an aggregate of data reported from participating schools. Analysis of the individual institutions data showed a significant variation in the level of satisfaction on individual items, as demonstrated in the table below. This table shows those items with the greatest variation. In some instances, the variation was over 50%. Items that performed the worst include the cost of living (23%), the cost of accommodation (35%) and technology (37%). Areas with the greatest variation in maximum and minimum satisfaction included technology (60% variation), transport to other places (54% variation), and advice on employment /career options (51% variation).

Assessment of those items that performed worst or had the minimum satisfaction rating with one provider in 2009, compared with the minimum in 2011, show a range of improvements. The most significant improvements have been recorded for:

- Non-classroom activities to help me learn English (30% in 2009, now 55%)
- Handling a complaint (46% in 2009, now 67%)
- The learning resources (books etc.) (57% in 2009, now 73%)
- Availability of internet access (38% in 2009, now 53%)
- Work experience opportunities as part of my course (47% in 2009, now 61%)



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	2009	2011	Change
Non-classroom activities to help me learn English	30%	55%	+25%
Handling a complaint	46%	67%	+21%
The learning resources (books etc.)	57%	73%	+16%
Availability of internet access	38%	53%	+15%
Work experience opportunities as part of my course	47%	61%	+14%
I feel that my English language course offers value for money	49%	63%	+14%
Learning that will help me get onto a good course	60%	74%	+14%
Advice provided by my language school/centre before travelling	61%	75%	+14%
Fair and transparent assessment of my work	73%	87%	+14%
Opportunities to earn money while studying	32%	45%	+13%
Feeling welcome in this country	57%	70%	+13%
Facilities for religious worship	65%	78%	+13%
Extra English language or study skills support classes	59%	71%	+12%
The welcome I received when I arrived at my language school/centre	66%	78%	+12%
Staff/teachers who are friendly and approachable	78%	90%	+12%
The quality of the classrooms	52%	63%	+11%

Assessment of the median results showed the key issues were:

- the cost of living (50%),
- the cost of accommodation (54%),
- advice on finding part-time work (65%) and
- opportunities to earn money while studying (66%).

Across all providers, there were areas with consistently high scores and limited variance such as easy to understand teachers (88 – 99%), friendly and approachable staff (90 – 100%) and fair and transparent assessment of work (87 – 98%).

It should be noted that the minimum figure reflects the satisfaction level of that single individual student studying at a particular institution

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Across all providers,  
there were areas with  
consistently high scores  
and limited variance

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	Aus ELB 2011	Min	Max	Variation
The technology (Computers, internet access etc.)	85%	37%	97%	60%
Transport links to other places	74%	39%	93%	54%
Advice on employment/career options following my course	72%	41%	92%	51%
The cost of living (food, drink, transport and social)	50%	23%	70%	47%
Availability of internet access	77%	53%	97%	44%
The weather	76%	53%	93%	40%

# Maximising the ELICOS student experience

	Aus ELB 2011	Min	Max	Variation
Accommodation placement service	77%	52%	91%	39%
Advice & guidance on finding part-time work while in this country	66%	45%	83%	38%
Opportunities to earn money while studying	66%	45%	81%	36%
Making friends from this country during my stay	72%	52%	88%	36%
The cost of accommodation	53%	35%	69%	34%

Those areas with the most significant variation in maximum and medium satisfaction by individual providers' are reported below. The most significant of these is technology, with the lowest satisfaction score for one provider of just 37%, followed by transport links (39%).

	Aus ELB 2011	Min	Max	Variance
The technology (computers, internet access etc.)	85%	37%	97%	60%
Transport links to other places	74%	39%	93%	54%
Advice on employment/career options following my course	72%	41%	92%	51%
The cost of living (food, drink, transport and social)	50%	23%	70%	48%
Availability of internet access	77%	53%	97%	44%
The weather	76%	53%	93%	41%
The size of the classes	84%	56%	96%	40%
Studying with people from other cultures	87%	57%	97%	40%
Accommodation placement service	77%	52%	91%	39%
Opportunities to practise my English language skills	85%	56%	95%	39%

It should be noted that many of the areas of concern are out of a providers' direct control. But some of the weakest performing areas can be addressed. Areas that have performed poorly that can be more efficiently managed include:

1. Technology (Computers, internet access)
2. Advice on employment /career options
3. Internet Access
4. Class size
5. Studying with people from different cultures
6. Accommodation and placement services
7. Opportunities to practice my English

Part one of this report dealt with key findings from the 2011 ELB into student experience of studying in Australia. Part two provides approaches and practical tools to support providers, address issues and continue to improve the sector's service offerings.

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## PART 2: A PRACTICAL GUIDE TO MARKETING, ADMINISTERING, TEACHING AND SUPPORTING ELICOS STUDENTS

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### 5. Introduction

English Australia commissioned the English Language Barometer (ELB) study in 2011 to assess the sector's progress in meeting ELICOS students' expectations. This research builds on the research outcomes from 2009 and provides an opportunity to benchmark sector progress toward meeting the needs of students. It also provides insights into the students' satisfaction with their experience.

The outcomes from the 2011 ELB were positive with high levels of satisfaction being recorded and improvements being made across many assessment areas. Over 91% of students were satisfied or very satisfied with their overall experience. While the sector should be applauded for the outcomes, there is room for improvement.

This report aims to share the positive outcomes from the survey, identify areas for improvement, and provide best practice approaches to addressing issues, thus allowing for continuous service delivery enhancement across the sector.

#### 5.1. Approach to this Guide

The report is structured in three parts. Part one is a summary of the ELB findings. The responses collected from individual ELICOS providers have been aggregated to provide an overall indicative view of the Australian ELICOS sector.

This section, part two, aims to consider the key themes emerging from the ELB and describes how providers might address these targeted areas to ensure continuous improvement of the students' overall experience. Sets of checklists have been developed to allow providers to undertake an assessment of their current position and identify opportunities for improvement or maintenance in these areas. It is acknowledged that not all concepts proposed will be relevant for every provider, but the ideas and approaches can be contextualised and applied as needed for individual providers.

The guide is aimed at ELICOS owners, managers, co-ordinators and teachers at a provider level to present an opportunity to reflect on the outcomes of the project, to review practice and identify gaps to enhance good practice. It should be noted that the guide also provides ideas and insights at a systemic level and offers best practice ideas at a high level.

The guide is broken into the following sections:

1. Marketing
2. Support
3. Living
4. Learning

This section also adopts a spotlight approach. Those areas that have been completed - have good systems in place - are **green**; areas currently under development are **amber**, and those planned or those needing consideration are **red**.

Part three of the report provides more detail on each of the topics as well as a set of tools and templates that can be adapted to each provider's specific situation and needs.

## 6. Marketing

### 6.1. Use of Agents and Direct Enrolment

#### 6.1.1. Agents

The relationship between ELICOS providers and education agents is critical in student recruitment.

