



UTS Insearch

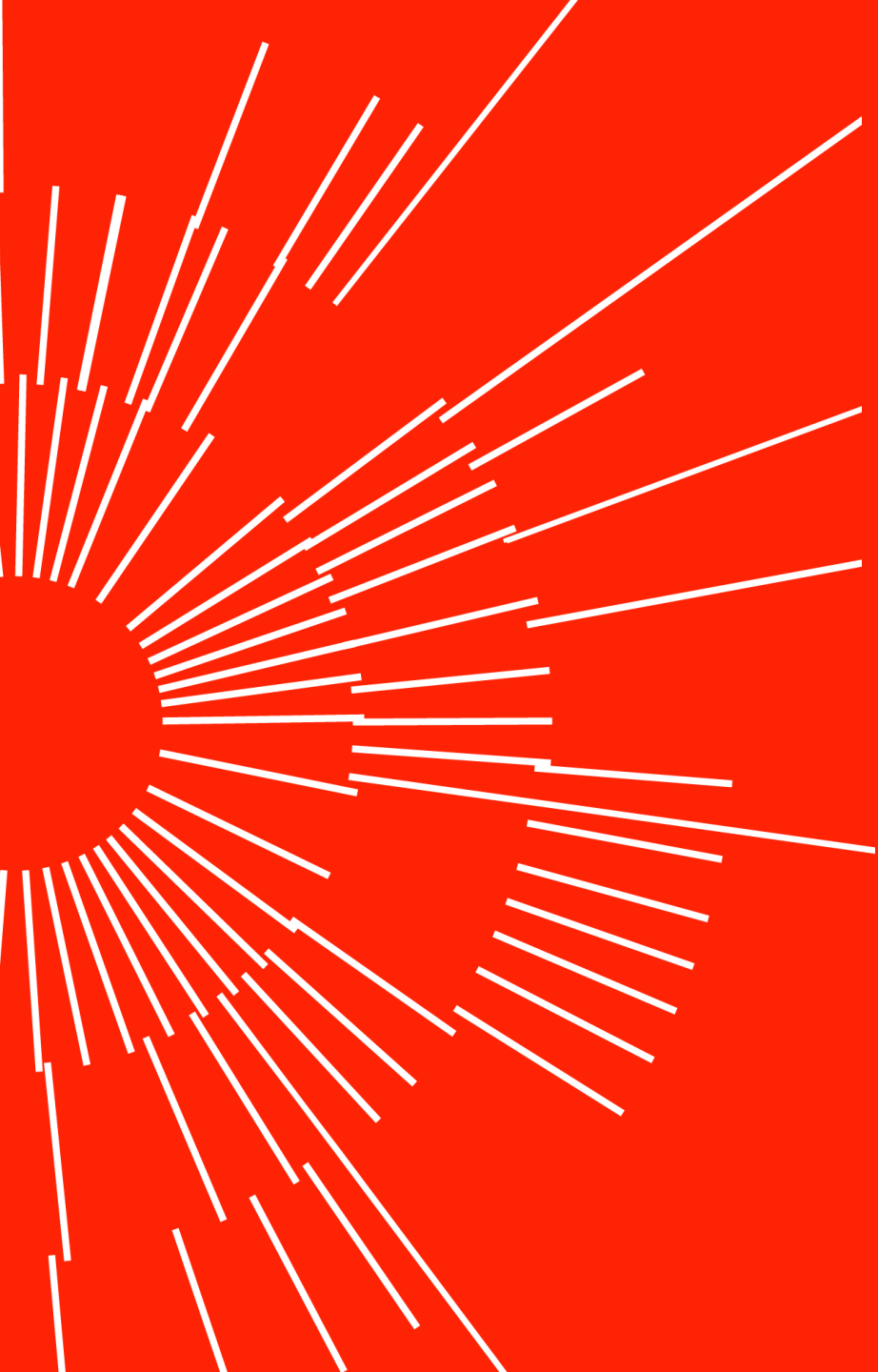
UNIVERSITY OF TECHNOLOGY SYDNEY

Pathways or hidden labyrinth

What does the data really say about pathway programs?

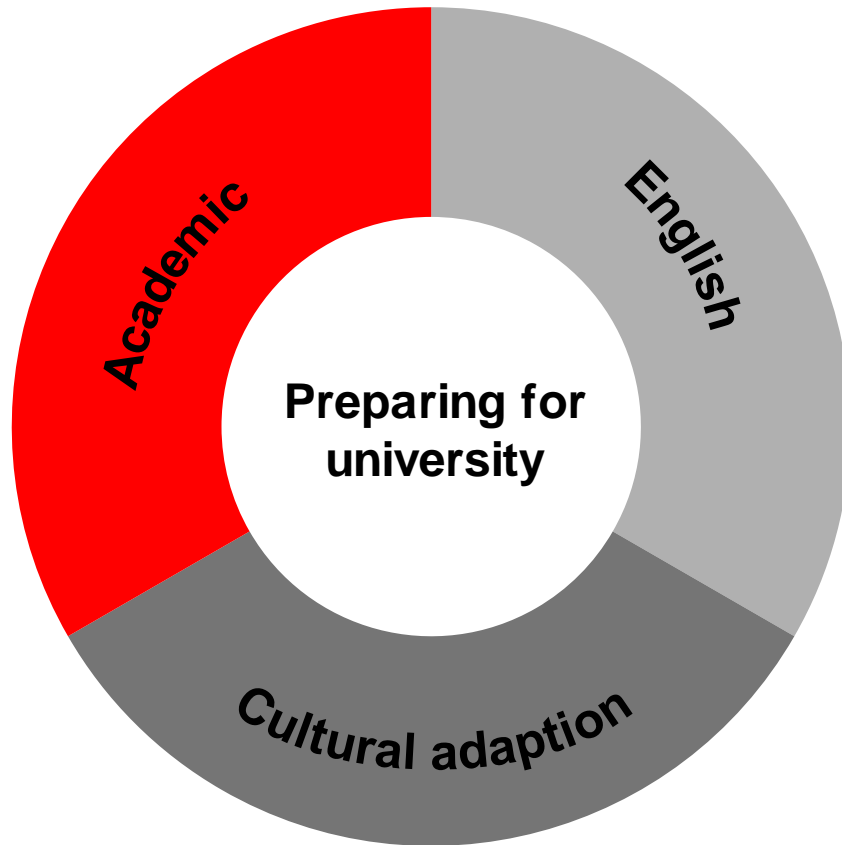
Dr Phillip Allen
Market Intelligence & Data Analytics
UTS Insearch





Why Pathways matter
How to measure?
Size of pathways
Impact on Higher Ed.
Five questions

