

English Australia

Using student feedback to inspire innovation

March 2015

Outcomes from the 2013 Australian English Language Barometer

&

A complementary resource for ELICOS providers to assist with self-reflection and identification of good practice in key areas of importance to students



2013 ELT Barometer Report



Australian Government
Department of Education and Training

The Australia English Language Barometer 2013 project is supported by the Australian Government
Department of Education and Training.

For further information, please visit the website <www.education.gov.au> or
<www.internationaleducation.gov.au>”.

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OVERVIEW

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 Australia's largest services export industry, generating over \$18 billion dollars in export revenue at its peak in 2009-10¹. Export income from the ELICOS² sector contributed over \$1.8 billion³ at its peak in 2008.

The past few years have been challenging times for Australia's international education sector. A number of factors led to 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 sector responded to the downturn with a range of strategies, one of which was a focus on 'the student experience'. The sector had long understood the importance of student word of mouth and the value of incorporating student feedback into a quality improvement cycle, however this had only ever been done at an institutional level. English Australia saw the need to take a sector-wide approach to understanding our students' experience and this coincided with the Council of Australian Governments (COAG) developing an International Student Strategy⁴ that included provision for international student surveys.

The ability to attract and retain international students is core business for ELICOS 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.

In an increasingly competitive global focus on international education, it remains critical for the ELICOS sector to ensure a focus on student satisfaction as a means to provide successful outcomes for international 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, continue to improve services, and maximise the students' experience.

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

² English Language Intensive Courses for Overseas Students

³ English Australia (2009) Survey of Major ELICOS Regional Markets in 2008

⁴ International Students Strategy for Australia 2010 – 2014 (COAG)

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.

On behalf of the ELICOS sector and as an initiative of English Australia with the support of the Australian government through the Australian Government Department of Education and Training, the first report for the English Language Barometer (ELB) was produced in 2009. A second survey was undertaken in 2011 and a comprehensive report was published entitled "Maximising the ELICOS Student Experience". This publication not only analysed the trends in student feedback emerging from the survey, but also provided a valuable set of resources to the industry, to support providers in developing their own strategies for ensuring continuous improvement in their student satisfaction levels.

In 2013 a representative sample of providers from the sector once again participated in a third survey. This report provides a summary of the key outcomes as an aggregate report of all participating providers and tracks key trends over the three surveys that have been run to date. In general, the report follows the format and structure of the ELB survey instrument: Marketing, Application, Arrival, Learning, Living and Support.

For the first time, the 2013 ELB findings are also compared to a Global ELB Benchmark. Survey results from an additional 6,166 students from 73 colleges from New Zealand, the USA and Canada were added to the 2013 Australia survey results to provide the Global ELB Benchmark.

Over 10,000 students participated in the ELB in 2013, sourced from 49 ELICOS providers. While this was a larger number of participants than 2011 there was a slight decrease in the response rate from 66% of the population of participating colleges in 2011 to 64%. The participating institutions represented a cross section of providers including university-based providers and private providers, and represented a similar sample to the 2011 participants. 90% of respondents held student visas which means that the non-student visa cohort is under-represented in the survey.

The feedback from respondents to the 2013 ELB was very positive, with the overall aggregated satisfaction sitting at a very high level and showing improvements on 2011 results. **Overall** 88% of students were satisfied or very satisfied with their Australian English language experience, trending upwards by 1% from the 2011 result of 87% and by 7% from the 2009 result of 81%.

Overall **arrival** satisfaction results were recorded for the first time and scored a high 91%. Overall **learning** satisfaction results increased from 87% in 2009 to 89% in 2013. Overall **living** satisfaction increased from 86% in 2009 to 90% in 2013.

The most impressive highlight of the 2013 overall satisfaction results is in the area of **support**. In the first survey undertaken in 2009, this area demonstrated the lowest results, with the average satisfaction level at only 76%.

Individual institutions and the sector chose this as an area of focus and over the next four years a range of initiatives were pursued, including individual institutional level projects that were shared at forums like the annual English Australia Conference as well as the development of the English Australia *Best Practice Guide in Providing Student Support Services*. The 2011 survey saw satisfaction levels increase from 76% to 83% and the 2013 survey results show a further increase to a high of 92%. This provides a pleasing contrast with the Global ELB result for support of 88% and demonstrates the value of the work done by Australian ELICOS institutions in response to low results in the first survey.

Each overall satisfaction indicator is the same or higher than the Global ELB outcomes, indicating that the Australian ELICOS sector is performing well.

The 2013 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.

1. Summary of key findings

1.1. Overall satisfaction

- 88% of students were satisfied or very satisfied with their Australian English language experience. This is an increase of 7% from the 2009 figure of 81% and is higher than the Global ELB result of 86%.
- Satisfaction with the arrival experience was recorded as a separate area for the first time and recorded a high 91% satisfaction rate. This was slightly higher than the Global ELB score of 80%.
- Overall learning satisfaction levels increased from 87% in 2009 to 91% in 2011 but decreased slightly in 2013 to 89%. This score is equal to the Global ELB.
- Overall living satisfaction levels remain high at 90% (the same as 2011), an increase compared with the 2009 score of 86% and again equal to the Global ELB.
- Overall support satisfaction levels have increased strongly to 92% (from 83% in 2011 and 76% in 2009) and are higher than the Global ELB result of 88%.
- 91% of respondents felt they had made progress in learning English since starting their course. When asked if they felt their course was value for money, 75% of respondents agreed. 81% of respondents agreed that studying English in this country has been better than they expected, a strong increase compared with 77% in 2011 and 69% in 2009.
- 82% indicated that they would encourage others to apply to their school and only 3% would discourage others. As with other scores, these show an improvement on previous surveys (72% in 2009 and 78% in 2011) and are better than the Global ELB score of 78%.

1.2. Marketing

- A significant number of respondents (72%) indicated that Australia was their first and only country of choice when deciding where to study, although a lower number than the 2011 figure of 78%.
- For those that considered other countries, the key competitors were USA (40%) and the UK (35%), with 25% considering Canada and 7% New Zealand.
- Despite considering other countries, 84% of respondents did not actually apply to any other country.
- Whilst there are many motivators for students to choose to study in Australia, the options that recorded the highest number of 'Very Important' responses were Quality of teaching (73%) and Personal safety and security (62%).
- 60% of respondents indicated that an education agent helped them choose the college, with agents becoming more popular as a support option. 24% indicated their parents helped with the decision (also increasing), while 22% were assisted by friends and 21% were influenced by someone who had studied at the college before (similar to previous years).
- Preparation for further study is the main reason for studying, rising from 48% in 2009 to 53% in 2011 and to 56% in 2013. The improvement of future employment opportunities was the next main reason for study at 24%, increasing slightly from 22% in 2011.
- 26% of respondents are undecided in what they will do after their studies are complete. 9% want to travel or take some time off, with only 14% considering employment options. The largest proportion (37%) will continue their studies in Australia. Only 8% will return home to continue study.

1.3. Application

- 88% of respondents were residing in their home country prior to commencing study in Australia. 10% were already residing in Australia.
- The majority of respondents (91%) held a student visa, while only 6% 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 50% of respondents to the 2013 ELB, having risen from 40% in 2009..
- The majority of respondents submitted their application through an agent (63%), although the number of ELICOS students who do so has declined over the last two surveys. The number of students applying via a university has increased to 20%. Direct online applications remain stable at 10%, with direct paper applications declining.
- Students show increasing levels of satisfaction with the service they received from agents, with 90% saying they were satisfied or very satisfied, compared with 87% in 2011 and 82% in 2009.
- 18% of students were dissatisfied with the time taken to process their visa, the highest level of dissatisfaction of all elements of the process that were queried.

1.4. Satisfaction ratings

Arrival

- Satisfaction scores for all 13 elements of the arrival experience are generally high and Australian ELICOS providers perform slightly better than the Global ELB when overall satisfaction levels are compared.
- In comparison to the Global ELB, satisfaction levels in Australia were higher in 6 out of the 13 elements but lower on 7 elements. The variation is generally not significant, although there is scope for Australian providers to focus on the following as potential areas for improvement:
 - Welcome/pickup at airport/railway/coach station
 - Condition of accommodation on arrival
 - Setting up a bank account

Learning

- Satisfaction scores in all 21 learning elements were high, with only one below 80%. All except one of the 2013 ELB satisfaction scores for learning were higher than the Global ELB.
- The highest levels of satisfaction (with levels over 92%) were recorded for all aspects of learning related to the teachers themselves. This is great recognition of the quality of teaching staff employed by Australian ELICOS providers.
- The lowest satisfaction was with the following (although both of these have improved since 2009):
 - Extra English language or study skills support classes
 - Non-classroom activities to help me learn English.
- In terms of the global benchmarks, there is scope for Australian providers to focus on the following as a potential area for improvement:
 - Extra English language or study skills support classes
- Satisfaction scores improved across 16 key learning areas, with strong improvement seen in the area of non-classroom based language activities, an area that saw the lowest level of satisfaction in 2009.

Living

- Satisfaction scores for 18 of the 25 living elements were 80% or higher. All except six of the 2013 ELB satisfaction scores for living were higher than the Global ELB.
- The highest levels of satisfaction (with levels over 93%) were recorded for the standard of the physical premises and the surrounding environment. There were also high levels of satisfaction with the ability to make friends from the student's home country as well as from other countries
- The lowest satisfaction was with aspects relating to cost and access to financial support.
- In terms of the global benchmarks, there is scope for Australian providers to focus on the following as potential areas for improvement:
 - Access to sports facilities
 - Internet access at my accommodation
 - Feeling welcome in this country
- Satisfaction scores improved across 15 of the 16 key living areas, with significant improvement in satisfaction recorded for Social activities, Safety and Worship facilities.

Support

- Satisfaction scores for 7 of the 9 support elements were 80% or higher. All except one of the 2013 ELB satisfaction scores for support were higher than the Global ELB.
- No support area recorded satisfaction levels higher than 90%, however the highest levels of satisfaction (with levels over 87%) were recorded for support provided pre-arrival:
 - Help & support with my visa application
 - Advice provided by my language school before travelling
- The lowest satisfaction was with aspects relating to advice related to employment.
 - Advice on employment/career options following my course
 - Advice & guidance on finding part-time work while in this country
- In terms of the global benchmarks, there is scope for Australian providers to focus on the following as a potential area for improvement:
 - Accommodation placement service
- Satisfaction scores improved across all 9 key support areas, with significant improvement in satisfaction recorded for Part-time work advice, Social organisation, Handling a complaint, Accommodation office and Careers advice.

1.5. Assessment of minimum and maximum results

- The ELB is an aggregate of data reported from participating schools. Analysis of the data for individual participating institutions showed a significant variation in the level of satisfaction on some items, but little variation in other key areas of importance such as the teaching quality.
- In general, the area of arrival services showed the least variation across providers, indicating that ELICOS providers are generally delivering these services to a consistent standard.
- Key elements showing significant variation in the area of learning related mainly to the physical premises and resources, reflecting the variety in the profile of ELICOS colleges across the sector. The results demonstrated remarkable consistency in student satisfaction with actual teaching and learning.
- In the learning area, the 2011 ELB recorded 5 elements with scores under 60% with 1 of these showing a minimum score of 37% (for the question related to technology). It is pleasing to note that no minimum score fell below 60% in 2013.
- Living experience was the area that recorded the greatest variation between minimum and maximum satisfaction levels. This level of variation in the living experience is to be expected with ELICOS colleges located in different states and territories, in different cities and in different locations within cities. This is highlighted by the fact that the largest variation of 51 was recorded for the question relating to the weather.
- The weakening of the Aus\$ since the 2011 ELB has resulted in the minimum for Accommodation cost improving from 35% to 41% in 2013 and for Living cost to improve from 23% to 36% in 2013.
- The support services area also recorded significant variation between minimum and maximum satisfaction levels in some elements.
- Key elements showing significant variation where colleges can take action were:
 - Advice on employment/career options following my course (although the minimum has increased from 41% in 2011 to 57% in 2013);
 - Advice & guidance on finding part-time work while in this country (although the minimum has increased from 45% in 2011 to 52% in 2013).

PART 1 – 2013 ENGLISH LANGUAGE BAROMETER OUTCOMES

2. Overview of the research

Since 2005, i-graduate (through the International Student Barometer) has tracked and reported feedback from over 500,000 international students in educational sectors from more than 200 countries. The International Student Barometer (ISB) is an independent and confidential feedback process for education providers, tracking the decision-making, perceptions, expectations, and experiences of students studying outside their home country. 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 their students a voice using a confidential, independent feedback process within the international student barometer methodology. Planning for the first English Language Barometer (ELB) commenced as an initiative of English Australia on behalf of the ELICOS sector. The Australian Government Department of Education and Training 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 and in 2013 a third iteration of the survey was run.

This report provides a summary of the key outcomes of the 2013 survey as an aggregate report of all participating providers and tracks key trends over the three surveys that have been run to date.

2.1. 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 2013 national survey and compared with the survey data from 2011 and 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 English Australia and the sector with the support of the Australian Commonwealth Department of Education and Training. The purpose of this report is to support the continuous improvement of the ELICOS student experience, based on comparative student data.

2.2. Research methodology

The English Language Barometer (ELB) was active as an online survey for two months in September and October 2013. The 49 participating English language colleges were provided with a unique hyperlink to the online survey for their international students.

The online survey was provided in the 11 languages spoken by the most significant numbers of students within the ELICOS cohort: Arabic, Chinese simplified, Chinese traditional, English, Italian, Japanese, Korean, Portuguese (Brazil), Spanish, Thai, Vietnamese.

Findings are benchmarked against the Australian ELB 2011 and 2009 datasets to show changes in opinion and experiences. The lists of participating institutions in 2013, 2011 and 2009 are included in Appendix A.

For the first time, the 2013 ELB findings are also compared to a Global ELB Benchmark. Survey results from an additional 6,166 students from 73 colleges from New Zealand, the USA and Canada were added to the 2013 Australia survey results to provide the Global ELB Benchmark. The list of participating institutions from these countries is included in Appendix B.

2.3. 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. 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.

3. Survey outcomes

3.1. Overall satisfaction

The survey results provide overall satisfaction levels for the four key areas of arrival, learning, living, and support, as well as satisfaction levels overall.

The most impressive highlight of the 2013 overall satisfaction results is in the area of **support**. In the first survey undertaken in 2009, this area demonstrated the lowest results, with the average satisfaction level at only 76%.

Individual institutions and the sector chose this as an area of focus and over the next four years a range of initiatives were pursued, including individual institutional level projects that were shared at forums like the annual English Australia Conference as well as the development of the English Australia *Best Practice Guide in Providing Student Support Services*. The 2011 survey saw satisfaction levels increase from 76% to 83% and the 2013 survey results show a further increase to a high of 92%. This provides a pleasing contrast with the Global ELB result for support of 88% and demonstrates the value of the work done by Australian ELICOS institutions in response to low results in the first survey.

Overall satisfaction results increased from 81% in 2009 to 87% in 2011 and have reached a new peak of 88% in 2013, again higher than the Global ELB figure.

Overall **living** satisfaction of 89% remains high having risen from 86% in 2009.

The only area that saw a small decline in satisfaction in 2013 was **learning**. Having reached an extremely high level of 91% satisfaction in 2011, this slipped back slightly to 89% in 2013.

Each overall satisfaction indicator is equal to or above the Global ELB outcomes, indicating that the Australian ELICOS sector is performing well in meeting students' expectations.

	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	Global ELB
Arrival overall	-	-	91%	89%
Learning overall	87%	91%	89%	89%
Living overall	86%	89%	89%	89%
Support overall	76%	83%	92%	88%
Overall Satisfaction	81%	87%	88%	86%

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The increase in satisfaction levels reported above also translates into an increased propensity to recommend their school/centre.

	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	Global ELB
Recommend school	72%	78%	82%	78%

Student responses to questions relating to outcomes remain positive. Whilst there was a slight downward trend for the two questions related to learning progress and value for money, 2013 saw a continuation of the improvement in colleges meeting expectations, with a new high of 81% of students saying that 'studying English in Australia has been better than I expected'.

	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	Global ELB
I have made progress in learning English since beginning this course of study	91%	94%	91%	-
I feel that my English course offers value for money	72%	78%	75%	-
Studying English in this country has been better than I expected	69%	77%	81%	-

Whilst the overall picture is very positive, consideration needs to be given to the aggregated source data that indicates a number of responses for individual providers on various metrics below a desired standard. Further information on individual minimum and maximum results can be found in *Section 3.7 Assessment of Minimum and Maximum results*.

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.

3.2. Profile and Responses

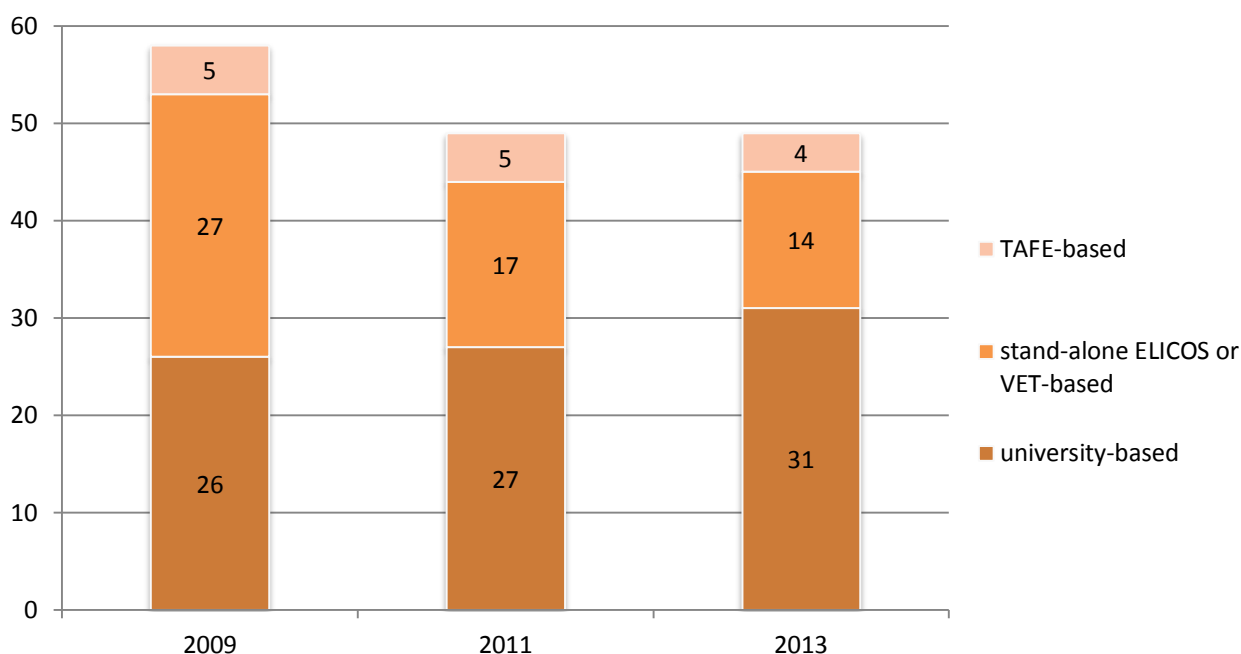
3.2.1. Representativeness of the sample

10,654 students participated in the ELB in 2013, sourced from 49 ELICOS providers, an increase in overall student participant numbers compared with 2011. Whilst showing a slight decline in the % of the student population of the participating colleges, the 2013 numbers showed an increase in terms of the % of ELICOS students in Australia. The strong response rate from the participating colleges provides a significant sample of the total ELICOS student population and continues to underpin the importance of the results in gaining a perspective on the performance of the sector as a whole.

