# VICTORIAN TRAINING MARKET SNAPSHOT 2018

Two years on from the implementation of the Skills First reforms, the new training market settings are showing positive impacts on training quality, with improved outcomes for key industries and student cohorts, particularly throughout the TAFE Network. Student and employer satisfaction towards training outcomes point to general stability in training quality across the government-funded training system. This report provides detailed information on the student and provider profiles of the government-funded training market in Victoria over the 2018 calendar year.

## National Comparison

The number of students at TAFE and other government providers in Victoria grew by 2.1 per cent, higher than the national average growth of 0.9 per cent. The Skills First reforms have led to a deliberate shift from high-volume to high-quality training, with overall government-funded VET in Victoria continuing to contract in 2018 – in line with national trends.

## Learner Cohorts

TAFE Network providers have increased their training delivery to Indigenous students and early school leavers, while ACE providers continue to lead in Foundation enrolments. The training system continues to support all Victorians to have access to high quality training that supports their learning needs and leads to strong job outcomes.

## Jobs and Skills

The share of enrolments in Government priority areas increased to 35 per cent in 2018, compared to 31 per cent in 2017. Training is growing Victoria’s pool of skilled workers, particularly in government priority areas. Government-funded enrolments increased in courses related to the NDIS, Family Violence and Apprenticeships.

## TAFE Network

The TAFE network share of students increased from 36.9 per cent in 2016 to 43.1 per cent in 2017 and to 46.9 per cent in 2018. The Skills First refocusing continues to increase TAFE market share, placing the TAFE Network at the centre of the Victorian training system.

## Quality Training

77.5 per cent of students who left training in 2018 were satisfied with their training, up 1.0 percentage point compared to the 2016 cohort. The Skills First suite of reforms continue to strengthen training quality, with continued improvements in both student and employer satisfaction outcomes.

## NATIONAL COMPARISONS

In 2018, 270,965 students were enrolled in government-funded vocational education and training (VET) in Victoria, a decrease of 8.5 per cent compared to 2017. This decline was in line with national trends, with student numbers across Australia reducing by 1.9 per cent over the same period. Note that the figures presented in the National Comparisons section are compiled by the National Centre for Vocational Education Research (NCVER). They differ slightly from the Victorian data because of the application of a number of different statistical treatments to ensure consistency across jurisdictions and the inclusion of training activity funded by other Ministerial portfolios or the Commonwealth. The Victorian decline is a result of the transitioning of the training system from a high quantity to a high quality system.

The TAFE Network is showing an increase in the number of government-funded students, reflecting Victoria’s commitment under Skills First to restore confidence in the TAFE and training system. The number of students at TAFE and other government providers in Victoria grew by 2.1 per cent, higher than the national average growth rate of 0.9 per cent.

Skills First continues to strengthen the performance of the TAFE system, with students at TAFE providers (and Dual-Sector Universities) accounting for 46.9 per cent of all Victorian government-funded students in 2018.

In 2018, 6.3 per cent of working age Victorians participated in government-funded VET, which is slightly lower than the national participation rate of 6.8 per cent.

The number of students at TAFE and other government providers in Victoria has increased for the third consecutive year, with these providers now training almost half of all government-funded students in Victoria.

In 2018, 49.5 per cent of government-funded students in Regional Victoria were training at TAFE Network providers, compared to 46.1 per cent across Metropolitan Melbourne.

### Chart 1. Change in government-funded students at TAFE and other government providers (2017 to 2018)

Victoria had a 2.1 per cent increase in government-funded students at TAFE and other government providers between 2017 and 2018.

New South Wales had a 2.7 per cent increase in government-funded students at TAFE and other government providers between 2017 and 2018.

Queensland had a 3.9 per cent decrease in government-funded students at TAFE and other government providers between 2017 and 2018.

South Australia had a 2.8 per cent decrease in government-funded students at TAFE and other government providers between 2017 and 2018.

Western Australia had a 0.9 per cent decrease in government-funded students at TAFE and other government providers between 2017 and 2018.

Tasmania had a 2.7 per cent increase in government-funded students at TAFE and other government providers between 2017 and 2018.

Northern Territory had an 11.1 per cent decrease in government-funded students at TAFE and other government providers between 2017 and 2018.

Australian Capital Territory had a 6.1 per cent increase in government-funded students at TAFE and other government providers between 2017 and 2018.

Australia had a 0.9 per cent increase in government-funded students at TAFE and other government providers between 2017 and 2018.

The source for this chart is NCVER VOCSTATS, Government-funded students and courses, 2018.