Pathway programs

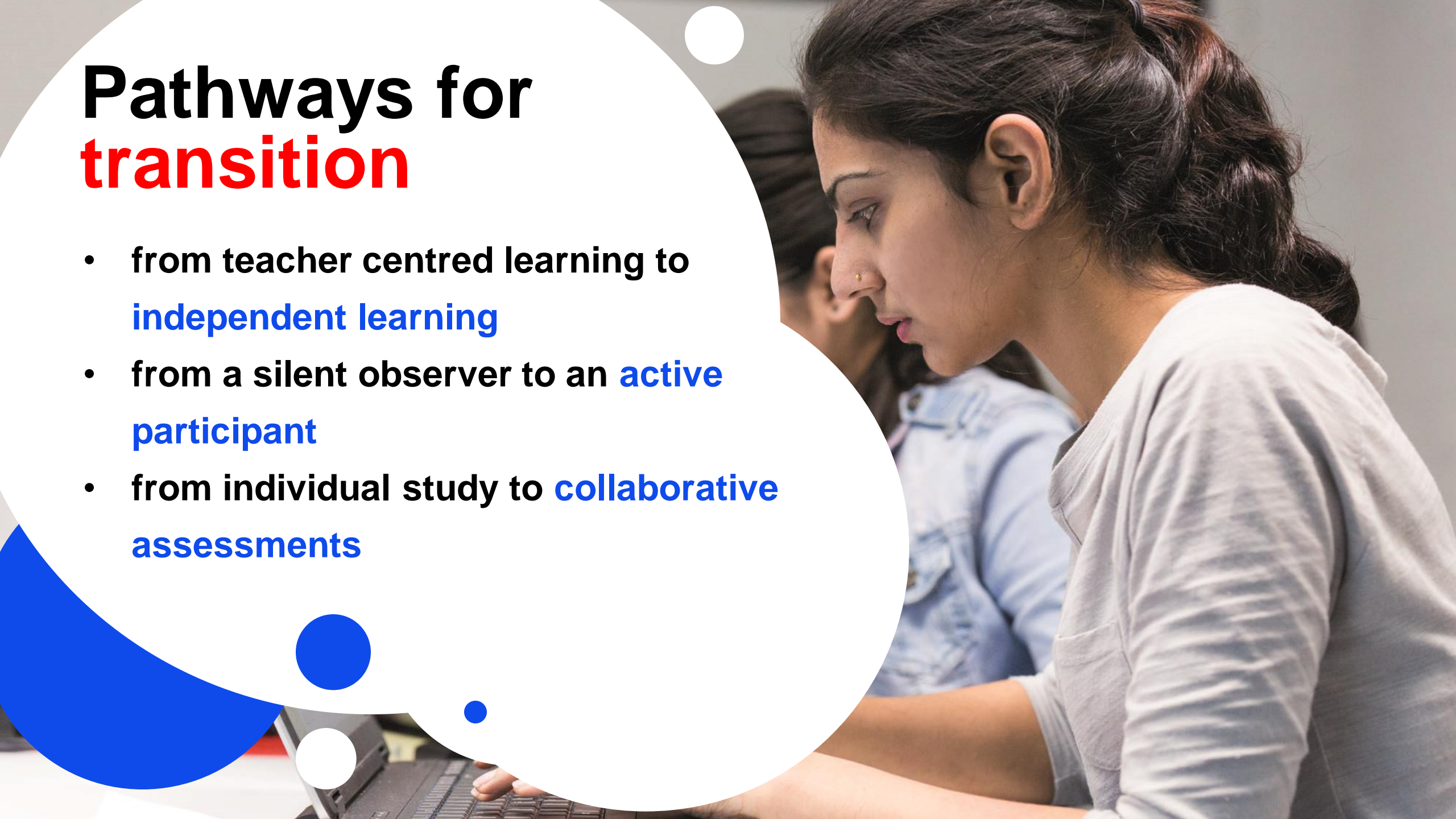


Courses that combine academic content with English language, cultural adaptation and general study skills to provide an assured progression to higher education.

- **Foundation**
- **Pre-Bachelors**
- **Diploma &**
- **Pre-Masters**

Pathways for **transition**

- from teacher centred learning to **independent learning**
- from a silent observer to an **active participant**
- from individual study to **collaborative assessments**



Let's compare



SCHOOL

Teacher directed

Classroom based

Timetable is fixed and student hours are strict



PATHWAY

Teachers as a guide

Student centred learning

Focus is on developing skills for independent learning

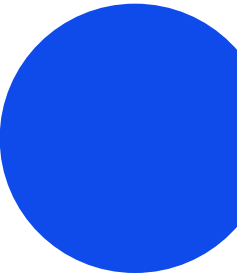
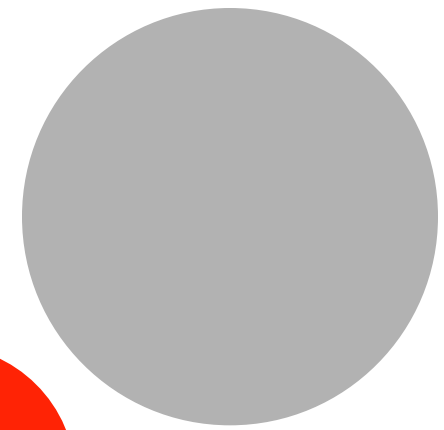


