

How can the Canadian language sector benefit from a national student satisfaction survey?

*Languages Canada
Conference*

Sue Blundell
English Australia

2 March 2015



- About English Australia
- Profile of the English language sector & international education in Australia
- What is the ELT Barometer?
- Why did English Australia pursue this initiative?
- What have been the outputs?
- What have been the benefits?
 - government
 - participating language schools/centres
 - English Australia
 - the English language sector

- English Australia
- the English language sector
- international education



- national ‘peak body’ for English language colleges in Australia
- founded in 1983 as the ‘ELICOS Association’
(English Language Intensive Courses for Overseas Students)
- founded by and for both **private and public** ELICOS colleges
- incorporated in 1990 & then re-branded as **English Australia** in 1999
- key activities
 - providing strong leadership to the ELICOS industry
 - supporting a strong ELICOS ‘community’ – networking & information
 - government advocacy – influencing key policy areas
 - supporting quality teaching and support services
 - promoting member colleges

- influencing the development & implementation of government policy in key areas
- what?
 - **visas** – Department of Immigration – member of government/industry committee that meets 4 times a year; consulted on all changes
 - **regulation** – Department of Education – 4 meetings a year with ELICOS regulators; consulted on all changes
 - **promotion** – Austrade – regular engagement & development of joint promotional activities

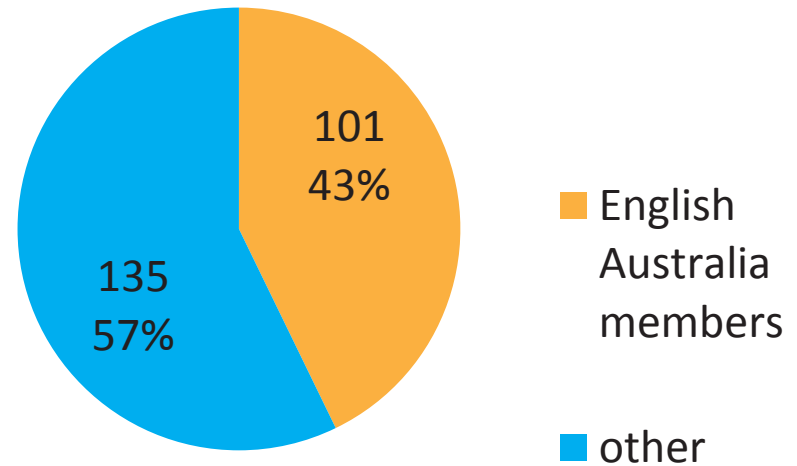
- English Australia supports and promotes quality English language training and associated services **for the English language sector in Australia** through:
 - national industry conference - the **English Australia Conference**
 - professional TESOL journal published biannually - the **English Australia Journal**
 - annual program of **professional development seminars/workshops** delivered in each state/territory
 - a funded **action research program** to encourage classroom based research
 - a program of **Awards** recognising contributions to the sector
 - **national student satisfaction survey** to identify sector wide focus for improvement
 - close liaison with accrediting and registering bodies

- English Australia supports and promotes quality English language training and associated services **for member colleges** through:
 - **Membership Criteria** – applicants for English Australia membership must meet strict entry criteria;
 - **Code of Conduct**;
 - **Disciplinary Procedures** for dealing with complaints against member colleges;
 - a **Tuition Assurance Scheme** (TAS) that protects ELICOS students on visas other than a student visa;
 - **Guides to Best Practice in ELICOS**;
 - discounted rates to encourage attendance at Professional Development events, including the national English Australia Conference and state/territory branch organised activities.

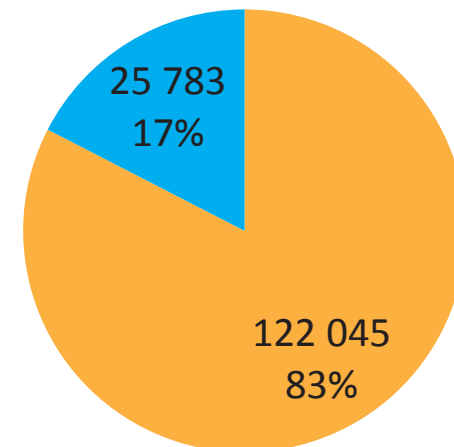
- promoting member colleges
 - branding & marketing strategy
 - agent engagement strategy
 - *Partner Agency Program*
- protecting students (and agents)
 - tuition assurance built into legislation for all student visa holders
 - English Australia also provides tuition assurance for non-student visa holders studying with English Australia member colleges
 - English Australia mediates any issues between agents/students/parents & member colleges

- 236 registered English language colleges
(all colleges must be registered)
- 101 colleges are members of English Australia (123 locations)
- **43%** of colleges with English programs are members
- **83%** of international students taking English courses study with a member college

colleges



students



- in 2013 there were **410,925** international students **from 193 countries** in Australia studying on a student visa
- **2014 data** for student visa holders shows an increase in new student commencements of **+17%**
- this compares with an average annual growth rate for commencements of 6.2% per year over the preceding ten years
- **Aus\$15.7 billion** in export revenue in 2013/2014
- education = Australia's largest services export - **#4** overall export after iron ore, coal and natural gas

- **140** nationalities
- **147,828** students
- **1,912,013** student weeks
- **12.9 weeks** average course length
- **Aus\$12,484** expenditure per student
- **Aus\$1.845 billion** export earnings

- primary segmentation of student profile is by visa type
- 39% on all visas study English as a pathway into other sectors
- 61% on all visas study 'stand-alone' English

- the ELT Barometer – why?
- the ELT Barometer – what?
- findings in 2009 / 2011 / 2013



- earlier slide on *Supporting quality teaching & support* services identified the following as a key initiative under this heading
 - **national student satisfaction survey** to identify sector wide focus for improvement
- not the only rationale.....
- also important for:
 - ELICOS sector credibility with the government
 - English Australia's relationship with the government
 - to contribute to returning the industry to growth
- WHY?

Context 2009/2010 – ‘the perfect storm’

Sector faces perfect storm

THE AUSTRALIAN | JULY 28, 2010 12:00AM



SAVE



[Andrew Trounson](#)

Higher Education Reporter
Melbourne

\$3bn hit to economy as foreign students slump

UNIVERSITIES Australia yesterday warned that the sector faces a "perfect storm" of factors threatening vital international student revenue next year.

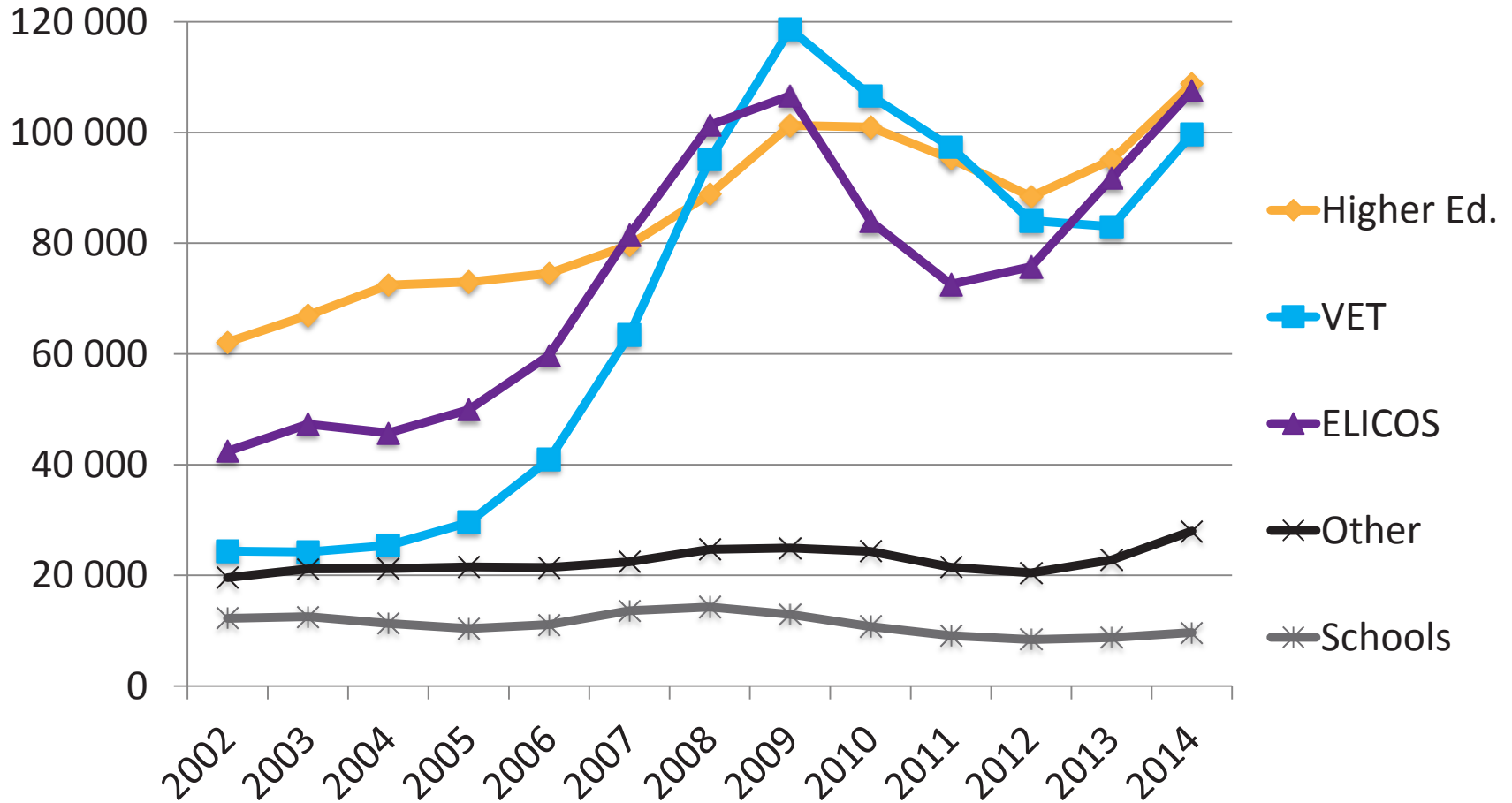


[ABC Online](#)

