CONSULTANCY REPORT

NCVER

Trends in public and private VET provision: participation, finances, and outcomes

Prepared by the National Centre for Vocational Education Research on behalf of TAFE Directors Australia

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National Centre for Vocational Education and Training

NATIONAL CENTRE FOR
VOCATIONAL EDUCATION RESEARCH

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Overview of findings

The National Centre for Vocational Education Research (NCVER) was commissioned by TAFE Directors Australia to provide statistical information about the trends in VET training activity, financing and outcomes for the TAFE and non-TAFE sectors for the 2010—14 period. The areas we were asked to investigate and report on comprised:

- training hours and enrolments as a whole and for specific qualification levels (certificate I and II, certificate III, certificate IV and diploma and above)
- training hours and enrolments by field of education, level and type of qualification completed across fields of education (FOE)
- delivery sites for trade apprenticeships and traineeship programs (focusing on some selected programs, including plumbing, electrical, and aged care programs) where possible
- employment outcomes
- operating revenues and costs (including Commonwealth and state/territory government-funded activity)
- percentage split in VET FEE-HELP loans.

Addressing the requirements

We have been able to present comprehensive accounts of each of the above requirements in separate sections.

- Our first task was to decide how to categorise providers into separate entities. The first category is TAFE providers, while for the non-TAFE providers we used two groupings. The first group includes all privately operated organisations except those that we have grouped under the 'other' registered training organisation (RTO) and provider group — the second group. These 'other' RTOs and providers include schools, universities, non-government enterprises, professional associations, industry associations, equipment and product manufacturers and suppliers, and other providers not elsewhere classified. In this report we call the first group 'private RTOs'.
- We have done this for two reasons. One relates to the primary role of the provider, the other to how these providers report to NCVER. The role of the private RTO is similar to that of TAFE (technical and further education), in that it is primarily to deliver training and assessment, while the role of the 'other' RTOs and providers is primarily about other functions, and vocational education and training (VET) is done as an additional function. The other reason related to the way these RTOs and providers report to us. It has recently been decided that the TAFE sectors of dual-sector universities in Victoria will no longer report as TAFE but will come under the umbrella of university RTO.
- We note however that to draw out patterns and trends in activity for 2010—14 and to make sure that we are comparing apples with apples, we have had to use data on government-funded VET. Nevertheless, we also expand on this by noting patterns in participation and outcomes from the recently released 2014 total VET activity (TVA) data, which reports on activity regardless of funding. This actually provides a more comprehensive view of the public-private split in VET provision. This information has allowed us to more accurately identify student numbers, the size

of providers, and shares of enrolments, hours and completions in the VET sector as a whole. We include a section on TVA data under each of the requested requirements. Doing it this way has enabled us to augment each of the sections with a more comprehensive view of the total sector. We use such an approach to cover each of the requirements.

- We look at both program enrolments for qualifications and subject enrolments when we are discussing reporting hours by field of education. We do this to allow us to explore and report on the activity occurring in subject-only courses. In assembling this information for each of these requirements we make some observations about patterns and trends and leave the client to draw some high-level implications for the TAFE sector.
- The TVA collection does not include findings from the Student Outcomes Survey, which is the key survey NCVER relies on to understand employment outcomes.
- We have been fortunate to be given permission from the Commonwealth Government's VET FEE-HELP department to use the administrative data they collect to establish the five-year trends in loan activity and the proportional split between loans going to private and TAFE providers.
- We have also used the flag for apprentices and trainees in the National VET Provider Collection to obtain data about where they are getting their training. Here we have used the ANZSCO classifications for occupations to identify plumbing apprentices, electrical apprentices and trainees in aged care and disability services care. We have also been able to provide information on the shares of completions held by TAFE and non-TAFE providers in these occupations. As the Apprentices and Trainees Collection only has information on employer type we thought it best to rely on the National VET Provider Collection.

Key highlights

In this report we have assembled descriptive data on training activity and outcomes in government-funded VET, including the additional data currently available through the first year of Total VET Activity. From our analysis of this information a picture emerges of a TAFE sector that is gradually losing market share in many areas to non-TAFE RTOs and in most instances to private RTOs. The five-year trend data on government-funded training activity enable us to track the changes and see how trends have shifted downwards for TAFE and with some exceptions upwards for non-TAFE providers, especially private RTOs. The TVA data give us a more comprehensive view of the sector, regardless of funding.

Training activity

Between 2010 and 2014 the number of students in government-funded training stayed relatively stable, at approximately 1.8 million students. Under the Total VET Activity 2014 collection, which collects data regardless of funding source, there were 3.9 million VET students. Our analysis of training activity and reported hours for government-funded training between 2010 and 2014 tells a constant story.

- TAFE had the majority share of most training activity in program, subject and field of education enrolments and reporting hours between 2010 and 2014. However, its share has in the most part been declining. It has lost share to the non-TAFE sector, and mostly to private RTOs, especially for certificate III qualifications.

- Subject-only enrolment reporting hours in government-funded training between 2010 and 2014 are dominated by 'other' RTOs and providers, although they have lost considerable share to the other two groups, TAFE and private RTOs, in 2012. They have started to climb again in 2013 and 2014.
- Training package qualifications represent the highest number of program enrolments in government-funded training for all types of providers. TAFE has the highest numbers of enrolments for locally accredited skill sets and locally accredited qualifications. Private RTOs have the highest numbers of nationally accredited skills sets.
- TAFE continues to have the overwhelming majority shares of government-funded enrolments for plumbing and electrical apprentices. By comparison, private RTOs dominate the market for aged care trainees. 'Other' RTOs and providers, including enterprises, are gradually moving into the market for electrical apprentices.
- The top five training packages between 2010 and 2014 in government-funded training enrolments were in the suite of packages for community services; business services; tourism, hospitality and events; construction, plumbing services and integrated framework; and training and education.
- The top five training packages under total VET activity 2014 in terms of enrolments are included in the suite of packages in business services; construction, plumbing services and integrated framework; followed by health; financial services; and property services.
- Total VET activity 2014 data report that private RTOs have the highest share of program enrolment reporting hours in certificate IV, and diploma and higher qualifications. Private providers had 44% of market share of reporting hours for program enrolments in certificate III qualifications, substantially more than TAFE, with just over 35%, and more than double that of 'other' RTOs and providers. Private RTOs are also dominant in the certificate IV market, with just over 50% of market share. The share for TAFE stands at just over 35%, while that for 'other' RTOs and providers is almost 15%.

Completions

- In terms of TVA field of education (FOE), private RTOs produced 63% of the shares of program completions for government-funded training in management and commerce; 60% of the shares for education; 57.8% of the shares for society and culture; and just over half (52%) of the shares for health.
- The greatest shares of program completions for the top five training packages (in government-funded training) for TAFE are for qualifications in construction, plumbing services and integrated framework, followed by training and education, and community services. For private RTOs the top five shares of program completions were for qualifications in tourism, hospitality and events, followed by business services and community services.
- In government–funded training, private RTOs always have the highest load pass rate, with the exception of diploma or higher qualifications, where 'other' RTOs and providers have the highest rate.
- In relation to qualifications, the TVA preliminary data show us that the private RTOs produced just over 60% of certificate IV program completions, 58% of program completions for certificate III completions and 52% of program completions for diploma and above qualifications.

Employment outcomes: government-funded training

- For employment outcomes, 85% of graduates from fee-for-service TAFE and other government (domestic) providers were employed six months after training; they had the best employment rate performance. By comparison, 80% of graduates from private providers found employment six months after training. These employment rates are higher than the 75% for graduates from non-fee-for-service TAFE and other government providers, and community education providers. Employment rates for subject completers across the different providers are also around the 75% mark.
- For graduates not employed before training, between 40% and 50% of graduates from non-fee-for-service TAFE and other government providers, fee-for-service TAFE and other government providers, and private providers were employed six months after training had ended. For every year (with the exception of 2015) the employment rates for private providers were consistently higher than those of the non-fee-for-service TAFE and other government providers. In 2015, when rates dropped across the board, private providers produced employment rates that were slightly higher.
- Across the period, employment rates for not employed before training subject completers were generally much lower than for graduates who were not employed before their training. They stayed around the 40% mark for subject completers from private RTOs, the 30% mark for those subject completers from non-fee-for-service TAFE and other government providers, just over the 35% mark for fee-for-service TAFE and other government providers, and around the 25% mark for subject completers from community education providers. In 2015, 40% of not-employed before training subject completers from fee-for-service TAFE and other government providers (domestic) found a job six months after training. They outperformed graduates from non-fee-for-service TAFE and other government providers, whose employment rates were just 28%.

Operating revenue and expenditures

- In 2014, total operating revenues and expenditures (including those for Commonwealth and state and territory governments) stood at $8653.4 million, with expenditures at $7578.9 million. This represented a gradual increase in total operating revenues across the five-year period. The story for total operating expenditures is more nuanced, with figures rising between 2010 and 2012 and dropping steadily from that time until 2014.

VET FEE-HELP

- Since its inception, VET FEE-HELP has provided just over $3 billion to students eligible for these loans, between 2009 and 2014. Eligible students training with private providers have made the most use of the loans over the five-year period; they have been provided with loan amounts of just over $2 billion. The amount provided to public provider students for the same period was just under $800 million. This means that almost 75% of the total loan amount for the five-year period went to eligible students training with private providers compared with 25% going to eligible students training with public providers.

About this report

Over the last two decades there has been a significant increase in the number of RTOs delivering vocational education and training in Australia. This has been driven by rapid rises in the number of private RTOs moving into the VET space. The total VET activity report for 2014 shows that there were 3.9 million VET students, across 4601 distinct providers, comprising 2865 from the private sector, 960 schools, 497 community education providers, 210 enterprises, 57 TAFEs, and 15 university providers. There were 27.5 million subject enrolments, and 818.2 million reporting hours. The top five fields of study were management and commerce, followed by engineering and related technologies, society and culture, mixed field programs, and hospitality and tourism.

The 2014 financial collection, which looks at government-funded training and where it was spent, showed that the total operating revenue for 2014 was $8653.4 million, up 1.7% on 2013 figures. Revenue from the Australian Government increased by $571.6 million, up 22.3%, while revenue from state and territory governments decreased by $318.5 million, down 7.9% from the previous year. Total operating expenditures decreased $415.8 million (5.2%) to $7578.0 million in 2014 compared with 2013.

Purpose and method

The key purpose of this study is to look more closely at national data on training activity and operating revenues and expenditures to identify any major training market shifts in public and private sector provision in the Australian VET sector.

The report identifies key differences in training activity and outcomes, and operating revenues and expenditures (including VET FEE-HELP loans) over the last five years by using relevant NCVER statistical collections, including:

- total VET activity
- government-funded students and courses where necessary to construct a five-year trend line
- financial information
- Student Outcomes Survey.

Data sourced from the Australian Department of Education and Training VET FEE-HELP statistical database is used to construct the trend line indicating the uptake of VET FEE-HELP loans for the last five years for public and private providers.

To help identify major shifts in public and private provision and in operating costs and revenues we have interrogated these databases to identify and track sector differences. This has enabled us to identify the areas in which the public providers are seen as the dominant providers. It has also enabled us to better understand the extent to which the cost of provision (in terms of facilities, equipment and materials) determines sector dominance, and whether it is in fact the case that the more costly and resource-intensive programs are delivered by the public provider, TAFE.

We report public versus private sector differences over the last five years (2010—14) in terms of:

- student numbers
- training hours and enrolments as a whole and for specific qualification levels (certificates I and II, certificate III, certificate IV, and diploma and above)

- training hours and enrolments by fields of education
- delivery sites for trade apprenticeships and traineeship programs (focusing on some selected programs, including plumbing, electrical, and aged care programs) where possible
- level and type of qualification completed across fields of education
- employment outcomes
- operating revenues and costs (including Commonwealth and state/territory government-funded activity)
- percentage split in VET FEE-HELP loans.

We have identified the top 20 qualifications and the trend in activity for TAFE, private RTOs and 'other' RTOs.

Where it proves meaningful, we will report findings at the jurisdictional level. Otherwise we report at the national level.

Key definitions and explanations of categories used

We have taken the terms and definitions used by NCVER in its students and courses publications and the Student Outcomes Survey. These terms and definitions can be found in the support document accompanying *Students and courses: terms and definitions* (NCVER 2015a) and in the Terms section of the Student Outcomes Survey (2015b).

- *Government-funded training*: this is broadly defined as all activity delivered by government providers and government-funded activity delivered by community education providers and private training providers. Government-funded activity covers any level of government subsidy, full support or part subsidy (see appendix A for more details on scope).
- *Total VET activity*: this covers accredited training reported by 4601 distinct Australian providers, including registered training organisations and non-registered providers, including community education providers and schools (see appendix A for more details on the scope of TVA).
- *Australian Qualifications Framework (AQF) qualifications*: this refers to certificate I through to bachelor and higher degrees.
- *Non-AQF qualifications*: these comprise other recognised courses, non-award courses, skills sets (nationally and locally recognised) and subject-only — no qualification (NCVER 2015a). Non-AQF qualifications also include those from secondary education (Years 10, 11 and 12) and other education (statement of attainment, bridging and enabling courses, courses not classified elsewhere).
- *Field of education*: this refers to the broad area of study.
- *Reporting hours*: these are defined as the hours of training under a traditional delivery strategy for each subject enrolment.
- *Load pass rate*: this represents the calculation of the proportion of subjects successfully completed, measured in hours.

When we refer to *training activity and completions* and *load pass rates*, we have used two groupings of non-TAFE providers. One group comprises all privately operated organisations, with the exception of those we have grouped under the 'other' RTO and provider group. We call this group 'private

RTOs'. The 'other' RTO and provider group includes schools, universities, non-government enterprises, professional associations, industry associations, equipment and product manufacturers and suppliers, and other providers not elsewhere classified. These 'other' providers may be RTOs or non-registered providers. When we refer to these providers in the text throughout this document we may use the terms 'other' RTO and provider (always recognising the fact that providers must be an RTO or working in partnership with an RTO to deliver accredited qualifications, but they may be a provider receiving government funding for other programs so they must report activity; hence they appear in the database).

For the purposes of our section on *employment outcomes* we use the definitions from the Student Outcomes Survey to describe activity for other government providers. These providers include government–owned and managed education facilities/organisations, other than TAFE, that deliver VET (for example, agricultural colleges).

Key issues and limitations of approach

Our success in tracking these shifts is based on the accuracy and completeness of information that can be sourced for the requested five-year time period. Total VET activity was introduced for 2014 so there is no time series data available. We originally thought that we might need to address this issue depending on the data available from the VET Provider Collection for government-funded students and courses. However, we have been able to depend on the National Provider Collection and were given permission to use government data already split up according to provider type.

Student numbers

Government-funded VET 2010–14

In this section we present the number of students in the publicly-funded sector for the last five years (that is, 2010—14). We find that across this period the numbers of students have been trending upwards for Australia as a whole between 2010 and 2012 and declining in 2014. The greatest numbers of students studying with TAFE providers occur every year between 2010 and 2014. Across the period however, TAFE has lost its yearly share. By contrast, the share for private RTOs has trended upwards and flat-lined across the period. Although the share for 'other' RTOs and providers trended downwards, it lifted in 2014.

In 2010 TAFE's share of student numbers was just over 70%, while that for both private RTOs and 'other' RTOs was around 14% each. The share of total student numbers for TAFE has been gradually declining over the five-year period, while that for private providers has been gradually increasing. Over the five-year period TAFE lost just over 15 percentage points in its share of student numbers in publicly-funded training, while that for private RTOs increased by nine percentage points. What TAFE lost was made up for by both the private RTOs and 'other' RTO and providers.

Table 1 Number and percentage of students in government-funded VET by state and territory jurisdiction and provider type, 2010–14

Training provider	2010	2011	2012	2013	2014
Total TAFE	1 293 237	1 245 260	1 252 096	1 185 163	1 024 656
Private RTO	253 161	387 964	447 478	438 974	416 777
Other	226 200	226 840	224 558	229 754	347 710
Total	**1 772 598**	**1 860 064**	**1 924 132**	**1 853 891**	**1 789 143**

	%	%	%	%	%
Total TAFE	73.0	67.0	65.1	63.9	57.3
Private RTO	14.3	20.9	23.3	23.7	23.3
Other	12.8	12.2	11.7	12.4	19.4
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: National VET Provider Collection, 2014.

The picture was similar across the states and territories in general. Only Western Australian, Queensland and the Northern Territory experienced rises in participation for the private sector between 2013 and 2014. For other jurisdictions these numbers decreased.

Table 2 Number of students by state and territory and provider type in government-funded VET, 2010–14

State/territory Provider type	2010	2011	2012	2013	2014
New South Wales					
TAFE	424 060	425 370	445 789	428 303	424 774
Private RTO	38 436	45 509	45 505	37 898	33 748
Other provider	115 719	111 156	103 988	93 761	101 793
Total	**578 215**	**582 035**	**595 282**	**559 962**	**560 315**
Victoria					
TAFE	363 795	341 012	336 408	306 655	225 087
Private RTO	90 750	192 291	252 565	251 687	212 399
Other provider	46 302	48 348	42 174	59 881	150 062
Total	**500 847**	**581 651**	**631 147**	**618 223**	**587 548**
Queensland					
TAFE	214 243	194 386	189 209	166 048	124 584
Private RTO	56 852	77 810	70 965	62 184	93 210
Other provider	29 675	32 115	30 499	23 622	46 313
Total	**300 770**	**304 311**	**290 673**	**251 854**	**264 107**
South Australia					
TAFE	89 273	83 896	88 787	94 682	74 488
Private RTO	21 297	23 334	29 036	41 712	30 209
Other provider	13 286	15 808	24 661	29 316	25 146
Total	**123 856**	**123 038**	**142 484**	**165 710**	**129 843**
Western Australia					
TAFE	123 212	123 008	120 019	116 778	108 541
Private RTO	26 656	29 928	29 163	28 462	31 914
Other provider	16 090	14 809	18 076	18 515	12 179
Total	**165 958**	**167 745**	**167 258**	**163 755**	**152 634**
Tasmania					
TAFE	39 325	38 213	33 209	32 872	28 257
Private RTO	9 427	8 082	8 796	8 877	7 383
Other provider	805	1 127	964	1 218	8 116
Total	**49 557**	**47 422**	**42 969**	**42 967**	**43 756**
Northern Territory					
TAFE	16 398	16 752	16 242	16 990	18 074
Private RTO	5 815	6 221	5 881	3 792	4 254
Other provider	1 830	1 449	2 128	2 165	2 734
Total	**24 043**	**24 422**	**24 251**	**22 947**	**25 062**
Australian Capital Territory					
TAFE	22 931	22 623	22 433	22 835	20 851
Private RTO	3 928	4 789	5 567	4 362	3 660
Other provider	2 493	2 028	2 068	1 276	1 367
Total	**29 352**	**29 440**	**30 068**	**28 473**	**25 878**

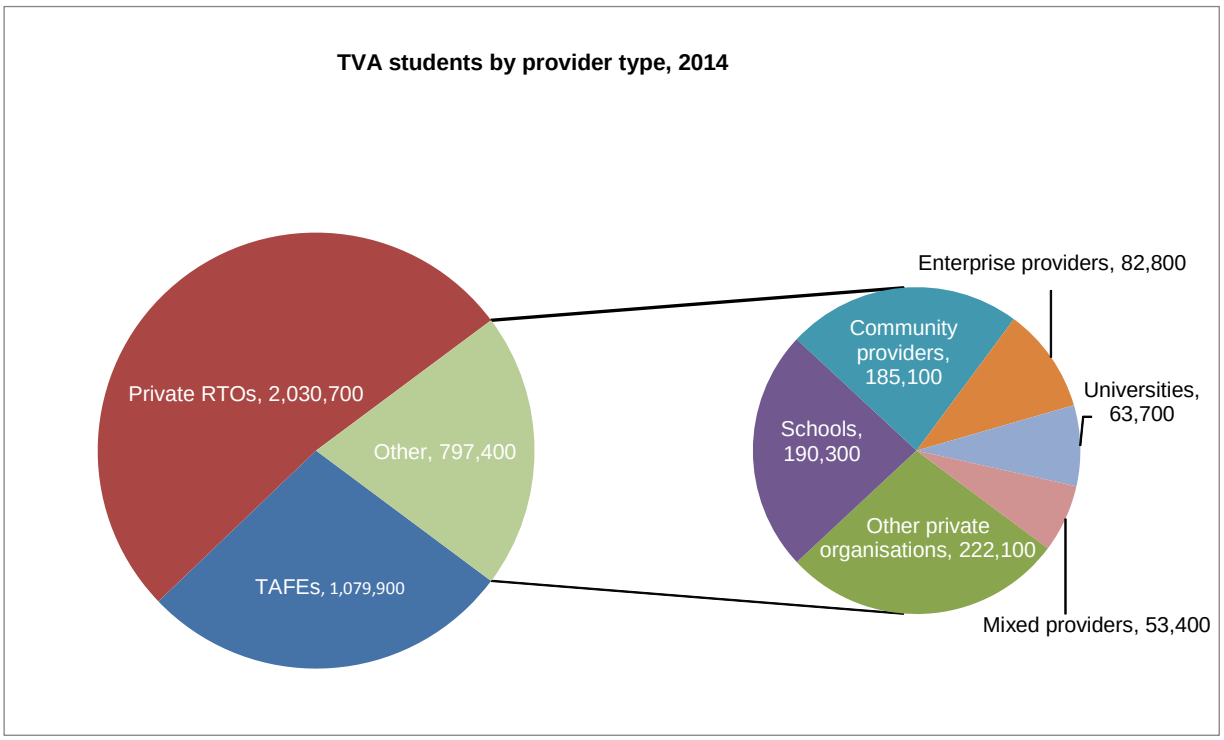
Source: National VET Provider Collection, 2014.

Total VET activity numbers for 2014 only

Students

In 2014 a broader picture of the share of public and private provision was made possible by the total VET activity initiative, which collected and reported on all training activity, irrespective of funding. This data collection showed that there is over twice the number of students attending non-TAFE providers than attend TAFE.

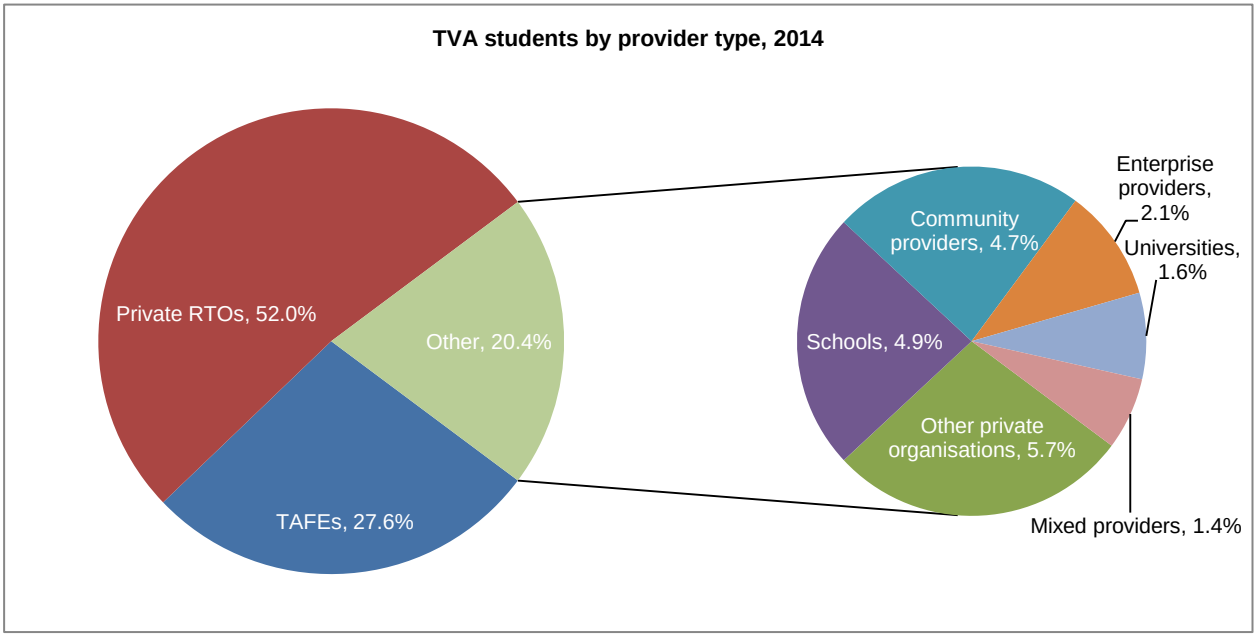
Figure 1 Number of students by type of providers, Australia, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Over half of the students were with private RTOs, just over a quarter with TAFE, and the remainder were with 'other' RTOs and providers.

Figure 2 Percentage share of students by type of providers, Australia, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Apart from Tasmania and overseas locations, the number of students attending private RTOs across the remaining jurisdictions was always greater than those attending TAFE. There were major differences between the jurisdictions in relation to the level of private provision.

Table 3 Students by provider type and the state or territory where the training was delivered, TVA 2014

	State or territory where the training was delivered											
Provider type	**NSW**	**VIC**	**QLD**	**SA**	**WA**	**Tas.**	**NT**	**ACT**	**Other Australian territories or dependencies**	**Overseas**	**Not known**	**Total**
TAFE	441 100	225 200	125 400	80 900	114 700	28 800	3 700	20 800	-	24 100	1 000	1 065 600
Private RTOs	503 200	530 700	604 300	100 000	208 000	16 000	22 900	37 200	0	3 100	5 300	2 030 700
Other providers	187 100	296 500	152 000	61 300	49 800	18 100	23 700	18 800	-	3 600	900	811 700
University	*400*	*54 100*	*3 900*	*200*	*600*	*800*	*14 600*	*0*	*-*	*3 500*	*0*	*78 000*
School	*73 300*	*50 700*	*57 300*	*1 000*	*2 400*	*1 500*	*500*	*3 500*	*-*	*-*	*0*	*190 300*
Community education provider	*55 400*	*76 400*	*10 600*	*9 900*	*18 500*	*2 400*	*5 600*	*6 100*	*-*	*0*	*100*	*185 100*
Enterprise provider	*23 100*	*12 800*	*16 000*	*14 600*	*12 400*	*1 500*	*1 400*	*800*	*-*	*100*	*200*	*82 800*
Other training providers	*25 200*	*102 500*	*34 200*	*28 500*	*9 700*	*11 800*	*1 700*	*8 300*	*-*	*0*	*200*	*222 100*
Students attending more than one provider type	*9 700*	*0*	*30 000*	*7 200*	*6 200*	*-*	*0*	*0*	*-*	*-*	*300*	*53 400*
Total	**1 131 400**	**1 052 400**	**881 600**	**242 200**	**372 400**	**62 900**	**50 300**	**76 800**	**0**	**30 900**	**7 200**	**3 908 000**

Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Providers

When we look at the number of providers operating across the country, it makes sense to look at the headquarters of providers, as many providers also operate across a number of states and territories. When we do this we find that, for government-funded training for Australia as a whole, there were approximately 4600 *distinct* providers, some of whom have operations across states. These comprised 57 TAFES, just over 2577 private RTO providers, and approximately 1987 other RTOs and providers (comprising 1000 schools, 500 community providers, 200 enterprise providers, 15 universities, and 300 various other providers).

The state with the greatest number of providers headquartered in its jurisdiction was by far Victoria. However, the state with the greatest number of private training RTOs headquartered in its jurisdiction was Queensland, followed by New South Wales and Victoria. Victoria, followed by Queensland, had the most numbers of schools delivering VET, while New South Wales had the least number of schools doing so. Victoria had by far the greatest number of community education providers.

Table 4 Training providers by state or territory of training provider's head office, TVA 2014

Provider type	NSW	VIC	QLD	SA	WA	Tas.	NT	ACT	Not known	Total
TAFE	11	14	14	3	12	1	1	1	0	57
Private RTOs	684	533	759	182	301	34	29	53	2	2 577
Other providers	215	1 002	446	148	84	41	18	45	0	1 999
University	*2*	*5*	*2*	*2*	*2*	*1*	*1*	*0*	*0*	15
School	*14*	*564*	*330*	*6*	*21*	*5*	*3*	*17*	*0*	960
Community education provider	*86*	*303*	*30*	*35*	*15*	*11*	*5*	*13*	*0*	498
Enterprise provider	*58*	*43*	*39*	*20*	*31*	*9*	*6*	*8*	*0*	214
Other organisations	*57*	*87*	*46*	*85*	*15*	*15*	*3*	*7*	*0*	315
Total number of distinct providers	**910**	**1 549**	**1 219**	**333**	**397**	**76**	**48**	**99**	**2**	**4 601**

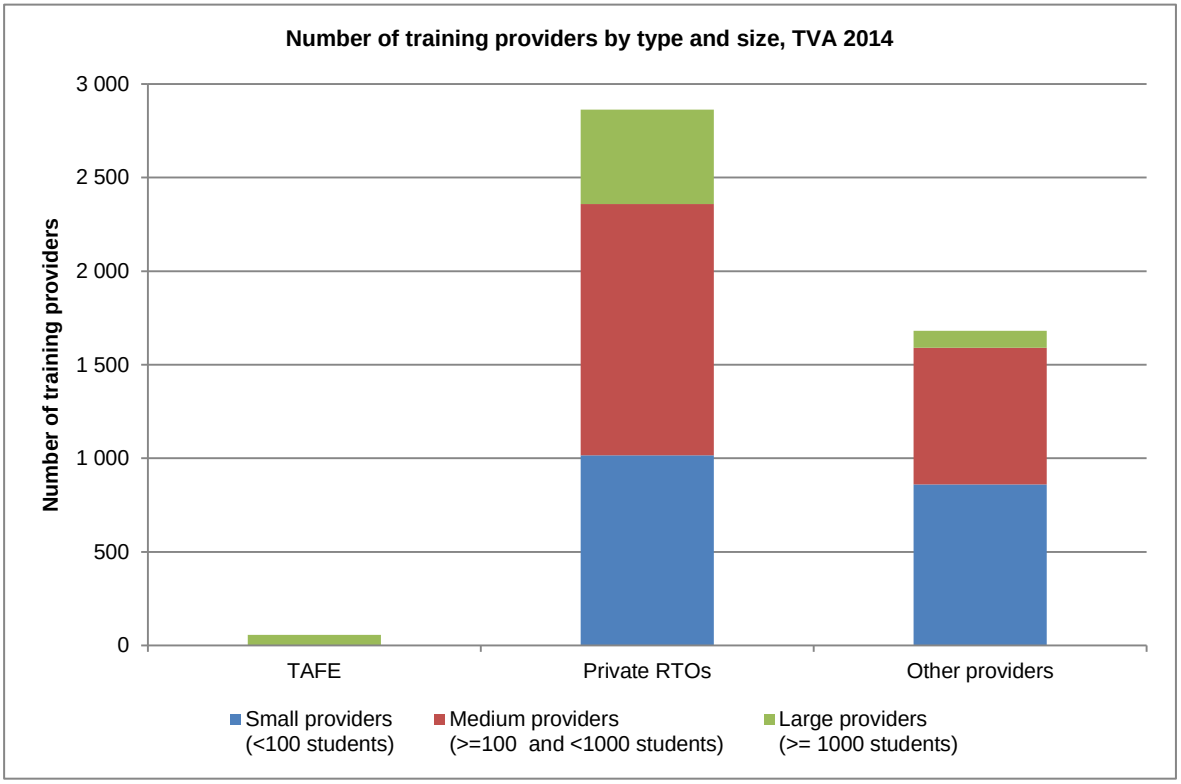
Note: The number of training providers is a distinct count of training providers that submitted data within each state or territory and training provider category. Some training providers deliver VET in more than one state or territory and/or reported data under more than one training provider type category. Therefore, the training providers are counted in each state/territory category and provider type category, but only counted once in the total. The total refers to distinct providers.

Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Provider size

To get an idea of the relative sizes of the RTOs delivering VET across the sectors, we take the number of students for each provider and then characterise the size of the provider as small, medium and large. Small providers have up to 100 students, medium providers between 100—999 students, and large providers have 1000 or more students. We find that 55 of the 57 TAFEs were large providers, with the remaining two being medium providers. The majority of private RTOs are mostly made up of medium and small providers (in the main, medium providers); however, some private RTOs are also among the large providers. 'Other' RTOs and providers are also, in the main, of small and medium size but they too have a smattering of large providers among them.

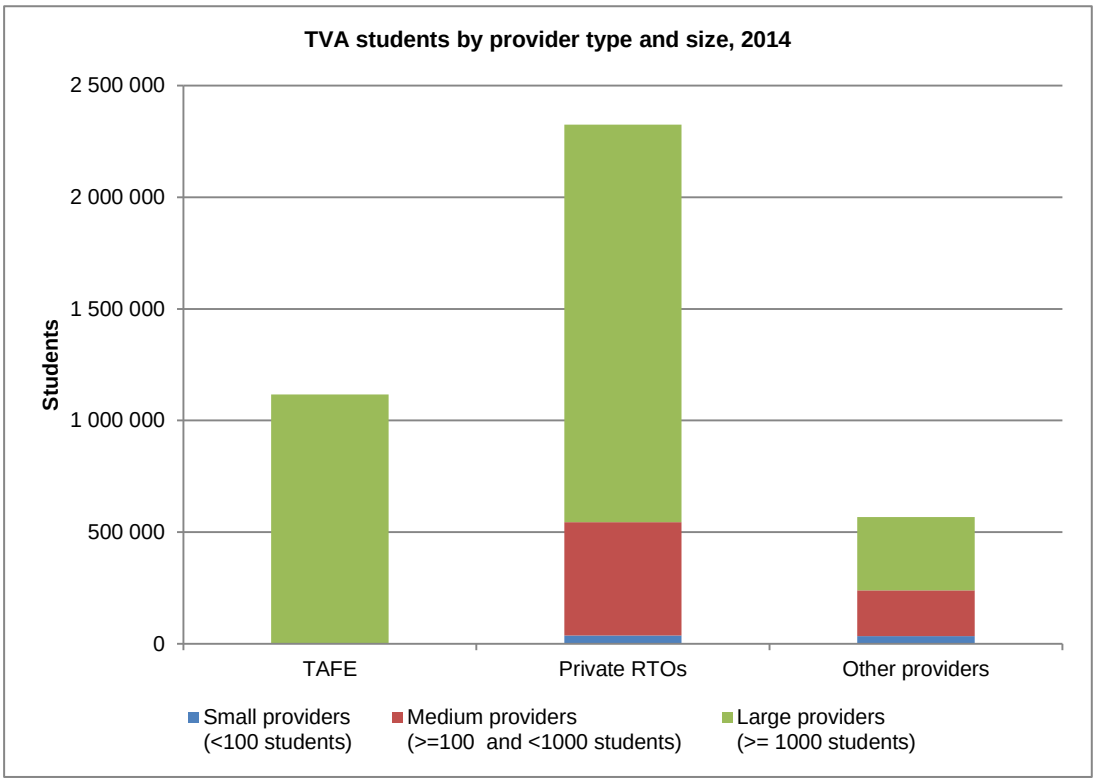
Figure 3 Number of training providers by provider size, TVA 2014



Source: National VET Provider Collection, 2014.

The largest number of students can be found in the non-TAFE sector, especially with private RTOs.

Figure 4 Number of students by training provider size, TVA 2014



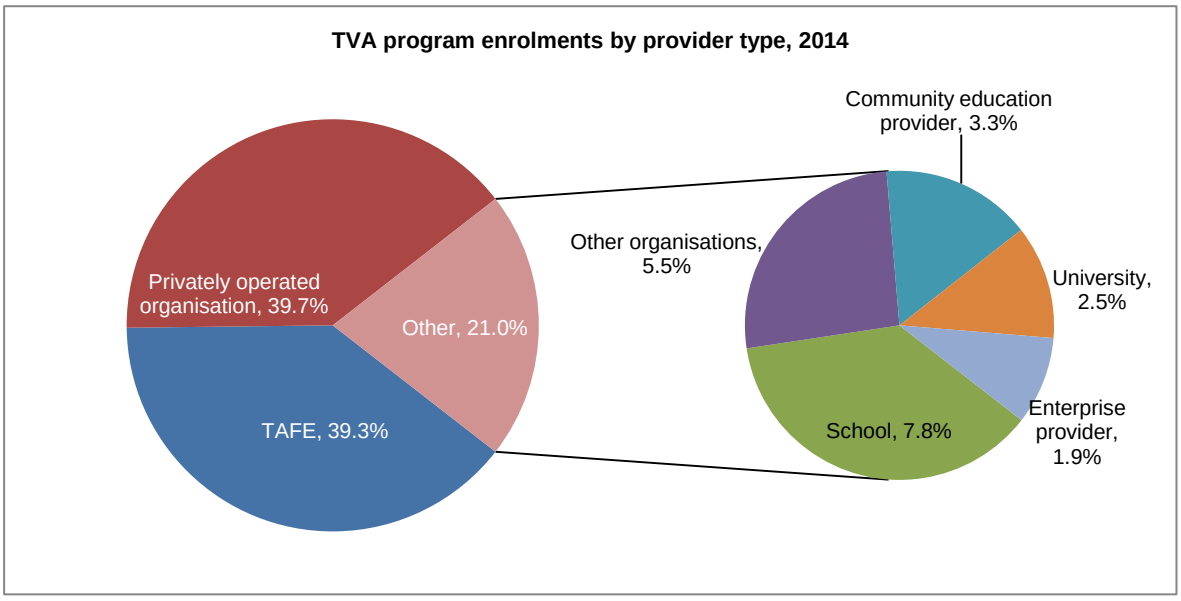
Source: National VET Provider Collection, 2014.

TAFE providers may represent the smallest number of providers; however, they have the largest student populations per provider (with some exceptions).

Total VET activity: enrolments for 2014

When we look at the total VET activity data for 2014 we find that non-TAFE providers represent just under 50% of the enrolments compared with around 40% for the TAFE providers.

Figure 5 Enrolments by provider type, Australia, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Enrolments in qualifications

Government-funded training

In 2010 there were 1 702 197 enrolments in government-funded AQF and non-AQF qualifications with TAFE. By 2014 these had dropped to just over 1 329 957 enrolments (representing a decrease of 22%). By comparison, there were 274 820 enrolments with private RTOs, and about 185 083 enrolments with 'other' RTOs and providers. In 2014 private RTOs added another 207 154 enrolments (representing a 75% increase), while 'other' RTOs and providers added another 124 652 enrolments (representing an increase of around 67%). In 2010 the share of TAFE enrolments in publicly-funded AQF and non-AQF qualifications (as a whole) was 79%; for private RTOs, it was 13% and for 'other' RTOs, it was 9%. By 2014 the share for TAFEs had fallen to 63%, while that for private RTOs and 'other' RTOs had increased to 22.7% and 15% respectively.

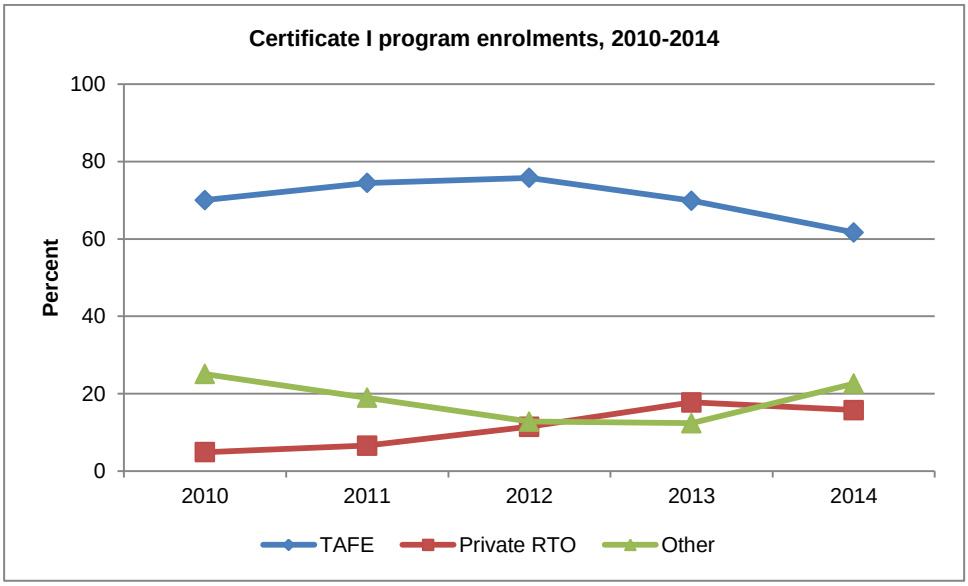
To obtain an insight into the level of qualifications being offered and provided by TAFE, private RTOs and 'other' providers, we look at enrolment trends across the qualification levels. We find that, by comparison with 2010 enrolments, the number of total enrolments in AQF qualifications increased for both TAFE and private RTOs in 2011 and 2012. Where private RTOs increased enrolments in AQF qualifications in 2013 and 2014, for TAFE these numbers declined.

Non-AQF qualifications tell a different story. The share decreased for TAFE between 2010 and 2014. Where they decreased for TAFE, they increased for private RTOs and 'other' RTOs or providers.

We take as our starting point the enrolments for 2010. We find the following differences:

- *Certificate I* enrolments have generally trended downwards for TAFE and 'other' RTOs and increased for private RTOs. In 2010 almost 70% of enrolments were delivered by the TAFE provider; just 5% were delivered by private RTOs, with just over 25% being delivered by 'other' RTOs. For TAFE providers the percentage share fluctuated between 70% and 75% until 2014, when it dropped 10 percentage points to just over 60%. For private RTOs the share trended upwards for most of the period. Although it had started to fall away in 2014, it was still almost three times what it was in 2010. For 'other' RTOs and providers, the share has generally trended downwards, with a slight lift in 2014, to be at 23%.

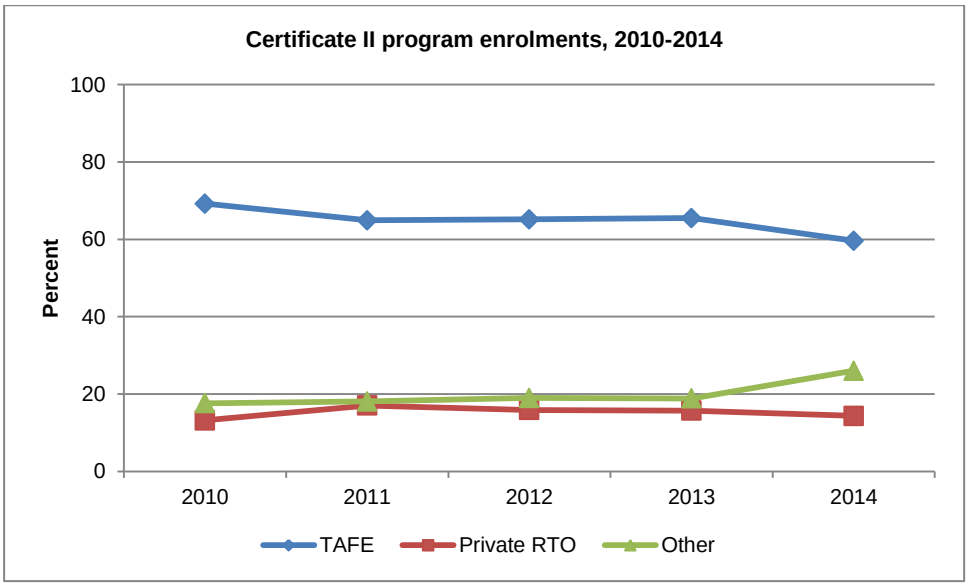
Figure 6 Shares of certificate I program enrolments in government-funded VET by provider type, 2010—14



Source: National VET Provider Collection, 2014.

