This is an alternative text version of *VET provider market structures - perceptions vs reality: infographic*. It is designed to be read via a screen reader and consequently has had all visual elements removed. Please see the original version available at <https://www.ncver.edu.au/publications/publications/all-publications/vet-provider-market-structures-infographic> if you wish to view the full version.

# VET provider market structures - perceptions vs reality

Increasing competition in the Australian vocational education and training (VET) sector over the last two decades means it is timely to understand how this has changed the structure of the VET market. Based on findings from the report VET provider market structures: history, growth and change by Patrick Korbel and Josie Misko, this infographic addresses some common perceptions of the VET market structure.

For a more complete picture, the full report is available at <http://www.ncver.edu.au/publications/2871.html>.

## Perception

TAFE institutes are large. Private providers are small.

## Reality (what the data show)

While the majority of private providers are small - there are a number of large private providers too.

* The number of TAFE institutes with up to 1 000 students was 1, whereas there were 2 102 private providers with the same range of students.
* The number of TAFE institutes with between 1 000 and 10 000 students was 19, whereas there were 431 private providers with the same range of students.
* The number of TAFE institutes with over 10 000 students was 37, whereas there were 24 private providers with the same range of students.

Source: National VET Provider Collection, 2014, NCVER, Adelaide.

## Perception

The number of providers entering the VET market keeps increasing.

## Reality

Fewer new providers entered the market between 2011-2015 than in previous years.

Five year summaries - average number of initial provider registrations per year:

* During 1996 through to 2000, the average number of initial provider registrations were 873.
* During 2001 through to 2005, the average number of initial provider registrations were 471.
* During 2006 through to 2010, the average number of initial provider registrations were 479.
* During 2011 through to 2015, the average number of initial provider registrations were 275.

Source: Based on data request from the Department of Education and Training. Department of Education and Training, 2016, ‘All RTOs grouped by initial registration year(s)’, data requested January 2016.

## Perception

New providers dominate VET FEE-HELP (VFH).

## Reality

In the top 20, only one VFH provider registered after the introduction of the scheme.

The top 20 VET FEE-HELP providers in 2014 represent 76.1% of all 2014 VET FEE-HELP activity.

Please note: Top 20 providers in 2014 are determined by the total amount of loans.

Source: Based on 2014 VET FEE-HELP Statistical Report and data request from the Department of Education and Training. Department of Education and Training, 2015, ‘2014 VET FEE-HELP statistical report – provider tables’, viewed March 2016, <https://docs.education.gov.au/node/38381>. Department of Education and Training, 2016, ‘All RTOs grouped by initial registration year(s)’, data requested January 2016.

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