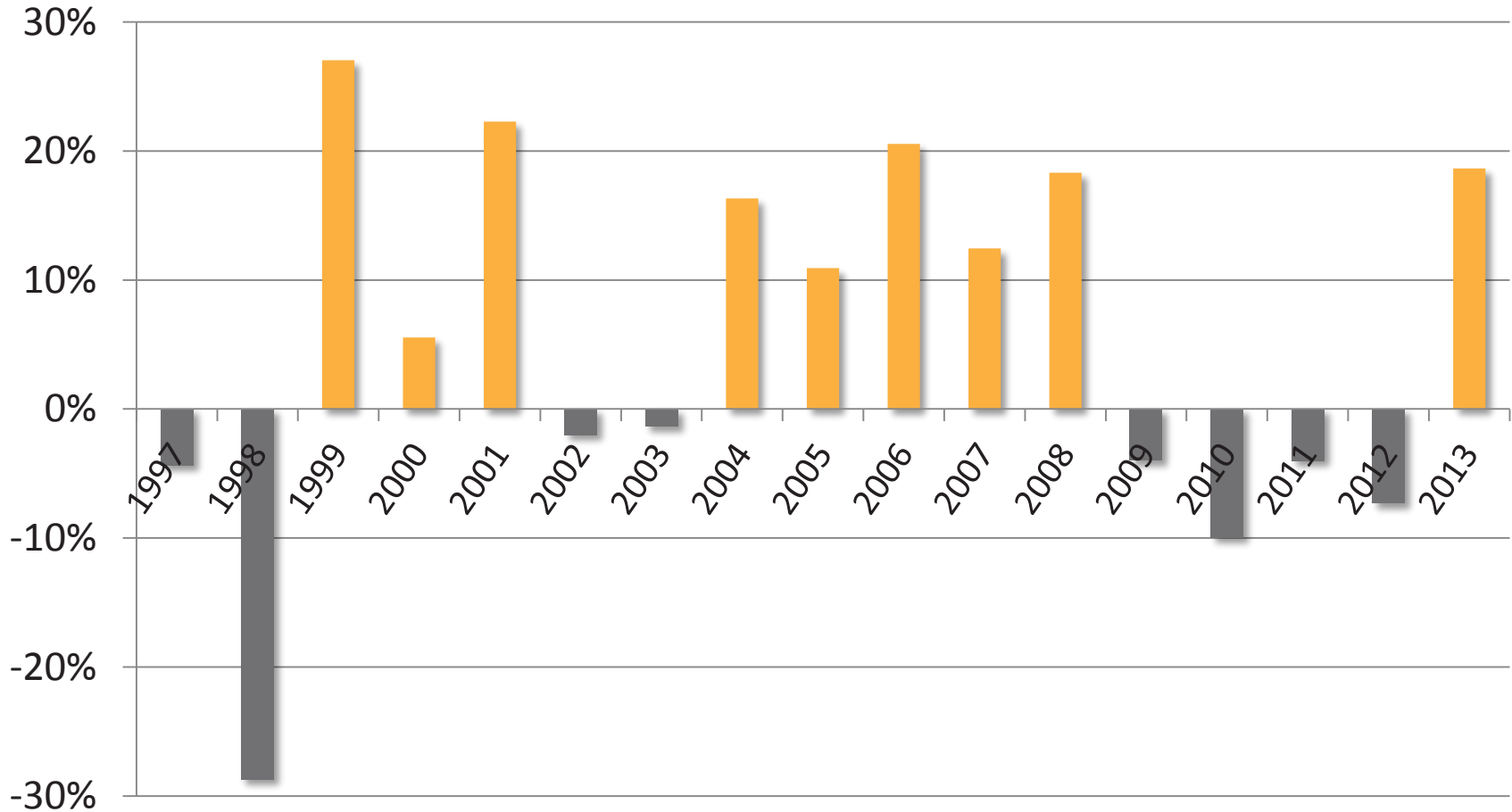
PM - Government warning to colleges exploiting overseas students

- Global Financial Crisis (GFC)
- **strong Australian \$**
- the US and UK step up
- visa and migration policy
- **student safety/college closures : reputation**

Commencements of student visa holders



ELICOS in Australia – % growth or decline





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International Students Strategy for Australia

Friday, 29 October 2010

Download file:

-  [International Students Strategy for Australia \(RTF\)](#)
-  [International Students Strategy for Australia \(PDF\)](#)

COAG has now endorsed the International Students Strategy for Australia. The Strategy aims to support a high quality experience for international students by improving student wellbeing, assuring the quality of education, strengthening consumer protection for international students and providing better information to current and future students. It builds on efforts already undertaken at all levels of government to improve the safety and wellbeing of international students.

7. How will we know that things have changed for international students?

As part of the Strategy, an international student survey is taking place in 2010 and 2012 to better understand international students' experience of living and studying in Australia. The survey will examine why they chose to study in Australia, level of satisfaction with their education, support services, engagement with the local community, and the general experience of living in Australia.

It will also examine international students' future plans and aspirations.

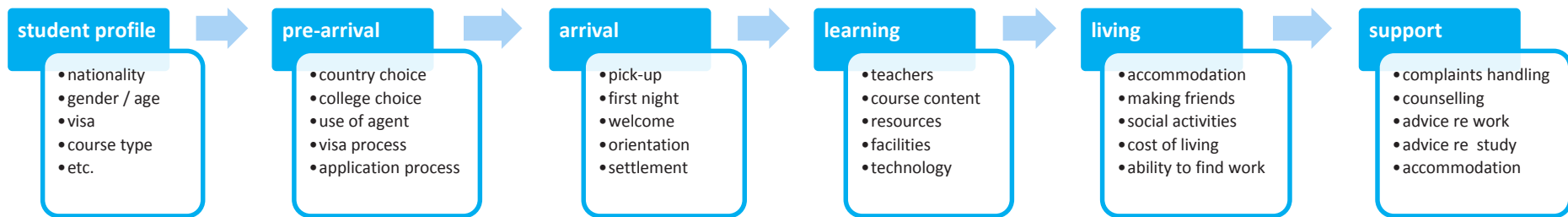
The findings of each survey will help inform reporting and future policy making for international students.

- student feedback is important to the ELICOS sector for many reasons:
 - continuous improvement, lobbying, reputation, promotion
- the ELT Barometer provides:
 - a better understanding for individual participating colleges of the experience of international students so they can take strategic action
 - a platform on which to share best practice and raise the quality of the student experience across the sector
 - students with a voice and ensures their concerns and requirements are being met across key elements of the student experience
 - the opportunity to benchmark the Australian experience against a similar cohort of students internationally and against other sectors in Australia
 - a mechanism to understand better the student decision-making process to inform future marketing strategies for individual colleges and the sector
 - evidence that supports English Australia’s statements about the quality of the English language – to government and to markets

- Australian Government Department of Education
 - provided support funding; interested in meeting their goals relating to student satisfaction
- English Australia
 - managed project; engaged ELICOS colleges in the project; promoted outcomes; developed a sector-wide strategy to take action relating to outcomes
- i-graduate
 - ran the survey; provided expertise & international tool; ensured confidentiality; provided reports & comparative benchmarks
- ELICOS colleges
 - matched government support funding; engaged their students; developed their own strategies to take action relating to outcomes; shared good practice with other colleges

- i-graduate has tracked and reported feedback from over 500,000 international students in educational sectors from more than 200 countries since 2005
- the tool they have developed, the International Student Barometer (ISB), is an independent & confidential feedback process for education providers, tracking the decision-making, perceptions, expectations & experiences of students studying outside their home country
- in 2009, Australian English language providers committed to giving students a voice using a confidential, independent feedback process **within the international student barometer methodology**