### Table 1. Estimated participation rate of people aged 15-64 in VET, by state and territory

The participation rate in Victoria was 7.8 per cent in 2016, 7.1 per cent in 2017 and 6.3 per cent in 2018. There was a -0.7 percentage point change from 2017 to 2018.

The participation rate in New South Wales was 8.3 per cent in 2016, 7.6 per cent in 2017 and 7.7 per cent in 2018. There was a 0.1 percentage point change from 2017 to 2018.

The participation rate in Queensland was 6.8 per cent in 2016, 6.6 per cent in 2017 and 6.5 per cent in 2018. There was a -0.1 percentage point change from 2017 to 2018.

The participation rate in South Australia was 6.3 per cent in 2016, 6.0 per cent in 2017 and 6.0 per cent in 2018. There was a 0.0 percentage point change from 2017 to 2018.

The participation rate in Western Australia was 6.6 per cent in 2016, 6.2 per cent in 2017 and 6.0 per cent in 2018. There was a -0.2 percentage point change from 2017 to 2018.

The participation rate in Tasmania was 8.5 per cent in 2016, 8.0 per cent in 2017 and 7.8 per cent in 2018. There was a -0.2 percentage point change from 2017 to 2018.

The participation rate in Northern Territory was 12.2 per cent in 2016, 11.5 per cent in 2017 and 10.2 per cent in 2018. There was a -1.3 percentage point change from 2017 to 2018.

The participation rate in Australian Capital Territory was 5.6 per cent in 2016, 5.9 per cent in 2017 and 6.2 per cent in 2018. There was a 0.3 percentage point change from 2017 to 2018.

The participation rate in Australia was 7.5 per cent in 2016, 7.0 per cent in 2017 and 6.8 per cent in 2018. There was a -0.2 percentage point change from 2017 to 2018.

The sources for this table are the Australian Bureau of Statistics (ABS), Australian Demographic Statistics, December 2018, tables 51-59, cat. no. 3101.0.; and NCVER VOCSTATS, Government-funded students and courses, 2018.

Note that participation rates for 2016 and 2017 differ slightly from those reported in the Victorian Training Market Snapshot 2017, due to revisions to both the NCVER series (to de-duplicate student counts) and the ABS series (as population estimates are revised with each publication).

### Table 2. Students in government-funded training by state or territory and provider type, 2018

In Victoria, there were 129,805 government-funded students at TAFE and other government providers in 2018, which is a 2.1 per cent change from 2017. There were 38,330 government-funded students at Community education providers in 2018, which is a -1.8 per cent change from 2017. There were 86,850 government-funded students at Other providers in 2018, which is a -21.4 per cent change from 2017. There were 15,985 government-funded students attending more than one provider type in 2018, which is a -18.4 per cent change from 2017. In total there were 270,965 students in government-funded training in Victoria in 2018, which is a -8.5 per cent change from 2017.

In New South Wales, there were 244,750 government-funded students at TAFE and other government providers in 2018, which is a 2.7 per cent change from 2017. There were 12,350 government-funded students at Community education providers in 2018, which is a 20.8 per cent change from 2017. There were 117,670 government-funded students at Other providers in 2018, which is a 0.7 per cent change from 2017. There were 26,125 government-funded students attending more than one provider type in 2018, which is a 2 per cent change from 2017. In total there were 400,890 students in government-funded training in New South Wales in 2018, which is a 2.5 per cent change from 2017.

In Queensland, there were 57,570 government-funded students at TAFE and other government providers in 2018, which is a -3.9 per cent change from 2017. There were 4,005 government-funded students at Community education providers in 2018, which is a -4.3 per cent change from 2017. There were 134,185 government-funded students at Other providers in 2018, which is a 3.2 per cent change from 2017. There were 16,010 government-funded students attending more than one provider type in 2018, which is a -12.3 per cent change from 2017. In total there were 211,770 students in government-funded training in Queensland in 2018, which is a -0.3 per cent change from 2017.

In South Australia, there were 38,715 government-funded students at TAFE and other government providers in 2018, which is a -2.8 per cent change from 2017. There were 2,840 government-funded students at Community education providers in 2018, which is a 14.3 per cent change from 2017. There were 18,255 government-funded students at Other providers in 2018, which is a 4.2 per cent change from 2017. There were 6,410 government-funded students attending more than one provider type in 2018, which is a -5.1 per cent change from 2017. In total there were 66,220 students in government-funded training in South Australia in 2018, which is a -0.6 per cent change from 2017.

In Western Australia, there were 70,925 government-funded students at TAFE and other government providers in 2018, which is a -0.9 per cent change from 2017. There were 545 government-funded students at Community education providers in 2018, which is a -1.8 per cent change from 2017. There were 26,835 government-funded students at Other providers in 2018, which is a -9.6 per cent change from 2017. There were 3,995 government-funded students attending more than one provider type in 2018, which is a -5.9 per cent change from 2017. In total there were 102,300 students in government-funded training in Western Australia in 2018, which is a -3.6 per cent change from 2017.

