



High-use training package qualifications: specialised providers



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INTRODUCTION

This report investigates specialised providers operating in the Australian vocational education and training (VET) system in 2016. Specialised providers are defined here as providers who had more than 50% of their total program enrolments within a single qualification in 2016.

Of the 20 training package qualifications with the most enrolments in 2016, the Diploma of Early Childhood Education and Care had the highest percentage of specialised providers (23%). Specialised providers made up at least 10% of providers delivering the Certificate III in Civil Construction Plant Operations, the Certificate IV in Training and Assessment, the Certificate III in Early Childhood Education and Care, the Certificate IV in Building and Construction (Building), the Diploma of Nursing and the Certificate III in Electrotechnology Electrician.

This report examines two qualifications with high proportions of specialised providers: the Diploma of Early Childhood Education and Care and the Certificate IV in Training and Assessment. It compares the characteristics of these providers with non-specialised providers who also deliver these qualifications. The characteristics examined include enrolments, student demographics, funding sources and delivery types.

HIGHLIGHTS

- Since 2014, program enrolments in the Diploma of Early Childhood Education and Care at specialised providers have increased. The share of total enrolments in this diploma at specialised providers has also more than tripled. This increase in enrolments appears to have largely been driven by the availability of VET FEE-HELP student loans.
- For providers specialising in the Certificate IV in Training and Assessment, total program enrolments and enrolments in the certificate IV have fallen since 2014. However, the enrolment share of the certificate IV at specialised providers has increased.
- The potential difficulties faced by providers when changes are made to the qualifications in which they specialise are demonstrated by the updating of the Certificate IV in Training and Assessment and the policy changes (such as changes to the VET FEE-HELP scheme) affecting the Diploma of Early Childhood Education and Care.

DIPLOMA OF EARLY CHILDHOOD EDUCATION AND CARE

As shown in table 1, the average number of enrolments in the Diploma of Early Childhood Education and Care were roughly similar at both specialised and non-specialised providers. Non-specialised providers were larger overall than specialised providers, which is to be expected considering that the non-specialised group includes providers such as TAFE (technical and further education) institutes. Thirteen providers only had program enrolments in the Diploma of Early Childhood Education and Care, and a further seven had more than 90% of their program enrolments in that qualification (not shown).

Table 1 Number of providers of the Diploma of Early Childhood Education and Care and their average enrolments, 2016

	Specialised providers	Non-specialised providers
Number of providers	79	268
Average number of program enrolments in the diploma	234	210
Average number of program enrolments in total	332	6041

Source: NCVER (2017a, 2017b).

Most common qualifications

The Diploma of Early Childhood Education and Care was the most common qualification studied at both specialised (18 503 enrolments or 71% of total) and non-specialised providers (56 493 or 3% of total). The related Certificate III in Early Childhood Education and Care was the second most common qualification, with 3938 enrolments at specialised providers (15% of total) and 47 395 enrolments at non-specialised providers (3% of total).

The Diploma and Certificate III in Early Childhood Education and Care represented 86% of total program enrolments at specialised providers (22 441 enrolments). By contrast, the same two qualifications only represented 6% of total program enrolments at non-specialised providers (103 888 enrolments).



Table 2 Ten most common training package qualifications for providers of the Diploma of Early Childhood Education and Care, 2016

Specialised providers			Non-specialised providers		
Training package qualification	Program enrolments		Training package qualification	Program enrolments	
	N	%		N	%
CHC50113 - Diploma of Early Childhood Education and Care	18 503	71	CHC50113 - Diploma of Early Childhood Education and Care	56 493	3
CHC30113 - Certificate III in Early Childhood Education and Care	3 938	15	CHC30113 - Certificate III in Early Childhood Education and Care	47 395	3
CPP30411 - Certificate III in Security Operations	471	2	HLT51612 - Diploma of Nursing (Enrolled-Division 2 nursing)	22 533	1
CPP20212 - Certificate II in Security Operations	405	2	UEE30811 - Certificate III in Electrotechnology Electrician	21 292	1
FSK10213 - Certificate I in Skills for Vocational Pathways	216	1	CHC33015 - Certificate III in Individual Support	18 770	1
CHC52015 - Diploma of Community Services	165	1	TAE40110 - Certificate IV in Training and Assessment	17 025	1
SIT30813 - Certificate III in Commercial Cookery	157	1	CHC30213 - Certificate III in Education Support	15 426	1
BSB51915 - Diploma of Leadership and Management	127	<1	CPC30211 - Certificate III in Carpentry	14 302	1
CHC50213 - Diploma of School Age Education and Care	115	<1	BSB50215 - Diploma of Business	12 427	1
CHC51308 - Diploma of Education Support	105	<1	CPC32413 - Certificate III in Plumbing	12 033	1
Total number of program enrolments	26 211		Total number of program enrolments	1 619 022	

Source: NCVER (2017a, 2017b).