	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	Global ELB
Number of providers	57	49	49	123
Number of respondents	10,716	8,772	10,654	16,730
Respondents as % of ELICOS student population of participating colleges	50%	66%	64%	-
Respondents as % of ELICOS students in Australia (approx.)	28%	26%	29%	-

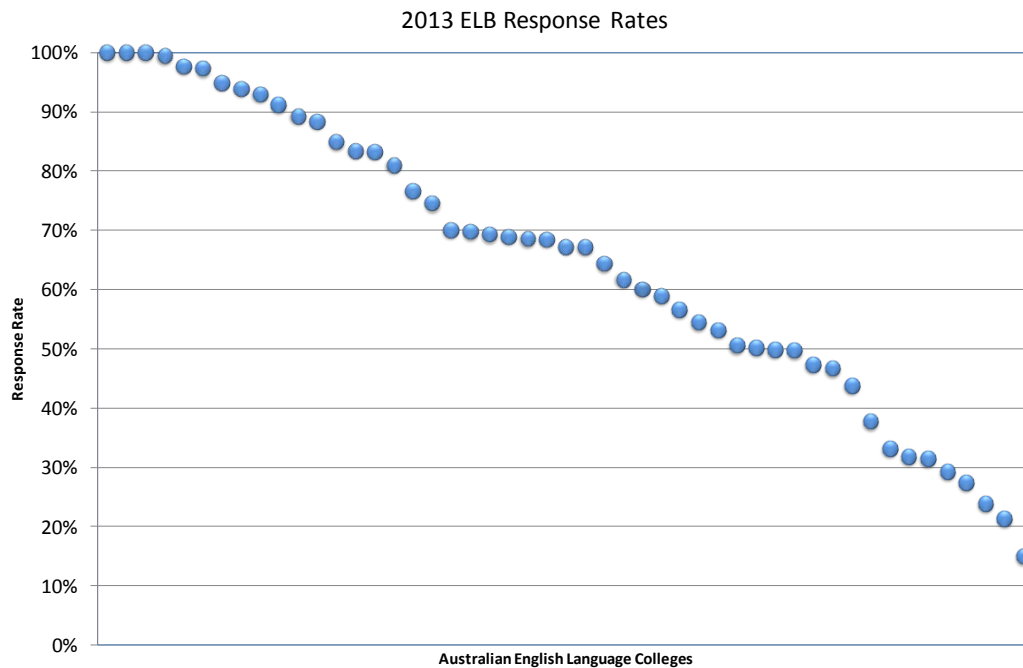
The 49 participating institutions represented a cross section of providers including university-based providers, stand-alone ELICOS or private VET-based providers and TAFE-based providers. Notably absent again were the smaller private providers that participated in 2009. This could be linked to the financial and time constraints of participating in the research.

Fig 1. Number of ELB institutional participants by type and by year



Student response rates varied considerably across the participating colleges. Three colleges were successful in achieving a 100% response rate amongst their students, whilst at the other end of the spectrum one college only achieved a 14% response rate.

Fig 2. 2013 ELB response rates



Respondents' age ranges mirrored that of the total ELICOS student cohort and were consistent with 2009 and 2011 survey findings, with 89% of all respondents aged over 18 and under 30 years. The largest respondent cohort of 56% came from students aged between 20 and 24 years. The gender of respondents was evenly spread with 49% of respondents being female and 50% male (1% chose not to respond).

The table below compares some key characteristics of the sample profile with the profile of the total ELICOS cohort in 2013.

Whilst there are some anomalies between the profiles of the total ELICOS student cohort and the survey population, the response rate is sufficient to allow for robust analysis and interpretation of the data.

Particular questions may need to be analysed with the variations identified on the following page in mind.

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2013 ELICOS student population		2013 Australian ELB			Comments
147,828 = approx. 36,957 per quarter		10,654			▪ Estimated approximately 29% of student population
62% student visas 38% non-student visas		90% student visas 10% non-student visas			▪ 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 both the 2009 and 2011 ELB.
China	17%	China	33%	↑	▪ All of the top source nationalities are represented in the sample.
Japan	12%	Japan	8%	↓	▪ Students from China, Brazil, Vietnam and Saudi Arabia are over-represented in the sample.
South Korea	12%	South Korea	5%	↓	
Brazil	7%	Brazil	14%	↑	▪ Students from Japan, South Korea, Thailand, Colombia, Taiwan and Italy are under-represented in the sample.
Thailand	6%	Thailand	3%	↓	
Colombia	5%	Colombia	3%	↓	
Taiwan	5%	Taiwan	2%	↓	
Vietnam	5%	Vietnam	9%	↑	
Italy	4%	Italy	1%	↓	
Saudi Arabia	3%	Saudi Arabia	6%	↑	
Switzerland	2%	Switzerland	1%	↓	
France	2%	France	1%	↓	
India	2%	India	2%		
Spain	2%	Spain	1%	↓	
Average course length = 12.9 weeks		32% studying more than 24 wks 39% studying 13-24 weeks 27% studying less than 13 wks			▪ 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.
Analysis of AEI pathway data indicates that approximately 39% 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 profile of the 2013 sample is identical to the 2011 sample.

3.2.2. Nationality

A total of 124 nationalities participated in the 2013 ELB research. 74% of respondents came from the key source markets of China, Brazil, Vietnam, Japan, Saudi Arabia and South Korea.

In 2013 over 147,828 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 62 percent of the cohort); tourist visas (19%); or working holiday and other visas (19%). The response rate is estimated at 29% of the total ELICOS enrolment during the survey period and 64% of the enrolment in the participating colleges. 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.

The breakdown by nationality shows a continuing dominance by China (at similar levels to 2011), with a third of the respondents, however the sample also includes an increase in numbers of respondents from the key source countries of Brazil and Vietnam.

Nationality	2009	2011	2013	Difference
China	23%	34%	33%	-1%
Brazil	5%	4%	14%	+10%
Vietnam	9%	4%	9%	+5%
Japan	7%	8%	8%	same
Saudi Arabia	13%	8%	6%	-2%
South Korea	14%	8%	5%	-3%
Colombia	4%	3%	3%	same
Thailand	5%	3%	3%	same
Taiwan	4%	4%	2%	-2%
Other	16%	24%	17%	-7%
Base	10,716	8,772	10,654	-1,944

Note: Percentages have been rounded to the nearest whole number

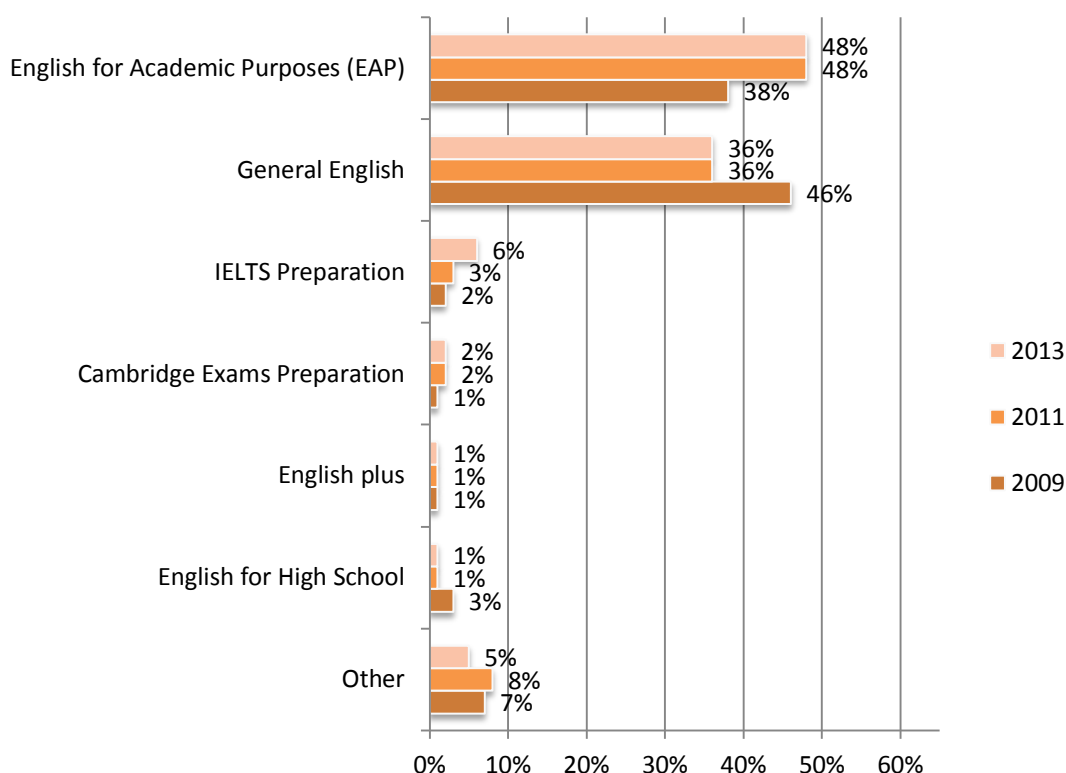
3.2.3. Course of study

There was no significant change in the profile of courses being studied in 2013 compared with 2011. The two main courses undertaken in 2013 were *English for Academic Purposes (EAP)* at 48% and *General English* at 36%. 6% were undertaking *IELTS Preparation* courses with all other courses studied by only 1% - 2% of respondents; 5% indicated they were studying a course that wasn't specified in the survey.

It is notable that 63% of Chinese students are undertaking English for Academic Purposes (EAP) programs, compared with only 48% of the total student body. The profile of respondents from Brazil and Vietnam matches the overall profile better, with 42% and 44% respectively undertaking EAP programs. Japanese students, however, show a very different profile, with 74% undertaking General English and only 14% EAP.

The consistency in the profile of courses compared with 2011 (and in contrast with 2009) reflects the consistency in the profile of the provider type participating in the survey.

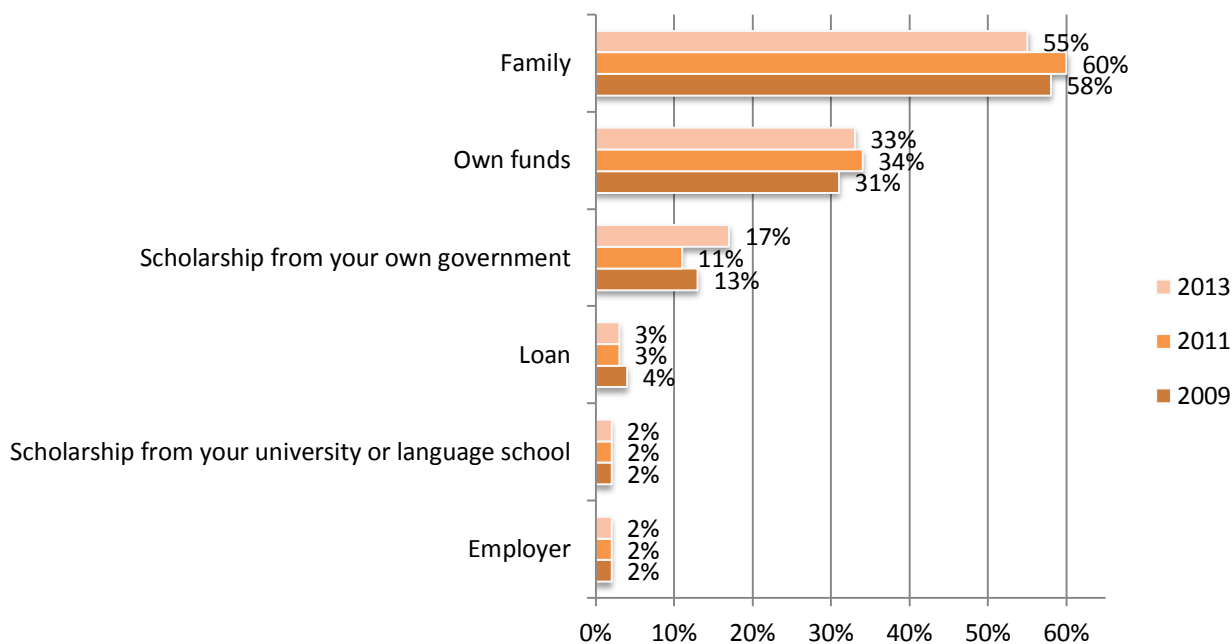
Fig 3. What type of course are you currently studying?



3.2.4. Funding of study

Funding sources for study have remained very similar in 2013 as in 2011 and 2009. Funding from family was once again the main source, with the next highest source of funding respondents using their own funds. There was an increase in funding from home government scholarships. Brazil (1,141) and Saudi Arabia (409) were significant source countries for students with government scholarships.

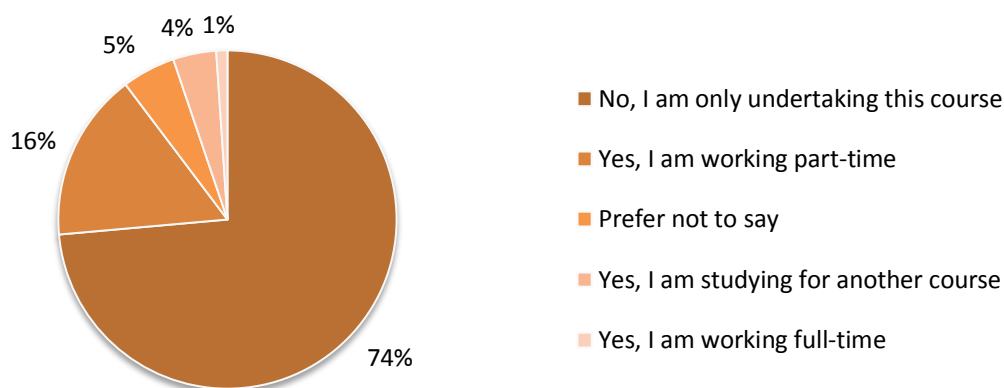
Fig 4. How are you funding your studies



3.2.5. Study and employment

The majority of respondents (78%) are not working while studying. 16% are working part-time while studying, a lower proportion than the 20% who worked part-time in 2011.

Fig 5. Employment status



3.3. 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:

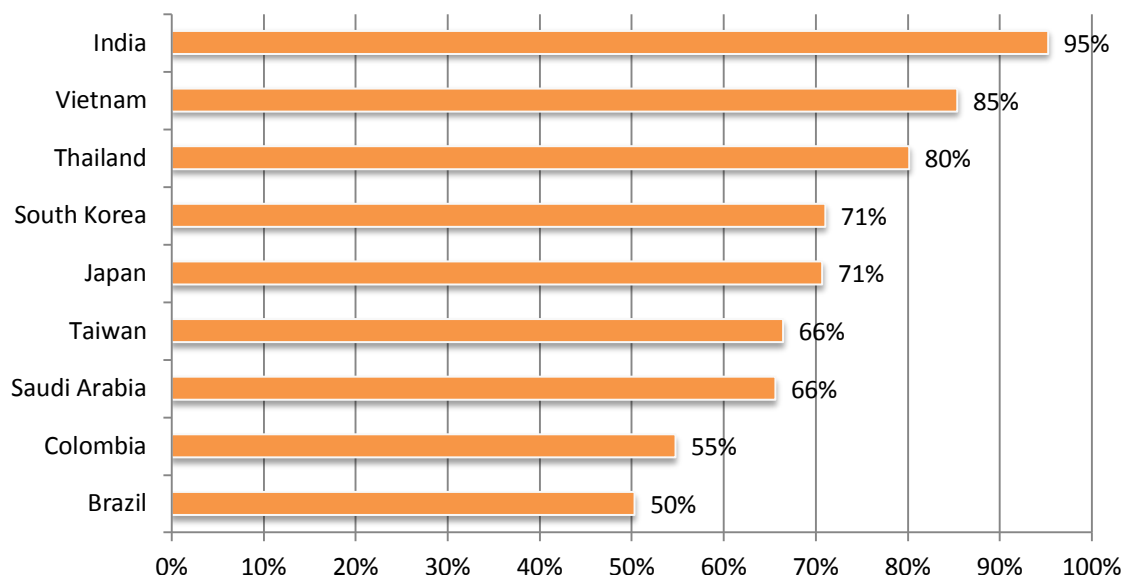
1. country selection
2. provider selection
3. influencers in decision-making
4. reasons for study
5. plans post study

3.3.1. Country Selection

A significant number of respondents (72%) indicated that Australia was their first country of choice when deciding where to study. This was down from 78% in 2011. 40% also considered the USA, with 35% considering the UK and 25% considering Canada. 7% considered New Zealand.

Different nationalities showed very different behaviours with regards to consideration of different destination options. Respondents from India, Vietnam and Thailand were most likely to select Australia as their first country of choice, while Colombian and Brazilian students were more likely to have alternative study destination options.