In Tasmania, there were 13,870 government-funded students at TAFE and other government providers in 2018, which is a 2.7 per cent change from 2017. There were 0 government-funded students at Community education providers in 2018, which is a 0 per cent change from 2017. There were 10,205 government-funded students at Other providers in 2018, which is a -9.5 per cent change from 2017. There were 1,605 government-funded students attending more than one provider type in 2018, which is a 4.2 per cent change from 2017. In total there were 25,675 students in government-funded training in Tasmania in 2018, which is a -2.5 per cent change from 2017.

In Northern Territory, there were 8,755 government-funded students at TAFE and other government providers in 2018, which is a -11.1 per cent change from 2017. There were 0 government-funded students at Community education providers in 2018, which is a 0 per cent change from 2017. There were 7,085 government-funded students at Other providers in 2018, which is a -15.7 per cent change from 2017. There were 1,960 government-funded students attending more than one provider type in 2018, which is a -2.2 per cent change from 2017. In total there were 17,800 students in government-funded training in Northern Territory in 2018, which is a -12.1 per cent change from 2017.

In the Australian Capital Territory, there were 11,460 government-funded students at TAFE and other government providers in 2018, which is a 6.1 per cent change from 2017. There were 0 government-funded students at Community education providers in 2018, which is a 0 per cent change from 2017. There were 5,610 government-funded students at Other providers in 2018, which is a 9 per cent change from 2017. There were 680 government-funded students attending more than one provider type in 2018, which is a 7.1 per cent change from 2017. In total there were 17,745 students in government-funded training in the Australian Capital Territory in 2018, which is a 7 per cent change from 2017.

In Australia, there were 575,840 government-funded students at TAFE and other government providers in 2018, which is a 0.9 per cent change from 2017. There were 58,070 government-funded students at Community education providers in 2018, which is a 2.8 per cent change from 2017. There were 406,695 government-funded students at Other providers in 2018, which is a -5.3 per cent change from 2017. There were 72,765 government-funded students attending more than one provider type in 2018, which is a -7.5 per cent change from 2017. In total there were 1,113,370 students in government-funded training in Australia in 2018, which is a -1.9 per cent change from 2017.

The source for this table is NCVER 2018, Australian vocational education and training statistics: Government-funded students and courses 2018 (Data Slicer), NCVER, Adelaide.

Note that data for 2017 differs from that reported in the Victorian Training Market Snapshot 2017, due to revisions made to the NCVER time series to de-duplicate student numbers from 2015 onwards.

## HIGHER QUALITY VET SYSTEM

Skills First aims to ensure that every Victorian has access to high-quality training that students and employers can trust. The new training market settings shift focus from high-volume toward high-quality training that leads to jobs and strong economic outcomes.

In 2018, there were 202,334 new course enrolments (i.e. commencements) and 112,496 continuing enrolments (i.e. students continuing their course from previous years).

Although TAFE Network government-funded enrolments decreased in 2018, the decline was lower than the decrease in overall market activity. As a result, TAFE Network market share continues to strengthen, growing to 44.2 per cent in 2018 (up 3.3 percentage points).

Results from the Department’s Student and Employer Satisfaction Surveys point to general stability in the training quality of the government-subsidised training system. Around three in four students were satisfied with their VET training and achieved their main reason for training. The improved employment status measure remained steady for students who were unemployed before training, whilst declining slightly for those who were employed before training.

### Table 3. Numbers of students, enrolments, commencements and providers by provider type for the Victorian training system

In 2016, the number of students in government-funded courses at TAFE was 90,226, in 2017 was 95,808 and in 2018 was 93,211. There was a 3 per cent decrease between 2017 and 2018.

In 2016, the number of students in government-funded courses at dual sector providers was 28,255, in 2017 was 30,099 and in 2018 was 31,518. There was a 5 per cent increase between 2017 and 2018.

In 2016, the number of students in government-funded courses at ACE providers was 44,681, in 2017 was 46,624 and in 2018 was 48,283. There was a 4 per cent increase between 2017 and 2018.

In 2016, the number of students in government-funded courses at private providers was 157,928, in 2017 was 119,739 and in 2018 was 92,962. There was a 22 per cent decrease between 2017 and 2018.

In 2016, the total number of students in government-funded courses in Victoria was 321,090, in 2017 was 292,270 and in 2018 was 265,974. There was a 9 per cent decrease between 2017 and 2018.