- *Certificate II* enrolments have generally trended downwards for TAFE, and stayed relatively stable for private RTOs and for 'other' RTOs and providers. In 2010 the share for certificate II enrolments for TAFE was similar to that for certificate I qualifications (around 70% in 2010 and 60% in 2014). Over the period, certificate II shares for private RTOs stayed relatively stable. In 2014 the share for private RTOs was 14%. Where the share for TAFE and private RTOs declined from the previous year, 'other' RTOs and providers stayed around the 19% mark, with slight increases experienced each year between 2010 and 2013, and slightly higher increases in 2014. In 2014 they had just over a quarter (26.9%) of the shares for certificate II. If we combine the enrolment share for all non-TAFE RTOs we find that they had 40% of the market.

Figure 7 Shares of certificate II enrolments in government-funded VET by provider type, 2010–14

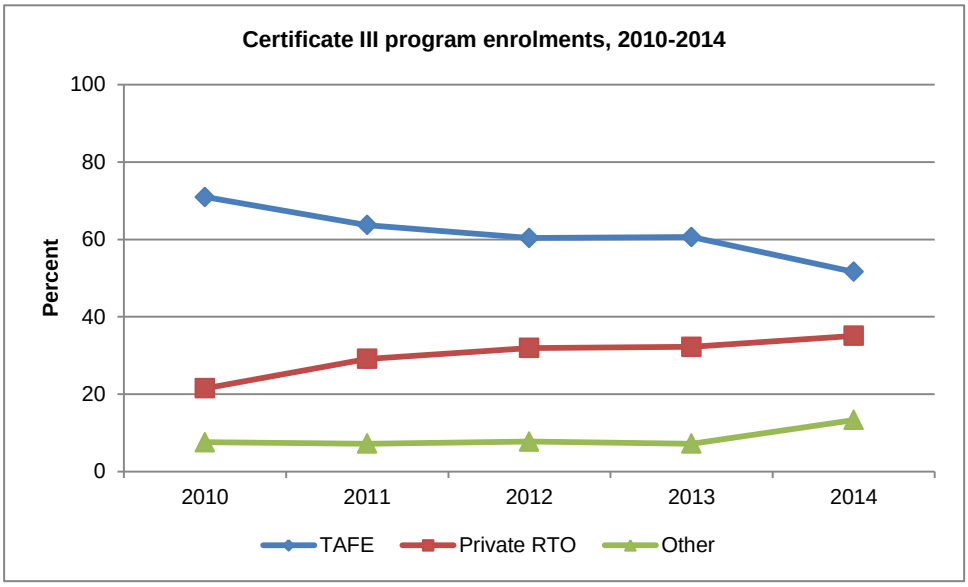


Source: National VET Provider Collection, 2014.

- *Certificate III* enrolments have generally trended downwards for TAFE, increased steadily for private RTOs, and stayed relatively stable for 'other' RTOs and providers until 2014, when they began to trend upwards. In 2010 TAFE had fewer than 70% of the share of certificate III enrolments compared with just over 20% of the share for private RTOs. From 2010 onwards the

share for TAFE consistently dropped, until in 2014 it had dropped to just over half of the total share. By contrast, the share for private RTOs increased consistently, until in 2014 they had just over 35% of the share. Similarly for 'other' RTOs and providers, their share was around 8% in 2010. In 2014 they had climbed to 13%. If we take the combined shares for all non-TAFE RTOs and providers we find that in 2014 they had almost half of the market share.

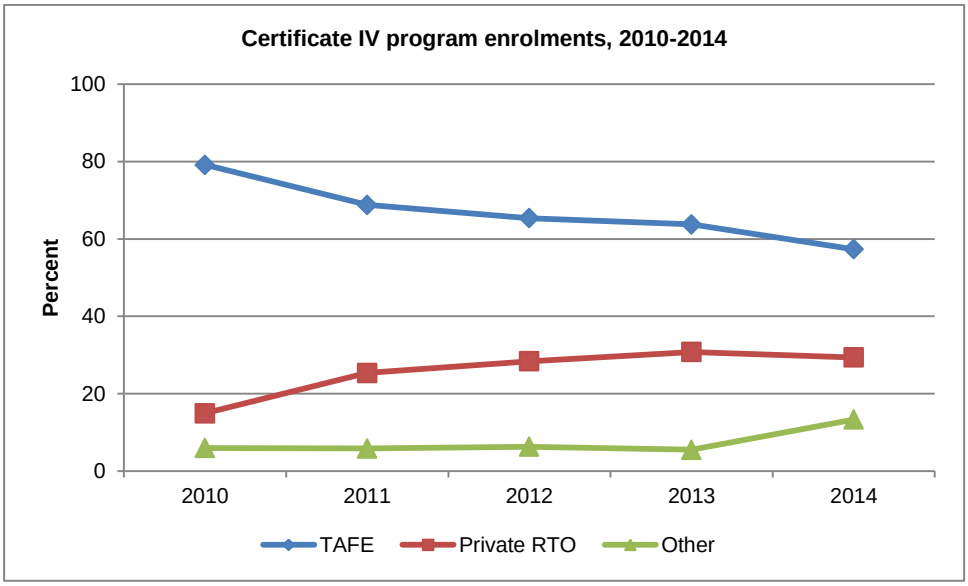
Figure 8 Shares of certificate III enrolments in government-funded VET by provider type, 2010–14



Source: National VET Provider Collection, 2014.

- *Certificate IV* enrolments for TAFE have dropped steadily and consistently throughout the period, while the shares for private RTOs have consistently trended upwards. Although the share for 'other' RTOs and providers has remained relatively stable, they began to trend upwards in 2014. In 2010 TAFE had almost 80% of the share of certificate IV enrolments; by 2014 this had dropped to just 57%. By contrast, the share of certificate IV enrolments for private RTOs was around 15% in 2010; between 2013 and 2014 the share had almost doubled to around 30%. The shares for 'other' RTOs and providers for each of the years between 2010 and 2014 were much lower. In 2010, 2011 and 2012 they had about 7% of the share; this dipped slightly in 2013 and then climbed to around 14% in 2014. If we combine the non-TAFE shares for 2014 we find that they accounted for just over 40% of the market share.

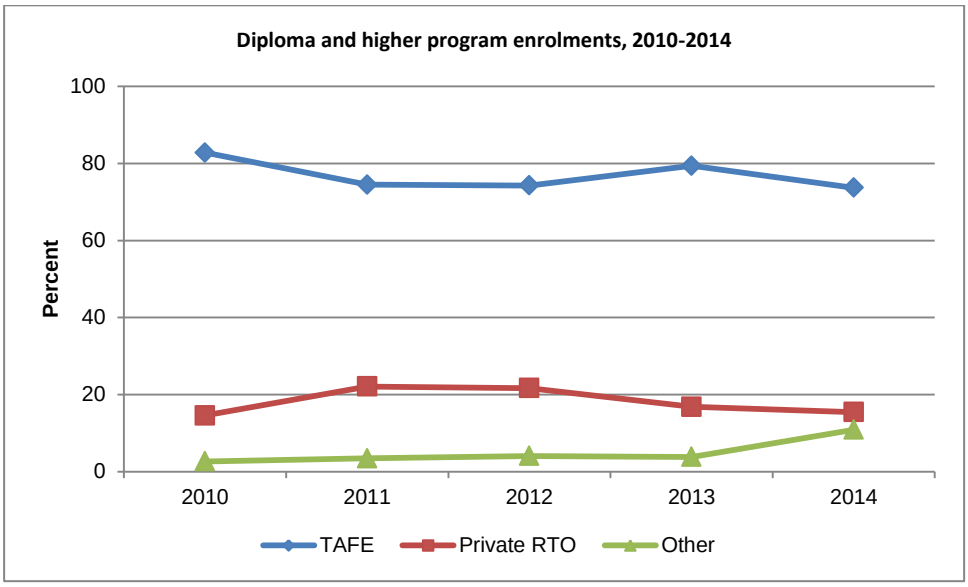
Figure 9 Shares of certificate IV program enrolments in government-funded VET by provider type, 2010–14



Source: National VET Provider Collection, 2014.

- *Diploma and higher qualification* enrolments have also trended downwards for TAFE. In 2010 its share stood at 83%; by 2014 it had dropped by 10 percentage points. By comparison, the share for private RTOs was 15% in 2010 and 2014 but they had experienced some fluctuation during the middle of the period, when they trended slightly upwards. In 2010 the enrolment share for 'other' RTOs and providers was just 3%; it doubled and fluctuated around this mark until 2014, when it experienced a sharp rise and doubled again, to be 10%. If we combine the shares for all non-TAFE RTOs, we find that they accounted for 26% of market share.

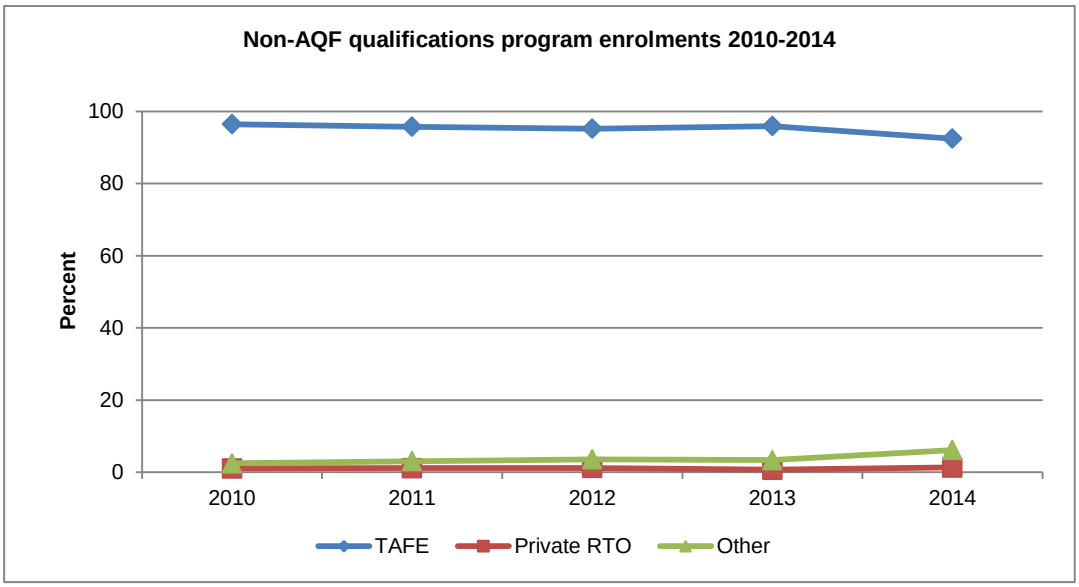
Figure 10 Shares of diploma and higher qualification program enrolments in government-funded VET by provider type, 2010–14



Source: National VET Provider Collection, 2014.

- *Non AQF qualification* enrolments for TAFE have remained relatively stable across the period. In 2010 TAFE had 95% of the share of these enrolments; by 2014 the TAFE share stood at around the same mark. By comparison, the shares for private RTOs accounted for around 1% throughout most of the period. The shares for 'other' RTOs were more than double that for private RTOs for most of the period. If we combine the shares for non-TAFE providers we find that they accounted for just 7% of market share.

Figure 11 Shares of non-AQF program enrolments in government-funded VET by provider type, 2010–14



Source: National VET Provider Collection, 2014.

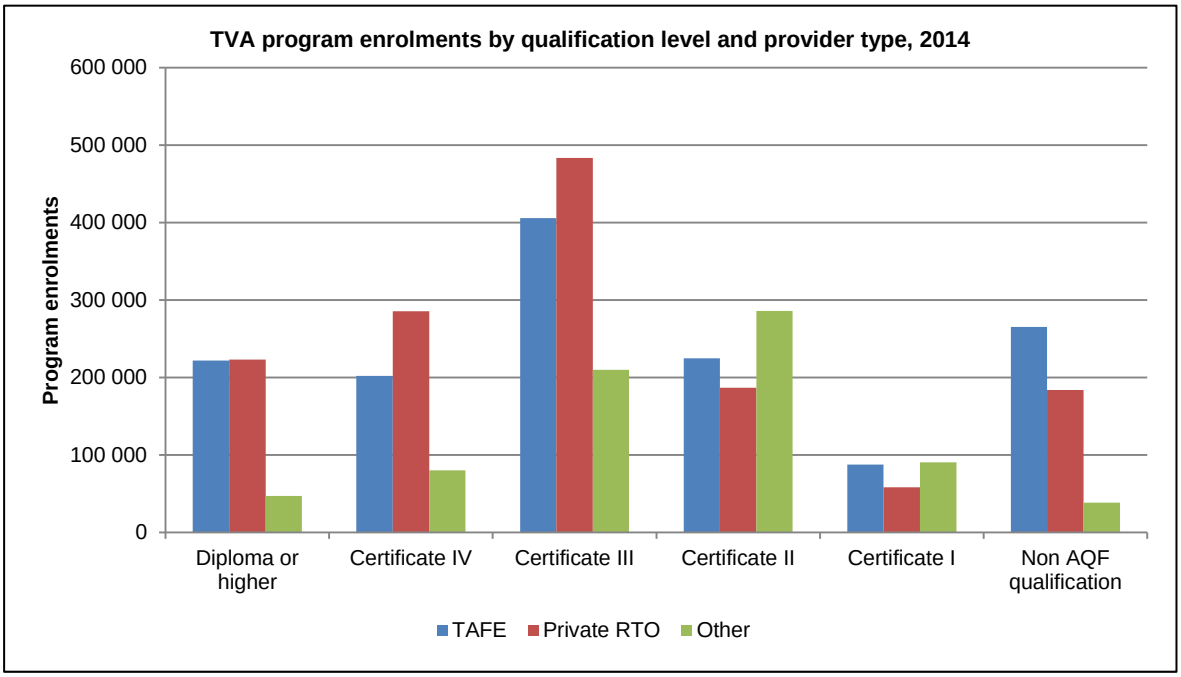
Total VET activity – 2014

In 2014 there were a total of 3.5 million program enrolments across AQF and non-AQF qualifications. TAFE and private RTOs each reported just over 1.4 million enrolments, with 'other' RTOs and providers reporting around 752 000 enrolments. Private RTOs reported slightly more enrolments than TAFE. TAFE had 39.3% of the share, while private RTOs had 39.7% of the share. 'Other' RTOs and providers had 21% of the share.

The highest number of enrolments for both TAFE and private RTOs were for certificate III, while those for 'other' RTOs and providers were for certificate II. In all cases, apart from certificate I and II and non-AQF qualifications, the enrolments for private RTOs exceeded those for TAFE. 'Other' RTOs and providers had the highest numbers of certificate I and II enrolments.

Certificate III had just under a third of all enrolments followed by certificate II, which represented about a fifth of all enrolments.

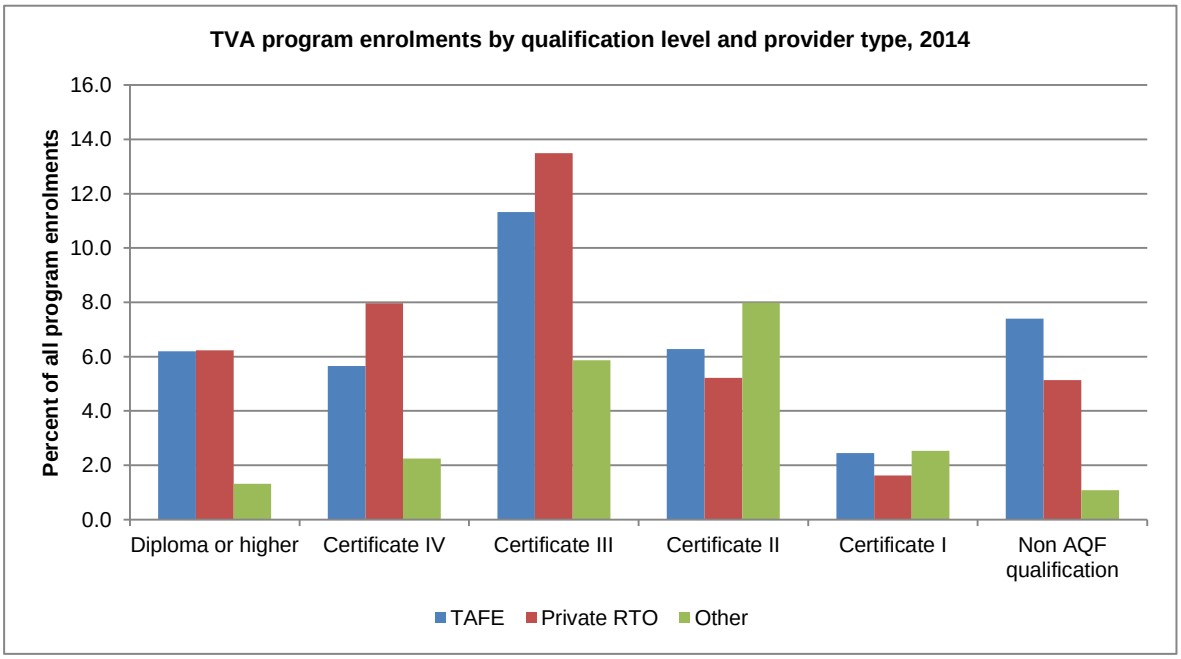
Figure 12 Number of program enrolments by qualification level and provider type in the TVA collection for 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

When we take the percentage of all qualification types held by each individual qualification type and compare the provider types, we find that certificate III delivered by private RTOs had the greatest share, followed by those delivered by TAFE (13.5% and 11.3% respectively). The next highest share was for certificate IV delivered by private RTOs and certificate II delivered by 'other' RTOs and providers. These were followed by certificate II delivered by TAFE; diploma and higher-level qualifications were evenly divided between those delivered by TAFE and private RTOs.

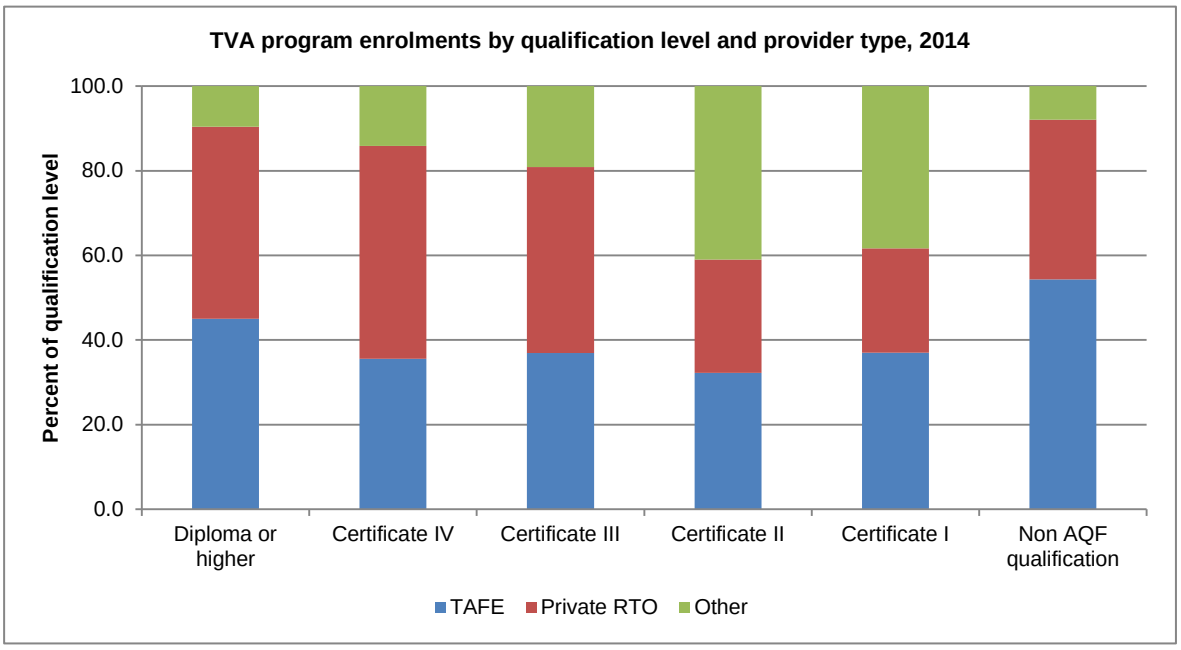
Figure 13 Program enrolments as a proportion of all enrolments by qualification level and provider type in the TVA collection for 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

When we look at the shares of separate qualifications that each provider type holds, we find that TAFE and private RTOs have relatively similar shares of total enrolments. However non-TAFE providers combined have just over 60% of total market share.

Figure 14 Program enrolments by qualification level, TVA, 2014



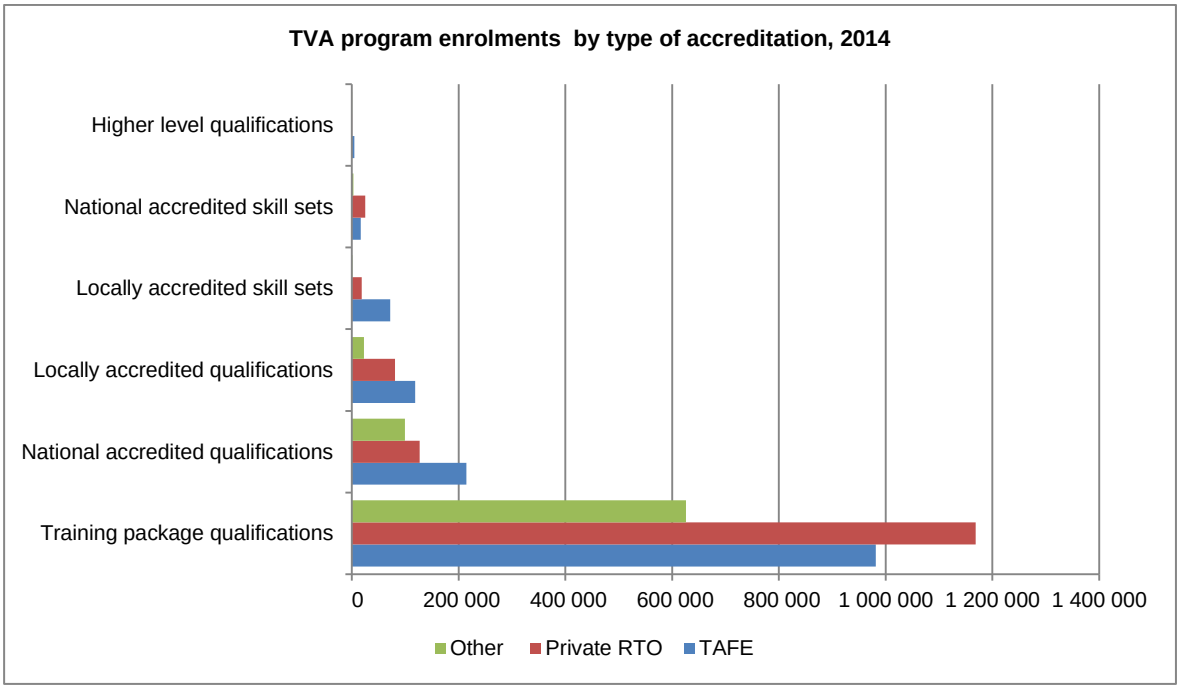
Source: National VET Provider Collection and National VET in Schools Collection, 2014.

We can also get a feel for the magnitude of the provider share for each qualification type by taking a percentage of the total number of enrolments for each qualification for each provider type.

- *Certificate I qualifications*: 'other' RTOs and providers and TAFE each have just under 40% of the share of this qualification, with a quarter of the share held by private RTOs.
- *Certificate II qualifications*: the greatest share here is held by 'other' RTOs and providers, who held just over 40%, while the TAFE share was around 32%, and that for private RTOs was about 25%.
- *Certificate III qualifications*: we find that private providers had 44% of market share for certificate III qualifications, substantially more than TAFE, with just over 35%, and more than double that of 'other' RTOs and providers.
- *Certificate IV qualifications*: private RTOs have captured this market with just over 50% of market share. The share for TAFE stands at just over 35%, while that for 'other' RTOs and providers is almost 15%.
- *Diploma and higher qualifications*: there is not much difference between TAFE and private RTOs in their market shares of diploma or higher-level qualifications with each holding just over 45% of the market share. 'Other' RTOs and providers have around a tenth of the share.
- *Non-AQF qualifications*: the greatest share of the market for these is held by TAFE providers, who hold almost 55% of the share. This share is substantially higher than that for private providers, who have less than 40% of the share. 'Other' RTOs and providers have only a small portion of market share.

Training package qualifications represent the highest number of enrolments for all types of providers, while TAFE has the highest numbers for locally accredited skill sets and locally accredited qualifications. Private RTOs have the highest numbers of national accredited skills sets.

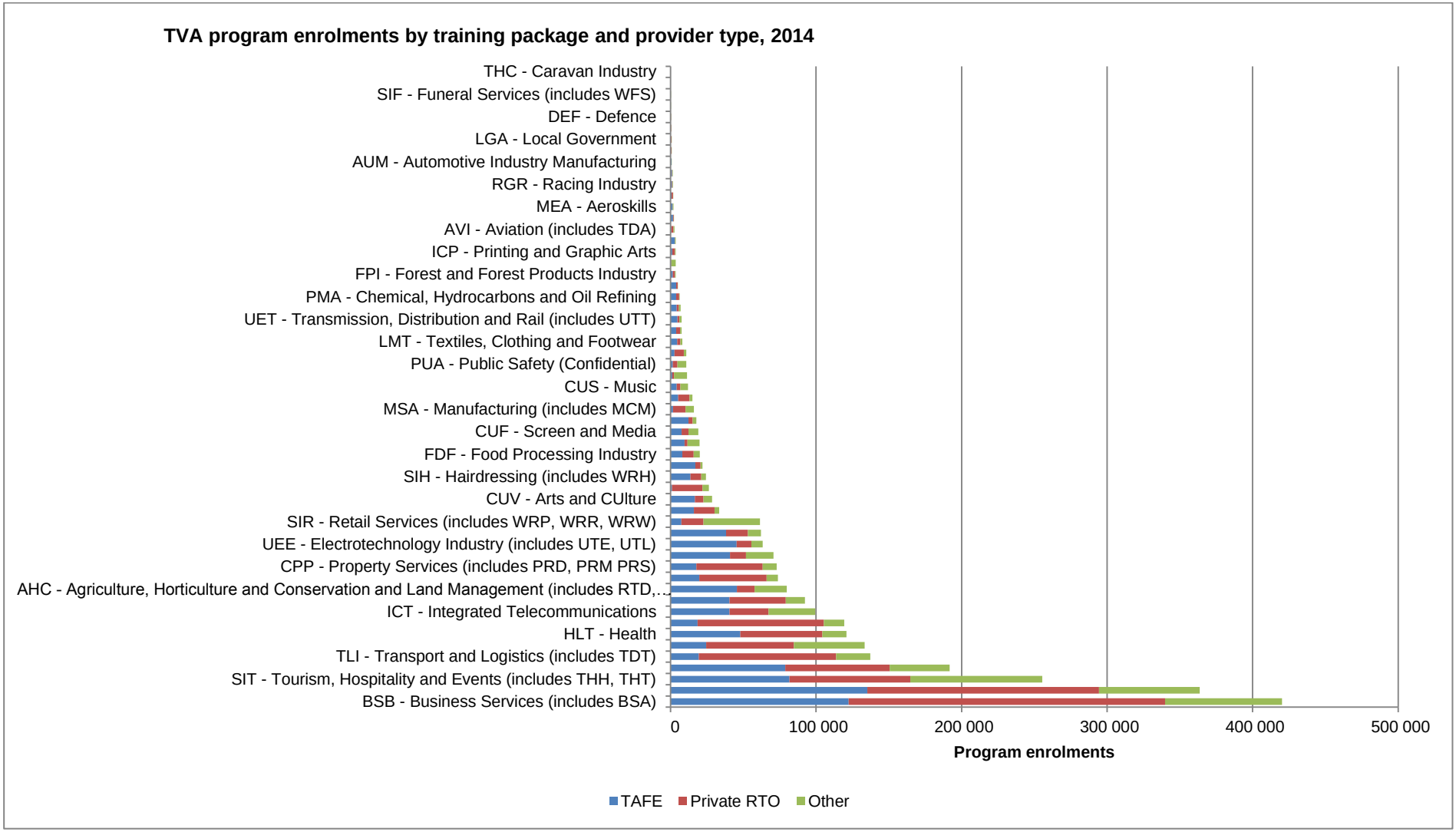
Figure 14 Program enrolments by type of accreditation, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

The top five training packages in terms of enrolments are included in the suite of packages in business services; construction, plumbing services and integrated framework; followed by health; financial services; and property services.

Figure 16 Enrolments by training packages and provider type, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

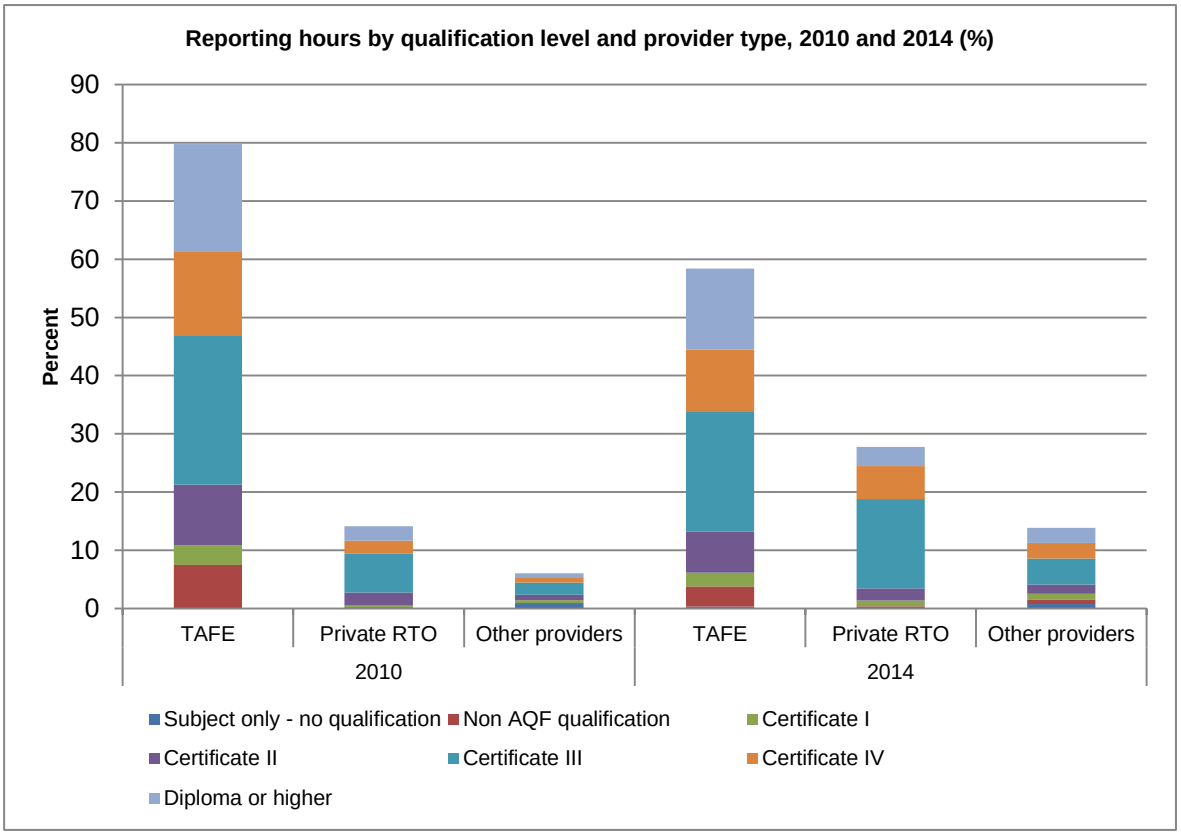
Reporting hours for subject enrolments in different qualifications

Government-funded training

In 2010 there was a total of almost 470 million reporting hours for subjects at AQF certificates I to IV, diploma and higher qualifications, and non-AQF and subject-only programs. By 2014 the number of hours had climbed to almost 550 million. During the period they had trended steadily upwards until 2013, when they fell to around 540 million reporting hours. They rallied slightly again in 2014. In 2010, 80% of these hours were delivered by TAFE, while 14.1% by private RTOs and 6.1% by 'other' RTOs. In 2014 these shares had dropped to around 60% for TAFE, just under 30% for private RTOs, and 14% for 'other' RTOs and providers.

When we take a percentage of the total reporting hours for subject enrolments for each of the qualification and non-qualification types for 2010 and for 2014, we find that the highest number of reporting hours was for certificate III qualifications delivered by TAFE, followed by subject-only hours, also delivered by TAFE. Third in the order were non-AQF qualifications also delivered by TAFE. For 2014 this order for TAFE remained the same, but the proportions had decreased.

Figure 17 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14

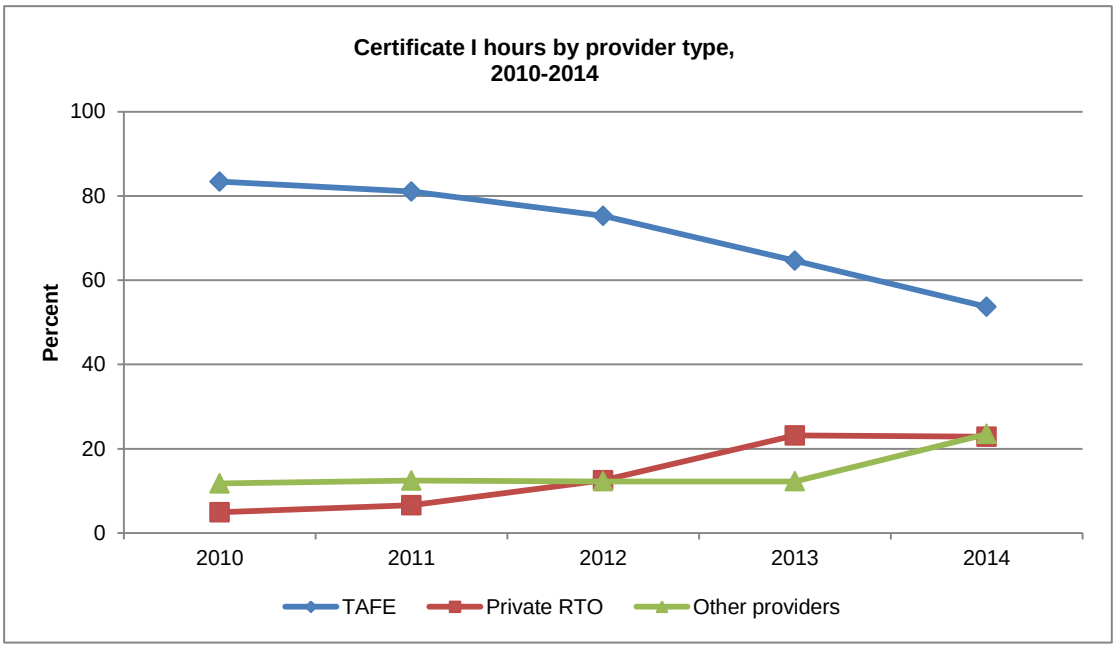


Source: National VET Provider Collection, 2010 and 2014.

We can cut the data in a different way to get an idea of the relative share of total reporting hours for each qualification held by each provider type across the five-year period. To do this, we take a percentage of the total yearly reporting hours for each separate qualification provided by TAFEs, private RTOs and 'other' RTOs and providers. In cutting the data in this way we are in a better position to tell the story for each qualification and to study the movements in shares between the providers across the time period.

Certificate I qualifications: in 2010 TAFE had just over 80% of the share of reporting hours for certificate I qualifications. This share has declined steadily across the five-year period. This decline became especially obvious in 2013, when the TAFE share fell by 20 percentage points from 2010 figures. By 2014 TAFE had lost its share by 30 percentage points. By contrast, 'other' RTOs had just over 10% of the share in 2010; this stayed relatively stable until 2014, when it increased sharply, to around 24% of the share. The trends in shares for private RTOs climbed relatively slowly at the beginning of the period, doubled in the middle of the period and doubled again in 2014. In 2010 they had just under 5% of the market share; by 2012 they had more than doubled this share and by 2013 and 2014 this had doubled again. In 2014 private RTOs had just 23% of the share of reporting hours. If we combine the shares for non-TAFE providers, we find that they held 45% of the share in 2014.

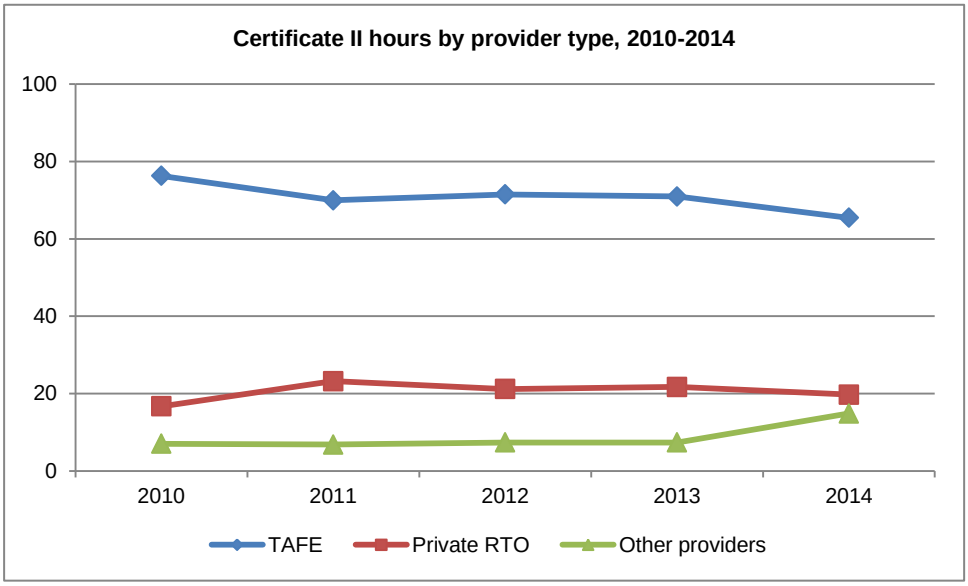
Figure 18 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14



Source: National VET Provider Collection, 2014.

Certificate II qualifications: the TAFE share of reporting hours has slowly trended downwards across the period. Those for private RTOs have fluctuated but have always stayed above those for 2010. The trend for 'other' RTOs and providers has remained relatively stable for most of the period, until 2014, when they doubled. In 2010 TAFE had just over 75% of the share of reporting hours for that year; this share dropped to around 70% for the following three years, and fell again in 2014. By contrast, the share for private RTOs in 2010 stood at around 17%; it crept upwards in 2011, but crept down slowly each year after that. In 2014 private RTOs had about 20% of the share of reporting hours for that year. Once again, the share for 'other' RTOs and providers was the lowest for each of the years. However, it remained relatively stable, at about 7% for 2010, 2011, and 2012. In 2014 its share was almost double what it had been for each of the preceding years. In 2014 the share for non-TAFE providers combined stood at around 35%.

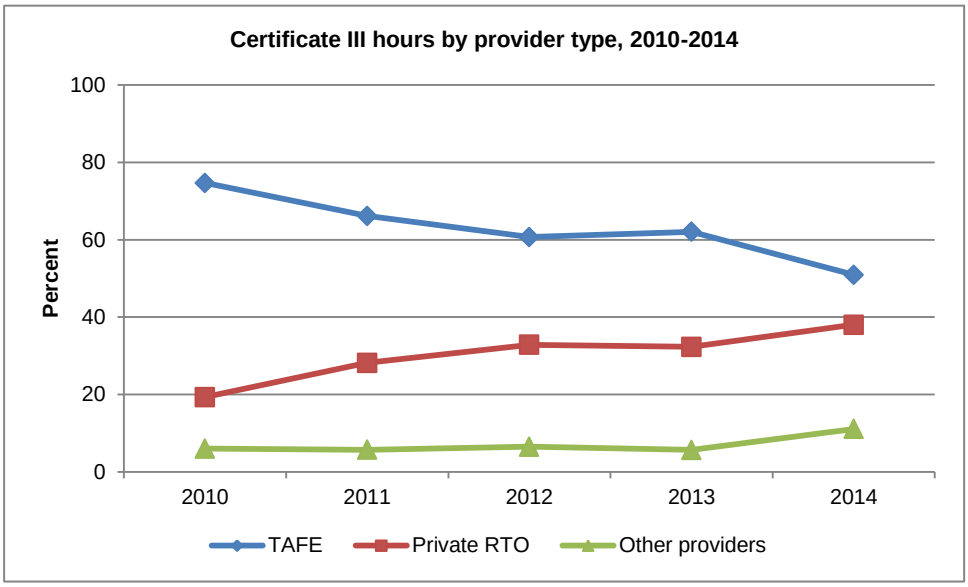
Figure 19 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14



Source: National VET Provider Collection, 2014.

Certificate III qualifications: in 2010 TAFE had almost 75% of the share of subject enrolment reporting hours for this qualification for that year. Its share dropped slowly but steadily for the next three years. By 2014 TAFE had almost 51% of the share. By contrast, the share of reporting hours for private RTOs started at just under 20% in 2010 and increased consistently each year after that. In 2014 it peaked at around 40%. The share for 'other' RTOs and providers stayed around 6% for all the years, with the exception of 2014, when it almost doubled. In 2014 the share stood at 11%. The share for non-TAFE RTOs combined was almost equal to that for TAFE (that is, about 50%).

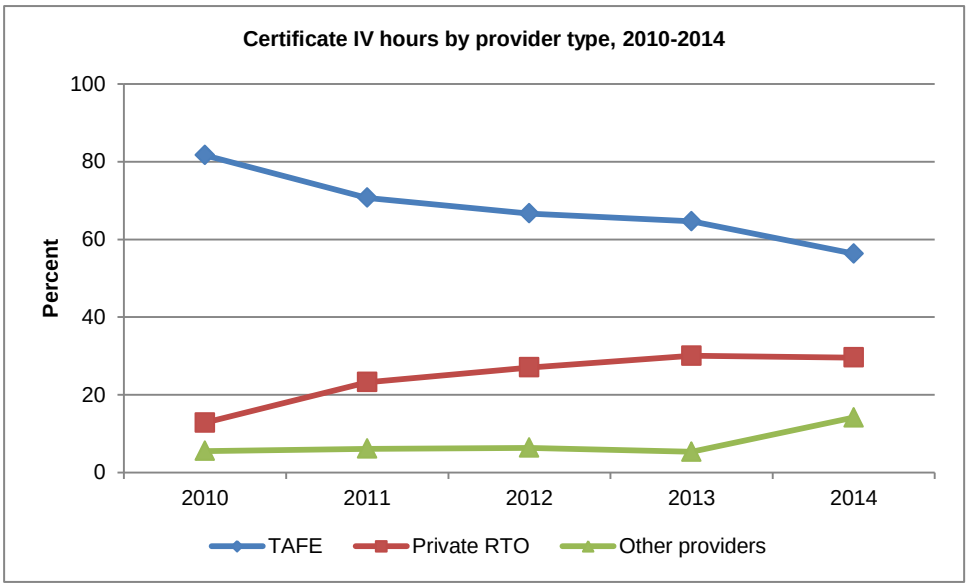
Figure 20 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14



Source: National VET Provider Collection, 2014.

