Pathways or hidden labyrinth

What does the data really say about pathway programs?

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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 adaption and general study skills to provide an assured progression to higher education.

- Foundation
- Pre-Bachelors
- Diploma &
- Pre-Masters
Pathways for transition

- from teacher centered learning to independent learning
- from a silent observer to an active participant
- from individual study to collaborative assessments
Let’s compare

<table>
<thead>
<tr>
<th>SCHOOL</th>
<th>PATHWAY</th>
<th>UNIVERSITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher directed</td>
<td>Teachers as a guide</td>
<td>Lecturer</td>
</tr>
<tr>
<td>Classroom based</td>
<td>Student centred learning</td>
<td>Self directed learning</td>
</tr>
<tr>
<td>Timetable is fixed and</td>
<td>Focus is on developing skills for independent learning</td>
<td>Lecturers do not check required reading or remind students to complete homework</td>
</tr>
<tr>
<td>student hours are strict</td>
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Pathway to university

- DIRECT TO 1ST YEAR UNI
- DIPLOMA (Academic grades < than required for direct entry to UG degree)
- YEAR 2 of UG DEGREE AT UNIVERSITY
- COMPLETE UG DEGREE

YEAR 12 School

OR

YEAR 12 Foundation

YEAR 12 YEAR 1 YEAR 2
Australian Education System

- PhD
- Masters
- Graduate Certificate/Diploma
- Bachelor Year 3/4
- Bachelor Year 2
- Diploma Year 1 OR Bachelor Year 1
- Secondary Education (Year 7-12)
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

Sources: Department of Education, Report, Completion rates of bachelor students – a cohort analysis 2005-2013
OECD Education at a Glance 2008/2013
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

UNIVERSITY EDUCATION

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 Full-Regulated and International Student Management System (FRSMS) international student enrolment and commencement data are sometimes thought to be the same as international student numbers. However, these data do not directly compare 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 FRSMS 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 Course for Overseas Students (ELICOS) course and commencences school, completing both within the first year. The student would be counted as a commencement and an enrolment in both sectors (ELICOS and school).

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 commences a VET course and commences 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 commences the third ELICOS course and commences the higher education course. The student would count 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 info@education.gov.au


Six commencements and Nine enrolments
Higher Education Enrolments & Commencements

- Enrolments
- Commencements

Enrolments:
- 2011: 250,000
- 2018: 450,000
- Growth: 9.8%

Commencements:
- 2011: 100,000
- 2018: 150,000
- Growth: 4.1%
Chinese HE Education Enrolments & Commencements

- Enrolments: 3.8%
- Commencements: -7.8%

Year:
- 2011
- 2012
- 2013
- 2014
- 2015
- 2016
- 2017
- 2018
- 2019F
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

- UK: 50%
- US: 29%
- Australia: 13%
- New Zealand: 6%
- Canada: 1%
- Others: 1%

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

Pathway Programs Market share by Provider Type

- Corporate providers (50%)
- Universities (32%)
- Colleges (16%)
- Language Schools (2%)

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

Source: Lizzio 2006, 2011
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

data.gov.au/dataset

Austrade MIP
Austrade's Market Information Package (MIP)
Orbis: Data visualisation tool

Australian Govt.
Data and Research,
Australian Department of Education and Training:
www.internationaleducation.gov.au

Ucube
highereducationstatistics.education.gov.au