- core questionnaire areas of focus

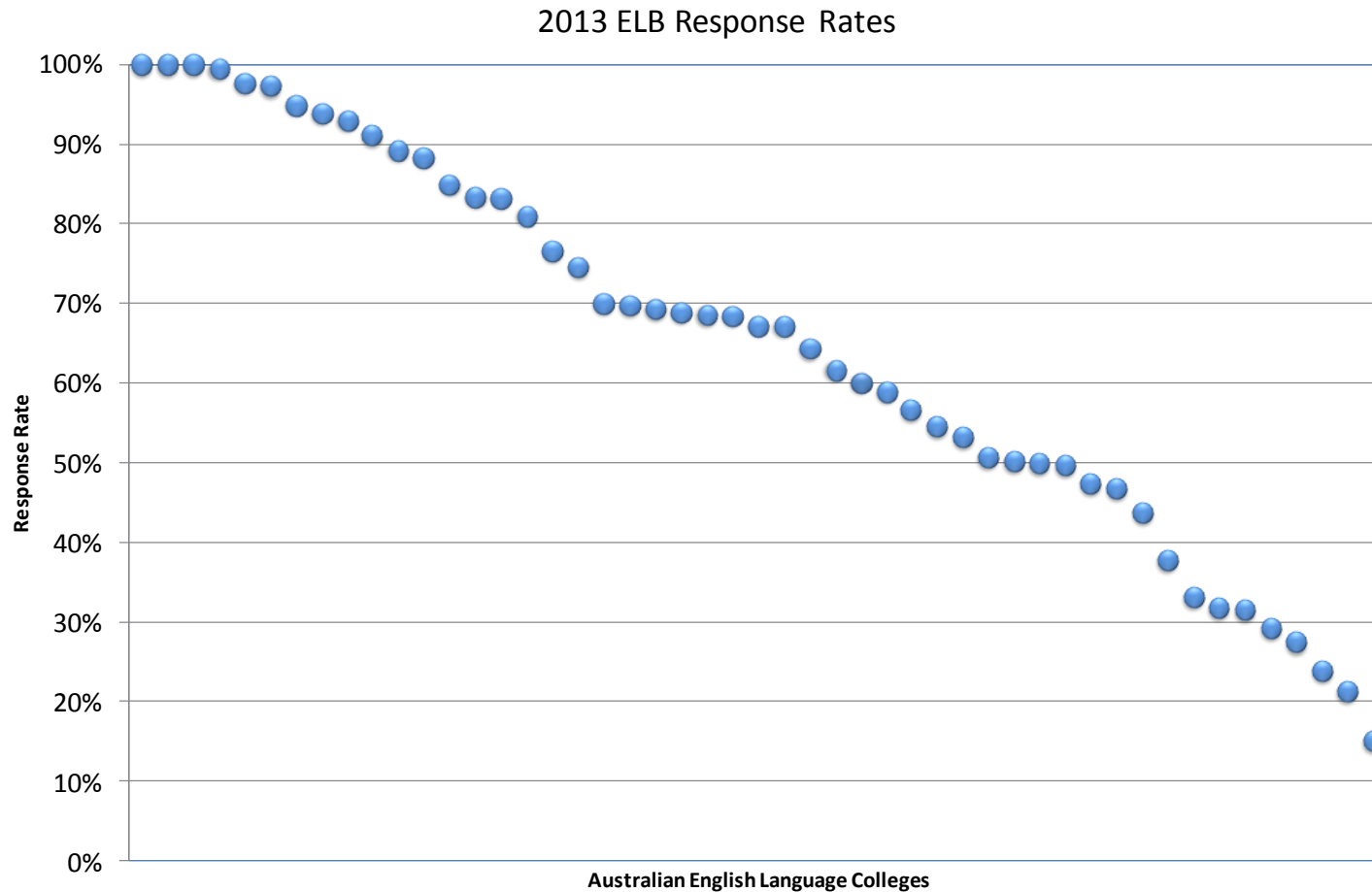


- semi-standardised online questionnaire format, adapted and customised for the Australian English Language sector
- sector results compared against comparator benchmark and previous years
- questionnaire available in 11 languages: Arabic, Chinese simplified, Chinese traditional, English, Italian, Japanese, Korean, Portuguese (Brazil), Spanish, Thai, Vietnamese

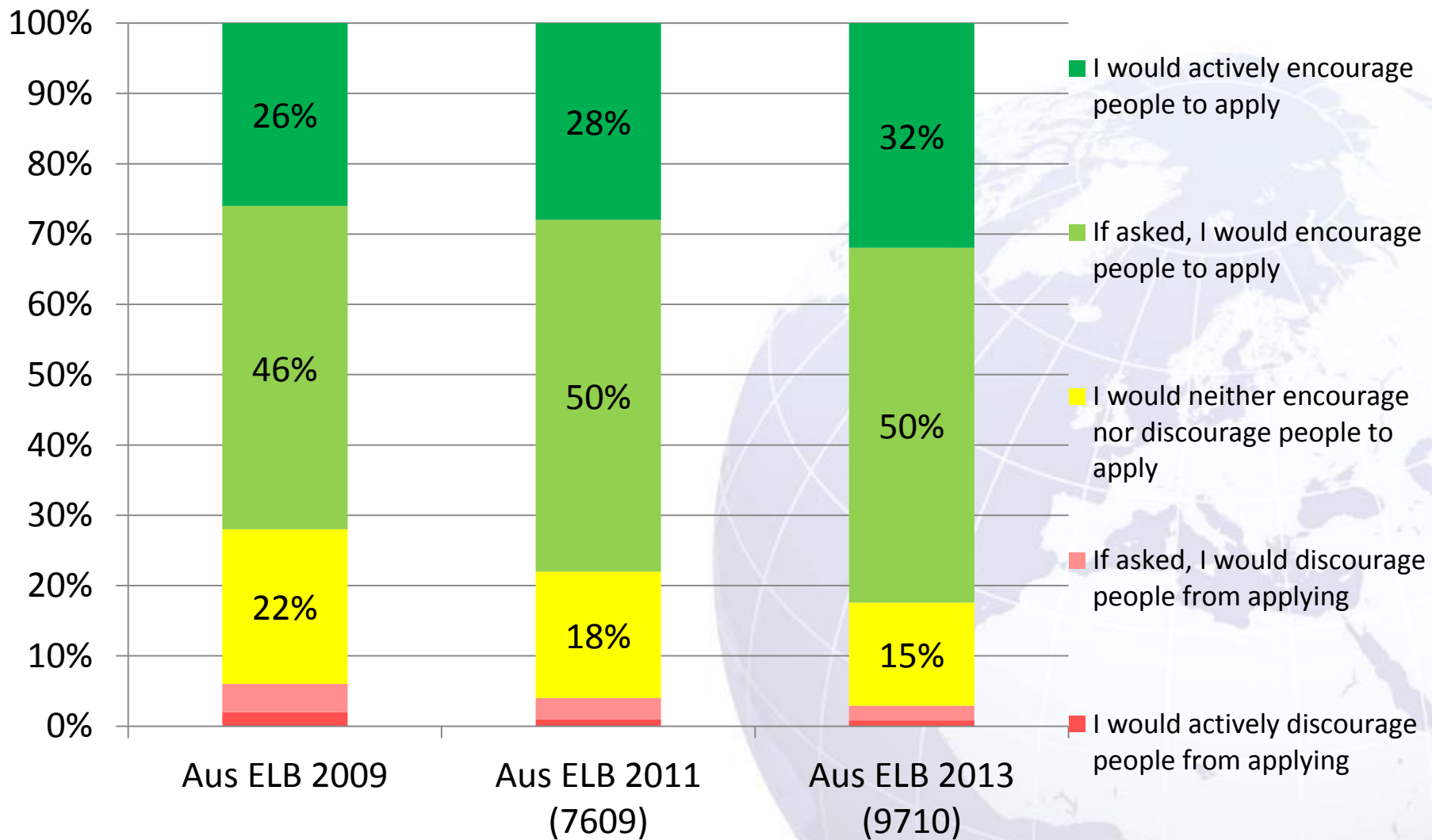
Representativeness of sample

	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%	-

2013 ELB response rates by college



Propensity to recommend – wave on wave comparison



Would you recommend your language school/centre to others thinking of applying here?

Topline results – satisfaction

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

Reflections – wave on wave comparison

	Aus ELB 2009	Aus ELB 2011	Aus ELB 2013
% agree			
I have made progress in learning English since beginning this course of study	91%	94%	91%
I feel that my English language course offers value for money	72%	78%	75%
Studying English in this country has been better than I expected	69%	77%	81%
<i>Base</i>	8234	7196	9557

- **benefits to providers**
- **benefits to English Australia**
- **benefits to the sector**



- evidence based knowledge on elements of the student experience directly from the students to inform national policy
- identifiable benchmarks both nationally and internationally to assess and verify areas which require further investigation and support at a national level
- sector specific knowledge on the student experience in both private and public providers
- a mechanism for ELICOS providers to fully understand the experience of their students and inform practice – assisting the government to facilitate change at a grass roots level and ultimately address the strategic issues facing the government
- through joint funding of the project, ELICOS providers feel supported by government and encouraged to address the changes that are required to enhance the student experience

- an independent research instrument for regular monitoring and evaluating of the student experience within their own institution
- a snapshot of areas of strengths and weaknesses to inform policy and practice
- valuable marketing intelligence on aspects of the decision-making process of current students to inform marketing strategies and remain competitive
- encouraged to think outside of their current environment, gauging themselves against others in the sector and providing a channel for the sharing of best practice on common issues
- can benchmark their student satisfaction levels against competitors in Australia
- can understand where students place their priorities
- can identify where they can invest their resources to make a difference
- can promote their strengths
- can address their weaknesses