Trends in enrolment

This section analyses the enrolment trends from 2014 to 2016 for providers who were identified as specialised providers of the Diploma of Early Childhood Education and Care in 2016.

Total program enrolments at these specialised providers increased by 39% between 2014 and 2016 (from 18 892 to 26 211) compared with an increase of 22% for non-specialised providers (from 1 323 462 to 1 619 022). The group of non-specialised providers includes established providers such as TAFE institutes. By contrast, specialised providers tend to include providers who have recently entered the market. After an initial phase of growth, the increase in enrolments at specialised providers may slow down.

Enrolments in childcare qualifications have substantially increased since the introduction of the National Quality Framework for children's education and care.

Specialised providers increased their enrolments in the Diploma of Early Childhood Education and Care by 414% between 2014 and 2016, and had 25% of the total enrolments in this diploma in 2016.

Growth in program enrolments between 2014 and 2016 at specialised providers was concentrated in the Diploma of Early Childhood Education and Care rather than in the related Certificate III in Early Childhood Education and Care. Enrolments in the certificate III grew by 59% at specialised providers (from 2472 to 3938) compared with 414% for the diploma (from 3597 to 18 503). By comparison, at non-specialised providers, enrolments in the certificate III grew by 81% (from 26 199 to 47 395) and enrolments in the diploma grew by 106% (from 27 446 to 59 493).

The enrolment trends in childcare qualifications are further examined in *High-use training package qualifications: childcare* (Korbel 2017). Enrolments in childcare qualifications have substantially increased since the introduction of the National Quality Framework for children’s education and care in 2012 (Australian Children’s Education and Care Quality Authority 2017). Since 2014, enrolments in the Diploma of Early Childhood Education and Care have exceeded those in the Certificate III in Early Childhood Education and Care due to the availability of VET FEE-HELP loans for the diploma and the scaling-down of state-based training entitlement schemes.

The share of enrolments in early childhood education and care qualifications greatly increased among specialised providers between 2014 and 2016. The combined enrolment share for both qualifications at specialised providers increased from 32% in 2014 to 86% in 2016.

The share of the Diploma of Early Childhood Education and Care enrolments at specialised providers increased from 19% in 2014 to 71% in 2016 (while the share of Certificate III in Early Childhood Education and Care enrolments increased from 13% to 15%). By comparison, the share of enrolments in the diploma at non-specialised providers increased from 2% to 3%.

Table 3 Program enrolments in early childhood education and care qualifications at providers delivering the Diploma of Early Childhood Education and Care, 2014–16

		Specialised providers			Non-specialised providers		
		2014	2015	2016	2014	2015	2016
CHC30113 - Certificate III in Early Childhood Education and Care	N	2472	4400	3938	26 199	43 048	47 395
	%	13	19	15	2	3	3
CHC50113 - Diploma of Early Childhood Education and Care	N	3597	13 111	18 503	27 446	51 388	56 493
	%	19	57	71	2	4	3
Total program enrolments across all qualifications		18 892	22 886	26 211	1 323 462	1 340 501	1 619 022

Source: NCVET (2017a, 2017b).

Student demographics

A higher proportion of students undertaking the Diploma of Early Childhood Education and Care at specialised providers resided in major cities compared with students studying the diploma at non-specialised providers (87% compared with 68%). This may indicate that more specialised providers cannot find a large enough market in which to operate in less densely populated areas, while non-specialised providers (such as TAFE institutes) offer a wide enough range of training in the same areas, making delivery more viable.

Table 4 Program enrolments in the Diploma of Early Childhood Education and Care by student remoteness region (2011 ARIA+), 2016

		Major cities	Inner regional	Outer regional	Remote	Very remote	Outside Australia	Not known	Total number of enrolments
Specialised	N	16 149	1658	533	50	23	7	83	18 503
	%	87	9	3	<1	<1	<1	<1	
Non-specialised	N	38 141	10 216	4346	709	398	2408	275	56 493
	%	68	18	8	1	1	4	<1	

ARIA = Accessibility/Remoteness Index of Australia.
Source: NCVER (2017a, 2017b).

A higher proportion of enrolments at specialised providers were by students from the most disadvantaged quintile (39%) compared with non-specialised providers (25%). Research undertaken by Myconos et al. (2016) investigated the role of private training providers delivering training to young early school leavers (many of whom would be most disadvantaged) offers some additional insights into why this may be the case.