Fig 6. Was this country your first choice for your international language study? (% Yes)



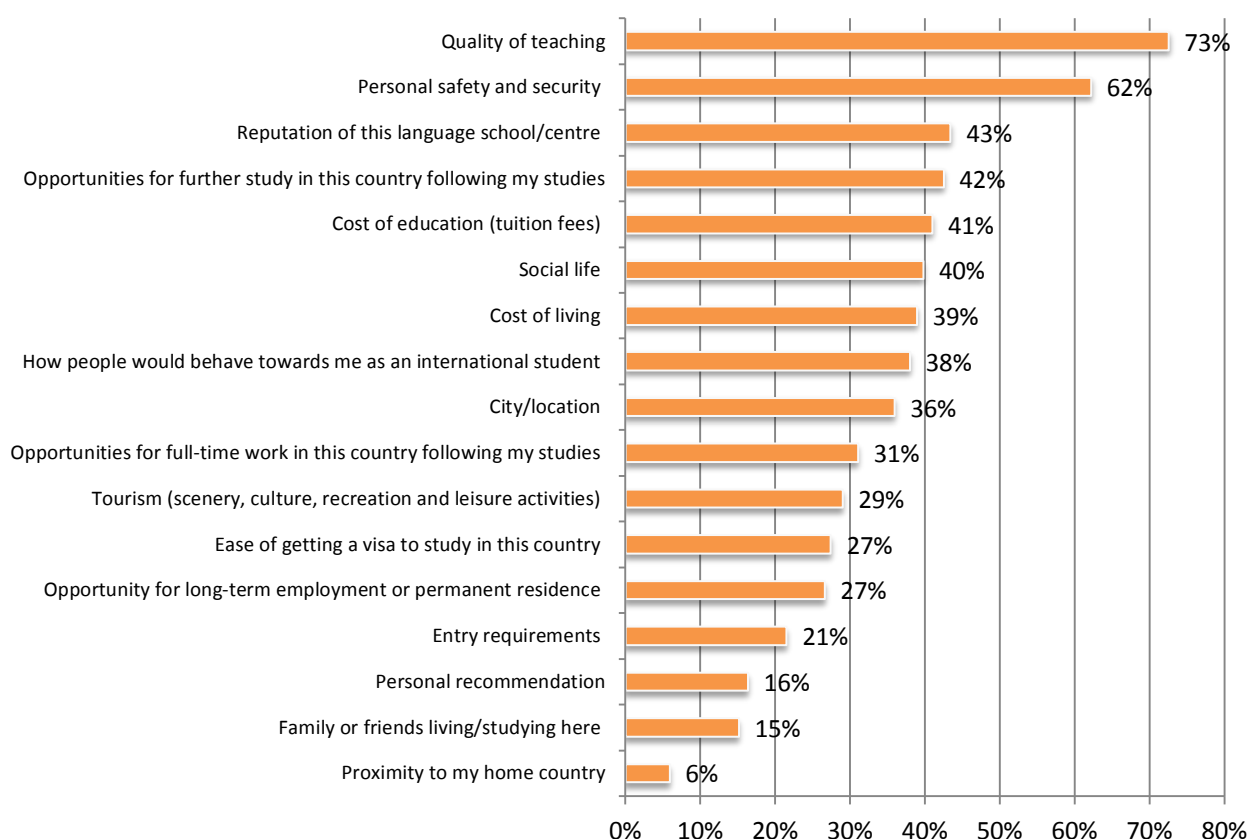
3.3.2. Reasons for Country Selection

There are a range of factors that students consider when deciding where to study and their relative importance is shown in the chart below. The top reasons respondents gave as being not just important, but 'very important' were the *Quality of teaching* and *Personal safety and security*.

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

In support of this, Austrade's education brand, Future Unlimited, aims primarily to highlight quality education outcomes and lifelong benefits. English Australia's 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 2013 ELB relate to cost considerations. Value for money will continue to be an important consideration.

Fig 7. How important were the following factors when deciding where to study English?



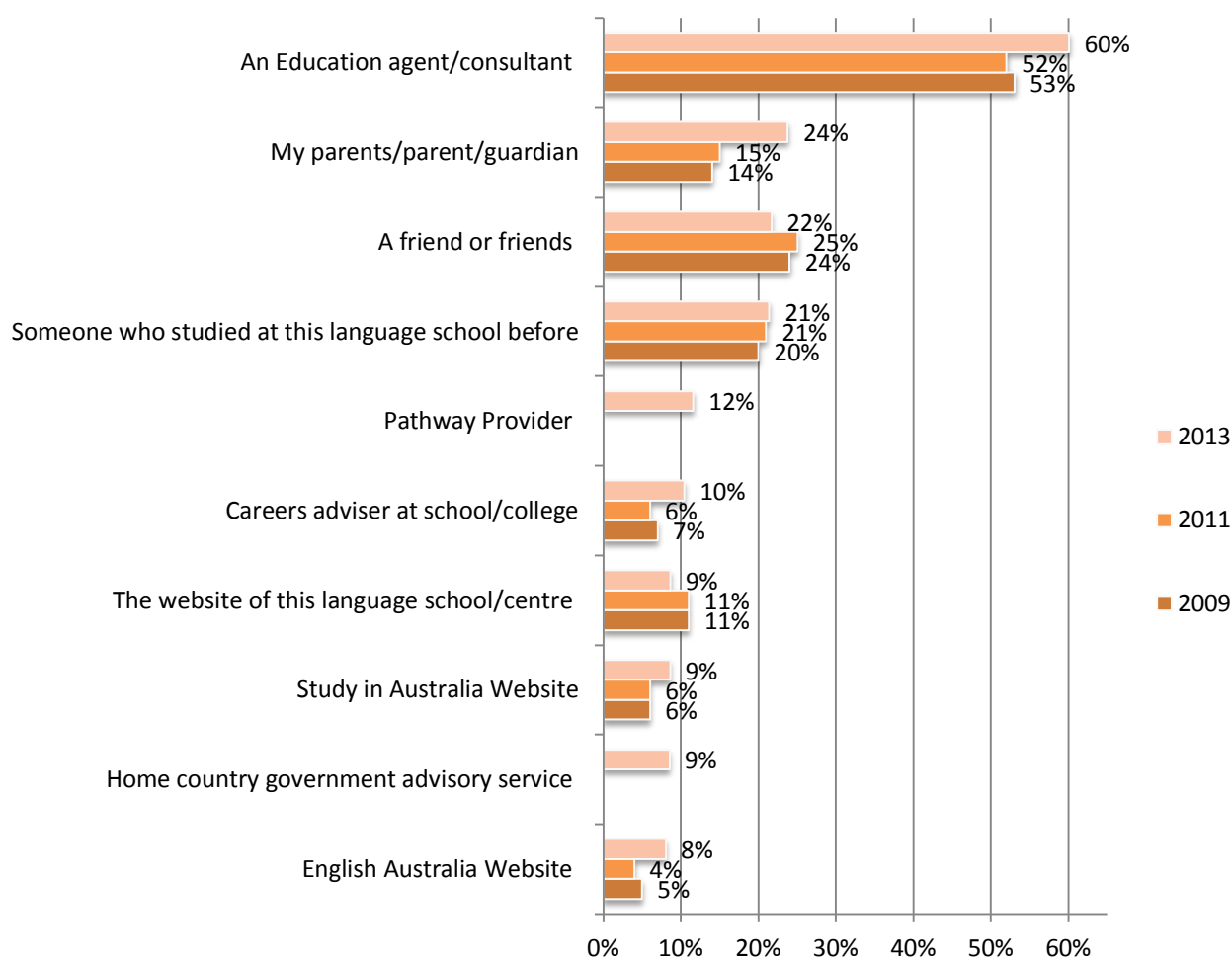
3.3.3. Influencers in Choosing a Language School

The role of education agents in advising students has increased in importance and remains the most important source of influence. 60% of respondents cited *education agent or consultant* as the main influence in making their final choice of course or place of study, up 8% from 2011. *Parents* (24%), *friends* (22%) and *alumni* (21%) remain the next most influential factors. Parents have increased in importance compared with 2011. The importance of a language school being a *pathway provider* has been introduced for the first time in the survey this year and ranks as the #5 influence.

In regard to accessing course and provider information, 26% of students sourced this from websites. The website of a provider and various referral sites such as *Study in Australia* and *English Australia* continue to be an important source of information for students.

88% of students applied to study from their home country and as such, influencers in the decision process offshore should feature in marketing efforts.

Fig 8. Which of the following helped your decision to choose this school?

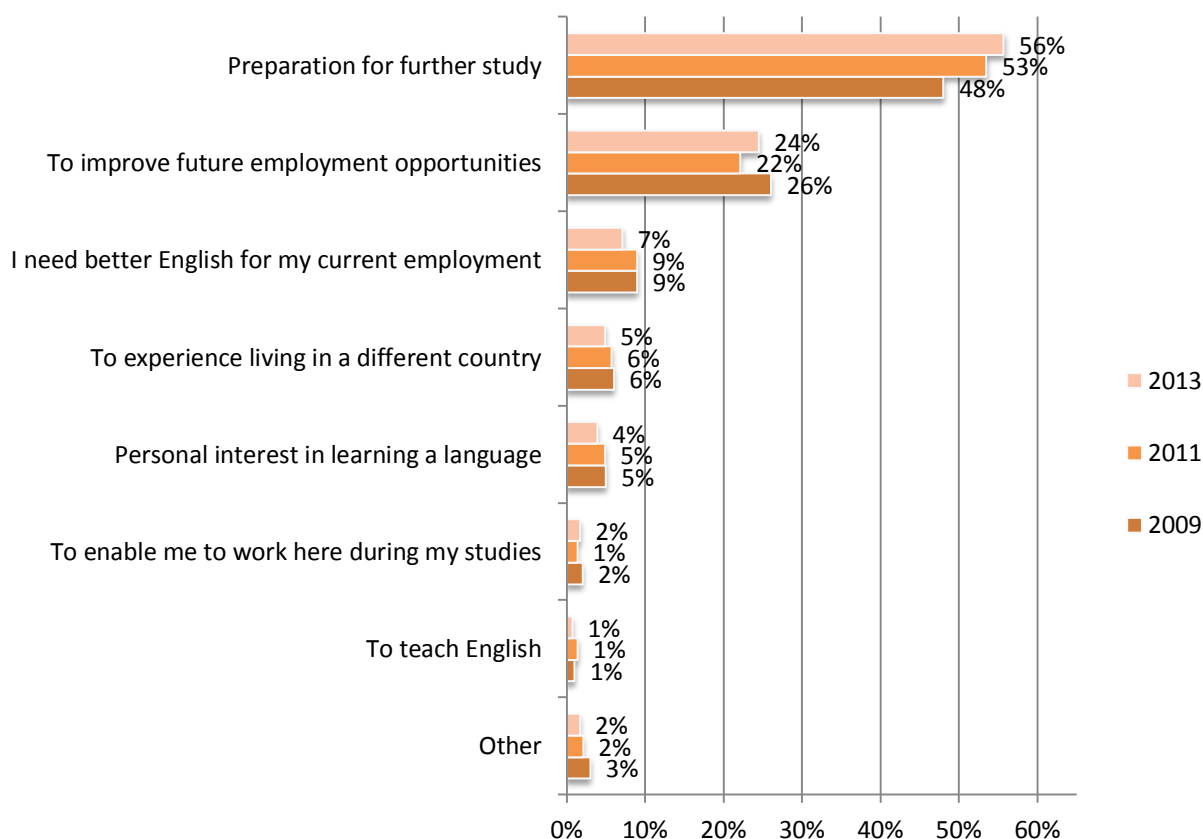


3.3.4. Reason for Study

The data showed that the reasons for study in 2013 were very similar to those from both 2009 and 2011, with two main reasons. *Preparation for further study* was once again the main reason for studying (with increasing importance), up from 48% in 2009 to 53% in 2011 and 56% in 2013, followed by *To improve future employment opportunities* at 24%, up from 22% in 2011.

71% of Chinese students were learning English primarily as preparation for further study, compared to 27% of South Korean students and 18% of Japanese students. The largest proportion (37%) of students from South Korea were studying to improve future employment opportunities with 40% of Japanese students also with this as their main reason for studying English. 18% of Japanese students were learning English for personal interest. 13% of Japanese and 12% of South Korean students were learning English to experience living in a different country, compared to only 4% of students from China.

Fig 9. What is the main reason that you chose to study an English language course?



3.3.5. Plans for after their English language studies

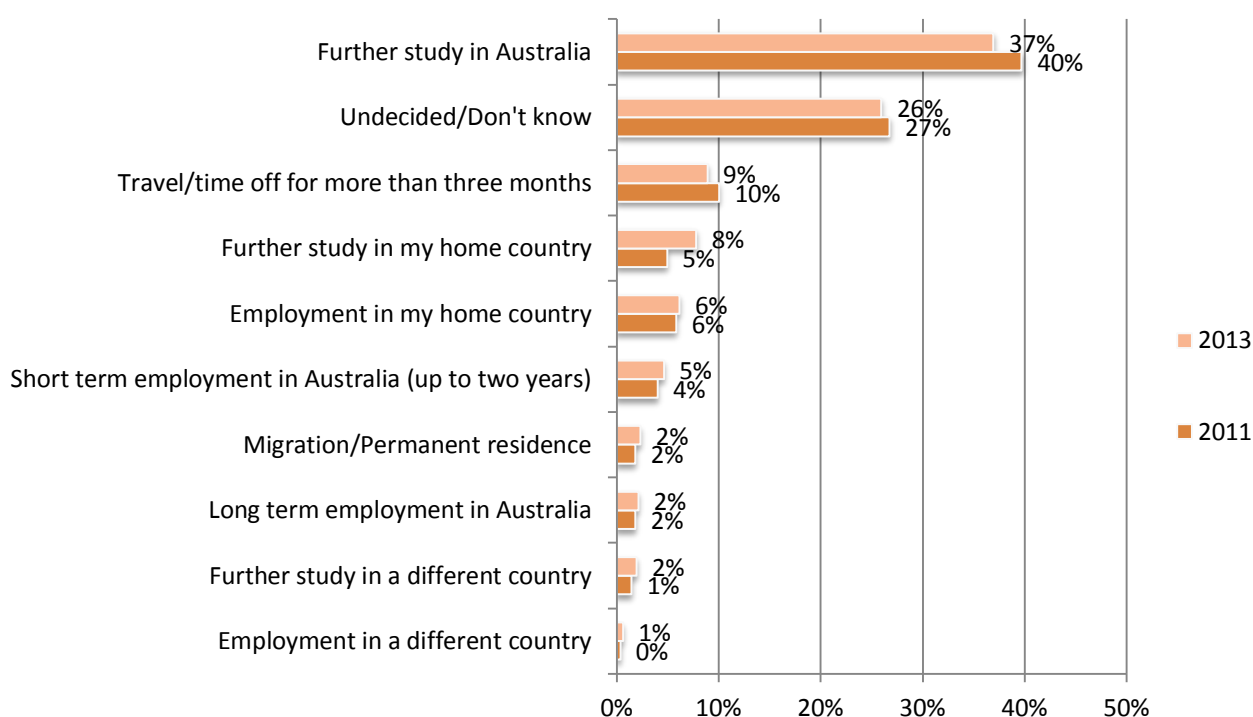
37% of students advised they would continue their studies in Australia, a disappointing decrease compared with 2011. 8% reported that they would return home to continue study with 2% intending to study in another country.

A high 26% were undecided as to what they would do after they completed their English language course indicating that there might be opportunities for this cohort to also be persuaded to consider further study in Australia as a possible option.

These findings provide useful data in regard to the importance of pathways, partnerships and the opportunity to target individuals who are undecided. There may be significant opportunities to on-sell further courses to this large group.

9% wanted to travel or take some time off, with only 16% considering employment options and only 2% considering migration options.

Fig 10. What do you plan to do after your current course of study?

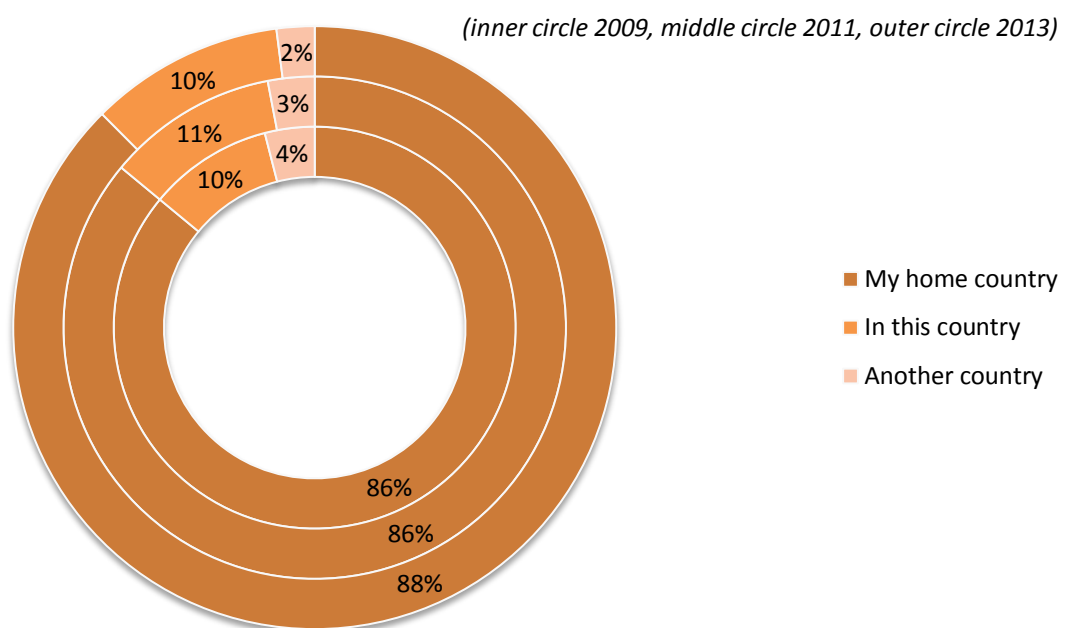


3.4. Application

3.4.1. Location before commencement of study

88% of respondents were residing in their home country prior to commencing study in Australia. 10% were already residing in Australia. There has been minimal change since 2009. These results indicate marketing efforts should continue to be targeted at the home country of residence.