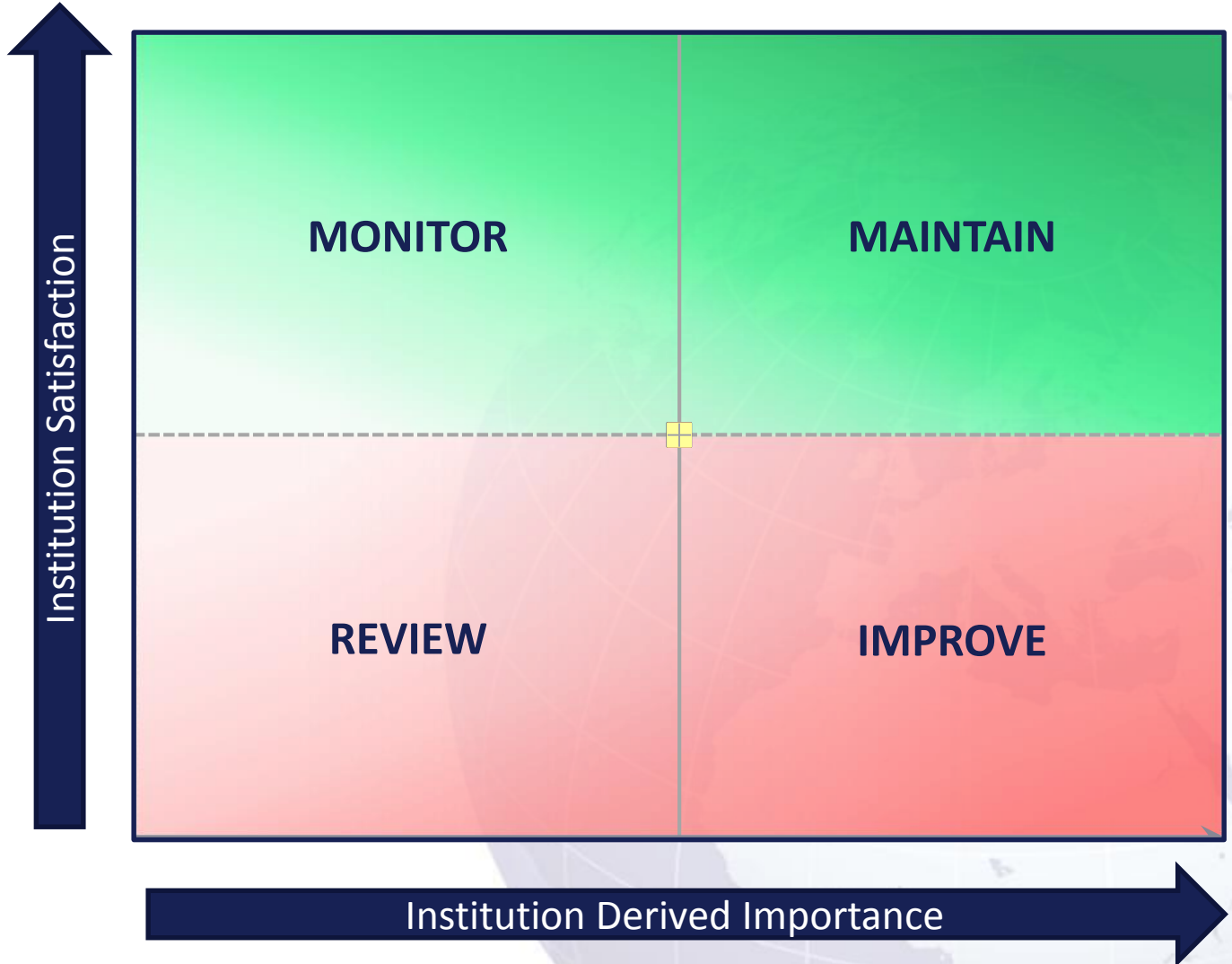
Sample ranking sheet – Institution X

	Institution X	Global ELB %	Australia ELB %	Global ELB +/-	Australia ELB +/-	RANKING Australia ELB
LIVING AVERAGE	81.8%	81.9%	82.7%	-0.1%	-0.9%	29
LIVING OVERALL	90.3%	90.1%	92.3%	0.1%	-2.1%	40
Campus buildings	96.5%	90.5%	92.0%	6.0%	4.5%	30
Campus environment	95.9%	89.7%	90.9%	6.2%	5.0%	35
Eco-friendly attitude	94.4%	83.4%	83.9%	11.0%	10.5%	28
Worship facilities	93.8%	89.5%	89.6%	4.3%	4.2%	19
Other friends	93.3%	86.8%	88.3%	6.5%	5.0%	35
Host culture	91.2%	88.0%	89.0%	3.1%	2.1%	8
Good contacts	91.2%	86.5%	87.6%	4.7%	3.6%	9
Home friends	90.7%	85.2%	86.7%	5.5%	4.0%	31
Accommodation quality	91.2%	85.6%	86.4%	5.6%	4.8%	21
Good place to be	90.8%	92.8%	93.8%	-2.0%	-3.0%	44
Accommodation access	90.4%	85.5%	86.4%	4.8%	4.0%	14
Social facilities	89.9%	86.3%	86.3%	3.6%	3.5%	26
Visa advice	89.6%	86.8%	86.6%	2.8%	2.9%	29
Feeling welcome	88.2%	86.5%	86.0%	1.7%	2.2%	32
Safety	87.4%	90.8%	91.0%	-3.3%	-3.5%	43
Social activities	85.0%	84.4%	84.3%	0.6%	0.7%	31
Transport links	84.9%	75.6%	80.9%	9.2%	4.0%	20
Host friends	83.5%	71.0%	73.3%	12.5%	10.2%	7