In 2016, the number of government-funded enrolments at TAFE was 104,013, in 2017 was 109,005 and in 2018 was 104,533. There was a 4 per cent decrease between 2017 and 2018.

In 2016, the number of government-funded enrolments at dual sector providers was 30,897, in 2017 was 32,637 and in 2018 was 34,644. There was a 6 per cent increase between 2017 and 2018.

In 2016, the number of government-funded enrolments at ACE providers was 64,728, in 2017 was 70,544 and in 2018 was 74,310. There was a 5 per cent increase between 2017 and 2018.

In 2016, the number of government-funded enrolments at private providers was 183,768, in 2017 was 134,217 and in 2018 was 101,343. There was a 24 per cent decrease between 2017 and 2018.

In 2016, the total number of government-funded enrolments in Victoria was 383,406, in 2017 was 346,403 and in 2018 was 314,830. There was a 9 per cent decrease between 2017 and 2018.

In 2016, the number of government-funded commencements at TAFE was 67,392, in 2017 was 67,991 and in 2018 was 62,373. There was an 8 per cent decrease between 2017 and 2018.

In 2016, the number of government-funded commencements at dual sector providers was 20,398, in 2017 was 21,522 and in 2018 was 22,818. There was a 6 per cent increase between 2017 and 2018.

In 2016, the number of government-funded commencements at ACE providers was 58,272, in 2017 was 64,675 and in 2018 was 66,828. There was a 3 per cent increase between 2017 and 2018.

In 2016, the number of government-funded commencements at private providers was 101,894, in 2017 was 67,396 and in 2018 was 50,315. There was a 25 per cent decrease between 2017 and 2018.

In 2016, the total number of government-funded commencements in Victoria was 247,956, in 2017 was 221,584 and in 2018 was 202,334. There was a 9 per cent decrease between 2017 and 2018.

In 2016, the number of TAFE providers was 12, in 2017 was 12 and in 2018 was 12. There was no change between 2017 and 2018.

In 2016, the number of dual sector providers was 4, in 2017 was 4 and in 2018 was 4. There was no change between 2017 and 2018.

In 2016, the number of ACE providers was 266, in 2017 was 259 and in 2018 was 258. There was a 0.4 per cent decrease between 2017 and 2018.

In 2016, the number of private providers was 354, in 2017 was 322 and in 2018 was 268. There was a 17 per cent decrease between 2017 and 2018.

In 2016, the total number of providers delivering government-funded training in Victoria was 636, in 2017 was 597 and in 2018 was 542. There was a 9 per cent decrease between 2017 and 2018.

The source for this table is DET training market data.

### Chart 2. Proportion of government-funded students by provider type

In 2016, 37 per cent of government-funded students were at the TAFE Network, 14 per cent of government-funded students were at ACE providers and 49 per cent of government-funded students were at private providers.

In 2017, 43 per cent of government-funded students were at the TAFE Network, 16 per cent of government-funded students were at ACE providers and 41 per cent of government-funded students were at private providers.

In 2018, 47 per cent of government-funded students were at the TAFE Network, 18 per cent of government-funded students were at ACE providers and 35 per cent of government-funded students were at private providers.

The source for this chart is DET training market data.

### Chart 3. Market share of course enrolments by provider type

In 2016, the TAFE Network delivered 35 per cent of government-funded enrolments, ACE providers delivered 17 per cent of government-funded enrolments and private providers delivered 48 per cent of government-funded enrolments.

In 2017, the TAFE Network delivered 41 per cent of government-funded enrolments, ACE providers delivered 20 per cent of government-funded enrolments and private providers delivered 39 per cent of government-funded enrolments.

In 2018, the TAFE Network delivered 44 per cent of government-funded enrolments, ACE providers delivered 24 per cent of government-funded enrolments and private providers delivered 32 per cent of government-funded enrolments.

The source for this chart is DET training market data.

### Table 4. Selected results from the Department’s Student Satisfaction Survey and Employer Satisfaction Survey

In 2016, the Proportion of VET students who achieved their main reason for training was 72.7 per cent, in 2017 was 73.2 per cent and in 2018 was 73.5 per cent. The percentage point change between 2017 and 2018 was 0.3.

In 2016, the Proportion of VET students with an improved employment status after training was 42.4 per cent, in 2017 was 46.2 per cent and in 2018 was 45.2 per cent. The percentage point change between 2017 and 2018 was -1.0.

In 2016, the Proportion of VET students who were satisfied with training provided by their RTO was 76.5 per cent, in 2017 was 77 per cent and in 2018 was 77.5 per cent. The percentage point change between 2017 and 2018 was 0.5.