Fig 11. Where were you before you began your current course of study?

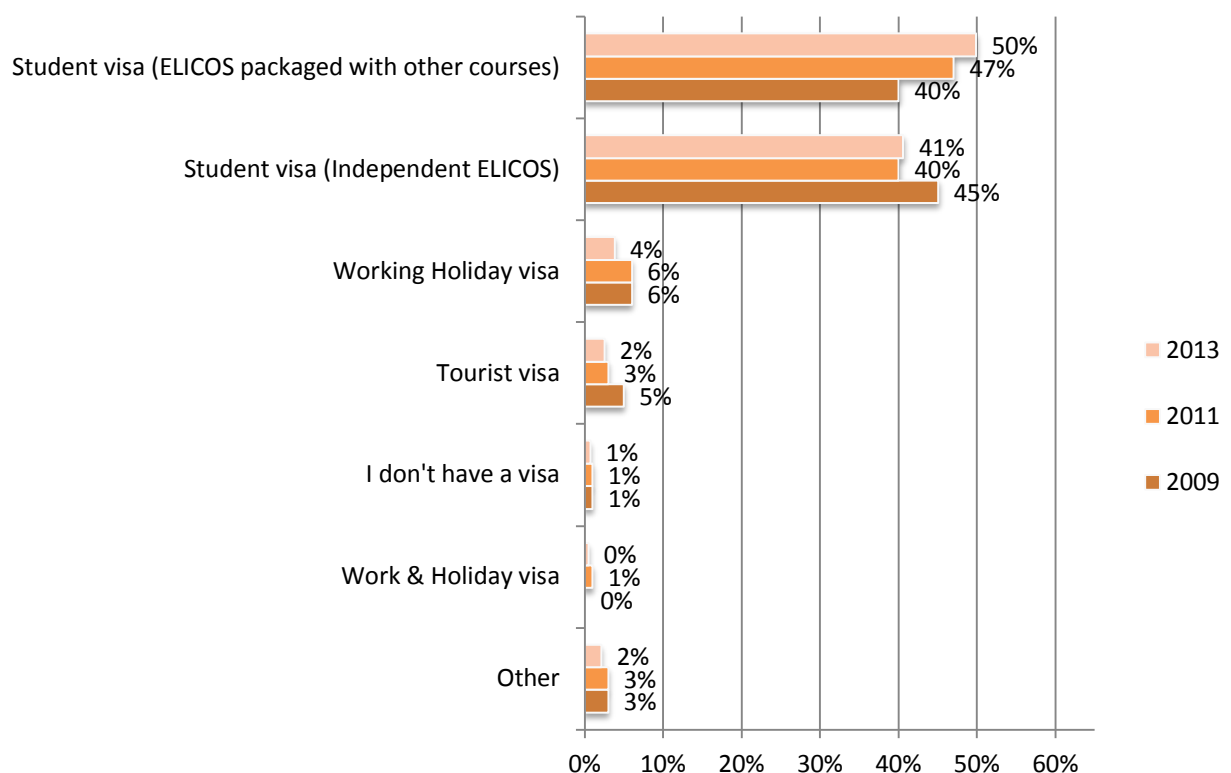


3.4.2. Visa Category

The majority of respondents (91%) held a student visa, while only 6% held either a tourist or working holiday visa. ELICOS packaged with other courses was the most used visa for respondents to the 2013 ELB with 50% of respondents, increasing from 47% in 2011. Independent ELICOS Visas increased slightly from 40% in 2011 to 41% in 2013.

Whilst 38% of the overall ELICOS student population held non-student visas in 2013, this cohort continues to be under-represented in the Barometer surveys.

Fig 12. What type of visa do you have?



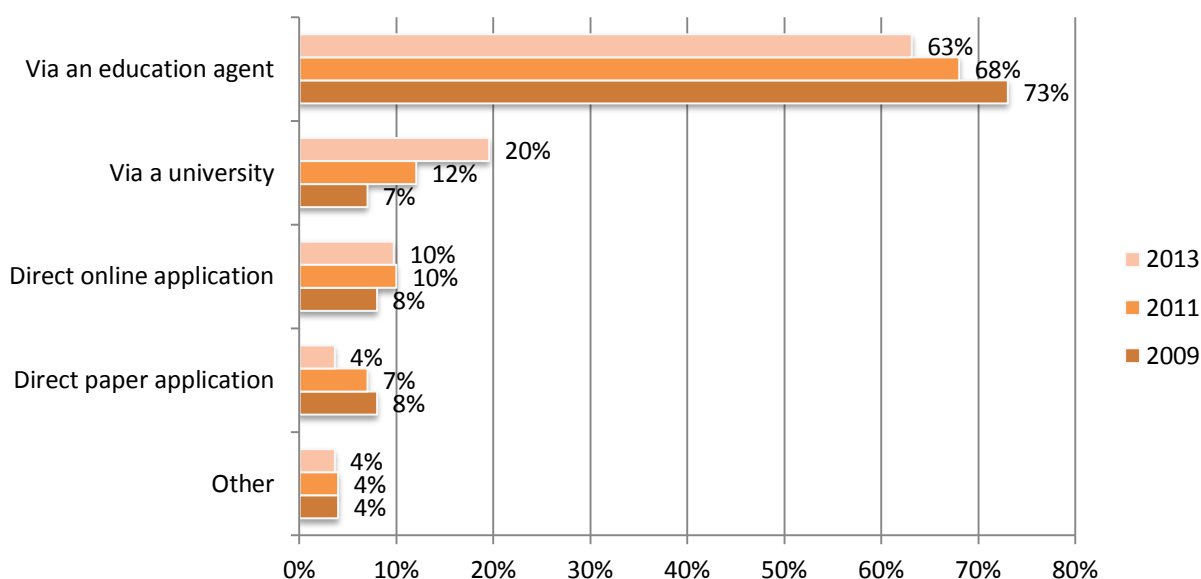
3.4.3. Application Process and Support

The majority of respondents submitted their application through an agent (63%), although the number of ELICOS students who do so has declined over the last two surveys.

With the increased number of university language centres participating in the barometer in 2013, it is logical to see that the number of students applying via a university has increased to 20%.

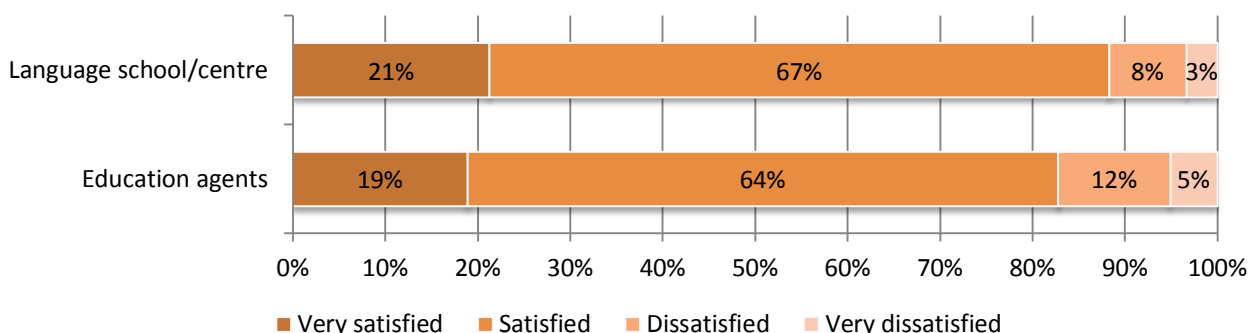
Direct online applications remain stable at 10%, with direct paper applications declining.

Fig 13. How did you apply for this language school?



Students seem generally satisfied with the pre-arrival advice they receive, although there is a higher level of dissatisfaction with education agents in this regard when compared with the advice received from the college itself.

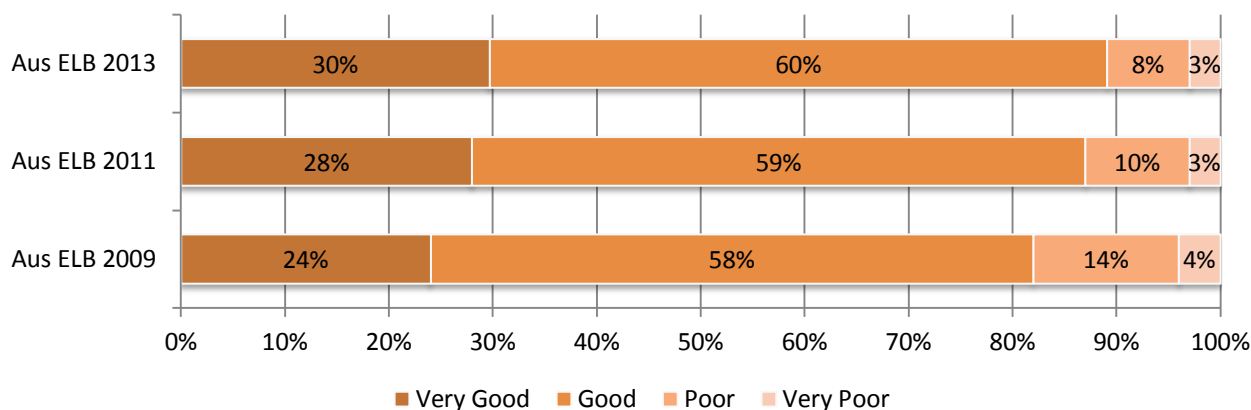
Fig 14. How satisfied were you with the accuracy of pre-arrival advice and information from..?



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Despite this, the barometer shows increasing levels of satisfaction when students are asked to rate the service they received from their agent (if they used one).

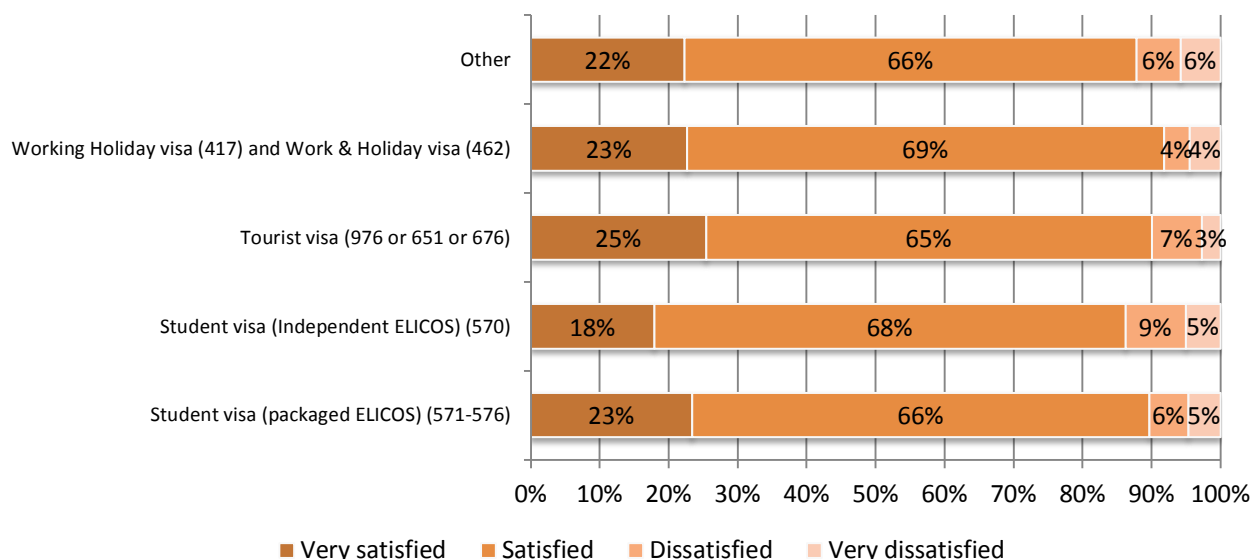
Fig 15. Please rate the service you received from your agent.



27% of students indicated that *'the ease of getting a visa'* was very important in country selection. 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 how students view the visa application process is important.

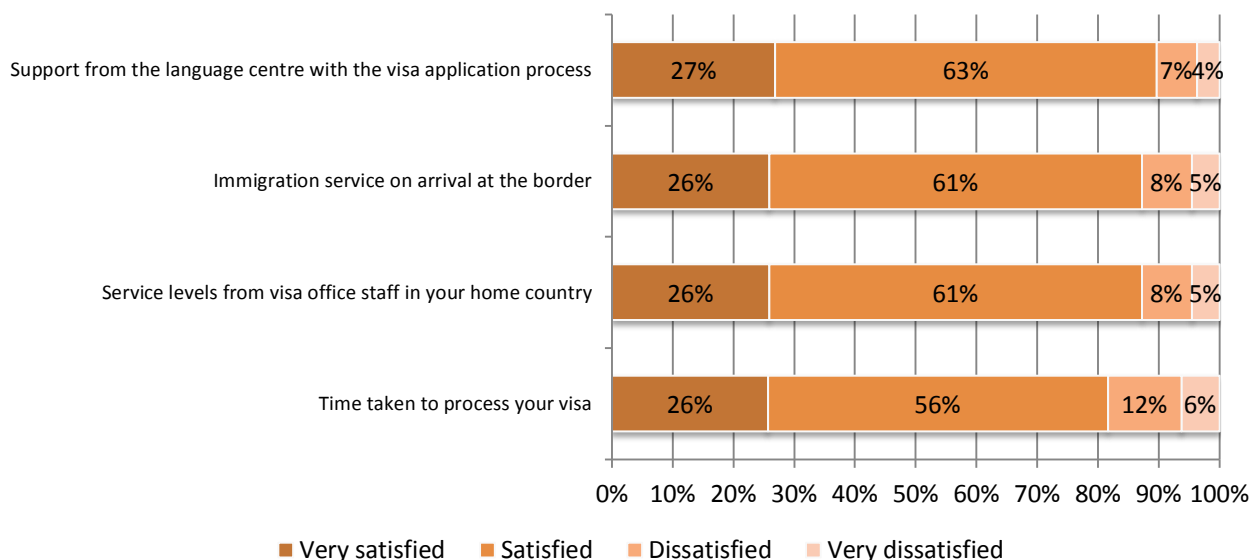
Students applying for an Independent ELICOS student visa recorded the highest levels of overall dissatisfaction with the process (14%). Inevitably, the cohort of survey respondents represents those students who were successful in gaining a visa.

Fig 16. Please rate your overall level of satisfaction with the visa application process.



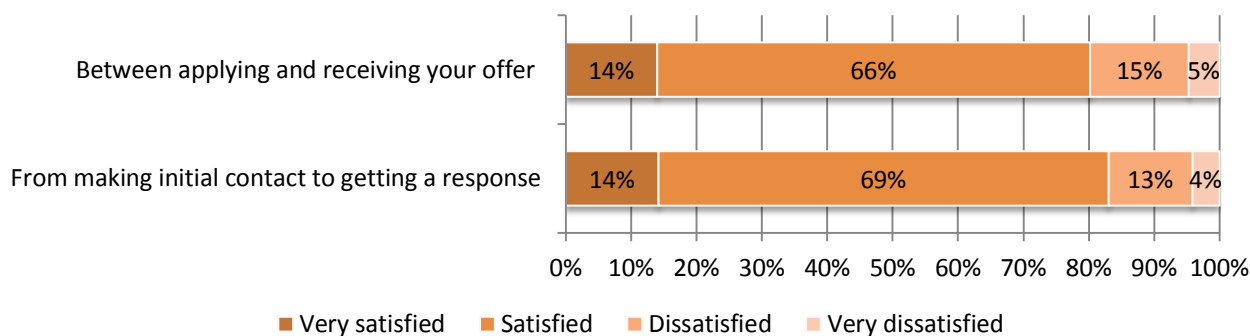
18% of students were dissatisfied with the time taken to process their visa – the highest level of dissatisfaction of all elements of the process that were queried. 11% were dissatisfied with the support from their language centre with the visa application process.

Fig 17. During the visa application process, how satisfied were you with the following?



Students seem generally satisfied with the general response times displayed by their college although there is room for improvement.

Fig 18. How satisfied were you with the response time from your college...?



3.5. Satisfaction Ratings

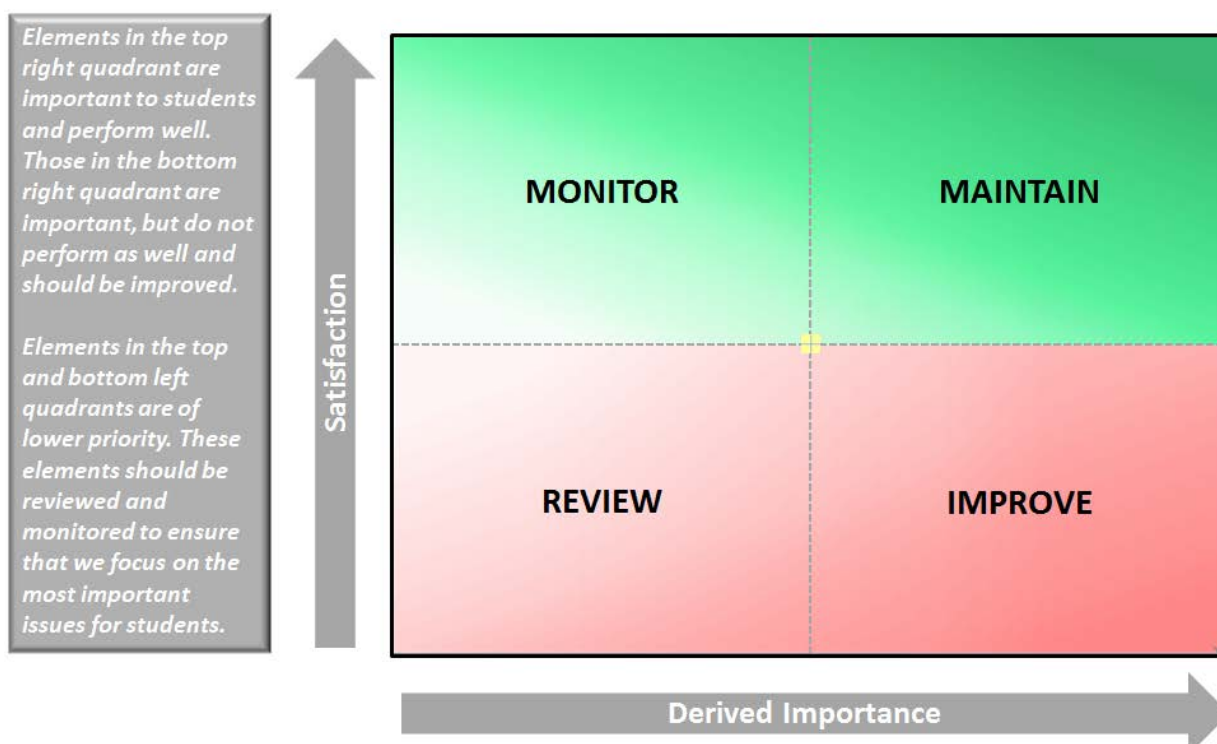
The following section considers the satisfaction of respondents across their arrival experience as well as their learning, living and support activities. The data captures students' experience and perceptions as compared with the 2011 ELB and 2009 ELB as well as with the global ELB benchmarks.