Table 5 Enrolments in the Diploma of Early Childhood Education and Care by student socio-economic status (SEIFA IRSD 2011), 2016

		Quintile 1: Most disadvantaged	Quintile 2	Quintile 3	Quintile 4	Quintile 5: Least disadvantaged	Not known	Total number of enrolments
Specialised	N	7144	3525	3158	3181	1383	112	18 503
	%	39	19	17	17	7	1	
Non-specialised	N	13 869	11 394	10 920	10 825	6755	2730	56 493
	%	25	20	19	19	12	5	

Note: Socio-economic status is calculated based on students' residential address.
SEIFA = Socio-Economic Indexes for Australia; IRSD = Index of Relative Socio-economic Disadvantage.
Source: NCVER (2017a, 2017b).

Smaller specialised providers may be better suited to providing assistance to disadvantaged students.

Myconos et al. (2016) found that small private training providers saw their small scale as something that appealed to school leavers who had previously struggled in larger institutions. These providers perceived their strengths to be their provision of mentoring and support staff and literacy and numeracy programs, as well as their access to strong employer and industry connections. However, the report also noted that these providers' physical and organisational infrastructure and economies of scale were potentially limited compared with other providers such as TAFE institutes.

Smaller specialised providers may be occupying an important niche in the training sector and may be better suited to providing assistance to these disadvantaged students.

Funding and delivery

Specialised providers delivered a higher percentage of delivery hours as fee-for-service training compared with non-specialised providers (34% of hours compared with 28%). This could indicate that specialised providers are more active in marketing their courses or they have less opportunity to access government funding than the non-specialised providers.

Table 6 Hours of delivery by funding source for subjects enrolled in as part of the Diploma of Early Childhood Education and Care, 2016

	Specialised		Non-specialised	
	N	%	N	%
Commonwealth and state funding	11 055 516	66	44 658 960	72
Domestic fee-for-service	5 703 895	34	14 205 262	23
International fee-for-service	736	<1	2 819 843	5
Total number of hours	16 760 147		61 684 065	

Source: NCVET (2017a, 2017b).

Compared with non-specialised providers, specialised providers delivered more classroom-based training as a percentage of the total hours delivered (66% of hours compared with 47%) and undertook more recognition of prior learning (RPL; 12% of hours compared with 8%). This may indicate that the smaller specialised providers lack the resources, infrastructure or staff to conduct electronic or employment-based training, or, alternatively, that they made a deliberate choice to focus on classroom-based teaching.

Table 7 Hours of delivery by delivery type for subjects enrolled in as part of the Diploma of Early Childhood Education and Care, 2016

	Specialised		Non-specialised	
	N	%	N	%
Classroom	11 110 226	66	28 952 065	47
Electronic	1 182 602	7	7 054 646	11
Employment	1 833 443	11	10 641 793	17
Other	607 799	4	9 845 138	16
Not applicable – recognition of prior learning	2 026 077	12	5 190 423	8
Total number of hours	16 760 147		61 684 065	

Source: NCVET (2017a, 2017b).

Summary

In 2016, specialised providers accounted for 25% of the 74 996 program enrolments in the Diploma of Early Childhood Education and Care. These providers are serving a significant portion of the market for this qualification and, in turn, this qualification represents a significant portion of their business. These specialised providers may be highly sensitive or vulnerable to fluctuations in the market and the funding of particular qualifications.

Specialised providers have increased their enrolments in the diploma significantly, which may be related to the availability of VET FEE-HELP student loans and other policy initiatives. While the diploma is currently on the approved list for VET Student Loans (VSL) (Australian Government 2017), and some specialised providers are approved as VSL providers, this may change going forward. This represents a potential risk to these providers and it is unknown how well prepared they are for such change.

Specialised providers may be highly sensitive or vulnerable to fluctuations in the market and the funding of particular qualifications.

CERTIFICATE IV IN TRAINING AND ASSESSMENT

Enrolments in Certificate IV in Training and Assessment at specialised providers have fallen since 2014: possibly due to difficulties transitioning to the latest version of the qualification.

As shown in table 8, the average number of enrolments in the Certificate IV in Training and Assessment was higher at specialised providers than at non-specialised providers. Non-specialised providers were larger overall, as with the Diploma of Early Childhood Education and Care. In 2016, 22 providers only had program enrolments in the Certificate IV in Training and Assessment, while a further eight had more than 90% of their program enrolments in that qualification (not shown).