The 2011 ELB indicated that the relationship between a prospective student and their education agent was the main determining factor in the student's decision-making process of where and what to study. Over 50% of respondents cited education agent as the main influencer in making the final choice, significantly above the motivating factor of friends, positioned at 25%. Various countries such as Brazil and China demonstrated a stronger reliance on agents than other countries.

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The relationship between ELICOS providers and education agents is critical in student recruitment.

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In addition to being a key influencer, agents were also the primary support in the application process for the majority of ELICOS students. 68% of applications were managed via an agent. While this indicates a decrease from 73% in 2009, agents remain a significant influencer for the ELICOS sector and well above the ISB benchmark of 52%.

As the majority of students enrolled from their home country (85%), offshore agents play a critical role and need to be well supported. Providers should develop relationship management strategies that balance the cost of travel with the returns from each agent and market. Effective agent management also relies on working collaboratively as a partnership to recruit students. Agents must be provided with current and accurate information to assist them to deliver the best advice.

# Maximising the ELICOS student experience

## Best Practice Checklist

Strategies	Current	Planned	Complete
Develop and maintain data collection mechanisms to identify the number of students being sourced from agents			
Develop and implement a strategic approach to agent management			
Follow an Agent Management Process			
Ensure a targeted approach to agents by country			
Develop an account management approach to all agents			
Provide accurate and timely information to agents to support students to make informed decisions			
Consider how you will review an agent's performance and outcomes regularly			

## 6.1.2. Direct Enrolment

Direct enrolment of students from both online and paper-based sources increased slightly in the 2011 ELB and accounts for 17% of all enrolments across the sector. The ISB benchmark for direct enrolments is 24%, indicating that ELICOS providers are trending down slightly on the university sector in direct enrolment. The lower proportion of direct enrolments relates to the difference in provider type and student profile between these two sectors. Students applying to universities have higher levels of English and clear academic goals with regard to the type of program they want to study. ELICOS students have lower levels of English, and there is little brand differentiation between providers offering non-award ELICOS programs.

Notwithstanding the challenges, there are also many benefits to direct enrolment, including reduced commissions payable and marketing costs, reduced regulation, and partner oversight. In addition, new and emerging technology is providing a new level of support and processes that facilitate direct enrolment.

ELICOS providers need to monitor and carefully consider existing and proposed changes to the student visa program and the ESOS regulatory framework. The pending changes call on providers to manage risk through recruitment of students who meet certain criteria for entry to their programs as well taking on increased responsibility for the activities of their agents.

Given the trend for more direct enrolments, ELICOS providers need to firstly assess their interest in taking direct enrolments as a strategic college objective. Secondly, providers need to assess their ability to administer direct enrolment and ensure they have adequate resources and strategies in place.

## Best Practice Checklist

Strategies	Current	Planned	Completed
Develop and maintain data to assess the current level of direct enrolment			
Consider developing a direct enrolment strategy and policies with a focus on countries and institutions			
Consider partnerships with admissions providers to provide technology solutions			

# Maximising the ELICOS student experience

Strategies	Current	Planned	Completed
Develop an effective website to provide information and consider options for e-commerce functionality			
Train staff to support direct enrolments if required			
Develop a target list of countries to promote direct partnerships – to ensure genuine students			
In high-risk countries, have referral networks and agents to support enrolments			
Have processes in place to assess applications and quality of students			
Promote direct entry students from offshore partners			
Consider how reduced agent fees could be redirected to support online systems and grow direct enrolments			

## Tools and Resources

The following tools and resources are provided in Part three of this report to support ELICOS providers' agent management:

1. Overview of the Agent Management Process (10.1, page 51)
2. Sample Agent Manual Contents (0, page 53)
3. Sample Agents Performance Review Template (10.3, page 54)
4. Selected Online Application and Agent Management Service Providers (10.4, page 55)

## Reference for More Information

Reference / More Info	Source / Publisher
International Education Agent Management A Best Practice Guide <a href="http://training.qld.gov.au/resources/information/pdf/agent-management-best-practice-guide.pdf">http://training.qld.gov.au/resources/information/pdf/agent-management-best-practice-guide.pdf</a>	Queensland Department of Education and Training (DET)
Education Agents Manual <a href="http://www.isana.org.au/files/EducationAgentsManual.pdf">http://www.isana.org.au/files/EducationAgentsManual.pdf</a>	International Student Association New Zealand and Australia (ISANA)
Best Practice in Education Agent Management <a href="http://www.aei.gov.au/Regulatory-Information/Pages/Regulatoryinformation.aspx">http://www.aei.gov.au/Regulatory-Information/Pages/Regulatoryinformation.aspx</a>	Victorian TAFE International (VTI)
Using Education Agents, A guide for providers of education and training to overseas students <a href="http://www.pieronline.org/Upload/Files/Using_Education_Agents_pdf.pdf">http://www.pieronline.org/Upload/Files/Using_Education_Agents_pdf.pdf</a>	Department of Education, Employment and Workplace Relations (DEEWR)
National Code Explanatory Guides <a href="http://www.aei.gov.au/Regulatory-Information/Pages/Regulatoryinformation.aspx">http://www.aei.gov.au/Regulatory-Information/Pages/Regulatoryinformation.aspx</a>	Australian Education International (AEI)

# Maximising the ELICOS student experience

## 6.2. Referral Networks

The ELB 2011 indicated a range of referral groups in the student decision process. When asked about the decision to choose a particular school, students indicated parents, friends, teacher or employer (40%) were the primary influencers in the decision. In addition, when asked which of the various networks assisted in the decision-making process the results were as follows:

- |                                     |                         |
|-------------------------------------|-------------------------|
| 1. Education Agent/Consultant (52%) | 5. Tutor/Teacher (7%)   |
| 2. Friends (25%)                    | 6. Careers advisor (6%) |
| 3. Past student/Alumni (21%)        | 7. Employer (1%)        |
| 4. Parents (15%)                    |                         |

The role and value of friends and past students cannot be understated. Ensuring that the relationship with these groups is fostered can assist providers to secure their referral, which may include developing and managing alumni and keeping current students informed.