Derived Importance Matrix

Within the themes of learning, living and support, 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.

A Derived Importance Matrix is provided for each focus area of learning, living and support services.



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3.5.1. Arrival Experience

Questions specifically related to the arrival experience were added to the survey in 2013 so comparisons with previous years are not available.

Satisfaction scores for all 13 elements of arrival are generally high, and Australian providers perform slightly better than the Global ELB when overall satisfaction levels are compared.

In comparison to the Global ELB, satisfaction levels in Australia were higher in 6 out of the 13 elements but lower on 7 elements. The variation is generally not significant, although there is scope for Australian providers to focus on the following as potential areas for improvement:

- Welcome/pickup at airport/railway/coach station
- Condition of accommodation on arrival
- Setting up a bank account

ARRIVAL	Aus ELB 2013	Global ELB %	Global ELB +/-
	(% SATISFIED)		
AVERAGE OF ALL QUESTIONS	88.2%	89.0%	-0.8%
'Overall, how satisfied are you with the ARRIVAL EXPERIENCE?'	90.6%	89.2%	+1.4%
Course registration	93.6%	94.1%	-0.5%
Meeting teachers/academic staff	92.9%	92.7%	+0.2%
The welcome I received when I arrived at my language school	91.5%	91.2%	+0.3%
Language school orientation	91.2%	90.6%	+0.6%
Formal welcome at the language school	91.2%	91.1%	+0.1%
Welcome from my homestay family	91.1%	93.0%	-1.9%
Understanding how my course of study would work	88.9%	87.3%	+1.6%
First night – getting to where I would stay	85.8%	87.4%	-1.6%
Orientation (finding my way around the local area)	85.6%	85.2%	+0.4%
Setting up a bank account	85.6%	87.8%	-2.2%
Condition of accommodation on arrival	84.2%	86.6%	-2.4%
Assistance to obtain health insurance	83.2%	85.0%	-1.8%
Welcome/pickup at airport/railway/coach station	81.8%	85.4%	-3.6%

3.5.2. Learning

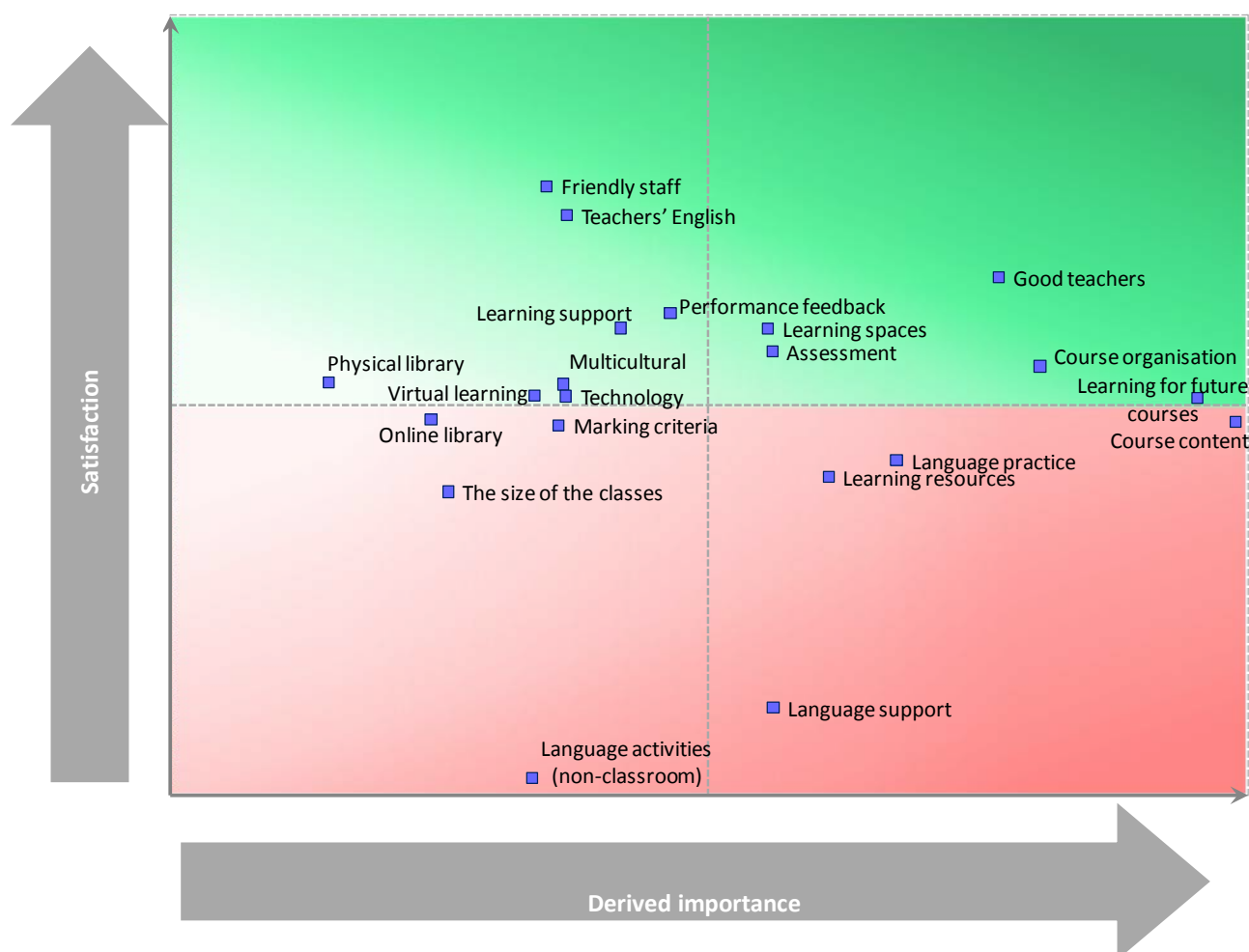
Learning Derived Importance Matrix

Those elements deemed important and scoring well included Learning for future courses, Course organisation and Good teachers.

Factors deemed important but not performing as well and requiring improvement included Course content, Language practice, Learning resources and Language support.

Elements of lower priority and importance to students included Physical library, Online library and The size of the classes.

Fig 19. Derived Importance Matrix – Learning



2013 ELT Barometer Report

Learning Satisfaction Scores – ELB 2013 compared to ELB 2009

The table at the bottom of the page ranks aspects of learning by the degree of improvement shown in student satisfaction levels in the four years since the 2009 ELB.

Significant improvement has been seen across a range of areas, including those four identified as priority areas for improvement in the Derived Importance Matrix as follows:

improvement since ELB 2009		
Course content	↑	+4%
Language practice	↑	+8%
Learning resources	↑	+6%
Language support	↑	+5%

Satisfaction scores improved across 16 key learning areas, with strong improvement seen in the area of non-classroom based language activities, an area that saw the lowest level of satisfaction in 2009.

Element	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	2013 vs 2009*
Language activities (non-classroom)	69%	76%	78%	10%
Technology	81%	86%	90%	9%
Learning spaces	84%	88%	92%	8%
The size of the classes	79%	85%	87%	8%
Language practice	80%	86%	88%	8%
Learning support	85%	89%	92%	7%
Learning resources	81%	86%	88%	6%
Multicultural	84%	87%	90%	6%
Learning for future courses	84%	89%	90%	6%
Performance feedback	87%	91%	92%	6%
Language support	76%	82%	81%	5%
Course content	85%	89%	89%	4%
Friendly staff	92%	95%	96%	4%
Assessment	88%	92%	91%	3%
Good teachers	91%	94%	93%	2%
Teachers' English	93%	95%	95%	2%

2013 ELT Barometer Report

Learning Satisfaction Scores – ELB 2013 compared to Global ELB

Satisfaction scores in all 21 learning elements were high, with only one below 80%. All except one of the 2013 ELB satisfaction scores for learning were higher than the Global ELB. The highest levels of satisfaction (with levels over 92%) were recorded for all aspects of learning related to the teachers themselves. This is great recognition of the quality of teaching staff employed by Australian ELICOS providers.

The lowest satisfaction was with the following (although both of these have improved since 2009):

- Extra English language or study skills support classes
- Non-classroom activities to help me learn English.

In terms of the global benchmarks, there is scope for Australian providers to focus on the following as a potential area for improvement:

- Extra English language or study skills support classes

LEARNING	Aus ELB 2013	Global ELB %	Global ELB +/-
	(% SATISFIED)		
AVERAGE OF ALL QUESTIONS	89.7%	86.1%	+3.6%
'Overall, how satisfied are you with the LEARNING EXPERIENCE?'	88.8%	89.1%	-0.3%
Staff/teachers who are friendly and approachable	96.1%	94.4%	+1.7%
Teachers who I can understand	95.2%	94.2%	+1.0%
The teaching ability of teachers	93.5%	92.8%	+0.7%
Feedback on work from teachers	92.5%	90.1%	+2.4%
Getting time from teachers/personal support with learning when I need it	92.1%	89.9%	+2.2%
The quality of the classrooms	91.9%	88.2%	+3.7%
Fair and transparent assessment of my work	91.4%	90.5%	+0.9%
The organisation and smooth running of the course	91.0%	88.5%	+2.5%
The physical library facilities	90.2%	82.1%	+8.1%
Studying with people from other cultures	90.1%	85.7%	+4.4%
Learning that will help me get onto a good course	90.1%	87.0%	+3.1%
Virtual Learning Environment (Blackboard, WebCT etc.)	89.7%	81.2%	+8.5%
The technology (computers, networking etc.)	89.6%	80.6%	+9.0%
The content of my course/studies	89.5%	88.2%	+1.3%
Explanation of marking/assessment criteria	89.2%	88.9%	+0.3%
The online library facilities	89.2%	77.9%	+11.3%
Opportunities to practise my English language skills	88.4%	83.6%	+4.8%
The learning resources (books etc.)	87.7%	81.7%	+6.0%
The size of the classes	87.2%	83.7%	+3.5%
Extra English language or study skills support classes	80.7%	82.0%	-1.3%
Non-classroom activities to help me learn English	78.4%	77.0%	+1.4%

3.5.3. Living

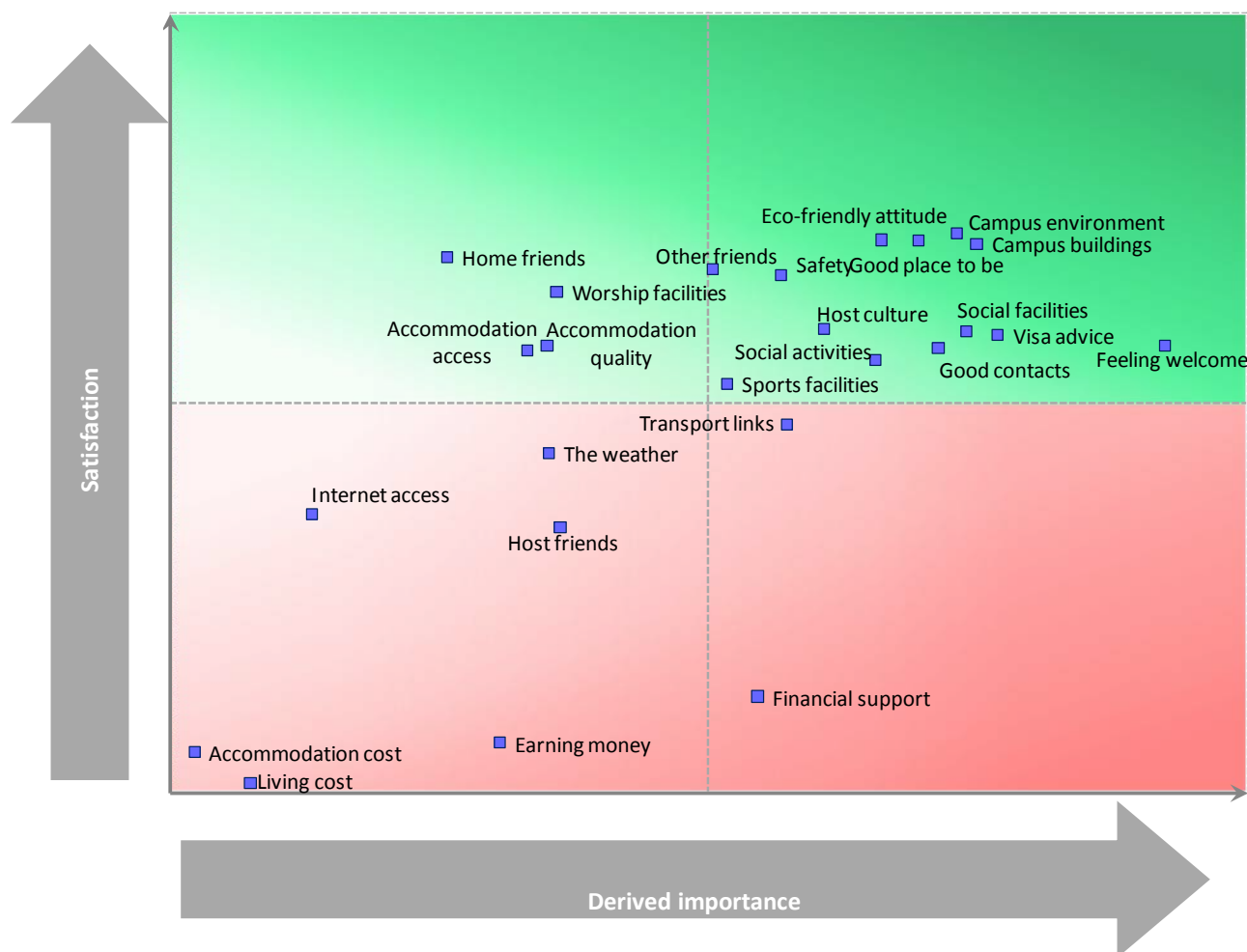
Living Derived Importance Matrix

Those elements deemed important and scoring well included Feeling welcome, Visa advice, Campus buildings, Campus environment, Social facilities, Good contacts, Good place to be, Social activities, Eco-friendly attitude, Host culture, Safety, Sports facilities, and Other friends.

Factors deemed important but not performing as well and requiring improvement included Transport links and Financial support.

Elements of lower priority and importance to students included Accommodation cost, Living cost, and Internet access.

Fig 20. Derived Importance Matrix – Living



2013 ELT Barometer Report

Living Satisfaction Scores – ELB 2013 compared to ELB 2009

The following table ranks aspects of living by the degree of improvement shown in student satisfaction levels in the four years since the 2009 ELB.

Satisfaction scores improved across 15 of the 16 key living areas, with significant improvement in satisfaction recorded for Social activities, Safety and Worship facilities.

Element	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	2013 vs 2009*
Social activities	71%	78%	85%	13%
Safety	80%	87%	91%	11%
Worship facilities	80%	86%	90%	10%
Internet access	67%	76%	73%	6%
Earning money	52%	66%	58%	6%
Accommodation quality	80%	83%	86%	6%
Home friends	88%	90%	92%	4%
Transport links	76%	74%	80%	4%
Accommodation cost	52%	52%	56%	4%
Good place to be	90%	94%	94%	4%
Host friends	69%	73%	73%	4%
Host culture	84%	86%	87%	3%
Feeling welcome	84%	87%	86%	2%
Other friends	89%	92%	91%	2%
Living cost	52%	49%	54%	2%
The weather	82%	76%	79%	-4%

Living Satisfaction Scores – ELB 2013 compared to Global ELB

The table on the following page shows that satisfaction scores for 18 of the 25 living elements were 80% or higher. All except six of the 2013 ELB satisfaction scores for living were higher than the Global ELB.

The highest levels of satisfaction (with levels over 93%) were recorded for the standard of the physical premises and the surrounding environment. There were also high levels of satisfaction with the ability to make friends from the student's home country as well as from other countries

The lowest satisfaction was with aspects relating to cost and access to financial support as follows. While there is very little that providers can do in relation to costs, it is certainly important that providers provide accurate information so that student expectations are realistic.