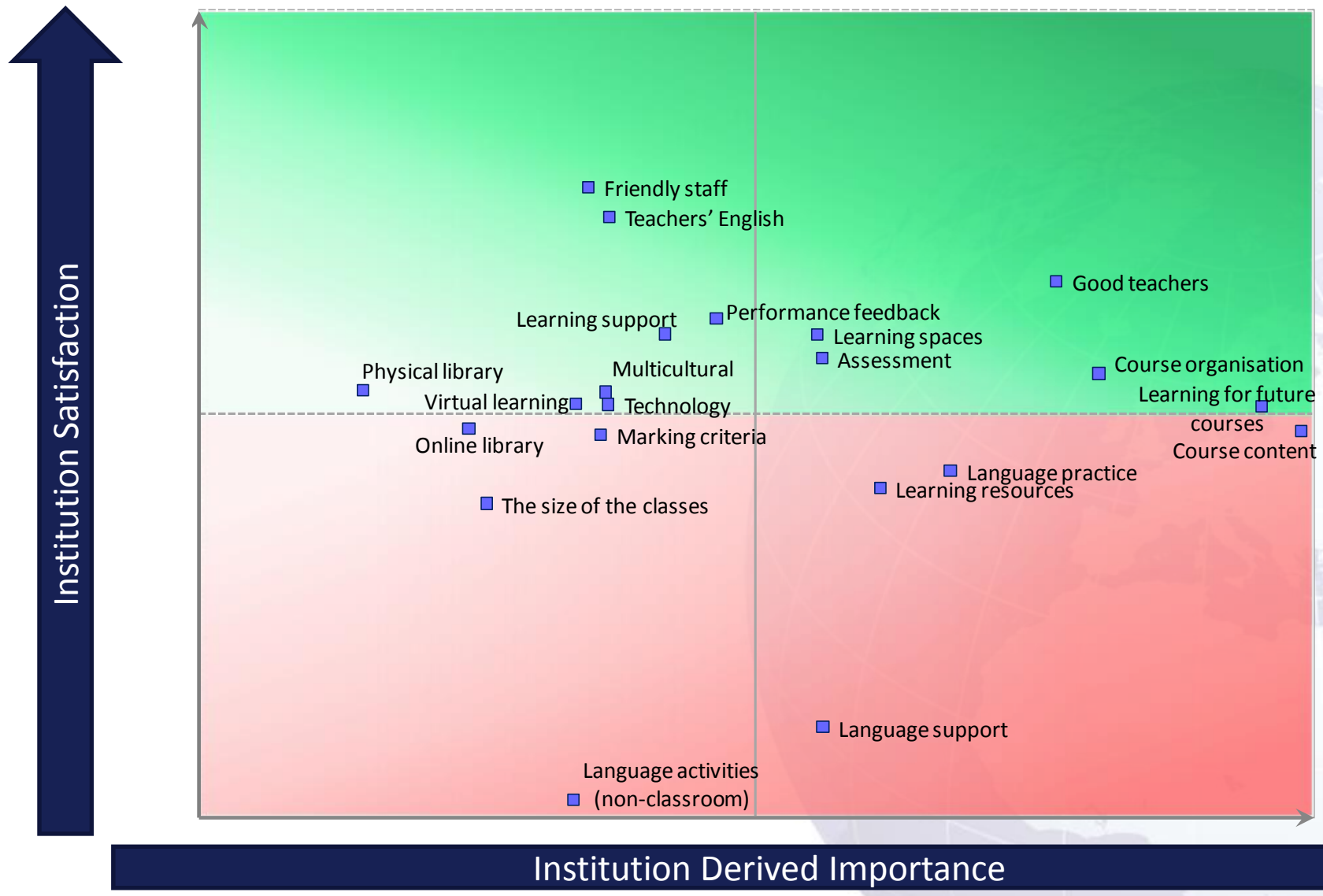
Learning matrix

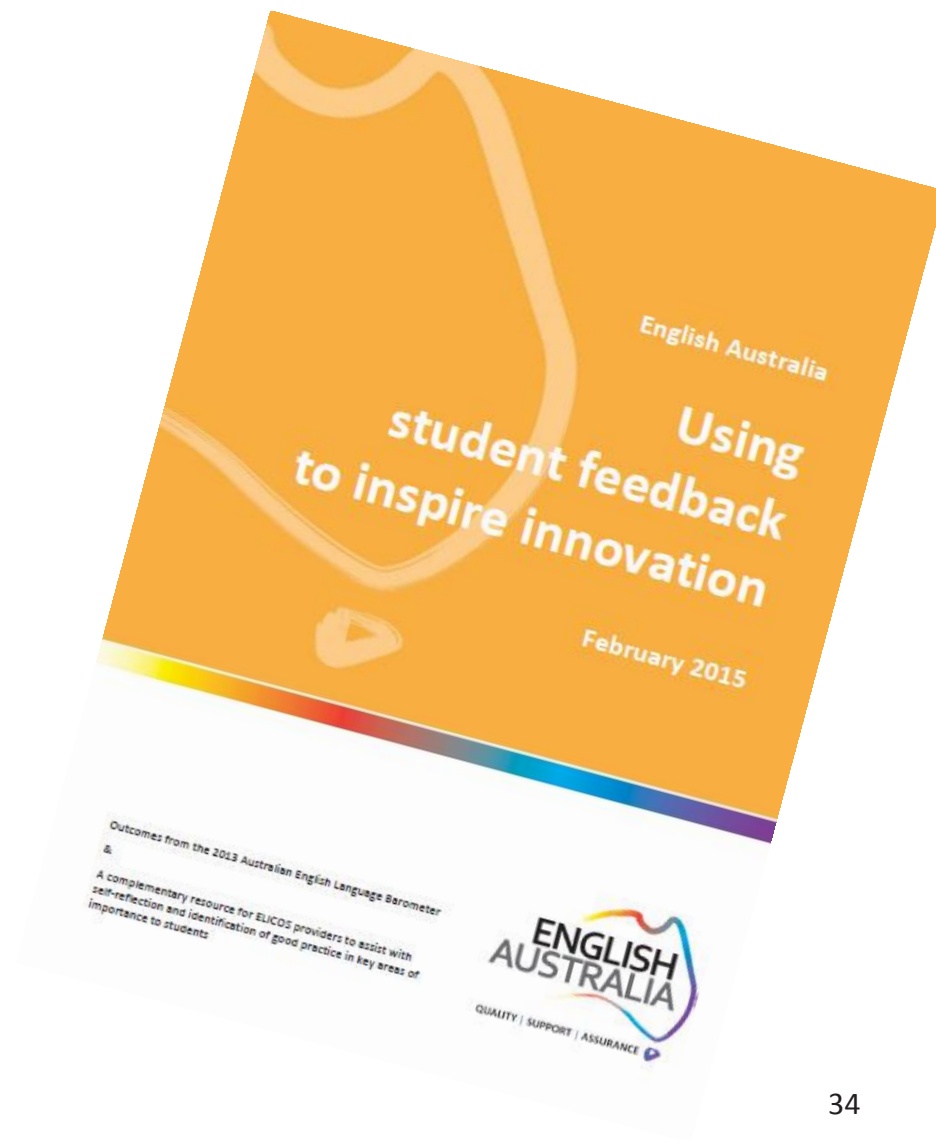
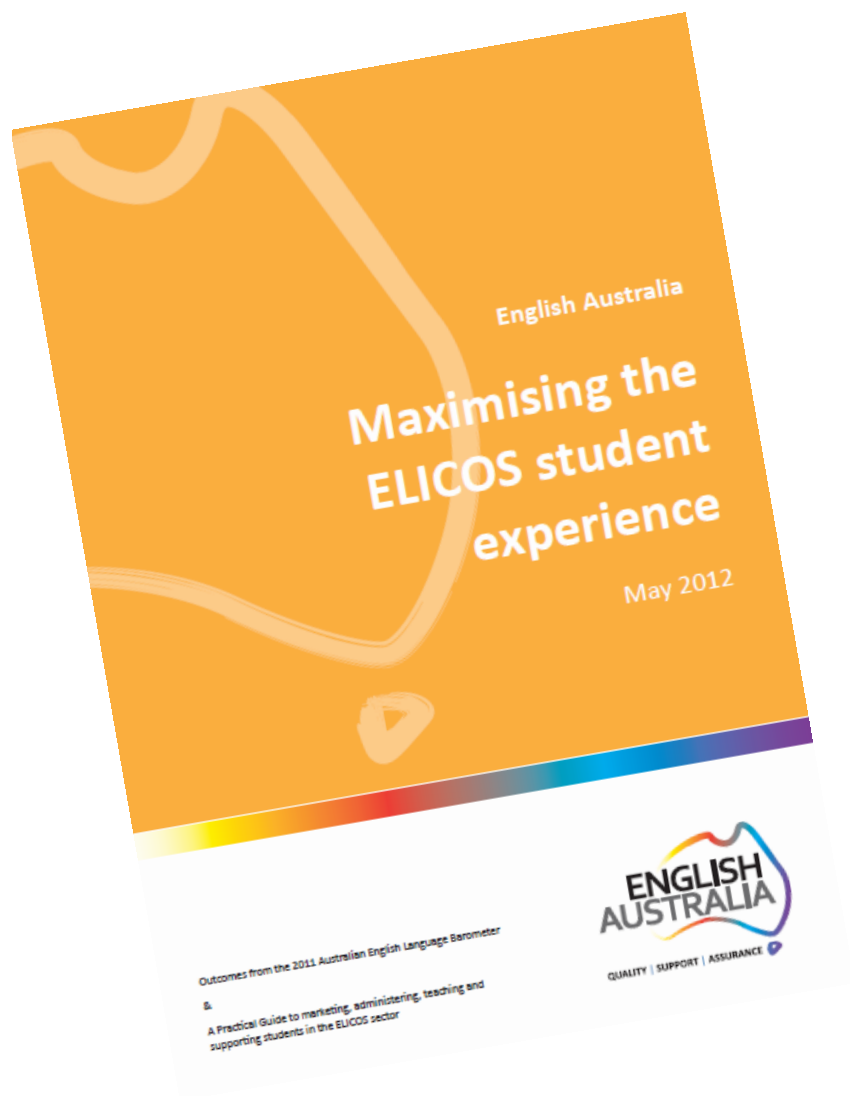
Elements in the top right quadrant are important to students and perform well. Those in the bottom right quadrant are important, but do not perform as well and should be improved.

Elements in the top and bottom left quadrants are of lower priority. These elements should be reviewed and monitored to ensure that we focus on the most important issues for students.



Learning matrix





- Sample section from report & resource:

Outcomes from the 2011 Australian English Language Barometer

&

A Practical Guide to Marketing, Administering, Teaching and Supporting ELICOS Students

7.1.1. Pre-departure Services

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

Best Practice Checklist

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

Tools and Resources

The following tools and resources are provided in Part 3 of this report.

- Pre-departure Handbook Sample Contents

Reference

Reference / More Info	Source / Publisher
Orientation & Pre-Arrival Handbook - The Rainbow Guide http://www.isana.org.au/index.php?option=com_content&task=view&id=246	ISANA
Guide to Best Practice in Providing Student Support Service in ELICOS	English Australia - Members Only
Good Practice Principles for English language proficiency for international student in Australian Universities (2008)	DEEWR
Principles of good practice for enhancing international student experience outside the classroom.	ISANA

Professional sharing of good practice

THE MOST ATTRACTIVE COUPLE IN NEWCASTLE Australia

LANGUAGE CENTRE STUDENT EXPERIENCE PROGRAM

UNIVERSITY OF NEWCASTLE

i-graduate
INTERNATIONAL INSIGHT

Using the ELT Barometer to drive increases in student satisfaction

*Sue Blundell
Kevin Brett
Dianne McKeagney*

Student Engagement in ELICOS: Management, Marketing and Classroom perspectives

Rachel Mackie

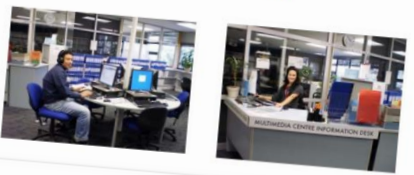
ENGLISH AUSTRALIA
QUALITY | SUPPORT | ASSURANCE

SWINBURNE
SWINBURNE UNIVERSITY OF TECHNOLOGY

Swinburne
think forward

Language support outside the classroom

- Support classes and teacher consultation
- One-on-one language support
- Conversation classes
- Pronunciation classes
- UOW Buddies program



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08000 Poulder No. 001246

Global Communicators Timetable
Go to the session that suits you best
Sessions begin in week 2 until week 12

