Australian Government
Australian Skills Quality Authority

ASQA

ASQA's strategic review of online learning

Insights paper No. 3

Provider survey

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Introduction

The Australian Skills Quality Authority (ASQA) is undertaking a Strategic Review of Online Learning in the vocational education and training (VET) sector. We initiated the strategic review in 2020, prompted by the significant number of providers who shifted their online delivery posture in response to the circumstances created by the coronavirus (COVID-19) pandemic. This insights paper shares findings from a detailed online learning provider survey ('the survey'), jointly administered with the National Centre for Vocational Education Research (NCVER). The survey was open to all ASQA-regulated providers from February to March 2021.

This insights paper is the third in a series. The series is intended to build on the success of the innovative 'feedback loop' approach of collaboratively sharing learnings and building understanding throughout the strategic review. The first insights paper shared early findings from 3 'feedback loop' webinars held between December 2020 and May 2021. The second insights paper shared findings from focus groups held in early 2021 with VET and Education Services for Overseas Students (ESOS) who experienced shifts to online in response to COVID-19. These papers are available on our website. A fourth paper is under development and will consider the relationship between online learning and student choice. The fourth paper will be followed by a final report that will conclude the strategic review.

There are several caveats noted throughout this paper that are important to keep in mind. These caveats advise caution when interpreting the data for a range of reasons. For instance, in some cases responses may represent a partial picture due to small sample sizes. For example, by provider organisation type, there were only 5 universities and 15 TAFEs that took part. In addition, the survey was conducted in February – March 2021, and we know the coronavirus pandemic has continued with resulting impacts on the VET sector. Please keep these caveats in mind when engaging with this paper's insights.

The results of this survey are of immense value in building understanding of providers' experiences of moving online a year after the start of the pandemic. For example, a considerable proportion of providers (62%) who shifted to online learning in response to COVID-19, indicated that they were likely to employ more blended learning (a combination of digital learning and in-class, face-to-face learning) in the future. It will be interesting to monitor to what extent blended learning and other forms of online delivery become part of providers' delivery models into the future. Understanding provider experiences in early 2021 helps to guide us and the sector to identify ways to continuously improve in what is a rapidly evolving delivery mode.

The results in this paper are shared as part of ongoing iterative publication of early insights from the strategic review of online learning. These insights will continue to be explored and refined as the fourth paper is developed and the strategic review concludes with a final webinar and report in the first half of 2022. The final report will build on the learnings and insights developed during the strategic review to identify actions and recommendations that will support embedding quality online learning in the VET sector. This paper presents results of the survey. The analysis of this data, including the drawing together of issues and forming conclusions, will be presented in the final report.

Insights

This paper is structured into 2 key parts. Firstly, we identify overarching key insights from responses to the survey. Secondly, we provide the supporting data from the survey results, presented through graphs and tables (Figures 1 to 30) and accompanying text that contextualises responses. The paper concludes with a brief summary that includes an observation of two broad types of postures found in the survey responses. We also point to some suggested resources to continue to support quality VET when delivering online.

One posture is that online learning compromises VET quality. From this vantage point, a common view was that VET is practical and practical skill development and assessment cannot be done online or if done that way will be compromised. The other posture is that the new conditions offered an opportunity to step back and review operations with a view to shifting to online delivery in a considered and integrated way. Providers in this category often felt compelled to move but did so in a way that was future focused. There were a range of positive approaches evident in this posture, and some benefits presented that included improved quality of delivery.

Definitions of key terms are included on page 7.

Overall impact of COVID-19 on delivery modes

All providers (excluding those already delivering fully online) made significant changes to increase their use of online delivery in response to COVID-19.

- Nearly two-thirds of providers who were not delivering any online learning pre-COVID-19, incorporated online delivery in some form in response to COVID-19.
- The biggest survey respondent by organisation type were private training providers (number=951)[1], who went from 6.2% fully online (including face-to-face work placement) pre-COVID-19 to 38% post-COVID-19.

A considerable proportion of providers (62%) who shifted their online delivery posture in response to COVID-19, indicated that they were likely to utilise more blended learning (a combination of digital learning and in-class, face-to-face learning) in the future. In addition, almost a quarter (22%) of providers stated they were likely to permanently shift more units/parts of qualifications online, and a further 11% were likely to permanently shift more full qualifications online. These responses indicate COVID-19 has influenced many providers to consider permanently shifting more of their training and assessment to online delivery. ASQA is using this insight to continue to identify ways to support the sector delivering quality VET online regardless of the circumstances of the pandemic.

The 3 provider types that delivered the lowest proportions of training online pre-COVID-19 were:

- community education providers
- enterprise registered training organisations (RTOs)
- private training providers.

Pre-COVID-19, all 3 provider types delivered around 50% fully face-to-face (F2F). In response to COVID-19, this dropped to around 20% fully F2F. This suggests a significant number of providers in those 3 provider types that moved online may have done so with no (or limited) experience delivering online prior to COVID-19.

1 Throughout the paper the number of responses will be abbreviated to 'n=' rather than 'number='.

VET delivered to international students

The 1,247 survey respondents nominated the student base they provide education and training to as domestic (n=1,106), international onshore (n=290) and international offshore (n=143). Some providers nominated more than one category because they deliver to more than one of these student types.

Of the survey respondents, nearly 30% of providers delivering to international onshore students moved to fully online and nearly 90% moved at least some training or assessment online. Providers delivering to international offshore students had over 25% move to fully online and over 80% move at least some training or assessment online. Providers of English Language Intensive Courses for Overseas Students (hereafter referred to as ELICOS providers) reported transitioning to fully online (31.4%) and blended (35.8%) modes of delivery. This was a significant transition. This change was influenced by the temporary regulatory flexibility for full online delivery extended to ESOS providers, which includes ELICOS providers, in response to the pandemic.

Training packages

The COVID-19 pandemic had a major impact on the delivery methods of most training packages, with an increase of online delivery across most. Among the top 5 training packages that survey respondents were registered to deliver, the incidence of online delivery pre- and in response to COVID was as follows (in the order of the most likely to shift fully online[2]):

- Community Services (CHC): 3% fully online pre-COVID-19, and changed to 48% fully online post-COVID-19
- Business Services (BSB): 7% fully online pre-COVID-19, and changed to 43% fully online post-COVID-19
- Travel, Tourism and Hospitality (SIT): 5% fully online pre-COVID-19, and changed to 38% fully online post-COVID-19
- Health (HLT): 3% fully online pre-COVID-19, and changed to 30% fully online post-COVID-19
- Construction, Plumbing and Services (CPC): 3% fully online pre-COVID-19, and changed to 21% fully online post-COVID-19

The providers with these training packages on scope that remained fully face-to-face post-COVID-19, were asked for the main reason they didn't shift any delivery online. Of providers registered to deliver CPC, 42% reported 'subject matter not suitable for online delivery' and 41% 'online delivery not suitable for students'. Of providers registered to deliver BSB, 41% reported 'online delivery not suitable for students'. Despite these reasons given for not shifting any delivery of these training packages online, there was a high incidence of providers that did shift these training packages online.

Over one-quarter of providers remained fully face-to-face and did not transition any delivery online in response to COVID-19. The training packages providers identified as *least* likely to shift online in response to COVID-19 were Forest and Wood Products (FWP), Defence (DEF) (noting their small sample size, n=9), Manufacturing (MSM) and Chemical, Hydrocarbons and Refining (PMA). Providers reported that these training packages were largely delivered face-to-face prior to COVID-19. This may suggest that these training packages were deemed not suitable for online delivery by the provider, and/or were too difficult to shift online in response to the pandemic at the time of the survey.

There may be a range of reasons why these training packages – FWP, DEF, MSM, PMA, CPC, BSB, SIT, CHC, HLT – changed in this way and we will consider these as part of the strategic review.

2 'Fully online' refers to the proportion of providers who delivered the training package 100% online, 100% online (excluding practical work placements).

Practical assessments and mandatory work placements

The survey results indicate that face-to-face work placements were less able to change to online to the same extent as other aspects of the delivery of VET. Practice of manual or interpersonal skills and practical demonstrations for formative or summative assessment are a common requirement of training packages. This created a special range of challenges for providers. Of those providers whose training included mandatory work placements and practical assessments, some were unable to support completion of these placements and assessments.

Given the continued social distancing restrictions in place in Australia since the survey was undertaken in February-March 2021, it is unclear what the continued impacts of these delays between theoretical and practical study have been. It is possible that some students have been unable to complete practical assessments and mandatory work placements as originally intended.

Barriers to shifting online

Most common obstacles identified by providers for transitioning to online training and assessment included:

- The online delivery method is not suitable for students
  - Almost three-quarters (71%) of respondents that shifted some training online reported that online delivery was not suitable for some student learning preferences. In addition, in responses to open-ended questions, students were described by many respondents as a population that could benefit from provision of greater support to enhance digital literacy. Some providers reported offering induction and/or training specifically to address this.
  - Observations of student experiences of online learning also drew attention to difficulties maintaining student engagement and motivation over the longer term. It was suggested that students could feel isolated – from other students and their teachers/trainers – and that the sense of isolation could result in progressive disengagement and non-completion. At the same time, many survey respondents reported that interactions between students and teacher/trainers can increase in the online environment. For some providers, increased communication with students was part of a deliberate strategy to maintain engagement and completion rates, and a view that digital technology inherently promoted closer learning relationships.
- The subject matter is not suitable for online delivery
  - VET is traditionally associated with practical skill learning and assessment, and that focus is still important for many industries. Practical training and assessment are identified with manipulation of materials and equipment and dealing with people in service roles. This kind of training and assessment can be difficult to disentangle from physical, in-person engagement. A significant number of respondents described quality maintenance strategies that involved delaying, suspending or cancelling training and/or assessment. A common reason offered by survey respondents for these strategies was that face-to-face delivery and assessment was a requirement (of training package rules or regulators – sectoral and/or industry) and that shifting any of these activities online was not allowable.

Technology and digital platforms

The characteristics of online learning being delivered by providers is influenced by a range of factors. These include the type of content, the context of delivery and student capabilities, as well as the resources and preferences of providers.

The survey results tentatively suggest that pre-COVID-19 and in response to COVID-19, providers focused on technology that delivers ‘web-supported’ online learning, such as Learning Management Systems (LMS). There was less focus on digital tools for interactive online learning, such as quiz tools (17%), virtual or augmented reality (VR/AR) tools (4%), or artificial intelligence/machine learning (AI/ML) tools (2%). It is to be expected that these practices will have continued to emerge and mature since the time of the survey.

There were some marginal differences in the use of technology across providers of differing sizes prior to COVID-19. Large providers were slightly more likely to be using an LMS and a wider range of technologies than smaller providers. This may be explained by larger providers having access to more financial resources. Irrespective of provider size, meeting platforms were the type of technology most likely to be acquired or upgraded by providers in response to COVID-19. This suggests meeting platforms were a minimum requirement for providers to continue operating during COVID-19.

Providers’ views of the impact of COVID-19

Overall, the survey results showed that providers perceived that trainers and assessors adapted well to the shift online. For example, of the 893 providers that reported they transitioned to online delivery (to any extent), 84% reported a view that their trainers/assessors adapted reasonably or very well. Providers expressed confidence that challenges of the rapid transition online were met, and quality was maintained. Not all survey respondents described success, but most did, suggesting that, in general, from a provider perspective, Australian VET navigated COVID-19 in a way that minimised disruption.