Parents continue to be a major influencer and funder of student study. As such, targeted messages – such as the support and safety provided to students and the value for money offered - should be built into communication channels

As the majority of students enrol from their home country, it is important to consider in-country referral networks communicated cost-effectively. A stakeholder analysis can assist providers to identify each stakeholder and the impact that potential support can provide to marketing strategies.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Conduct a stakeholder analysis to understand the influence, impact and opportunities for each referral group			
Assess enrolment data by country to determine specific markets and relevant referral groups			
Develop messages that meet the needs of each market influencer			
Review your partner networks to identify additional referral sources. These may include: <ul style="list-style-type: none"> <li>• Pathway providers</li> <li>• Employer groups</li> <li>• Tourism providers</li> <li>• Offshore networks – State government, AEI, Austrade, etc.</li> <li>• Leverage offshore offices, campuses if appropriate</li> </ul>			
Keep current students informed about products and services <ul style="list-style-type: none"> <li>• Consider low-cost approaches to technology solutions: LinkedIn / Facebook</li> </ul>			
<ul style="list-style-type: none"> <li>• Develop a mutual two-way approach to Alumni - What can you do for your alumni and what can they do for you</li> <li>• Consider fee for service opportunities for your Alumni to help offset the cost of administration e.g. additional training, executive</li> </ul>			

# Maximising the ELICOS student experience

Strategies	Current	Planned	Completed
programs, etc.			
Develop approaches for student in-country involvement			
<ul style="list-style-type: none"> <li>Use alumni to man exhibition booths</li> <li>Consider appointing Alumni as institutional ambassadors</li> <li>Consider developing a student blog – Online advisory service, mentoring, buddy system, etc</li> </ul>			

## Tools and Resources

The following tools and resources are provided in part three of this report.

- Stakeholder Engagement Matrix Template (10.5, page 55)
- Sample Market Segmentation Criteria (10.6, page 55)

## Reference for More Information

Reference / More Info	Source / Publisher
Various Australian Alumni Groups:	
<ul style="list-style-type: none"> <li>ThaiCham - <a href="http://www.australionalumni.com">www.australionalumni.com</a></li> <li>Indonesia - <a href="http://www.ozmate.org">www.ozmate.org</a></li> <li>Malaysia - <a href="http://www.emaac.org">www.emaac.org</a></li> </ul>	
ASEAN Australian alumni survey report 2010: covering 5 markets: Indonesia, Malaysia, Singapore, Thailand, Vietnam. Canberra: Australian Trade Commission. 2011.	Austrade – Market Information Package Access Required

## 6.3. Segmentation, Key Message Development and Promotions

In order to provide an attractive value proposition to potential students, a provider needs to have significant awareness of associated factors, including their aspirations, expectations, cultural sensitivities, influencers in the decision and their decision processes.

For instance, students from Taiwan are more likely to consider a number of different host study countries, students from Russia are more likely to select Australia as it is an English speaking country, and students from China are the most likely to use an agent when applying. In order to do this, a market segmentation strategy should be used. Providers are encouraged to participate in future ELB research as the information from the research can support individual providers' understanding of the various market segments including nationality, course selection, country selection, influencers in the decision process and plans after study.

Students from China are the most likely to use an agent when applying.

Once segmented providers can target communication resources to key markets, thereby ensuring each message best fits the needs of that group, a provider's services are positioned in the most appropriate way to differentiate from competitors.



# Maximising the ELICOS student experience



Providers should also consider other messages that compliment or contribute to the overall message. For instance, Austrade has devised a new brand to re-position Australia's education sector internationally. The new brand, Future Unlimited, shifts the focus away from marketing Australia primarily in terms of affordability and lifestyle to highlighting the quality, educational outcomes and life-long benefits to graduates instead. Relevant providers should look to leverage related communication to their target audience. English Australia has also launched a new brand tagline - "quality, support, assurance" - that gives colleges an umbrella brand under which to align their own key messages.

## Best Practice Checklist

Strategies	Current	Planned	Completed
Develop a segmentation strategy and implement			
Understand aspiration and expectation for each segment and develop relevant, targeted key messages			
Consider competing and supporting communication to your target audience and assess how you can leverage this to your advantage. This may include: competitors, Austrade /AEI, English Australia, Tourism Australia, State government offices, etc.			
Develop targeted messages by country – consider the need for translation			
Ensure cultural sensitivity in all communication material			
Use positive promotions and celebrate and communicate your successes. This may include: <ul style="list-style-type: none"> <li>• Hosting student awards</li> <li>• Fostering publicity on student outcomes</li> <li>• Develop a newsletter for existing and past students</li> </ul>			

## Tools and Resources

The following tools and resources are provided in Part three of this report.

- Sample Market Segmentation Criteria (10.6, page 55)
- Future Unlimited promotional material samples (10.7, page 55)

## Reference for More Information

Reference / More Info	Source / Publisher
Future Unlimited - Brand Guidelines <a href="http://www.austrade.gov.au/Export/Export-Markets/Industries/Education/Future-Unlimited/default.aspx">http://www.austrade.gov.au/Export/Export-Markets/Industries/Education/Future-Unlimited/default.aspx</a>	Austrade
English Australia – Brand Guidelines (member colleges only)	English Australia
Best Practices on Managing the Delivery of Canadian Education Marketing <a href="http://www.international.gc.ca/education/assets/pdfs/Guhr%20edu%20canada%20report%20(final%20locked)%20-%20Dec%202023,%202009-%20EN.pdf">http://www.international.gc.ca/education/assets/pdfs/Guhr%20edu%20canada%20report%20(final%20locked)%20-%20Dec%202023,%202009-%20EN.pdf</a>	Foreign Affairs and International Trade Canada

## 6.4. Website Management and Social Media

The 2011 ELB identified that over 20% of students used websites as a tool in assisting them to decide where to study. In addition, over 17% of providers indicated direct enrolment, highlighting the need of good online systems. The 2011 British Council's research survey of 127,000 students from 200 countries considering overseas study found that universities' websites are the single most important source of information for students establishing a consideration set. This trend is set to continue; as internet access expands, so do expectations that information will be available in the local language. While 70% of web pages are in English, only 27% of internet users are English speakers, followed by Mandarin at 23%.

Although not specifically presented in the ELB 2011, evidence suggests that social media has a significant impact on the way we communicate. The majority of students are younger and more attuned to the online world, and the number and complexity in social marketing usage and channels grow daily. Providers cannot afford to passively engage in the online channels.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Develop an online strategy			
Commit to the online space and resource it adequately - consider a University Intern to support this.			
Consider non-English speaking background needs on site			
Use Translation as appropriate			
Consider the technology and key social media penetration in targeted countries			
Ensure relevant information is provided to help decision making			
Consider e-commerce functionality for direct enrolment if appropriate			

### Tools and Resources

The following tools and resources are provided in part three of this report.

- Overview of Social Media (10.8, page 56)
- World Map of Social Networks
- The Social Media Network (10.9, page 57)

### Reference for More Information

Reference / More Info	Source / Publisher
Social Media Sells Education <a href="http://www.theaustralian.com.au/higher-education/social-media-sells-education/story-e6frgcjx-1226113733750">http://www.theaustralian.com.au/higher-education/social-media-sells-education/story-e6frgcjx-1226113733750</a>	The Australian Newspaper
6 Best Practices for Universities Embracing Social Media <a href="http://mashable.com/2011/10/10/universities-social-media/">http://mashable.com/2011/10/10/universities-social-media/</a>	Online Resource

# Maximising the ELICOS student experience

## 6.5. Pathways and Packaging

Outcomes from the ELB 2011 highlighted various reasons that students choose to study. The majority of ELB respondents stated preparation for further study. However, many undertake study to improve future employment opportunities, improve English for current employment, personal interest and development.