In 2016, the Proportion of employers of apprentices and trainees who were satisfied with training provided by their RTO was 76.8 per cent, in 2017 was 77.6 per cent and in 2018 was 78.5 per cent. The percentage point change between 2017 and 2018 was 0.9.

The source for this table is DET Student and Employer Satisfaction Surveys. Year represents the year students left training.

Note that the methodology used to construct the Proportion of VET students with an improved employment status after training measure was changed for the 2017 training year, therefore the results for the 2016 and 2017 training years presented in Table 4 are not comparable.

## TRAINING FOR REAL JOBS

The Victorian TAFE and training system aims to develop skills that lead to real jobs, and prioritises funding to courses that align to industry needs and workforce demands, have strong job outcomes and are linked to government priorities that are of the greatest value to the Victorian economy. These include the National Disability Insurance Scheme (NDIS), Family Violence and Infrastructure workforces, and Apprenticeships and High Value Traineeships.

Overall government-funded enrolments in priority areas are growing, particularly in courses related to NDIS, Family Violence and Apprenticeships; and TAFE Network providers have expanded their delivery across each of these key priority areas, even as the overall training market moves to a smaller and more stable system.

The TAFE Network continues to lead in traineeships growth, with enrolments increasing by 5.8 per cent from 2017 to 2018. Overall traineeship enrolments have declined by 5 per cent, driven by a decrease of 10 per cent at private providers.

Growth in the five industries with the largest volumes of apprenticeship enrolments has slowed compared to 2017, broadly reflecting the moderating of overall growth in apprenticeships.

The five industries with the largest volumes of government-funded enrolments make up 49 per cent of total enrolments, with Health Care and Social Assistance and Construction continuing to make up the largest share.

### Table 5. Enrolments in Government priority areas by provider type

In courses supporting the NDIS, there were 7,241 government-funded enrolments in 2016 at TAFEs, 9,011 enrolments in 2017 and 10,540 enrolments in 2018. Between 2017 and 2018 there was a 17 per cent increase.

In courses supporting the NDIS, there were 2,145 government-funded enrolments in 2016 at dual sector providers, 2,515 enrolments in 2017 and 2,887 enrolments in 2018. Between 2017 and 2018 there was a 15 per cent increase.

In courses supporting the NDIS, there were 4,290 government-funded enrolments in 2016 at ACE providers, 3,850 enrolments in 2017 and 5,048 enrolments in 2018. Between 2017 and 2018 there was a 31 per cent increase.

In courses supporting the NDIS, there were 18,307 government-funded enrolments in 2016 at private providers, 13,005 enrolments in 2017 and 13,003 enrolments in 2018. Between 2017 and 2018 there was no change.

In courses supporting the NDIS, there were 31,983 government-funded enrolments in total in 2016, 28,381 enrolments in 2017 and 31,478 enrolments in 2018. Between 2017 and 2018 there was an 11 per cent increase.

In courses supporting family violence prevention, there were 4,379 government-funded enrolments in 2016 at TAFEs, 5,701 enrolments in 2017 and 6,681 enrolments in 2018. Between 2017 and 2018 there was a 17 per cent increase.

In courses supporting family violence prevention, there were 1,783 government-funded enrolments in 2016 at dual sector providers, 1,928 enrolments in 2017 and 2,284 enrolments in 2018. Between 2017 and 2018 there was an 18 per cent increase.

In courses supporting family violence prevention, there were 1,780 government-funded enrolments in 2016 at ACE providers, 1,757 enrolments in 2017 and 2,154 enrolments in 2018. Between 2017 and 2018 there was a 23 per cent increase.

In courses supporting family violence prevention, there were 5,044 government-funded enrolments in 2016 at private providers, 4,251 enrolments in 2017 and 4,517 enrolments in 2018. Between 2017 and 2018 there was a 6 per cent increase.

In courses supporting family violence prevention, there were 12,986 government-funded enrolments in total in 2016, 13,637 enrolments in 2017 and 15,636 enrolments in 2018. Between 2017 and 2018 there was a 15 per cent increase.

In courses supporting the infrastructure workforce, there were 22,279 government-funded enrolments in 2016 at TAFEs, 22,414 enrolments in 2017 and 22,944 enrolments in 2018. Between 2017 and 2018 there was a 2 per cent increase.

In courses supporting the infrastructure workforce, there were 7,848 government-funded enrolments in 2016 at dual sector providers, 8,384 enrolments in 2017 and 8,956 enrolments in 2018. Between 2017 and 2018 there was a 7 per cent increase.

In courses supporting the infrastructure workforce, there were 0 government-funded enrolments at ACE providers in 2016, 2017 and 2018.