Provider survey at a glance

In February 2021, ASQA launched a survey of the VET sector's use, experience, and perceptions of online learning as part of our strategic review of online learning ('the survey'). This survey was designed to build understanding of the extent to which VET and English language training providers moved online in response to COVID-19. This understanding is part of identifying the opportunities, challenges, and risks this may pose to the quality of VET in Australia. The survey examined the nature and range of delivery modes providers are using to deliver online learning. This included a focus on identifying whether there are regulatory barriers to sector innovation and growth in online delivery, and how the shift to online learning during COVID-19 might change the way VET is delivered and assessed in the long term.

The survey had 8 sections:

- About your organisation
- Delivery modes pre-COVID-19
- Impact of COVID-19
- Technology and digital platforms
- Experiences of trainers and assessors
- Experiences of students
- Perceptions of online delivery
- Future plans in relation to online learning

ASQA collaborated with the National Centre for Vocational Education Research (NCVER) to develop the survey. The survey was distributed to all registered ASQA-regulated Australian VET providers on 19 February 2021 and was open for one month.

A total of 1,247 provider responses to this survey were received. This corresponds to a response rate of 38% of the ASQA-regulated VET provider population.

The provider type, size, and student base are similar between the provider respondent group for this survey, and the broader ASQA-regulated provider population.

Survey sample demographics

Figure 1. Demographics of survey population vs broader ASQA-regulated population

	Survey respondent population	ASQA-regulated provider population
Private provider	76%	81%*
ELICOS providers	11%	8%*
Less than 200 student enrolments	52%	42%^
Delivering VET to domestic students	88%	93%^
Delivering VET to international students	27%	22%^

* asqanet data as at 31 March 2021

^ Total VET Activity delivery data reported to NCVER for the 2020 calendar year (cumulative)

Sources: ASQA-NCVER provider survey February-March 2021 (the survey), asqanet, NCVER Total VET students 2020

Note: Some providers deliver to both domestic and international students and that is why the survey respondent population and the ASQA-regulated provider population do not total 100%.

Key Terms

Blended = a mixture of online and face-to-face delivery.

COVID-19 = coronavirus pandemic. The first confirmed case in Australia was on 25 January 2020.

Fully F2F = 100% face-to-face. All courses on scope of registration were delivered 100% face-to-face.

Fully online = 100% online. All courses on scope of registration were delivered 100% online.

Fully online (w/F2F WP) = Fully online with face-to-face work placement. All courses on scope of registration were 100% online (except practical work placements).

Post-COVID-19 = for the purposes of reporting on this survey, this term is used to refer to the point in time that respondents completed the survey between mid-February and mid-March 2021. ASQA acknowledges that at the time of the publication of this paper (February 2022), Australia is still experiencing the impacts of COVID-19.

Pre-COVID-19 = for the purposes of reporting on this survey, this term is used to refer to the period up to approximately mid-January 2020.

The survey = survey of training providers jointly administered with NCVER and conducted from February to March 2021.

Pre-COVID-19 vs post-COVID-19 delivery methods

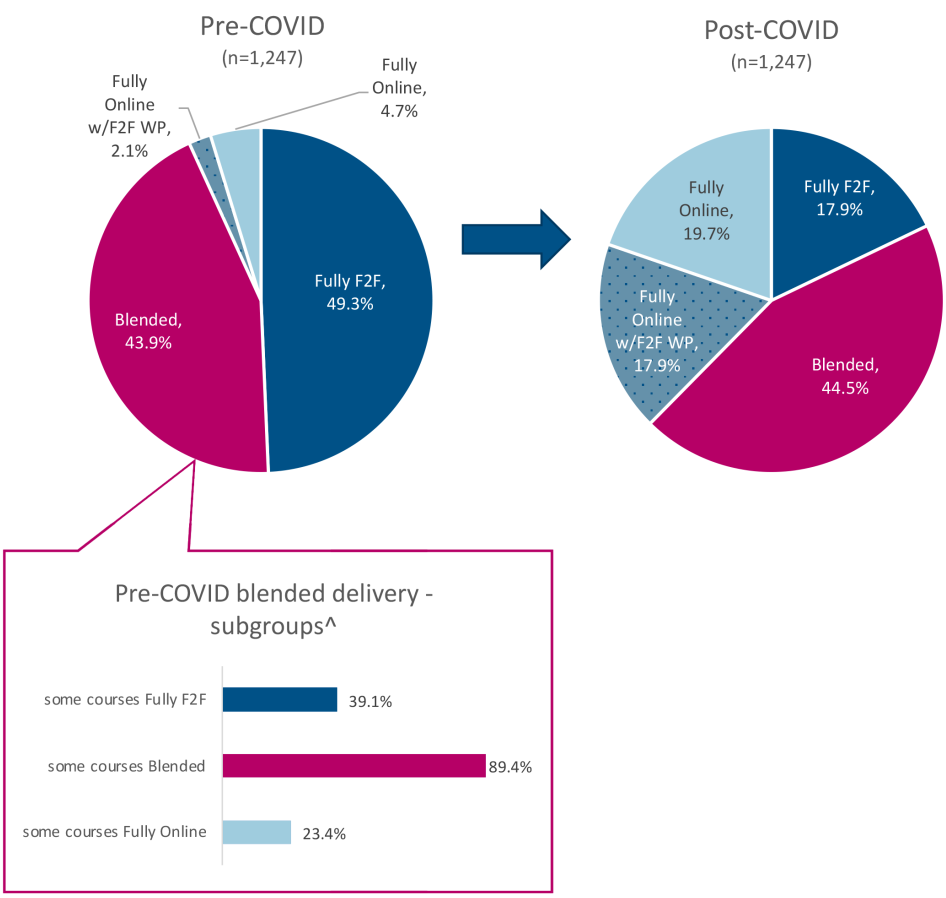
Survey population delivery modes

Prior to COVID-19, just over half (50.7%) of providers that responded to the survey reported they delivered at least some training or assessment online (43.9% blended, 4.7% fully online and 2.1% fully online w/F2F WP). Fully F2F providers made up just less than half (49.3%) of providers pre-COVID-19. The fully online cohort making up 6.8% of the population is consistent with other similar research. For example, NCVER (2019) reports that 8.6% of VET courses are delivered fully online.

The post-COVID-19 results show providers in all delivery methods pre-COVID-19 (barring those already fully online) made significant changes to increase their use of online delivery. The fully F2F cohort decreased by over 30% post COVID-19 and the fully online cohorts moved from a combined 6.8% pre-COVID-19 to 37.6% post-COVID-19, an increase of over 30%. Nearly half of the post-COVID-19 fully online cohort were providers that still reported face-to-face work placement. This is a greater percentage than expected when considering the split of the 2 fully online cohorts pre-COVID-19, where only approximately one-third had the face-to-face work placement. It may indicate that some providers are reluctant, unable to, or are not permitted (based on training package requirements) to exclude the face-to-face work placement.

The further breakdown of the pre-COVID-19 blended cohort provides insights into how these providers structure their delivery, with most also using a blended approach within the courses they deliver.

Figure 2. Pre-COVID-19 vs post-COVID-19 - survey population delivery modes and subgroups of blended delivery*



*The sub-group of post-COVID-19 blended cannot be determined from the data.

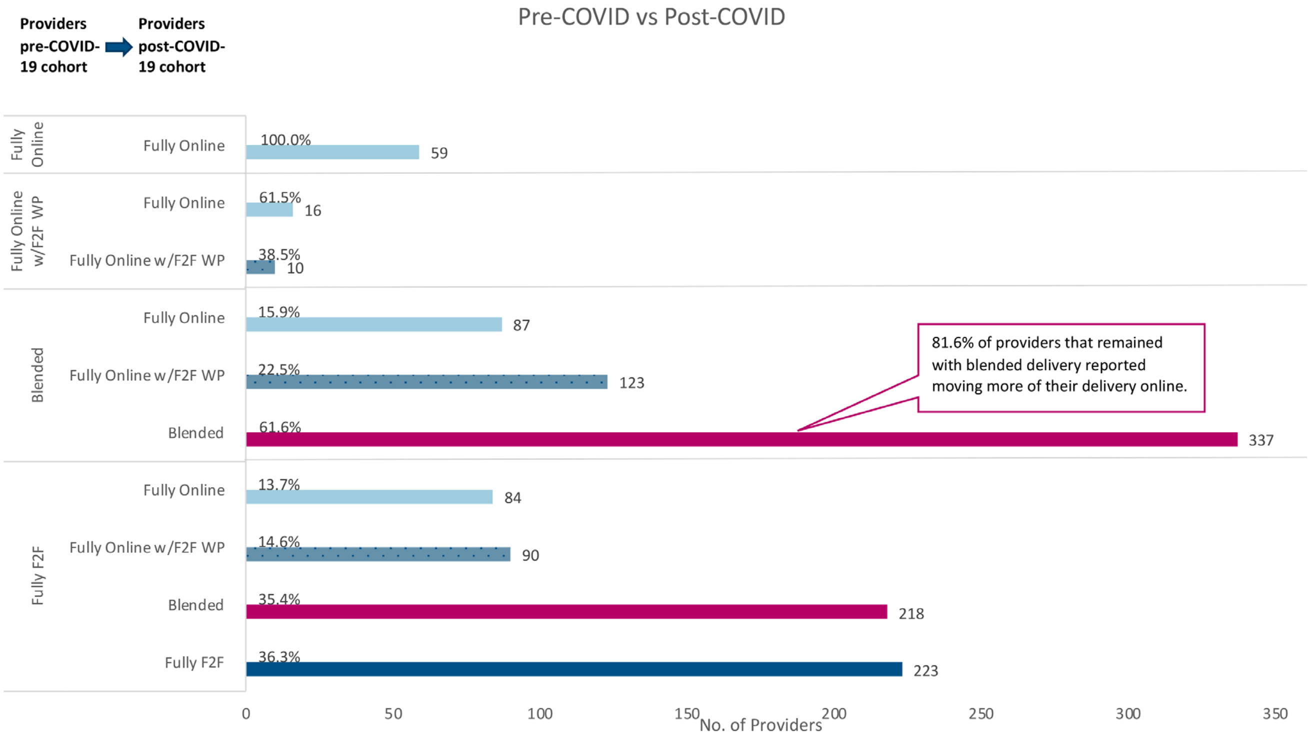
^Percentages will not total 100% as more than one category may have been applicable to a provider.

How each pre-COVID-19 delivery cohort changed as a result of COVID-19

Across all delivery modes the COVID-19 pandemic was an enormous catalyst for change to more online delivery, whether it was organisations that completely remodelled their whole training and assessment strategy or those that just made changes to certain aspects of their delivery or work placements. For example, the number of providers that incorporated online delivery (to any extent) in their training and assessment strategy prior to COVID-19 was 632 providers, that increased to 1,024 post-COVID-19. Another example is that of providers that were fully online w/F2F WP pre-COVID-19, 60% of those providers changed the face-to-face work placement to online.