Certificate IV qualifications: in 2010 TAFE had just over 80% of the total share of reporting hours for that year. Its share declined steadily for the next four years. In 2014 the TAFE share experienced a drop of 25 percentage points on the 2010 figure. The share for private RTOs has trended upwards. It started off at just under 13% in 2010, almost doubled its share the following year and steadily increased each year after that. By 2014 it had 30% of the total share of reporting hours, an increase on 2010 figures of almost 17 percentage points. The share for 'other' RTOs and providers was just under 6% in 2010; it remained relatively stable across the next three years, until it rose sharply in 2014. In 2014 it represented just below 15% of the total share of reporting hours. The share for non-TAFE RTOs and providers combined was 44% of the total. Although well below that for TAFE, it has made substantial ground.

Figure 21 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14

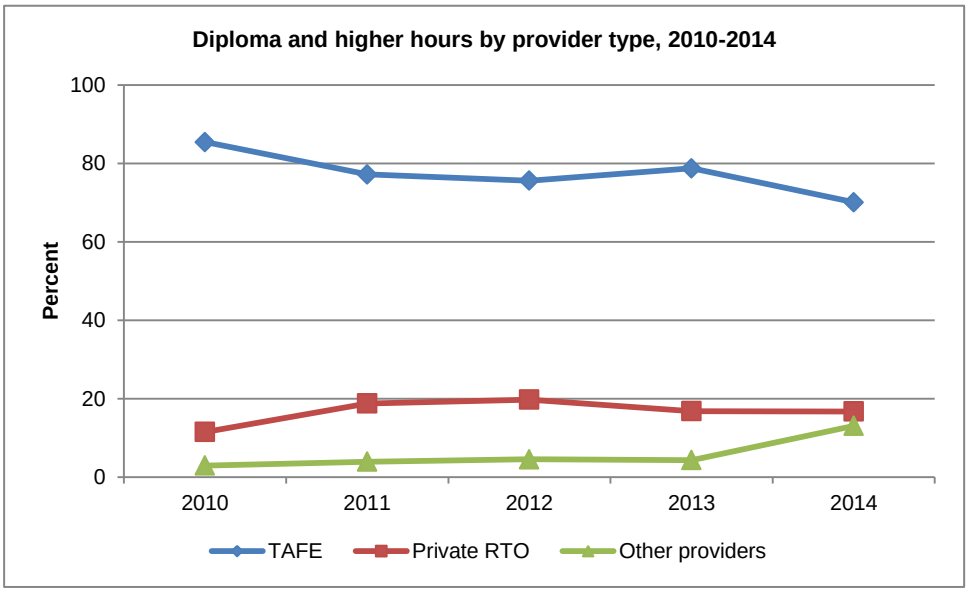


Source: National VET Provider Collection, 2014.

Diploma and higher qualifications: the TAFE share of subject enrolment hours for diploma qualifications has also been declining slowly but steadily across the period, while those for private RTOs and 'other'

RTOs and providers have generally trended upwards. In 2010 the share of TAFE reporting hours for subject enrolments in diplomas represented 86% of the total for that year; the trend generally moved downwards for four of the years, but started to climb between 2012 and 2013 to be at 70% in 2014. Between 2010 and 2014 the TAFE share had dropped by around 15 percentage points. In 2010 the private RTO share of subject enrolment hours in diploma and higher qualifications was almost 12%; by 2014 (after some minor fluctuations) it had increased to 17%. By contrast, the shares for 'other' RTOs and providers were 3% at the start of the period; they remained relatively stable across the period until 2014, when they had 13% of the market share. The non-TAFE share in 2014 stood at 30%.

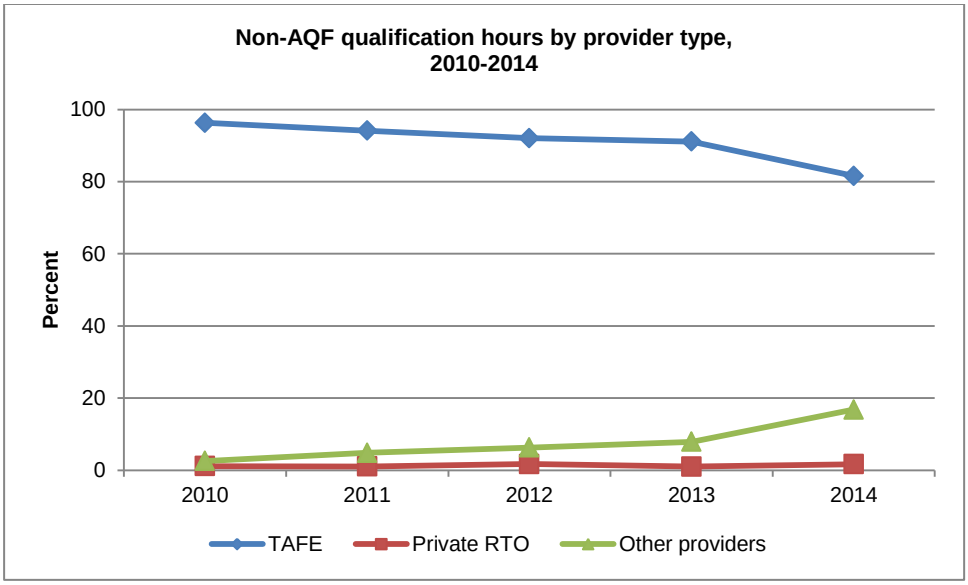
Figure 22 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14



Source: National VET Provider Collection, 2014.

Non-AQF qualifications: the trends in non-AQF programs for TAFE have also been moving downwards, most obviously between 2013 and 2014, while those for private RTOs have remained very flat and low. By comparison, the share for 'other' RTOs and providers has increased consistently (albeit from a low base). It had a sharp increase in 2014. In 2010 TAFE had 96% of the share (the highest for all the AQF qualifications and non-AQF programs) and its share remained above 90% until 2014, when it dropped substantially, but not below 80%. Private RTO shares fluctuated between 1% and 2% for the period. The shares for 'other' RTOs and providers have slowly and consistently trended upwards, with the biggest increase in 2014, when they accounted for 17% of the total.

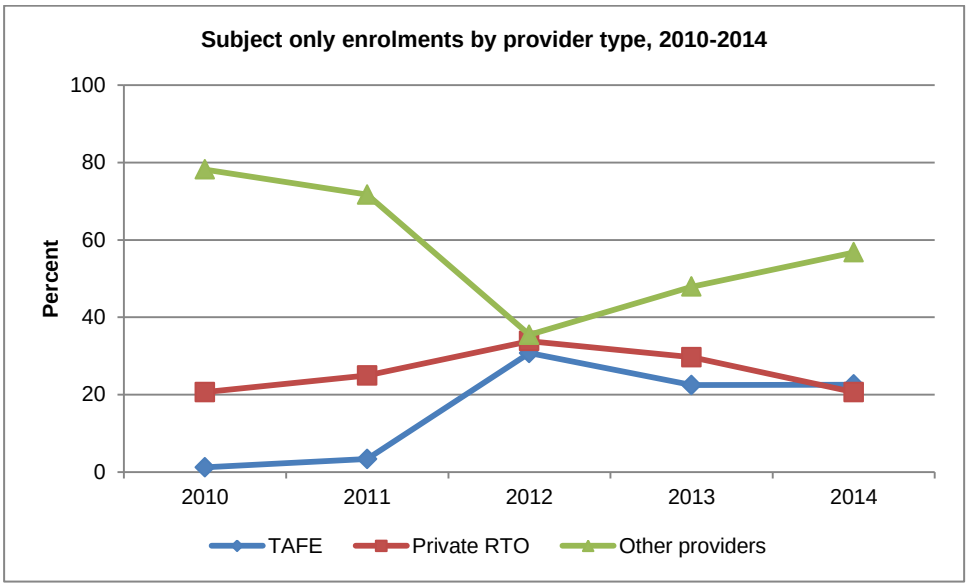
Figure 23 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14



Source: National VET Provider Collection, 2014.

Subject-only hours (no qualification): most of the market share for these hours is held by non-TAFE RTOs, and predominantly by 'other' RTOs and providers. In 2010 'other' RTOs and providers accounted for 80% of market share, while private RTOs held a fifth of the share. By contrast, the TAFE share was just over 1% in 2010; it tripled in 2011 and then increased tenfold in 2012 and stabilised at the end of the period. Where the TAFE share had steadily increased and then stabilised at around 22% at the end of the period, the 'other' RTOs and provider share had gone in the opposite direction and had begun to fall, until in 2014 it had 56% of the share. Nevertheless, the non-TAFE share stood at 76% in 2014.

Figure 24 Reporting hours for subject enrolments in government-funded VET by qualification level and provider type, 2010–14

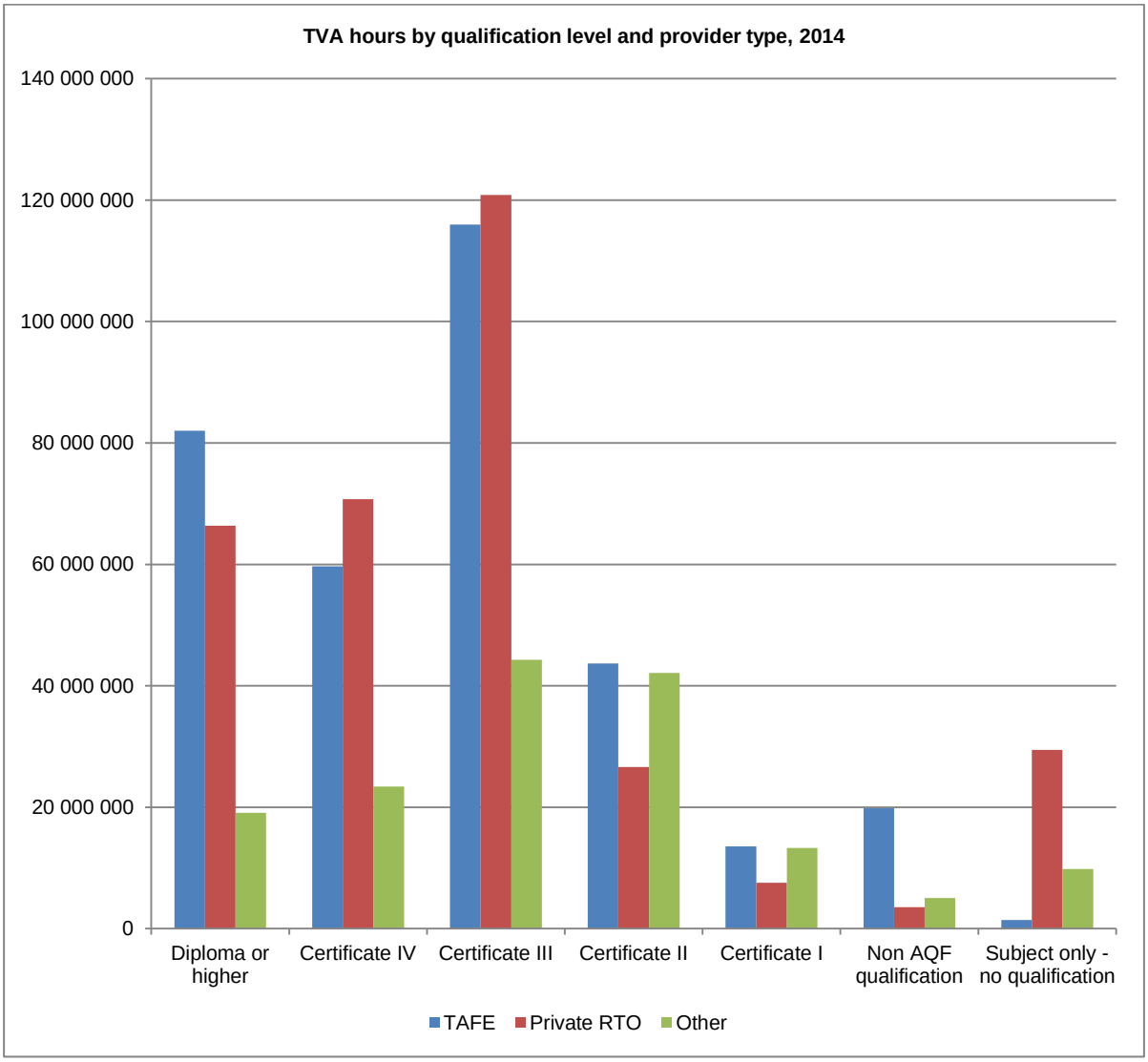


Source: National VET Provider Collection, 2014.

TVA reporting hours

In 2014 there was a total of 818 million reporting hours for subject enrolments across qualification levels and subject-only hours. They were evenly divided among those produced by TAFE and private RTOs. 'Other' RTOs produced just under a fifth of the total share.

Figure 25 Hours by qualification level by provider type, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Shares of reporting hours for different provider types

Across qualifications almost three-quarters of these total hours (74%) are accounted for by qualifications at certificate III and above levels.

Certificate I and certificate II: the same share patterns are observed for certificate I and II qualifications. 'Other' RTOs and providers and TAFE have almost equal shares of certificate I qualifications. Together they have just over three-quarters of market share. The same pattern is observed for certificate II qualifications, although the market share for TAFE and 'other' RTOs and providers stands at around 80%; private RTOs have 20% of the share.

Certificate III and certificate IV qualifications: of all the qualifications and programs delivered by private RTOs the market share for certificate III qualifications is the greatest; however, only just over that amount is reported for TAFE. When the shares for non-TAFEs are combined they have 60% of the certificate III market compared with a TAFE share of just over 40%. By contrast, private RTOs have the top share for certificate IV qualifications, just over 45% of market share. When we combine these shares with those of 'other' RTOs and providers, we find that non-TAFEs hold about 60% of the market, whereas TAFE holds just under 40%.

Diploma and above: although TAFE holds almost 50% of the share for diploma and higher qualifications, well above that held separately by private RTOs (40%), when the shares for non-TAFE RTOs are combined, they surpass those for TAFE by a small margin.

Non-AQF qualifications: TAFE has almost 70% of the share for non-AQF qualifications, far in excess of that for private RTOs and 'other' RTOs and providers. Even when the shares of the non-TAFEs are combined, the TAFE share surpasses it by around 40 percentage points.

Subject-only: the greatest proportion of reporting hours for subject-only activity, where no qualification is awarded, is reported for private RTOs, who hold almost three-quarters of the market share.

Program enrolments by field of education

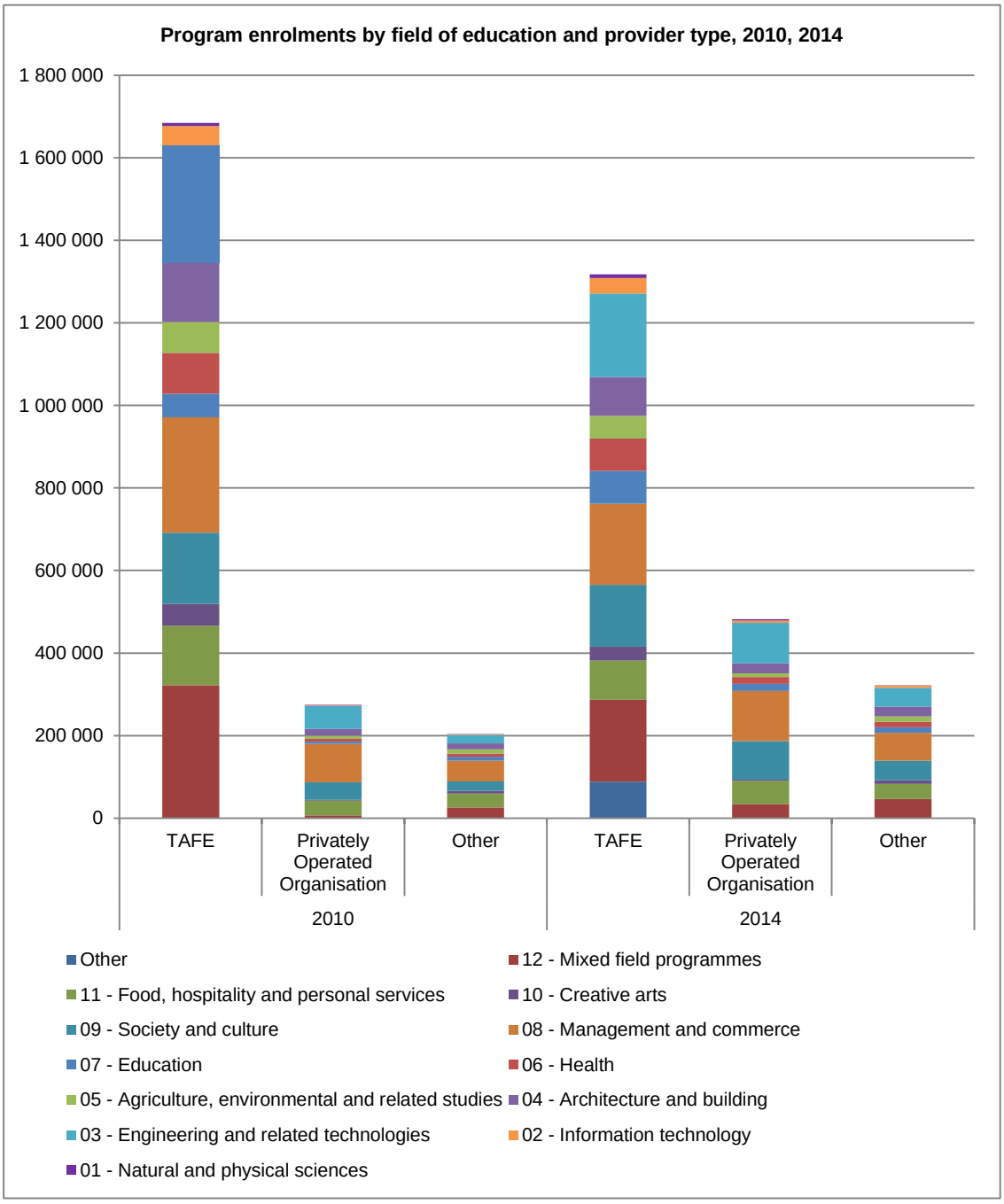
Government-funded training

In 2010 there were almost 2.2 million publicly-funded program enrolments across all types of public and private RTOs in various fields of education; by 2014 this figure had remained relatively stable, although there had been a very slight drop. In 2010 the overwhelming majority of all enrolments for FOEs (almost 80%) were those delivered by TAFE. This situation persisted in 2014, but the share for TAFE had dropped substantially (to just over 60%). Where private RTOs had around 13% of the share of total FOE enrolments in 2010, they had almost doubled their share in 2014. For 'other' RTOs and providers, the share jumped dramatically and accounted for 15%. In 2010 it had accounted for just 0.3% of the share.

This shows that private-sector RTOs, as well as TAFE, are benefiting from the government focus on skills reform and its funding for students to enrol in training. Despite these benefits for both sectors, the data show that, overall, the amount of publicly-funded training for enrolments in TAFE has been decreasing, while that for private providers has generally been increasing. Some of these effects may be the result of various governments implementing entitlement models of training, whereby students are entitled to qualifications at a certain level and in designated areas of social and economic importance to the state or territory.

In 2010 the greatest proportion of total FOE enrolments was in management and commerce, followed by engineering and related technologies; mixed field programs; and society and culture. Food, hospitality and personal services and architecture and building accounted for the next highest percentages. In 2014 this pattern was generally repeated. With the exception of society and culture, information technology, education, and natural and physical sciences, all other FOEs experienced a slight drop.

Figure 26 Number of program enrolments in government-funded VET by field of education and provider type



Source: National VET Provider Collection, 2010 and 2014.

We can examine the shift in the share of publically funded training for TAFE and private RTOs by looking at the movement of enrolments for FOEs over the last five years. We find that the greatest proportions of total FOE enrolments were accounted for by those FOEs delivered by TAFE. In 2010 the greatest proportion of total FOE enrolments occurred for mixed field programmes delivered by TAFE, closely followed by FOEs in engineering and related technologies and management and commerce. FOEs for society and culture, food, hospitality and personal services and architecture and building delivered by TAFE were the next highest proportions. By 2014 the highest proportions of all FOE enrolments were for the same FOEs and were also those delivered by TAFE.

By comparison with 2010 figures, the share of total FOE enrolments for TAFE in 2014 had dropped by almost 16%. By contrast, that for private RTOs had almost doubled; for 'other' RTO's and providers the share increased dramatically from 0.3% to 15%.

Table 5 Shares of total FOE program enrolments in government-funded VET by provider type and FOE, 2010, 2014 (%)

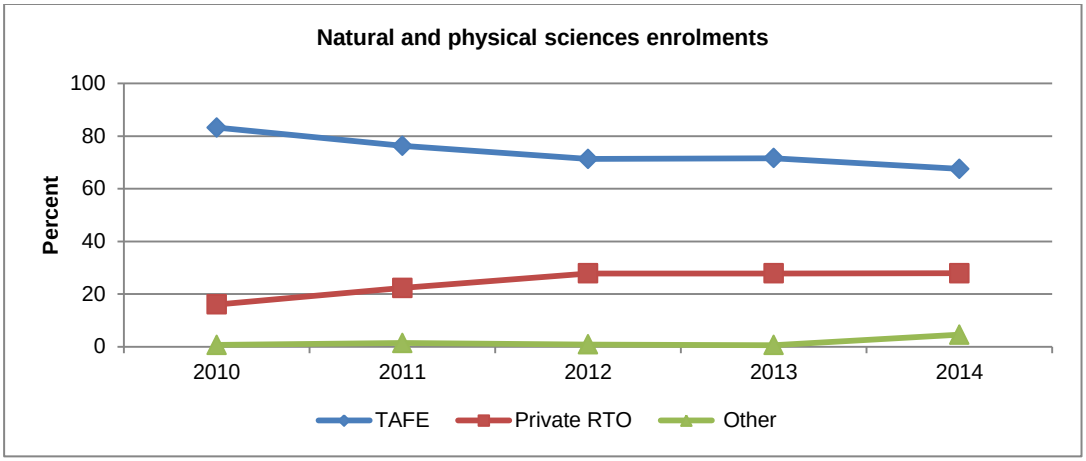
	2010				2014			
	TAFE	Private RTOs	Other	Total	TAFE	Private RTOs	Other	Total
01 - Natural and physical sciences	0.3	0.1	0.0	0.4	0.4	0.2	0.0	0.6
02 - Information technology	2.2	0.1	0.0	2.3	1.8	0.2	0.3	2.3
03 - Engineering and related technologies	13.3	2.6	0.8	16.7	9.6	4.6	2.0	16.3
04 - Architecture and building	6.7	0.7	0.6	8.1	4.5	1.2	1.1	6.7
05 - Agriculture, environmental and related studies	3.6	0.4	0.4	4.3	2.6	0.4	0.6	3.6
06 - Health	4.6	0.3	0.3	5.3	3.7	0.8	0.6	5.1
07 - Education	2.7	0.2	0.4	3.3	3.8	0.8	0.6	5.2
08 - Management and commerce	13.1	4.3	2.2	19.5	9.4	5.7	3.1	18.2
09 - Society and culture	8.1	2.0	0.9	11.0	7.2	4.4	2.1	13.7
10 - Creative arts	2.5	0.1	0.3	2.9	1.6	0.1	0.4	2.1
11 - Food, hospitality and personal services	6.8	1.7	1.4	9.9	4.5	2.7	1.7	8.9
12 - Mixed field programmes	15.0	0.3	1.1	16.4	9.4	1.6	2.1	13.1
Other					4.2	0.0	0.0	4.2
Total	78.7	12.7	0.3	100.0	62.7	22.7	14.6	100.0

Source: National VET Provider Collection, 2010 and 2014.

Shares of FOE program enrolments for each type of provider

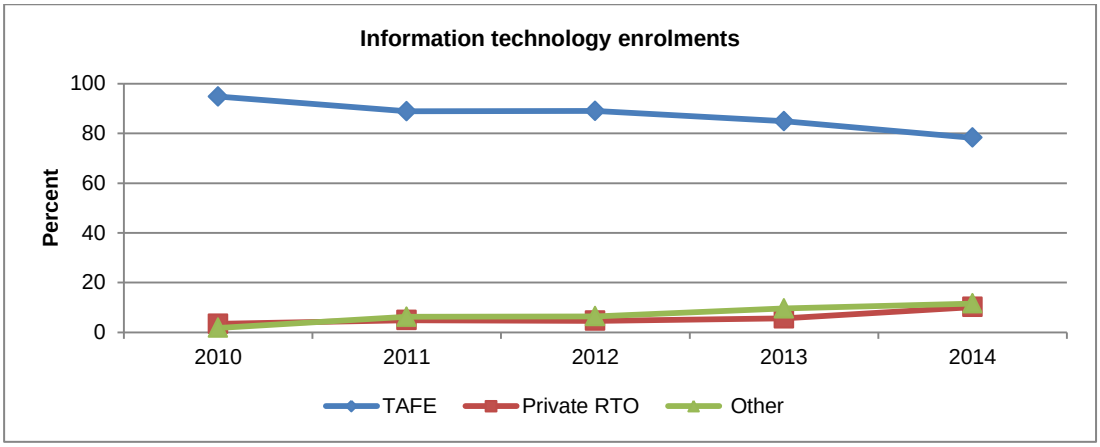
Shares of FOE enrolments between 2010 and 2014 for TAFE, private RTOs and 'other' RTOs can give us a better picture of market share at the individual FOE level. Across all FOEs, TAFE continues to have the greatest market share by comparison with private RTOs and 'other' RTOs. However, its share of FOE enrolments has dropped consistently and substantially for all FOEs. By contrast, the shares for each of the FOEs generally have trended upwards for private RTOs and 'other' RTOs. The upward trend was often more significant in 2014 than in other years, especially for 'other' RTOs and providers.

Figure 27 Shares of program enrolments in natural and physical sciences in government-funded VET by provider type, 2010–14



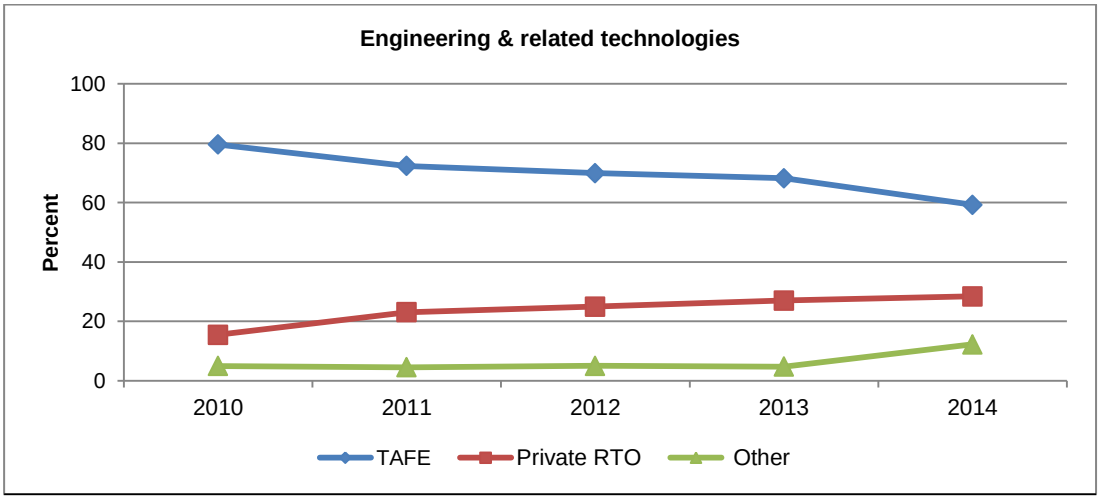
Source: National VET Provider Collection, 2014.

Figure 28 Shares of program enrolments in information technology in government-funded VET by provider type, 2010–14



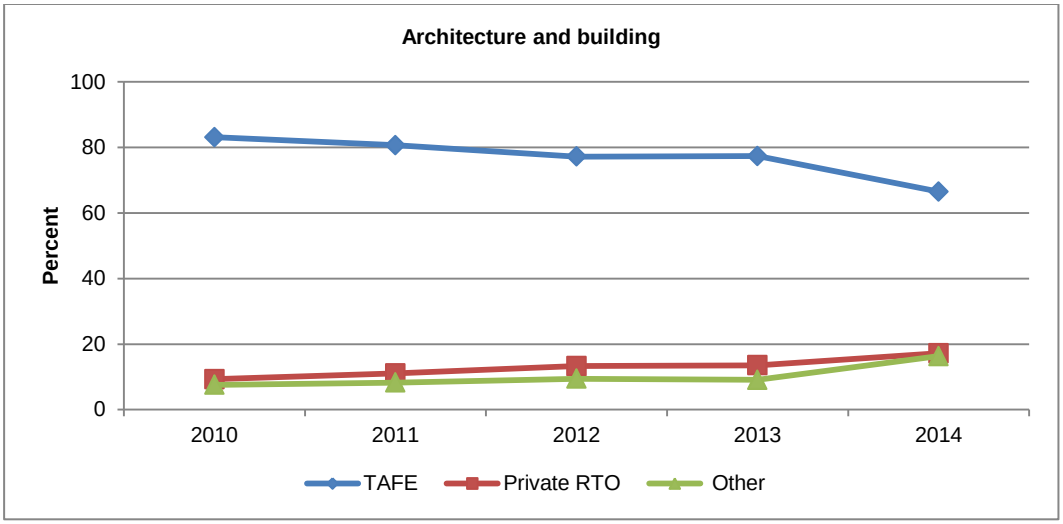
Source: National VET Provider Collection, 2014.

Figure 29 Shares of program enrolments in engineering and related technologies in government-funded VET by provider type, 2010–14



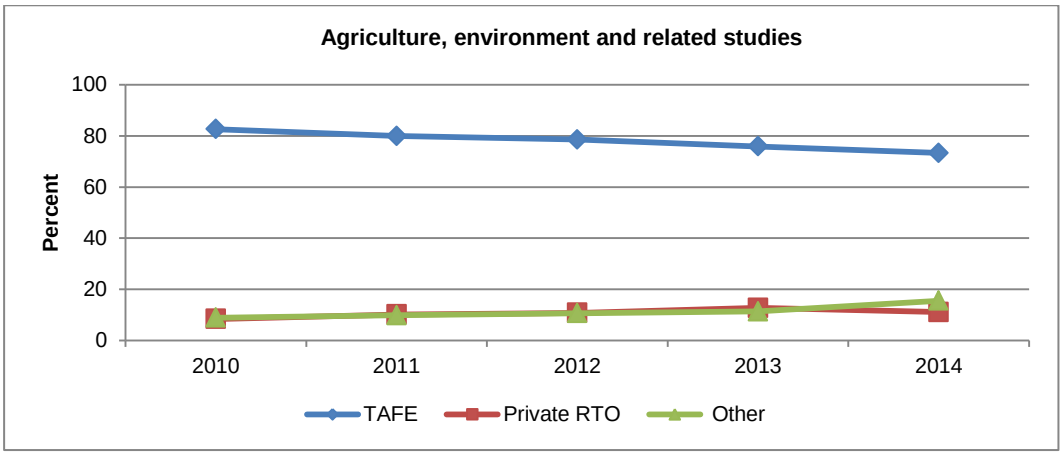
Source: National VET Provider Collection, 2014.

Figure 30 Shares of program enrolments in architecture and building in government-funded VET by provider type, 2010–14



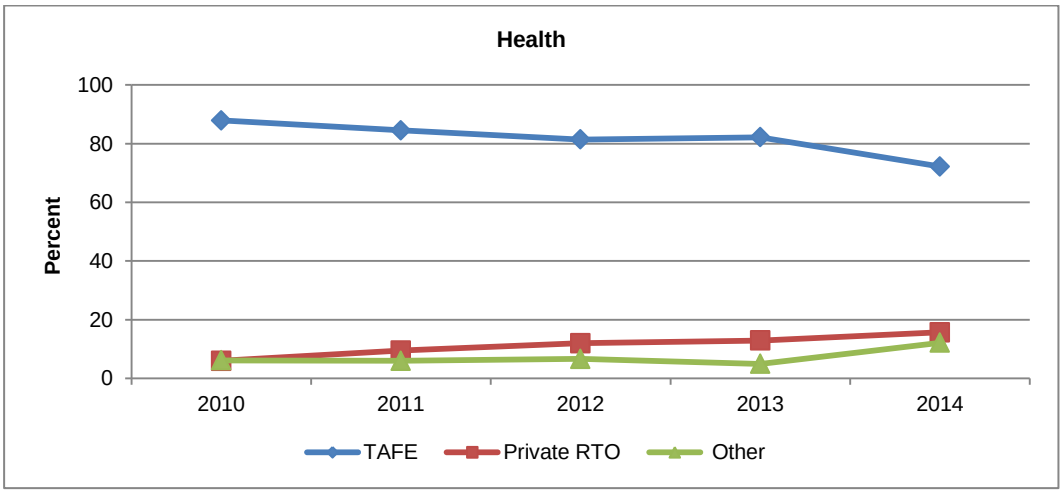
Source: National VET Provider Collection, 2014

Figure 31 Shares of program enrolments in agriculture, environment and related studies in government-funded VET by provider type, 2010–14



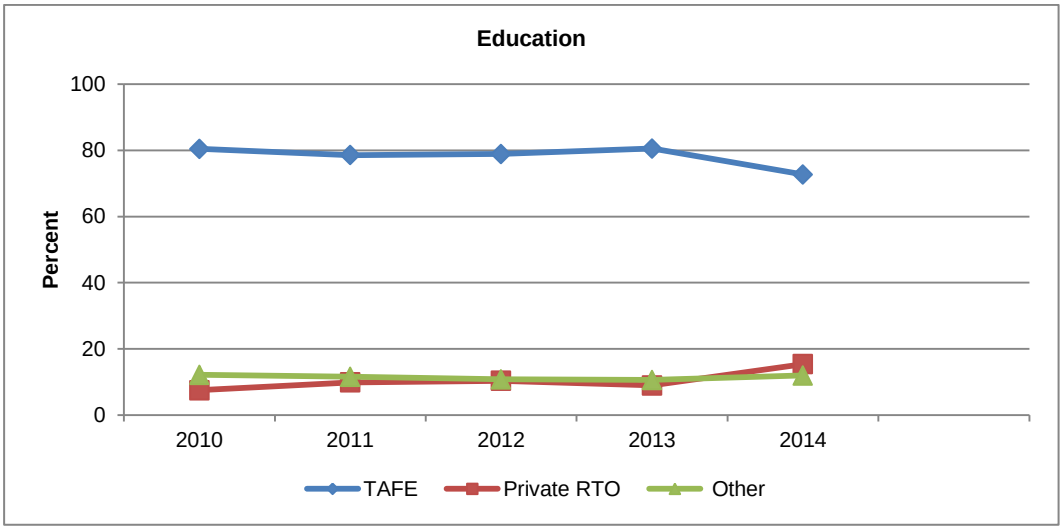
Source: National VET Provider Collection, 2014.

Figure 32 Shares of program enrolments in health in government-funded VET by provider type, 2010–14



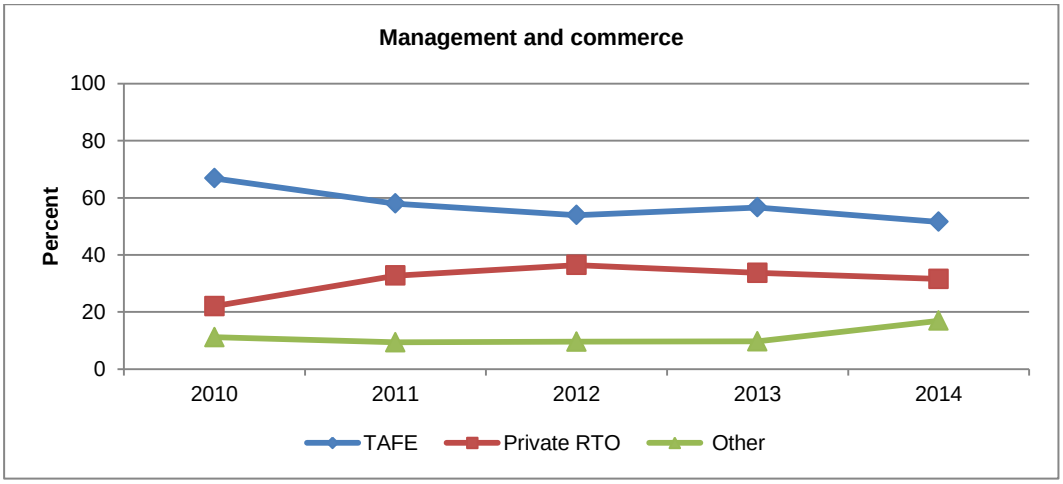
Source: National VET Provider Collection, 2014.

Figure 33 Shares of program enrolments in education in government-funded VET by provider type, 2010–14



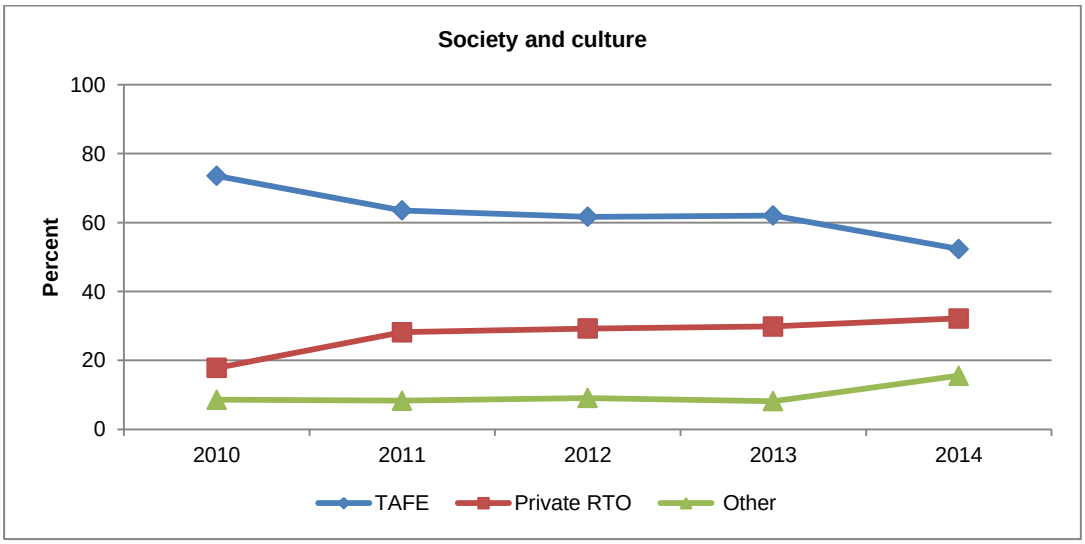
Source: National VET Provider Collection, 2014.

Figure 34 Shares of program enrolments in management and commerce in government-funded VET by provider type, 2010–14



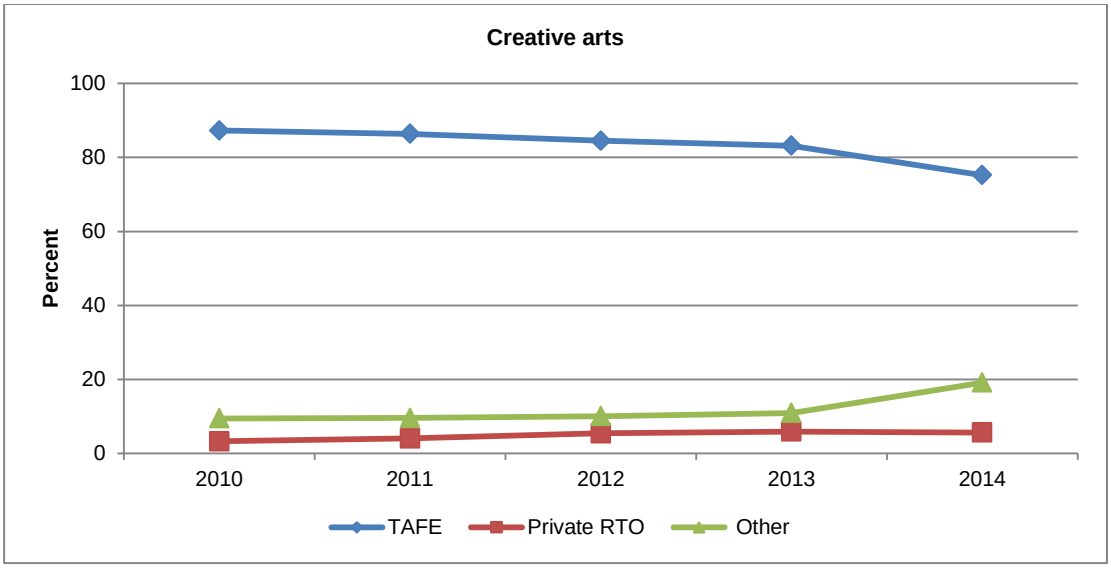
Source: National VET Provider Collection, 2014.

Figure 35 Shares of program enrolments in society and culture in government-funded VET by provider type, 2010–14



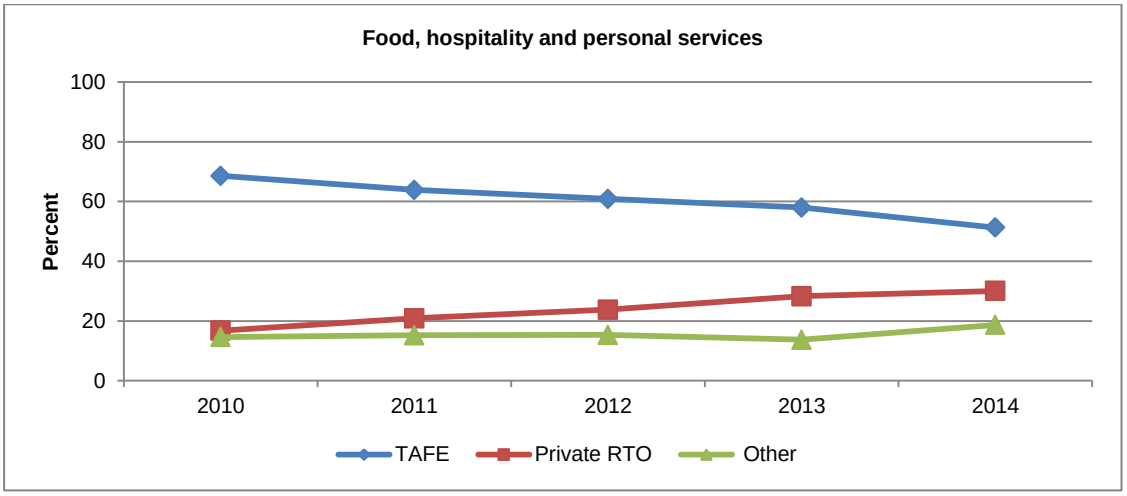
Source: National VET Provider Collection, 2014.