In courses supporting the infrastructure workforce, there were 23,313 enrolments in 2016 at private providers, 18,331 enrolments in 2017 and 16,803 enrolments in 2018. Between 2017 and 2018 there was an 8 per cent decrease.

In courses supporting the infrastructure workforce, there were 53,440 government-funded enrolments in total in 2016, 49,129 enrolments in 2017 and 48,703 enrolments in 2018. Between 2017 and 2018 there was a 1 per cent decrease.

In high-value traineeships there were 1,105 government-funded enrolments in 2016 at TAFEs, 1,668 enrolments in 2017 and 1,952 enrolments in 2018. Between 2017 and 2018 there was a 17 per cent increase.

In high-value traineeships there were 19 government-funded enrolments in 2016 at dual sector providers, 27 enrolments in 2017 and 82 enrolments in 2018. Between 2017 and 2018 there was a 204 per cent increase.

In high-value traineeships there were 563 government-funded enrolments in 2016 at ACE providers, 557 enrolments in 2017 and 671 enrolments in 2018. Between 2017 and 2018 there was a 20 per cent increase.

In high-value traineeships there were 5,560 government-funded enrolments in 2016 at private providers, 4,958 enrolments in 2017 and 4,453 enrolments in 2018. Between 2017 and 2018 there was a 10 per cent decrease.

In high-value traineeships there were there were 7,247 government-funded enrolments in total in 2016, 7,210 enrolments in 2017 and 7,158 enrolments in 2018. Between 2017 and 2018 there was a 1 per cent decrease.

In apprenticeships there were 24,032 government-funded enrolments in 2016 at TAFEs, 26,767 enrolments in 2017 and 28,903 enrolments in 2018. Between 2017 and 2018 there was an 8 per cent increase.

In apprenticeships there were 6,562 government-funded enrolments in 2016 at dual sector providers, 6,955 enrolments in 2017 and 7,485 enrolments in 2018. Between 2017 and 2018 there was an 8 per cent increase.

In apprenticeships there were 81 government-funded enrolments in 2016 at ACE providers, 98 enrolments in 2017 and 158 enrolments in 2018. Between 2017 and 2018 there was a 61 per cent increase.

In apprenticeships there were 12,144 government-funded enrolments in 2016 at private providers, 12,382 enrolments in 2017 and 11,660 enrolments in 2018. Between 2017 and 2018 there was a 6 per cent decrease.

In apprenticeships there were 42,819 government-funded enrolments in total in 2016, 46,202 enrolments in 2017 and 48,206 enrolments in 2018. Between 2017 and 2018 there was a 4 per cent increase.

There were a total of 43,517 government-funded enrolments in at least one Government priority area in 2016 at TAFEs, 47,068 enrolments in 2017 and 49,546 enrolments in 2018. Between 2017 and 2018 there was a 5 per cent increase.

There were a total of 12,923 government-funded enrolments in at least one Government priority area in 2016 at dual sector providers, 13,735 enrolments in 2017 and 14,736 enrolments in 2018. Between 2017 and 2018 there was a 7 per cent increase.

There were a total of 5,224 government-funded enrolments in at least one Government priority area in 2016 at ACE providers, 4,906 enrolments in 2017 and 6,493 enrolments in 2018. Between 2017 and 2018 there was a 32 per cent increase.

There were a total of 53,100 government-funded enrolments in at least one Government priority area in 2016 at private providers, 41,523 enrolments in 2017 and 39,135 enrolments in 2018. Between 2017 and 2018 there was a 6 per cent decrease.

There were a total of 114,764 government-funded enrolments in at least one Government priority area in total in 2016, 107,232 enrolments in 2017 and 109,910 enrolments in 2018. Between 2017 and 2018 there was a 2 per cent increase.

The source of this table is DET training market data. The priority areas are not mutually exclusive. NDIS, Family Violence and High-Value Traineeship courses are defined in the 2018 Funded Courses List, and Infrastructure courses in the Jobs and Training Needs Reports. Equivalent superseded courses are also included.

### Table 6. Top 5 industries for apprentice enrolments

There were 24,598 apprenticeship enrolments in the Construction industry in 2016, 27,222 enrolments in 2017 and 29,562 enrolments in 2018. There was a 9 per cent increase between 2017 and 2018.

There were 7,273 apprenticeship enrolments in Other Services industry in 2016, 8,011 enrolments in 2017 and 8,048 enrolments in 2018. There was a 0.5 per cent increase between 2017 and 2018.

There were 4,215 apprenticeship enrolments in the Manufacturing industry in 2016, 4,252 enrolments in 2017 and 4,289 enrolments in 2018. There was a 1 per cent increase between 2017 and 2018.