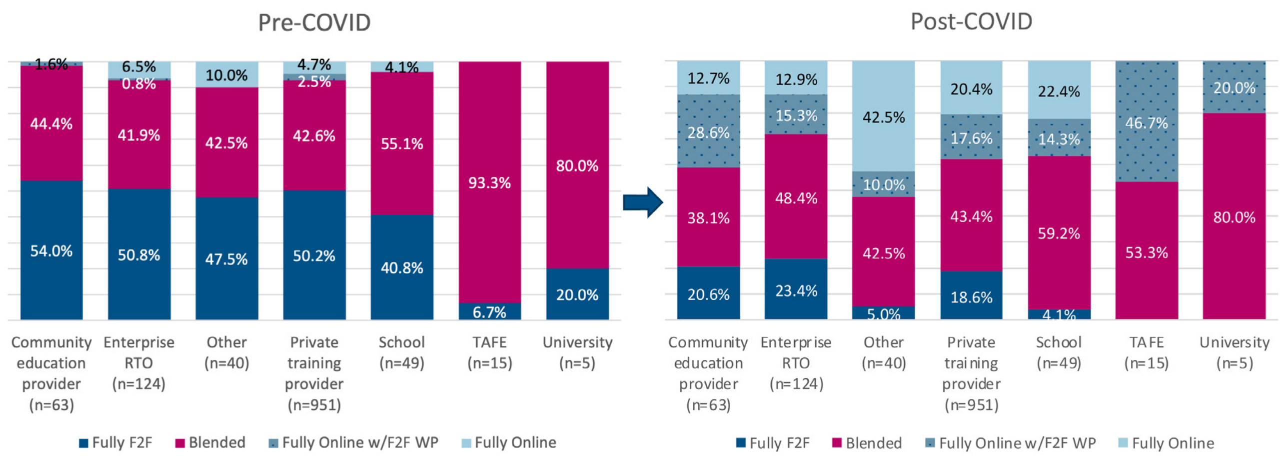
Figure 3 shows how the providers within specific pre-COVID-19 delivery cohorts changed their delivery as a result of COVID-19. It shows how providers who were fully F2F pre-COVID-19 had just over one-third of the providers remain fully F2F, another one-third move to blended delivery and the remaining one-third to fully online w/F2F WP and fully online. This indicates that nearly two-thirds of providers who were not delivering anything online pre-COVID-19 chose to make changes to incorporate online delivery.

Figure 3. Pre-COVID-19 vs post-COVID-19 – pre-COVID-19 delivery cohorts



The below 3 charts in Figures 4 to 6 represent the pre-COVID-19 to post-COVID-19 differences for various subsections of providers.

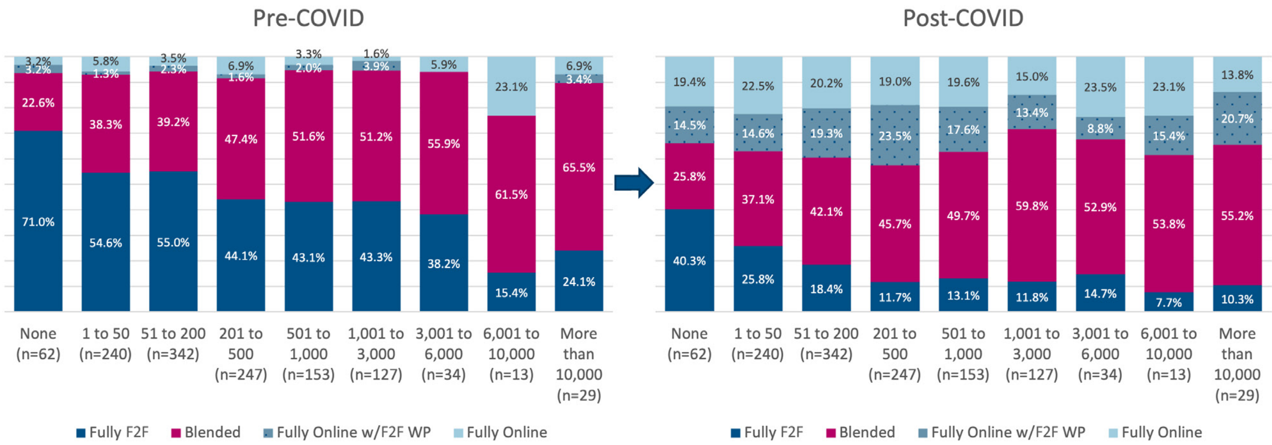
Figure 4. Pre-COVID-19 vs post-COVID-19 – organisation type



Note: Please exercise caution when interpreting these results due to small sample sizes for University (n=5) and TAFE (n=15). Nonetheless, one of the university respondents reported being a provider than enrolled between 6,001 and 10,000 students.

Three provider types who had the least online training pre-COVID-19 (Figure 4) were community education providers, enterprise RTOs and private training providers. Pre-COVID-19, all 3 delivered around 50% fully F2F. In response to COVID-19, this dropped to around 20% fully F2F. This suggests a significant number of providers in those three provider types that moved online may have done so with no (or limited) experience delivering online prior to COVID-19.

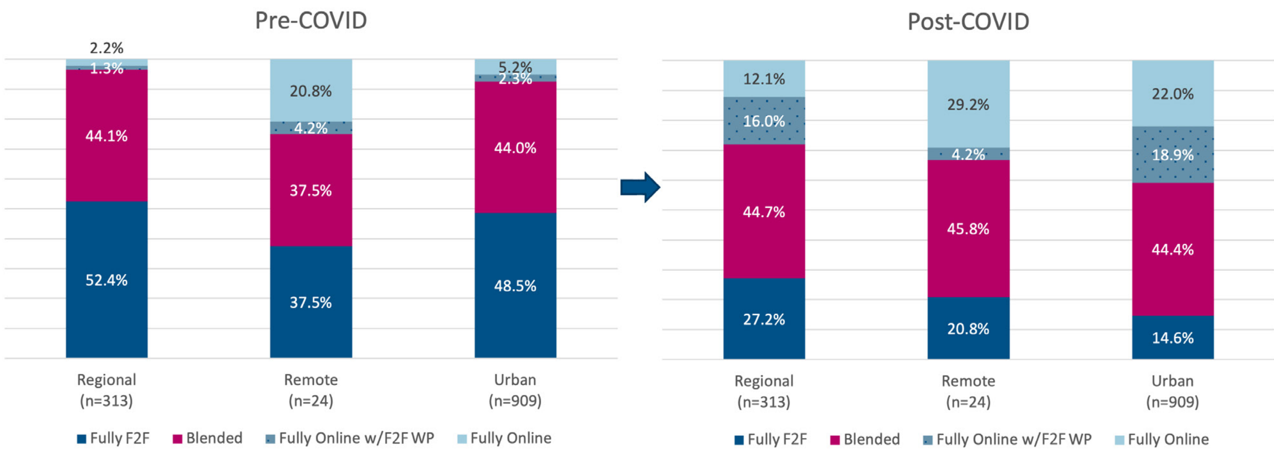
Figure 5. Pre-COVID-19 vs post-COVID-19 – provider size



Note: Please exercise caution when interpreting these results due to small sample sizes for providers with 3,001 to 6,000 (n = 34), 6,001 to 10,000 (n = 13) and more than 10,000 (n = 29).

Note: Provider size is self-reported by survey respondents when asked how many unique student enrolments they had as at 1 March 2020.

Figure 6. Pre-COVID-19 vs Post-COVID-19 – location



Note: Please exercise caution when interpreting these results due to the small sample size for Remote (n=24).

Note: Location is determined by a provider's principal place of business.

Note: One provider responded that their principal place of business was overseas.

How providers transitioned delivery online in response to COVID-19

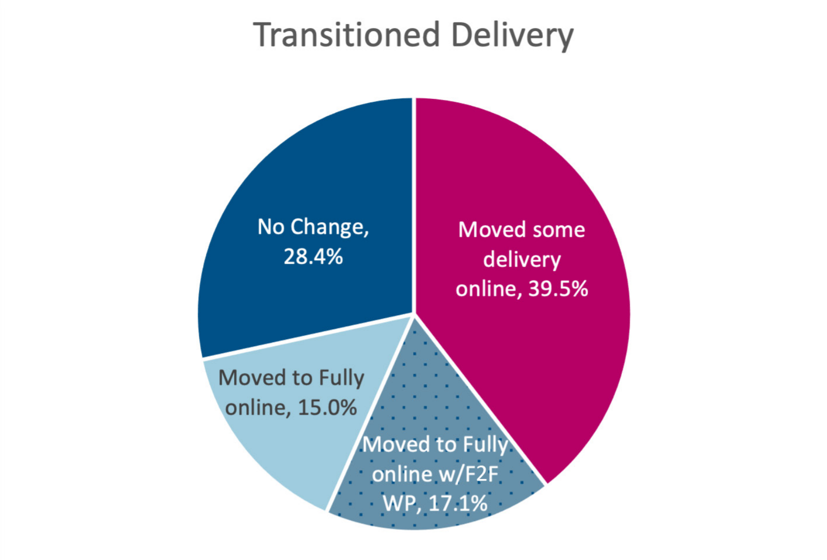
Who made a change? Providers that transitioned delivery online^ as a result of COVID-19

As shown in Figure 7, of the 1,247 survey respondents, nearly three-quarters (71.6%*) of providers stated they transitioned all or part of their delivery to online in response to COVID-19, regardless of provider size, type, and other factors such as geographical location. Conversely, over one-quarter (28.4%) of providers remained Fully F2F, reporting they did not transition any of their delivery.

^ Transitioned delivery online means a transition of all scope, individual scope items and/or face-to-face work placement.

* This figure can also be represented as 75.2% (893/1,188) instead of 71.6% (893/1,247) depending on the total population being considered as: (1) the whole survey population or: (2) the whole survey population less those providers that noted they were fully online pre-COVID-19 (59) as they had no F2F delivery to transition online. This does not include those that were fully online (w/F2F WP) (26).

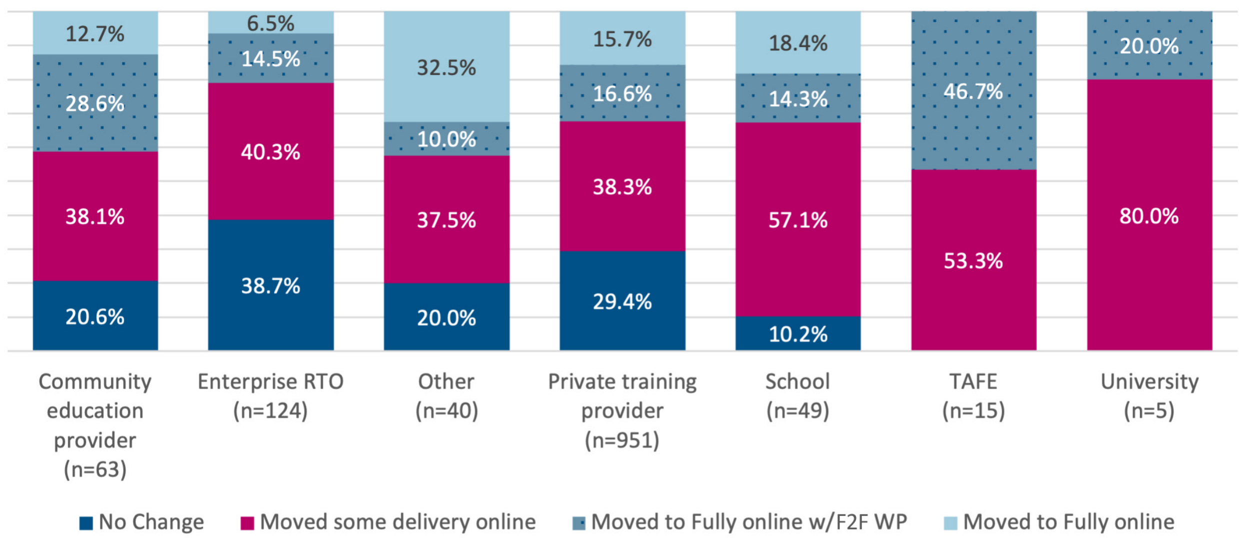
Figure 7. Transitioned delivery online – survey population



Transition of delivery occurred across all provider types in response to COVID-19 (see Figure 29 in the Appendix for transitioned delivery online by provider size).

The following 2 charts in Figures 8 and 9 represent the transitioning of delivery online for various subsections of providers.