- The availability of financial support/bursaries etc.
- The opportunity to earn money while studying
- The cost of accommodation
- The cost of living (food, drink, transport and social)

2013 ELT Barometer Report

In terms of the global benchmarks, there is scope for Australian providers to focus on the following as potential areas for improvement:

- Access to sports facilities
- Internet access at my accommodation
- Feeling welcome in this country

LIVING	Aus ELB 2013	Global ELB %	Global ELB +/-
(% SATISFIED)			
AVERAGE OF ALL QUESTIONS	81.8%	79.5%	+2.3%
'Overall, how satisfied are you with the LIVING EXPERIENCE?'	89.5%	88.6%	+0.9%
The quality of the external campus environment	94.2%	90.0%	+4.2%
The surroundings outside the language school	93.6%	91.6%	+2.0%
The language school's eco-friendly attitude to the environment	93.5%	89.4%	+4.1%
The design & quality of the campus buildings	93.4%	87.2%	+6.2%
Making friends from my home country	92.4%	89.6%	+2.8%
Making friends from other countries	91.4%	90.8%	+0.6%
Feeling safe and secure	90.8%	90.5%	+0.3%
The facilities for religious worship (prayer room etc.)	89.8%	85.6%	+4.2%
Opportunities to experience the culture of this country	87.1%	86.1%	+1.0%
Immigration & visa advice from the language school	87.0%	87.1%	-0.1%
The social facilities (common room etc.)	86.9%	86.3%	0.6%
Feeling welcome in this country	86.0%	87.1%	-1.1%
The quality of accommodation	85.9%	84.6%	+1.3%
Making good contacts for the future	85.7%	83.7%	+2.0%
Access to suitable accommodation	85.5%	83.9%	+1.6%
The social activities (organised events or trips)	84.6%	84.5%	+0.1%
The sports facilities	82.8%	86.0%	-3.2%
The transport links to other places	80.0%	69.4%	+10.6%
The weather	78.7%	65.8%	+12.9%
Internet access at my accommodation	73.2%	76.1%	-2.9%
Making friends from this country	72.9%	68.3%	+4.5%
The availability of financial support/bursaries etc.	61.2%	54.7%	+6.5%
The opportunity to earn money while studying	58.2%	46.6%	+11.6%
The cost of accommodation	56.1%	63.4%	-7.3%
The cost of living (food, drink, transport and social)	53.8%	58.8%	-5.0%

3.5.4. Support

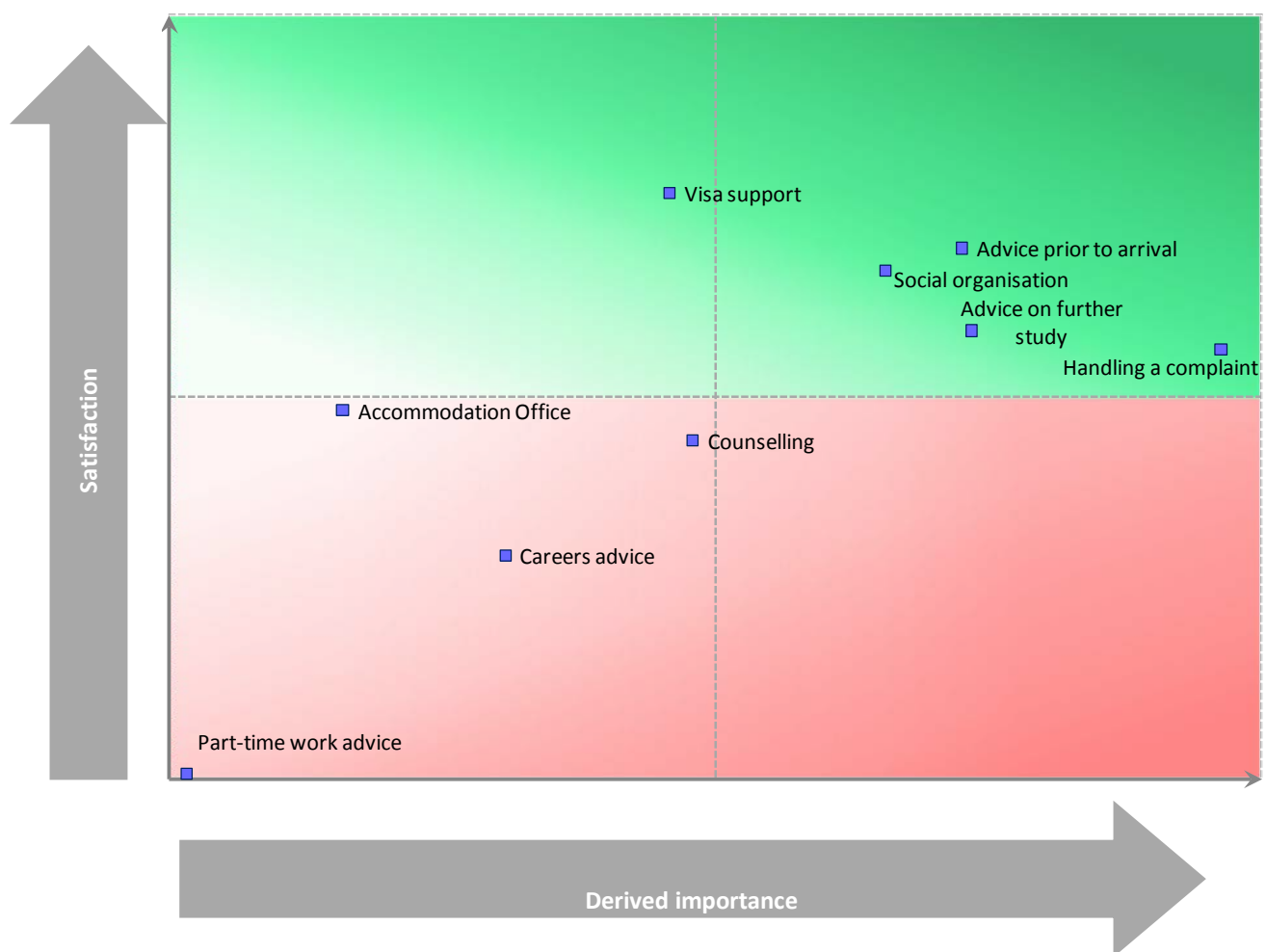
Support Derived Importance Matrix

Those elements deemed important and scoring well included Handling a complaint, Advice on further study, Advice prior to arrival and Social organisation.

There were no factors deemed important but not performing as well and requiring improvement.

Elements of lower priority and importance to students included Part-time work advice and Accommodation office.

Fig 21. Derived Importance Matrix – Support



2013 ELT Barometer Report

Support Satisfaction Scores – ELB 2013 compared to ELB 2009

The following table ranks aspects of support by the degree of improvement shown in student satisfaction levels in the four years since the 2009 ELB.

Satisfaction scores improved across all 9 key support areas, with significant improvement in satisfaction recorded for Part-time work advice, Social organisation, Handling a complaint, Accommodation office and Careers advice.

Element	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013	2013 vs 2009*
Part-time work advice	59%	68%	72%	13%
Social organisation	73%	83%	86%	13%
Handling a complaint	72%	82%	84%	12%
Accommodation Office	72%	79%	82%	11%
Careers advice	67%	75%	78%	11%
Counselling	73%	80%	82%	9%
Advice prior to arrival	80%	85%	87%	7%
Advice on further study	78%	85%	85%	7%
Visa support	84%	88%	89%	5%

Support Satisfaction Scores – ELB 2013 compared to Global ELB

The table on the following page shows that satisfaction scores for 7 of the 9 support elements were 80% or higher. All except one of the 2013 ELB satisfaction scores for support were higher than the Global ELB.

No support area recorded satisfaction levels higher than 90%, however the highest levels of satisfaction (with levels over 87%) were recorded for support provided pre-arrival:

- Help & support with my visa application
- Advice provided by my language school before travelling

The lowest satisfaction was with aspects relating to advice related to employment.

- Advice on employment/career options following my course
- Advice & guidance on finding part-time work while in this country

In terms of the global benchmarks, there is scope for Australian providers to focus on the following as a potential area for improvement:

- Accommodation placement service

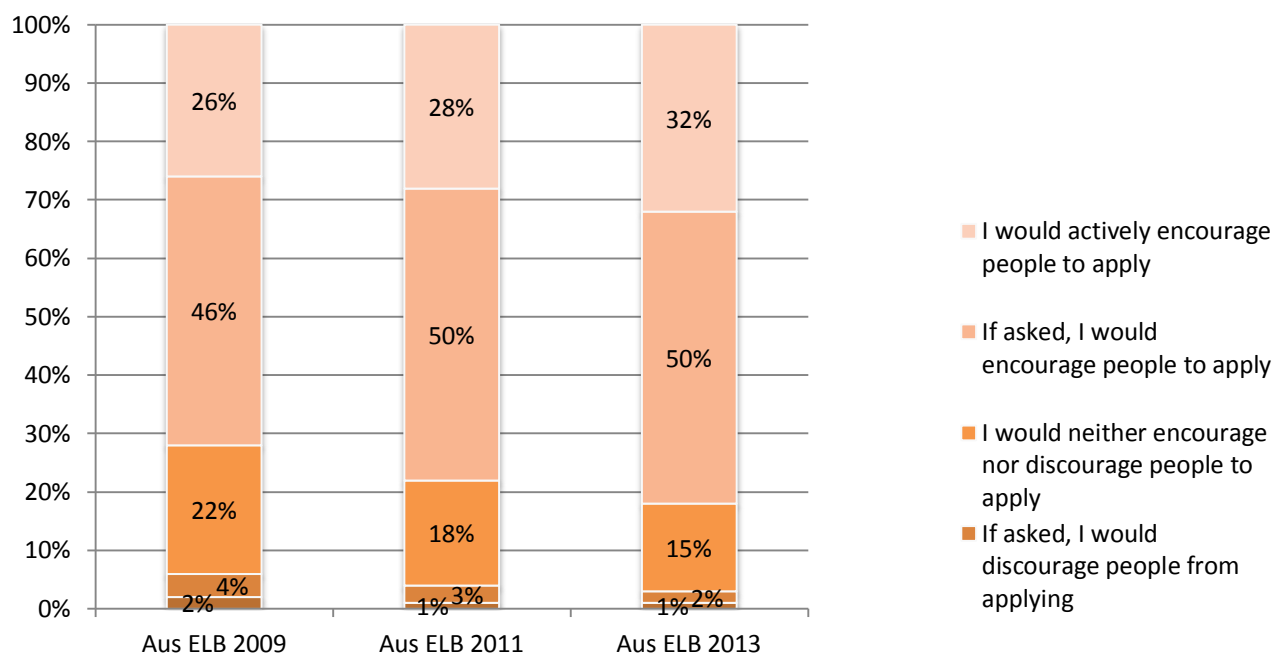
2013 ELT Barometer Report

SUPPORT	Aus ELB 2013	Global ELB %	Global ELB +/-
(% SATISFIED)			
AVERAGE OF ALL QUESTIONS	82.8%	80.8%	+2.0%
'Overall, how satisfied are you with the SUPPORT SERVICES?'	92.2%	87.6%	+4.6%
Help & support with my visa application	89.0%	85.7%	+3.3%
Advice provided by my language school before travelling	87.2%	86.1%	+1.1%
Social program organisation	86.2%	85.5%	+0.7%
Advice on further study following my English course	84.8%	82.4%	+2.4%
Handling a complaint	84.3%	79.8%	+4.5%
Accommodation placement service	82.2%	83.0%	-0.8%
Advice on finding medical care or counselling services	81.7%	81.2%	+0.5%
Advice on employment/career options following my course	78.1%	75.2%	+2.9%
Advice & guidance on finding part-time work while in this country	71.8%	68.1%	+3.7%

3.6. Recommendation

Respondents were asked if they *would recommend the English language school/centre to other students*. The results in 2013 were positive, with 82% saying they would encourage others to apply and only 3% who would discourage others. As with other scores, these showed an improvement since 2009 and were marginally better than the Global ELB scores.

Fig 22. Number Propensity to recommend – wave on wave comparison



	Aus ELB 2013	Global ELB %	Global ELB +/-
I would actively encourage people to apply	32%	32%	0%
If asked, I would encourage people to apply	50%	49%	+1%
I would neither encourage nor discourage people to apply	15%	16%	-1%
If asked, I would discourage people from applying	2%	2%	0%
I would actively discourage people from applying	1%	1%	0%

3.7. Assessment of Minimum and Maximum results

The ELB is an aggregate of data reported from participating schools. Analysis of the data for individual participating institutions showed a significant variation in the level of satisfaction on some items. The full table of minimum and maximum results can be found in Appendix C.

3.7.1. Arrival Experience

This area of focus had the least number of minimum scores under 70% (only 2 of the 13 elements) and the least significant degree variation between providers (only 4 elements with a variation more than 20 and only 1 of these with a variation more than 30). These are identified in the table below.

This sends the message that Australian ELICOS providers are relatively consistent in terms of student satisfaction with their arrival services.

In terms of the providers that are doing very well in the area of arrival, the maximum did not drop below 90% for any element.

	Aus ELB 2013	Min	Max	Variation
Orientation (finding my way around the local area)	86%	73%	96%	23
Setting up a bank account	86%	71%	98%	27
Assistance to obtain health insurance	83%	64%	96%	32
Welcome/pickup at airport/railway/coach station	82%	68%	96%	28

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3.7.2. Learning

This area of focus recorded minimum scores under 70% for 7 of the 21 elements. 12 of the 21 elements had a variation more than 20, with 4 of these showing a variation more than 30 and 1 element varying by more than 40. These are identified in the table below.

Key elements showing significant variation relate mainly to the physical premises and resources, reflecting the variety in the profile of ELICOS colleges across the sector. This also demonstrates remarkable consistency in student satisfaction with actual teaching and learning.

In the 2011 ELB, there were 5 elements that recorded scores under 60% with 1 of these showing a minimum score of 37% (for the question related to technology). It is pleasing to note that no minimum score fell below 60% in 2013.

In terms of the providers that are doing very well in the area of learning, the maximum did not drop below 90% for any element.

	Aus ELB 2013	Min	Max	Variation
The quality of the classrooms	92%	79%	99%	20
The organisation and smooth running of the course	91%	79%	99%	20
The physical library facilities	90%	60%	100%	40
Studying with people from other cultures	90%	74%	98%	24
Learning that will help me get onto a good course	90%	78%	100%	22
Virtual Learning Environment (Blackboard, WebCT etc.)	90%	70%	98%	28
The technology (computers, networking etc.)	90%	69%	100%	31
The online library facilities	89%	66%	100%	34
The learning resources (books etc.)	88%	66%	99%	30
The size of the classes	87%	64%	98%	34
Extra English language or study skills support classes	81%	65%	92%	27
Non-classroom activities to help me learn English	78%	66%	93%	27

3.7.3. Living

Living experience was the area that recorded the greatest variation between minimum and maximum satisfaction levels. This area of focus recorded minimum scores under 70% for 12 of the 25 elements. 22 of the 25 elements had a variation more than 20, with 10 of these showing a variation more than 30, 6 elements varying by more than 40, and 1 element varying by more than 50. These are identified in the table on the following page.

This level of variation in the living experience is to be expected with ELICOS colleges located in different states and territories, in different cities and in different locations within cities. This is highlighted by the fact that the largest variation of 51 was recorded for the question relating to the weather!

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There are some important things to note from the data, however. Key elements showing significant variation where colleges can take action were:

- Making friends from this country
- The social activities (although the minimum has increased from 54% in 2011 to 64% in 2013)

The weakening of the Aus\$ since the 2011 ELB has resulted in the minimum for Accommodation cost improving from 35% to 41% in 2013 and for Living cost to improve from 23% to 36% in 2013.

In terms of the providers that are doing very well in the area of learning, the maximum only dropped below 90% for 5 elements.

	Aus ELB 2013	Min	Max	Variation
The quality of the external campus environment	94%	77%	100%	23
The language school's eco-friendly attitude to the environment	94%	76%	100%	24
The design & quality of the campus buildings	93%	65%	100%	35
Feeling safe and secure	91%	77%	100%	23
The facilities for religious worship (prayer room etc.)	90%	74%	97%	20
Opportunities to experience the culture of this country	87%	75%	98%	23
Immigration & visa advice from the language school	87%	74%	97%	23
The social facilities (common room etc.)	87%	67%	95%	28
Feeling welcome in this country	86%	74%	98%	24
The quality of accommodation	86%	74%	96%	22
Making good contacts for the future	86%	75%	97%	22
Access to suitable accommodation	85%	76%	100%	24
The social activities (organised events or trips)	85%	64%	100%	36
The sports facilities	83%	62%	98%	36
The transport links to other places	80%	56%	94%	38
The weather	79%	49%	100%	51
Internet access at my accommodation	73%	60%	88%	28
Making friends from this country	73%	53%	95%	42
The availability of financial support/bursaries etc.	61%	39%	86%	47
The opportunity to earn money while studying	58%	43%	86%	43
The cost of accommodation	56%	41%	85%	44
The cost of living (food, drink, transport and social)	54%	36%	83%	47

3.7.4. Support

The Support services area also recorded significant variation between minimum and maximum satisfaction levels in some elements. This area of focus recorded minimum scores under 70% for 7 of the 11 elements. 10 of the 11 elements had a variation more than 20, with 6 of these showing a variation more than 30, and 1 element varying by more than 40. These are identified in the table below.

Key elements showing significant variation where colleges can take action were:

- Advice on employment/career options following my course (although the minimum has increased from 41% in 2011 to 57% in 2013)
- Advice & guidance on finding part-time work while in this country (although the minimum has increased from 45% in 2011 to 52% in 2013)

In terms of the providers that are doing very well in the area of support services, the maximum did not drop below 90% for any element.

	Aus ELB 2013	Min	Max	Variation
Advice provided by my language school before travelling	87%	75%	96%	21
Social program organisation	86%	73%	99%	26
Advice on further study following my English course	85%	71%	100%	29
Handling a complaint	84%	65%	96%	31
Time taken by my language school to respond to my initial contact	83%	69%	93%	24
Accommodation placement service	82%	63%	94%	31
Advice on finding medical care or counselling services	82%	65%	96%	31
Time taken by my language school to send my offer after application	80%	65%	96%	31
Advice on employment/career options following my course	78%	57%	94%	37
Advice & guidance on finding part-time work while in this country	72%	52%	94%	42

3.7.5. Reflections

Progress in learning English is the single element where the scores are remarkably consistent in terms of satisfaction across different providers, again reflecting the quality of the teaching in Australian ELICOS colleges.

Value for money is the element showing the most significant variation. ELICOS providers would do well to reflect on how they add value to the student experience and how they articulate the value proposition in their communication with students.

	Aus ELB 2013	Min	Max	Variation
I feel that my English language course has been worth the investment	83%	70%	93%	23
Studying English in this country has been better than I expected	81%	68%	94%	26
The language school experience has lived up to my expectations	80%	69%	94%	25
My course of study has been worth the investment of money	75%	61%	86%	25
I feel that my English language course offers value for money	73%	54%	85%	31
OVERALL SATISFACTION (% SATISFIED)	88%	79%	96%	17
RECOMMEND SCHOOL (% RECOMMEND)	82%	66%	94%	28
RECOMMEND THIS COUNTRY (% RECOMMEND)	87%	74%	98%	24

PART 2 – 2013 SUPPORT RESOURCE FOR PROVIDERS

Part 2 of this report was developed as a support resource for ELICOS providers and was designed to complement Part 1, which analyses the outcomes of the 2013 English Language Barometer (ELB) for ELICOS students in Australia.