Table 8 Number of specialised providers of the Certificate IV in Training and Assessment and average enrolments, 2016

	Specialised providers	Non-specialised providers
Number of providers	63	447
Average number of program enrolments in the certificate IV	147	80
Average number of program enrolments in total	202	4219

Source: NCVET (2017a, 2017b).

Most common qualifications

The Certificate IV in Training and Assessment was the most common qualification studied at both specialised providers (9250 enrolments, or 73% of total) and non-specialised providers (35 965, or 2% of total). Specialised providers had a further 6% of their enrolments in the Diploma of Vocational Education and Training and the Diploma of Training Design and Development.



Table 9 Ten most common training package qualifications for providers of the Certificate IV in Training and Assessment, 2016

Specialised providers			Non-specialised providers		
Training package qualification	Program enrolments		Training package qualification	Program enrolments	
	N	%		N	%
TAE40110 - Certificate IV in Training and Assessment	9250	73	TAE40110 - Certificate IV in Training and Assessment	35 965	2
TAE50111 - Diploma of Vocational Education and Training	494	4	CHC50113 - Diploma of Early Childhood Education and Care	34 279	2
BSB41415 - Certificate IV in Work Health and Safety	391	3	CHC30113 - Certificate III in Early Childhood Education and Care	28 016	1
TAE50211 - Diploma of Training Design and Development	309	2	UEE30811 - Certificate III in Electrotechnology Electrician	24 969	1
BSB51915 - Diploma of Leadership and Management	274	2	CHC33015 - Certificate III in Individual Support	18 765	1
BSB41412 - Certificate IV in Work Health and Safety	208	2	HLT51612 - Diploma of Nursing (Enrolled-Division 2 nursing)	18 694	1
BSB40515 - Certificate IV in Business Administration	189	1	CPC30211 - Certificate III in Carpentry	16 708	1
BSB40812 - Certificate IV in Frontline Management	162	1	BSB51915 - Diploma of Leadership and Management	16 656	1
BSB42015 - Certificate IV in Leadership and Management	145	1	BSB20115 - Certificate II in Business	15 624	1
BSB51107 - Diploma of Management	142	1	CPC32413 - Certificate III in Plumbing	13 318	1
Total number of program enrolments	12 751		Total number of program enrolments	1 885 951	

Source: NCVET (2017a, 2017b).

Trends in enrolment

This section analyses the enrolment trends from 2014 to 2016 for providers who were identified as specialised providers of the Certificate IV in Training and Assessment in 2016.

Overall, total program enrolments decreased by 46% at specialised providers between 2014 and 2016 (from 23 768 to 12 751) compared with a rise of 23% at non-specialised providers (from 1 536 371 to 1 885 951). Enrolments in the certificate IV fell by 29% at specialised providers (from 13 005 to 9250), compared with a 19% decline at non-specialised providers (from 44 511 to 35 965).

This decline occurred around the time of the release of the revised Certificate IV in Training and Assessment (TAE40116). Concerns have been expressed about the time taken for the Australian Skills Quality Authority (ASQA) to assess applications from providers who wish to add the new qualification to their scope of delivery

(Australian Skills Quality Authority 2017c). The introduction of higher standards and requirements have caused the delays in processing (Australian Skills Quality Authority 2017a). As of 18 April 2016, there were no providers with the new qualification on their scope (Australian Skills Quality Authority 2017b).

The enrolment share of the Certificate IV in Training and Assessment at specialised providers increased from 55% in 2014 to 73% in 2016. By comparison, the enrolment share of the certificate IV at non-specialised providers decreased from 3% to 2%.

Table 10 Enrolments in vocational education qualifications at providers delivering the Certificate IV in Training and Assessment, 2014–16

		Specialised providers			Non-specialised providers		
		2014	2015	2016	2014	2015	2016
TAE40110 - Certificate IV in Training and Assessment	N	13 005	11 471	9 250	44 511	41 259	35 965
	%	55	70	73	3	3	2
TAE50111 - Diploma of Vocational Education and Training	N	563	637	494	1160	1398	1530
	%	2	4	4	<1	<1	<1
Total program enrolments across all qualifications		23 768	16 385	12 751	1 536 371	1 524 249	1 885 951

Source: NCVET (2017a, 2017b).

While enrolments in the Certificate IV in Training and Assessment have declined at specialised providers, the share of enrolments they represent has increased. The total enrolments at specialised providers have declined alongside enrolments in the certificate IV. Specialised providers may have downsized or left the market altogether, although enrolments may recover once more providers gain approval to deliver the revised qualification.