There were 3,056 apprenticeship enrolments in the Accommodation and Food Services industry in 2016, 2,918 enrolments in 2017 and 2,652 enrolments in 2018. There was a 9 per cent decrease between 2017 and 2018.

There were 1,752 apprenticeship enrolments in the Retail Trade industry in 2016, 1,960 enrolments in 2017 and 1,900 enrolments in 2018. There was a 3 per cent decrease between 2017 and 2018.

The source of this table is DET training market data.

### Table 7. Traineeship enrolments by provider type

There were 4,312 traineeship enrolments at TAFEs in 2016, 5,366 enrolments in 2017 and 5,663 enrolments in 2018. There was a 5.5 per cent increase between 2017 and 2018.

There were 433 traineeship enrolments at dual sector providers in 2016, 424 enrolments in 2017 and 462 enrolments in 2018. There was a 9 per cent increase between 2017 and 2018.

There were 1,242 traineeship enrolments at ACE providers in 2016, 1,276 enrolments in 2017 and 1,279 enrolments in 2018. There was a 0.2 per cent increase between 2017 and 2018.

There were 16,511 traineeship enrolments at private providers in 2016, 12,843 enrolments in 2017 and 11,496 enrolments in 2018. There was a 10.5 per cent decrease between 2017 and 2018.

There were a total of 22,498 traineeship enrolments in 2016, 19,909 enrolments in 2017 and 18,900 enrolments in 2018. There was a 5.1 per cent decrease between 2017 and 2018.

The source of this table is DET training market data.

### Table 8. Enrolments by broad industry area – top 5

There were 76,787 enrolments in Health Care and Social Assistance in 2016, 68,016 enrolments in 2017 and 62,565 enrolments in 2018. Health Care and Social Assistance comprised 20 per cent of overall government-funded enrolments in 2018, and the 2016 VET employment share was 14 per cent.

There were 57,247 enrolments in Construction in 2016, 52,738 enrolments in 2017 and 50,760 enrolments in 2018. Construction comprised 16 per cent of overall government-funded enrolments in 2018, and the 2016 VET employment share was 15 per cent.

There were 19,725 enrolments in Other Services in 2016, 17,524 enrolments in 2017 and 15,523 enrolments in 2018. Other Services comprised 5 per cent of overall government-funded enrolments in 2018, and the 2016 VET employment share was 6 per cent.

There were 21,273 enrolments in Manufacturing in 2016, 16,478 enrolments in 2017 and 13,113 enrolments in 2018. Manufacturing comprised 4 per cent of overall government-funded enrolments in 2018, and the 2016 VET employment share was 9 per cent.

There were 13,723 enrolments in Professional, Scientific and Technical Services in 2016, 12,437 enrolments in 2017 and 12,094 enrolments in 2018. Professional, Scientific and Technical Services comprised 4 per cent of overall government-funded enrolments in 2018, and the 2016 VET employment share was 5 per cent.

The source of this table is DET training market data and ABS Census data. Training data includes Certificate II and above qualifications only, and excludes qualifications that are not aligned to industry. ABS Census data includes people with a highest prior qualification at the Certificate, Diploma or Advanced Diploma level.

Note that the Other Services industry includes a broad range of personal services; religious, civic, professional and other interest group services; selected repair and maintenance activities; and private households employing staff.

## EQUITABLE ACCESS

Skills First aims to create an inclusive training system that ensures all Victorians have access to high quality training that leads to strong job outcomes, regardless of age, background, circumstance or postcode.

In the context of the smaller, more stable government-funded training market, representation of key cohorts remains strong. For example, Table 9 shows that 13 per cent of government-funded enrolments in Victoria are from students with a disability, and 25 per cent of enrolments are from students who are unemployed.

The TAFE Network plays an important part in helping our most disadvantaged and/or disengaged students to access and stay connected with training. Table 9 also shows that the TAFE Network accounted for 30 per cent of enrolments from students with a disability and 47 per cent of enrolments from Indigenous people in 2018.

The Adult and Community Education (ACE) sector continues to lead in providing training to learners facing barriers to engagement in education, training and employment. ACE providers primarily deliver pre-accredited and foundation training across Victoria and in 2018 delivered almost 39 per cent of all foundation training enrolments.

### Table 9. Key cohorts, 2018

In 2018, there were 39,387 government-funded enrolments by people with a disability, which was 13 per cent of total government-funded enrolments. 30 per cent of these enrolments were at TAFE Network providers.

In 2018, there were 5,907 government-funded enrolments by Indigenous people, which was 2 per cent of total government-funded enrolments. 47 per cent of these enrolments were at TAFE Network providers.