This resource is compiled from contributions from colleges who participated in the ELB together with information from other useful sources including the English Australia Guide to Best Practice in Student Support Services (2009).

Part 1 outlines overwhelmingly positive student responses to their study experience in Australia, increasing in many cases from the 2011 survey and comparing very favourably with international benchmarks. However there are a number of areas where individual ELICOS providers could further enhance the experience students have while studying at their college and lessen the gap between minimum and maximum scores. This will support a more consistent approach to the provision of quality student support by colleges in Australia, thus strengthening 'Brand Australia' as an ELT destination.

The resource is aimed at managers, co-ordinators and teachers at ELICOS institutions and is designed to help them:

- reflect on current institutional and individual practice;
- identify areas for improvement;
- implement good practice.

Specific examples of good practice in ELICOS are outlined along with available resources.

4. Evaluating your student support services

The following table has been designed to help you reflect on the student support services you currently offer and identify areas of concern for future focus within your organisation's business plan.

	<i>This is a valued aspect of our service</i>	<i>This happens but could be better</i>	<i>This doesn't happen at our college</i>
<i>Business management</i>			
To what extent do senior managers at our college:			
<input type="checkbox"/> demonstrate a genuine concern for student welfare through policies and procedures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> have a willingness to allocate appropriate financial, personnel and material resources to provide support?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> identify one senior manager responsible for the leadership and management of student support services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	<i>This is a valued aspect of our service</i>	<i>This happens but could be better</i>	<i>This doesn't happen at our college</i>
To what extent do managers at our college:			
<input type="checkbox"/> consider the human impact of their decisions and policies on students and staff as well as on the financial bottom line?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> implement policies and procedures that minimise risk to student safety, security and wellbeing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ensure there are processes, services and facilities sufficient and appropriate to the number and nature of students, college programs, the students' goals and the location of the college, covering all shifts?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> implement a continuous evaluation of student support programs to ensure services are appropriate and relevant, and improvements are implemented in response to student feedback?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organisational culture			
To what extent do all those associated with our institution (eg teachers, managers, student services staff, marketing staff and education agents):			
<input type="checkbox"/> share an understanding of a positive approach to service, a concern for the individual and overall professionalism?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> demonstrate tolerance, fairness and a willingness to try and understand another's point of view, especially when English is not their first language, avoiding cultural stereotyping that serves to de-personalise students?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> have the opportunity to contribute to the planning, evaluation, review and renewal of services to support students in their study experience?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To what extent do staff involved in student support services:			
<input type="checkbox"/> feel that their role is important and valued and that the organisation values the students as people and not merely as economic units?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information & communication			
At our institution, to what extent is:			
<input type="checkbox"/> information about the institution's policies, services and facilities available to and shared by all stakeholders?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> key information about student support services accessible to and comprehensible by those who need it?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	<i>This is a valued aspect of our service</i>	<i>This happens but could be better</i>	<i>This doesn't happen at our college</i>
<input type="checkbox"/> background information about students gathered, including details of each student's background, pathway plans and time available as well as any other personal issues and needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> information, including identified issues, suggested approaches and follow-up, about students who need support stored in an accessible yet secure way?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> is communication effective between teachers, administration and management within the institution as well as between departments of the institution and students/parents and education agents?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff recruitment & professional development			
At our institution, to what extent does management:			
<input type="checkbox"/> employ staff with appropriate qualifications and experience who have empathy for and understanding of the student experience plus a willingness to communicate positively?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> remunerate specialist staff appropriately for their skills, knowledge and time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ensure staff induction offers opportunities to observe/spend time with staff working in different areas of student support, with a thorough orientation to their obligations and responsibilities to students under the National Code, ESOS and other local, state and federal legislation requirements?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> have a strategic approach to professional development management which meets identified needs of staff ie teachers, managers, admin, marketers, and the institution in supporting students eg customer service, cross-cultural awareness and communication and dealing with 'difficult' clients (this may include support to attend external professional development eg that provided by English Australia, IEAA and ISANA; membership of a relevant professional association eg ISANA; and access to clinical supervision as needed)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> provide staff across the institution opportunities for meetings and discussion to share what's happening in different areas and to find out what other staff are dealing with?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities			
To what extent does our institution:			
<input type="checkbox"/> identify a point (or points) for students (and staff) to access information, guidance and professional assistance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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	<i>This is a valued aspect of our service</i>	<i>This happens but could be better</i>	<i>This doesn't happen at our college</i>
<input type="checkbox"/> provide a private, quiet space for counseling students?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Networks			
To what extent does our institution:			
<input type="checkbox"/> have a strong relationship with its education agents and have confidence that they will provide accurate information, attempt to manage student expectations and help ensure the student will have a positive experience at the institution?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> require agents visit the institution to make sure their knowledge of the college, the local area and available student support is complete and up to date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> work with and use services offered by any associated organisation eg library, counselling & medical facilities at schools, VET colleges and universities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> have a network of local and community institutions and organisations that can be of assistance eg local, state and federal government departments, local hospitals, doctors (who understand the communication and emotional needs of international students), banks, service clubs, police etc?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Based on *Guide to Best Practice in Providing Student Support Services*, English Australia, 2009.]

Suggested procedure for action

1. Go through the points above and identify which areas your college could improve, particularly those that relate to the areas of focus outlined in this resource. You may find that they fall into categories which can be addressed together, or there may be isolated areas that need attention.
2. Consider a) the impact on students/business reputation if the areas are not addressed and b) the possible resource implications of making changes and decide on priorities for action.
3. Identify staff to take responsibility for these, making sure that a senior staff member has overall responsibility.
4. Develop a timeline with milestones for reporting on progress and ensuring that actions are on track.
5. Once any initiatives have been implemented, ensure that there is regular evaluation and review that includes student feedback.

College staff may be interested in a freely available resource the University of South Australia has developed to support their faculty in change management. See http://w3.unisa.edu.au/hrm/guidelines/managing_change_kit.pdf.

At the 2012 English Australia Conference Kevin Brett (i-Graduate), Diane McKeagney (VU English) and Sue Blundell (English Australia) outlined an approach to using the ELT Barometer outcomes to improve college practice. See

www.englishaustralia.com.au/visageimages/about_us/conference/2012_Conference/Blundell_Brett_McKean.pdf

This diagram⁵ represents one view of how a college can implement continuous improvement to its services for students.



Example of good practice

The University of Sydney Centre for English Teaching (CET) has recently implemented a significant process of identifying initiatives to improve the student experience at CET, several of which are innovative.

CET has a goal to transform how students engage in life at the Centre, within the University and in Australia. New engagement strategies will target each stage of the student life cycle (from pre-departure to post-course) with the aim of enhancing the overall student experience at CET and empowering students to become more proactive in their academic and personal development.

The restructuring of these initiatives, which are scheduled for implementation throughout 2015, has been developed using feedback from students together with comparative analyses of CET's existing engagement strategies and those of the University and other language institutions. The student feedback was acquired from information provided in counselling sessions with students and in student evaluations, as well as informally, via the student's classroom teachers.

After the student feedback and the data from the comparative analyses was collated, the next stage of the restructuring process involved investigating both the internal and external resources available to support and enhance the experience of our students. The final planning stage has been to develop the content and timing of the engagement projects and to effectively communicate them to all staff and students throughout CET.

⁵ Kevin Brett (i-graduate) – 2012 English Australia Conference presentation 'Using the ELT Barometer to drive increases in student satisfaction'

5. Areas of focus

Of the areas identified in Part 1 of this report as needing attention to ensure increased student satisfaction, the areas proposed below have been selected for their potential to enable the identification of practical support.

5.1. The arrival experience

How students are welcomed to Australia and their college sets the scene for their time in the country.

Satisfaction scores for all 13 elements of the arrival experience are generally high and Australian ELICOS providers perform slightly better than the Global ELB when overall satisfaction levels are compared.

In comparison to the Global ELB, satisfaction levels in Australia were higher in 6 out of the 13 elements but lower on 7 elements. The variation is generally not significant, although there is scope for Australian providers to focus on the following as potential areas for improvement:

- Welcome/pickup at airport/railway/coach station
- Condition of accommodation on arrival
- Setting up a bank account

5.1.1. general pre-arrival support

Allianz has developed an online [Student Welcome Services](#) (SWS) resource that providers can choose to offer international students. When a provider issues a student's CoE, the institution simply inputs brief details of that particular student in their administrator's account on the SWS platform. SWS will immediately generate an activation link for the institution's student and explain the steps required to complete the pre-arrival orientation program. The resource contains some useful general information for students and can be customised to include a college logo, a welcome page and other content: the generic content is available in Arabic, Chinese, Malay, Japanese, Korean, Vietnamese and providers can arrange translations of any customised content.

The [ISANA Rainbow Guide Orientation and Pre-Arrival Handbook](#) is a template comprising sections outlining information new students may need, including Pre-arrival, Settling in, Studying and Social and Cultural options. The Handbook is designed to be printed out or presented as a PDF. The sections of the Guide can be downloaded as a Word document and providers can customise and brand the resource fully to suit their students, their programs and their location. The Guide is colour coded to alert students to information that they need to know at different stages of their time at the college. Colleges need to provide their own translations.

[Insider Guides](#) produce a range of topic-specific and city specific guides designed especially for international students which are available free for download.

The following initiatives could be considered by colleges wishing to make sure their students are happier with specific aspects of their arrival experience.

5.1.2. welcome and pick-up on arrival

We all know that a friendly face at the airport can be a great start to a period of time spent away from home and family. Many colleges contract 'meet & greet' companies to make sure there is someone waiting for them at the other side of Customs and Immigration, who can take them to their accommodation and perhaps give some general information about the area on the way, and certainly someone who is used to talking to people who may be tired, worried and have low levels of English proficiency.

One college reports that homestay hosts undertake to meet their students at the airport. Another college uses local and international students from within its receiving institution to meet and greet students at the airport.

Among its many initiatives for international students Melbourne City Council has set up a [Welcome Desk](#) at Tullamarine Airport (at peak times of the year) to provide on-arrival information and help with any problems. Students who go to the desk are given a Student Welcome Pack with information about public transport, phone and internet and employment, taxes and banking. This information is currently available in English only and is suitable only for those students with high levels of English language proficiency, however many of the staff at the desk speak a language other than English.

5.1.3. condition of accommodation on arrival

Colleges ensure that their policies and procedures for student accommodation include checklists for all accommodation to make sure it is in an appropriate condition for students when they arrive. Whether it's a hotel room, homestay or student apartments, the accommodation has furniture and appliances in good working order and is clean and quiet.

Example of good practice

La Trobe Melbourne ensures that accommodation is booked in a nearby budget hotel or guest house in case there is an emergency, for example students may arrive at the university with no accommodation or pre-arranged accommodation may be unavailable or unsuitable.

5.1.4. setting up a bank account

Most banks enable students to set up an Australian account from their own country before they leave home (see [ANZ](#), [Commonwealth](#) and [Westpac](#)). However the information given for this is generally in English and may be difficult for those with low levels of English proficiency to understand.

Large universities may have access to a range of banks and banking facilities on campus. Many colleges report that banks are often willing to send representatives to the college for orientation days.

Examples of good practice

Colleges ask that homestay hosts help their students with opening a bank account and other needs for the newly-arrived.

Local students are recruited and paid to help ELICOS students set up their new life, including setting up a bank account, getting a transport card and making sure they know where the college/university facilities are and how they work. This also provides an opportunity for international students to meet and talk to a 'local'.

5.2. Learning

Satisfaction with aspects of the broad area of 'Learning' has increased each year since 2009, however there is still scope for further improvement, particularly in the area of providing resources outside the classroom that support language learning.

5.2.1. resources outside the classroom (including extra English language/study skills support classes) and activities outside the classroom to support language learning

Many colleges offer workshops outside class hours, at no charge to students, to meet the needs of students at risk of failing their courses: this is now the norm rather than the exception in pathway courses, especially English for Academic Purposes and Direct Entry Programs. More details are presented in the 'Examples of good practice' below.

Although there is no longer a requirement to spend time in independent learning many colleges offer opportunities to support meaningful student learning that supports what they have covered in class. Whether they offer print or online resources colleges can evaluate themselves against the following features of effective independent learning⁶, adapted from p. 8 of a 2004 resource published by NEAS:

- Those responsible for the management of the college support [independent learning] make appropriate resources available to set up and maintain a program;
- The goals are clear to all, through induction and ongoing information;
- The processes and materials offered meet the needs of the students;
- Students accept that independent learning can help them meet their study goals;
- The students are familiar with what is available to them and how they can access this;
- If available, the areas within the college set aside for independent learning are conducive to independent learning;
- Staff involved are knowledgeable and committed;
- The student-teacher ratio is appropriate to what is being offered, whether it is online or in print;
- Class teachers know what is available and are engaged with it.

Although much free online material is of questionable quality there is a plethora of online and hard copy resources available for purchase, and many colleges have developed their own programs to support independent learning (see the GELI model at www.griffith.edu.au/international/griffith-english-language-institute/campus-life/independent-learning-centre and the Navitas online resource at navitasenglish.com/mystudy). Students often need training in how best to maximise resources out of class, especially if their previous (language) learning experiences have not been independent.

A number of ELICOS colleges around Australia have contributed English lessons to the MOOEC, a free online resource.

⁶ Brandon, K. (2004). *Guided Individual Learning: A guide to best practice in English language teaching*. NEAS: Sydney

Examples of good practice:

- A process of formal identification of 'students at risk' operates in which teachers notify students if there is concern that they may fail their course. A form is completed with the specific areas that the students need to work on together with advice on where they can get support within and outside the college eg online materials, resources available in the college library or workshops provided *gratis* by the college.
- Colleges run a program, part of the classroom syllabus, to support students to become more independent learners by helping them identify their areas of weakness and introducing them systematically to a number of strategies and actions, available via the college, to remedy these.
- Free workshops are provided by the college in areas identified across programs where students are having particular problems eg writing skills for Arabic-speaking students; pronunciation focus for a particular language group; presentation skills. These workshops run for 1-2 hours weekly.
- As part of their contracts teachers are available for up to an hour every day to help students with problem areas in their learning. A booking sheet is posted in the class and students can put their names down for sessions of 15 or 30 minutes.
- Colleges where students will articulate to a receiving institution such as a school, a vocational college or a university on successful completion of their English study make sure that the students are familiar with libraries or other sites of independent learning they will have access to during their study. This characterises a close relationship between the English college and the receiving institution and is of great benefit to students.
- Colleges have set up language-focused social opportunities eg Book Clubs with graded readers; and Chat Clubs with opportunities to talk to other students, who may be international or Australian, or local people interested in talking to overseas students.
- A fully qualified and experienced 'Education Advisor' is employed for 3 days a week to provide the following for pathway students:
 - support for students at risk of failing;
 - tutorials and workshops for students in areas of language need;
 - assistance, via workshops or individual discussion, to teachers wishing to support their students more effectively in class.

Note: the cost of this position is rationalised in terms of increased student success and satisfaction, thus enhanced reputation and an increase in return business.

5.3. Living

This area has generally high levels of satisfaction but is slightly lower than the global index, and therefore provides an opportunity for colleges to consider and offer more options for students.

5.3.1. feeling welcome in Australia (making friends with Australians, social activities)

This is a perennial challenge for colleges to meet. **Making connections** from Day 1 is important, and Orientation can set the scene for future relationships.

A number of colleges have implemented Student Leadership Programs which offer ELICOS students training in leadership skills and opportunities to support their peers (see the MUELC model below). Several colleges attached to universities also provide incentives for local students to engage: these incentives may be financial or in the form of credit points.

Melbourne City has an international student program complete with a drop-in centre called The Couch. The aim is to enable local students and international students to meet (see www.melbourne.vic.gov.au/CommunityServices/ForYouth/InternationalStudents/Pages/Internationalstudents.aspx)

Note: many colleges report that, despite having a number of opportunities to get out and about in the community and/or to meet Australians, students are often reluctant to do so, perhaps through shyness or workload. Although students can't be forced to interact and engage, it appears that small group engagement can be most effective, and activities that include free food eg pizza are very well attended. A balanced and varied social program including tours to local places of interest, evenings in the pub, special interest 'clubs' (eg cooking, stop smoking, chess), discounts on continuing education classes offered to locals as well as active events such as football comps and scuba diving/surfing can be offered. An enthusiastic Social Program Coordinator who can connect with the students in a variety of ways is invaluable, and students can also be encouraged to participate in at least one initiative per five weeks, regardless of their study load.

Colleges report that volunteering can be highly effective in not only getting students out and about in the community but also creating links with Australians.

Examples of good practice

- Monash University English Language Centre (MUELC) runs a Student Leadership Program to assist new students' transition to the college and to Melbourne. Depending on intake numbers, a maximum of 10 ELICOS Student Leaders are recruited at the end of every term (5 weeks). To be eligible to become a Leader, students must be at Upper Intermediate English level or above and must be continuing their study at MUELC for at least a further 10 weeks.

Leaders are recruited via email/Moodle and invited to an interview session. Those selected are given two formal training sessions: one on leadership skills and one on communication skills. Training sessions are facilitated by Student Experience staff and the student counsellor.

Students remain in the Leadership Program for 10 weeks (two terms). In their first term they undertake formal training, run small-group 'Meet & Greet' sessions at student orientation and support the experienced Leaders during campus co-curricular activities. In their second term they

become the experienced Leaders, who take on greater responsibility for leading co-curricular activities, running the Information Desk and guiding the new Leader recruits.

At the end of their 10 weeks, Student Leaders are presented with a certificate and gifts during the 'Meet & Greet' activity, which has the effect of celebrating their achievements in front of their peers as well as generating interest about the Leadership Program among the new students.