UNIVERSITY

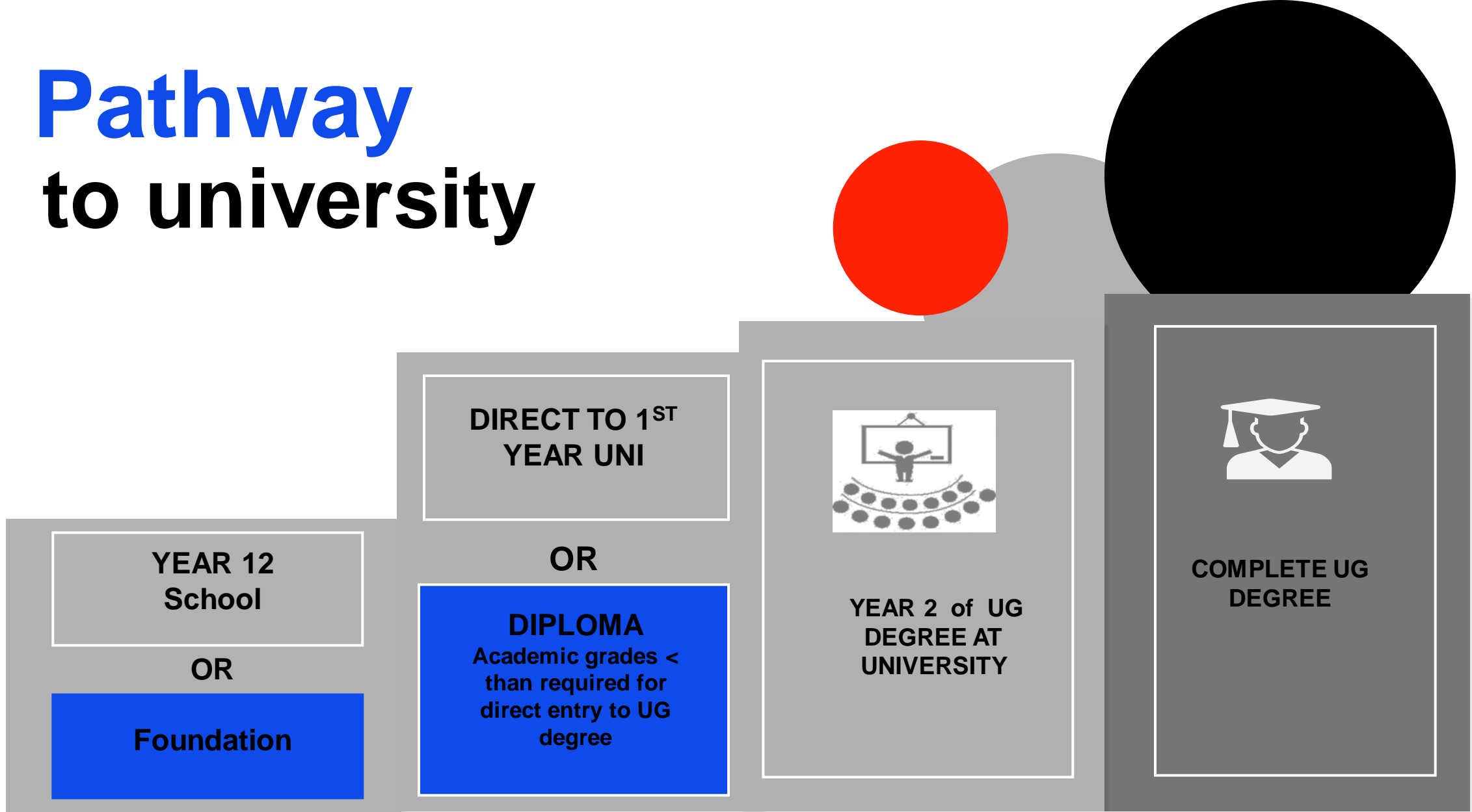
Lecturer

Self directed learning

Lecturers do not check required reading or remind students to complete homework



Pathway to university



YEAR 12

YEAR 1

YEAR 2

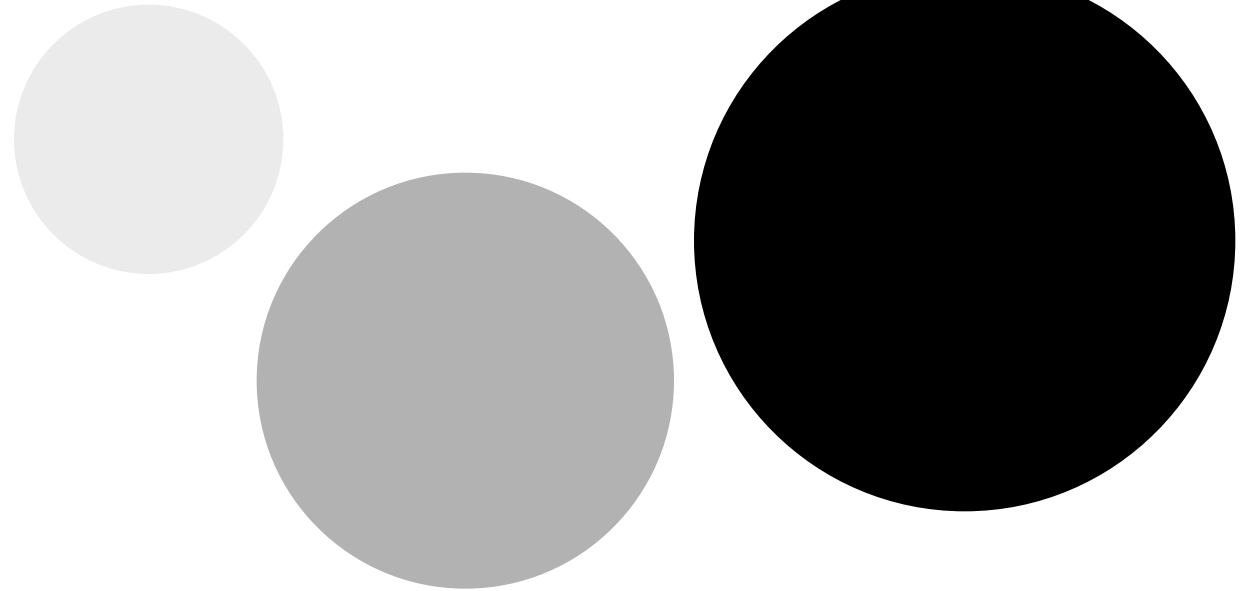
Australian Education System



Risk factors

first year

Developing a sense of belonging



Students feel that teaching staff not interested in their progress

No social networks at university

Working more than 25 hours per week

Students feel staff aren't available to discuss their work

Poor attendance

Pathways matter to Students

Completion
rates



70-80%

6 out of 10
Year 1

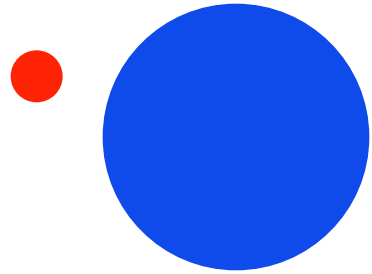


60%

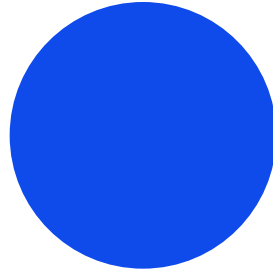
- Assured progression
- Easy to understand framework
- Additional support
- Developing skills for independent learning




Pathways matter to Sector



Distinctly Australian advantage linked to the quality of Australian education and access to markets



Early indicator of changing demand or student preferences



How to measure?



- Pathways are hidden in the available data
 - Commencements
 - Enrolments
 - Visa grants

Double counting

UNDERSTANDING THE DATA
Enrolments, Commencements and Student Numbers

Overview
There is often confusion surrounding the number of international student commencements, international student enrolments, and international students studying in Australia.

The Provider Registration and International Students Management System (PRISMS) international student enrolment and commencement data are sometimes thought to be the same as international student numbers. However, these data do not directly correlate to the number of international students in Australia or the number of international student visas issued. This is because each student can commence studying and be enrolled in more than one course of study at the same time and consequently be represented in the PRISMS data several times.

Enrolments vs Commencements
The following hypothetical example illustrates the differences between student numbers, commencements and enrolments.

An international student comes to Australia to study, progressing through and between different education sectors during a four-year period.

In the first year, the student commences an English Language Intensive Courses for Overseas Students (ELICOS) course and commences school, completing both within the first year. The student would be counted as a commencement and an enrolment in both sectors (ELICOS and schools).



In the second year, the student commences a Vocational Education and Training (VET) course and a second ELICOS course. Again, the student would be counted as a commencement and an enrolment in both sectors (VET and ELICOS).

In the third year, the student completes the VET course and commences studying a higher education course. Towards the end of the third year, the student commences a third ELICOS course while studying the higher education course. The student would count as a commencement in both the ELICOS and higher education sectors, and as an enrolment in the VET, ELICOS and higher education sectors.