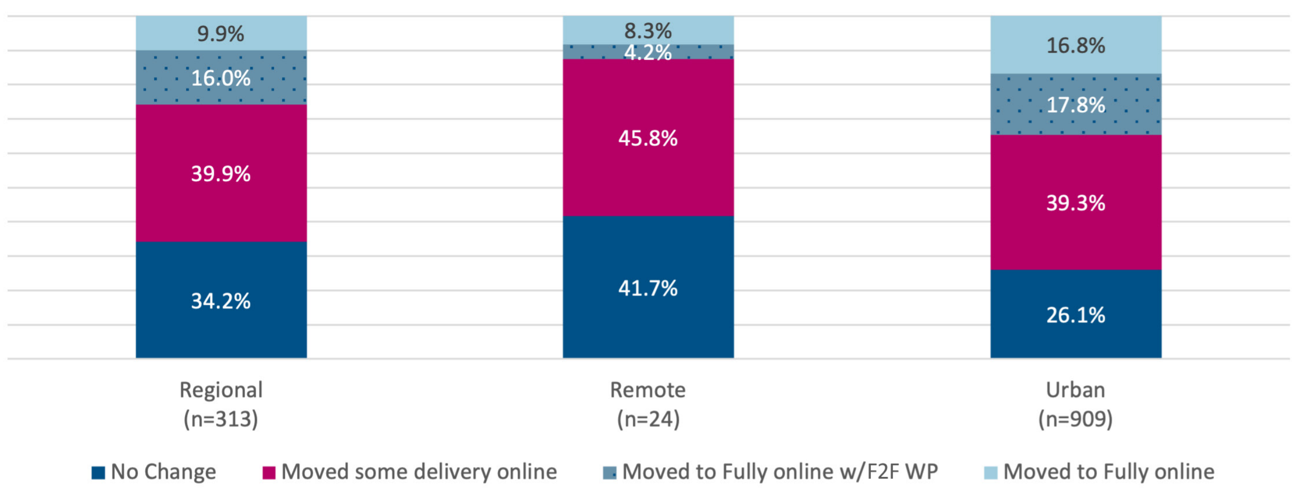
Figure 8. Transitioned delivery online – provider type



Note: Please exercise caution when interpreting these results due to small sample sizes for TAFE (n=15) and University (n=5).

More than half of providers, regardless of whether they are based in an urban, regional or remote location, transitioned some delivery in response to COVID-19. However, providers based in remote locations, albeit with a small sample size, had the lowest portion of providers that transitioned delivery modes. This could be for many reasons and might demonstrate that providers and/or students from remote locations were less equipped to move online than providers based in urban or regional locations. Or it may suggest that COVID-19 pressures did not require the transition online as much as for urban and regional providers. Given the small sample size, it is difficult to draw further conclusions.

Figure 9. Transitioned delivery online – location



Note: Please exercise caution when interpreting these results due to the small sample size for Remote (n=24).

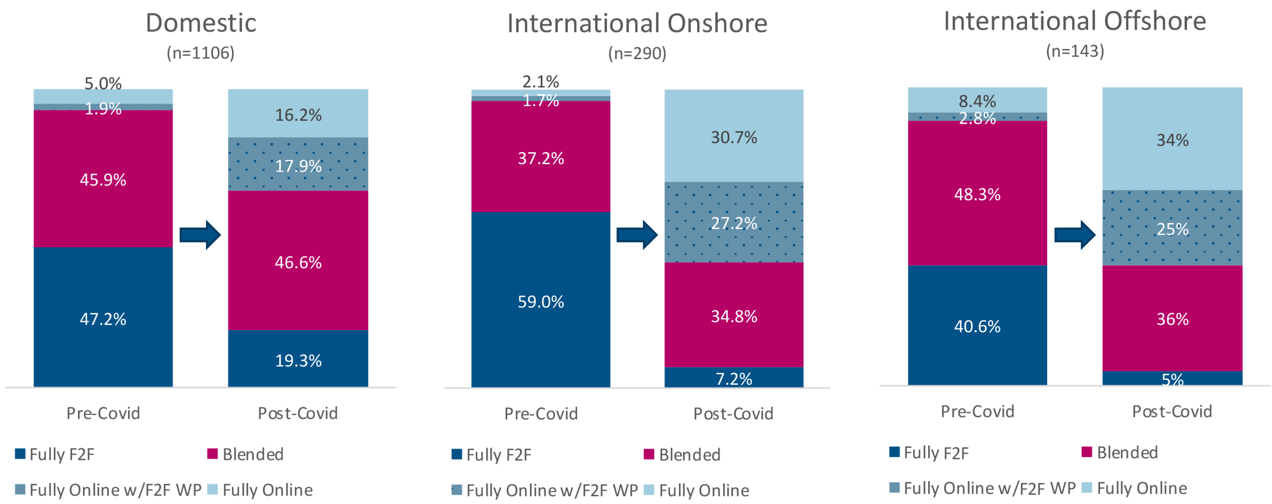
Note: Online in this context means any portion of a provider's delivery is online.

Student base (domestic, international onshore, international offshore)

Survey respondents were asked to report what best described their student base. Respondents were asked to select all that apply. This means that the cumulative total of providers from each student base will be more than the unique 1,247 providers who responded to the survey.

Figure 10 represents the pre-COVID-19 to post-COVID-19 differences for the three 3 bases.*

Figure 10. Pre-COVID-19 vs post-COVID-19 – domestic, international onshore and international offshore



*Please remember providers can deliver to students in multiple student bases, and the delivery type categories (fully F2F, fully online, etc.) represent the delivery type to all students at a provider. Therefore, within the blended cohort, it cannot reliably be identified which student base received which delivery mode.

Note: The small number of responses that indicated providers were delivering fully online to international onshore students prior to COVID-19 is likely to be based on a misunderstanding of the particular survey question.

ESOS providers

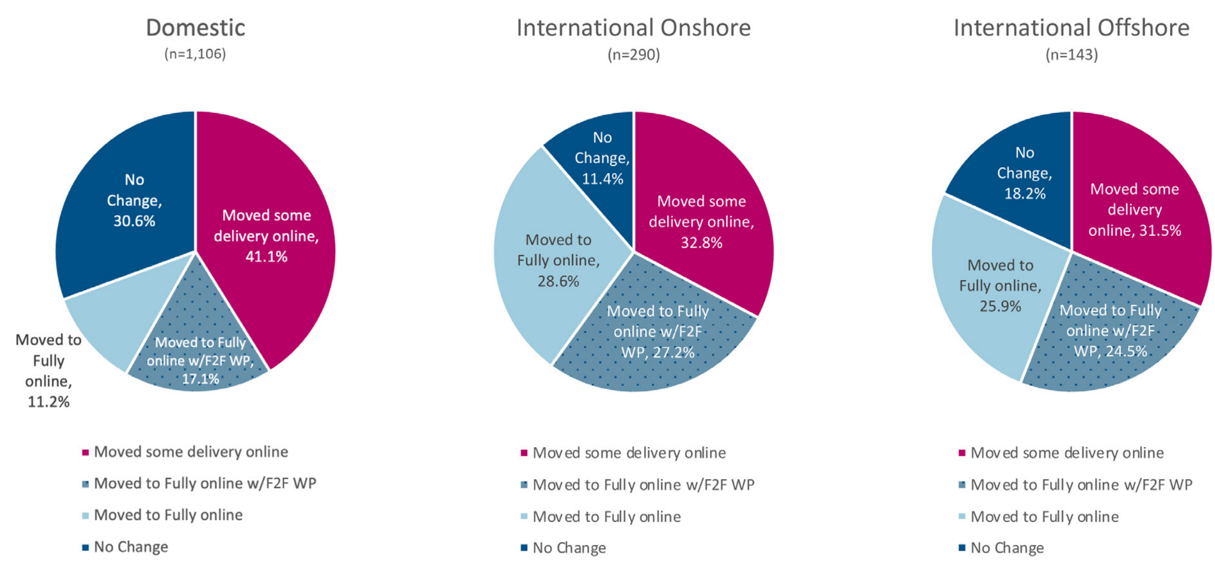
ELICOS is the common abbreviation for English Language Intensive Courses for Overseas Students. Of providers delivering VET to international students and ELICOS students, known as ESOS providers, none were permitted to deliver training and assessment purely online prior to COVID-19. This is because under Standard 8.19 of the National Code of Practice for Providers of Education and Training to Overseas Students 2018 (National Code 2018), a legislative instrument made under the Education Services for Overseas Students Act 2000 (ESOS Act), registered providers can offer overseas students no more than one-third of their course online. While ASQA is an ESOS agency under the ESOS Act, the Department of Education, Skills and Employment (DESE) is responsible for administering the Act.

In response to COVID-19, regulatory flexibility for full online delivery was temporarily extended to ESOS providers. It is evident from this survey that many providers delivering to international students utilised this temporary flexibility. For example, nearly 30% of providers delivering to international onshore students moved to fully online and nearly 90% moved at least some training or assessment online. Providers delivering to international offshore students had over 25% move to fully online and over 80% move at least some training or assessment online. The below charts represent the transitioning of delivery online for the 3 student bases.

The ESOS Review

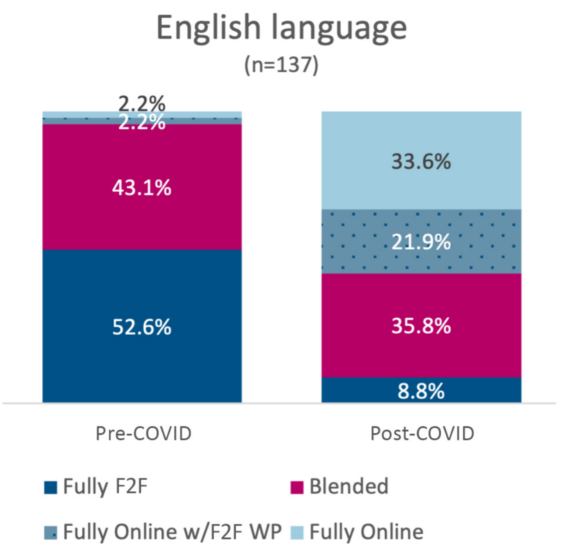
On 26 November 2021, the Australian Government released the Australian Strategy for International Education 2021–2030 and announced key initiatives supporting its implementation. As part of measures to ensure the regulatory and legislative framework is best placed to support delivery of the new Strategy, the Department of Education, Skills and Employment is undertaking a review of the Education Services for Overseas Students (ESOS) Act, including the National Code of Practice for Providers of Education and Training to Overseas Students 2018. The ESOS Review will examine how the ESOS regulatory framework can evolve to support Australia's international education sector to expand delivery of digital and blended modes of delivery and better drive diversification, while also continuing to protect Australia's international reputation for providing a quality education. Any further changes to the ESOS Act will be noted on DESE's website and through communications with ASQA.

Figure 11. Transitioned delivery online – domestic, international onshore and international offshore



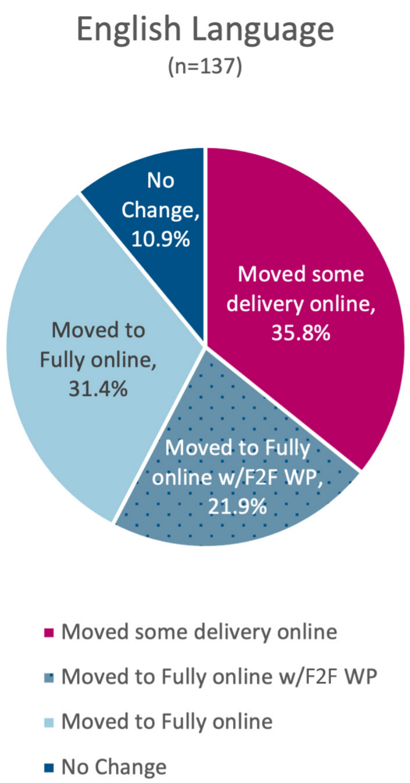
Figures 12 and 13 represent the pre-COVID-19 to post-COVID-19 differences for those providers that have identified they deliver ELICOS.