Given the significant number of students with intentions to progress to further study, providers should consider how they can best facilitate pathways for students. Developing, maintaining and promoting packages may also assist providers to access streamlined visa processing. It may offer a competitive edge if appropriate partnerships are developed by reducing application requirements for students.

### Best Practice Checklist

Strategies	Current	Planned	Completed
<b>Packaging</b>			
Consider your course mix and actively manage your courses to meet the trends/demands in-market.			
Consider packaging arrangements to support streamlined visa processing			
Audit current packaging partners to ensure up to date			
Map current formal pathways			
Promote the success of packages			
Assess if you meet the DIAC visa risk factors to support pathways development and maintenance			
Consider opportunities to share marketing costs with pathway partners			
<b>Pathways</b>			
Review various pathway (outcome) options. Including, holiday maker, employment and further study			
Ensure pathways are developed and promoted			
Develop links with Industry to provide pathway to employment			

### Reference

Reference / More Info	Source / Publisher
DIAC – Streamlined Visa Processing <a href="http://www.immi.gov.au/business-services/education-providers/streamlined-visa-arrangements.htm">http://www.immi.gov.au/business-services/education-providers/streamlined-visa-arrangements.htm</a>	Department of Immigration and Citizenship (DIAC)
TESQA Regulatory Risk Framework – February 2012 <a href="http://www.teqsa.gov.au/sites/default/files/TEQSA%20Regulatory%20Risk%20Framework%20Feb%202012.pdf">http://www.teqsa.gov.au/sites/default/files/TEQSA%20Regulatory%20Risk%20Framework%20Feb%202012.pdf</a>	Tertiary Education Quality and Standards Agency (TEQSA)
Study Pathways of International Students in Australia – May 2012 <a href="https://aei.gov.au/research/Research-Papers/Documents/Study%20Pathways%202012_1.pdf">https://aei.gov.au/research/Research-Papers/Documents/Study%20Pathways%202012_1.pdf</a>	Australian Education International (AEI)

## 7. Support

### 7.1. Student Support Services

Ensuring students are well supported, have the best opportunities to be part of a community, and integrate into Australian society can greatly enhance the overall study experience and satisfaction. The sector appears to be tracking well with the 2011 ELB, indicating a high level of satisfaction at 83% of the overall support services offered by ELICOS providers; an increased from the 2009 figure of 76%. Although this result was positive, 17% of students were not satisfied and there is room for improvement in support services.

Areas of perceived weakness in support included:

- Advice on employment/career options after my course
- Advice and guidance finding part time work whilst in Australia
- Accommodation placement services

Given the majority of ELICOS students are with a provider for a short period (less than 12 weeks), it may not be cost effective to provide these services to students. Therefore, a range of alternative strategies should be considered. A vast range of activities can be used to support a student's engagement and thus improve the overall satisfaction. Best practice options on these areas can be found in the following sections of this report.

#### Best Practice Checklist

Strategies	Current	Planned	Completed
Review national code requirements to ensure you are providing the best practice in support services			
Ensure a culture of student support emanates from the top and permeates from the bottom up			
Foster support through networks and community groups			
Provide regular and considered communication and information to support students			
Use multi-lingual notices as needed			
Develop and communicate a regular social program			
Provide access to support cultural and religious needs			
Keep records of the use of student support services to ensure you can best direct resources –outsource services as needed			
Ensure Agents are briefed with the necessary information on your offering to assist to manage expectations			
Consider how the English Australia/Council of International Students Australia (CISA) Memorandum of Understanding might assist you to support students			
Understand student profile - visa profile, markets, etc.			

# Maximising the ELICOS student experience

## 7.1.1. Pre-departure Services

Having an effective pre-departure strategy can assist providers to manage the expectations of students and ensure they are adequately informed before they arrive.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Manage expectations by providing access to information on cultural and lifestyle issues			
Use in-country alumni to share information with new students			
Leverage existing partners (pathways partners) to share pre-departure activities and resources			
Consider and meet the national code pre-departure requirements			
Mandatory pre-departure to ensure your students understand			
Adapt written agreements with students to include details on study periods and prepayments in line with the new ESOS TPS requirements.			

### Tools and Resources

The following tools and resources are provided in part three of this report.

- Pre-departure Handbook Sample Contents (10.10, page 57)

### Reference

Reference / More Info	Source / Publisher
Orientation & Pre-Arrival Handbook - The Rainbow Guide <a href="http://www.isana.org.au/index.php?option=com_content&amp;task=view&amp;id=246">http://www.isana.org.au/index.php?option=com_content&amp;task=view&amp;id=246</a>	ISANA
Guide to Best Practice in Providing Student Support Service in ELICOS	English Australia - Members Only
Good Practice Principles for English language proficiency for international student in Australian Universities (2008) <a href="https://aei.gov.au/research/Research-Papers/Documents/Study%20Pathways%202012_1.pdf">https://aei.gov.au/research/Research-Papers/Documents/Study%20Pathways%202012_1.pdf</a>	DEEWR
Principles of good practice for enhancing international student experience outside the classroom <a href="http://www.isana.org.au/index.php?view=article&amp;catid=46%3Asite-general&amp;id=354%3AGood-Practice-Guide&amp;format=pdf&amp;option=com_content&amp;Itemid=120">http://www.isana.org.au/index.php?view=article&amp;catid=46%3Asite-general&amp;id=354%3AGood-Practice-Guide&amp;format=pdf&amp;option=com_content&amp;Itemid=120</a>	ISANA

## 8. Living

Living satisfaction scores in the ELB 2011 showed a high level of satisfaction (89%) and improvement on 2009 (86%). Analysis of the minimums and maximums for individual providers showed the lowest score of just 78%.

Those areas with lower satisfaction scores included cost of living (49%), cost of accommodation (52%) and opportunities to earn money whilst studying (66%). While in many instances these issues are out of the direct control of providers, there are strategies and approaches that providers can adopt to offset the impact for students.

### 8.1. Managing the Cost of Living

The cost of living was identified as a significant issue in the 2011 ELB.

Only 49% of students were satisfied, a reduction of 4% from 2009. Although unable to do anything about the cost of living in Australia, providers can focus on providing accurate and up-to-date information, managing student expectations around the cost of living in Australia and also providing more cost effective options. Moreover, the dissatisfaction with the cost of living could be offset by opportunities to earn money whilst studying.

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The cost of living was identified as a significant issue in the 2011 ELB.