Figure 36 Shares of program enrolments in creative arts in government-funded VET by provider type, 2010–14



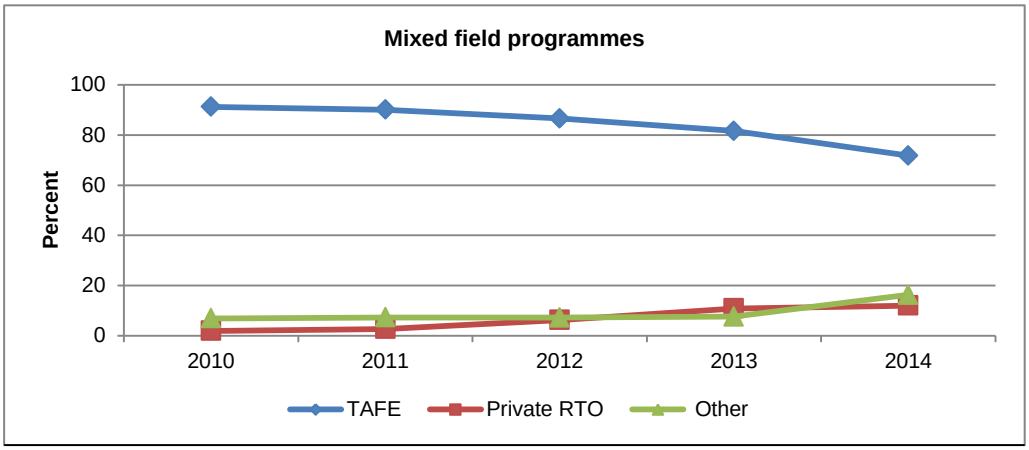
Source: National VET Provider Collection, 2014.

Figure 37 Shares of program enrolments in food, hospitality and personal services in government-funded VET by provider type, 2010–14



Source: National VET Provider Collection, 2014.

Figure 38 Shares of program enrolments in mixed field programmes in government-funded VET by provider type, 2010–14



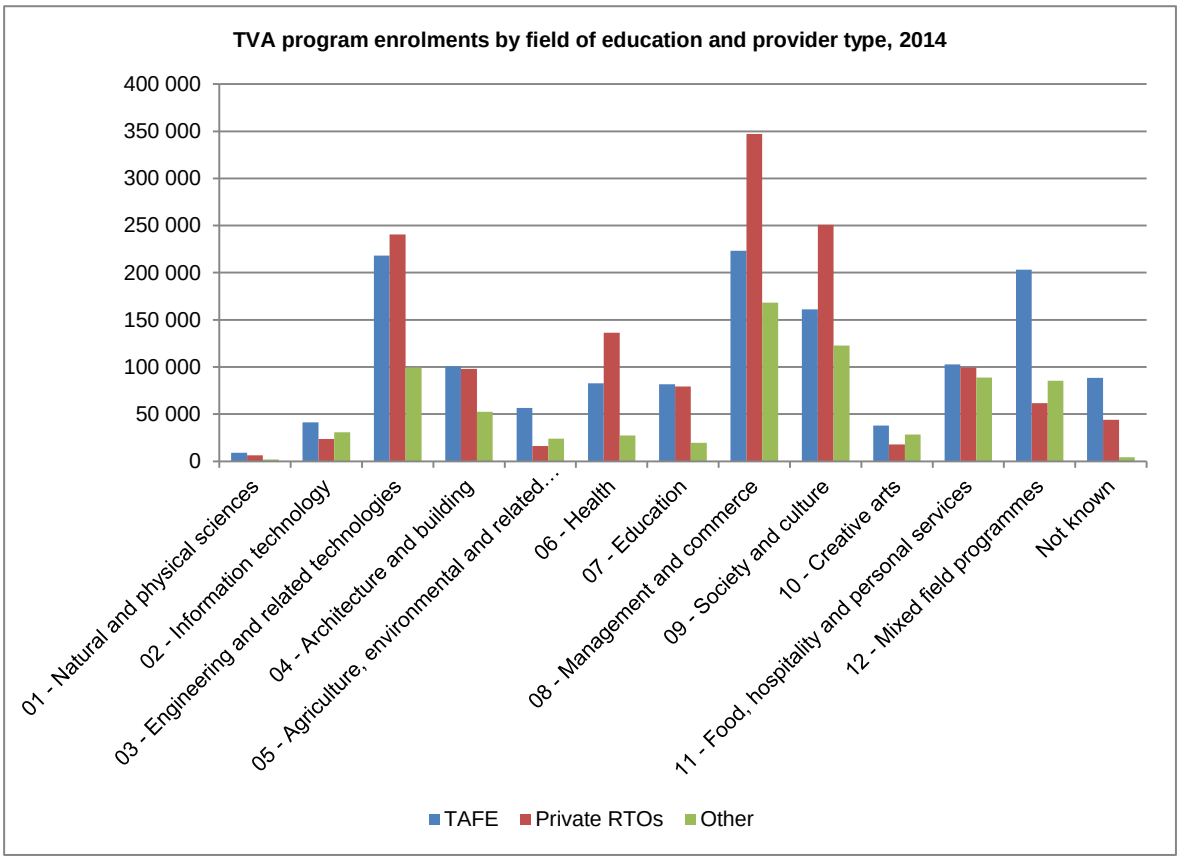
Source: National VET Provider Collection, 2014.

TVA program enrolments by FOE

In 2014 the three top fields of education were management and commerce, engineering and related technologies, and society and culture. The most enrolments for all RTO types were in management and commerce; for TAFE and private providers these were followed by engineering and related technologies, while for 'other' RTOs and providers it was followed by society and culture.

For TAFE the third most common FOE was in mixed field programmes; for private providers it was in society and culture, and for 'other' RTOs and providers it was in engineering and related technologies.

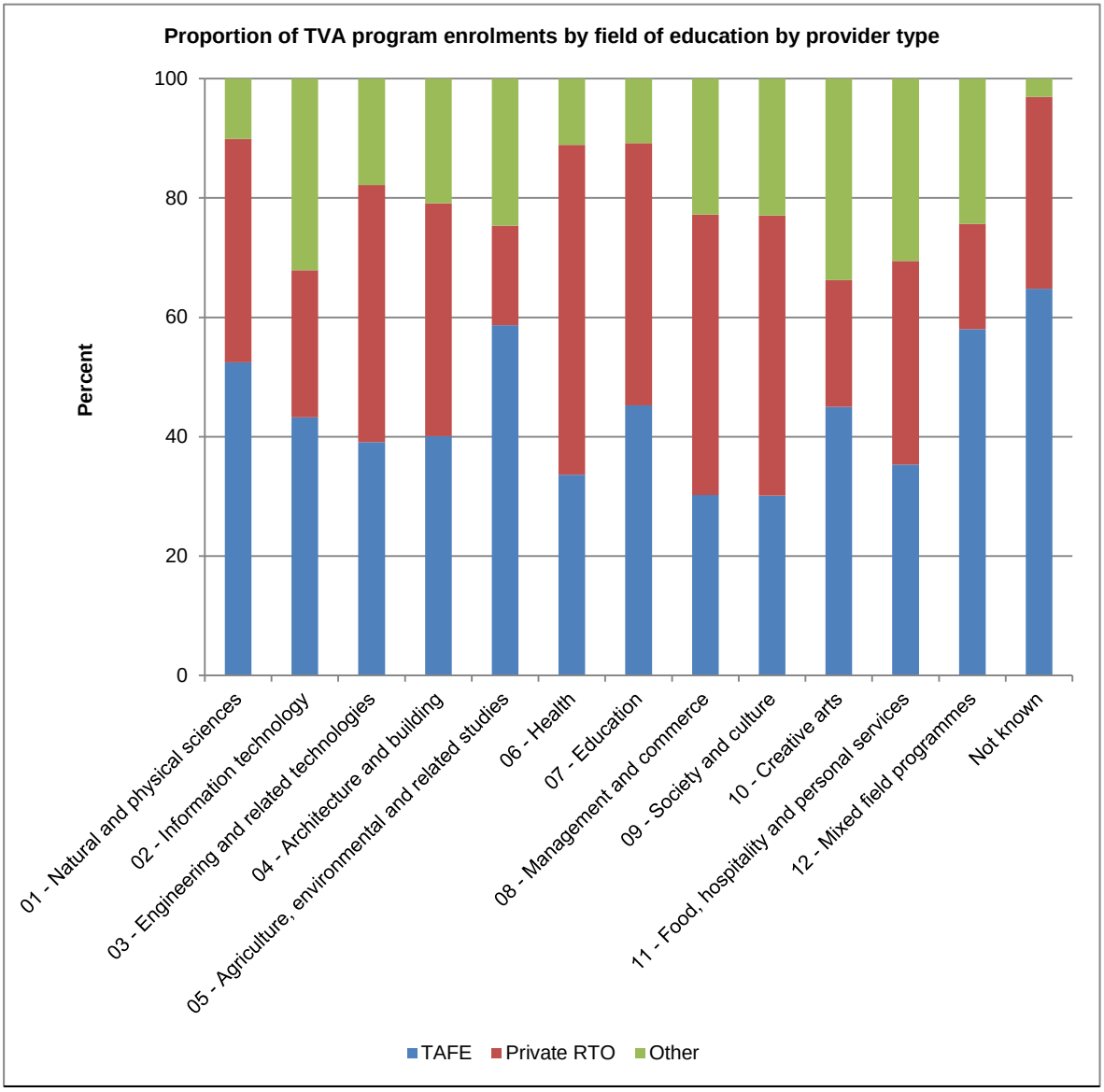
Figure 39 Numbers of enrolments by FOE and by provider type, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

When we look at the separate market shares for each of the types of providers for each field of education we find that TAFE's share is the most substantial for five of the 12 FOEs and includes agriculture, environmental and related studies (58%); natural and physical sciences (52.5%); creative arts (45%); mixed field programmes (58%); and information technology (43%). However, private RTOs have a substantial part of the market in health (55%); society and culture (47%); and management and commerce (47%). When we compare non-TAFEs as a whole, we can see that their share then surpasses that for TAFE for all but three of the FOEs: natural and physical sciences; agriculture, environmental and related studies; and mixed field programmes.

Figure 40 Shares of enrolments by FOE and by provider type, TVA 2014 (%)



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Reporting hours for fields of education – subject enrolments

Government-funded training

In 2010 there was a total of almost 467 million reported hours for subject enrolments across all fields of education (FOE) for all sectors combined. Of these, around 80% were accounted for by TAFE providers, and 14.1% by private RTOs. The remainder was accounted for by a mix of 'other' RTOs and providers. By 2014 the reported hours had increased across the board to around 523 million, but they had not increased from 2010 figures for TAFE. TAFE's market share had dropped by about 20 percentage points.

The big winners in terms of FOE subject enrolment reporting hours were the non-TAFE providers, with private RTOs doubling their share in 2014 and 'other' RTOs and providers adding approximately another four percentage points. Private RTOs now accounted for 29% of the reported hours, and 'other' RTOs and providers accounted for 10% of reported hours. In 2010 the highest number of reported hours overall was represented by management and commerce, engineering and related technologies, society and culture, and mixed field programmes. In 2014 the pattern was generally similar, with only some minor movement. Management and commerce, followed by society and culture, and then engineering and related technologies and mixed field programmes represented the FOEs with the highest number of reported hours.

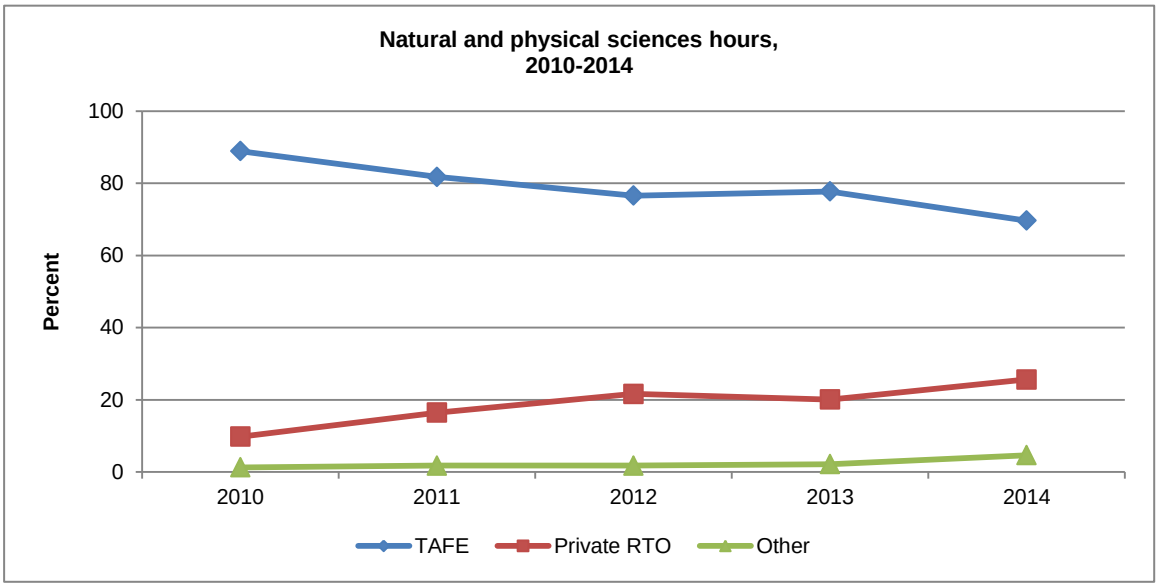
In 2010 the highest proportion of total FOE subject enrolment hours was management and commerce delivered by TAFE. By 2014 management and commerce had reduced its share of total FOE subject enrolment hours by six percentage points. It was also delivered by TAFE and held top place.

The second highest proportion of total FOE subject enrolment hours in 2010 was mixed field programmes delivered by TAFE. In 2014 this FOE had dropped to fourth place, slightly behind society and culture and behind engineering and related technologies, also delivered by TAFE.

When we look at separate market shares for each field of education by provider type we find the following.

Natural and physical sciences: TAFE's share of reporting hours for enrolments at the subject level have generally trended downwards, while those for the other two provider types have gone in the opposite direction. In 2010 TAFE had almost 90% of the share; by 2014 it had lost around 20 percentage points. The share for private providers was a tenth of what they were for TAFE in 2010 but by 2014 they had almost tripled. Those for 'other' RTOs remained more stable but had crept up slowly. In 2010 they were just 1%; by 2014 this had increased fourfold. The non-TAFE RTOs and provider accounted for 30% of market share.

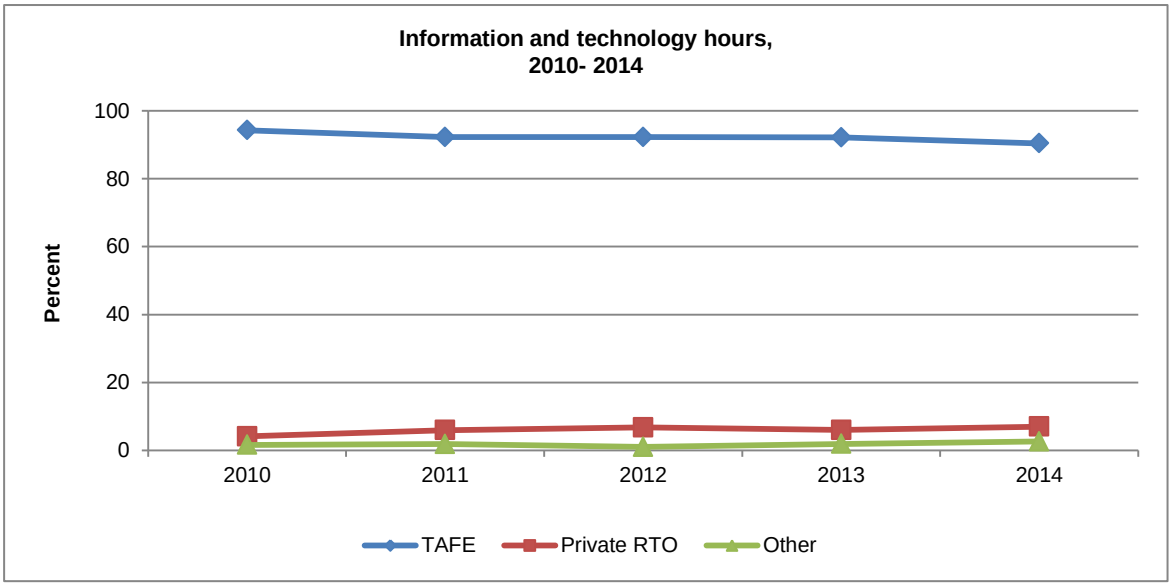
Figure 41 Shares of subject enrolment reporting hours for natural and physical sciences in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Information technology: the shares for information technology for TAFE generally stayed relatively stable throughout the period. They dropped slightly in 2014; however, they remained around the 90% mark. Similarly, but at a fraction of the level of the TAFE share, that for private RTOs also stayed relatively stable across the period; however, there were some fluctuations in the number of reported hours. The share for 'other' RTOs and providers was even smaller than that for private RTOs, at 3% in 2014. Together non-TAFE shares accounted for around 10% of the share.

Figure 42 Shares of subject enrolment reporting hours for information technology in government-funded VET by provider type, 2010–14 (%)

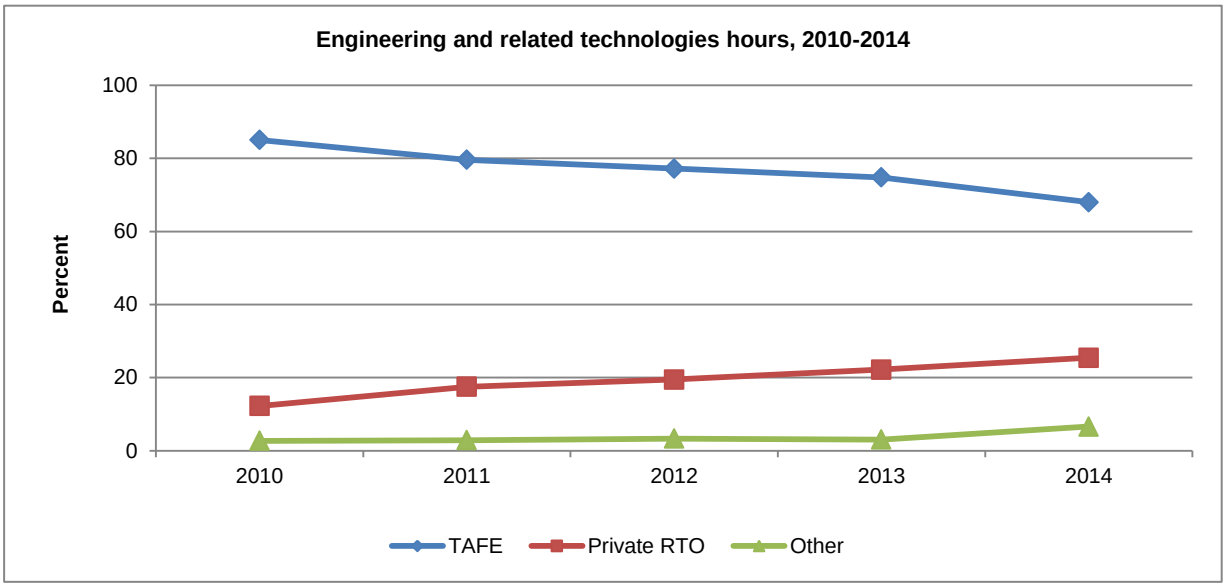


Source: National VET Provider Collection, 2014.

Engineering and related technologies: the shares for engineering and related technologies for TAFE have consistently moved downwards across the period, being at almost 70% of market share for 2014. Those for private providers crept up slowly and in 2014 they were more than twice what they were in 2010, at 25%. Similarly for 'other' RTOs and providers; however, their share in 2014 was about a quarter of that for

private providers. Together non-RTOs had around 32% of the share, with most of the market share losses for TAFE being picked up by private RTOs.

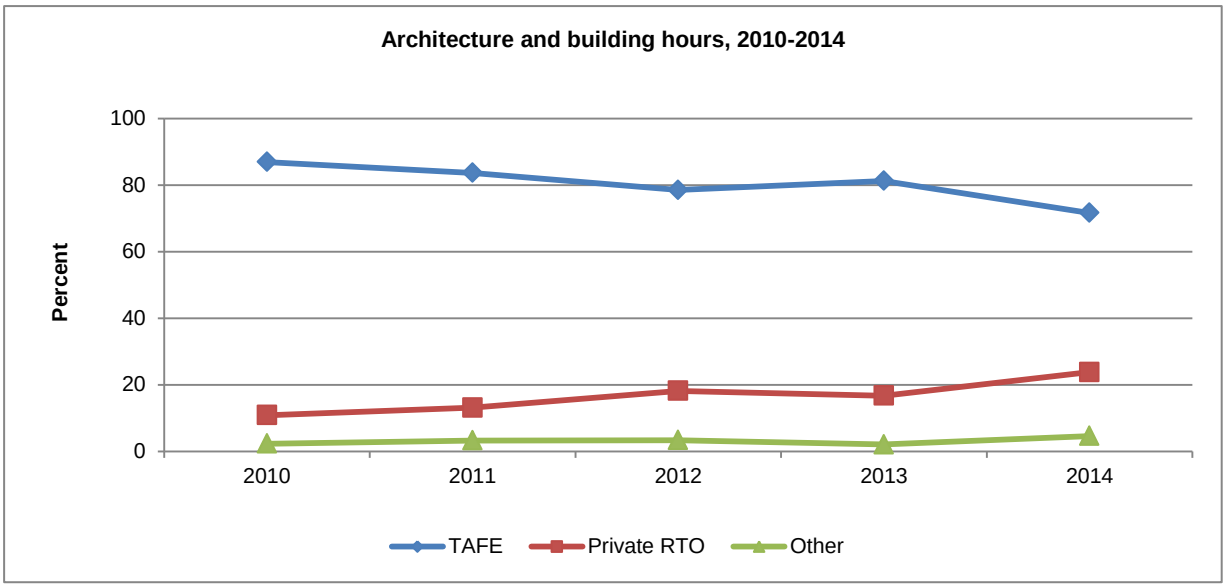
Figure 43 Shares of subject enrolment reporting hours for engineering and related technologies in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Architecture and building: the trend in TAFE shares of the reporting hours market in these subjects generally trended downwards, with a substantial drop in 2014, after it had rallied in 2013. By comparison in 2010, it had 87% of the market, by 2014 the share had dropped 14 percentage points. By contrast, the shares of the other two groups have generally gone in the opposite direction. In 2010 private providers started at 11%, and then crept up slowly, slightly dropping in 2013, and recovering another seven percentage points in 2014. The 2014 share was double the share of 2010. The pattern for 'other' RTOs and providers was similar. The trend moved slowly upwards, the 2010 share doubling in 2014. The combined total for non-TAFE RTOs was just under 30%.

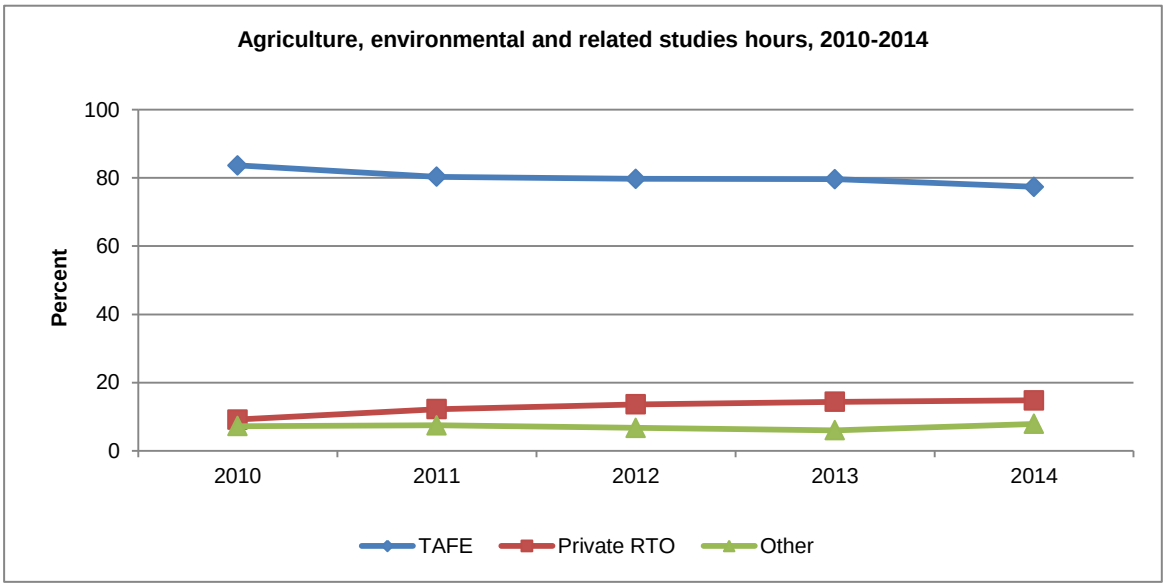
Figure 44 Shares of subject enrolment reporting hours for architecture and building in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Agriculture, environmental and related studies: starting at just under 84%, TAFE's share has also fallen slowly across the period, while that for private RTOs and 'other' RTOs and providers has increased slowly upwards. Where TAFE had 77% of market share in 2014, the percentage for non-TAFE providers combined was just over 20%.

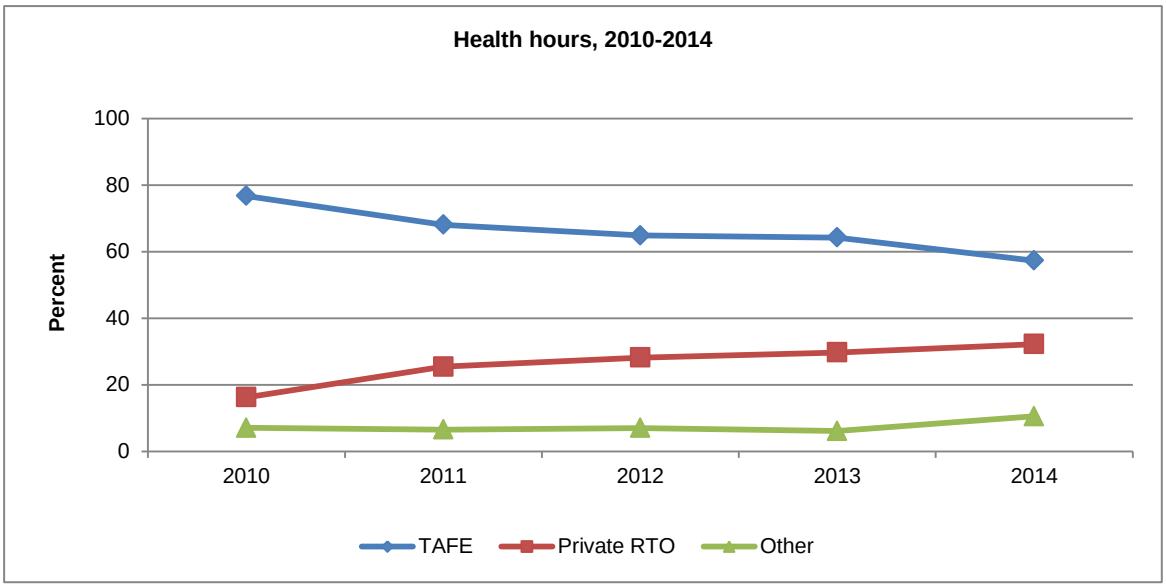
Figure 45 Shares of subject enrolment reporting hours for agriculture, environmental and related studies in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Health: the downward trend for TAFE in subject reporting hours shares and upwards trend for those for private providers is also observed for health. In 2010, TAFE had 77% market share; however, the TAFE share had fallen by around 20 percentage points in 2014, while that for private providers had doubled to 32%. The trend for 'other' RTOs and providers remained relatively flat, but in 2014 it crept up slowly and added another three percentage points to its 2010 figure. In 2014 its share was 10%. In 2014 non-TAFE RTOs and providers had captured 42% of the market.

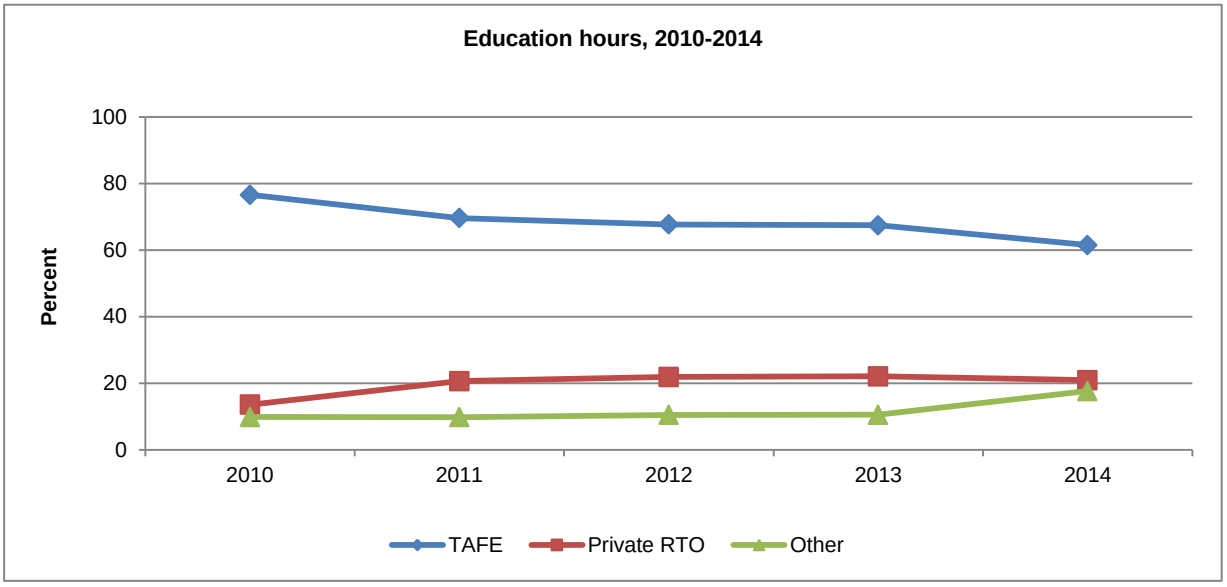
Figure 46 Shares of subject enrolment reporting hours for health in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Education: the trend for FOE subject enrolment reporting hours for education has steadily fallen for TAFE and generally increased for the non-TAFE providers over the period. In 2010 TAFE had 77% of market share. By comparison, private providers had 14%; and 'other' RTOs and providers had 10%. Where in 2014 the TAFE share dropped 15 percentage points, the share for the others two groups moved in the opposite direction. Shares for 'other' RTOs and providers have remained relatively constant across the period, only experiencing a jump in 2014. In 2014 non-TAFE providers held just under 40% of the market share.

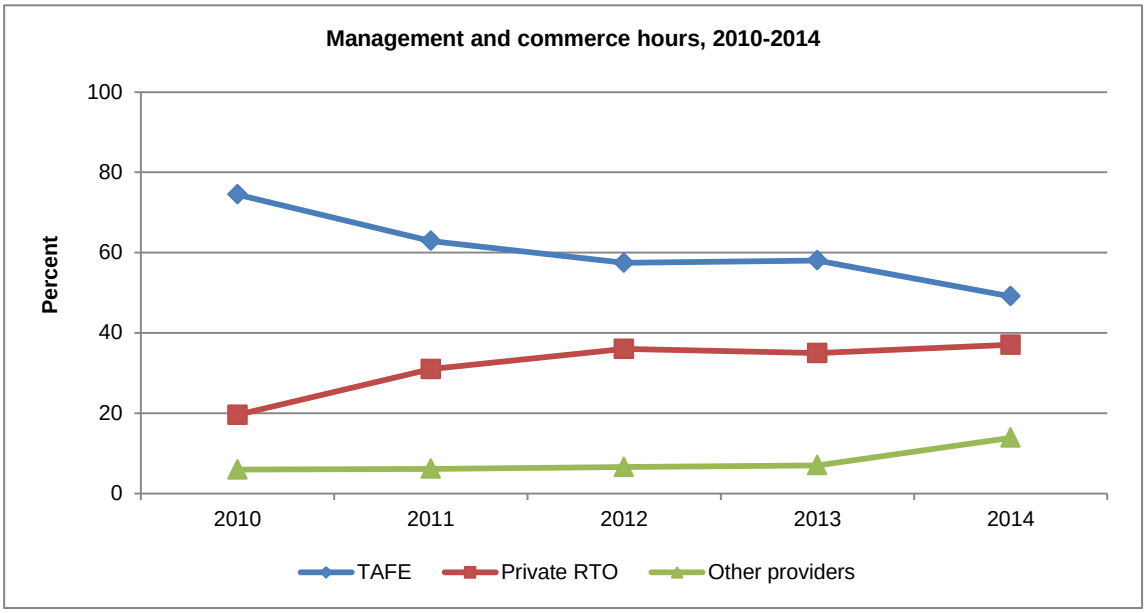
Figure 47 Shares of subject enrolment reporting hours for education in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Management and commerce: in 2010 the shares for TAFE started out at 75% of the total compared with 20% held by private providers and 6% by 'other' RTOs. Across the four years, the TAFE share has been consistently dropping, while that for private providers has been steadily moving upwards. By 2014 TAFE had just over half of the market share, while the combined total for non-TAFE RTOs and providers was just under half. Across the period private RTOs had added almost 20 percentage points to their share of the market. The jump for 'other' RTOs and providers was just six percentage points.

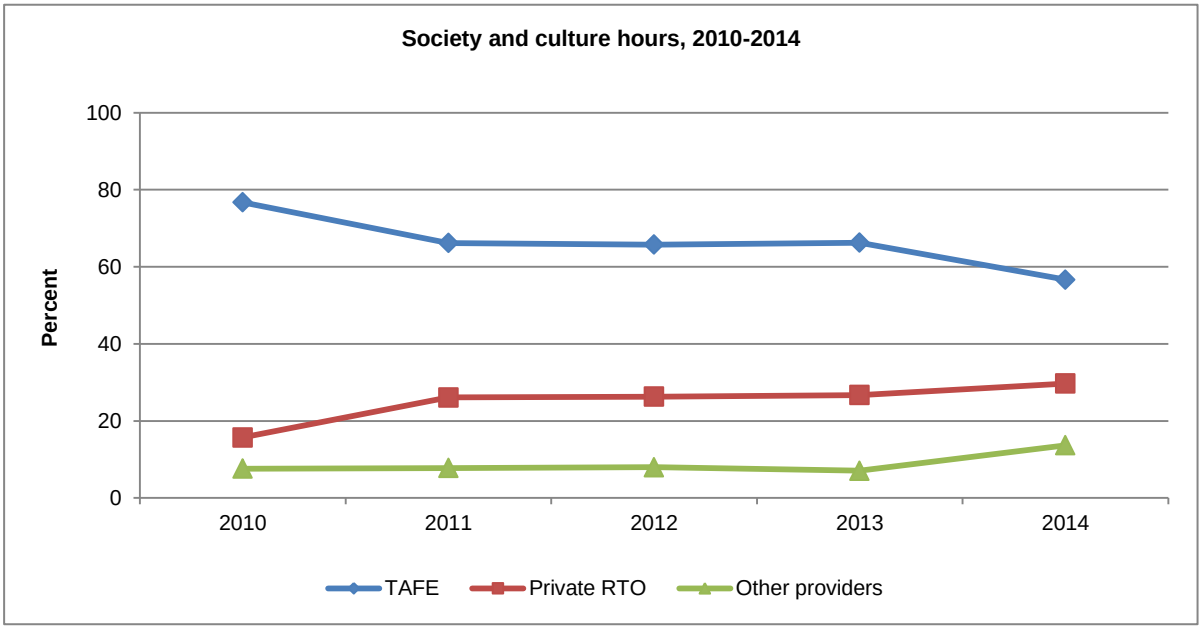
Figure 48 Shares of subject enrolment reporting hours for management and commerce in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Society and culture: there has been less movement in TAFE shares of subject reporting hours here, although in the middle of the period its share remained relatively flat, to substantially fall away again at the end of the period. For private RTOs the trend has been in the opposite direction and although it jumped substantially at the beginning of the period, it remained relatively stable in the following three years and had a slight increase in 2014. By contrast, the trend for 'other' RTOs and providers has remained relatively flat for most of the period, having a slight increase at the end of the period. Where in 2010 TAFE had 77% of the market share, by 2014 this had fallen to below 60%. By comparison, the share for private RTOs had doubled, from a starting point of 16% in 2010. 'Other' RTOs and providers had just 7% of the market share in 2010 but by 2014 had around 10%. The combined share for non-TAFEs was 41%.

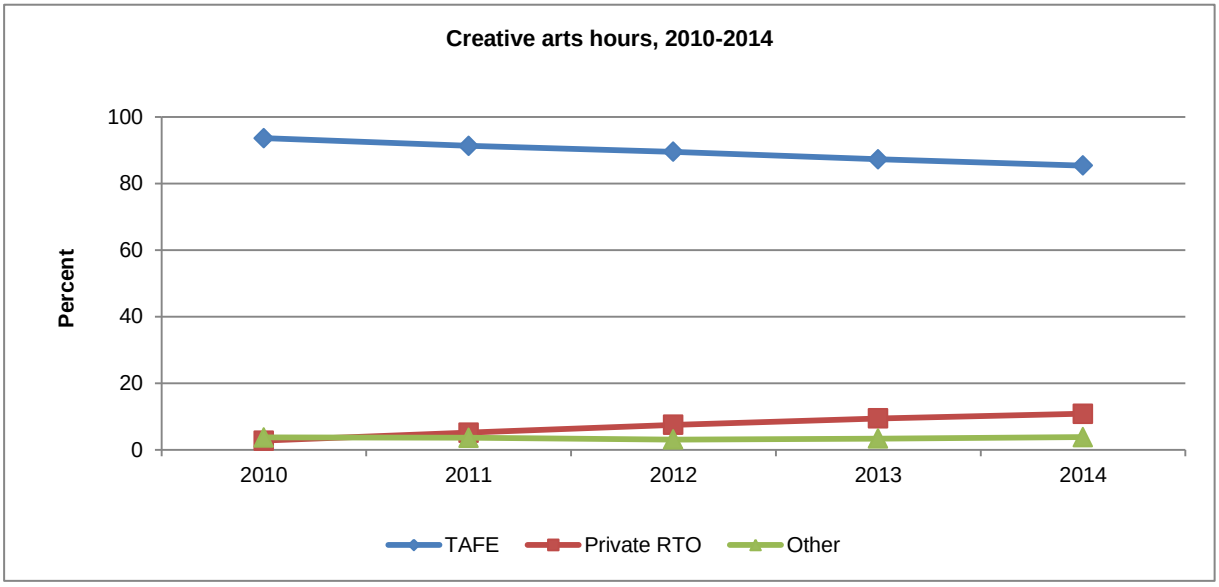
Figure 49 Shares of subject enrolment reporting hours for society and culture in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Creative arts: TAFE has retained the overwhelming majority of the share of reporting hours for these subject enrolments even though they have crept slowly downwards each year across the period. Those for private RTOs have moved slowly in the opposite direction. In 2014 TAFE had 85% of market share, while private RTOs had 10%. The combined total share for non-TAFE providers in 2014 was 15%. Over the period TAFE had lost around eight percentage points.

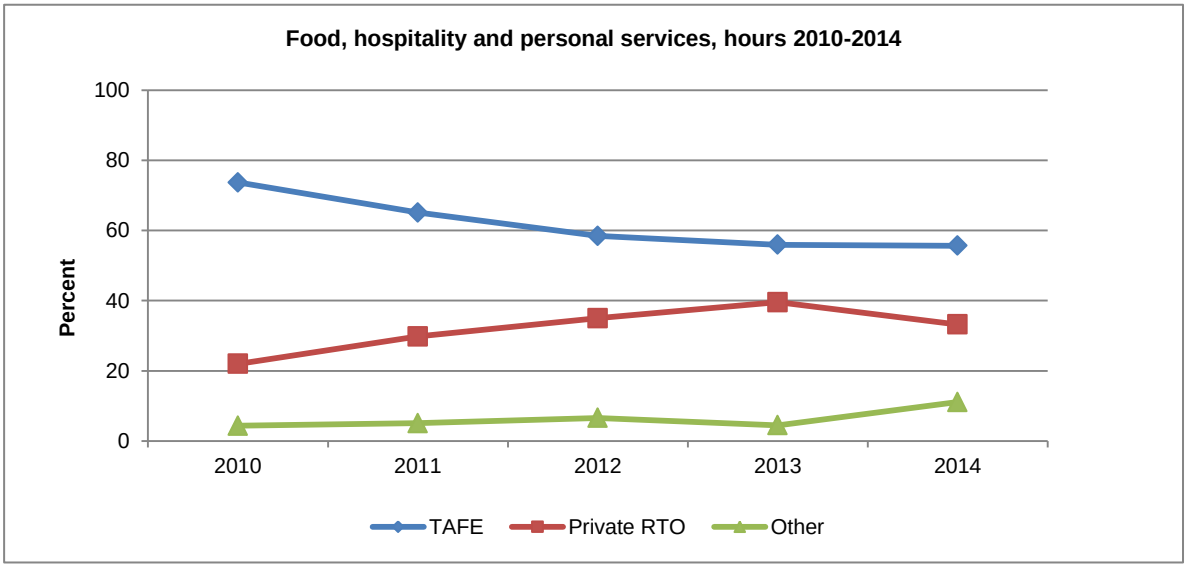
Figure 50 Shares of subject enrolment reporting hours for creative arts in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Food, hospitality and personal services: in 2010 TAFE had about 75% of market share but has trended downwards each year since then. By 2014 its share had dropped to around 55%. By comparison, the share of private RTOs has trended upwards. For 'other' RTOs and providers, the trends have remained more stable, until 2013, when its share doubled. The combined share for non-TAFE RTOs was around 44%, representing the largest market share for non-TAFEs.

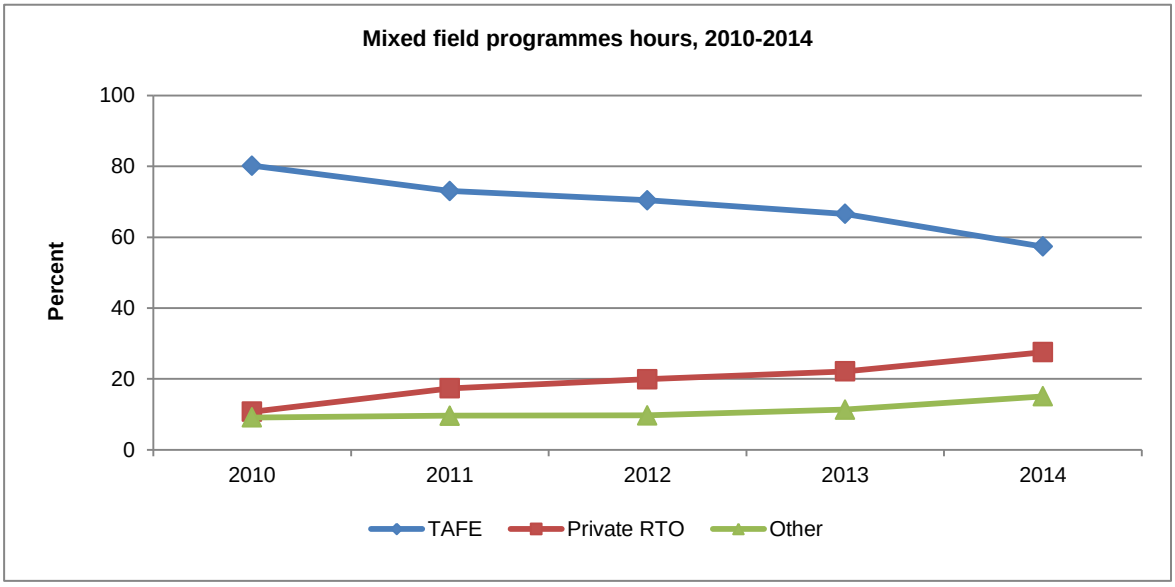
Figure 51 Shares of subject enrolment reporting hours for food, hospitality and personal services in government-funded VET by provider type, 2010–14 (%)



Source: National VET Provider Collection, 2014.