Figure 12. Pre-COVID-19 vs post-COVID-19 – English language



Note: Providers can deliver multiple types of education and training (VET, VET in school, English language) to students and delivery type categories (fully F2F, fully online, etc.) represent the delivery type to all students at a provider. Therefore, within the blended cohort, it cannot reliably be identified which delivery type was used for English language courses.

Figure 13. Transitioned delivery online – English language



Training packages

The COVID-19 pandemic has had a major impact on the delivery of most training packages. Figure 14 shows a significant increase to training packages being delivered online post-COVID-19.

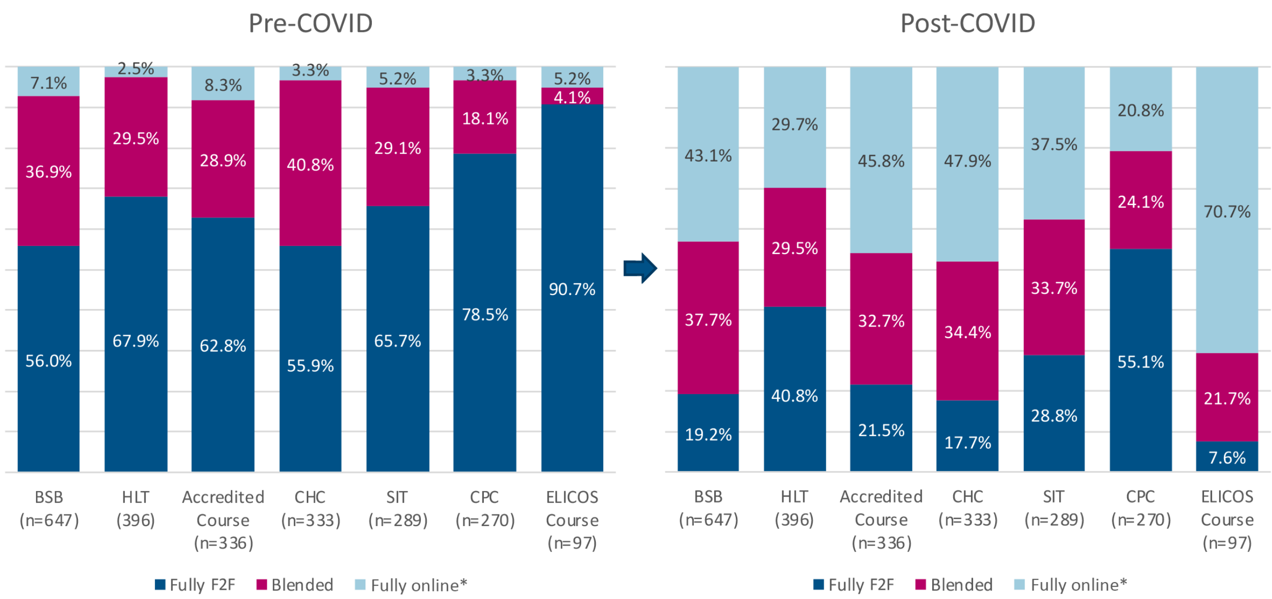
One of the most significant shifts to online learning was observed in relation to ELICOS courses. While ELICOS courses are technically not considered a training package, they are discussed in this section for ease of analysis of survey results.

Prior to COVID-19, ELICOS courses were predominantly delivered face-to-face. This delivery mode is guided by the National Code 2018 of the ESOS Act, which requires registered ESOS providers (which includes ELICOS providers) to only offer overseas students no more than one-third of their course online. However, during the pandemic temporary regulatory flexibility was introduced to allow ESOS providers to deliver training and assessment fully online.

In response to COVID-19, ELICOS courses went from 5% fully online* to 71% fully online* and from 9% with some components online (blended and fully online*) to 92% with some components online.

Within the top 7 training packages (including ELICOS) survey respondents were registered to deliver as at 1 March 2020, considerable numbers of respondents moved to delivering the training package either partially online or fully online in response to COVID-19. In particular, the Community Services (CHC) and Business Services (BSB) training packages marked the greatest increases respectively to their fully online* delivery pre-COVID-19 to post-COVID-19 (see Figure 14).

Figure 14. Pre-COVID-19 vs post-COVID-19 – Top 5 Training packages, accredited courses & ELICOS courses



Acronyms: BSB (Business Services), HLT (Health), CHC (Community Services), SIT (Tourism, Travel and Hospitality), CPC (Construction, Plumbing and Services), ELICOS (English Language Intensive Courses for Overseas Students). For a full list of training package acronyms, please see Figure 30.

*Note: 'Fully Online' refers to the proportion of providers who delivered the training package either 100% online, 100% online (excluding practical work placements)

From the nearly one-quarter of providers (285) that reported no training or assessment shifted in response to COVID-19 (excluding those that reported fully online or fully online w/F2F WP pre-COVID-19), just over half (145) suspended some training as a result of COVID-19.

Practical assessments and mandatory work placements

Some providers, whose (a) training included mandatory work placements and practical assessments, and (b) shifted some/part/all training online in response to COVID-19, were sometimes unable to support their completion. For example, for students of those providers, 5% of mandatory work placements and 22% of practical assessments were able to be partially completed online; with just 1% and 11% (respectively) fully completed online. Providers' responses indicate that 41% of mandatory work placements and 47% of practical assessments were delayed as a result of COVID-19 restrictions.

The training packages which were least likely to shift online in response to COVID-19 include Forest and Wood Products (FWP), Manufacturing (MSM), and Chemical, Hydrocarbons and Refining (PMA). These training packages were largely delivered face-to-face prior to COVID-19. This may indicate that these training packages were deemed not suitable for online delivery by the provider or were too difficult to shift to online delivery in response to COVID-19.

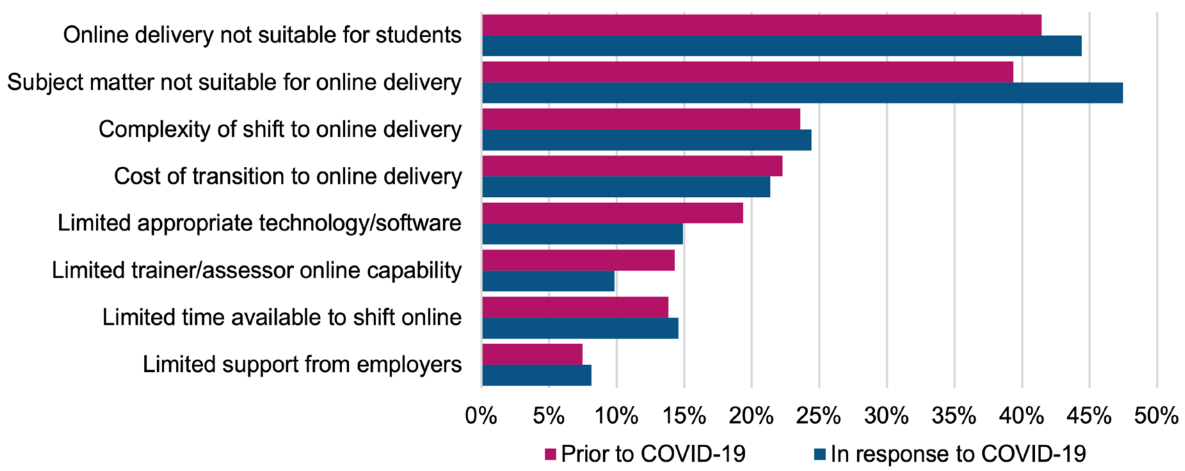
Barriers to shifting online

Prior to COVID-19, around half of providers delivered training and assessment fully face-to-face. For these providers, the reasons for not delivering online pre-COVID-19 were the same reasons given by providers who did not shift to online delivery in response to COVID-19, as shown in Figure 15. For example, for those providers who did not offer online delivery pre-COVID-19 and did not shift in response to COVID-19, key reasons given were that:

- online delivery is not suitable for students
- the subject matter is not suitable for online delivery.

These responses were similar across all provider sizes (by student numbers). The only notable difference was that the reason 'complexity of shift to online delivery' increased as the provider size increased.

Figure 15. Main reasons for not delivering online pre-COVID-19 and post-COVID-19



Providers who did not shift any training or assessment online in response to COVID-19 (remained fully F2F post-COVID-19) and who were most likely to report 'online delivery not suitable for students' as the main barrier preventing them from shifting online were delivering the training packages shown in Figure 16.

Figure 16. Top training packages of providers who remained fully F2F post-COVID-19 and nominated 'online delivery not suitable for students'

Training package	Online delivery not suitable for students	Number of providers who remained fully F2F post-COVID-19	Providers with training package on scope (survey population)
Hairdressing and Beauty Services (SHB)	44% (n=7)	16	67
Construction, Plumbing and Services (CPC)	42% (n=57)	135	270
Manufacturing and Engineering (MEM)	42% (n=14)	33	91
Business Services (BSB)	41% (n=47)	114	647
Manufacturing (MSM)	40% (n=29)	73	121

This juxtaposes the earlier finding that more broadly, both the BSB and CPC training packages reported a significant shift to training being delivered fully online in response to COVID-19. We do not have the evidence of what the reasons are for this. It may be indicative of providers' varying degrees of readiness to deliver these courses online during COVID-19. We will continue to analyse these results as part of the strategic review's final report.

Providers who did not shift any training or assessment online in response to COVID-19 (remained fully F2F post-COVID-19) who were most likely to report 'subject matter not suitable for online delivery' as the main barrier preventing them from shifting online, were delivering the training packages shown in Figure 17.

Figure 17. Training package 'subject matter not suitable for online delivery'

Training package	Subject matter not suitable for online delivery	Number of providers who remained fully F2F post-COVID-19	Providers with training package on scope (survey population)
Property Services (CPP)	45% (n=20)	44	129
Hairdressing and Beauty Services (SHB)	44% (n=7)	16	67
Resources and Infrastructure (RII)	43% (n=61)	142	223
Transport and Logistics (TLI)	42% (n=55)	131	226
Construction, Plumbing and Services (CPC)	41% (n=55)	135	270

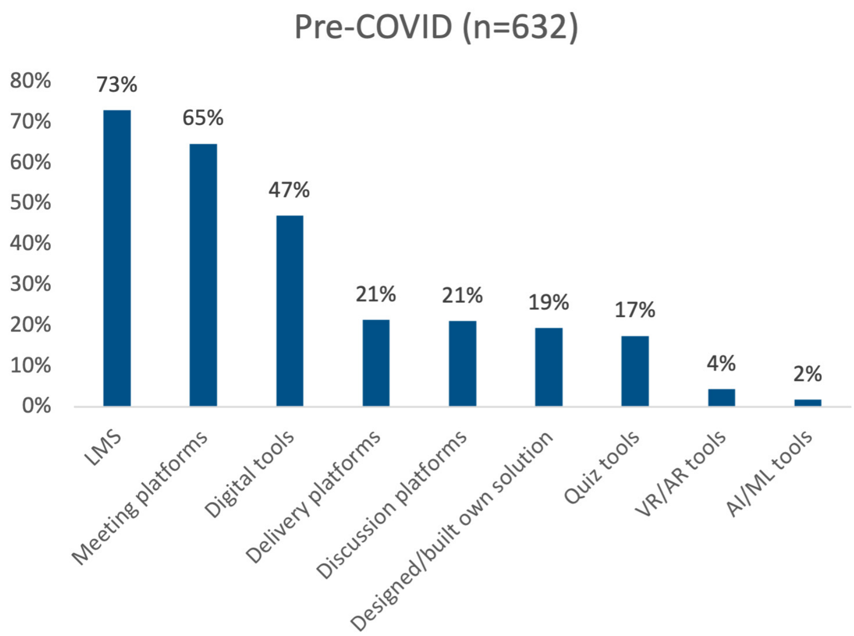
Interestingly, CPC appears as both a training package with a marked shift to delivering fully online, as well as being a training package common among providers who did not shift at all in response to COVID-19 (and who were likely to report 'online delivery not suitable for students' and 'subject matter not suitable for online delivery'). This may be indicative of providers' varying degrees of readiness to deliver these courses online during COVID-19. It may also be indicative of divergent views about the suitability of delivering the CPC training package online. We will continue to analyse these results as part of the strategic review's final report.