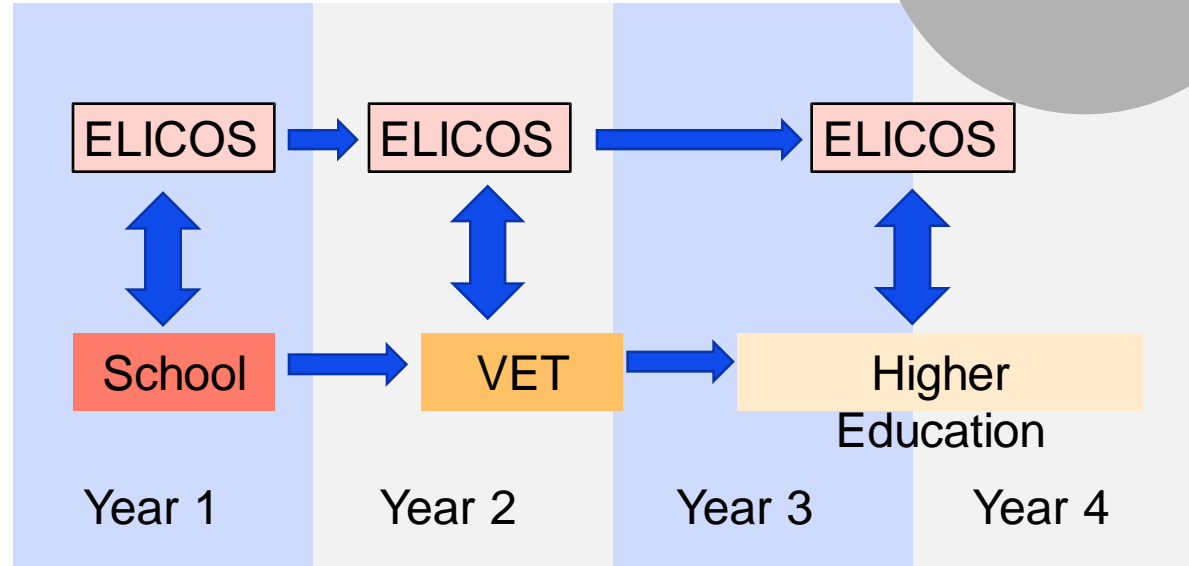
In the fourth year, the student completes the third ELICOS course, and completes the higher education course. The student would be counted as an enrolment in each of these sectors, but not as a commencement, as the student did not commence these courses in the fourth year.

During the four years, this single student would be counted as a commencement six times and an enrolment nine times.

For more information, contact mip@ustrade.gov.au

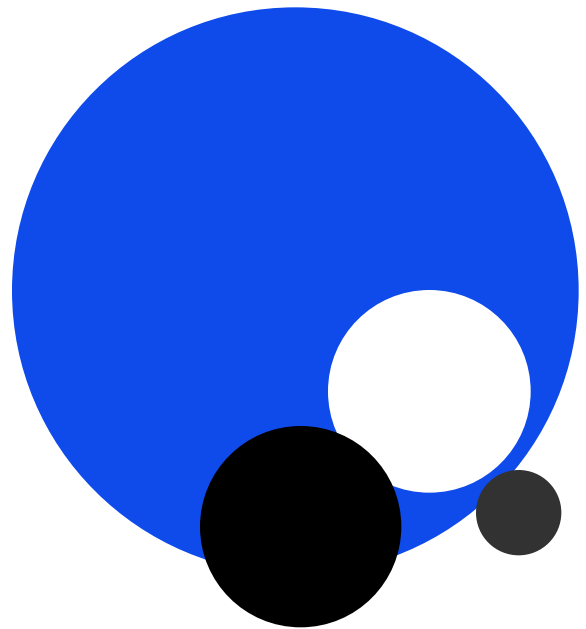
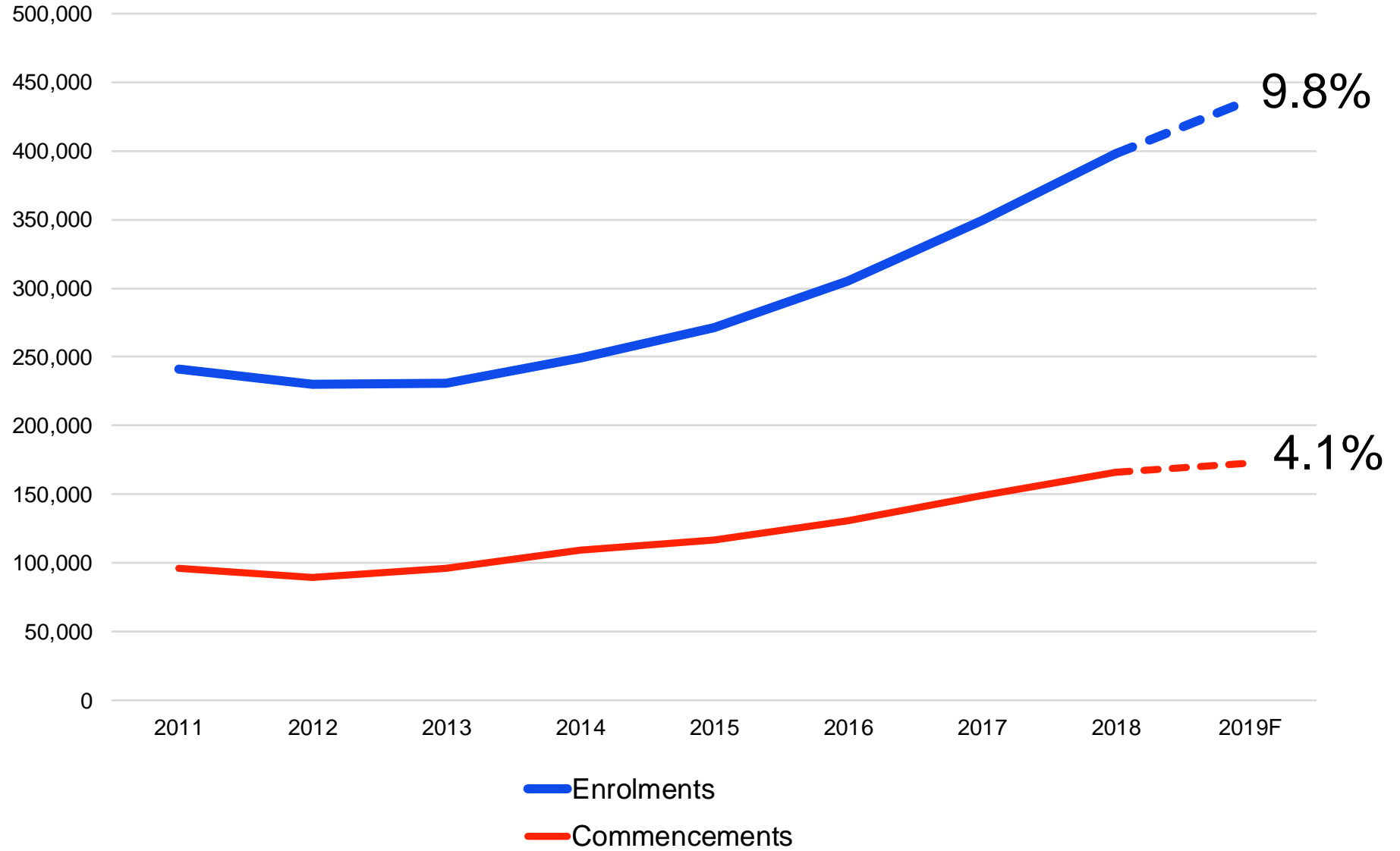
 