Mixed field programmes: TAFE's share of subject enrolments reporting hours for mixed field programs has steadily decreased each year throughout the period. Where TAFE started out with around 80% of the share in 2010, by 2014 this had dropped to about 57%, a loss of almost 23 percentage points. By contrast, private providers had experienced a slow but consistent increase. The shares for 'other' RTOs and providers have generally remained stable, only lifting in 2014. By 2014 non-TAFE providers had around 43% of market share.

Figure 52 Shares of subject enrolment reporting hours for mixed field programmes in government-funded VET by provider type, 2010–14 (%)



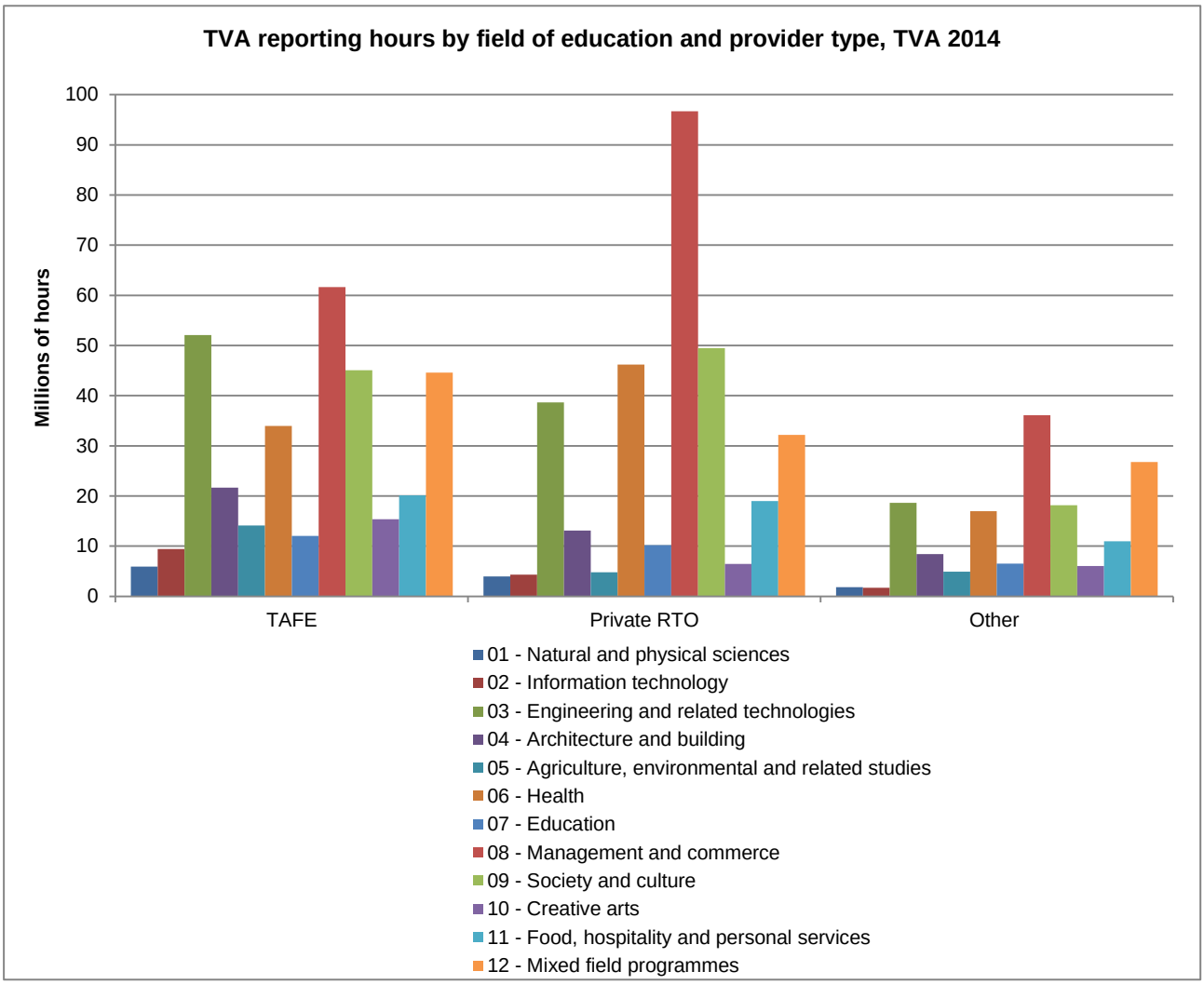
Source: National VET Provider Collection, 2014.

TVA subject enrolment reporting hours

In 2014 with a break in the series of collection, the number of total subject enrolment reporting hours was substantially greater than it was for the 2014 publicly-assisted training reported above. The 2014 TVA data suggest that the non-RTO provision is much greater. There were 523 million reporting hours in subject enrolments in the publically funded collection. When all activity is reported for 2014 (under TVA), we find this has added another 300 million hours. Management and commerce still has the greatest numbers of reporting hours; this is followed by society and culture, engineering and related technologies and mixed field programmes.

There were almost equal shares of all reporting hours across FOE subjects for TAFEs and private RTOs (around 40% each), with 'other' RTOs and providers accounting for a fifth of the share. TAFEs had slightly more (around 1%) of the share than private RTOs however.

Figure 53 Number of subject enrolment reporting hours for field of education by provider type, TVA 2014



Source: National VET Provider Collection and National VET in Schools Collection, 2014.

The shares for management and commerce, society and culture, and health were considerably greater for private RTOs than they were for TAFE, while TAFE's share for agriculture, environmental and related studies were three times the figure for private RTOs. By comparison with private RTOs and 'other' RTOs and providers, TAFE continued to have the greatest share of reporting hours in engineering and related technologies. However, when the shares of non-TAFE RTOs and providers are combined, these are greater than those for TAFE. The shares for non-TAFE RTOs and providers are considerably greater than those for TAFE in health; here they represent 65% of the total shares. The same pattern is observed for mixed field programmes, society and culture, and food, hospitality and personal services, where the share for non-TAFE RTOs and providers, when combined, outperforms those for TAFE and stands at 57%, 60%, and 60% respectively. TAFE continues to have the greatest share in information technology, agriculture, environmental and related technologies, and creative arts. In education it has lost its dominance to non-TAFE providers.

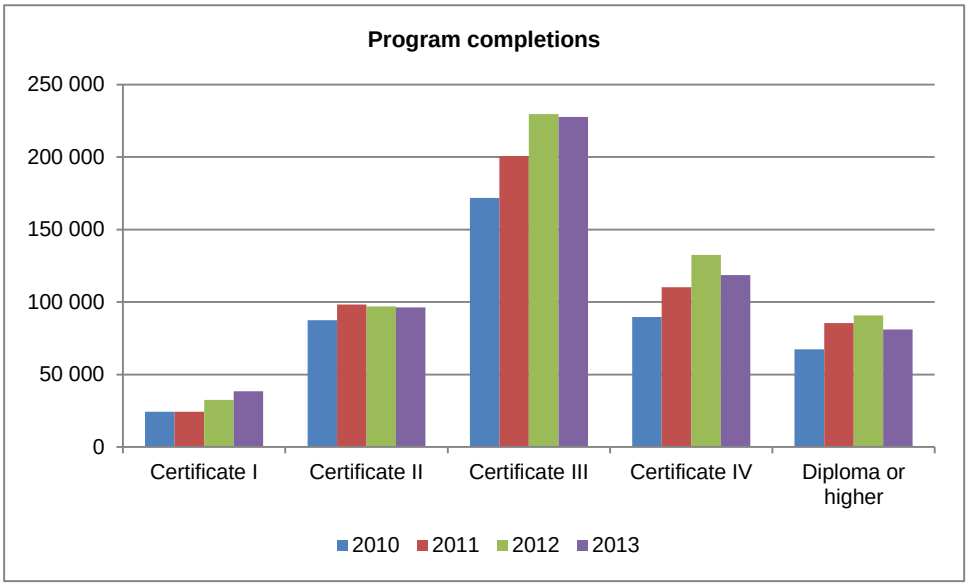
Completions

Government-funded training

Between 2010 and 2013 TAFEs, private RTOs and 'other' RTOs produced a combined total of 2.1 million program completions. The great majority of these qualifications were at the certificate III level, where they represented over 40% of total completions. The next highest number of program completions was at the certificate IV level; they accounted for just over 20% of the total. They were followed by certificate II and diploma and above level qualifications, which accounted for 18% and 15.4% respectively. The lowest number of completions was for certificate I qualifications, which accounted for just over 5% of the total.

Completions are generally trending upwards for all qualifications for every year, apart from 2013, where all but certificate I completions experienced a drop.

Figure 54 Number of total program completions in government-funded VET by qualification level, and provider type, 2010–13

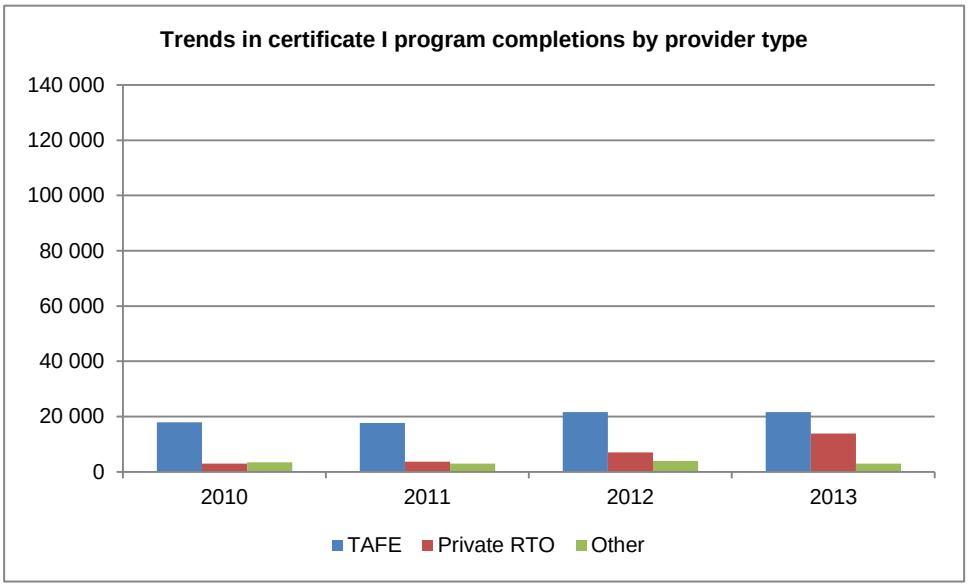


Source: National VET Provider Collection, 2014.

We report the numbers and proportional split in completions produced by TAFE, private RTOs and 'other' RTOs and providers. To understand the proportional split by provider type, we take the number of completions for each qualification and divide these by the total number of completions for that qualification produced by each of the provider types.

Certificate I completions: the number of total completions of certificate I qualifications fluctuated between 2010 and 2013. After a slight rise in 2011, they began to fall in 2012 and continued downward, albeit at a very slow rate, in 2013. The highest number of certificate I completions for each year between 2010 and 2013 are produced by TAFE. For TAFE, numbers dropped in 2011 and then increased every year after that. The number of completions of certificate I qualifications for private RTOs also jumped dramatically in 2011 and then fell gradually in the next two years. The pattern was the same for 'other' RTOs and providers.

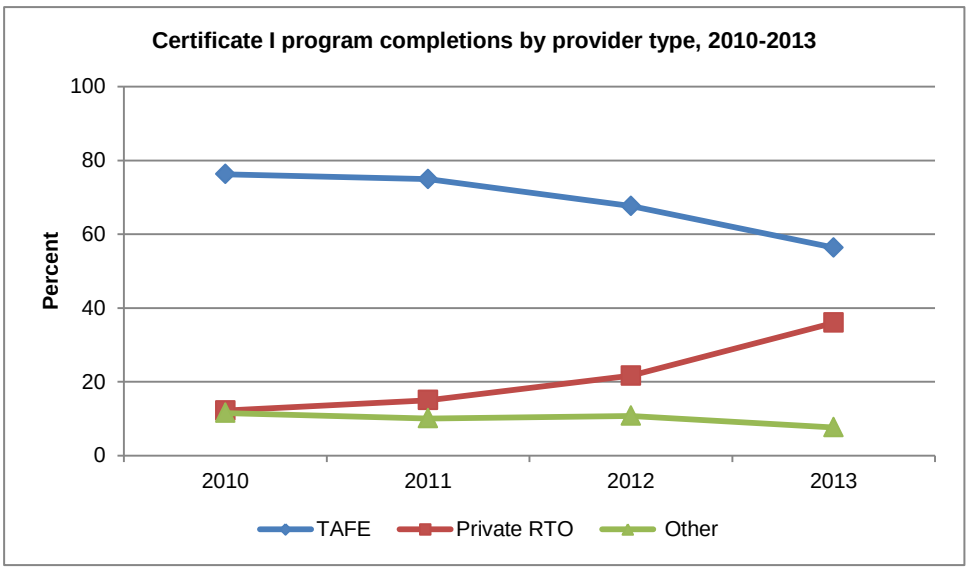
Figure 55 Trends in number of completions of certificate I level qualifications in government-funded VET by provider type, 2010–13



Source: National VET Provider Collection, 2014.

The highest number and proportion of certificate I completions for each year between 2010 and 2013 were produced by TAFE. Although the number of TAFE completions for each year increased, the TAFE share of total completions for each year since 2010 has been decreasing. In 2010 it produced approximately 18 500 completions, representing just over 75% of the share of completions for that year; between 2010 and 2013 TAFE had lost its share of completions by 21 percentage points, with most of the share going to private RTOs. Accordingly, the share of completions for private RTOs for 2010, 2011 and 2012 increased, albeit at a relatively low rate. However, in 2013 completion numbers produced by private RTOs almost doubled that of the previous year. In 2010 private RTOs had produced approximately 3000 completions; in 2013 they had produced approximately 14 000 completions, representing a significant jump on 2010 figures. The completions for 'other' RTOs and providers, at 2800, in 2010 were slightly lower than those for private providers; however, they fell slowly until 2013, when they lifted substantially. In 2014 private non-TAFE RTOs had 44% of the completions.

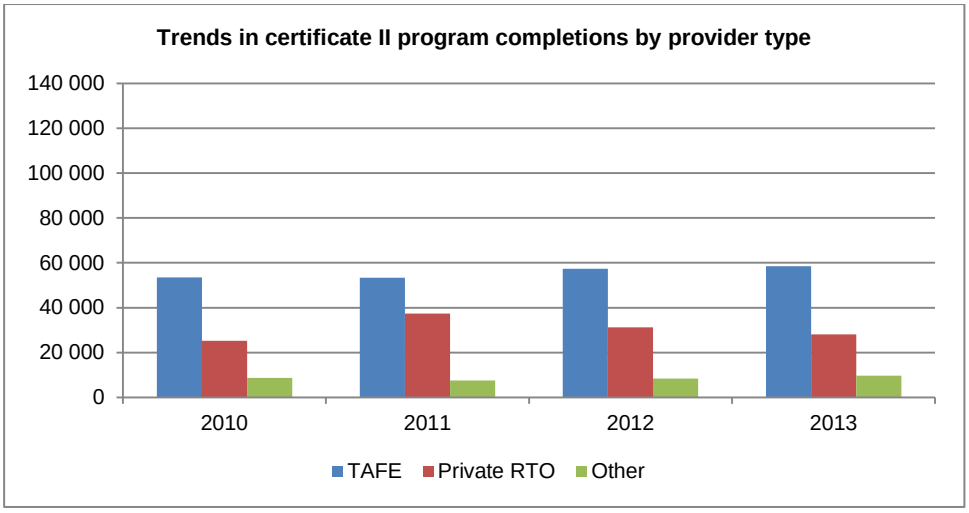
Figure 56 Percentage shares of completions of certificate I level qualifications in government-funded VET by provider type, 2010–13



Source: National VET Provider Collection, 2014.

Certificate II completions: the number of total certificate II completions has trended upwards between 2010 and 2013. This general pattern has also been experienced by TAFE. For private RTOs numbers have gradually been declining since 2011, while numbers for 'other' RTOs and providers have remained relatively stable.

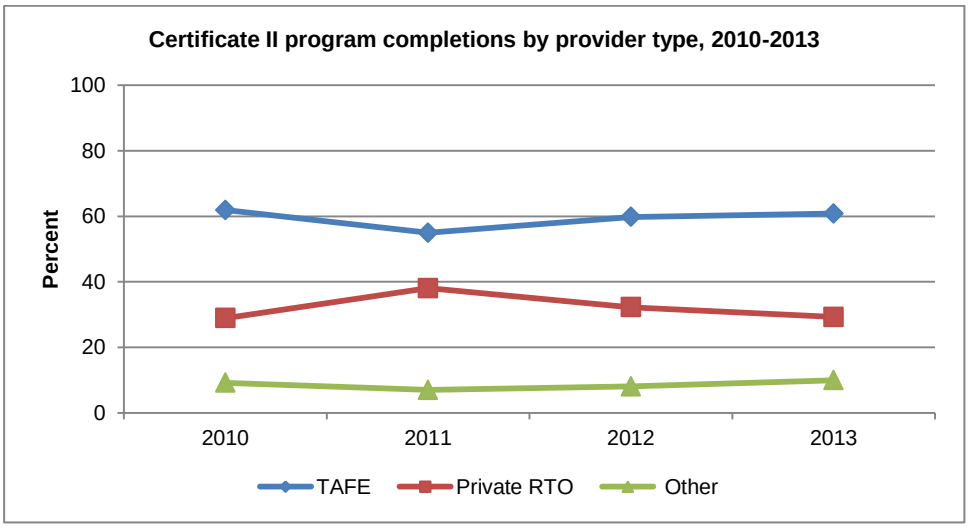
Figure 57 Trends in numbers of completions in government-funded VET of certificate II level qualifications by provider type, 2010–13



Source: National VET Provider Collection, 2014.

Although the greatest share of yearly certificate II completions is held by TAFE, the relative TAFE share has fluctuated. In 2010 TAFE produced 53 524 completions, representing just around 60% of the share of completions for that year; the following year the share dropped by seven percentage points, rising again to 2010 levels in 2012 and 2013. By comparison, private RTOs produced 25 289 completions in 2010, representing just under 30% of the share for that year; the following year its share increased by around 10 percentage points; the share fell in 2012 and dropped again in 2013. In 2013 the share mirrored the share held in 2010. In 2010 'other' RTOs and providers produced a total of approximately 8600 completions, representing around 10% of the total completions for that year; the share fell slightly in 2011, recovered in 2012 and rose again in 2013. In 2013 around 10% of completions for that year were produced by 'other' RTOs and providers.

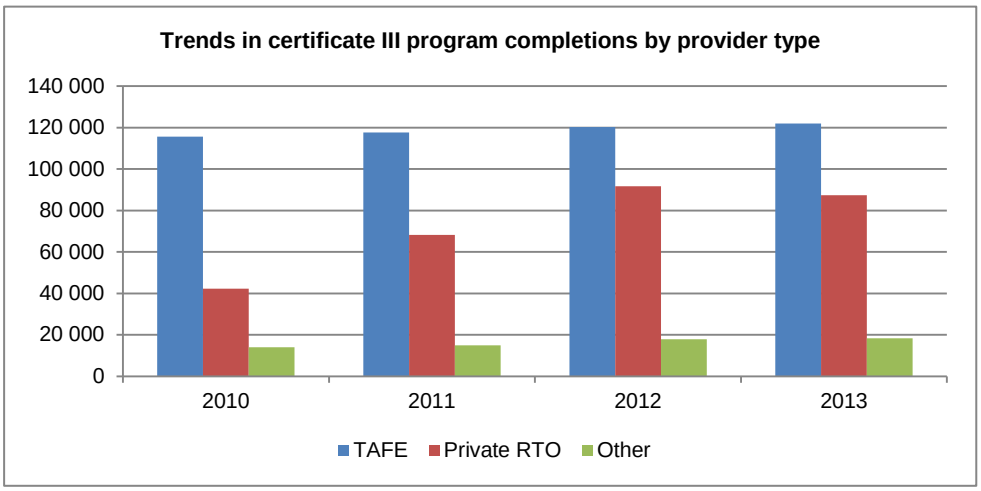
Figure 58 Percentage shares of completions of certificate II level qualifications in government-funded VET by provider type, 2010–13



Source: National VET Provider Collection, 2014.

Certificate III completions: between 2010 and 2013 total completions in certificate III level have generally moved upwards, with TAFE producing the highest number of completions for every year. Private RTOs experienced a drop in number of certificate III completions in 2013.

Figure 59 Trends in program certificate III completions in government-funded VET by provider type, 2010–13



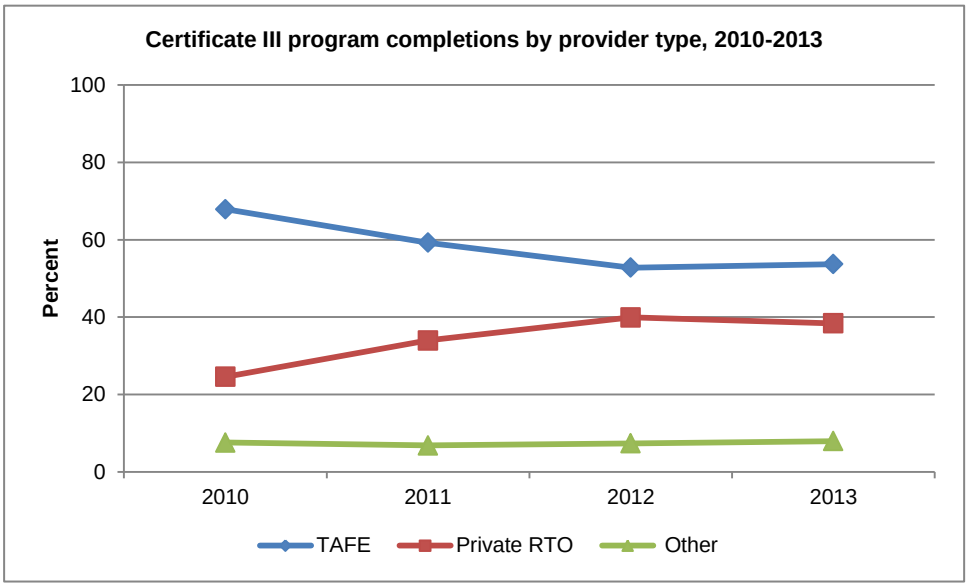
Source: National VET Provider Collection, 2014.

Between 2010 and 2012 the shares of certificate III completions trended downwards for TAFE and upwards for private RTOs. They remained relatively stable for 'other' RTOs and providers. The pattern changed slightly in 2013, when TAFE completions had a slight increase, and completions for private RTOs and 'other' RTOs and providers moved in the opposite direction. In 2010 TAFE produced 116 698 qualifications. This represented just over a two-thirds share of the certificate III completions for that year. The following year the share for TAFE dropped almost 10 percentage points, continuing its downward trajectory in 2012; the trend moved upwards in 2013, albeit very slightly. By 2013 the share for TAFE had dropped as much as 14 percentage points over 2010 figures. Most of the share was lost to private RTOs.

In 2010 private RTOs produced 42 225 certificate III completions, representing just over a quarter of the share for that year. Between 2010 and 2011 the share for private RTOs rose by about 10 percentage points; it continued its upward trend, adding another six percentage points in 2012. Although the share for private RTOs stayed relatively stable between 2012 and 2013, it began to trend slowly downwards with a loss of 4255 completions.

The 'other' RTO sector had 13 001 completions in 2010, representing around 8% of the share of completions in 2010. This share stayed relatively stable throughout the period.

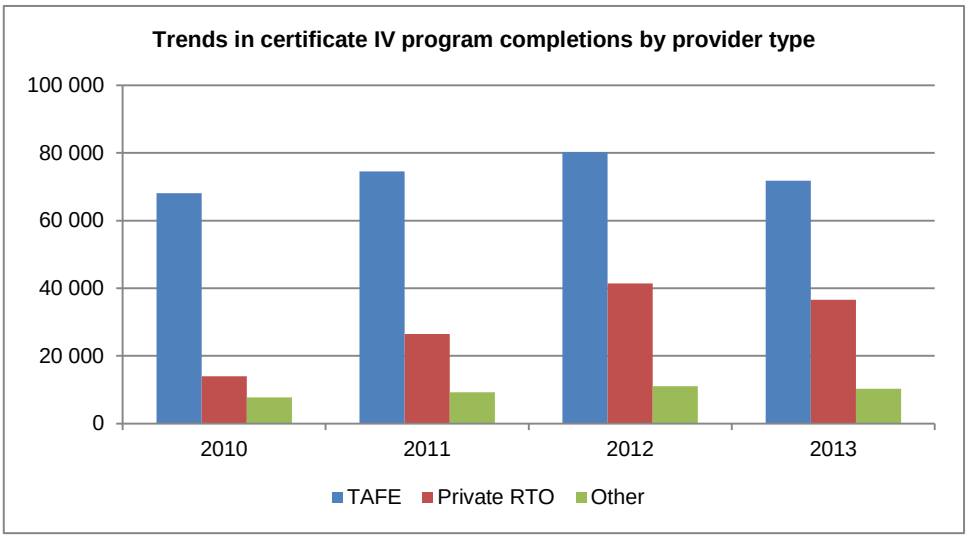
Figure 60 Percentage shares of certificate III program completions in government-funded VET by provider type, 2010–13



Source: National VET Provider Collection, 2014.

Certificate IV completions: the total number of certificate IV completions generally trended upwards until 2013, when they experienced a decrease. Between 2010 and 2013 TAFE had higher numbers of certificate IV completions than all other providers. The number of completions for TAFE trended upwards until 2012, when they began to fall. The numbers for private RTOs have been trending upwards at a faster rate than TAFE. However, they also experienced a drop in 2013. The numbers for 'other' RTOs and providers have also trended upwards and have remained relatively stable, with a slight fall in 2013.

Figure 61 Trends in certificate IV program completions in government-funded VET by provider type, 2010–13

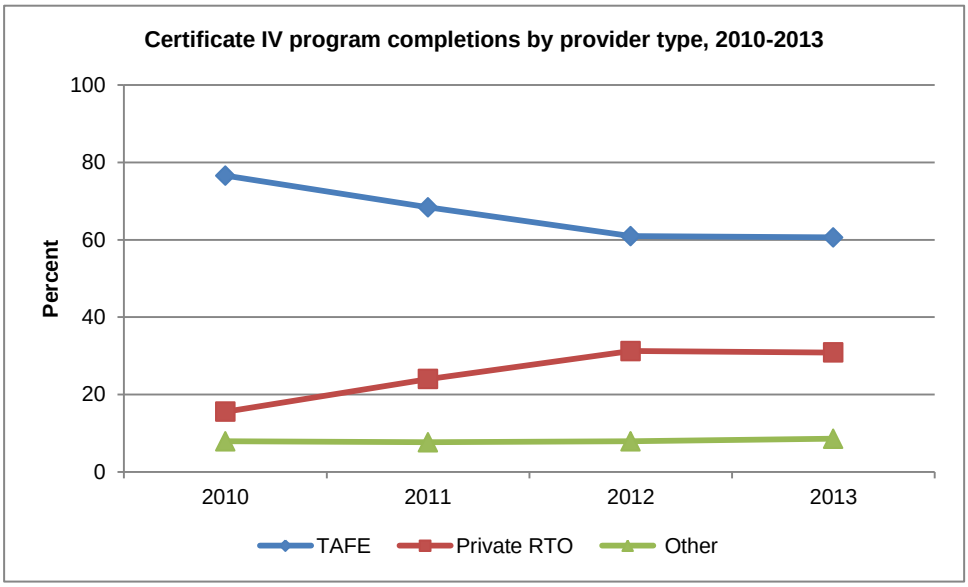


Source: National VET Provider Collection, 2014.

The shares for completions for the different provider types tell a more nuanced story. Between 2010 and 2013 the shares of certificate IV completions have been trending downwards for TAFE and generally upwards for private RTOs. Completions for 'other' RTOs and providers across the period remained relatively static. In 2010 TAFE had 68 704 completions, representing just over 75% of the share of the completions for that year; the share dropped in 2011 and 2012. By 2013 it had dropped to just over 60%. This represented a drop of just over 15 percentage points from 2010 figures. In the same year private RTOs reported 13 947 completions, representing just over 15% of the share. Since that time the private

RTO share has increased substantially, and in 2013 the share for private RTOs represents double the 2010 figure. In 2010 'other' RTOs and providers reported 7068 completions, representing just over 8% of the total share. This share remained stable throughout the period.

Figure 62 Percentage shares of certificate IV program completions in government-funded VET by provider type, 2010–13

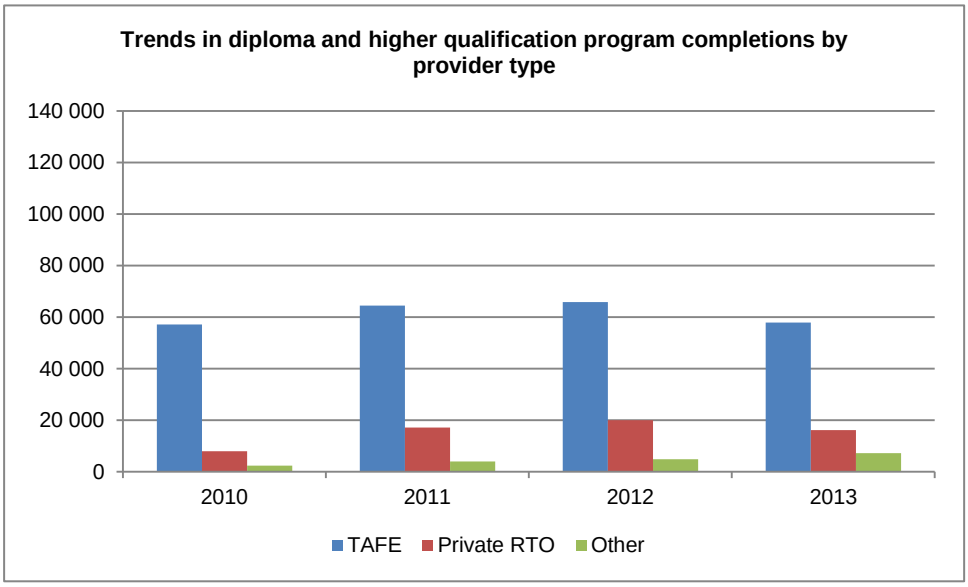


Source: National VET Provider Collection, 2014.

Diploma and higher qualification completions: between 2010 and 2013 there were overwhelmingly more completions of diploma and higher qualifications for every year for TAFE than for private RTOs and 'other' RTOs. This is not surprising as TAFE had more of the share of enrolments in these qualifications than the other two sectors.

In 2010 TAFE produced just over 57 000 program completions, representing 85% of the total share of completions for that year. In 2011 the TAFE share of completions dropped substantially, while that for private RTOs increased. The share lost by TAFE was picked up by private RTOs that year.

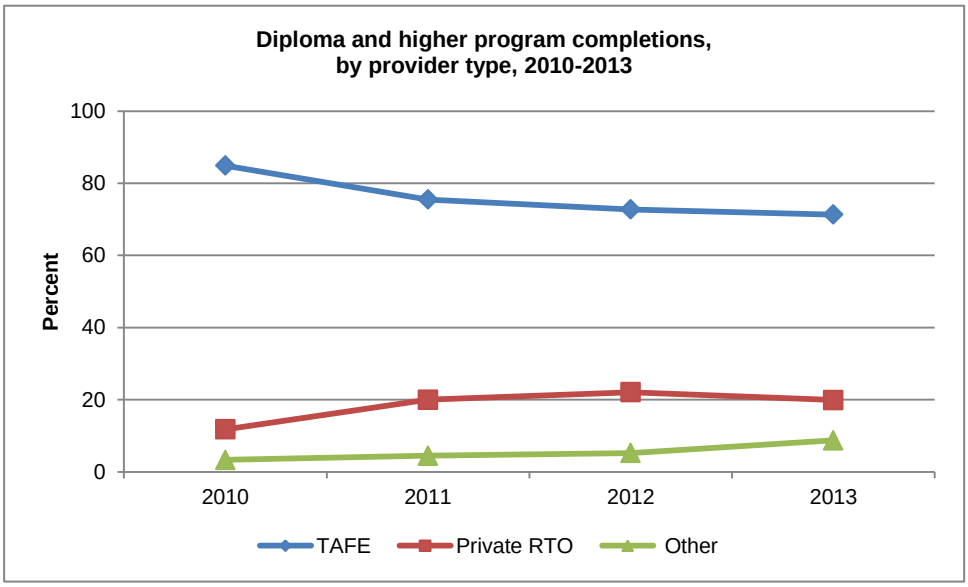
Figure 63 Trends in program completions for diploma and higher-level qualifications in government-funded VET by provider type, 2010–13



Source: National VET Provider Collection, 2014.

Since 2010 the TAFE share of completions has been gradually trending downwards, although never below the 70% mark. The share for private RTOs increased approximately 10 percentage points. The share of completions for 'other' RTOs and providers remained relatively stable, although slowly trending upwards. Between 2010 and 2012 it remained around the 5% mark; by 2013 it more than doubled the 2010 figure.

Figure 64 Percentage shares of diploma and higher-level qualification program completions in government-funded VET by provider type, 2010–13

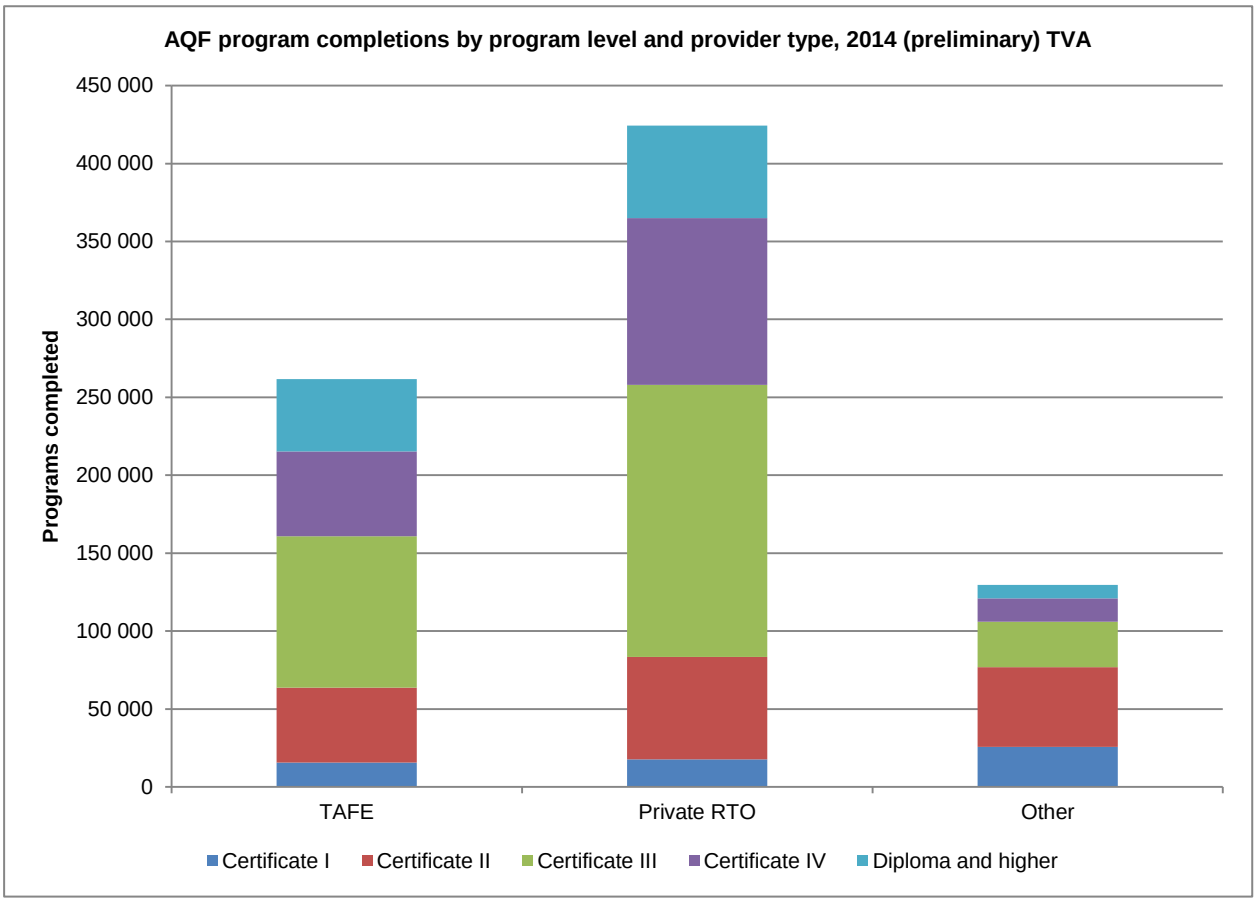


Source: National VET Provider Collection, 2014.

TVA completions

The completions in the 2014 TVA collection tell a different story. Private RTOs produced the highest number of program completions, especially for certificate III qualifications and IV qualifications. TVA completions show that the private RTOs produced 32% of the share of all AQF qualifications compared with 23% for TAFEs and 16% for 'other' RTOs and providers. TAFE produced 27% of certificate I completions, 29% of certificate II completions, 32% of certificate III completions, 31% of certificate IV qualifications and 41% of diploma and above completions. The remainder of the share was produced by the non-TAFE RTOs, mainly by private RTOs. Private RTOs produced just over 60% of certificate IV completions, 58% of completions for certificate III, and just 52% of completions for diploma and above qualifications. They produced 40% of certificate II qualifications. 'Other' RTOs and providers had most (43%) of the share of certificate I qualifications and outperformed completions for TAFE by 10 004.

Figure 65 Numbers of program completions by program level and provider type, 2014 (preliminary) TVA 2014

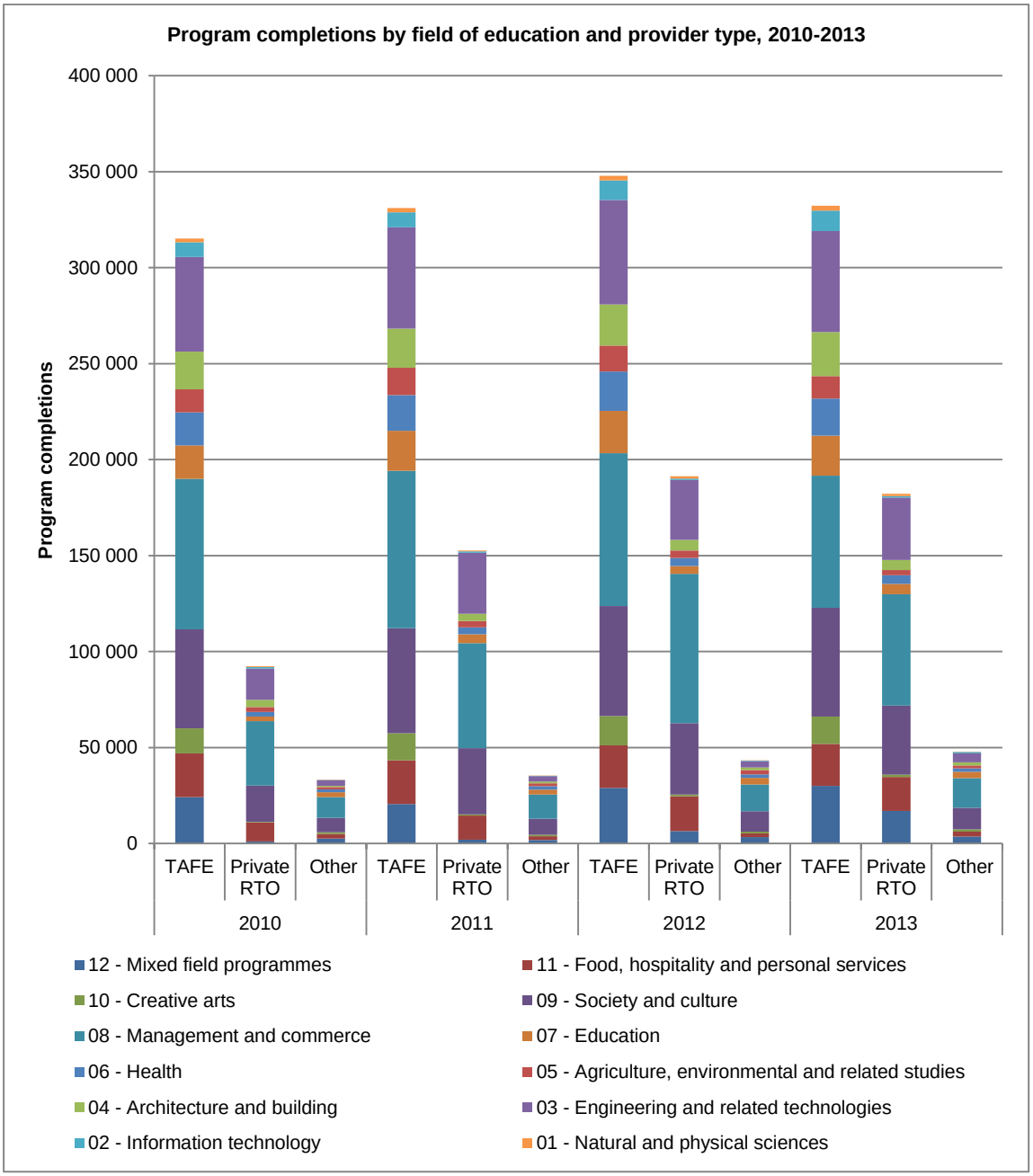


Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Completions for field of education

By comparison with private RTOs and 'other' RTOs and providers, TAFE produced the majority of shares of total yearly completions for each of the years between 2010 and 2013. This was observed across most fields of education. The greatest of the TAFE yearly completions shares were for management and commerce, followed by society and culture, engineering and related technologies, and education and mixed field programmes. However, for most of the FOEs these shares have been slowly dropping away. The pattern for private RTOs tells a different story. Where the TAFE shares of total yearly completions for most FOEs have generally been trending downwards, those for private RTOs have generally been trending upwards.

Figure 66 Number of completions by FOE in government-funded VET and by provider type, 2010–13



Source: National VET Provider Collection, 2014.

We can also take the percentage of total completions produced by each FOE in a year and analyse this by provider type. We find the highest share of total FOE completions was for the management and commerce delivered by TAFE; however, this was closely followed by the same management and commerce delivered by private RTOs. The society and culture FOE delivered by TAFE and the engineering and related technologies FOE also delivered by TAFE were in third and fourth place, respectively. In fifth place was the society and culture FOE, closely followed by the engineering and related technologies FOE produced by private RTOs.