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#### Best Practice Checklist

Strategies	Current	Planned	Completed
Provide information in pre-departure material on cost to manage expectations			
Provide access to information on shops and price ranges across various categories			
Provide kitchen services onsite for students to prepare meals during the day			
Provide information on free activities and social events, etc.			
Provide access to work opportunities to offset costs			
Provide accommodation options for various price points			
Provide links to budget and banking services to support financial management			

# Maximising the ELICOS student experience

## 8.2. Accommodation

Finding affordable housing in most major cities in Australia is difficult even for Australians. The 2011 ELB indicated that 83% of students were happy with the quality of their accommodation, but only 52% were satisfied with the cost. Providing a range of accommodation options to students before departure and during study can support student overall experience. Smaller ELICOS providers may not have the support and infrastructure to provide advanced accommodation services and as such they may need to look at alternative approaches to support students. Simply providing access to quality information on accommodation or outsourcing services to external providers may be adequate.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Seek partnerships with accommodation providers			
Provide various accommodation options and cost			
Identify relevant Homestay providers			
Allocate a dedicated point of contact for support			
Assess options that are recommended to ensure a minimum standard			
Enter into arrangements with local real estate agents to ensure quality options and provide local advice and support to students			
Provide information on rental, homestay, processes			
Provide links to translated tenancy requirements for all states			
Encourage local community to host students as homestay			
Provide information on your website on accommodation options			
Encourage students to utilise friends/relatives to support their search			
Provide information on free accommodation services such as realestate.com.au and domain.com.au and gumtree.com.au			

### Reference

Reference / More Info	Source / Publisher
Promoting participation and engagement in city life <a href="http://www.isana.org.au/index.php?option=com_content&amp;view=article&amp;id=284:promoting-participation-and-engagement-in-city-life-&amp;catid=35:student-support&amp;Itemid=57">http://www.isana.org.au/index.php?option=com_content&amp;view=article&amp;id=284:promoting-participation-and-engagement-in-city-life-&amp;catid=35:student-support&amp;Itemid=57</a>	ISANA
Working Together to Build Complete Homestay Solutions <a href="http://www.isana.org.au/index.php?option=com_content&amp;view=article&amp;id=295:working-together-to-build-complete-homestay-solutions&amp;catid=35:student-support&amp;Itemid=57">http://www.isana.org.au/index.php?option=com_content&amp;view=article&amp;id=295:working-together-to-build-complete-homestay-solutions&amp;catid=35:student-support&amp;Itemid=57</a>	ISANA
Cultural values and cultural issues in mixed culture international student accommodation arrangements. <a href="http://www.proceedings.com.au/isana/docs/2010/paper_fallon.pdf">http://www.proceedings.com.au/isana/docs/2010/paper_fallon.pdf</a>	ISANA



## 8.3. Employment Services

Access to information and support in finding employment rated relatively poorly in the 2011 ELB, including advice on employment following the course (75%), advice and guidance on finding part-time work while on the course (68%), and opportunities to earn money while studying (66%).

Many students seek employment to gain work and English language experience, as well as to subsidise their lifestyle. Employment can also assist students to assimilate into the community and provide an improved cultural understanding. Options for work may include paid and volunteer work (that may lead to employment) and course placement work.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Develop links with employer groups and industry			
Explore and develop job placement services internally or through external providers such as E2E			
Identify options for online getting ready for work support resources			
Encourage students to participate in volunteering programs			
Promote local Careers Expos			
Provide access to Jobs Boards – both on campus and online			
Provide job application assistance			
Provide access to a qualified and skilled careers advisor – possibly through a partner			
Orient students to partner providers with career services			

## 8.4. Lifestyle and Community Engagement

Fitting in and being part of a community rated very highly in the ELB's derived importance rating. Most important are social activities, feeling welcome in the country and feeling welcome at school. These areas performed satisfactorily in the ELB but there is room for improvement. Whilst 73% of students were satisfied with their ability to make friends from this country, 27% were not. Ensuring students are engaged reduces the potential for isolation and dissatisfaction. Social events and activities both in and outside of the classroom are very important elements of the overall experience. For students that do not wish to actively participate, consideration should be given to using social media or virtual communities.

# Maximising the ELICOS student experience

## Best Practice Checklist

Strategies	Current	Planned	Completed
Assess current engagement strategies			
Consider the International Student Leaders Program – such as Brisbane City Council			
Work with state and federal governments to access support services			
Work with other community groups – APEX, Church, Rotary			
Foster support from your local community to assist students to fit in			
Promote volunteering and provide access to volunteering sites such as volunteeringaustralia.org			
Promote availability of local sporting and social groups			
Work with fellow colleges /partners to pool resources and coordinate social activities			
Identify and promote the local council's 'What's On Calendar'			
Develop or link into a student blog for social activities			
Access services and information of support organisations such as; <ul style="list-style-type: none"> <li>• multicultural affairs units</li> <li>• partner colleges or providers</li> <li>• clubs - sporting clubs</li> </ul>			

## Tools and Resources

The following tools and resources are provided in part three of this report.

- Sample social activities to support student engagement (10.11, page 58)
- List of community groups and Clubs to support social inclusion (10.12, page 58)

## Reference

Reference / More Info	Source / Publisher
List of Australian Sports Associations and Clubs <a href="http://az.ezilon.com/australia/sports/sports_association_and_organization/index.shtml">http://az.ezilon.com/australia/sports/sports_association_and_organization/index.shtml</a>	Online resource
Beyond the campus: student engagement and community responses. In 'Making a difference'	International Education Association of Australia (IEAA)
Examples of good practice in assisting international students to integrate with Australian students and the wider community <a href="https://aei.gov.au/Research/Publications/Documents/Good_Practice.pdf">https://aei.gov.au/Research/Publications/Documents/Good_Practice.pdf</a>	AEI

## 9. Learning

Satisfaction scores in all 18 learning elements were extremely high and all have improved since 2009 by an average of 5%. In addition, all of the 2011 ELB satisfaction scores were higher than the ISB.

Effective teachers, good course content and learning for future courses all had the highest derived importance. The lowest satisfaction (and not particularly low) was with Opportunities for work experience as part of my course (73%) and Non-classroom activities to help learn English (76%). Whilst these increased by 6% and 7% respectively from 2009, there is still scope for improvement.

### Best Practice Checklist

Strategies	Current	Planned	Completed
Undertake/update cultural awareness training for all staff			
Integrate local community events and activities with educational programs to encourage assimilation and learning			
Work with the community to seek buddies for students			
<b>Technology and Infrastructure</b>			
Promote access to free wi-fi services in the area			
Promote local libraries locals and services			
Develop partnerships with other local businesses to access services			
Provide open spaces for drop in access to technology if appropriate			
Involve social activities in the courses content as a learning experience			

### Reference

Reference / More Info	Source / Publisher
Implementing good practice principles for English language proficiency: a case study. <a href="http://www.englishaustralia.com.au/index.cgi?E=hcatfuncs&amp;PT=sl&amp;X=getdoc&amp;Lev1=pub_EAJ_26-2&amp;Lev2=Dawson">http://www.englishaustralia.com.au/index.cgi?E=hcatfuncs&amp;PT=sl&amp;X=getdoc&amp;Lev1=pub_EAJ_26-2&amp;Lev2=Dawson</a>	EA Journal
Good Practice Principles for English Language Proficiency for International Students in Australian Universities. <a href="http://www.deewr.gov.au/HigherEducation/Publications/Pages/GoodPracticePrinciples.asp">www.deewr.gov.au/HigherEducation/Publications/Pages/GoodPracticePrinciples.asp</a> .	Australian Universities Quality Agency
Guide to Best Practice in Monitoring Student Progress in ELICOS	English Australia – Members Only

## PART 3: PROVIDER TOOLS AND RESOURCES

Part two of this report aimed to highlight the key themes that emerged from the ELB and describe ways providers might address these. This section, part three, provides a set of practical tools and resources that providers can use to address areas of concern. For more information please refer to the reference tables on the relevant topic in Section Two of this report.