16 June 2014

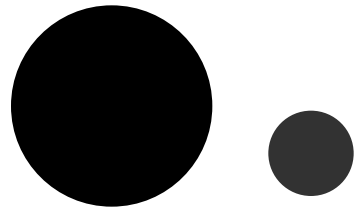
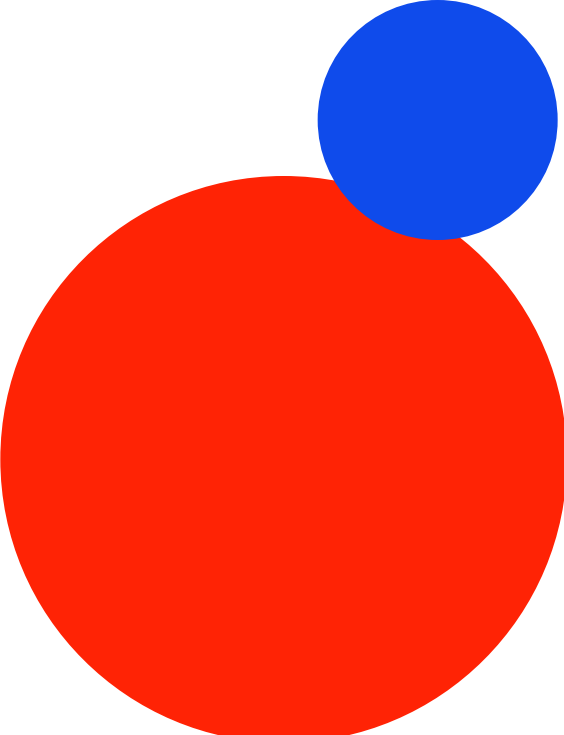
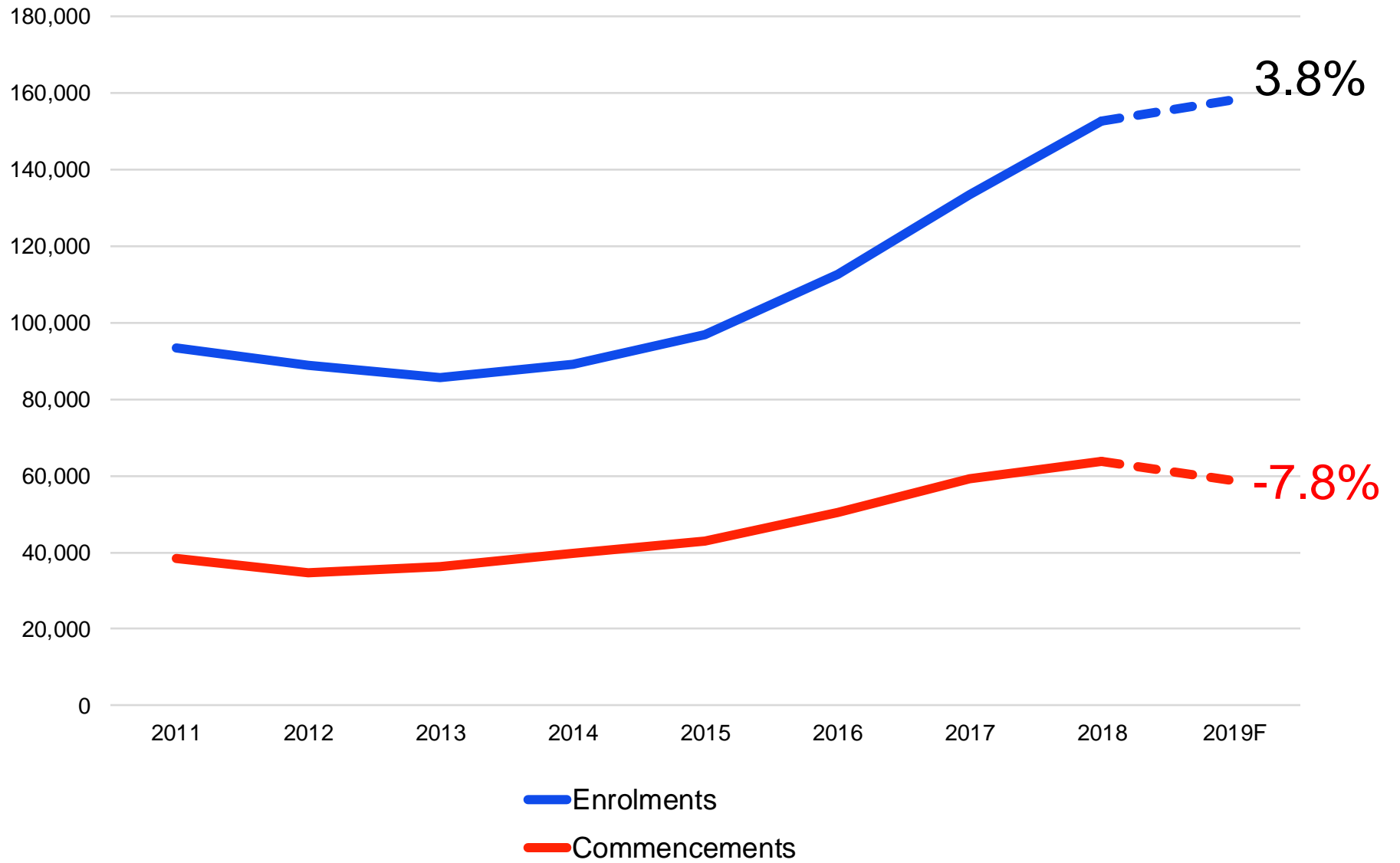


**Six commencements and
Nine enrolments**

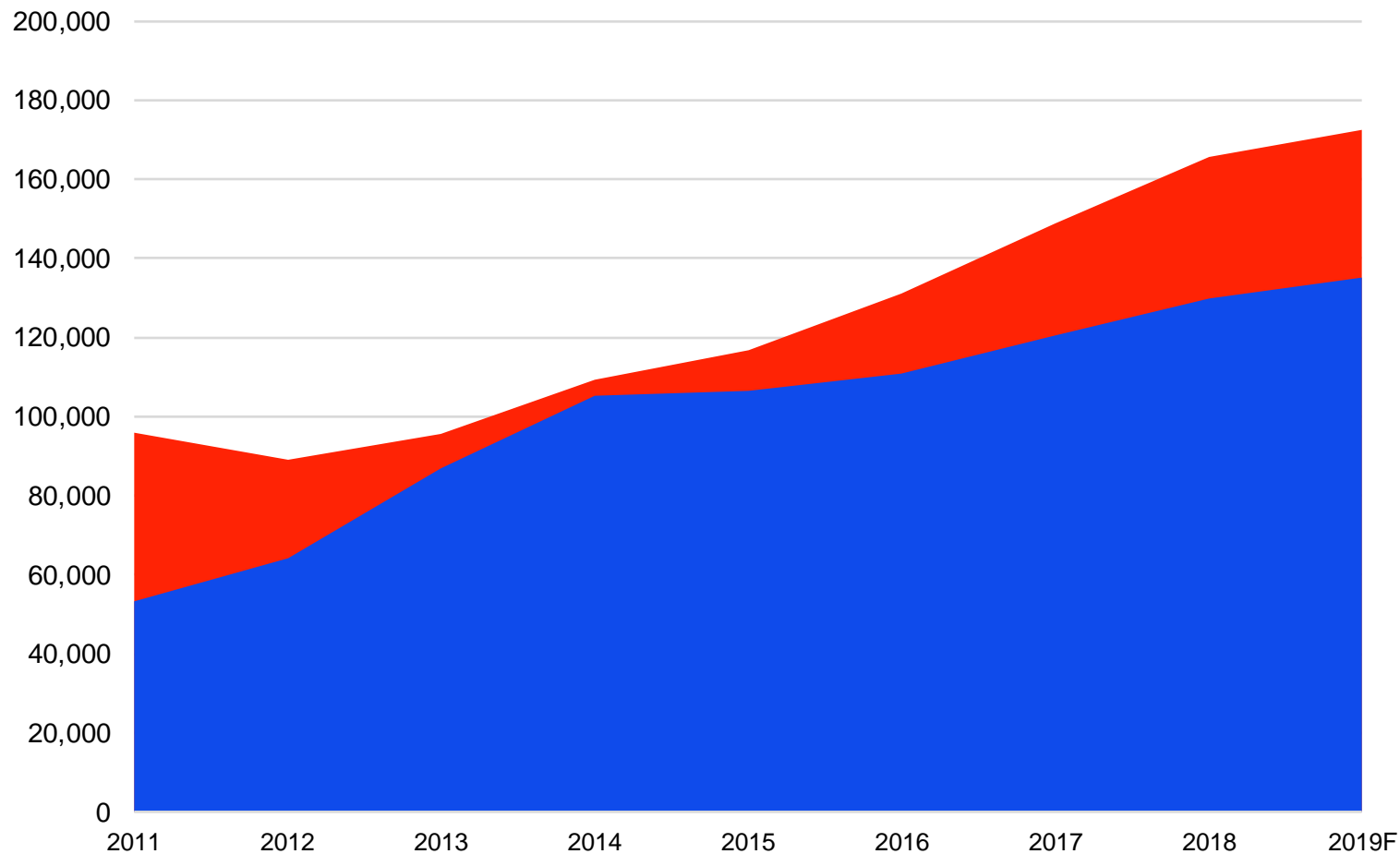
Higher Education Enrolments & Commencements