Please refer to Figure 30 in the appendix for a table showing changes reported across all training packages.

Technology and digital platforms

Prior to COVID-19, 632 providers reported they were using online delivery (to any extent). Of this group, as shown in Figure 18, almost three-quarters (73%) were using a learning management system (LMS), 65% were using a meeting platform such as Zoom or Teams, and approximately half were using digital tools such as PowerPoint. Few reported using digital tools for delivering highly interactive online learning, such as: quiz tools (17%), virtual or augmented reality (VR/AR) tools (4%), or artificial intelligence/machine learning (AI/ML) tools (2%).

Figure 18. Pre-COVID-19 technology and digital platforms



There were some marginal differences in the use of technology across providers of differing sizes prior to COVID-19. Large providers were slightly more likely to be using an LMS and a wider range of technologies than smaller providers. This may be explained by larger providers having access to more financial resources.

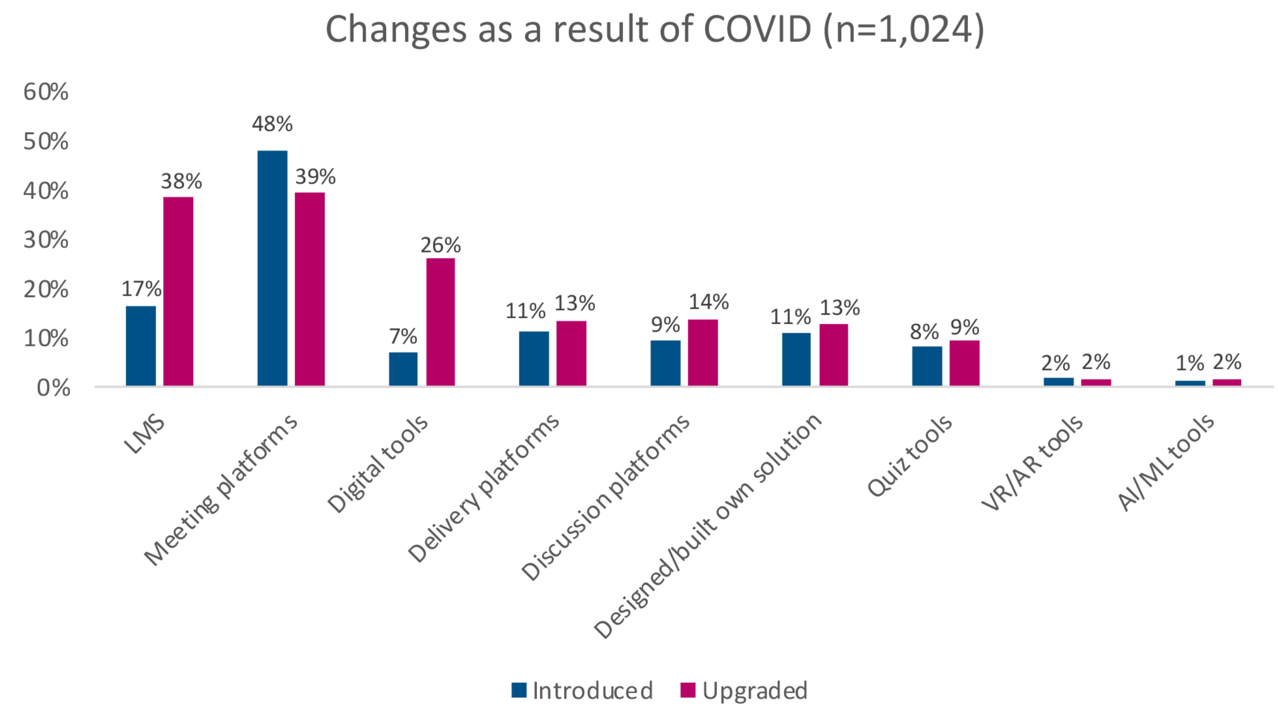
In response to COVID-19, there were 1,024 providers that reported that they delivered online training (to any extent). Of this group, as shown in Figure 19, the trends in the types of technologies being used are similar to the group that reported using online delivery methods pre-COVID-19.

Nearly 50% of this group of providers (n=1,024) introduced a meeting platform in response to COVID-19. This was possibly to ensure continuity of learning in response to conditions created by the pandemic. It may also have been one of the simplest technology changes a provider could make.

Only 8% of respondents acquired a digital quiz tool and less than 2% acquired a virtual or augmented reality (VR/AR) tool and just over 1% an artificial intelligence/machine learning (AI/ML) tool.

Irrespective of provider size, meeting platforms were the type of technology most likely to be acquired or upgraded by providers. This suggests meeting platforms were a minimum requirement for providers to continue operating during the pandemic.

Figure 19. Introduced and upgraded technologies post-COVID-19



Providers' views

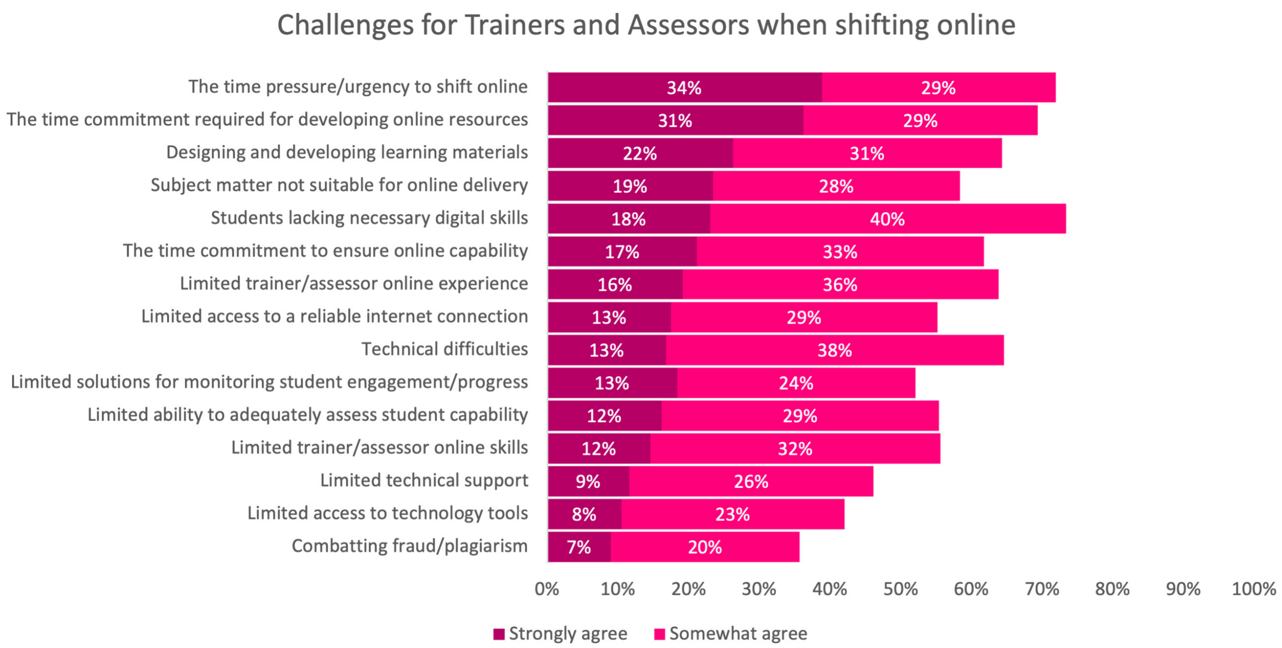
How trainers and assessors adapted

Overall, the survey results showed that providers perceived that trainers and assessors adapted well to the shift online. For example, of the 893 providers that reported they transitioned to online delivery (to any extent), 84% reported a view that their trainers/assessors adapted reasonably or very well. This positive response to the shift may have been helped by the fact that almost all respondents (93%) noted that their trainers/assessors received some level of training due to the shift online. This included training on software; on how to provide technical support; and on units of competency from the Trainer and Assessor (TAE) Skills Set.

Providers identified (Figure 20) that the top 2 challenges trainers and assessors faced in shifting online were 'the time pressure/urgency to shift online' (63% agreed), and 'the time commitment required for developing online resources' (60% agreed).

'Students lacking necessary digital skills' was also rated highly by providers as a challenge for trainers when shifting to online learning in response to COVID-19 (58%).

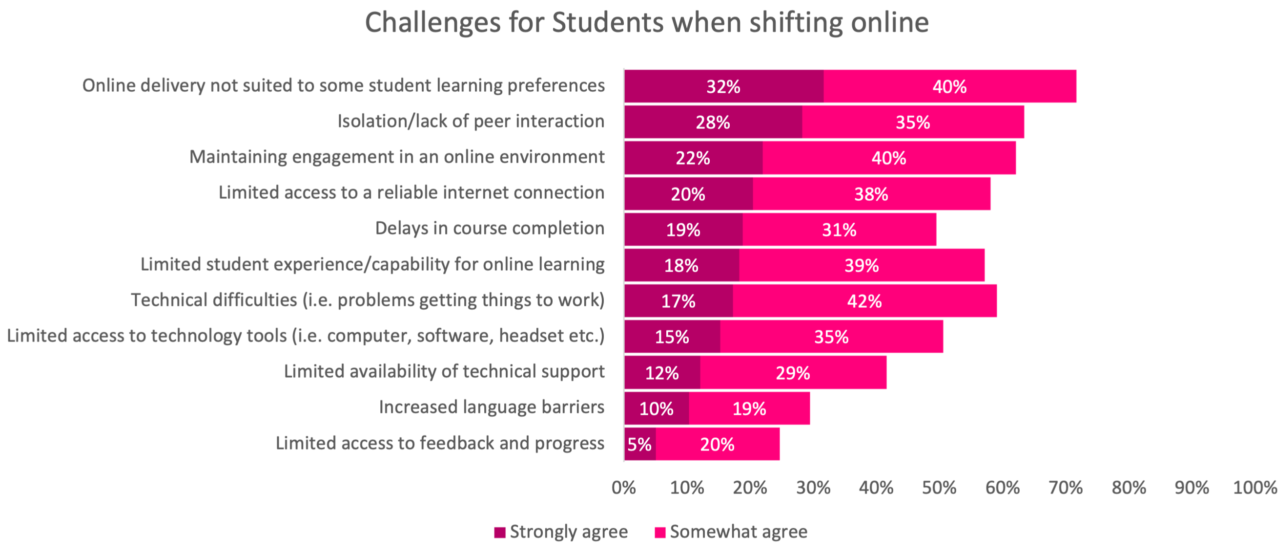
Figure 20. Providers' views of challenges for trainers and assessors when shifting online



Experiences of students

Almost three-quarters (71%) of respondents expressed the view that online delivery was not suitable for some student learning preferences. This was the most common challenge that providers reported students experienced with the shift to online learning in response to COVID-19. The other challenges commonly identified are shown in Figure 21.