Session	Days	Time	Location
Pre-orientation 1	Friday	10:00-12:00	Level 1, 100 Victoria St
Pre-orientation 2	Friday	13:00-15:00	Level 1, 100 Victoria St
Pre-orientation 3	Friday	16:00-18:00	Level 1, 100 Victoria St
Pre-orientation 4	Friday	19:00-21:00	Level 1, 100 Victoria St
Pre-orientation 5	Friday	22:00-24:00	Level 1, 100 Victoria St
Pre-orientation 6	Friday	00:00-02:00	Level 1, 100 Victoria St
Pre-orientation 7	Friday	03:00-05:00	Level 1, 100 Victoria St
Pre-orientation 8	Friday	06:00-08:00	Level 1, 100 Victoria St
Pre-orientation 9	Friday	09:00-11:00	Level 1, 100 Victoria St
Pre-orientation 10	Friday	12:00-14:00	Level 1, 100 Victoria St
Pre-orientation 11	Friday	15:00-17:00	Level 1, 100 Victoria St
Pre-orientation 12	Friday	18:00-20:00	Level 1, 100 Victoria St
Pre-orientation 13	Friday	21:00-23:00	Level 1, 100 Victoria St
Pre-orientation 14	Friday	00:00-02:00	Level 1, 100 Victoria St
Pre-orientation 15	Friday	03:00-05:00	Level 1, 100 Victoria St
Pre-orientation 16	Friday	06:00-08:00	Level 1, 100 Victoria St
Pre-orientation 17	Friday	09:00-11:00	Level 1, 100 Victoria St
Pre-orientation 18	Friday	12:00-14:00	Level 1, 100 Victoria St
Pre-orientation 19	Friday	15:00-17:00	Level 1, 100 Victoria St
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Pre-orientation 21	Friday	21:00-23:00	Level 1, 100 Victoria St
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Each session runs for one hour. By attending regularly you can gain additional support from our staff.

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ICP office 08 0000

www.uowcollege.edu.au

Key Focus Areas

1. Ongoing Orientation
2. Supportive Social Networks
3. Employment Assistance
4. Health & Well Being
5. Finance & Budgeting



2013 English Language Barometer



- More than 10 000 students from 49 Australian institutions took the survey. More than half of our ELICOS student body completed the online survey.
- 1st among surveyed Australian Institutions (average all elements) and 2nd among surveyed Australian Institutions (overall question)- UOWC students ranked their **Support experience** at the College.
- 1st among surveyed Australian Institutions (average all elements) and 4th among surveyed Australian Institutions (overall question)- UOWC students ranked their **Arrival experience** at the College.

www.uowcollege.edu.au

5 July 2012

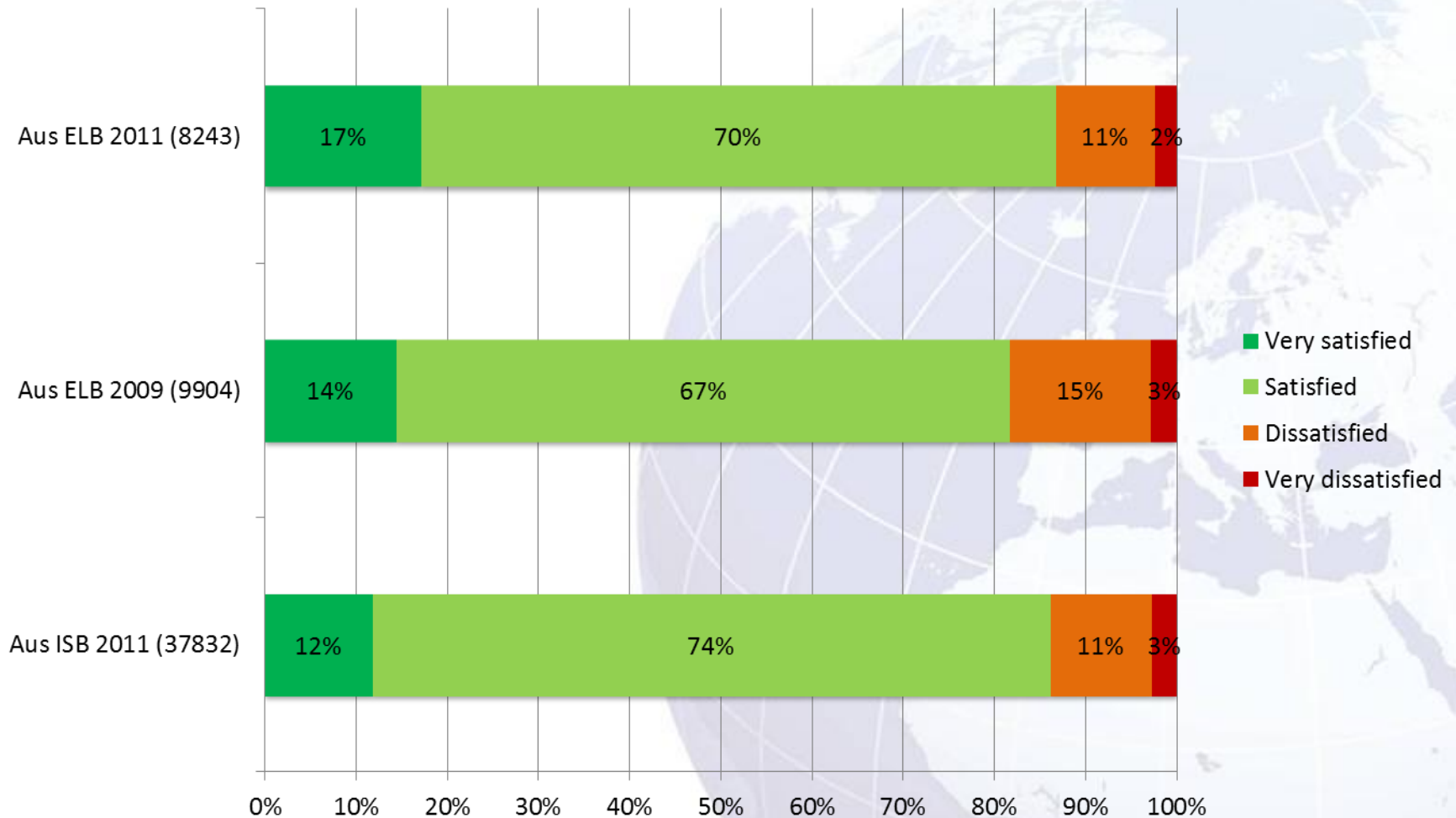


International students in Australia recommend Navitas as leading educator

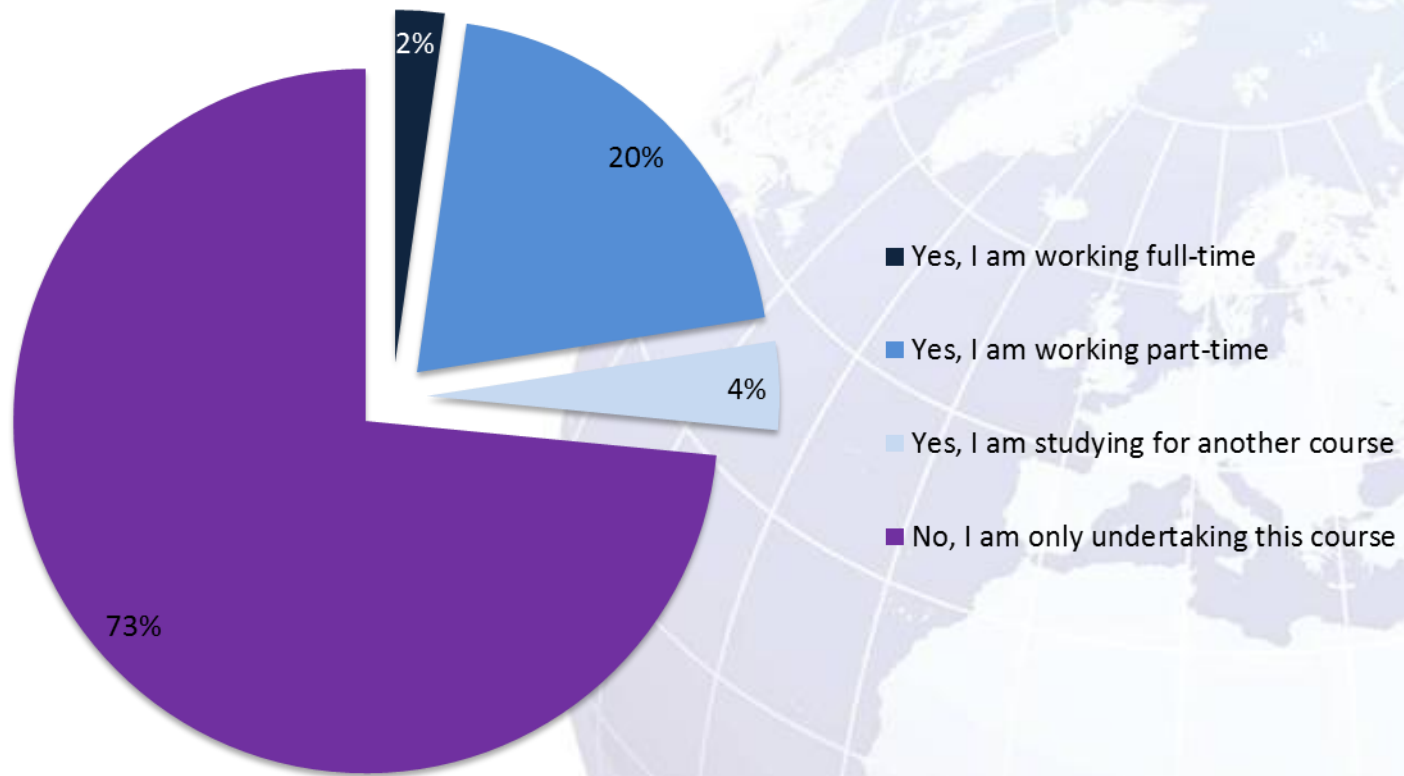
Navitas English ELICOS and TESOL Programs (ETP) centres recently received outstanding results in an independent survey of nearly 9,000 international students studying at 49 Australian ELICOS institutions.