### 10. List of Resources

1. Steps in the Agent Management Process
2. Example of Agents Manual Contents
3. Sample of Performance Review of Agent Template
4. Selected Online Application and Agent Management Service Providers
5. Engagement Stakeholder Matrix Template
6. Sample Market Segmentation Criteria
7. Future Unlimited Branding Material
8. Social Media Overview
9. Complex Social Media Network
10. Pre-departure Guide for ELICOS
11. Fostering Social Inclusion - common events
12. Community Groups and Clubs to support Social Inclusion

#### 10.1. Steps in the Agent Management Process

The diagram below provides an overview of the agent management process. Providers should consider these steps and how each of the activities is managed.

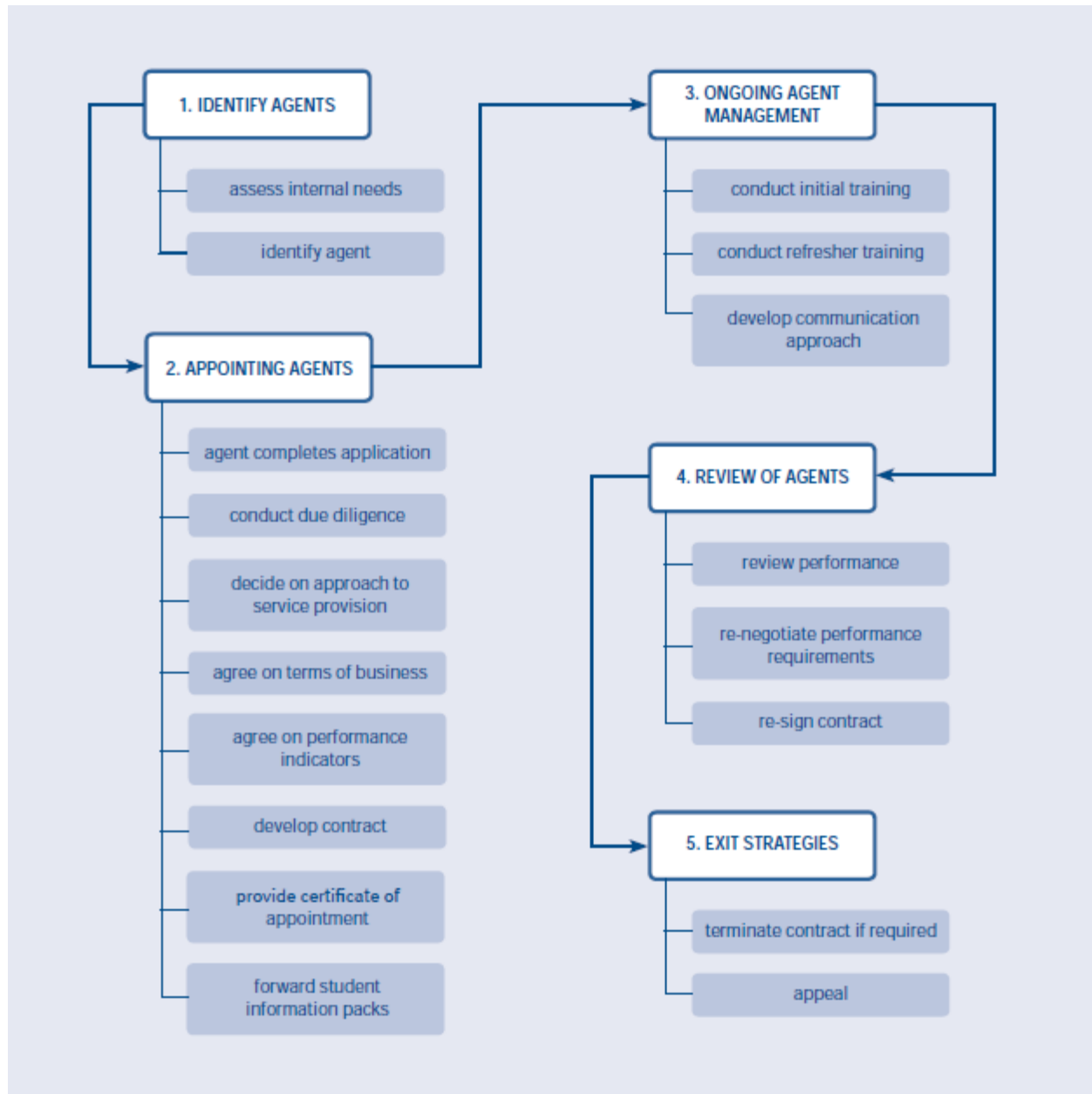
This is particularly important in the context of provider responsibilities under the ESOS Act in relation to agents<sup>7</sup>. Providers may also wish to reference the recently released Statement of Principles for the Ethical Recruitment of International Students<sup>8</sup>.



<sup>7</sup> National Code Part D, Standard 4

<sup>8</sup> <https://www.aei.gov.au/News/Latest-News/Pages/Article-CODEOFETHICSFOREducationAGENTS.aspx>

# Maximising the ELICOS student experience



Source: Agent Management Best Practice Guide, Department of Education and Training, Queensland Government 2011.

## 10.2. Example of Agents Manual Contents

- 1) Welcome
- 2) General information for students and agents
  - a) Studying and living in <where your RTO location>
  - b) About your organisation
  - c) Discipline areas
  - d) Course information
  - e) How to apply
  - f) Credit transfer (RPL)
  - g) Fees
  - h) International scholarships
  - i) Pre-departure and arrival
  - j) Orientation
  - k) Late arrival
- 3) Application Submission
  - a) Application procedures
  - b) Contact details
  - c) How to track application
- 4) General Financial Procedures
  - a) How to invoice
  - b) When to invoice
  - c) What to invoice
  - d) Refunds
  - e) Contact details
- 5) Marketing
  - a) How to order promotional materials
  - b) Contact details
  - c) Events and exhibitions attending over the next twelve months
- 6) Communication
  - a) Upcoming agent events
  - b) E-News letter
  - c) Training and communication opportunities
  - d) Feedback form

Source: Agent Management Best Practice Guide, Department of Education and Training, Queensland Government 2011

## 10.3. Sample of Performance Review of Agent Template

### Performance Review Assessment

Agent I.D	
Agent Name	Territory/ies
Agent Address	Agent Sub branches
Contract Expiry	Contract signed/expired

Rank performance on the following scale.