Chinese HE Education Enrolments & Commencements

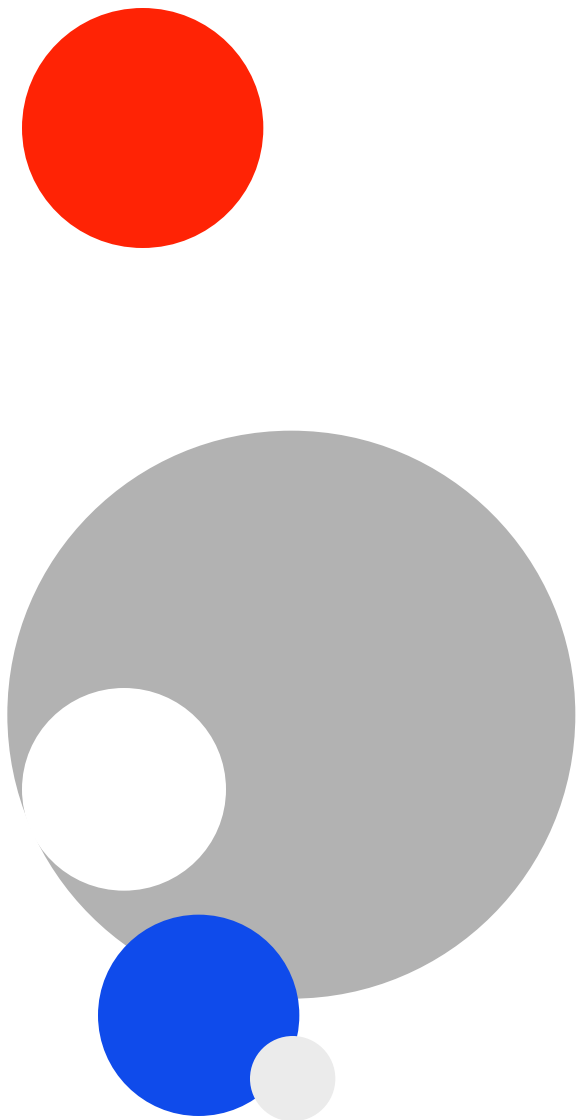


Commencements & Offshore Visa Applications



■ Commencements

■ Visa Applications



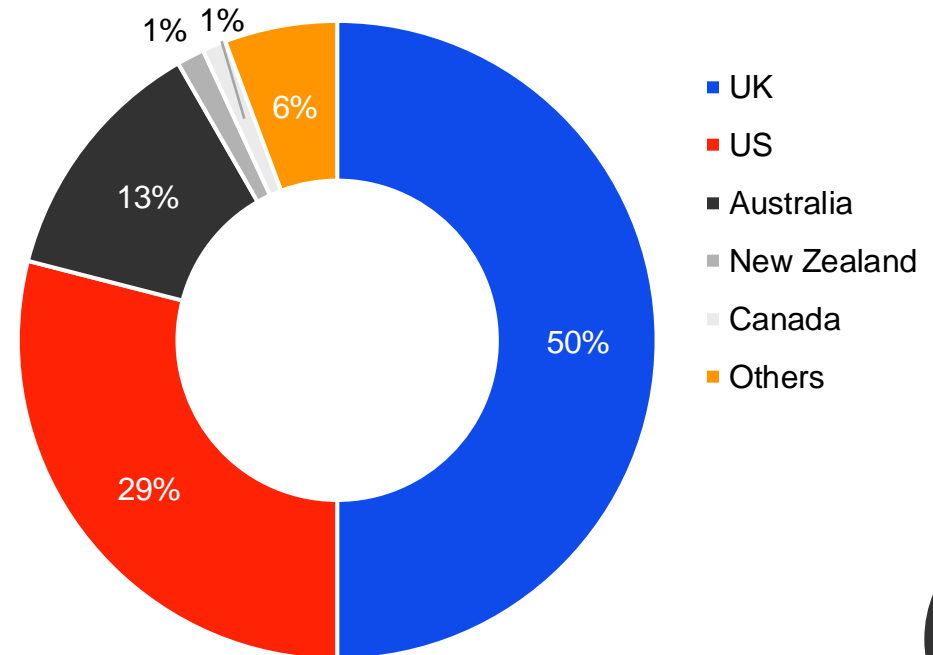
Size of Pathways



- Globally
- In Australia

Global size of **2,275 pathway programs** US\$1.4 billion per year

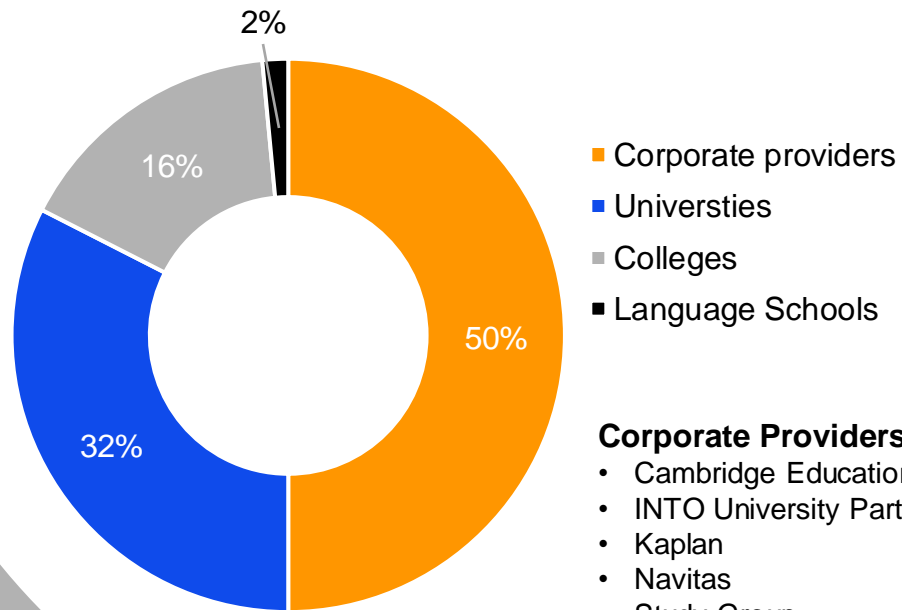
Pathway Programs Market share by Destination Country