- The University of Newcastle English Language Centre has set up a [Student Experience Program](#) that encourages local and international students studying at the university to take part in activities with ELICOS students. The university students get points towards their degree for sustained involvement in different initiatives and there are several strategies that encourage the ELICOS students to join.
- The University of Adelaide English Language Centre recruits local students from the university to deliver their ELICOS orientation. The orientation is very active, with the local students providing information for small groups of the newly-arrived, showing them around the campus and taking them to key places in the city where they can get the services they need. The new students thus have an engaging orientation experience plus an opportunity to meet and talk to local students.
- Colleges set up an ELICOS student committee to organise the social program, taking responsibility for planning and promoting activities and excursions. The committee leader liaises with the academic manager/Director of Studies regarding feasibility, need for insurance and budget.

5.3.2. expectations around the cost of living in Australia

The National Code requires colleges to make sure that students have a clear understanding of expenses they are likely to incur while living in Australia and it is crucial in terms of managing student expectations, that they have this information before they arrive here. Colleges ensure that this information is clearly available as part of their promotional material, and marketing managers make sure their staff are able to articulate this information to potential students easily at fairs and other contact points.

Education agents can play a key role in ensuring students have access to and understand this information, and colleges with healthy relationships with their agents make sure that they have all the information they need and that this is updated regularly.

The *Insider Guide*, a free online and print resource developed to inform international students about living in Australia, has excellent city-specific cost of living calculators that are detailed and easy to use. See www.insiderguides.com.au/cost-of-living/.

The Study in Australia website at www.studyinaustralia.gov.au/global/live-in-australia/living-costs provides a broad outline of how much it may cost to live in Australia, but this needs to be tailored to providers' specific location.

Example of good practice

- Colleges maintain college Facebook pages, accessible only by approved users, where newly-registered students can ask college staff, as well as current and past students, questions about aspects of living and studying in Australia.
- Colleges encourage students coming to stay in homestay arrangements to ask their hosts about costs in the area they'll be living in, before they come to Australia.

5.4. Support

Although **satisfaction with advice relating to employment during and after study** is higher than the global figure, it is among the lowest ranking in the area of Support, so there is room for Australian colleges to improve.

Study in Australia provides basic information on employment during study at www.studyinaustralia.gov.au/global/live-in-australia/working.

Some state governments have information (see Adelaide <http://studyadelaide.com/work/working-in-adelaide> and the NSW **Department of Industrial Relations** useful fact sheet for international students at www.industrialrelations.nsw.gov.au/biz_res/oirwww/pdfs/International_Students_Factsheet.pdf) and there is information in the Rainbow Guide and the Student Welcome Services resource.

ELICOS students can be exploited by their employers (see [this article in the MELD Magazine](#)). The Commonwealth government's **Fair Work Ombudsman's Office** has considerable information about work rights, especially how students should be paid, and there is a dedicated page for international students, together with a downloadable fact sheet, at www.fairwork.gov.au/about-us/policies-and-guides/fact-sheets/rights-and-obligations/international-students.

Most VET and higher education providers offer information to help international students find work during and after their study eg the University of Queensland www.uq.edu.au/international-students/working-in-australia-as-an-international-student and RMIT <http://www1.rmit.edu.au/careers/working-in-australia>. Providers might consider developing this type of information tailored to their students and to the work that is available locally.

Many colleges operate a Job Club, where students can find information and support to help them find part-time work to support their study (see 'Example of good practice below').

Much of the available information can be sent to students before they leave their home country, or disseminated through agents, so that students have more idea of what to expect when they arrive in Australia. Another option is to use the information as the basis of classroom lessons, providing the opportunity for discussion and questions.

Examples of good practice

Ability English in Sydney offers a weekly workshop comprising a 45 minute presentation on legal requirements and other issues around employment; advice on employer obligations eg tax, minimum wage, methods of payment; and support in finding employment, much of which is in the hospitality industry. This is followed by 30 minutes when students can get help in putting together a resume. For those students whose English level enables them to get part-time work within their own professional field Ability offers support in preparing a covering letter and advice on interview skills. Although this club has been running for some time and the workshop offers the same information every week there is always student interest. (see www.ability.edu.au/job-club/)

5.5. General

Value for money is the element in the general, overall reflection section of the survey showing the most significant variation between minimum and maximum scores. ELICOS providers would do well to reflect on how they add value to the student experience and how they articulate the value proposition in their communication with students.

There are many exciting programs and initiatives being offered by ELICOS colleges to ensure their students have opportunities to get the most out of their time at the college and in Australia (see previous sections). English Australia has recognised innovation in ELICOS with an annual award since 2010, and many past winners have focused on the student experience (see www.englishaustralia.com.au/innovation_award).

College managers can ask themselves:

- Apart from face-to-face classroom tuition and the support required for enrolment, what is our college doing to add value to the student experience?
- Is there anything else we could be doing that can enhance the student experience, including initiatives that may have minimal financial impact?
- Is there a clear focus in our promotional material for students of what we are doing?
- Does our student evaluation process incorporate reflection on the benefits of their study and their broader experience?
- Are we sharing our successes with the industry via conference presentations or journal articles?

Examples of good practice

- Colleges emphasise in promotional material the advantages of the Australian study experience in terms of meeting people, and learning and doing things they couldn't 'at home'. They clearly list the services and support students receive while they are studying.
- Student testimonials are shared on college websites and in brochures of how the overall experience of studying, working and/or travelling in Australia contributed to their life.
- Past 'graduates' are invited to talk to students at Orientation, outlining their successes and encouraging new students to take advantage of the opportunities they'll have to meet others.
- Teachers encourage students to reflect, throughout their study, on what they are achieving and the ways their experience is impacting on them.
- Students receive constant reminders, from teachers, managers, marketers and student services staff to make the most of the opportunities there are within their college as well as in their new Australian community to meet not only Australians (in their full and rich diversity) but also people from different countries and cultures with similar goals.

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APPENDICES

A. ELB Australian Participants – 2009, 2011 and 2013

2009	2011	2013	State	All 3 surveys
	Ability English Melbourne Ability English Sydney Academy of English	Ability English Melbourne Ability English Sydney	VIC NSW NSW	
		ACU English Language Centre, Brisbane ACU English Language Centre, Melbourne ACU English Language Centre, North Sydney	QLD VIC NSW	
ANU College			ACT	
Australian College of English - Cairns	Navitas English Cairns		QLD	
Australian College of English - Sydney			N	
Australian Pacific College				
Bond University English Language Institute CELUSA	Bond University English Language Institute CELUSA	Australian Pacific College Bond University English Language Institute CELUSA	NSW QLD SA	1 1 1
Centre for English Language Teaching, UWA Centre for English Teaching, The University of Sydney Curtin English Deakin University English Language Institute	Centre for English Language Teaching, UWA Centre for English Teaching, The University of Sydney Curtin English Deakin University English Language Institute	Central Queensland University Centre for English Language Teaching, UWA Centre for English Teaching, The University of Sydney Curtin English Deakin University English Language Institute Department of Education Tasmania (Tastafe)	VIC WA NSW WA VIC TAS	1 1 1 1 1
		Discover English Education & Training International ELS Universal English College	VIC WA NSW	
Universal Education Centre Pty Ltd Embassy CES Brisbane & Gold Coast Embassy CES Melbourne Embassy CES Sydney Embassy CES Perth	Embassy CES Brisbane Embassy CES Melbourne Embassy CES Sydney		QLD VIC NSW	
English Language Centre, University of New England	English Language Centre, University of New England English Language Company	English Language Centre, University of New England	WA NSW	1
Eurocentres Perth			WA	
Griffith English Language Institute Hawthorn English Language Centre Pacific Gateway International College Brisbane Pacific Gateway International College Sydney	Eynesbury College Academy of English Griffith English Language Institute Hawthorn Learning ILSC Australia - Brisbane ILSC Australia - Sydney	Eynesbury College Academy of English Griffith English Language Institute Hawthorne Melbourne ILSC Brisbane ILSC Sydney	SA QLD VIC QLD NSW	1 1 1 1

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2009	2011	2013	State	All 13 surveys
Institute of Continuing & TESOL Education (ICTE-UQ)	Institute of Continuing & TESOL Education (ICTE-UQ)	Institute of Continuing & TESOL Education (ICTE-UQ)	QLD	1
Intensive English Language Institute	Intensive English Language Institute	Intensive English Language Institute	SA	1
Intercultural Education Today (ICET) Pty Ltd			NSW	
La Trobe University International College		La Trobe Melbourne	VIC	
Mackay Language College			QLD	
The Centre for Macquarie English	The Centre for Macquarie English	Macquarie University English Language Centre	NSW	1
Matrix English			VIC	
Australian College of English - Bondi Junction	Monash College	Monash College	VIC	
Australian College of English - Brisbane	Navitas English Bondi	Navitas English Bondi	NSW	1
ACL Darwin English Centre	Navitas English Brisbane	Navitas English Brisbane	QLD	1
Australian College of English - Manly	Navitas English Darwin	Navitas English Darwin	NT	1
Australian College of English - Perth	Navitas English Manly	Navitas English Manly	NSW	1
ACL Sydney English Centre	Navitas English Perth	Navitas English Perth	WA	1
Perth Institute of Business and Technology (PIBT)	Navitas English Sydney	Navitas English Sydney	NSW	1
			WA	
RMIT English Worldwide	QUT International College	QUT International College	QLD	
Russo English Australia	RMIT English Worldwide	RMIT English Worldwide	VIC	1
Shalston International College			QLD	
Southbank Institute of Technology			QLD	
Swinburne University ELC	Swinburne College	Swinburne College	VIC	1
Sydney Institute of TAFE English Centre (SITEC)	Sydney Institute of TAFE English Centre (SITEC)	Sydney Institute of TAFE English Centre (SITEC)	NSW	1
TAFE English Language Centre Northern Sydney	TAFE NSW Northern Sydney Institute TELC		NSW	
TAFE International Education Centre, Liverpool	TAFE International Education Centre, Liverpool	TAFE International Education Centre, Liverpool	NSW	1
TAFE SA English Language Centre	TAFE SA English Language Centre		SA	
Taylor's English Language Preparation Program Waterloo			NSW	
Think Colleges Pty Ltd			NSW	
University of Newcastle Language Centre	University of Newcastle Language Centre	University of Newcastle Language Centre	NSW	1
University of Adelaide, PCE	University of Adelaide English Language Centre	University of Adelaide English Language Centre	SA	1
University of Canberra English Language Institute	University of Canberra English Language Institute (UCELI)	University of Canberra English Language Institute	ACT	1
Open Access University of Southern Queensland	University of Southern Queensland	University of Southern Queensland	QLD	1
University of Tasmania, English Language Centre	University of Tasmania English Language Centre	University of Tasmania, English Language Centre	TAS	1
UNSW Institute of Languages	UNSW Institute of Languages	UNSW Institute of Languages	NSW	1
Wollongong College Australia		UOW College	NSW	
UTS Insearch	UTS Insearch	UTS Insearch	NSW	1
UWS College	UWS College	UWS College	NSW	1
English Language Institute Victoria University	English Language Institute Victoria University	Victoria University English	VIC	1
Viva College			QLD	
58	49	49		33

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B. Global ELB Benchmark Participants

Survey results from an additional 6,166 students from the following 73 colleges from New Zealand, the USA and Canada were added to the 2013 Australia survey results to provide the Global ELB Benchmark.

ABC College of English	ICL Business School
Academic Colleges Group	ILAC Toronto
ACG Norton College	ILAC Vancouver
AIS St Helens	ILSC Toronto
Algonquin College	ILSC Vancouver
Auckland English Academy	ILSC Montreal
Auckland Goldstar Institute	International Pacific College
AUT International House	Kaplan International Colleges, Auckland
Canterbury College	Kiwi English Academy Limited
Canterbury International College	Language Schools New Zealand
CCEL	Languages International
Christchurch Polytechnic Institute of Technology	Making Futures Happen International Institute
College of New Caledonia, British Columbia	Mount Maunganui Language Centre
Communicative Language Training International	New Zealand Institute of Education
Concordia Institute of Business	New Zealand Language Centres
Crown Institute of Studies	New Zealand Management Academies
Dominion English Schools	Okanagan College
Duke Institute of Studies	Pacific College of Technology
Dynaspeak English	PEETO English College
East Coast School of Languages	Quantum Education Group
Eastwest College of Intercultural Studies	Queen's University School of English
ECN English Academy	Queens Academy of English
EDENZ Colleges	Regent International Education Group
EF International Language School	Rotorua English Language Academy
English Language Academy	Seneca College
English Language Matters	Taupo Language and Outdoor Education Centre
ELP, University of Toronto School of Continuing Studies	Taylors College & Embassy CES NZ
English Teaching College	The Campbell Institute
Fanshawe College	The Federal Institute of Studies
Fern English School	The Immigrant Services Society of BC

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Unique New Zealand	UUNZ Institute of Business
University of Missouri	VGC Language School
University of Otago Language Centre	Waikato Institute of Education
University of Ottawa	Wilkinson's English Language School
University of Saskatchewan Language Centre	Worldwide School of English
University of the Fraser Valley	York University
University of Victoria English Language Centre	

C. Summary of satisfaction elements by lowest, highest and mean score

Maximum and Minimum Range of Responses

	Aus ELB 2013	Min	Max
OVERALL ARRIVAL SATISFACTION (% SATISFIED)	91%	86%	98%
Course registration	94%	87%	100%
Meeting teachers/academic staff	93%	82%	99%
The welcome I received when I arrived at my language school	92%	81%	100%
Language school orientation	91%	84%	98%
Formal welcome at the language school	91%	83%	97%
Welcome from my homestay family	91%	82%	100%
Understanding how my course of study would work	89%	76%	95%
First night – getting to where I would stay	86%	77%	95%
Orientation (finding my way around the local area)	86%	73%	96%
Setting up a bank account	86%	71%	98%
Condition of accommodation on arrival	84%	77%	93%
Assistance to obtain health insurance	83%	64%	96%
Welcome/pickup at airport/railway/coach station	82%	68%	96%

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	Aus ELB 2013	Min	Max
OVERALL LEARNING SATISFACTION (% SATISFIED)	89%	77%	96%
Staff/teachers who are friendly and approachable	96%	91%	99%
Teachers who I can understand	95%	90%	100%
The teaching ability of teachers	93%	87%	100%
Feedback on work from teachers	92%	84%	100%
Getting time from teachers/personal support with learning when I need it	92%	85%	98%
The quality of the classrooms	92%	79%	99%
Fair and transparent assessment of my work	91%	84%	100%
The organisation and smooth running of the course	91%	79%	99%
The physical library facilities	90%	60%	100%
Studying with people from other cultures	90%	74%	98%
Learning that will help me get onto a good course	90%	78%	100%
Virtual Learning Environment (Blackboard, WebCT etc.)	90%	70%	98%
The technology (computers, networking etc.)	90%	69%	100%
The content of my course/studies	89%	83%	100%
Explanation of marking/assessment criteria	89%	84%	96%
The online library facilities	89%	66%	100%
Opportunities to practise my English language skills	88%	78%	97%
The learning resources (books etc.)	88%	66%	99%
The size of the classes	87%	64%	98%
Extra English language or study skills support classes	81%	65%	92%
Non-classroom activities to help me learn English	78%	66%	93%

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	Aus ELB 2013	Min	Max
OVERALL LIVING SATISFACTION (% SATISFIED)	90%	79%	100%
The quality of the external campus environment	94%	77%	100%
The surroundings outside the language school	94%	85%	100%
The language school's eco-friendly attitude to the environment	94%	76%	100%
The design & quality of the campus buildings	93%	65%	100%
Making friends from my home country	92%	79%	97%
Making friends from other countries	91%	80%	98%
Feeling safe and secure	91%	77%	100%
The facilities for religious worship (prayer room etc.)	90%	74%	97%
Opportunities to experience the culture of this country	87%	75%	98%
Immigration & visa advice from the language school	87%	74%	97%
The social facilities (common room etc.)	87%	67%	95%
Feeling welcome in this country	86%	74%	98%
The quality of accommodation	86%	74%	96%
Making good contacts for the future	86%	75%	97%
Access to suitable accommodation	85%	76%	100%
The social activities (organised events or trips)	85%	64%	100%
The sports facilities	83%	62%	98%
The transport links to other places	80%	56%	94%
The weather	79%	49%	100%
Internet access at my accommodation	73%	60%	88%
Making friends from this country	73%	53%	95%
The availability of financial support/bursaries etc.	61%	39%	86%
The opportunity to earn money while studying	58%	43%	86%
The cost of accommodation	56%	41%	85%
The cost of living (food, drink, transport and social)	54%	36%	83%

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	Aus ELB 2013	Min	Max
OVERALL SUPPORT/ADVICE SATISFACTION (% SATISFIED)			
Help & support with my visa application	89%	82%	98%
Advice provided by my language school before travelling	87%	75%	96%
Social program organisation	86%	73%	99%
Advice on further study following my English course	85%	71%	100%
Handling a complaint	84%	65%	96%
Time taken by my language school to respond to my initial contact	83%	69%	93%
Accommodation placement service	82%	63%	94%
Advice on finding medical care or counselling services	82%	65%	96%
Time taken by my language school to send my offer after my application	80%	65%	96%
Advice on employment/career options following my course	78%	57%	94%
Advice & guidance on finding part-time work while in this country	72%	52%	94%

	Aus ELB 2013	Min	Max
REFLECTIONS ON EXPERIENCE (% AGREE WITH STATEMENT)			
I have made progress in learning English since beginning this course of study	91%	84%	96%
I feel that my English language course has been worth the investment of time	83%	70%	93%
Studying English in this country has been better than I expected	81%	68%	94%
The language school experience has lived up to my expectations	80%	69%	94%
My course of study has been worth the investment of money	75%	61%	86%
I feel that my English language course offers value for money	73%	54%	85%
<i>I feel isolated from the language school community</i>	35%	16%	66%

	Aus ELB 2013	Min	Max
OVERALL SATISFACTION (% SATISFIED)			
RECOMMEND SCHOOL (% RECOMMEND)	82%	66%	94%
RECOMMEND THIS COUNTRY (% RECOMMEND)	87%	74%	98%

D. About English Australia

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

English Australia represents over 120 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.

As an association, English Australia has a focus on:

- representing member colleges whose core business is English language teaching;
- delivering best practice support and expertise to member colleges; and
- providing the English language sector with global visionary leadership.

For more information visit:

www.englishaustralia.com.au