Table 6 Shares of total FOE completions produced in 2013, in government-funded VET by FOE and provider type (%)

	TAFE	Private RTO	Other	Total
01 - Natural and physical sciences	0.5	0.2	0.0	0.7
02 - Information technology	2.1	0.2	0.1	2.4
03 - Engineering and related technologies	10.2	6.5	0.9	17.6
04 - Architecture and building	4.1	1.0	0.3	5.4
05 - Agriculture, environmental and related studies	2.2	0.5	0.3	3.0
06 - Health	3.8	0.9	0.3	5.0
07 - Education	4.1	1.1	0.6	5.8
08 - Management and commerce	13.7	11.7	3.1	28.4
09 - Society and culture	10.4	7.2	2.3	19.9
10 - Creative arts	2.6	0.2	0.2	3.0
11 - Food, hospitality and personal services	4.4	3.6	0.5	8.5
12 - Mixed field programmes	0.1	0.1	0.0	0.2
Total	**58.1**	**33.1**	**8.8**	**100.0**

Source: National VET Provider Collection, 2014.

To get a more detailed view of the relative shares for all RTO types for each of the FOEs we can look at them for 2013 completions only. This shows that TAFE's market share was highest for information technology, creative arts, architecture and building, and health, and lowest for management and commerce, and food, hospitality and personal services, and society and culture, where considerable market share was being taken up by private RTOs.

Table 7 Percentage shares of completions in government-funded VET by different FOEs and provider types, 2013

	TAFE	Private RTO	Other	Total
02 - Information technology	87.0	7.0	6.0	100
10 - Creative arts	84.8	7.4	7.8	100
06 - Health	75.4	17.6	7.0	100
04 - Architecture and building	77.1	17.5	5.4	100
05 - Agriculture, environmental and related studies	73.3	16.9	9.8	100
07 - Education	70.8	18.3	10.9	100
01 - Natural and physical sciences	68.1	30.4	1.5	100
12 - Mixed field programmes	59.1	33.6	7.3	100
03 - Engineering and related technologies	58.6	36.1	5.3	100
09 - Society and culture	54.5	34.7	10.9	100
11 - Food, hospitality and personal services	52.3	41.9	5.8	100
08 - Management and commerce	48.4	40.8	10.9	100
Total	**58.1**	**33.1**	**8.8**	**100**

Source: National VET Provider Collection, 2014.

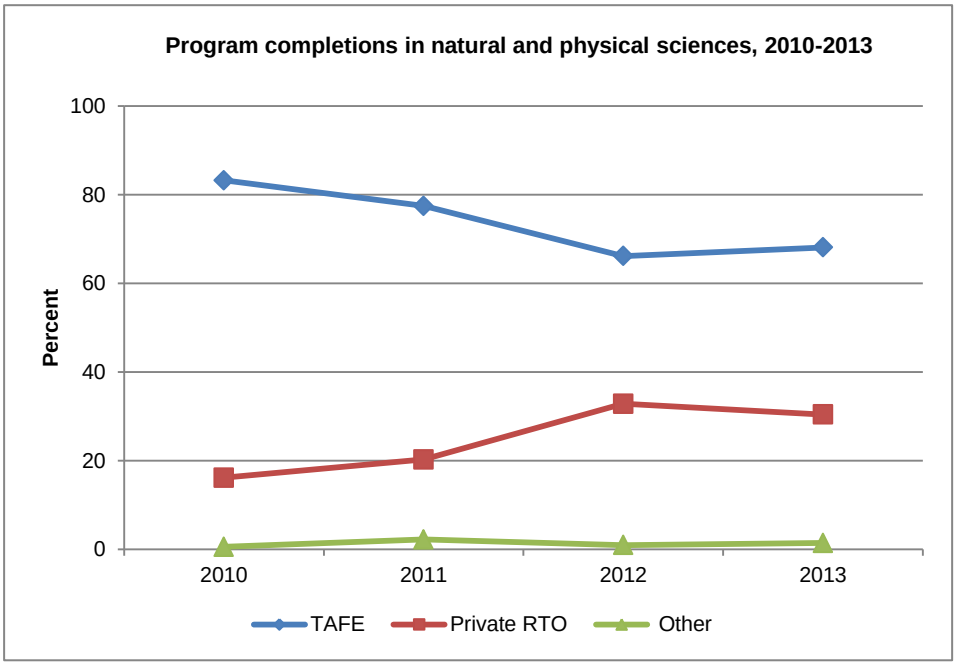
Trends in market share of completions

Between 2010 and 2013 the TAFE share of completions for FOEs is always higher than that for non-TAFE RTOs and providers. However, these generally trend downwards across the time period, while those for private RTOs and 'other' RTOs and providers often trend in the opposite direction. The TAFE share in 2013

was always below the 2010 figure, but in some FOEs (namely natural and physical sciences and agriculture, environmental and related studies), they had started to climb slowly upwards from the previous year. By contrast, completions shares for private RTOs generally trended upwards, with a small dip in 2013. With the exception of those for information technology, and agriculture, environmental and related studies, these shares were always higher in 2013 than when they started out in 2010.

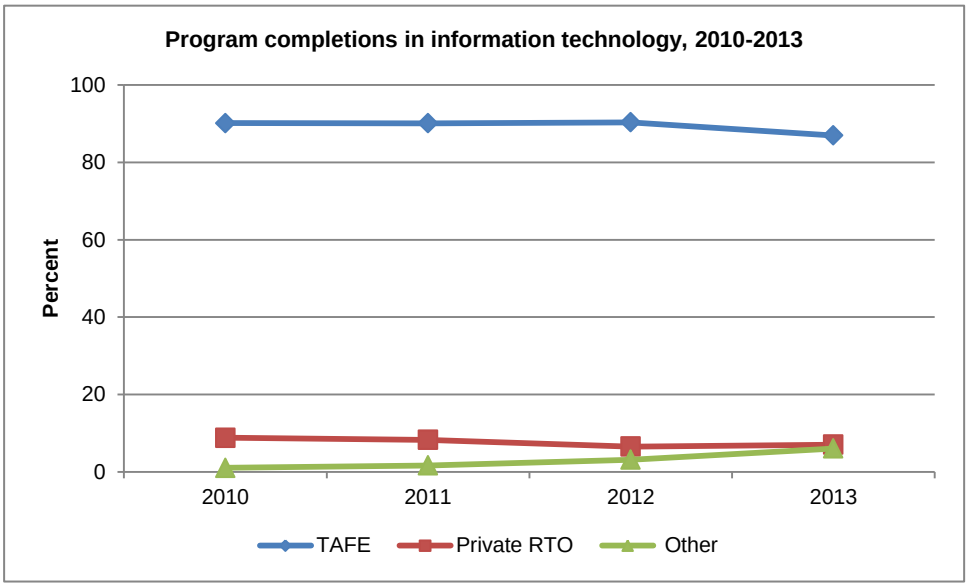
Across the four years the changes in completions shares produced by private RTOs were more dramatic in some areas than in others. For example, in management and commerce the private RTO share was 27.3% in 2010 (lower than that for TAFE by approximately 36 percentage points); it had increased to 40.8% four years later however (just eight percentage points lower than the TAFE figure). In 2012 the private RTO share had almost equalled that of TAFE (a difference of 1.0 percentage points). Food, hospitality and personal services completion shares were 28.4% in 2010 (lower than those for TAFE by just over 35 percentage points). The following year their share increased, although still considerably lower than it was for TAFE (27.0 percentage points lower). In 2012 and 2013 the completions share for private RTOs was just 10 percentage points lower than that for TAFE. The most dramatic increases for the private RTO share of completions over the period was for mixed field programmes. These have doubled year on year throughout the period. In 2010 they stood at just 3.7% by comparison with the 86.5% produced by TAFE; in 2013 they stood at 34% by comparison with the 59% produced by TAFE. The share for 'other' RTOS, although mainly trending upwards, has had a much flatter trajectory.

Figure 67 Trends in share of completions in government-funded VET by provider type and natural and physical sciences FOE, 2010–13



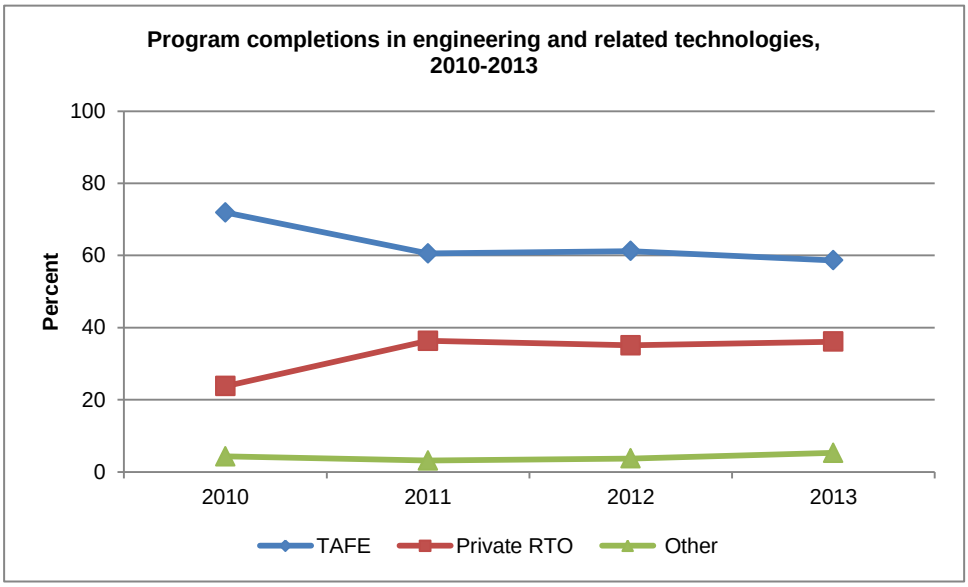
Source: National VET Provider Collection, 2014.

Figure 68 Trends in share of completions in government-funded VET by provider type and information technology FOE, 2010–13



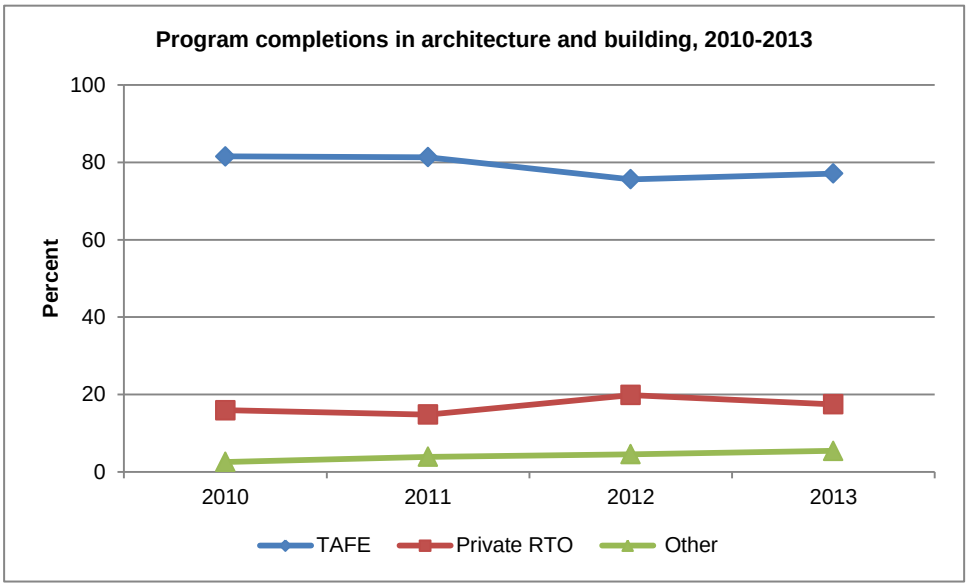
Source: National VET Provider Collection, 2014.

Figure 69 Trends in share of completions in government-funded VET by provider type and engineering and related technologies FOE, 2010–13



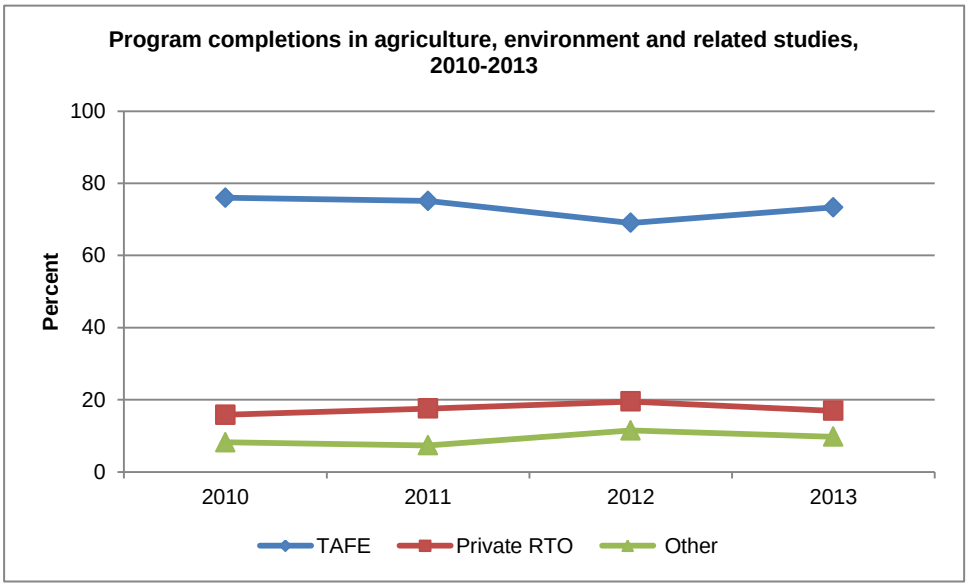
Source: National VET Provider Collection, 2014.

Figure 70 Trends in share of completions in government-funded VET by provider type and architecture and building FOE, 2010—13



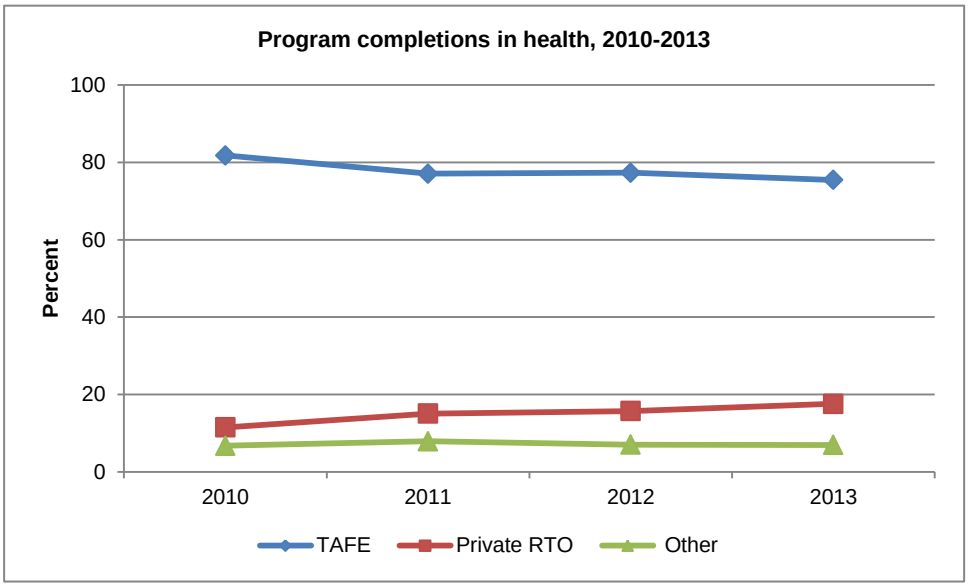
Source: National VET Provider Collection, 2014.

Figure 71 Trends in share of completions in government-funded VET by provider type and in agriculture, environment and related studies FOE, 2010–13



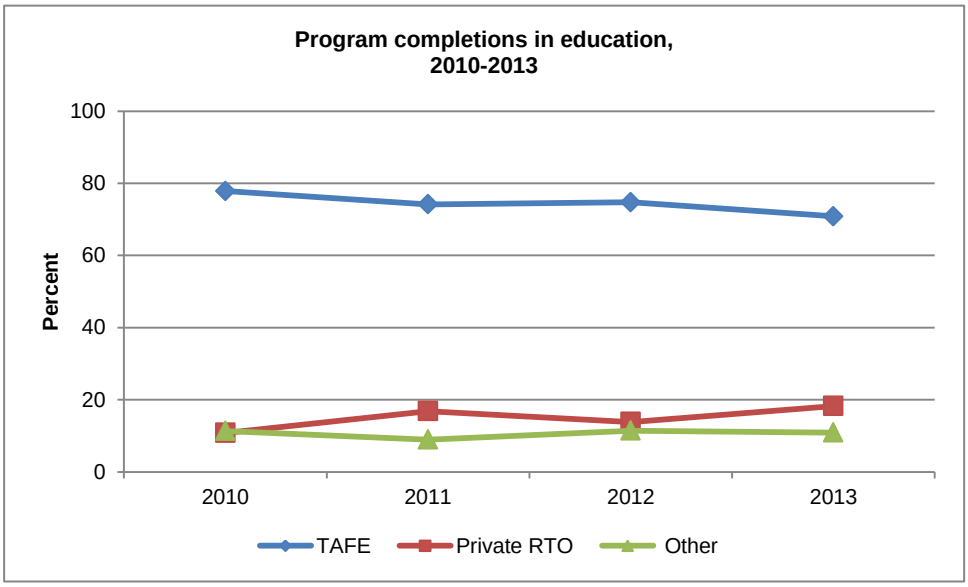
Source: National VET Provider Collection, 2014.

Figure 72 Trends in share of completions in government-funded VET by provider type and health FOE, 2010—13



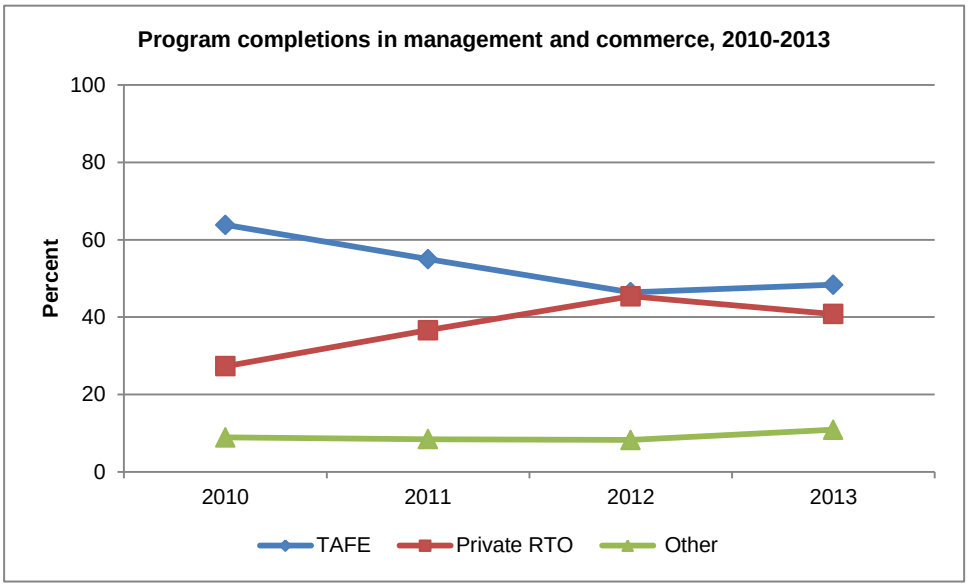
Source: National VET Provider Collection, 2014.

Figure 73 Trends in share of completions in government-funded VET by provider type and education FOE, 2010–13



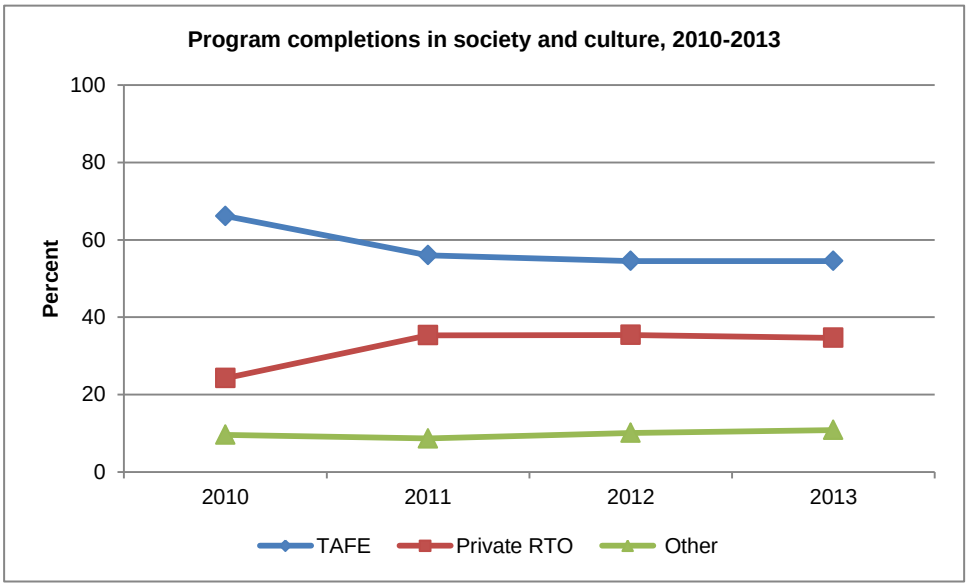
Source: National VET Provider Collection, 2014.

Figure 74 Trends in share of completions in government-funded VET by provider type and management and commerce FOE, 2010–13



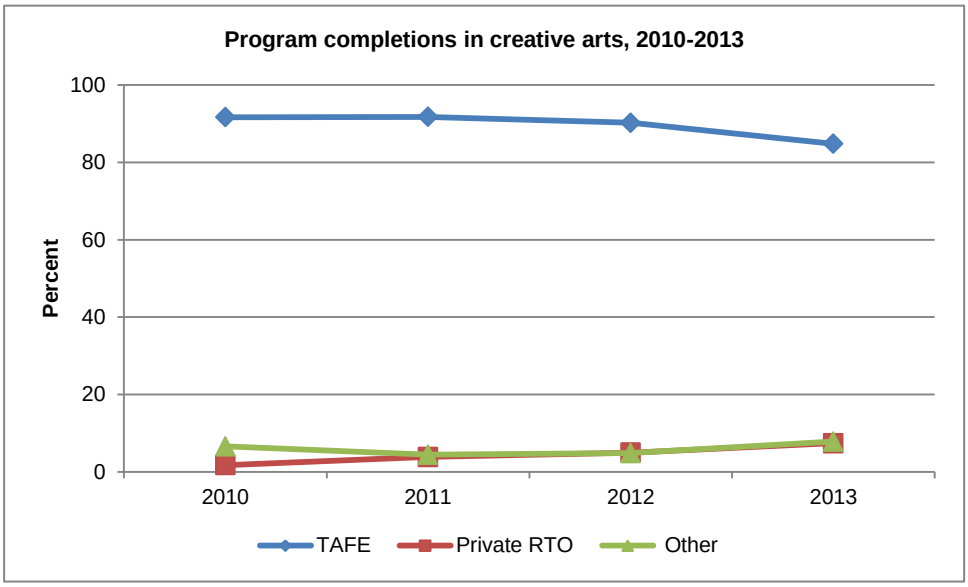
Source: National VET Provider Collection, 2014.

Figure 75 Trends in share of completions in government-funded VET by provider type and society and culture FOE, 2010–13



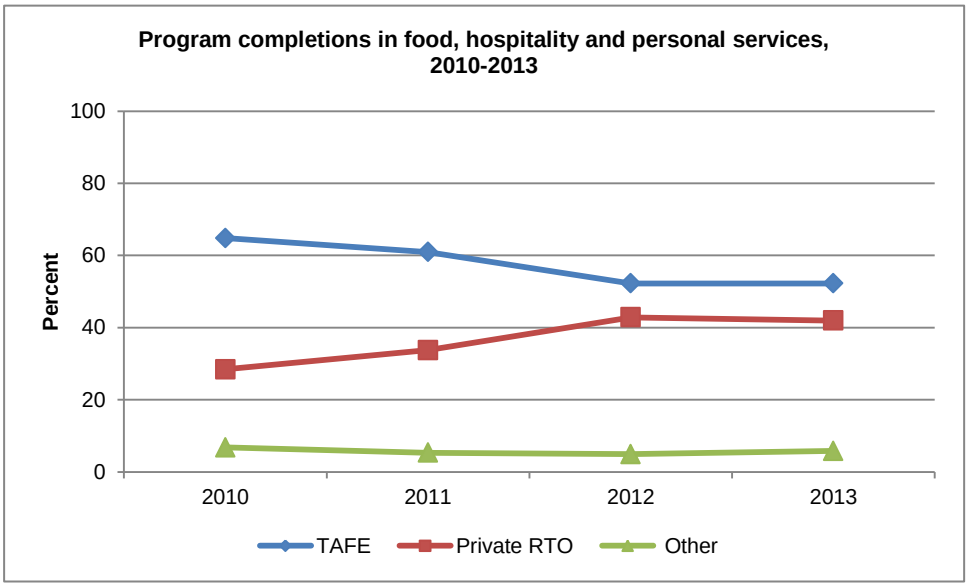
Source: National VET Provider Collection, 2014.

Figure 76 Trends in share of completions in government-funded VET by provider type and creative arts FOE, 2010–13



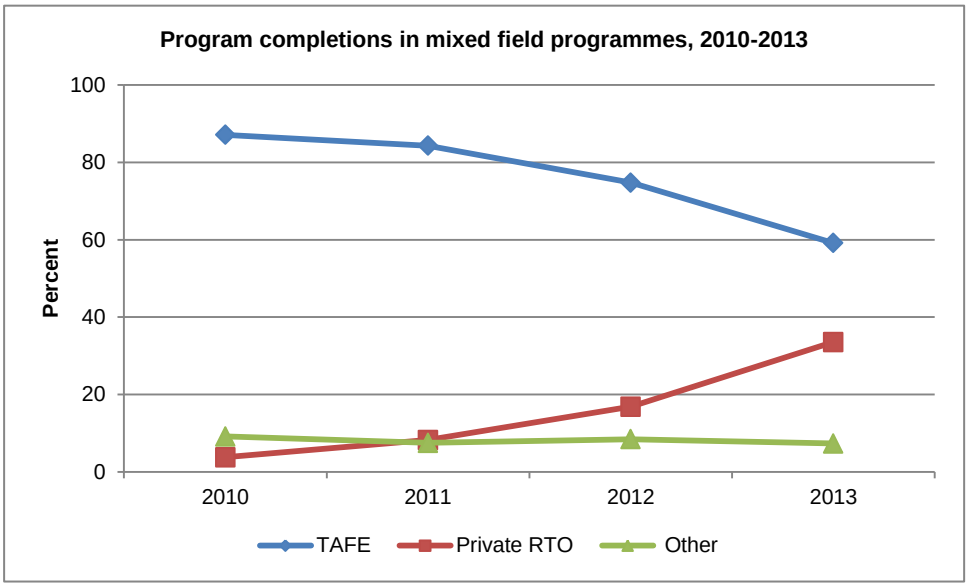
Source: National VET Provider Collection, 2014.

Figure 77 Trends in share of program completions in government-funded VET by provider type food, hospitality and personal services FOE, 2010–13



Source: National VET Provider Collection, 2014.

Figure 78 Trends in share of program completions in government-funded VET by provider type and mixed field programmes FOE, 2010–13



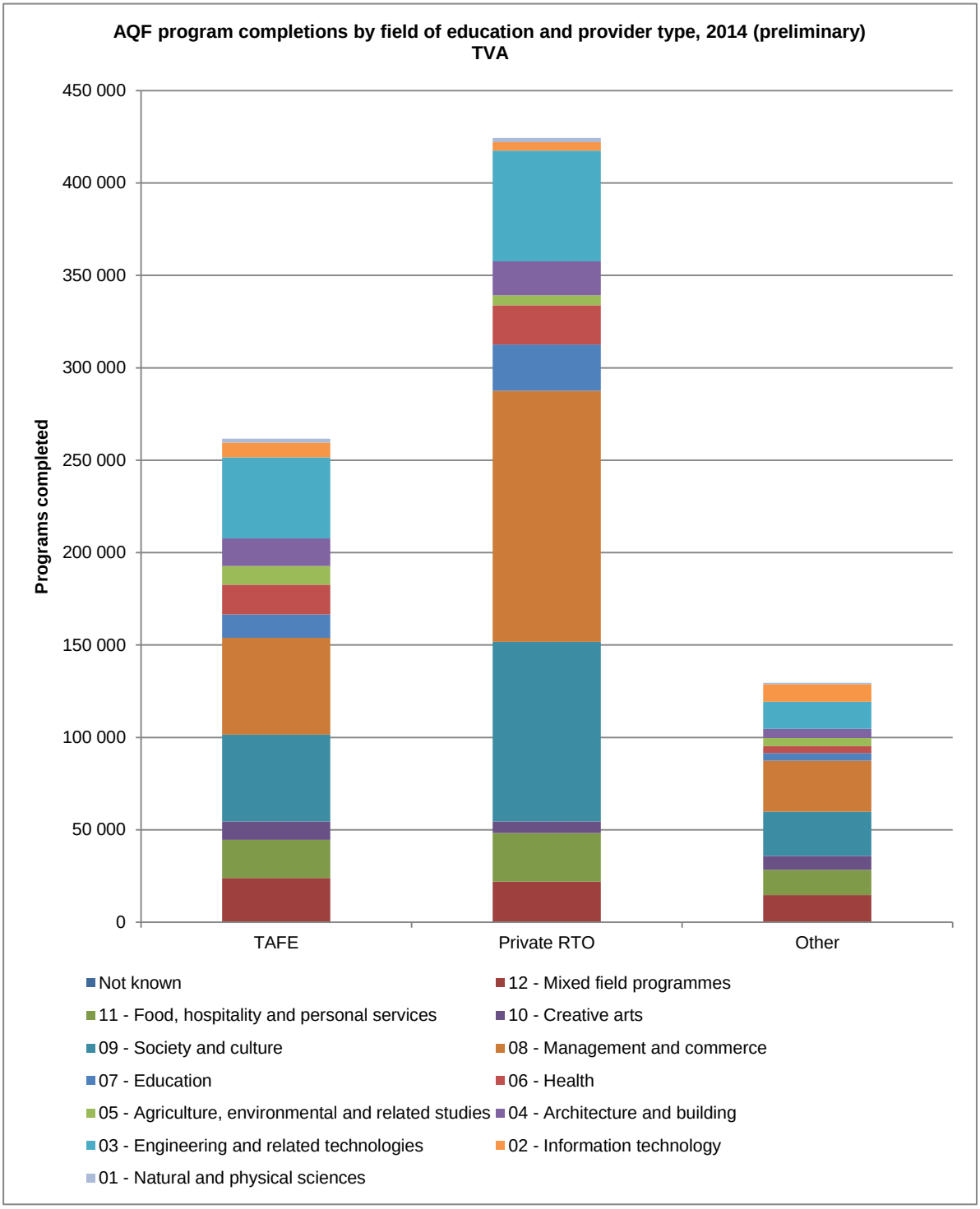
Source: National VET Provider Collection, 2014.

TVA completions 2014

Completions from the TVA collection indicate that, by comparison with TAFE and 'other' RTOs and providers, private RTOs produced the greatest number of total FOE program completions. They had more of the share of these FOE completions than TAFE in all FOEs with the exception of mixed field programmes, creative arts, agriculture, environmental and related studies, information technology and natural and physical sciences. However, for natural and physical sciences the differences were minimal.

Private RTOs produced 63% of the shares for management and commerce, 60% of the share for education, 58% of the share for society and culture, and just over half (52%) of the share for health.

Figure 79 AQF program completions by field of education and provider type, TVA 2014, preliminary data



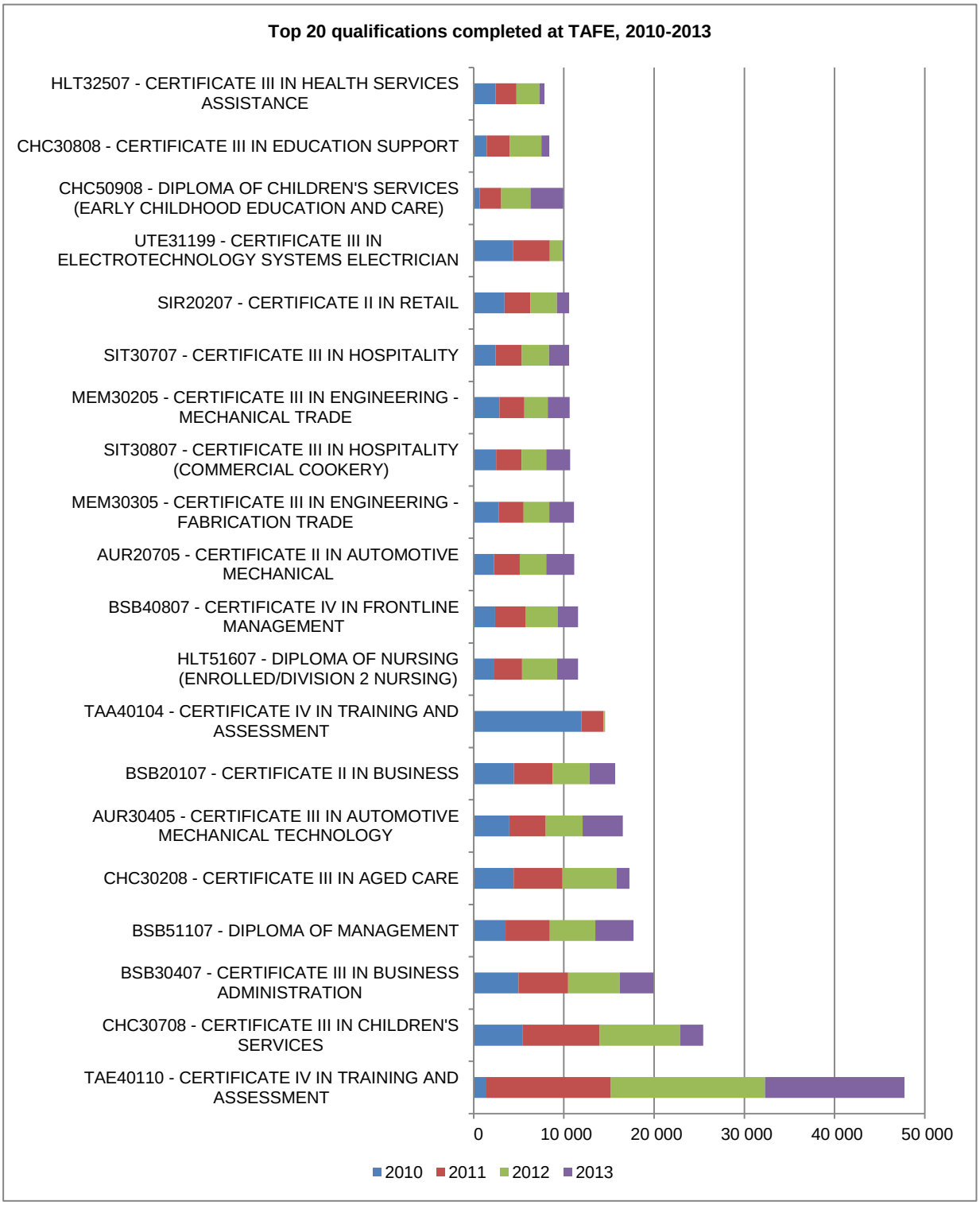
Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Most frequently completed qualifications 2010 and 2013

Government-funded training

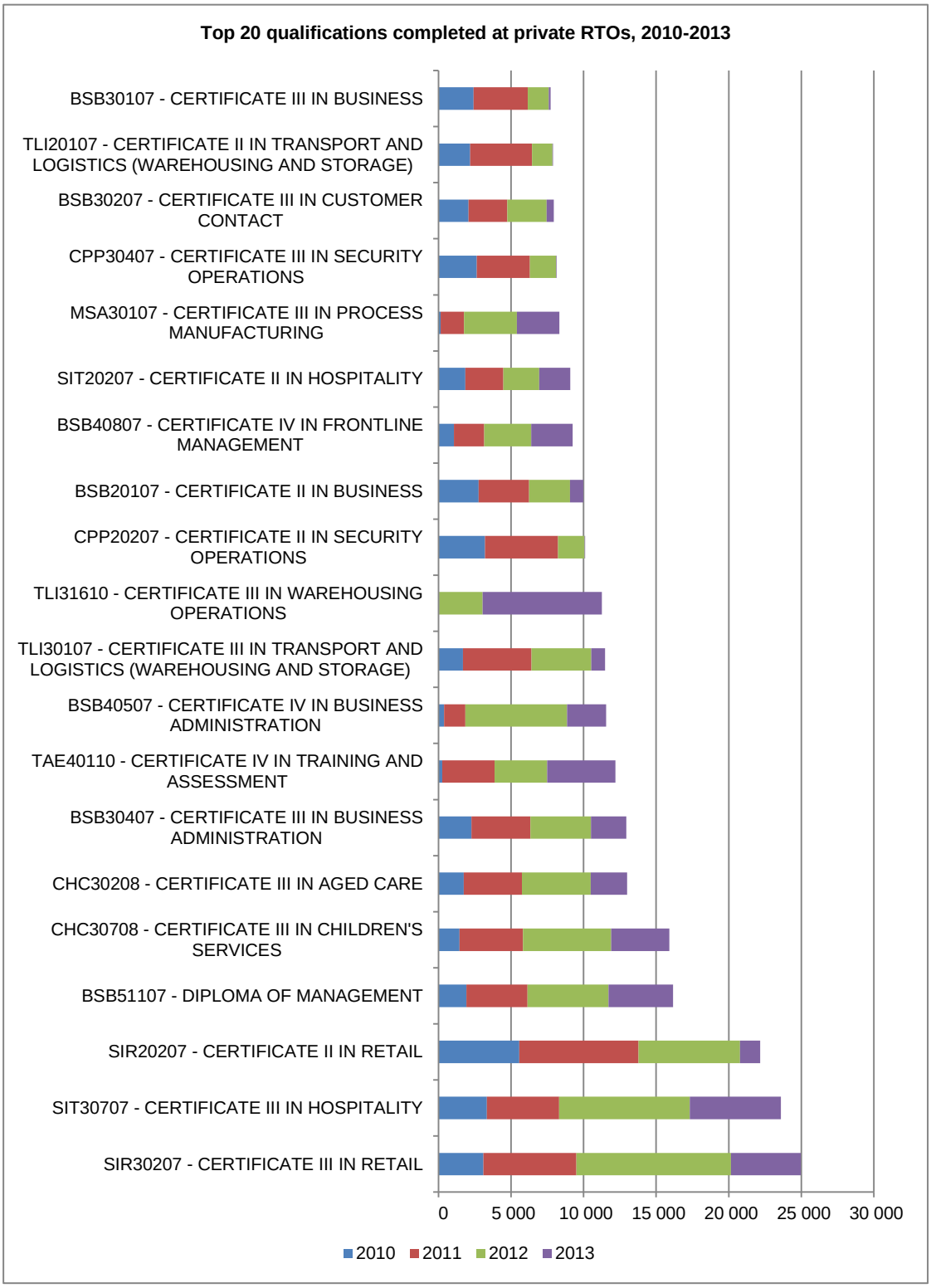
In figures 80, 81 and 82 we present the top 20 qualifications completed at TAFEs, private RTOs and 'other' RTOs and providers for the years between 2010 and 2013. For TAFEs the most numerous of the qualifications completed over the period was the Certificate IV in Training and Assessment (TAE40110). This was followed by the Certificate III in Children's Services (CHC 30708). By comparison, the Certificate III in Retail (SIR 30207), and the Certificate III in Hospitality (SIT 30707) had the highest number of qualifications completed in private RTOs. These were followed by the Certificate II in Retail ((SIR 20207), the Diploma of Business Management (BSB 51107) and the Certificate III in Children's Services (CHC 30708). For 'other' RTOs and providers, the most numerous completions were for the Certificate II in Retail (SIR 20207), followed by the Certificate IV in Training and Assessment (TAE4010), Certificate III in Children's Services (CHC 30708), Certificate III in Aged Care (CHC 30708) and Certificate III in Retail (SIR 30207) accounted for the next highest group of qualification completions.

Figure 80 Top 20 qualifications completed at TAFE in government-funded VET by name of qualification, 2010–13



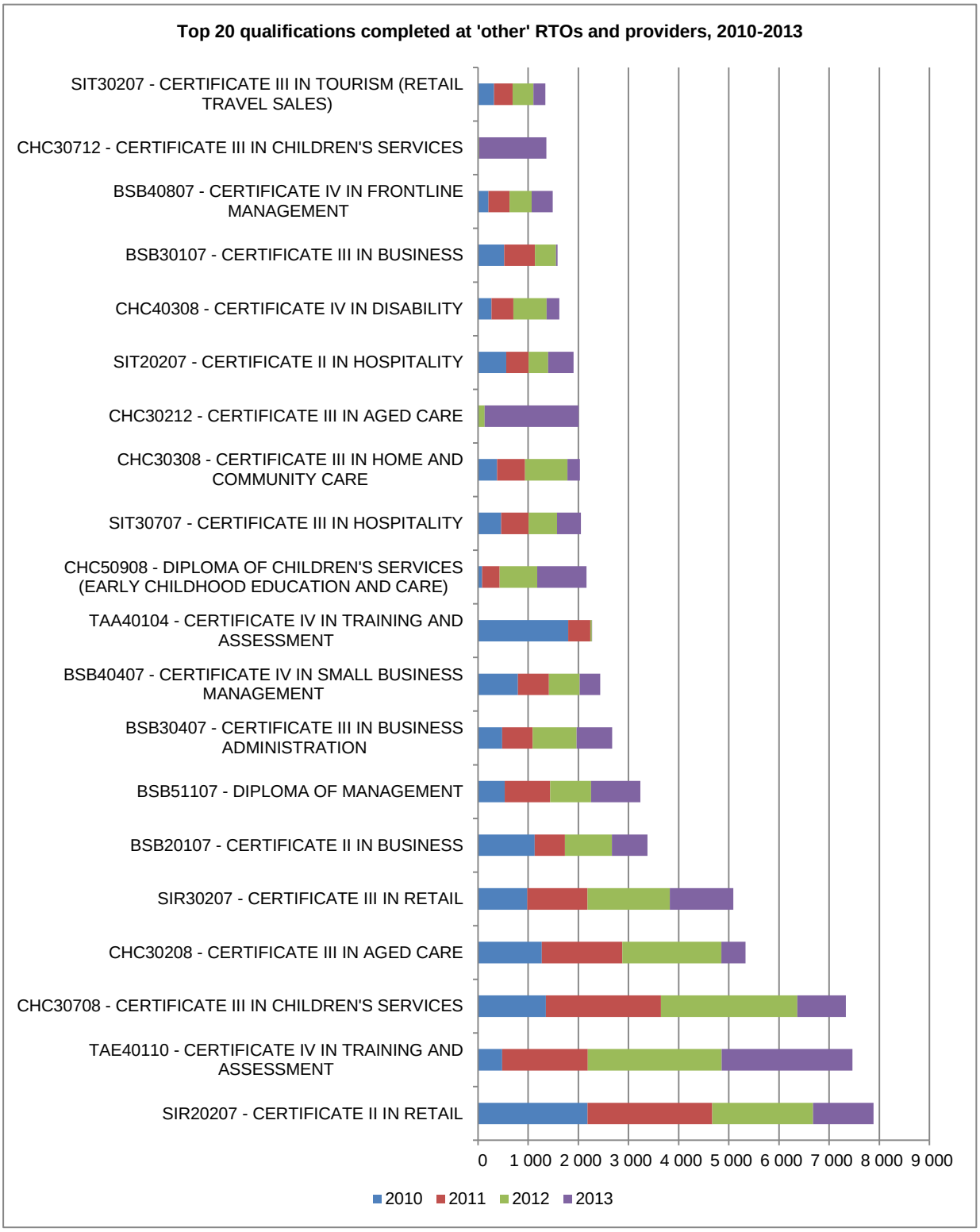
Source: National VET Provider Collection, 2014.