1 = Exceeded expectations, 2: Met expectations, 3: Failed to meet expectations.

Performance Criteria (KPIs)	1	2	3
Target Students			
Actual Students			
% change from last review period			
Compliance			
Compliance with ESOS Act			
Compliance with DIAC requirements			
Compliance with Code of Conduct			
Customer Service			
Application processing			
Response to enquiries			
Student satisfaction			
Admissions staff satisfaction			
Marketing and Promotions			
Request for additional marketing material			
Use of marketing material			
Outcome of promotional activities			
Effective use of marketing budget			
Incentives			
Did agent qualify for any incentives?			
Training and Qualifications			
Has agent completed any further training or qualifications?			
Details of training and qualifications			
Feedback from Agent			
Any comments or feedback from agent concerning partnership?			

Source: Agent Management Best Practice Guide, Department of Education and Training, Queensland Government 2011



## 10.4. Sample Online Application and Agent Management Service Providers

Service Provider	URL
Hobson's	<a href="http://www.hobsons.com/asiapacific/">http://www.hobsons.com/asiapacific/</a>
ICEF Online	<a href="http://www.icefonline.com/">http://www.icefonline.com/</a>
Study Link	<a href="http://studylink.com/index2.html">http://studylink.com/index2.html</a>

## 10.5. Engagement Stakeholder Matrix Template

Stakeholder	Role / Interest / Activity	Engagement Channel/s	Key Messages

## 10.6. Sample Market Segmentation Criteria

Geographic	Demographic	Behavioural	Psychographic
Customer location: Region / country	Age, gender, socioeconomic, education, etc.	Benefits sought, readiness to enrol, skill set needed, expectation on completion	Personality, Lifestyle, Attitudes, Class, etc.

## 10.7. Future Unlimited Branding Material

Education providers can apply to Austrade to use the new Future Unlimited branding material:

<http://www.austrade.gov.au/Export/Export-Markets/Industries/Education/Future-Unlimited/Using-the-brand>



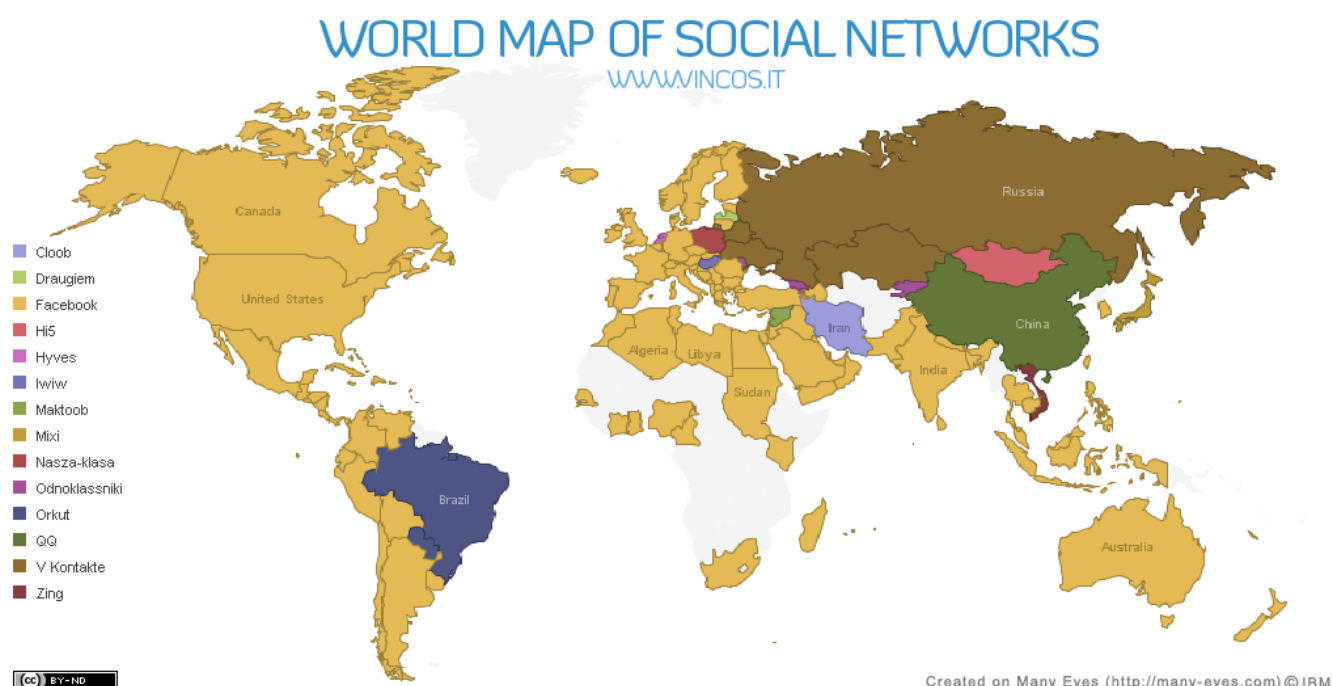
## 10.8. Social Media Overview

Social networking is simply groups of individuals coming together over a shared interest. Social networks allow people to meet together in a familiar environment, share information, participate in events and activities, create sub-networks and interact with public networks.

Social networking has become more prevalent in recent years as a result of new internet-based programs, giving people the ability to source firsthand information on experiences, topics, places, etc. from across the world. There are hundreds of web-based social networking sites, with some of the best known in Australia being Facebook, Twitter and MySpace.

*Tips to Incorporate Social Networking into your Marketing Strategies:*

1. **Consider creating your own social media space** on leading social networking sites. It is easy and inexpensive. Encourage past students to post feedback on the site about their experiences and invite other potential participants to join your network to find out more.
2. **Monitor, monitor and monitor.** As social networking is open to everyone, information may be posted that may not be appropriate, suitable or correct about your programs. It is advisable to have someone regularly check the internet for posts about your programs. This can assist to not only counter negative or incorrect messages, but also be used as a source of positive messages for potential students, parents and sponsors.
3. Consider how you can **use positive and negative feedback** posted on sites to improve or update your programs.
4. Use **competitor sites as market intelligence** to gather ideas such as how programs are run, new market opportunities, or to find potential new partners.
5. It is important to remember that other countries may use other networking sites, and you will need to research how social networking is adopted in your target markets.