Figure 21. Providers' views of challenges for students when shifting online



These results are from providers' perspectives, who largely reported that trainers and assessors responded well to the transition online. At the same time, research undertaken as part of this strategic review to understand student experiences of the shift online in response to COVID-19 (see Insights Paper 2), has included the observation that some trainers and assessors did not have sufficient skills to deliver content and learning online. This underscores the range of perspectives and experiences of the transition online.

This survey also found that providers delivering to international students were more likely to report challenges for their students such as 'increased language barriers' and 'isolation/lack of peer interaction' with the shift to online learning, relative to providers delivering to only domestic students.

In contrast, providers delivering purely to domestic students were more likely to report that 'limited access to a reliable internet connection', 'technical difficulties' and 'limited availability of technical support' were challenges for their students. Figure 22 summarises the proportion of providers who agreed or strongly agreed to each challenge listed.

Figure 22. Providers' views of challenges for students when shifting online, by international and domestic students*

Challenge	Domestic students	International students (include onshore and offshore)	Difference^#
Limited access to a reliable internet connection	62%	51%	11%
Technical difficulties (i.e. problems getting things to work)	62%	53%	8%
Limited availability of technical support	44%	36%	8%
Limited student experience/capability for online learning	59%	53%	7%
Limited access to technology tools (i.e. computer, software, headset etc.)	53%	46%	7%
Online delivery not suited to some student learning preferences	74%	68%	6%
Limited access to feedback and progress	25%	23%	2%
Delays in course completion	50%	48%	2%
Maintaining engagement in an online environment	62%	62%	1%
Isolation/lack of peer interaction	61%	69%	-8%
Increased language barriers	26%	37%	-11%

*International students include those who live onshore and offshore.

^There are rounding adjustments when calculating differences.

#Positive percent scores represent the sum of strongly agree and agree responses.

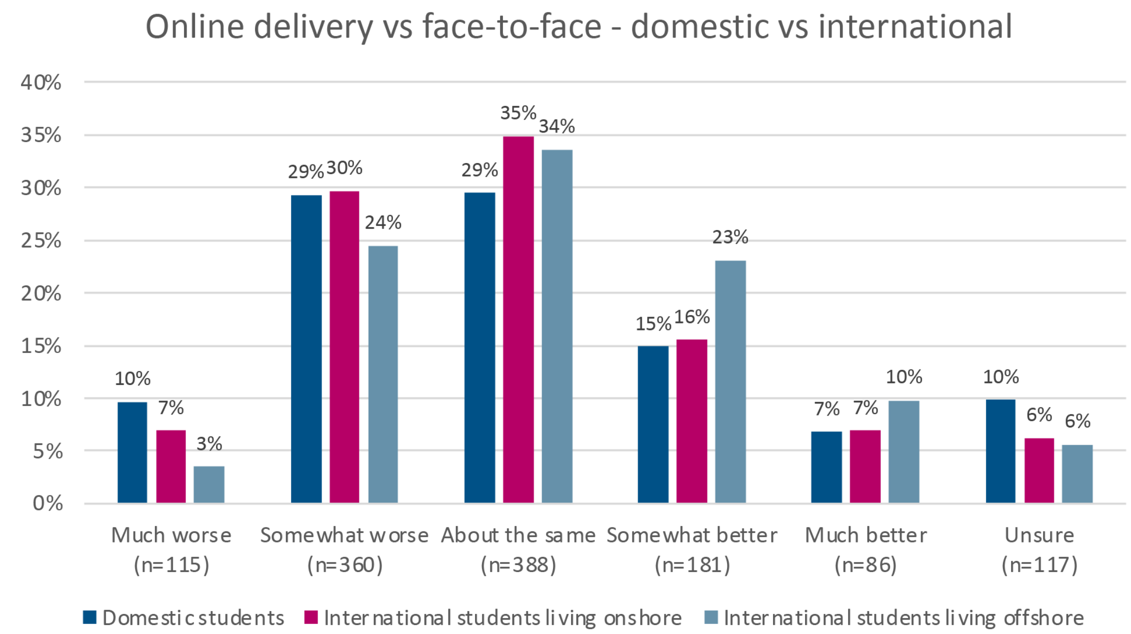
Online learning quality

Overall, a slightly larger proportion of providers believe that the quality of online delivery is not as good as face-to-face delivery. Specifically, the responses were that:

- 38% of providers believe the quality of online training is worse than face-to-face training
- 22% believe the quality is better
- 31% believe the quality is about the same
- 9% are unsure.

When comparing the results of providers that deliver to different student bases, there was a notably larger percentage (33%) of providers that delivered to international students living offshore that believed the quality of online training was better than face-to-face (Figure 23). This compared to 23% for international students living onshore and 22% for domestic. The temporary regulatory flexibility that enabled expansion of delivery of VET online to offshore international students may be part of the reason for this.

Figure 23. Quality of online delivery vs face-to-face – providers delivering to domestic and international students



Providers that reported transitioning to online delivery that believe the quality of training *declined* as a result, most commonly reported this as being due to:

- diminished student engagement
- a lack of face-to-face interaction
- reduced practical activity.

Providers that reported transitioning to online delivery and believe that the quality of training *improved* due to the shift online, noted that the increase in quality was due to:

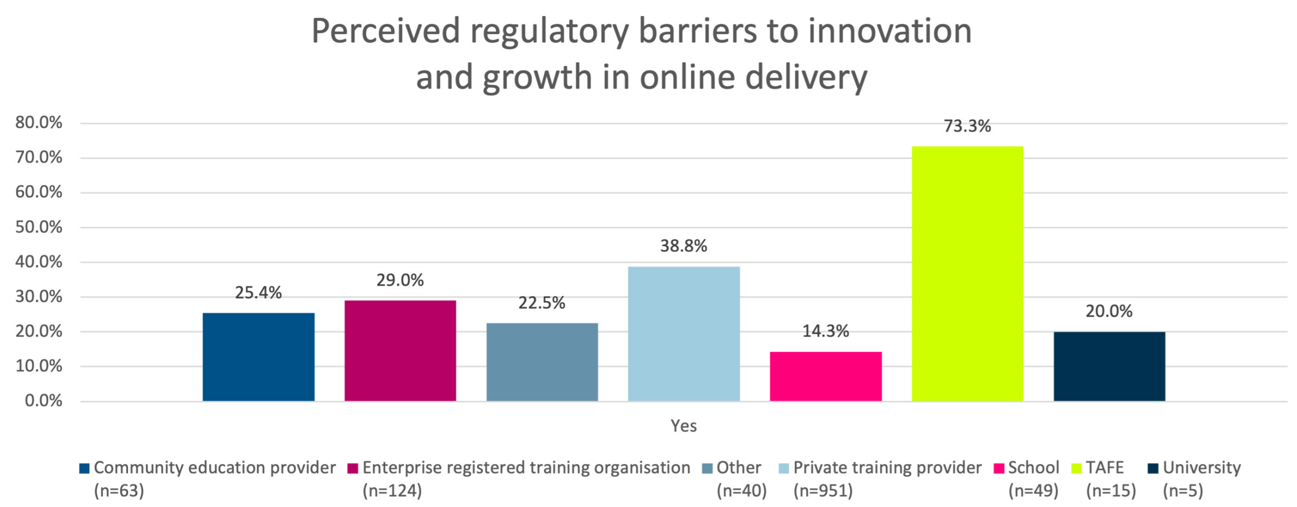
- increased flexibility of learning
- opportunity to change and update resources
- opportunity to review practice.

We will provide further analysis on this in the strategic review's final report.

Regulation and support

Almost two-thirds (64%) of respondents did not identify regulatory barriers that inhibit the innovation and growth of online delivery. The remaining third (36%) of providers that identified regulatory barriers varied by provider type. For example, almost three-quarters (73%) of TAFE providers (n=15) perceived there to be regulatory barriers inhibiting innovation and growth in online delivery, followed by 39% (from a sample size of 951) of private training providers. Figure 24 shows these results in more detail.

Figure 24. Perceived regulatory barriers to innovation and growth in online delivery



* Note: Please exercise caution when interpreting these results due to small sample sizes for university (n=5) and TAFE (n=15).

Providers listed a range of responses to regulatory barriers which they identified as inhibiting innovation and growth in online delivery, not all of which are regulatory in nature. Responses included:

- auditing inconsistencies
- visa and ESOS Act requirements
- lack of clear guidelines
- training package design
- practical assessment guidelines.

The vast majority of providers indicated they accessed a wide variety of information and support from ASQA to assist their organisation in responding to COVID-19. This included varying forms of guidance on shifting online and resumption planning, as well as accessing the ASQA Info Line. Only 13% of providers were dissatisfied with the information and support provided by ASQA in response to the shift online due to COVID-19. The additional resources providers suggested ASQA might consider developing to assist providers to deliver high quality online learning included:

- good practice examples of online training and assessment (63%)
- clear regulatory requirements/benchmarks for online training and assessment (60%)
- educational resources on providing online training and assessment (55%).

Only 6% of providers indicated that no additional support was needed. This suggests that there is a strong desire for additional support in this space.

Providers were asked what changes their organisation made to ensure they were still delivering quality training and assessment, and how they measured the impact of these changes. Many providers implemented a range of changes, including:

- technological upgrades
- enhanced student support services
- improved and additional online training resources
- upskilling staff
- delayed practical content
- reduced class sizes
- changed course design
- increased communication.

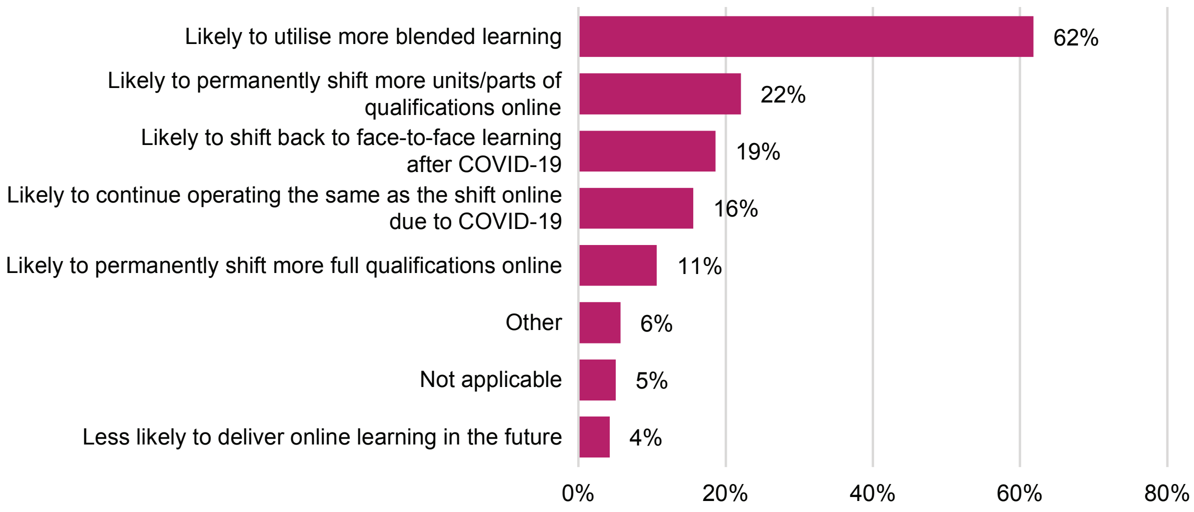
Providers stated that they evaluated the impact of the changes they implemented by using measures including feedback from students, trainers/assessors and industry; assessment and completion rates; and increasing trainer focus on monitoring student engagement.

