

Changing Pathways

The future of International students journeys
in Australia

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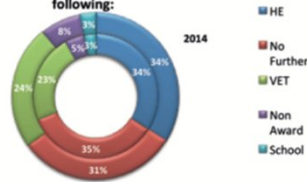
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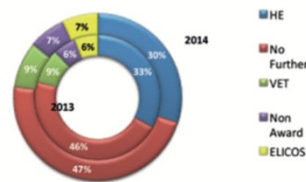
Pathways by sector

PATHWAYS BY SECTOR

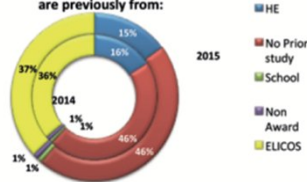
ELICOS - students completed in 2014, did the following:



School - Students completed in 2014, did the following:

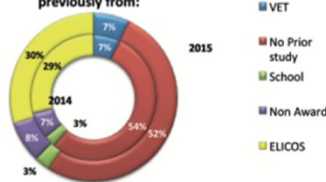


Vocational Education (VE) - commencement in 2015, are previously from:

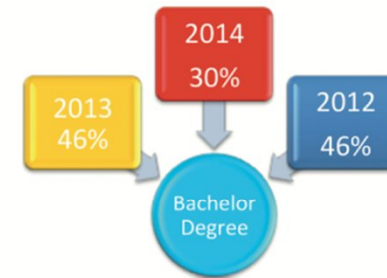


† Changing to a lower Australian Qualification Framework (AQF) level course
15% of VET students (16% in 2014) are from HE

Higher Education (HE)- commencement in 2015, are previously from:



NON-AWARD



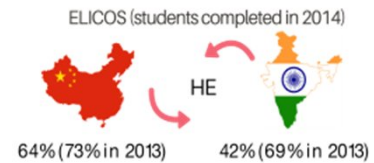
30% of non award students (45% in 2013, 46% in 2012) had studied a non-award course before the Bachelor Degree

Source: Australian Government - Department of Education & Training 2014-2015

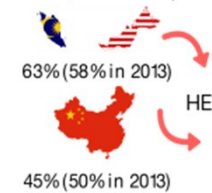
- ❖ About half of the International students will complete at least one pathway program

Pathways by Country and Sector

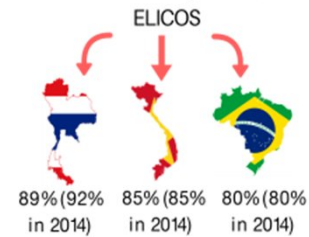
China



School (students completed in 2014)



VET (commencing in 2015)



HE (commencing in 2015)



Source: Australian Government - Department of Education & Training 2014-2015

Competitors

- ❖ UK has the highest number of Foundation programs
- ❖ Asia has the cheapest fees in Foundation programs

Number of available Foundation Studies Pathways



Source: 2015 StudyPortals/Cambridge English

Average foundation studies fees



Average cost per year (in USD) for foundation programs by region, January 2015.

Source: 2015 StudyPortals/Cambridge English

USA:

- 56% of the American universities working with pathway providers are not nationally ranked. (Source: The Landscape of Pathway Partnerships in the US report)
- USA receives the largest share of international students in the world (17%) (UNESCO (2013) Global Flow of Tertiary-Level Students), yet only offers 27.6% of the world's pathway programs.

! Students pursuing English or other preparatory programs will require a separate I-20 visa for those courses, & then a further I-20 for their degree studies.

UK:

- UK offered nearly 2/3 of all global pathway programs, compared to only 12% in North America & 16% in Australia. (Source: June 16 Exporting Education UK).
- 40% of international students bound for undergraduate degrees begin their studies in foundation programs.

! More restrictive immigration policies & by a political climate that has made the country seem less welcoming of international students.

Canada:

- 30% of international students arrive at post-secondary education through pathways programs. There are approximately 10,600 international students currently enrolled in pathway programs but is expected to the number to reach 17,500 by 2020. (Source: Illuminate Consulting Group, 2015).

! From July this year, students are only issued a study permit for the period of the student's prerequisite studies. After successfully completing any such preparatory studies, the student will now be asked to apply for a further study permit.

Future Directions for Australia



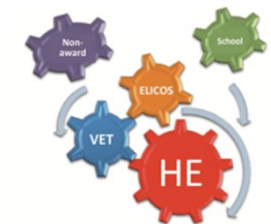
⚠️ China will continue to grow. However, Australian institutions are relying heavily on this market, which is a risk.



Emerging countries, students from Colombia (ELICOS), India (ELICOS & VET) & Nepal (Non-award) will drive growth due to strong economic growth.



South Korea, Thailand, Saudi Arabia & Brazil - possible slow down due to economic & or social instability.



The relationship between the different sectors are connected. As a result of this, if there is a gain or fail that may now be noticed more directly in other parts of the sector.

- ❖ Changing flow through different pathway programs is a key indicator for future trends for all the sectors