Market share by provider type, Sep 2016
Source: StudyPortals/Cambridge English

Provider Type

Pathway Programs Market share by Provider Type



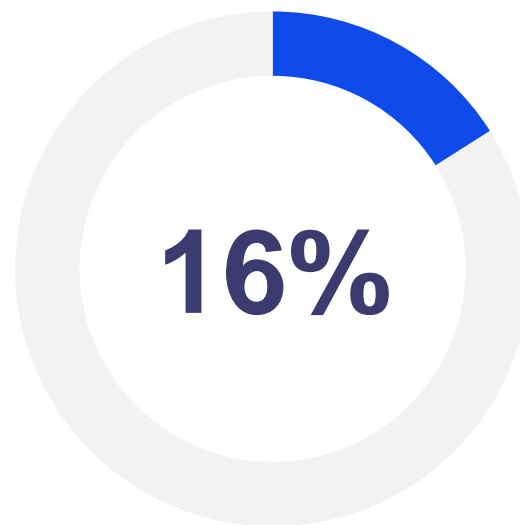
Corporate Providers

- Cambridge Education Group
- INTO University Partnerships
- Kaplan
- Navitas
- Study Group

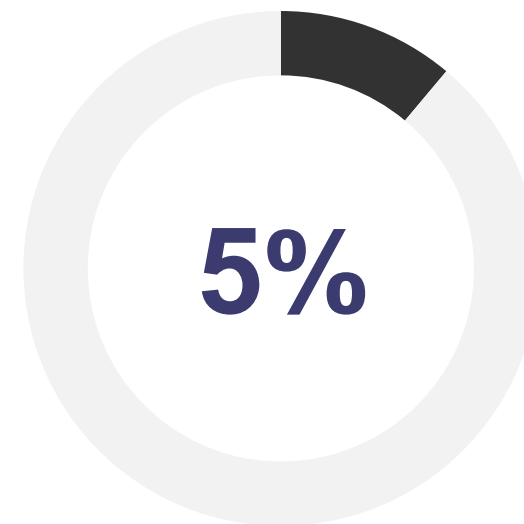


Australian Pathway Market Estimate

Commencements



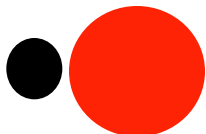
Enrollments



More than 26,000 students

Bottom up count at each university

Top down visa data 15-19 years old



Impact on Higher Ed.

- Strategic planning
- Revise growth outlooks
- Innovation required



Potential Impacts Higher Education

**Overstated
scale
10%**

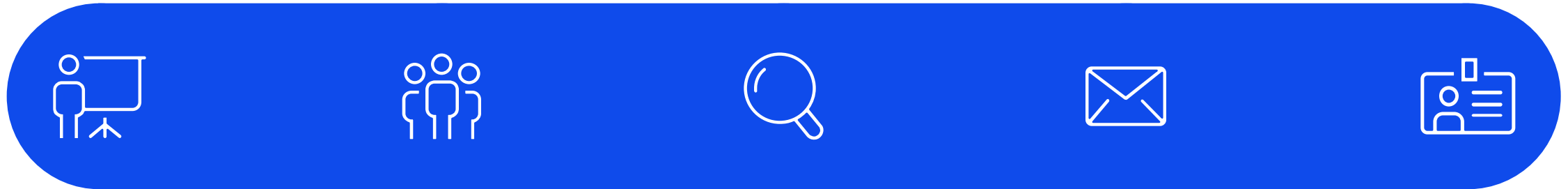
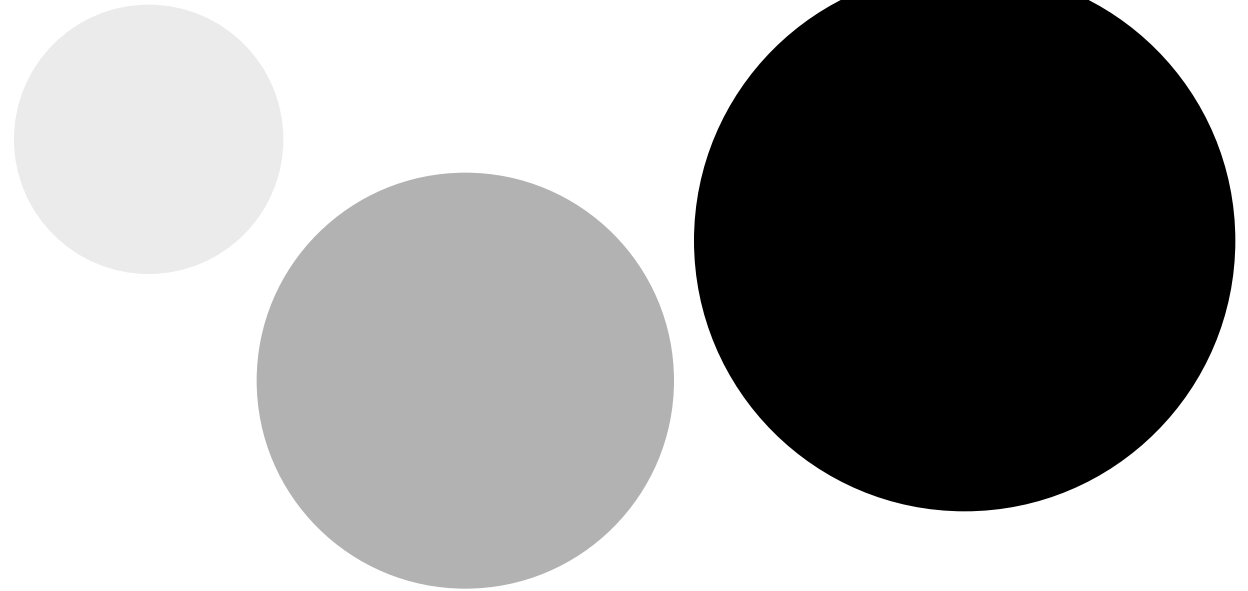
**CAGR
UG
-5%**

**Lost opportunities
Int. schools
USA, Canadian,
UK or NZ**

**Entry
requirements**

**Student
outcomes**

Aspects of Student Success



Identify

Understand, validate & appreciate yourself as a university student

Connectedness

Belong and feel connected

Purpose

Develop a sense of direction and commitment

Resourcefulness

Navigate the system and your competing priorities

Capability

Feel confident and capable as a student



Question 1

How robust is the data?