Figure 81 Top 20 qualifications completed at private providers in government-funded VET by name of qualification, 2010–13



Source: National VET Provider Collection, 2014.

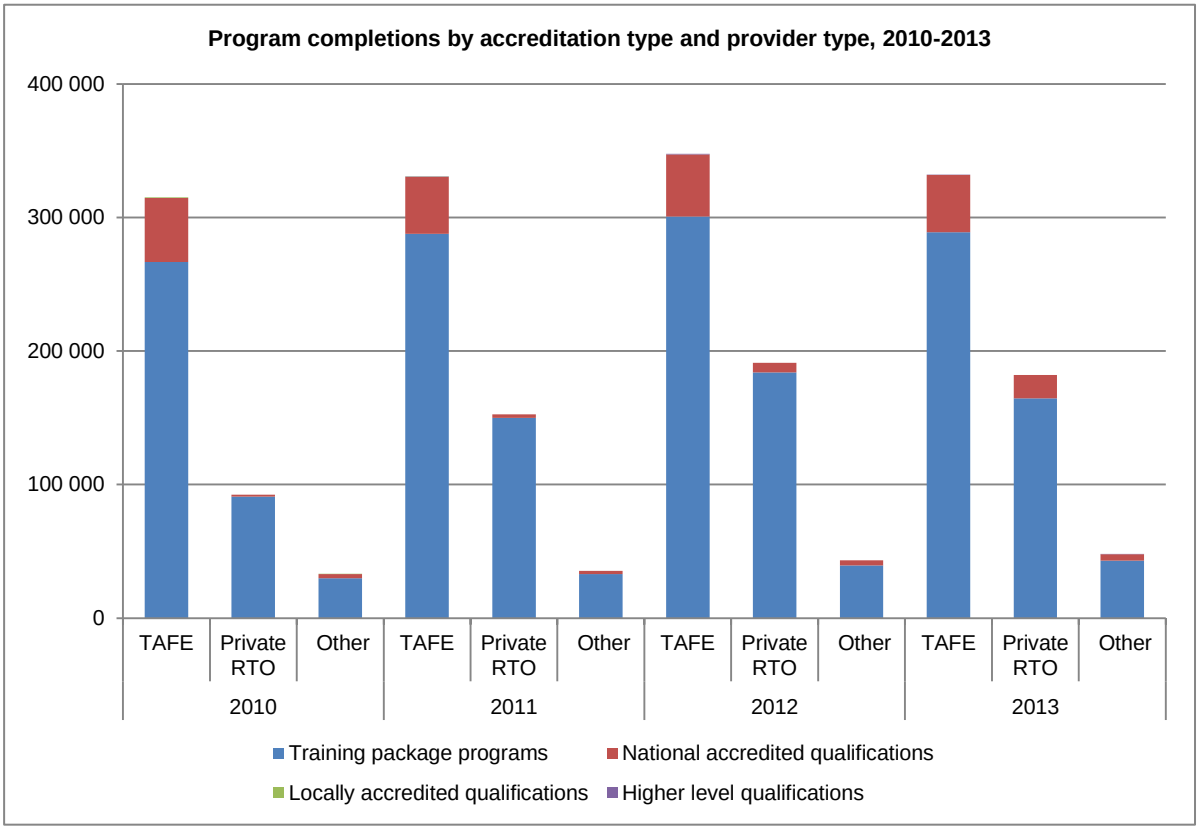
Figure 82 Top 20 qualifications completed at 'other' RTOs in government-funded VET by name of qualification, 2010–13



Source: National VET Provider Collection, 2014.

We can look even more closely at completions by examining the numbers for the different types of programs; that is, training package programs, nationally accredited qualifications, locally accredited qualifications and higher-level qualifications.[1] This analysis shows that the highest number of completions are for training package programs and nationally accredited qualifications completed in TAFE. Completions in these areas are also the most common for all other providers, albeit with a much lower number.

Figure 83 Program completions in government-funded VET by accreditation type for different provider types 2010–13



Source: National VET Provider Collection, 2014.

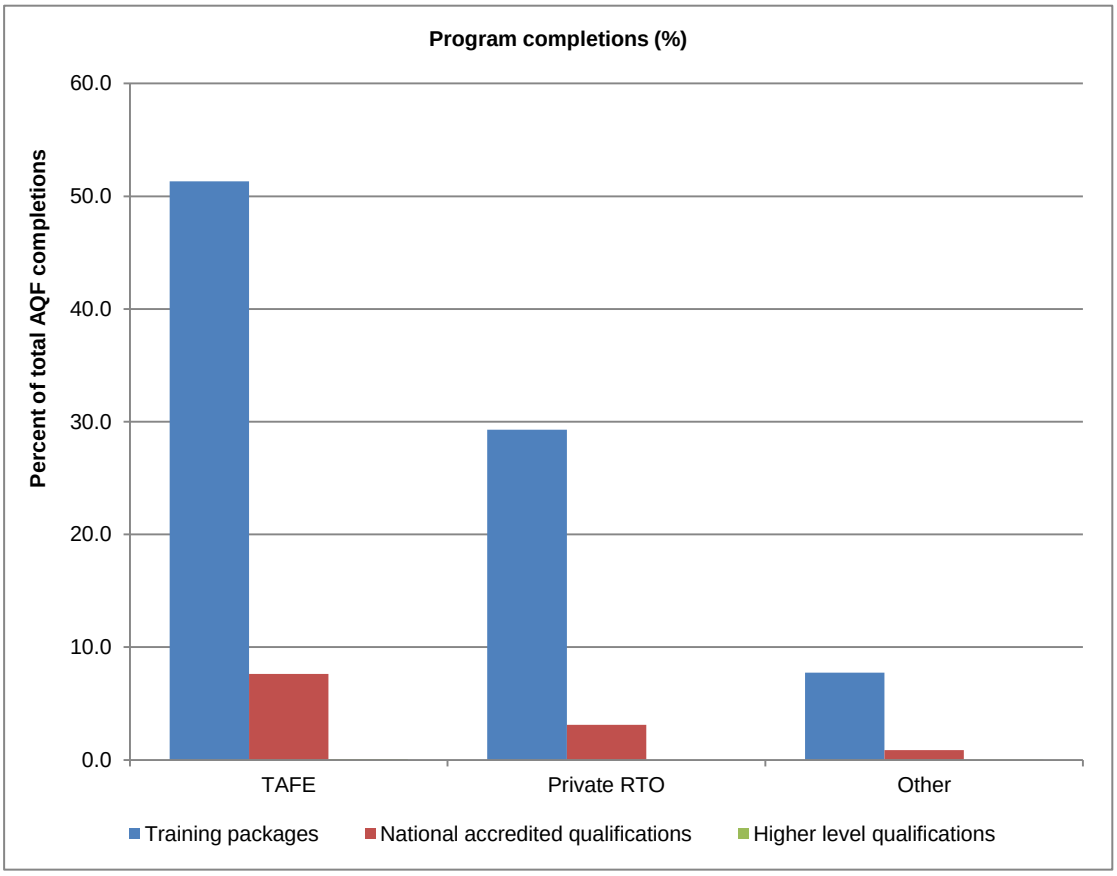
To look at the shares by percentage, we can also take the percentage of total completions for each type of qualification by each type of provider. We find that TAFE produced just under half (48.5%) of the total share of training package qualification completions, private RTOs almost a third and 'other' RTOs and providers around 7%. This pattern was repeated for all types of qualification completions. TAFE produced two-thirds of the completions in national accredited qualifications, and almost 90% of all higher-level qualification completions.

If we just look at total completions, in which the numbers of training package qualifications, national accredited qualifications and higher-level qualifications are aggregated, and take the share of total completions for each qualification type and then identify the share of the total produced by TAFE, private RTOs and 'other' RTOs and providers, we find that just over half of the share are training package completions produced by TAFE, under a third are those produced by private RTOs, and the remainder produced by 'other' RTOs and providers. The highest completions of nationally accredited course

[1] These comprise Diplomas, Associate Degrees, Advanced Diplomas, Degrees (Honours/Pass), Graduate Certificates and Graduate Diplomas that have been accredited by state or territory government accrediting authorities or Higher Education institutions with self-accrediting authority.

qualifications are those produced by TAFE, with the share produced by private RTOs being almost half that of TAFE.

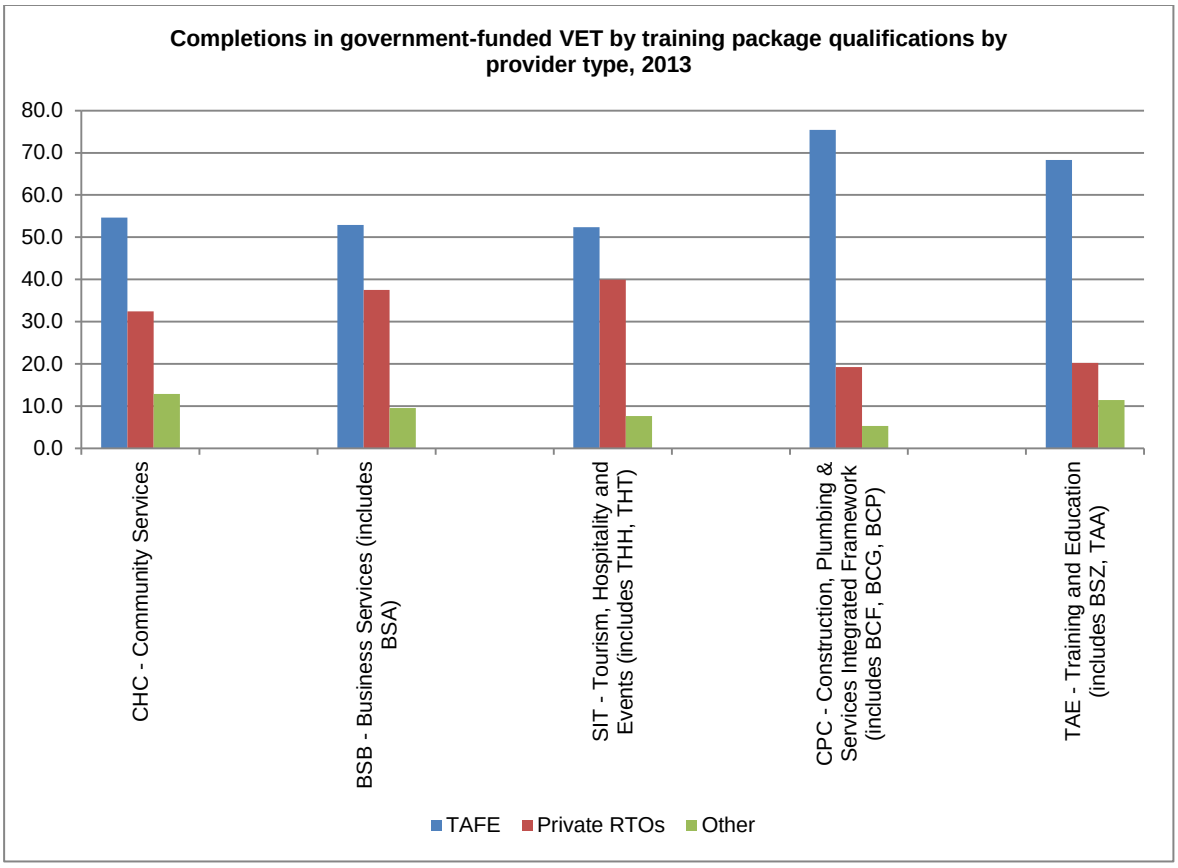
Figure 84 Shares of total completions in government-funded VET for different providers by type of qualification 2010–13



Note: TAFE's very small number of completions is barely visible on the graph.
Source: National VET Provider Collection, 2014.

We focus on the top five of these areas, which include the suite of subjects from the training package qualifications in community services; business services; tourism, hospitality and events; construction, plumbing services and integrated framework; and training and education. Across these training packages (including for various specified versions) the greatest share of completions for TAFE are qualifications in construction, plumbing and integrated framework, followed by training and education, community services, business services, and tourism, hospitality and events. For private RTOs the top five shares of completions were qualifications in tourism, hospitality and events, followed by business services and community services. The lowest were for completions in training and education, and construction, plumbing services and integrated framework.

Figure 85 Percentage shares for completions in government-funded VET by training package qualifications by provider type, 2013



Source: National VET Provider Collection, 2013.

Notes: Program completions for:

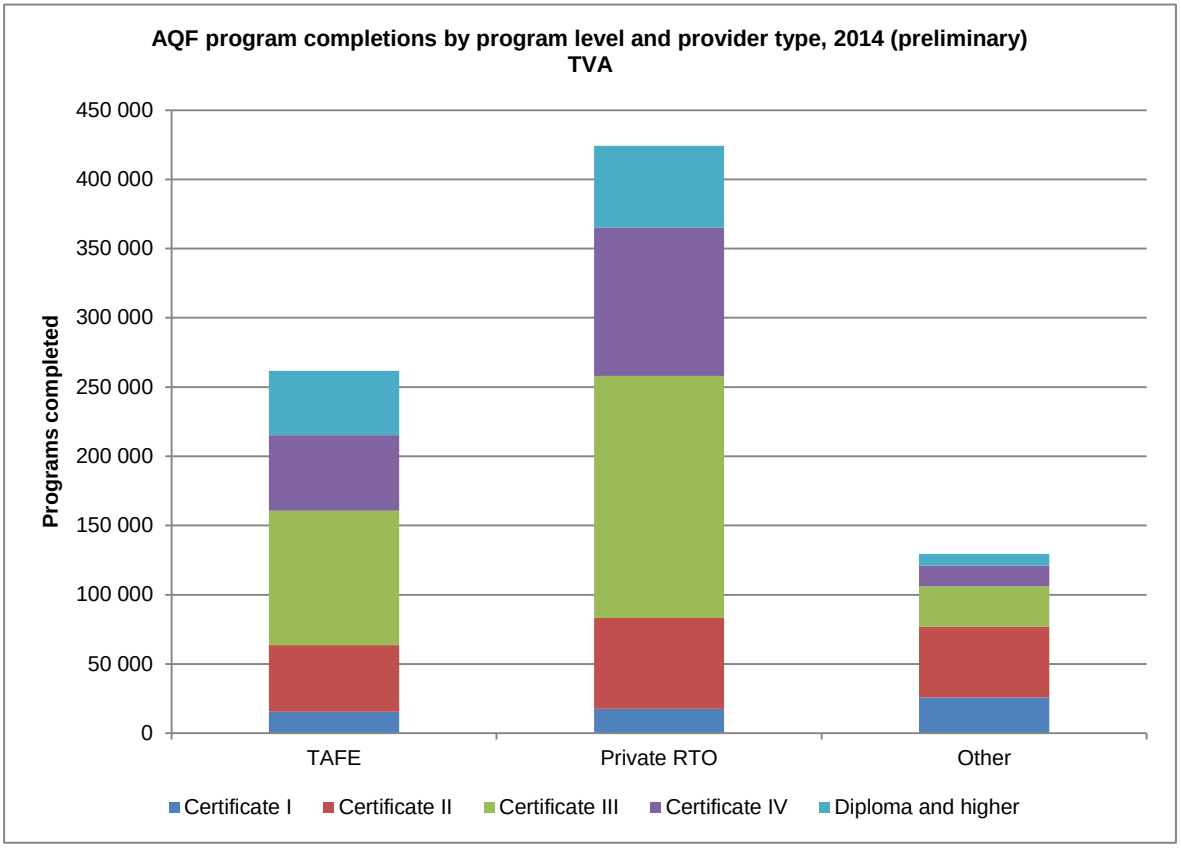
- Construction and plumbing services include those for construction. For construction they include the Construction and Plumbing Services and Integrated Framework (BCF, BCP and BCG training packages).
- Training and education include those covered by the BSZ and the TAA.
- Community services include those from the CHC Community Services Training Package.
- Business services include those from by the BSB and BSA training packages.
- Tourism, hospitality and events include those for SIT, THH and THT training packages.

TVA program completions

From the 2014 TVA collection we can get a different view of the market share of completions held by the different provider types. Private providers had 52% of the total share of these qualifications, TAFE had 32% and 'other' RTOs and providers had 16%. Private RTOs also had just over half (52%) of the market share of diploma and above qualifications, while TAFE's share was just under 40%. Private providers also had the highest share of certificate IV qualifications. For this qualification private providers also had just over 60% of the share, while TAFE had almost a third, and 'other' RTOs had a 10% share.

The certificate III completions market is also dominated by private providers, who have 43% of the share by comparison with TAFE, with 32% of the share. The certificate I market, to some extent, is captured by 'other' providers, who have 73% of the market share compared with 26% for TAFE and 30% for private RTOs. Nevertheless, when the non-TAFE provider shares are combined, they represent 86% of the market.

Figure 86 AQF program completions for different provider types, TVA 2014, preliminary data



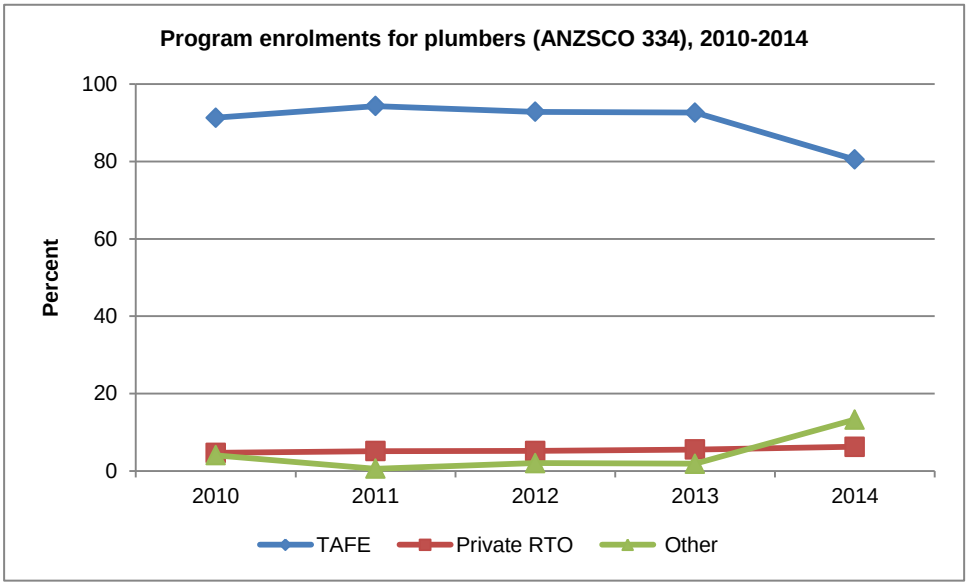
Source: National VET Provider Collection and National VET in Schools Collection, 2014.

Training activity for plumbing, electrical and aged care programs

Government-funded training

To understand where the apprenticeship and traineeship activity is taking place, we take the ANZSCO code to determine occupations and then identify whether the training is being delivered at TAFE, private RTOs or 'other' RTOs and providers. The grouping for 'other' RTOs and providers includes those for enterprises. We do this for each of the years 2010—14. We find that just over 90% of the share of plumbing program enrolments in 2010 were for TAFE. However, the trend stayed relatively stable, moving upwards slightly in the early part of the period, until it dropped sharply in 2014. For private RTOs the trend has stayed relatively stable, at around five or 6%, while for 'other' RTOs the trend has been downwards for most of the period, but in 2014 increased threefold. In 2013 non-TAFE RTOs and providers had almost 20% of the market share, mostly accounted for by 'other' RTOs and providers, which include enterprise providers.

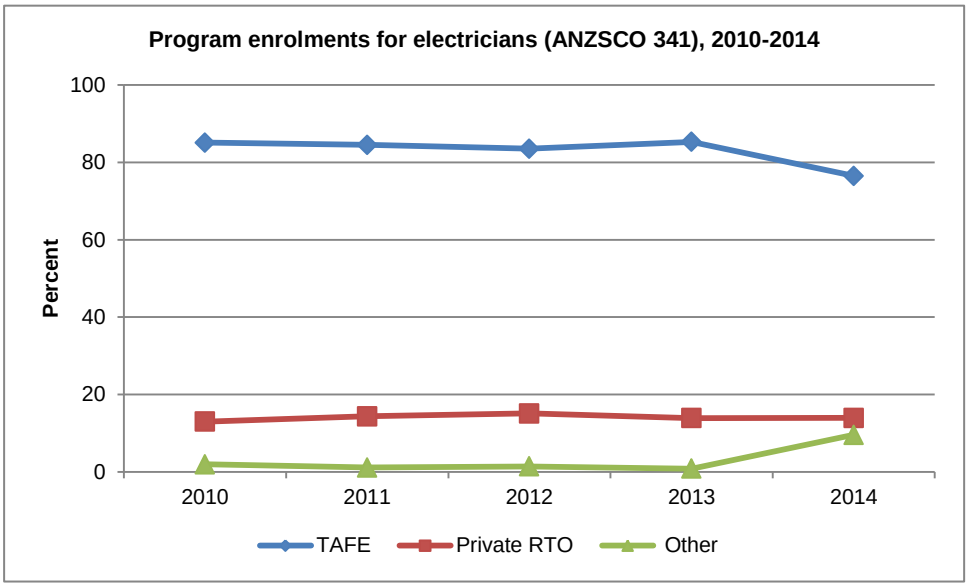
Figure 87 Program enrolments for plumbers in government-funded VET by different provider types, 2010–13



Source: National VET Provider Collection, 2014.

TAFE also has the greatest share of enrolments for electrical apprentices and these trends have remained relatively stable, at around the 85% mark; however, they too dropped in 2014, by eight percentage points. The share of enrolments for electrical apprentices with non-TAFE providers stayed relatively stable across the period, at around the 14% mark, but they experienced some minor fluctuations. The most movement has been in the shares for 'other' RTOs. In 2010 they stood at just 2% of the market; by 2014 this had climbed to 10% of the market.

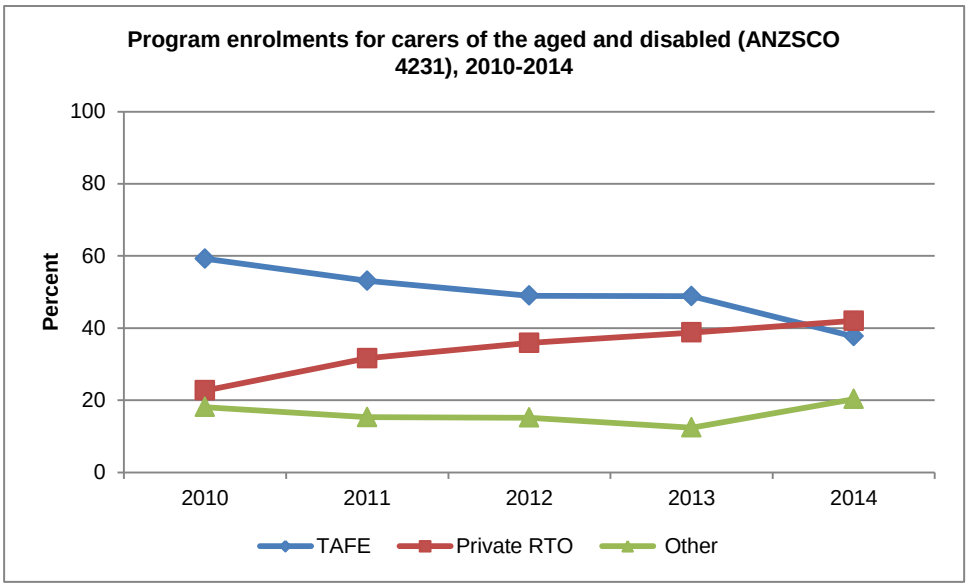
Figure 88 Program enrolments for electrical apprentices in government-funded VET by provider types, 2010–14



Source: National VET Provider Collection, 2014.

The TAFE share of enrolments for aged care and disability services trainees has been declining. Where in 2010 TAFE had almost 60% of the share, this had dropped to under 40% by 2014. By comparison, the share for private RTOs has almost doubled from its 2010 figure. For other RTOs it has fluctuated between 12 and 20%.

Figure 89 Program enrolments for carers of the aged and disabled in government-funded VET by provider types, 2010–14

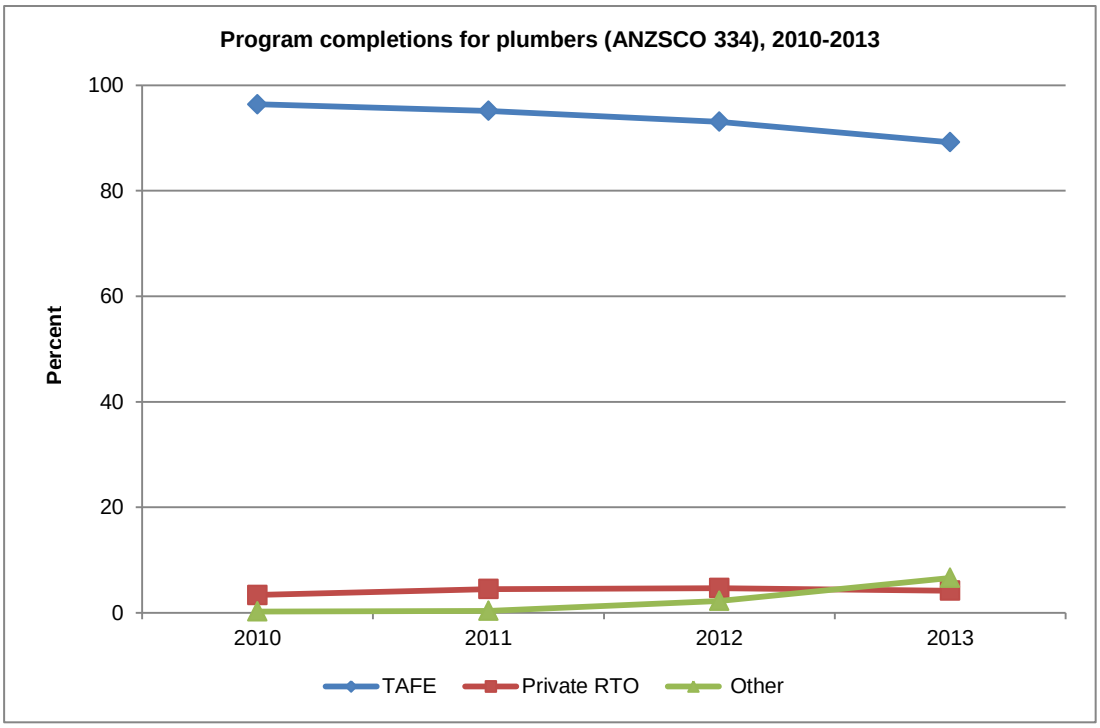


Source: National VET Provider Collection, 2014.

Completions

In 2010 there were approximately 3700 completions for plumbing apprentices in TAFE, which represented about 96% of market share. This share has stayed relatively stable but it has decreased slowly year after year, being around 90% in 2013. By contrast, the share of completions for private RTOs has stayed relatively stable, at around 4% of market share. 'Other' RTOs and providers had a minimal share of these completions across the period, although the share was 6% in 2013.

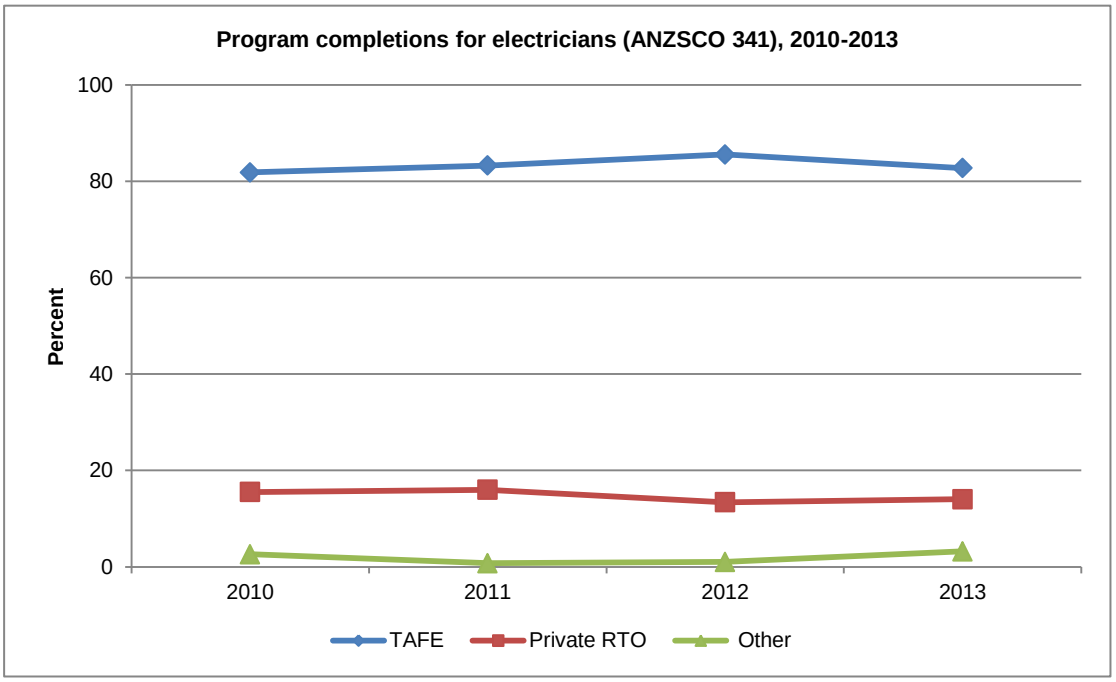
Figure 90 Program completions in government-funded VET by accreditation type for plumbers by provider types, 2010–13



Source: National VET Provider Collection, 2014.

In 2010 there were 5506 TAFE completions for electrical apprentices, accounting for about 80% of the total share. This share has stayed relatively stable across the five-year period, with some fluctuations between 2011 and 2013. Private RTOs had 1044 completions, accounting for 16% of the share. This share has stayed relatively stable throughout the period, being 14% in 2013. 'Other' RTOs had very small numbers of electrical apprentices (176) completions, representing almost 3% of the total in 2010; this share trended downwards during the middle of the period to be at 3% in 2013.The share for non-TAFE RTOs combined was just over 17% in 2013.

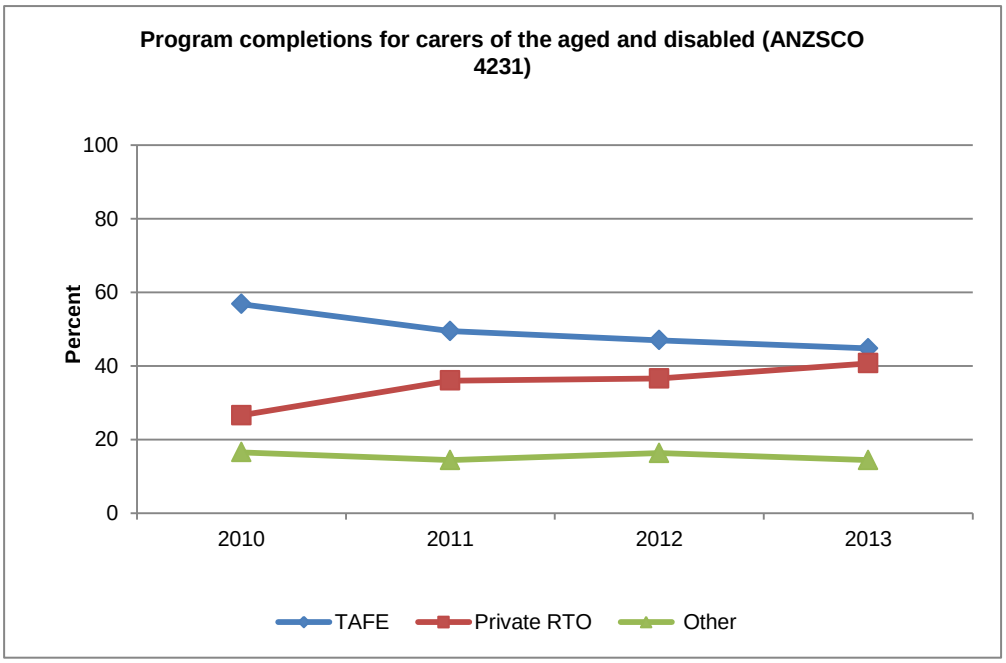
Figure 91 Program completions in government-funded VET by accreditation type for electrical apprentices by provider types, 2010–13



Source: National VET Provider Collection, 2014.

In 2010 there were 7431 TAFE completions for carers of the aged and disabled, accounting for 56% of the total share. Since that time the share has been trending downwards, arriving at 45% in 2013. In 2010 private RTOs had 3478 completions, which represented 27% of the share, a figure almost half that of TAFE; this share has trended upwards and in 2014 private RTOs had produced 41% of completions for this group. The share of completions was much lower for 'other' RTOs and providers. In 2010 they had 2167 completions for this group, to represent 17% of the share for that year. This share has fluctuated between 14 and 16% throughout the period.

Figure 92 Program completions in government-funded VET by accreditation type for carers of the aged and disabled by provider types, 2010–13



Source: National VET Provider Collection, 2014.

Load pass rates

We can also get an indication of the differences in outcomes across providers by looking at the different pass rates for each qualification, non-AQF qualifications, and subject-only courses. By comparison with TAFE and 'other' RTOs, we find that in 2010 the load pass rates for private RTOs are generally the highest, with the exception of diploma or higher qualifications, where 'other' providers have the highest rate, and non-AQF qualifications, where TAFE has the highest rate. This pattern is generally repeated for 2014; however, 'other' providers have the highest pass rates in certificate IV. The pass rates for private RTOs are lower than those of their comparators in certificate I qualifications.

Table 8 Load pass rates in government-funded VET by provider type, 2010–14

	2010	**2010**	**2010**	**2014**	**2014**	**2014**
	TAFE	Private RTO	Other providers	TAFE	Private RTO	Other providers
Diploma or higher	80.6	87.3	89.1	79.8	82.9	83.1
Certificate IV	78.0	88.5	84.4	80.7	84.0	86.9
Certificate III	82.0	91.6	88.2	84.0	90.3	87.0
Certificate II	76.5	92.7	79.6	78.0	90.8	80.9
Certificate I	67.3	77.7	60.4	66.7	62.6	66.9
Non-AQF qualification	76.3	72.8	51.2	75.8	77.3	59.0
Subject only – no qualification	72.5	93.6	81.8	89.2	91.7	87.5

Source: National VET Provider Collection, 2014.

Employment outcomes

Government-funded training

We can get an insight into the employment outcomes of TAFE graduates from full courses and subject-only completers by analysing data on such outcomes from the Students Outcomes Survey between 2011 and 2015. This survey collects information on employment outcomes and the experiences of graduates and subject completers (in the past known as module completers) six months after training. The survey at the present time only surveys individuals in publicly-funded training. Students in fee-for-service programs are only in scope for TAFE providers.

We analyse the information from this survey for all respondents as a group, and then separately for graduates from non-fee-for-service TAFE and other government providers; community education providers; and private providers.[2] We then look at the employment outcomes for graduates from fee-for-service TAFE and other government providers separately. We use the same groupings to look at the employment outcomes of subject completers. We are also interested to report on the employment outcomes of those graduates or subject completers who were not employed before they undertook their course. In this section we only discuss differences when they are statistically significant.[3]

Graduate employment outcomes

Almost 80% of all VET graduates responding to the survey (regardless of sector) were employed six months after training for each of the years between 2011 and 2014. In 2015 the rate dropped to just under 75%. The non-employment rate had gradually increased across the period.

To understand the employment outcomes from private and public providers, we look separately at the non-fee-for-service TAFE and other government providers, as well as those from the fee-for-service TAFE and other government providers. When we analyse the employment outcomes for graduates from non-fee-for-service TAFE and other government providers, we find that just over three-quarters of them were employed six months after training in the years between 2011 and 2014, with the rate dropping slightly in 2015. In 2015 just over a quarter (28%) of the graduates from this group were not in employment. The employment rates for graduates from private providers, at around 80%, for the years between 2011 and 2014 were slightly higher than those from non-fee-for-service TAFE and other government providers. Similarly, the employment rate for private provider graduates also decreased in 2015; this decrease was slightly higher than that for graduates from TAFE and other government providers. Graduates from fee-for-service TAFE and other government (domestic) providers had the best performance. Their employment rate six months after training was over the 85% mark for each of the years between 2011 and 2014. Although the employment rate for these graduates declined, it was still slightly over 80% in 2015.

Graduates from community education programs in most cases had slightly lower employment rates six months after training but the pattern was similar. Just under 75% of these graduates were employed for each of the years between 2011 and 2014; in 2015 this rate was 70%.

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[2] Fee-for-service community education and fee-for-service private providers are not in scope for these collections.

[3] The Student Outcomes Survey was undertaken as a stratified, randomly selected sample, with survey responses weighted to population benchmarks. As the estimates from the Student Outcomes Survey are based on information provided by a sample rather than a population, they are subject to sampling variability; that is, they may differ from the numbers that would have been produced if all graduates or module completers had been included and responded to the survey. By convention, a 95% confidence interval is applied in judging the reliability of survey estimates. See appendix B for confidence intervals used for survey results.

Table 9 Employment of graduates from government-funded TAFE, community education providers, and private providers (%)

	2011	2012	2013	2014	2015
Total government-funded VET					
Employed after training	78.7	77.9	78.1	77.6	74.2
Not employed after training	21.3	22.1	21.9	22.4	25.8
TAFE and other government providers					
Employed after training	77.4	76.1	74.8	74.9	72.3
Not employed after training	22.6	23.9	25.2	25.1	27.7
TAFE and other government providers (fee-for-service domestic)					
Employed after training	86.7	87.7	88.8	87.7	82.2
Not employed after training	13.3	12.3	11.2	12.3	17.8
Community education providers – Commonwealth/state funding					
Employed after training	74.6	68.9	74.4	73.1	70.0
Not employed after training	25.4	31.1	25.6	26.9	30.0
Private providers – Commonwealth/state funding					
Employed after training	79.3	78.9	80.2	78.8	74.5
Not employed after training	20.7	21.1	19.8	21.2	25.5
Total respondents	45 694	20 515	49 726	34 605	44 803

Source: Student Outcomes Survey, 2011–15.

Employment outcomes in the states and territories

If we just look at the differences in employment outcomes for publicly-funded non-fee-for-service TAFE and non-government providers and compare these with the outcomes for graduates from fee-for-service TAFE and community education and private providers in 2015, we find that graduates from the TAFE fee-for-service programs perform the best across the states and territories for every year. Graduates from fee-for-service TAFE and other government providers (domestic) generally perform better than the fee-for-service TAFE and other government providers in Tasmania, Western Australia, New South Wales, Victoria, Northern Territory and the Australian Capital Territory. The differences were the most pronounced for Tasmania, where fee-for-service TAFE and other government providers outperformed the state's non-fee-for service TAFE counterparts by 20 percentage points. In Western Australia and New South Wales the difference between the two groups in favour of the fee-for-service TAFE and other government providers was 13.5 percentage points; in Victoria it was 11.7 percentage points, in the Northern Territory, 11.6 percentage points, and in the Australian Capital Territory it was 9.5 percentage points.

If we look at the employment rates of graduates from private providers in 2015 we find that they underperformed graduates from fee-for-service TAFE and other government (domestic) providers in Victoria, Queensland, Western Australia, Tasmania, Northern Territory and the Australian Capital Territory. They only outperformed graduates from fee-for-service TAFE and other government (domestic) providers in New South Wales. They underperformed graduates from non-fee-for-service TAFE and other government providers in Victoria and Queensland. They outperformed graduates from non-fee-for-service TAFE in New South Wales, South Australia, Western Australia and Tasmania.

The non-employment rates for private providers were lowest in New South Wales; they were highest for Victoria and Queensland.

Employment outcomes for subject completers

For all publicly-funded VET we find that around 75% of subject completers are employed six months after training. This was the case for every year between 2011 and 2015. The rate of non-employment fluctuated slightly over the five-year period, with it peaking at 28% in 2015.

If we take the subject completers for non-fee-for-service TAFE and other government providers, we find that the employment rate (at around 66%) across each of the years is substantially lower than that for all VET graduates in publicly-funded VET.

For subject completers from non-fee-for-service TAFE and other government providers, and fee-for-service TAFE and other government providers combined, the rate of employment six months after training (at around 75%) constituted a pattern generally similar to that observed for all publicly-funded VET respondents.

The employment rates for subject completers from fee-for-service TAFE and other government providers tell a different story. Here the employment rate (at around 85%) is considerably higher than that for subject completers and graduates from all VET programs and providers, and for private providers.

When we take subject completers from the private providers as a separate group, we find that around 75% of them were in employment six months after training for each of the five years between 2011 and 2015. The employment rates of subject completers dropped slightly in 2015, as it did for the other groups.

The findings tell us that in 2015 subject completers from non-fee-for-service TAFE and other government providers, closely followed by those from community education providers, experienced the highest rate of non-employment. Subject completers in fee-for-service programs from TAFE or other government providers experienced the lowest rate of non-employment.

Table 10 Employment of subject completers from government-funded TAFE, community, and private providers (%)

	2011	2012	2013	2014	2015
	%	%	%	%	%
Total government-funded VET					
Employed after training	75.6	73.1	74.8	74.1	72.5
Not employed after training	24.4	26.9	25.2	25.9	27.5
TAFE and other government providers - Commonwealth/state funding					
Employed after training	67.6	65.6	66.9	67.4	64.8
Not employed after training	32.4	34.4	33.1	32.6	35.2
TAFE and other government providers - (fee-for-service domestic)					
Employed after training	86.0	84.2	85.2	83.8	81.9
Not employed after training	14.0	15.8	14.8	16.2	18.1
Community education providers Commonwealth/state funding					
Employed after training	67.1	65.1	71.3	65.4	65.6
Not employed after training	32.9	34.9	28.7	34.6	34.4
Private training providers Commonwealth/state funding					
Employed after training	75.1	74.4	74.9	75.7	71.0
Not employed after training	24.9	25.6	25.1	24.3	29.0

Source: Student Outcomes Survey, 2011–15.

Employment outcomes in the states and territories

When we look at the employment outcomes of VET subject completers across the states and territories in 2015 and compare these with those of graduates, the patterns change, with the subject completers from all the states and territories (with the exception of Western Australia) experiencing lower employment rates than seen for graduates. In all these states and territories, the drop is considerable. For graduates from non-fee-for-service TAFE and other government providers, the differences in employment rates are 18 percentage points for South Australia, 12 percentage points for the Australian Capital Territory, and around 10 percentage points for New South Wales, Queensland, and Tasmania. The employment rates of subject completers from Victoria and the Northern Territory were just six percentage points below those of graduates from these states.

However, when we compare the employment rates of *subject completers* from fee-for-service TAFE and other government providers (domestic) with those from non-fee-for-service TAFE and other government providers, we find that the former outperforms these counterparts considerably. In New South Wales and South Australia the difference between the two groups was around 25 percentage points in favour of the fee-for-service TAFE and other government providers (domestic); in Tasmania and the Australian Capital Territory it was around 20 percentage points; in Victoria and the Northern Territory it was around 13 percentage points and in Queensland and Western Australia it was around 10 percentage points. Across all jurisdictions, except Queensland, the employment rate for subject completers from fee-for-service TAFE and other government providers was over 80%; for Queensland it was 75%.