Provider current state and plans for delivery (as at early 2021)

Approximately one year on from the initial shift to online learning due to COVID-19, more than a third of providers had partially shifted back to their pre-COVID-19 approach to training but were still offering an online option that they did not offer pre-COVID-19. Almost a quarter of providers continued to expand their online delivery since the initial shift online due to COVID-19. A quarter of providers fully reverted back to their pre-COVID-19 approach to training delivery. It is to be expected that these practices will not have remained static since the pandemic has continued into 2022.

As shown in Figure 25, a considerable proportion of providers (62%) who shifted to online learning in response to COVID-19, indicated that they were likely to employ more blended learning (a combination of digital learning and in-class, face-to-face learning) in the future. In addition, almost a quarter (22%) of providers stated they were likely to permanently shift more units/parts of qualifications online, and a further 11% were likely to permanently shift more full qualifications online.

Figure 25. Future plans for delivery approach



Summary

In broad terms, responses to the survey suggested 2 kinds of postures in relation to their views towards online learning. One was that online learning compromises VET quality. COVID-19 restrictions confronted providers with a difficult dilemma. Online learning was an option for maintaining the provision of training when students and industries were forced into lockdowns or were subject to extended public health restrictions such as social distancing rules. A clear view on the situation was articulated by a large number of respondents, that VET offers training with practical 'hands-on' skill development. This perspective included, by extension, the implication that it makes some assessment tasks either unable to be done online; or done in a way that compromises quality. A reasoned perspective among this group was that there might be digital means of quality delivery of practical training and assessment, but those technologies were likely to be too expensive, require too much lead time to implement and/or warrant new expertise, or would be disallowed by training package rules, industry and/or sector regulators. A common response to this sort of evaluation of conditions was to discontinue or delay operations or reduce the scale of provision to accommodate COVID-19 restrictions whilst continuing face-to-face delivery wherever possible. When considering transitioning or expanding delivery online, it is important to take into consideration the needs of each student cohort and the particular requirements of the training packages being offered.

The second posture was that the new conditions offered an opportunity to step back and review operations with a view to shifting to online delivery in a considered and integrated way. Providers in this category often felt compelled to move but did so in a way that was future focused. It was time when investment was considered a wise strategy that could position the provider for future changes. A range of approaches were described, and some benefits were presented that included improved quality of delivery. For a case-study that illustrates this approach to the rapid shift online, you can view the discussion shared by one provider from our most recent webinar, *Moving and staying online*, on their experiences of transitioning delivery of the infection skill set online.

In some instances, quality online learning can be delivered using very simple technologies. At the same time, it is to be expected that provider engagement in digital technologies will also continue to mature, given:

- online learning was part of the VET sector prior to COVID-19
- the pandemic has accelerated the uptake of online learning
- the social distancing requirements that drove the shift online continued across the world, including Australia, for a significant period after this survey.

To ensure quality VET when delivering online, it is important to consider the capabilities of both students and trainers and assessors in the application of digital technologies, and for students' experiences of engaging in a virtual learning environment to support their learning journey. It is also important for providers to self-assess how their practices as well as their systems and processes can best support learning outcomes and high-quality student experiences at each stage of the student journey.

Defining 'online learning'

ASQA draws on research by the National Centre for Vocational Research (NCVER 2019) to use a definition of online learning that describes it as training delivered primarily via the internet (ASQA website).

As part of the strategic review, we are considering identification of ways to bring greater clarity to terminology used in relation to online learning and delivery in the VET sector.

Online learning resources

The NCVER report, *The online delivery of VET during COVID-19:* part 1, investigates the extent to which RTOs shifted to online training delivery during the COVID-19 pandemic. It includes key findings from the jointly administered survey of providers that this Insights Paper 3 reports on. The NCVER report can be viewed here.

The research underpinning the previous insights paper in this series discusses student perspectives and experiences of the shift online in response to the pandemic. You can find the second paper and associated research report by EY Sweeney on our website.

Our latest webinar, *Moving and staying online*, explores the simple but practical ways providers have transitioned online. It includes a presentation from VET educator Dr Deniese Cox on how good teaching can happen within a range of online modes. These include fully live online; as well as automated, self-paced mode, repository style; and a range of modes in between. The right mode for you will depend on variables such as your topic at hand, the infrastructure and resources available, and the preferences and needs of your students. You can view the webinar and other publications associated with the strategic review of online learning in the VET sector on our website.

The next Insights Paper

We will continue to share findings through the Insights Papers series, with a commitment to building understanding and support for the continuous improvement in online learning.

Keep your eyes peeled for the fourth paper, focusing on online delivery and its impact on broadening choices available to VET students and the VET sector.

Please contact the team at StrategicReviews@asqa.gov.au if you have ideas to share!

Appendix

Figure 26. Survey respondents – by organisation type

	Survey size	Survey proportion
Private training provider	951	76%
Enterprise RTO	124	10%
Community education provider	63	5%
School	49	4%
Other	40	4%
TAFE	15	1%
University	5	0%
Total	**1,247**	

Note: Survey question: What best describes your organisation? Single response (n = 1,247)

Note: Proportions are calculated by column.

Figure 27. Survey respondents – by provider size

	Survey size	Survey proportion
None	62	5%
1 to 50	240	19%
51 to 200	342	27%
201 to 500	247	20%
501 to 1,000	153	12%
1,001 to 3,000	127	10%
3,001 to 6,000	34	3%
6,001 to 10,000	13	1%
More than 10,000	29	2%
Total	**1,247**	

Note: Survey question: Approximately how many unique student enrolments did your organisation have across all VET and ELICOS training programs you offered as at 1 March 2020? Single response (n = 1,247)

Note: Proportions are calculated by column.

Figure 28. Survey respondents – by principal place of business location

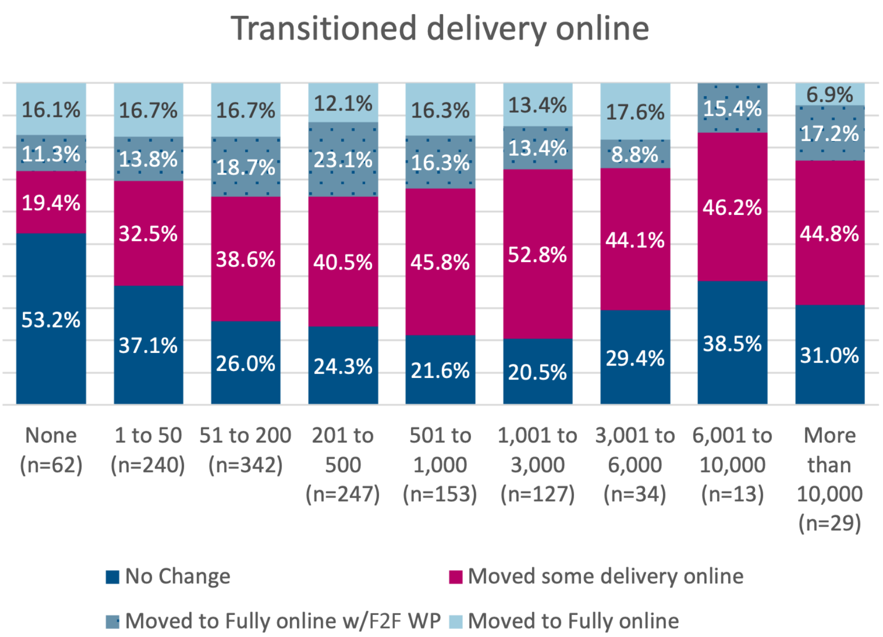
	Survey size	Survey proportion
Urban	909	73%
Regional	313	25%
Remote	24	2%
Total	**1,246***	

Note: Survey question: Is your principal place of business in an urban/regional/remote location? Single response (n = 1,246)

Note: *One provider responded that their principal place of business was overseas.

Note: Proportions are calculated by column.

Figure 29. Transitioned delivery online – by provider size



Note: Please exercise caution when interpreting these results due to small sample sizes for providers with 3,001 to 6,000 (n = 34), 6,001 to 10,000 (n = 13) and more than 10,000 (n = 29).

Note: Provider size is self-reported by survey respondents when asked how many unique student enrolments they had as at 1 March 2020.

Figure 30. Training package changes

Training package	Cost of transition to online delivery	Subject matter not suitable for online delivery	Limited appropriate technology/ software for online delivery	Online delivery not suitable for students	Limited trainer/ assessor online capability	Limited support from employers	Complexity of shift to online delivery	Limited time available to shift online	Regulatory barriers	Total (100% face-to-face post-COVID-19)
Business Services (BSB)	21%	29%	16%	41%	8%	8%	24%	13%	12%	114
Health (HLT)	21%	33%	14%	34%	7%	5%	21%	11%	12%	151
Community Services (CHC)	16%	27%	11%	34%	7%	9%	16%	5%	7%	56
Accredited Course	16%	28%	15%	39%	7%	1%	28%	9%	10%	67
Travel, Tourism and Hospitality (SIT)	25%	24%	17%	37%	11%	7%	29%	16%	12%	76
Construction, Plumbing and Services (CPC)	19%	41%	16%	42%	10%	7%	23%	13%	19%	135
Foundation Skills (FSK)	15%	18%	15%	33%	8%	3%	21%	5%	3%	39
Transport and Logistics (TLI)	18%	42%	11%	39%	8%	5%	21%	11%	23%	131
Information and Communications Technology (ICT)	12%	16%	12%	20%	8%	8%	16%	8%	0%	25
Resources and Infrastructure Industry (RII)	18%	43%	13%	38%	11%	6%	21%	12%	19%	142
Agriculture, Horticulture and Conservation (AHC)	16%	26%	16%	33%	12%	5%	23%	9%	12%	57
Property Services (CPP)	25%	45%	14%	36%	11%	7%	18%	18%	20%	44
Retail Services (SIR)	15%	15%	5%	35%	0%	5%	25%	10%	10%	20
Sport, Fitness and Recreation (SIS)	17%	9%	13%	13%	17%	4%	30%	17%	9%	23
Financial Services (FNS)	18%	27%	27%	36%	27%	0%	36%	9%	9%	11
Training and Education (TAE)	6%	22%	6%	11%	0%	6%	17%	11%	0%	18
Creative Arts and Culture (CUA)	9%	36%	9%	27%	9%	0%	27%	0%	9%	11
Manufacturing and Engineering (MEM)	18%	36%	15%	42%	12%	6%	27%	12%	6%	33
Public Safety (PUA)	17%	25%	11%	27%	8%	6%	19%	13%	11%	63
Manufacturing (MSM)	23%	36%	15%	40%	11%	8%	22%	14%	14%	73
Transmission, Distribution and Rail (UET)	13%	31%	6%	31%	5%	2%	18%	5%	6%	62
Electrotechnology (UEE)	7%	33%	7%	33%	0%	0%	13%	0%	13%	15
Hairdressing and Beauty Services (SHB)	0%	44%	6%	44%	13%	0%	13%	6%	0%	16
Automotive Retail, Service and Repair (AUR)	0%	14%	5%	38%	0%	10%	5%	0%	5%	21
Aviation Training Package (AVI)	7%	29%	0%	29%	0%	0%	14%	7%	14%	14
Forest and Wood Products (FWP)	22%	34%	22%	34%	19%	6%	25%	13%	6%	32
Maritime (MAR)	17%	17%	8%	8%	8%	0%	25%	17%	0%	12
Chemical, Hydrocarbons and Refining (PMA)	22%	30%	4%	33%	7%	11%	11%	7%	4%	27
Generation Sector (UEP)	9%	18%	0%	18%	0%	0%	9%	9%	0%	11