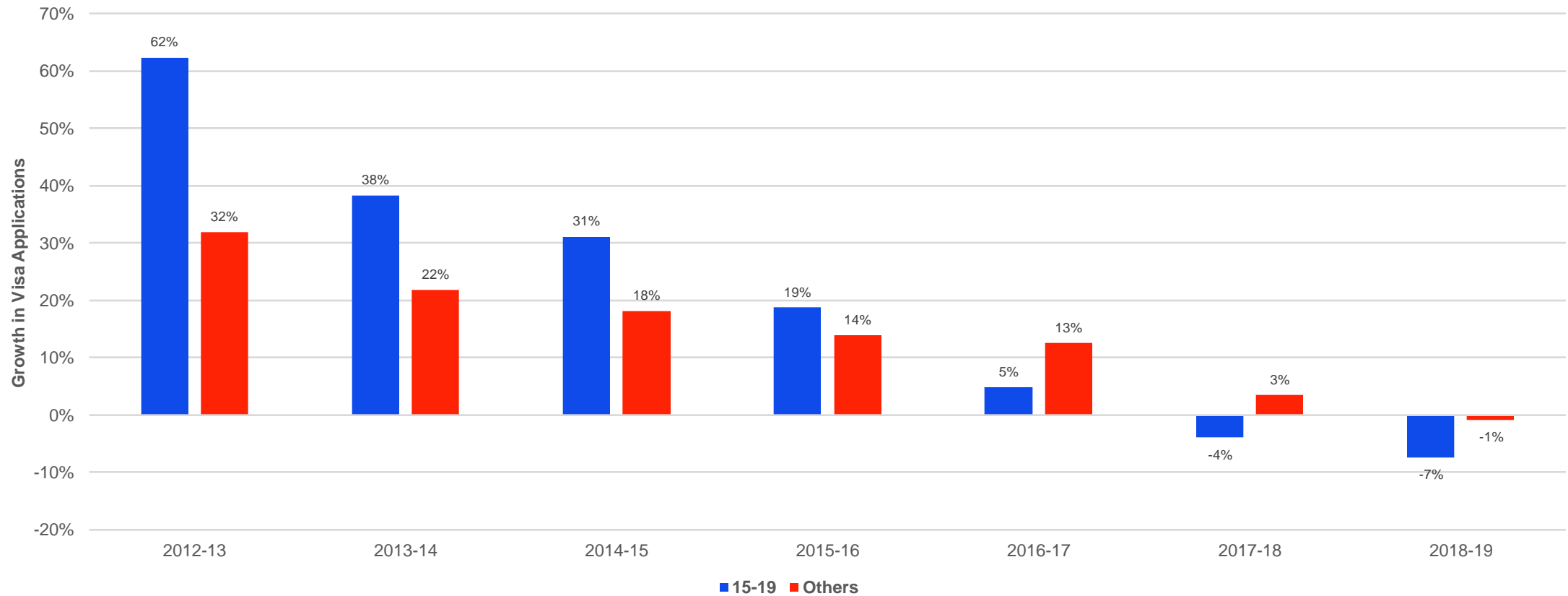
Frames our strategic planning

Drives our **recruitment priorities** for international students

Question 2

What is the trajectory?

Growth in Chinese Visa Application (by Age) in Higher Education Sector (2013-19)



Question 3

- Is Australia's competitive advantage in pathways at risk?
- What innovation is needed?

Question 4

Segmentation

- How can pathways be unbundled?



Question 5

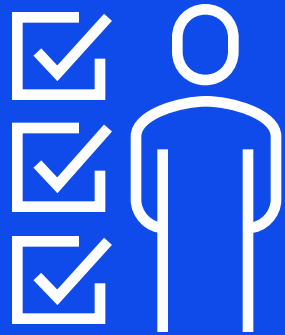
Schools

- How do we link with international school curriculum?
- Positioning Australia earlier



Pathway Research

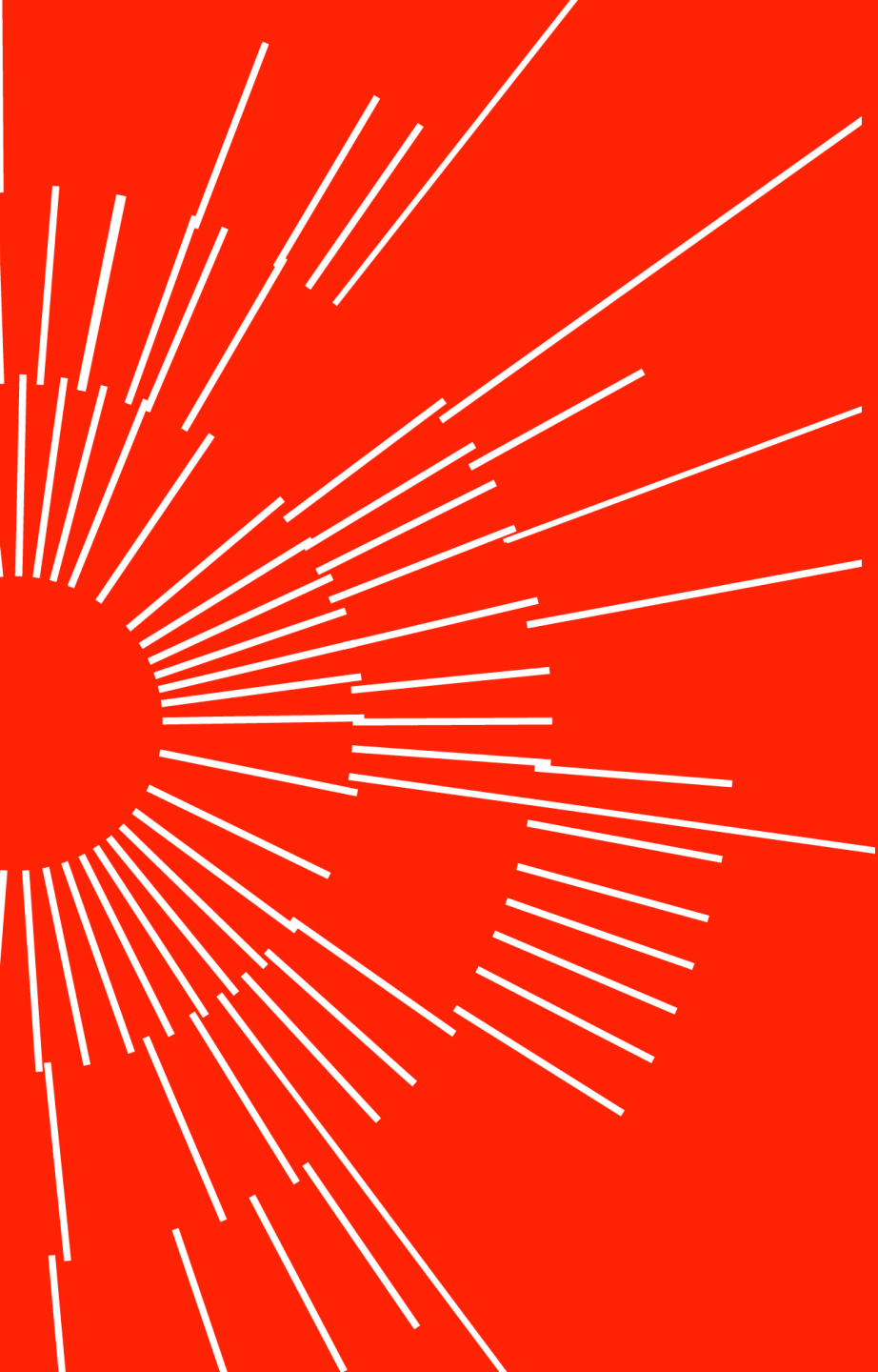
- ✓ Size and growth
- ✓ Market dynamics
- ✓ Benchmarking



Thank you

Questions?





Data Sources

Appendix:

Visa

Home Affairs

www.homeaffairs.gov.au/research-and-statistics/statistics/visa-statistics

data.gov.au/dataset

Austrade MIP

Austrade's Market Information Package (MIP)

Orbis: Data visualisation tool

www.austrade.gov.au/australian/education/education-data/mip-orbis

Australian Govt.

Data and Research,

Australian Department of Education and Training:

www.internationaleducation.gov.au

Ucube

highereducationstatistics.education.gov.au