When we examine the employment rates of *graduates* from private providers we find that they underperformed those from fee-for-service TAFE and other government providers only in South Australia,

Victoria and the Australian Capital Territory. However, they outperformed the employment rates for graduates from non-fee–for service TAFE and other government providers in all jurisdictions except Victoria and the Northern Territory. Details on confidence intervals are provided in appendix B.

Employment outcomes for those not employed before training

Knowing whether someone was employed six months after training gives us some idea of training effectiveness but it does not tell the whole story. It is important to understand whether graduates or subject completers move from non-employment to employment.

Graduates

When we look at these data for the different provider types for all 'not employed before training VET graduates' as a whole, we find that, across 2010 and 2015, between 40% and 50% of not employed before training VET graduates found employment. However, the rate has been trending downwards since 2011. The same general pattern was observed for all VET graduates, and those from non-fee-for-service TAFE and other government providers, fee-for-service TAFE and other government providers, and private providers. In 2015 where rates dropped across the board, private providers produced employment rates that were slightly higher.

Table 11 Employment of graduates who had not been employed prior to their training from government-funded TAFE, community, and private providers

	2011	2012	2013	2014	2015
	%	%	%	%	%
Total government-funded VET					
Employed after training	47.9	46.9	43.7	44.4	41.2
Not employed after training	52.1	53.1	56.3	55.6	58.8
TAFE and other government providers					
Employed after training	46.2	44.3	40.7	42.3	39.6
Not employed after training	53.8	55.7	59.3	57.7	60.4
TAFE and other government providers (fee-for-service domestic)					
Employed after training	47.8	46.0	43.2	49.9	35.3
Not employed after training	52.2	54.0	56.8	50.1	64.7
Community education providers Commonwealth/state funding					
Employed after training	50.6	39.7	46.5	42.1	42.9
Not employed after training	49.4	60.3	53.5	57.9	57.1
Private training providers Commonwealth/state funding					
Employed after training	51.8	52.4	48.3	47.2	43.6
Not employed after training	48.2	47.6	51.7	52.8	56.4
Respondents	11 701	5 836	11 775	10 160	13 115

Source: Student Outcomes Survey, 2011–15.

The non-employment rate for these 'not employed before training graduates' from fee-for service and non-fee-for-service TAFE and other government providers, and those from community education providers consistently stayed around the 50%—60% mark. Rates were considerably lower for private providers than they were for non-fee-for-service TAFE and other government provider group. For these providers they stayed around the 50% mark.

Subject completers

Across the period, the employment rates for the 'not employed before training subject completers' were generally much lower than for graduates. They stayed around the 30% mark for those subject completers from non-fee-for-service TAFE and other government providers, at just over 35% for fee-for-service TAFE and other government providers; and around the 25% mark for subject completers from community education providers. Private providers produced employment rates which generally stayed around the 40% mark. In 2013, 40% of previously not employed before training subject completers from fee-for-service TAFE and other government providers (domestic) found a job six months after training. They outperformed those from non-fee-for-service TAFE and other government providers, which were at 28%.

Accordingly, the proportions of these subject completers who did not find a job were around 70% for TAFE and other government providers, and over 70% for community education providers. Around 60% of subject completers from fee-for-service TAFE and other government providers (domestic) and private providers did not find a job six months after training.

Table 12 Employment of subject completers who had not been employed prior to their training from government-funded TAFE, community, and private providers

	2011	2012	2013	2014	2015
	%	%	%	%	%
Total government-funded VET					
Employed after training	33.6	33.8	32.9	33.0	33.2
Not employed after training	66.4	66.2	67.1	67.0	66.8
TAFE and other government providers					
Employed after training	31.7	32.7	28.4	29.9	29.5
Not employed after training	68.3	67.3	71.6	70.1	70.5
TAFE and other government providers (fee-for-service domestic)					
Employed after training	36.5	36.8	40.3	38.4	33.4
Not employed after training	63.5	63.2	59.7	61.6	66.6
Community education providers – Commonwealth/state funding					
Employed after training	27.0	25.8	33.4	26.3	23.6
Not employed after training	73.0	74.2	66.6	73.7	76.4
Private training providers – Commonwealth/state funding					
Employed after training	43.1	40.5	36.8	38.9	41.9
Not employed after training	56.9	59.5	63.2	61.1	58.1
Respondents	11 701	5 836	11 775	10 160	13 115

Source: Student Outcomes Survey, 2011–15.

In appendix B, tables B1 to B5, we provide the confidence intervals for the findings displayed in each of the preceding tables in this section.

Government-funded VET finance

Movements in revenues and expenditures are necessarily driven by changes in government policy initiatives and social and economic contexts. Total revenues and expenditures have closely aligned in the past. This pattern changed in 2013 and 2014, with operating revenues now exceeding operating expenditures.

Operating revenues and expenditures have been impacted by the training activity over the reporting period.

In addition, reported totals need to be considered in the context of the changes occurring in the VET system over the time series. In 2014 two states had unusual events that impacted on 2014 reporting these include:

- The introduction of the *Education and Training Reform Amendment (Dual Sector Universities) Bill* in Victoria, which provided greater autonomy to the dual sector universities by removing the TAFE status of the dual-sector entities and therefore TAFE reporting obligations. As a result, a full set of financial information for the four dual sector universities was not included in VET financial reporting in the 2014 reporting year. This has resulted in decreasing variances across the reporting lines in the Victorian financial statements and has consequently impacted on aggregate totals at the national level.
- In Queensland, the ownership and management of Queensland's training assets was transferred to the Queensland Training Assets Management Authority (QTAMA) in July 2014 and TAFE was required to lease land and buildings from QTAMA at a commercial rental rate.

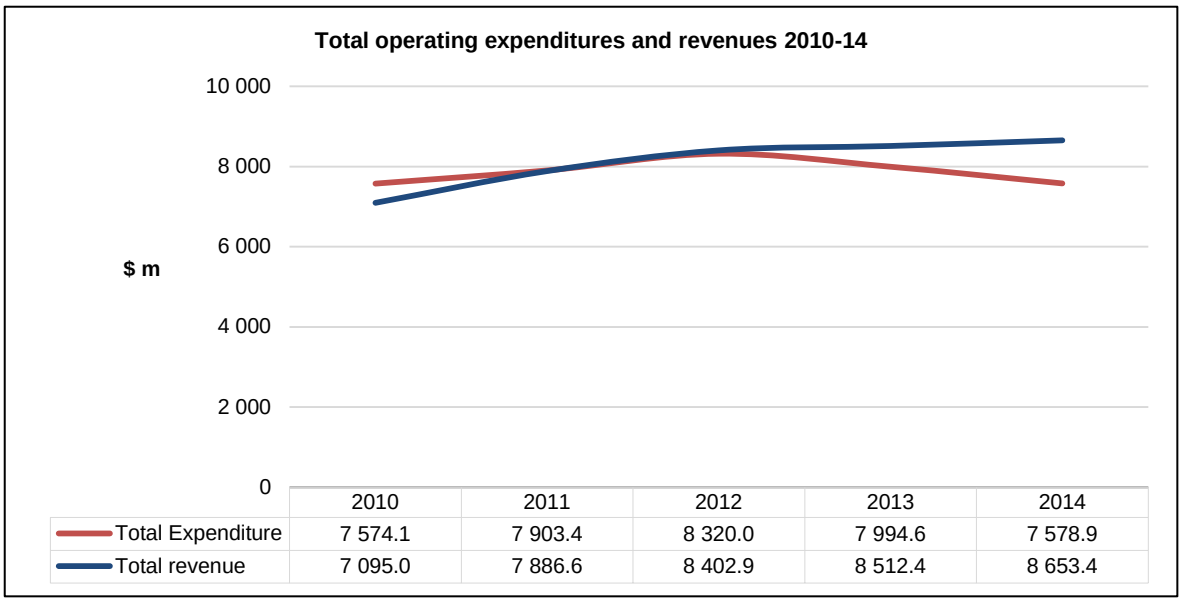
The reforms formalised under the 2012 National Partnership Agreement on Skills Reform are currently transitioning through the VET system. Of relevance to financial VET data are: the expansion of the VET FEE-HELP program; the student entitlement to training through any registered training organisation; and strategies undertaken to enable the government-funded VET providers to operate competitively. The jurisdictions are at various stages of implementing or adjusting their reforms, meaning that VET financial information should be considered in the context of the changes occurring at the jurisdictional level.

Operating revenues and expenditures

In 2014, total operating revenues and expenditures (including those for Commonwealth and state and territory governments) stood at $8653.4 million, with expenditures at $7578.9 million. This represented a gradual increase in total operating revenues across the five-year period. The story for total operating expenditures is more nuanced, with figures rising between 2010 and 2012 and dropping steadily from that time until 2014.

Over the five-year period total expenditures remained relatively stable, with expenditures for 2014 surpassing those for 2010 by just under $5 million. However, expenditures in 2011, 2012 and 2013 were relatively higher. They peaked in 2012 at $8320.0 million and gradually dropped by about $325.4 in 2013 and by $416 million in 2014.

Figure 93 Total operating expenditures and revenues 2010–14

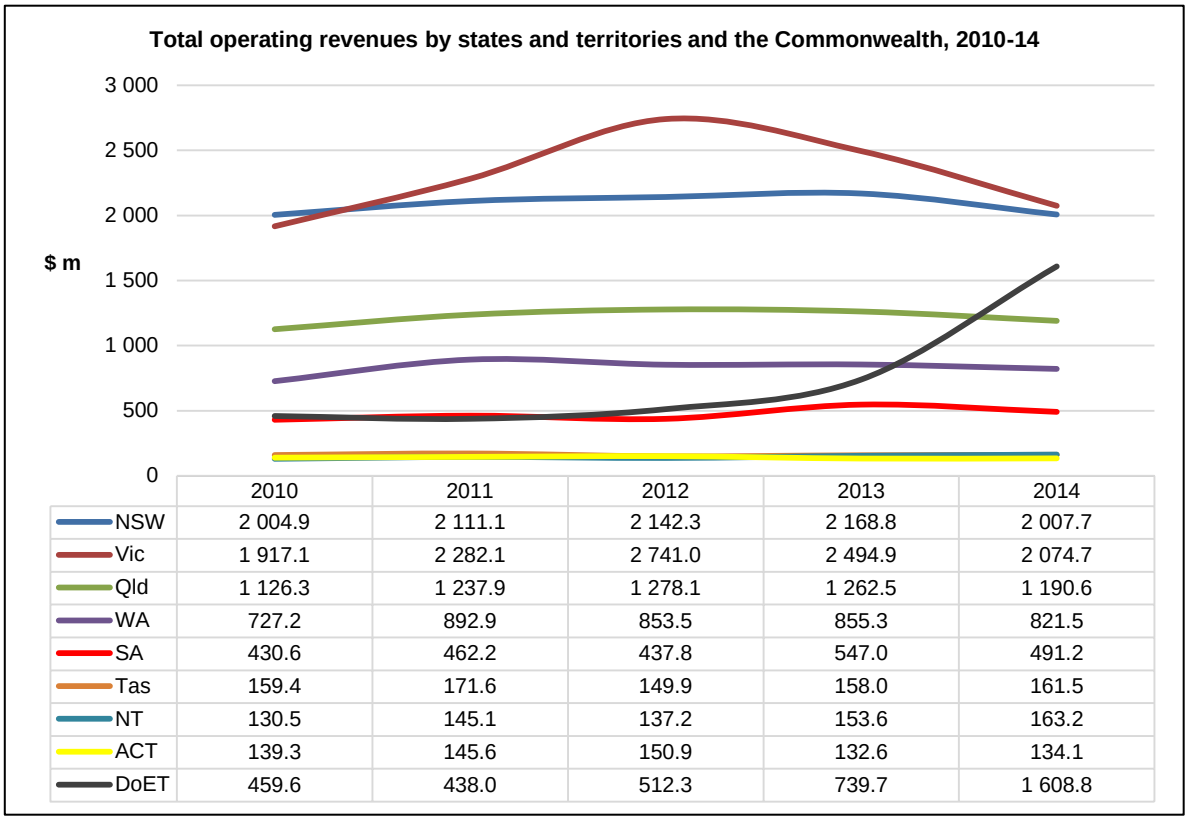


	2010	2011	2012	2013	2014
Total Expenditure	7 574.1	7 903.4	8 320.0	7 994.6	7 578.9
Total revenue	7 095.0	7 886.6	8 402.9	8 512.4	8 653.4

Source: National Finance Collection, 2014.

The total operating revenues for Victoria were subject to the greatest variations, which occurred between 2010 and 2012. Although Victoria experienced a significant drop from 2012 to 2014, its revenues are still greater than all other jurisdictions. New South Wales revenues were the highest in 2010 and the second highest for all years after that. Unlike Victoria, it has not experienced the same peaks and troughs, although revenues also dropped between 2013 and 2014. Revenues for the other jurisdictions have remained relatively stable.

Figure 94 Total operating revenues by states and territories and the Commonwealth, 2010–14



	2010	2011	2012	2013	2014
NSW	2 004.9	2 111.1	2 142.3	2 168.8	2 007.7
Vic	1 917.1	2 282.1	2 741.0	2 494.9	2 074.7
Qld	1 126.3	1 237.9	1 278.1	1 262.5	1 190.6
WA	727.2	892.9	853.5	855.3	821.5
SA	430.6	462.2	437.8	547.0	491.2
Tas	159.4	171.6	149.9	158.0	161.5
NT	130.5	145.1	137.2	153.6	163.2
ACT	139.3	145.6	150.9	132.6	134.1
DoET	459.6	438.0	512.3	739.7	1 608.8

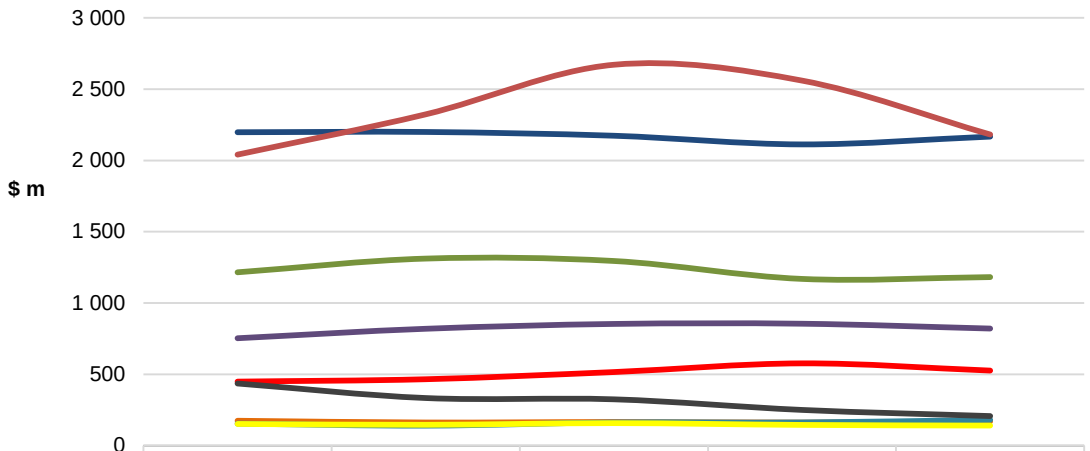
Source: National Finance Collection, 2014.

Victoria and South Australia have entitlement to training models in place and both states have adjusted their models with a number of containment measures, Victoria in 2012 and 2013, and South Australia in 2014. Over this reporting period, New South Wales has no entitlement to training program in place, as its model (Smart and Skilled) became effective January 2015.

Revenue for the Australian Government (represented by the Department of Employment and Training) increased dramatically from 2012 to 2014, although it is still significantly lower than the two top performing states. However, many Commonwealth VET programs are not included in the National VET financial data collection, as funding is incentive-based and therefore not considered a direct cost to training.

Increases in 2012 and onwards are a result of the expansion of the VET FEE-HELP program. The revenue for the Australian Government includes VET FEE-HELP loan payments for students undertaking training with a private VET provider.

Figure 95 Operating expenditures by states and territories 2010–14



	2010	2011	2012	2013	2014
NSW	2 197.9	2 199.7	2 173.3	2 112.5	2 167.2
Vic	2 040.9	2 323.4	2 671.0	2 560.0	2 181.9
Qld	1 215.6	1 311.8	1 294.9	1 169.3	1 182.0
WA	753.2	819.7	853.5	855.0	821.3
SA	449.2	465.8	516.2	577.1	526.3
Tas	174.7	162.4	165.7	162.0	170.8
NT	154.5	140.3	162.5	162.8	180.9
ACT	152.2	146.3	158.0	145.3	141.0
DoET	435.9	334.0	324.9	250.6	207.6

Source: National Finance Collection, 2014.

A similar pattern is found for total operating expenditure for Victoria, with expenditures falling quite substantially in 2014 and returning to almost what they were in 2010 (this may be due changes in reporting for dual-sector providers). Expenditures also dropped for the Australian Capital Territory and Western Australia, and for the Commonwealth Government. They increased for the remaining jurisdictions.

As the VET system moves towards competitive neutrality as a result of the National Partnership Agreement on Skills Reform, and depending on the level of training activity over the reporting period, we would expect to see a number of changes across the expenditure reporting lines. In addition, as the VET system brings in a number of efficiency measures to allow their TAFEs to operate more competitively, we may see

decreases in the overall total. To understand this pattern more clearly, we need to interrogate the individual reporting lines for both revenues and expenditures over time.

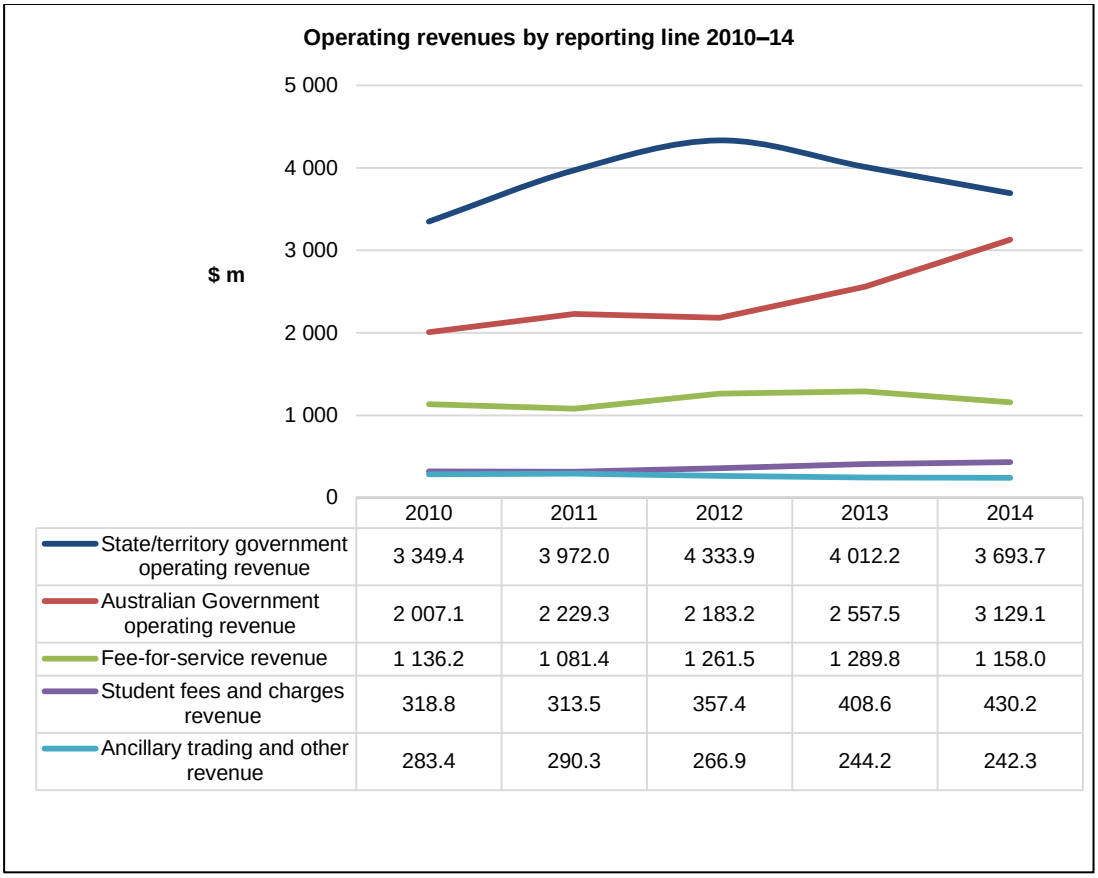
Operating revenues by reporting line

Total operating revenue from all states and territory governments stood at $3349.4 million in 2010. By 2012 it had added almost another $1000 million. From 2012 revenues began to decrease, and by 2014 there was a $640.2 million decline.

Operating revenues for the Commonwealth Government were $2007.1 million in 2010. By 2014 these had risen to $3129.1 million, representing an increase of just over $1100 million. Between 2010 and 2014 revenues had a number of fluctuations. There was a steep increase between 2012 and 2014.

Table 13 details these two revenue lines further.

Figure 96 Operating revenues by reporting line 2010–14



	2010	2011	2012	2013	2014
State/territory government operating revenue	3 349.4	3 972.0	4 333.9	4 012.2	3 693.7
Australian Government operating revenue	2 007.1	2 229.3	2 183.2	2 557.5	3 129.1
Fee-for-service revenue	1 136.2	1 081.4	1 261.5	1 289.8	1 158.0
Student fees and charges revenue	318.8	313.5	357.4	408.6	430.2
Ancillary trading and other revenue	283.4	290.3	266.9	244.2	242.3

Source: National Finance Collection, 2014.

The National Partnership Agreement — Productivity Places Program was active between 2010 and 2012 and then ceased. The National Partnership Agreement on Skills Reform began in 2012. The payment schedule of this agreement is milestone-driven, with substantial payments made in the 2013 reporting year. These were for structural change at the jurisdictional level, while payments for training outcomes were made in the 2015 reporting year.[4]

[4] National Partnership Agreement on Skills Reform (p.10), viewed 29 February 2016, <http://www.federalfinancialrelations.gov.au/content/npa/skills/skills-reform/national_partnership.pdf>.

Table 13 Note to the financial statements: revenue from government ($' million)

Revenue from government	2010	2011	2012	2013	2014
National agreement	1 173.1	1 273.7	1 333.5	1 355.1	1 394.0
Commonwealth recurrent	48.0	53.8	53.1	59.7	47.4
State recurrent – general	3 160.3	3 809.9	4 211.9	3 945.4	3 607.8
State – Productivity Places	109.0	91.3	24.5	0.0	0.0
Commonwealth Administered programs	60.0	47.0	52.6	24.9	24.1
NP – Productivity Places	429.7	490.2	291.6	0.1	0.0
NP – Skills Reform	0.0	0.0	0.0	408.9	63.6
Commonwealth – Other	296.3	364.6	452.4	708.9	1 600.0
Assumption of liabilities	77.4	67.4	91.9	59.0	81.4
Resources received free of charge	2.7	3.4	5.7	7.8	4.5
Total operating revenue from government	5 356.6	6 201.4	6 517.1	6 569.8	6 822.8

Source: National Finance Collection, 2014.

The Australian Government reports VET FEE-HELP loans to students undertaking training with a private training provider with the reporting line Commonwealth — other revenue (table 13), and we can see that this revenue line increased sharply in 2013 and 2014.

In 2010 revenues for fee-for-service provision stood at $1136.2 million; by 2014 they had risen slightly to $1158 million. Although this represented a slight increase on 2010 figures, the 2014 figures showed a drop from those of 2012 and 2013.

However, government-funded training activity on the whole decreased in 2014 from 2013. In addition, the dual sector university changes in Victoria impacted on 2014 reporting, while the National Workforce Development Fund closed to new applicants in 2014, as the program is to be superseded by the Industry Skills Fund, effective from January 2015.

Revenues from student fees and charges stood at just under $320 million in 2010. Apart from a slight dip of about five million in 2011, it has gradually increased over the five-year period. In 2014 it stood at $430.2 million, representing an increase of approximately $111 million from 2010.

The entitlement to training model in place at the jurisdictional level will have an impact on the student contribution to training. As each approach to the entitlement initiative is localised to suit the skill needs of the different states and territories, eight different models have resulted. This means that subsidised courses and eligibility to subsidised training differ for each model. Some jurisdictions subsidise higher qualifications, while others only up to certificate III levels. Some jurisdictions only guarantee subsidised training for priority skill areas, while others have adopted uncapped course fees. The student financial contributions to their training may increase according to these changes.

In 2010 the total amount of revenues from trading and other activities stood at just over $280 million; there was a slight increase in 2011. Since that time these revenues have been trending downwards. In 2013 and 2014 they stood at just over $240 million.

Operating expenditures by reporting line

Total employee costs trended upwards between 2010 and 2012. Since that time they have been trending downwards, with the greatest drop experienced in 2014, when they stood at $3735.9. This represented a drop of 9.6% on 2013 figures.

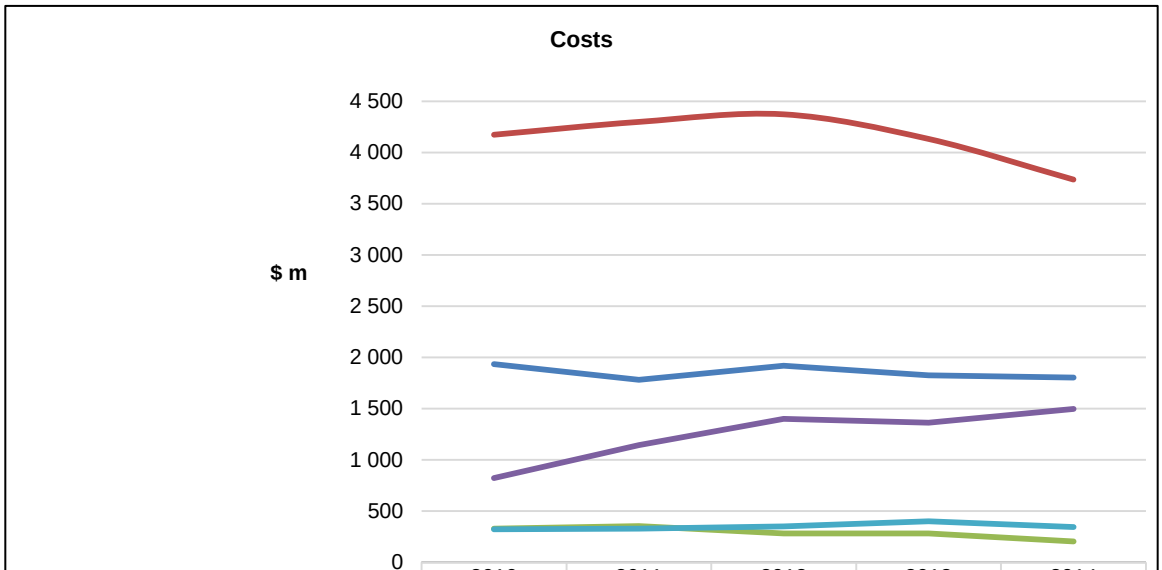
Between 2010 and 2014 the costs for supplies and services experienced fluctuations. In 2010 they stood at just under $2000 million; they declined slightly in 2011 but picked up again in 2012. Since that time there has been a steady decline. By 2014 costs had decreased to $1803.5, which represented a drop of $19.2 million and 1.1% decrease on the previous year.

Expenditures for grants and subsidies have generally been trending downwards after a small rise in 2011. In 2010 they stood at almost $330 million; they peaked in 2011, at just over $350 million, and then dropped substantially in 2012. In 2014 costs fell to just over $200 million, representing a 28% decrease from the previous year.

Payments to non-TAFE providers have trended upwards for all years except 2013, when they dipped slightly, to recover and rise again, in 2014. In 2014 these payments were $1497.0 million, almost double what they were in 2010. Payments increased substantially in 2011 and 2012, dipped slightly in 2013 and peaked in 2014. In 2014 payments peaked at almost $1500 million, representing a 9.9% increase on the previous year.

In 2010 depreciation and amortisation expenses stood at almost $320 million, rising steadily up to 2012 to peak in 2013. They fell to around $342 million in 2014. Although this was higher than figures in 2010, it had declined by 14% on figures for the year before.

Figure 97 Operating expenditures by reporting line 2010–14



	2010	2011	2012	2013	2014
Employee	4 174.1	4 299.4	4 373.2	4 132.7	3 735.9
Supplies and services	1 932.5	1 780.1	1 918.0	1 822.7	1 803.5
Grants and subsidies	328.0	353.1	280.3	279.3	200.1
Payments to non-TAFE providers	819.7	1 143.6	1 400.3	1 361.9	1 497.0
Depreciation and amortisation	319.8	327.2	348.3	398.1	342.3

Source: National Finance Collection, 2014.

VET FEE-HELP loans and operating revenues

In 2009 the Australian Government made available an income-contingent loan, similar to that for university students, to eligible VET students undertaking approved higher-level qualifications. These qualifications, which are at diploma, advanced diploma, graduate certificate and graduate diploma levels, must be undertaken with an approved provider. In 2016 the government is trialling the scheme for certificate IV level students. VET FEE-HELP loans are not subject to income or asset tests. There is a loan fee of 20% for fee-for-service VET FEE-HELP loans. Students can defer all of the tuition fees, or pay some of the tuition fees upfront and defer the balance.

Since its inception VET FEE-HELP has provided just over $3 billion to eligible students, between 2009 and 2014. In 2009 the published total amount provided for eligible students at public and private providers for that year was just over $25 million. The following year it was almost $118 million. In 2014 a published total amount of approximately $1.8 billion had been provided for eligible students for that year. Eligible students training with private providers have made most use of the loans, and over the five-year period they have been provided with a loan amount of just over $2 billion. The amount provided to public provider students for the same period was just under $800 million. This means that almost 75% of the total loan amount for the five-year period went to eligible students training with private providers compared with 25% going to eligible students training with public providers.

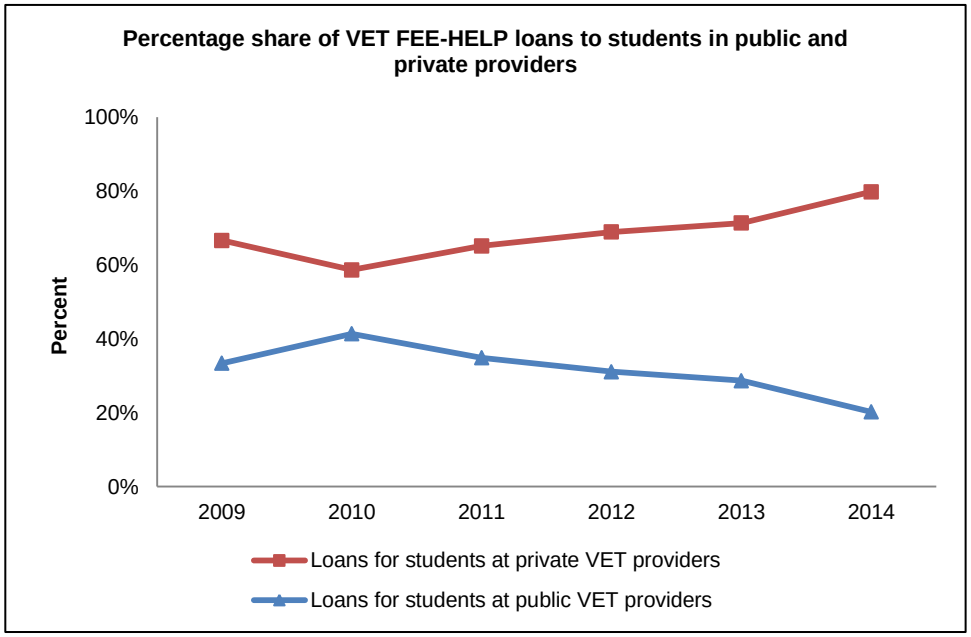
Table 14 VET FEE-HELP loans for all students by public and private providers, 2009–14 ($)

	Total	2014	2013	2012	2011	2010	2009
Loans for students at private VET providers	2 344 093 108	1 401 934 125	498 803 109	223 684 360	133 700 388	68 939 565	17 031 561
Loans for students at public VET providers	785 496 090	355 370 062	200 439 508	100 933 070	71 570 469	48 636 352	8 546 629
Total loans	**3 129 589 198**	**1 757 304 187**	**699 242 617**	**324 617 430**	**205 270 857**	**117 575 917**	**25 578 190**

Source: Data provided by the Australian Department of Education and Training: VET FEE-HELP statistics.

The pattern of private provider students receiving the greatest share of total loans than public provider students for that year was repeated for every year between 2009 and 2014. In 2014 almost 80% of loans available that year went to private provider students. In 2009 just over one-third of the total amount for loans available to eligible students that year were provided to students from the public providers; by 2014 the percentage share for public provider students for that year had decreased to 20%. Although the share of loans for public provider students had increased to 41.4% of the total for 2010 (the year after VET FEE-HELP became available), it began to decrease steadily each year after that. Accordingly, the VET FEE-HELP loan amount for private provider students decreased that year from the figure of the year before, but in contrast to the trend for public provider students, their share has increased every year after that.

Figure 98 Percentage share of VET FEE-HELP loans to students in public and private providers (%)



Source: Data provided by the Australian Department of Education and Training: VET FEE-HELP statistics.

In Appendix C we report details on the percentage split of total loans provided to students from private and public providers.

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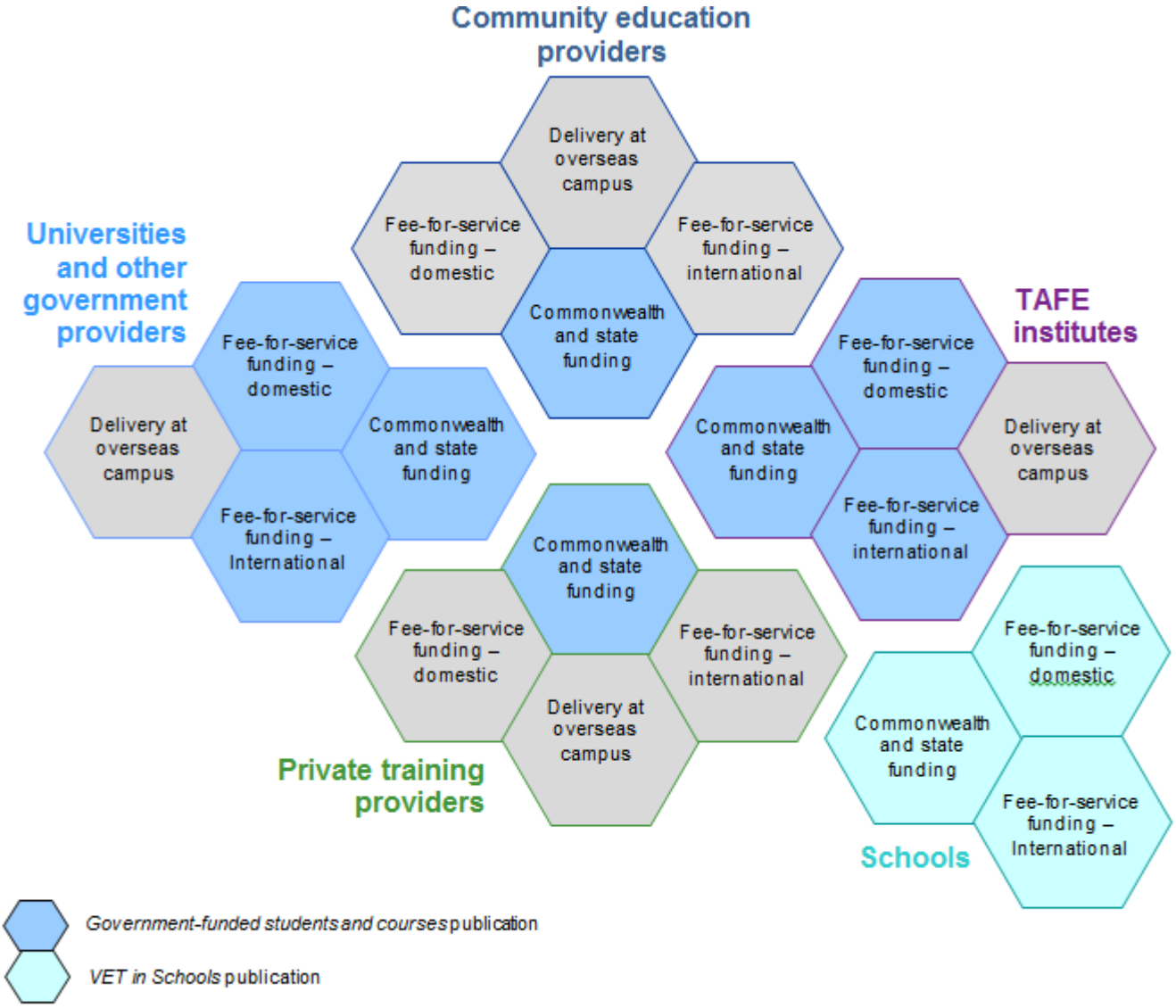
——2015a, *Students and courses: terms and definitions*, NCVER, Adelaide.

—— 2015b, *Student Outcomes Survey*, NCVER, Adelaide.

Appendix A: Government-funded training



Appendix B: Confidence intervals for findings on employment outcomes

Table B1 Confidence intervals for key outcome measures for government-funded graduates by provider type and funding source, 2011–15

95% Confidence intervals	2011	2012	2013	2014	2015
	+/-	+/-	+/-	+/-	+/-
TAFE and other government providers – Commonwealth/state funding					
Employed after training	0.6	1.0	0.6	0.9	0.6
Not employed after training	0.6	1.0	0.6	0.9	0.6
TAFE and other government providers – (fee-for-service domestic)					
Employed after training	1.1	1.8	0.9	1.3	1.2
Not employed after training	1.1	1.8	0.9	1.3	1.2
Community education providers – Commonwealth/state funding					
Employed after training	6.0	6.0	3.0	2.9	1.8
Not employed after training	6.0	6.0	3.0	2.9	1.8
Private training providers – Commonwealth/state funding					
Employed after training	0.9	2.2	1.6	1.0	1.8
Not employed after training	0.9	2.2	1.6	1.0	1.8
Total government-funded VET					
Employed after training	0.5	1.0	0.7	0.6	0.8
Not employed after training	0.5	1.0	0.7	0.6	0.8

Source: Student Outcomes Surveys 2006–15.

Table B2 Confidence Intervals for key outcome measures for government-funded subject completers by provider type and funding source, 2011–15

95% Confidence intervals	2011	2012	2013	2014	2015
	+/-	+/-	+/-	+/-	+/-
TAFE and other government providers – Commonwealth/state funding					
Employed after training	1.1	1.9	1.0	2.6	1.3
Not employed after training	1.1	1.9	1.0	2.6	1.3
TAFE and other government providers – (fee-for-service domestic)					
Employed after training	0.7	1.5	0.8	2.2	0.9
Not employed after training	0.7	1.5	0.8	2.2	0.9
Community education providers – Commonwealth/state funding					
Employed after training	4.2	4.6	3.5	5.8	3.8
Not employed after training	4.2	4.6	3.5	5.8	3.8
Private training providers – Commonwealth/state funding					
Employed after training	1.5	3.0	2.8	2.3	2.7
Not employed after training	1.5	3.0	2.8	2.3	2.7
Total government-funded VET					
Employed after training	0.7	1.2	0.8	1.4	0.9
Not employed after training	0.7	1.2	0.8	1.4	0.9

Source: Student Outcomes Surveys, 2011–15.

Table B3 Confidence intervals for key outcome measures for government-funded graduates employed before training, by provider type and funding source, 2011–15

95% Confidence intervals	2011	2012	2013	2014	2015
	+/-	+/-	+/-	+/-	+/-
TAFE and other government providers – Commonwealth/state funding					
Employed after training	0.5	0.8	0.5	0.8	0.6
Not employed after training	0.5	0.8	0.5	0.8	0.6
TAFE and other government providers – (fee-for-service domestic)					
Employed after training	0.8	1.2	0.7	1.1	1.0
Not employed after training	0.8	1.2	0.7	1.1	1.0
Community education providers – Commonwealth/state funding					
Employed after training	5.2	5.7	2.5	2.4	1.7
Not employed after training	5.2	5.7	2.5	2.4	1.7
Private training providers – Commonwealth/state funding					
Employed after training	0.8	2.0	1.4	0.9	1.4
Not employed after training	0.8	2.0	1.4	0.9	1.4
Total government-funded VET					
Employed after training	0.4	0.8	0.6	0.5	0.6
Not employed after training	0.4	0.8	0.6	0.5	0.6

Source: Student Outcomes Surveys, 2011–15.

Table B4 Confidence intervals for key outcome measures for government-funded graduates not employed before training, by provider type and funding source, 2011–15

95% Confidence Intervals	2011	2012	2013	2014	2015
	+/-	+/-	+/-	+/-	+/-
TAFE and other government providers – Commonwealth/state funding					
Employed after training	1.3	2.2	1.2	1.8	1.2
Not employed after training	1.3	2.2	1.2	1.8	1.2
TAFE and other government providers – (fee-for-service domestic)					
Employed after training	4.2	7.1	4.1	6.0	3.6
Not employed after training	4.2	7.1	4.1	6.0	3.6
Community education providers –Commonwealth/state funding					
Employed after training	11.0	10.5	5.7	5.7	3.1
Not employed after training	11.0	10.5	5.7	5.7	3.1
Private training providers – Commonwealth/state funding					
Employed after training	2.0	5.0	4.0	2.4	3.6
Not employed after training	2.0	5.0	4.0	2.4	3.6
Total government-funded VET					
Employed after training	1.1	2.2	1.6	1.4	1.6
Not employed after training	1.1	2.2	1.6	1.4	1.6

Source: Student Outcomes Surveys, 2011–15.

Table B5 Confidence intervals for key outcome measures for government-funded subject completers employed before training, by provider type and funding source, 2011–15

95% Confidence intervals	2011	2012	2013	2014	2015
	+/-	+/-	+/-	+/-	+/-
TAFE and other government providers – Commonwealth/state funding					
Employed after training	0.9	1.8	0.9	2.0	1.2
Not employed after training	0.9	1.8	0.9	2.0	1.2
TAFE and other government providers – (fee-for-service domestic)					
Employed after training	0.5	1.2	0.6	1.8	0.7
Not employed after training	0.5	1.2	0.6	1.8	0.7
Community education providers – Commonwealth/state funding					
Employed after training	3.3	3.8	3.1	5.1	2.9
Not employed after training	3.3	3.8	3.1	5.1	2.9
Private training providers – Commonwealth/state funding					
Employed after training	1.4	2.4	2.5	1.9	2.4
Not employed after training	1.4	2.4	2.5	1.9	2.4
Total government-funded VET					
Employed after training	0.5	0.9	0.7	1.1	0.7
Not employed after training	0.5	0.9	0.7	1.1	0.7

Source: Student Outcomes Surveys, 2011–15.

Appendix C: VET FEE-HELP (%)

Table C1 VET FEE-HELP Percentage share split by provider type 2009–14

	Total	2014	2013	2012	2011	2010	2009
Loans for students at private VET providers	74.9	79.8	71.3	68.9	65.1	58.6	66.6
Loans for students at public VET providers	25.1	20.2	28.7	31.1	34.9	41.4	33.4
Total Loans	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Source: Data provided by the Australian Department of Education and Training: VET FEE-HELP statistics.

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