The Australian higher education sector operates within a complex landscape, driven and impacted by both domestic and global factors.

While much is written about the public universities and the TAFE sector in Australia, to date, reporting of the private segment of the market has been sparse and incomplete. The Private Higher Education Series seeks to redress this imbalance.

- The Series provides a useful synthesis of information and offers new insights, including:
  - The dynamics, profile and opportunities in the private higher education market;
  - The legislative and regulatory environment;
  - Market forecasts for the higher education sector; and
  - Market analysis by course offerings and discipline areas that dominate the private higher education sector.

Our first report – Private Higher Education in Australia 2018 – is now available.

Who should buy this report?

This Report is designed for those interested in private higher education, in particular:
- Prospective buyers or entrants in the higher education system;
- Higher Education Board Members and Senior Executives seeking an authoritative resource;
- Directors of compliance or quality assurance within higher education providers; or
- Those wanting to learn more about the private Australian higher education sector.

Sample from Report: Figure 20 – Private higher education: Total student EFTSL by provider type, 2012 – 2016

Who should buy this report?

About the Private Higher Education Series

The Australian higher education sector operates within a complex landscape, driven and impacted by both domestic and global factors.

While much is written about the public universities and the TAFE sector in Australia, to date, reporting of the private segment of the market has been sparse and incomplete. The Private Higher Education Series seeks to redress this imbalance.

- The Series provides a useful synthesis of information and offers new insights, including:
  - The dynamics, profile and opportunities in the private higher education market;
  - The legislative and regulatory higher education environment regulatory environment;
  - Market forecasts for the higher education sector; and
  - Market analysis by course offerings and discipline areas that dominate the private higher education sector.

Our first report – Private Higher Education in Australia 2018 – is now available.

Who should buy this report?

About this report

This Report provides a foundational overview and analysis of private higher education in Australia. It is designed to be a building block report for future reports in this Series and will help you answer the following questions:
- What is the market size and growth rate in terms of students and revenues for private HE, in total and for key segments?
- What are the main price relativities between private HE and the broader market?
- How many and which private providers are poised for self-accrediting authority and/or university status?
- What are the key market factors driving the broader market?
- What are the major regulatory frameworks that apply to HE in Australia, and how might these operate as constraints on the business?
- What is the profile of existing players in private HE in terms of regulatory approvals, scale and scope of operations, and geographic location?
- Which private providers are on the list of registered entities and which of those have CSP places; FEE-HELP, and/or self-accrediting authority; and
- What are some of the key developments and opportunities in private HE?

CLICK HERE TO SEE THE REPORT’S TABLE OF CONTENTS AND TABLE OF TABLES & FIGURES
Table of Contents

ABOUT US 2
ABOUT THE HIGHER EDUCATION SERIES 3
LIST OF TABLES 6
LIST OF FIGURES 7
PREFACE 8
I. EXECUTIVE SUMMARY 9
II. THE HIGHER EDUCATION MARKET 11
  1. Equivalent Full-Time Student Load 2012 – 2016 11
  2. Student-related revenue 13
III. HIGHER EDUCATION MARKET FACTORS 15
  1. Australian population growth 15
  2. Higher education participation and attainment rates 16
  3. Labour market trends 17
  4. Immigration trends and policies 17
IV. HIGHER EDUCATION LEGISLATION AND REGULATION 21
  1. Tertiary Education Quality and Standards Agency Act 2011 21
  2. Higher Education Standards Framework 22
  3. Australian Qualifications Framework 23
  5. ESOS Framework 25
V. PUBLIC HIGHER EDUCATION 28
  1. Market participants 28
  2. Market size 28
VI. PRIVATE HIGHER EDUCATION MARKET LANDSCAPE 31
  1. CSP allocation 31
  2. FEE-HELP approval 31
  3. CRICOS registration 32
  4. Links to vocational education 33
  5. Self-accrediting authority 34
  6. Scale of operation 34
  7. Geographical location 35
  8. Length of TEQSA registration 36
VII. PRIVATE HIGHER EDUCATION MARKET SIZE 38
  1. Equivalent Full-Time Student Load 2012 – 2016 38
  2. Student-related revenue 2012 – 2016 39
  3. Average pricing for iHEPs 40
VIII. PRIVATE UNIVERSITIES 42
  1. Equivalent Full-Time Student Load 2012 – 2016 42
  2. Student-related revenue 2012 – 2016 43
  3. Earnings per HEPU 44
IX. PRIVATE FOR-PROFIT IHEPS 46
  1. Equivalent Full-Time Student Load 2012 – 2016 46
  2. Student-related revenue 2012 – 2016 47
X. PRIVATE NOT-FOR-PROFIT IHEPS 48
  1. Equivalent Full-Time Student Load 2012 – 2016 48
  2. Student-related revenue 2012 – 2016 49
XI. MARKET CONSTRAINTS 48
  1. Regulatory Environment 48
XII. SECTOR DEVELOPMENTS AND OPPORTUNITIES 51
  1. Digital Education 51
  2. Offshore and Transnational Education 51
  3. Continuing and Professional Education 53
  4. The Path to Becoming a University 53
XIII. NOTES ABOUT THE DATA 57
XIV. FURTHER SOURCES AND CONTACTS 57
  1. Department of Education and Training 57
  2. Tertiary Education Quality and Standards Agency 57
  3. Council of Private Higher Education 57
  4. Australian Council for Private Education and Training 57
XV. REFERENCES 58
APPENDIX A: LIST OF PUBLIC UNIVERSITIES IN AUSTRALIA 59
APPENDIX B: LIST OF TAFES WITH HIGHER EDUCATION REGISTRATION 61
APPENDIX C: LIST OF PRIVATE HIGHER EDUCATION PROVIDERS IN AUSTRALIA 62
APPENDIX D: LIST OF PRIVATE HEPS WITH CSP PLACES 66
APPENDIX E: LIST OF IHEPS WITH SAA 67
APPENDIX F: GLOSSARY 68
Wells Advisory comprises a team of consultants and associates who have extensive, senior experience in higher education institutions, as well as in the organisations that govern them. Our team works closely with a range of clients across the sector to solve strategic, complex and often sensitive issues.

We have extensive engagement with both private higher education providers and public universities. We liaise with government, peak bodies, professional accreditation authorities and higher education leaders as part of our work across the higher education sector.

wellsadvisory.com.au

Linked In

Our first report – Private Higher Education in Australia 2018 – is now available.

CLICK HERE TO PURCHASE

Please note this report is sold subject to copyright and usage restrictions.

Coming soon:
- Private Higher Education Market Forecast Report 2018
- Private Higher Education Business Colleges
- Private Higher Education Creative/Arts Colleges
- Private Higher Education Health Colleges