In 2018, there were 158,930 government-funded enrolments by people with no prior Certificate III and aged 20 to 64, which was 50 per cent of total government-funded enrolments. 41 per cent of these enrolments were at TAFE Network providers.

In 2018, there were 22,218 government-funded enrolments by early school leavers aged 15 to 19, which was 7 per cent of total government-funded enrolments. 68 per cent of these enrolments were at TAFE Network providers.

In 2018, there were 78,553 government-funded enrolments by unemployed people, which was 25 per cent of total government-funded enrolments. 29 per cent of these enrolments were at TAFE Network providers.

In 2018, there were 108,765 government-funded enrolments by Culturally and Linguistically Diverse people, which was 35 per cent of total government-funded enrolments. 31 per cent of these enrolments were at TAFE Network providers.

The source of this table is DET training market data. The cohorts are not mutually exclusive. Students may be represented in more than one key cohort (for example, students may have no prior Certificate III and have a disability). Culturally and Linguistically Diverse people speak a language other than English at home, or have a non-English speaking country of birth.

### Table 10. Foundation enrolments by provider type

Government-funded enrolments in Foundation courses at TAFEs were 9,508 in 2016, 10,768 in 2017 and 9,646 in 2018.

Government-funded enrolments in Foundation courses at dual sector providers were 2,609 in 2016, 3,015 in 2017 and 3,352 in 2018.

Government-funded enrolments in Foundation courses at ACE providers were 11,210 in 2016, 11,733 in 2017 and 10,148 in 2018.

Government-funded enrolments in Foundation courses at private providers were 7,842 in 2016, 4,882 in 2017 and 3,078 in 2018.

Overall government-funded enrolments in Foundation courses were 31,169 in 2016, 30,398 in 2017 and 26,224 in 2018.

The source of this table is DET training market data.

## NOTES ON THE DATA

### Data source

The main source of VET data in this report is DET’s training activity database referred to as the Skills Victoria Training System (SVTS). This administrative data is reported to DET by government funded training providers.

SVTS data included in this report may differ to previous publications as classifications are updated from time to time to improve data quality and consistency across years. In addition, changes to reporting and data standards may lead to minor revisions to data previously reported.

SVTS data presented in this report is not comparable to other publicly available data such as:

* National Centre for Vocational Education Research (NCVER) data – the information reported by NCVER is sourced from data submitted by all states and territories. While the NCVER data for Victoria is sourced from data submitted by the Victorian Department of Education and Training, due to statistical and counting rules there will be marginal differences between Departmental data and NCVER data.
* Budget Paper No. 3 (Chapter 2 - Department performance statements) because of differences in counting rules and definitions.

The main measures used in this report are students, course enrolments and course commencements. Course commencements show the number of new course enrolments in a given year, as courses often take more than one year to complete. Course enrolments include both new commencements and continuing enrolments. A student may be enrolled in more than one course at a training provider during a given reporting period.

The report also draws on publicly available data on the VET system from NCVER (which allows for inter jurisdictional comparisons) and data from the Australian Bureau of Statistics.

### Data scope

This report covers government-funded training activity only. Training activity for the full year 2018 is compared with the same period in 2016 and 2017 to provide a picture of changes and trends over time. Note that duplication of the NCVER student data has been removed from 2015 onwards, impacting on the comparability of data to that reported in the Training Market Snapshot 2017.

### Learn Local and Adult and Community Education (ACE)

The Training Market Report generally classifies providers as TAFE, Dual Sector, Adult and Community Education (ACE) or private. However, some data sources use a slightly different definition – Learn Local – rather than ACE. Only Learn Local organisations report activity through to the Adult, Community and Further Education Board, while ACE organisations are self-identified and are not required to do so. Some Learn Local organisations self-identify as private RTOs and are therefore not included in the ACE definition.

### Industry classifications

All industry titles and classifications included in this Report are defined as per the Australian and New Zealand Standard Industrial Classifications (ANZSIC). For more information, see: www.abs.gov.au/ANZSIC.

Where a qualification is considered relevant across several industries, enrolments have been proportionally allocated across relevant ANZSIC industries using employment data as a guide.

### Foundation courses

Foundation courses are identified as set out in the Guidelines about Determining Student Eligibility and Supporting Evidence for the relevant reporting period (the 2019 Guidelines are available at https://www.education.vic.gov.au/Documents/training/providers/rto/2019\_FINAL\_Eligibility\_v1.pdf).

### Regional analysis

Data on regional training is reported by the region in which the training was delivered (as distinct from the region where the student lives). Note a course can be delivered to a student across multiple regions. In these cases the course enrolment will be counted in each region in which it was delivered. Consequently, for tables that present data by delivery region, totals may not match the sum of their components.