- evidence based data to identify professional development activities/services to support English Australia member colleges in enhancing the student experience
- data on the student decision-making process and key competitors to assist in the promotion of Australia as one of the leading providers of high quality English language intensive programs
- sector wide data to gauge current issues and future concerns which might impact the ELICOS sector as a whole and assist in developing robust strategies to manage these concerns
- relationship with government
 - seen as valued partner
 - contributing to government agenda/goals
 - reputation for representing quality colleges
 - strong evidence base for advocacy purposes eg. work rights
- value proposition for members - member retention

Overall, how satisfied are you with the English Language course you are currently studying?

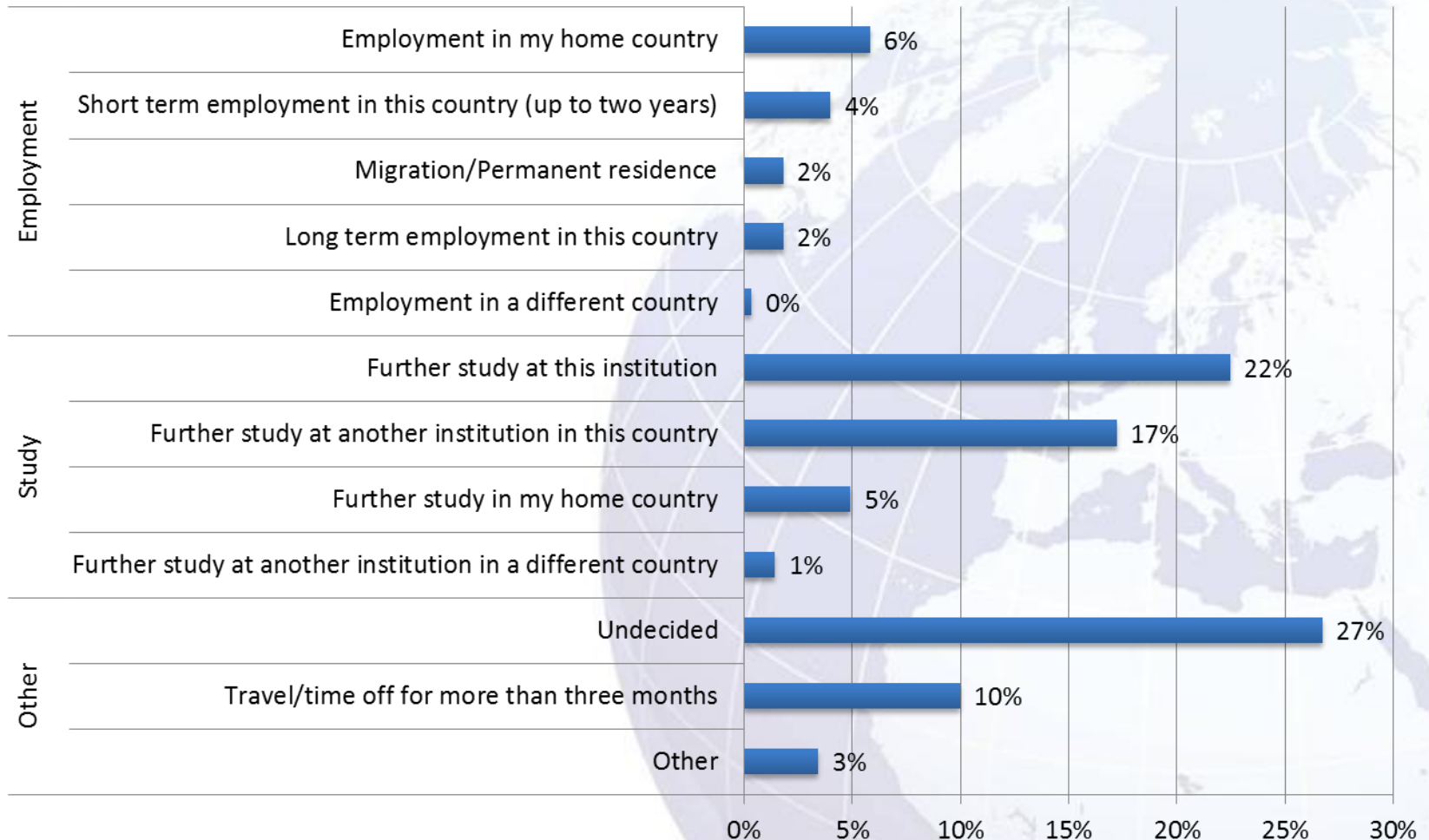


Are you working or studying in addition to studying for your English language course? (n=8222)



RESPONSE → DESTINATION → APPLICATION → EXPECTATIONS → OVERALL → LEARNING → LIVING → SUPPORT → RECOMMENDATION

What do you plan to do after your current course of study? (n=7573)



The ELICOS canary: not dead just pining

THE AUSTRALIAN | JUNE 27, 2011 10:57AM



SAVE



John Ross

Higher Education Reporter
Sydney

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When English Australia (EA) executive director Sue Blundell briefs her members on how the English language sector is tracking, she usually finishes her annual presentations with an image of a canary. It's a reference to ELICOS's canary-in-the-coalmine role as an early indicator of broader problems in international education. This year, the image was a dead parrot - a reference to the Monty Python sketch, in which a pet retailer assures a customer the bird he just bought hasn't carked it. The ELICOS industry, with 140,000 students and generating \$1.6 billion in export earnings hasn't carked it, but the vital signs aren't encouraging.



Sue Blundell, executive director of English Australia, says the dollar had stimulated enrolment growth from safe traditional markets in East Asia and Europe. Picture: James Croucher
Source: The Australian