Source: Adapted from the Outbound Mobility Best Practice Guide

**The Conversation**  
The Art of Listening, Learning, and Sharing  
Brought to you by  
Brian Solis and JESS3

**Social Bookmarks**  
diigo, magnolia, comment, seoz, who, mixx, reddit, digg, newsvine, hubdub, DISQUS

**Comment & Reputation**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Crowdsourced Content**  
movable type, socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Blog Platforms**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Blogs/Conversations**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Blog Communities**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Micromedia**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Lifestreams**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Specific to Twitter**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**SMS/Voice**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Social Networks**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Niche Networks**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Customers Service Networks**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Location**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Video**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Video Aggregation**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Documents**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Events**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Music**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Wiki**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**LiveCasting - Video and Audio**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

**Pictures**  
socialmedia, Google, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W, socialmedia, Shyft, Bloglines, MyBlogLog, Blogger, Buzz, Ask, e, W

- Welcome Letter
- Introduction To (Host Institution/Location)
- Study Tour Participants
- Group Leader And Support Staff
- Preparing For Departure
- What To Pack
- Safety And Security
- Health
- Insurance
- Important Document Folder
- On Program
- Flights
- Accommodation

# Maximising the ELICOS student experience



- Dress
- Transportation
- Money
- Punctuality
- Local Laws And Customs
- Daily Program
- Academic Requirements
- Returning To Australia
- Study Tour Debrief
- Student Evaluations
- Key Words And Translation
- Important Numbers & Websites
- In The Event Of An Emergency

*Source: Best Practice In Outbound Mobility, Department of Education and Training*

## 10.11. Fostering Social Inclusion - Common events

1. A barbecue at the end of Orientation Day
2. A Welcome Dinner for all students every five weeks
3. Random 'novelty days' such as Loud Shirt Day (with barbecue)
4. Celebrations for high days and holy days e.g. Eid ul-Fitr, Diwali, Chinese New Year, Easter etc.
5. Melbourne Cup Day (with hats and lunch)
6. Harmony Day (with food) on 21 March every year
7. Talent quests e.g. karaoke, 'So You Think You Can...' dance/sing/cook/rap etc.
8. Show Day, reflecting activities commonly found at agricultural shows e.g. cooking and craft competitions, gumboot tossing etc.
9. Trivia-type quizzes
10. Competitions e.g. photography
11. 'Stop smoking' workshops and support groups
12. College sports teams (soccer, basketball etc.), complete with T shirts. Many English Australia member colleges organise a soccer tournament for staff and students in the area. Students often take over the administration of these.

*Source: EA Guide to Best Practice in Providing Student Support in ELICOS*

## 10.12. Community Groups and Club to support Social Inclusion

1. Homework Club (teachers are on hand as students complete their homework in a quiet environment)
2. Conversation Club - where students discuss current events or points of interest with a teacher or a volunteer from the local community
3. Musical instrument e.g. guitar (learn to play or just jam)
4. Cooking (in an institution's School of Hospitality classrooms)
5. Dancing – bush dancing, breakdancing, line dancing, salsa etc.
6. Movies
7. Pronunciation
8. Sports (soccer, touch football, table tennis etc.)

*Source: EA Guide to Best Practice in Providing Student Support in ELICOS*

## 11. Appendices

### 11.1. ELB Australian Participants

#### 2011 ELB Australia Participants

Ability English Melbourne	Navitas English Cairns
Ability English Sydney	Navitas English Darwin
Academy of English	Navitas English Manly
ACU English Language Centre Melbourne	Navitas English Perth
ACU English Language Centre Sydney	Navitas English Sydney
Bond University English Language Institute	Open Access College, University of Southern Queensland
Centre for English Language University of South Australia (CELUSA)	QUT International College
Curtin English Language Centre	RMIT English Worldwide
Deakin University English Language Institute (DUELI)	Swinburne College
Embassy CES Brisbane	TAFE English Language Centre Northern Sydney Institute
Embassy CES Melbourne	TAFE International Education Centre
Embassy CES Sydney Centre	TAFE NSW Sydney Institute English Centre (SITEC)
English Language Company	TAFE SA English Language Centre
English Language Institute Victoria University Melbourne Australia	The Centre for Macquarie English (CME)
ETI	The University of Newcastle Language Centre
Eynesbury College Academy of English	The University of Sydney Centre for English Teaching
Griffith English Language Institute (GELI)	UNE English Language Centre
Hawthorn-Melbourne	University of Adelaide English Language Centre
ILSC Brisbane	University of Canberra English Language Institute (UCELI)
ILSC Sydney	University of Tasmania (UTAS)
Institute of Continuing & TESOL Education, The University of Queensland (ICTE-UQ)	UNSW Institute of Languages
Intensive English Language Institute (IELI)	UTS:INSEARCH

# Maximising the ELICOS student experience



Monash University English Language Centre	UWA Centre for English Language Teaching
Navitas English Bondi	UWSCollege
Navitas English Brisbane	

## 2009 ELB Australia participants

Academy of English	Mackay Language College
ACL Darwin English Centre	Pacific Gateway International College Brisbane
ACL Sydney English Centre	Pacific Gateway International College Sydney
ANU College	Perth Institute of Business and Technology (PIBT)
Australian College of English - Bondi Junction	RMIT English Worldwide
Australian College of English - Brisbane	Russo English Australia
Australian College of English - Cairns	Shafston International College
Australian College of English - City	Southbank Institute of Technology
Australian College of English - Manly	Swinburne University ELC
Australian College of English - Perth	Sydney Institute of TAFE English Centre (SITEC)
Australian Pacific College	TAFE English Language Centre Northern Sydney
Bond University English Language Institute	TAFE International Education Centre, Liverpool
CELUSA	TAFE SA English Language Centre
Centre for English Teaching, The University of Sydney	Taylor's English Language Preparation Program Waterloo
Curtin English Language Centre	The Centre for Macquarie English
Deakin University English Language Institute	The University of Newcastle Language Centre
Embassy CES Brisbane & Gold Coast Campuses	Think Colleges Pty Ltd
Embassy CES Darlinghurst Campus	UNE English Language Centre
Embassy CES Melbourne Campus	Universal Education Centre Pty Ltd
Embassy CES Perth Campus	University of Adelaide, English Language Centre
English Language Institute Victoria University	University of Canberra English Language Institute
Eurocentres Perth	University of Southern Queensland
Griffith English Language Institute	University of Tasmania, English Language Centre
Hawthorn English Language Centre	UNSW Institute of Languages
Insearch	UWA Centre for English Language Teaching
Institute of Continuing & TESOL Education (ICTE-UQ)	UWS College
Intensive English Language Institute	Viva College
Intercultural Education Today (ICET) Pty Ltd	Wollongong College Australia
La Trobe University International College	

## 11.2. About English Australia

English Australia is the national peak body for the English language sector of international education in Australia.

English Australia represents over 100 member colleges throughout Australia that provide quality English language programs to students and professionals from around the world. Over 80% of international students learning English in Australia choose to study with an English Australia member college.

English Australia was originally formed in the early 1980s (as the ELICOS Association) and was incorporated in 1990. It aims to establish a high professional and ethical standard in the work of member colleges, to assist member colleges in providing high quality educational programs, and to assist, strengthen and promote the interests of the English language sector and member colleges.

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