Student demographics

A higher proportion of students studying the Certificate IV in Training and Assessment at specialised providers resided in major cities, compared with students at non-specialised providers (64% compared with 59%). Although the difference was not as large as for the Diploma of Early Childhood Education and Care, it may still indicate that specialised providers need to seek larger markets to remain viable.

Table 11 Enrolments in the Certificate IV in Training and Assessment by student remoteness region (2011 ARIA+), 2016

		Major cities	Inner regional	Outer regional	Remote	Very remote	Outside Australia	Not known	Total number of enrolments
Specialised	N	5891	1796	763	152	91	183	374	9250
	%	64	19	8	2	1	2	4	
Non-specialised	N	21 048	6761	3834	831	444	1708	1339	35 965
	%	59	19	11	2	1	5	4	

ARIA = Accessibility/Remoteness Index of Australia.
Source: NCVER (2017a, 2017b).

The socio-economic profile of the certificate IV students at specialised and non-specialised providers was similar. Specialised providers had a slightly higher percentage of students in quintile 4 (23% compared with 22%) and quintile 5 (20% compared with 19%), which contrasts with the different profiles among specialised and non-specialised providers delivering the Diploma of Early Childhood Education and Care, presented earlier.

Table 12 Enrolments in the Certificate IV in Training and Assessment by student socio-economic status (SEIFA IRSD 2011), 2016

		Quintile 1: Most disadvantaged	Quintile 2	Quintile 3	Quintile 4	Quintile 5: Least disadvantaged	Not known	Total number of enrolments
Specialised	N	1306	1667	1790	2082	1820	585	9250
	%	14	18	19	23	20	6	
Non-specialised	N	4887	6474	7040	7800	6677	3087	35 965
	%	14	18	20	22	19	9	

Note: Socio-economic status is calculated based on students' residential address.
Source: NCVER (2017a, 2017b).

Funding and delivery

Specialised providers delivered a higher percentage of delivery hours as fee-for-service compared with non-specialised providers (95% of hours compared with 83%). This is similar to the situation in the Diploma of Early Childhood Education and Care.

Table 13 Hours of delivery by funding source for subjects enrolled in as part of the Certificate IV in Training and Assessment, 2016

	Specialised		Non-specialised	
	N	%	N	%
Commonwealth and state funding	210 043	5	2 757 785	17
Domestic fee-for-service	4 371 259	95	12 983 976	79
International fee-for-service	14 600	<1	706 840	4
Total number of hours	4 595 902		16 448 601	

Source: NCVER (2017a, 2017b).

Compared with non-specialised providers, specialised providers delivered more electronic-based training as a percentage of the total hours delivered (25% of hours compared with 9%). This is in contrast to the situation for the Diploma of Early Childhood Education and Care, where specialised providers delivered a lower proportion of training electronically compared with non-specialised providers.

Table 14 Hours of delivery by delivery type for subjects enrolled in as part of the Certificate IV of Training and Assessment, 2016

	Specialised		Non-specialised	
	N	%	N	%
Classroom	2 338 705	51	10 439 339	63
Electronic	1 128 880	25	1 446 440	9
Employment	31 765	1	635 951	4
Other	430 689	9	1 507 018	9
Not applicable – recognition of prior learning	665 863	14	2 419 853	15
Total number of hours	4 595 902		16 448 601	

Source: NCVET (2017a, 2017b).

Summary

The case of the Certificate IV of Training and Assessment is exceptional, in that its transition from the 2010 version to the 2016 version received particular attention from the Australian Skills Quality Authority. Providers who had been delivering the 2010 version also experienced delays in gaining approval to deliver the 2016 version due to higher standards and requirements. Despite being released in April 2016, there were only 11 enrolments in the revised version across the entire sector in 2016. The transition period for the 2010 version (during which it could still be issued as a qualification) was 18 months and finished in October 2017 (Australian Skills Quality Authority 2017d).

The decline in enrolments in the 2010 version between 2014 and 2016 may have been due to students waiting for the release of the latest version, or providers choosing to focus on other training, given the delays and difficulties with the release of the new version. This provides a demonstration of the potential risks faced by specialised providers in a tightly regulated market and the difficulties that could be encountered by the specialised providers of the Diploma of Early Childhood Education and Care (and of any qualifications that benefit from substantial government funding, subsidies or assistance).

Specialised providers tend to be smaller overall than non-specialised providers, with their size being potentially a strength or weakness. If their smaller size means that specialised providers are able to pivot and react more quickly to conditions in the market, then it would be advantageous. However, if specialised providers are dependent on certain qualifications and are not sufficiently diversified to cope with fluctuations in the market, then it could be detrimental.

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