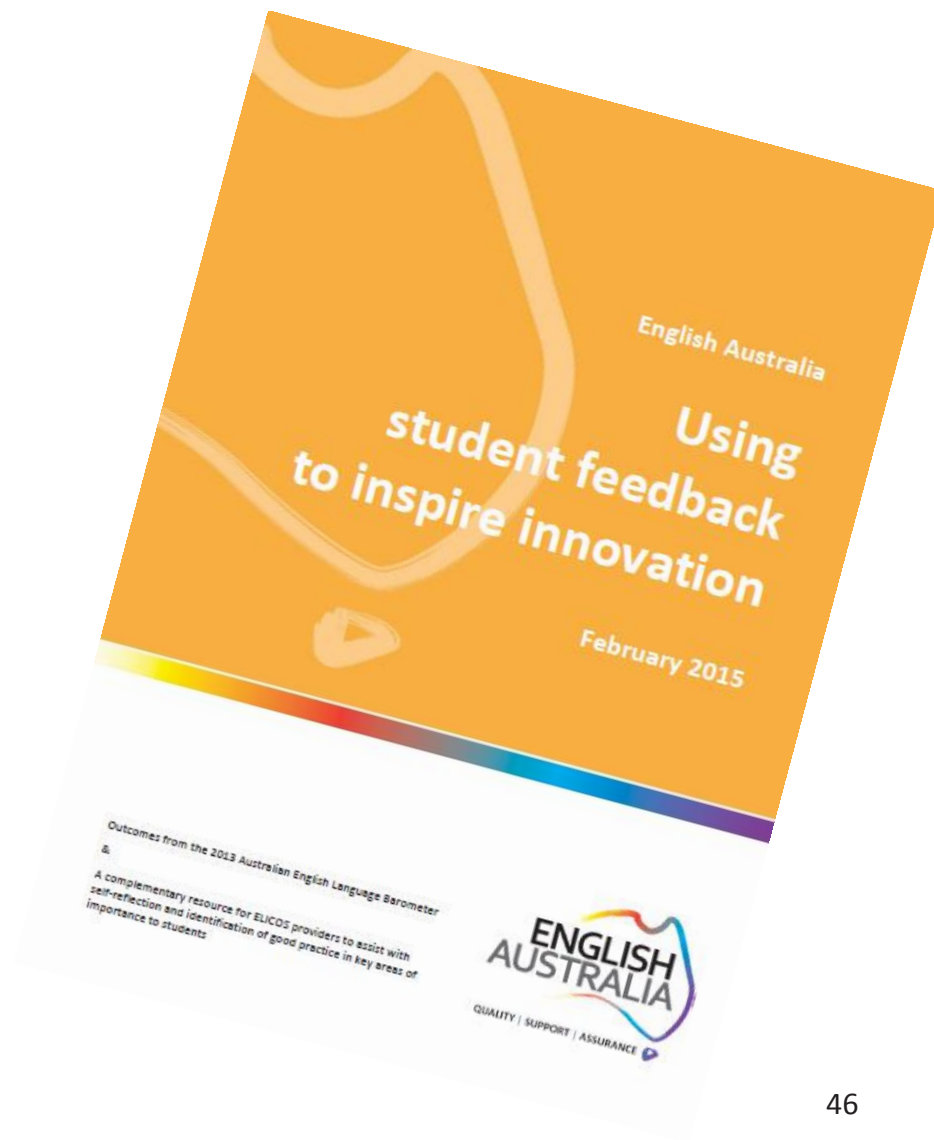
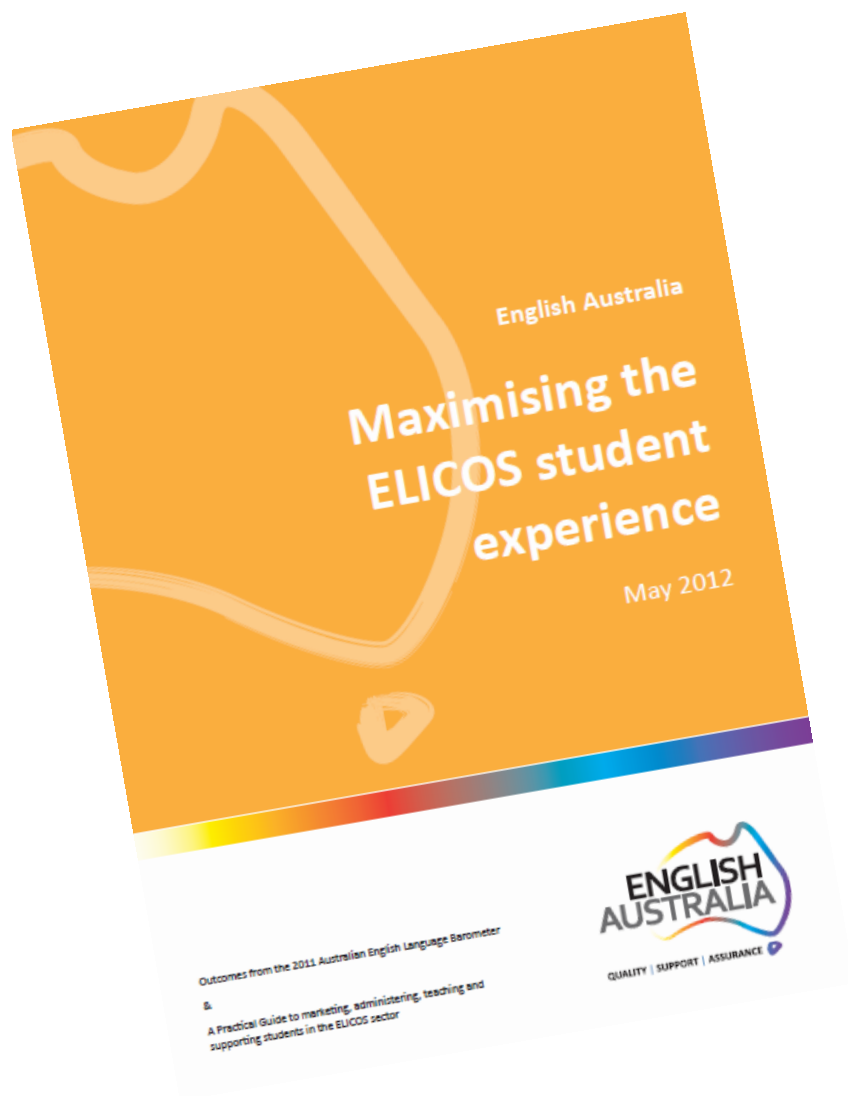
- reputation with government
 - sector's focus on listening to students & commitment to continuous improvement
 - results showing high levels of satisfaction – in many cases higher than universities and higher than international benchmarks
- reputation with the media – positive news stories
- positioning in the market
- reputation with agents
- improved student satisfaction = increase in word-of-mouth recommendations
- growth in student numbers

Learning satisfaction – wave on wave comparison

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%

Support satisfaction – wave on wave comparison

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%



English Australia MEDIA RELEASE



4 July 2012

NEW RESEARCH SHOWS HIGH LEVELS OF STUDENT SATISFACTION WITH ENGLISH LANGUAGE SECTOR

English Australia is delighted to launch a new publication that reveals the latest findings regarding the international student experience in the English language sector.

STUDY
TRAVEL MAGAZINE

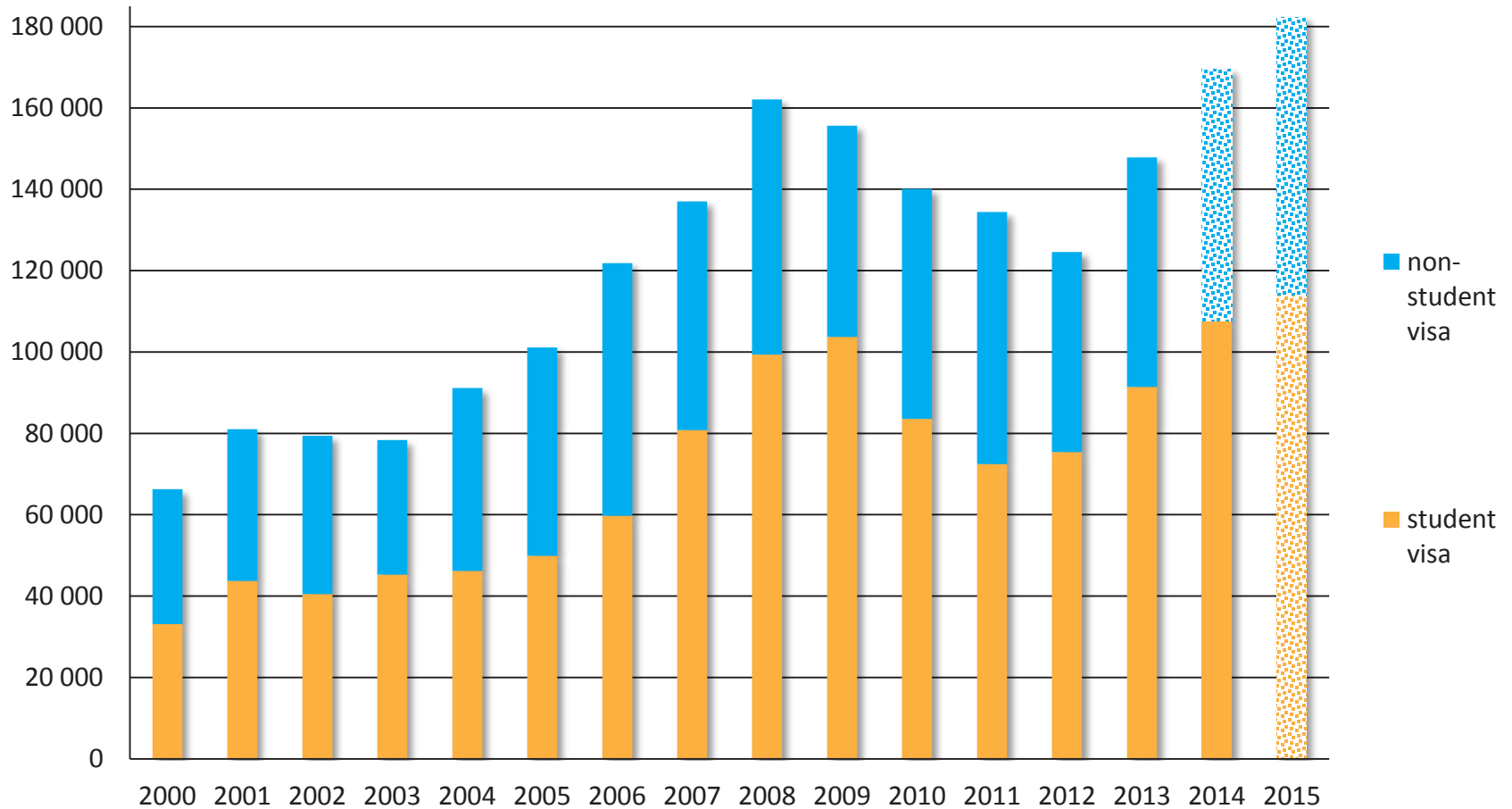
Your World

Satisfaction levels up at Australian language schools

July 9, 2012

Levels of student satisfaction are up in Australia's language sector, according to the findings of a survey of almost 9,000 international students.

ELICOS students – forecast



- previous 3 surveys
 - identified existing strengths
 - demonstrated improvement across all areas of weakness as a result of strategies undertaken over a 4 year period
- 4th Barometer planned for 2015
- streamlining of existing questions but still allowing for longitudinal comparisons
- re-focus of some questions to reflect current issues:
 - attitude to employment (importance/satisfaction)
 - attitude to accommodation (type/satisfaction)
 - engagement with local community

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