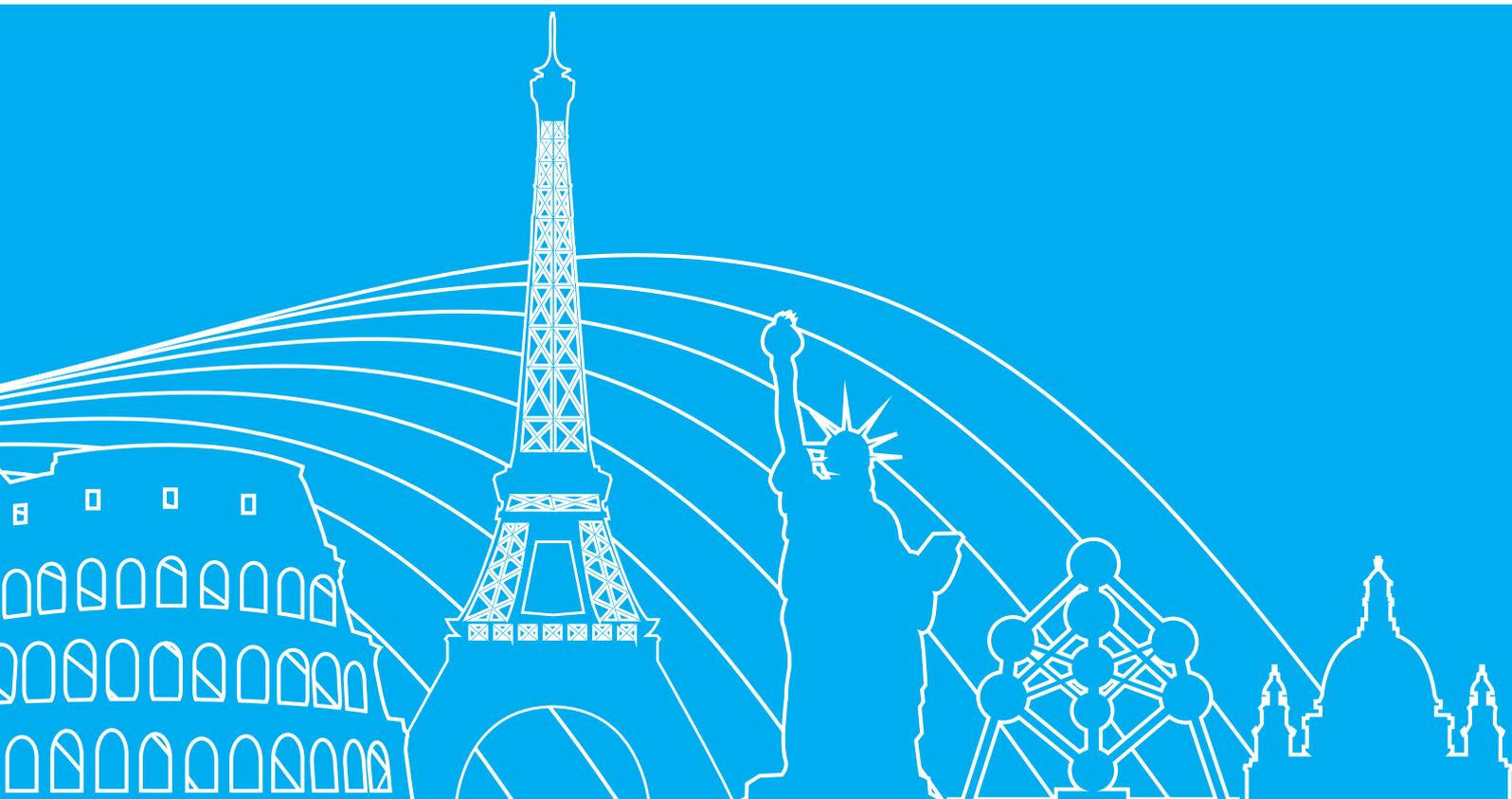


Routes to higher education: the global shape of pathway programmes

A global mapping of an expanding market

September 2016



Summary

Routes to higher education: the global shape of pathway programmes, is a follow-up to the 2015 report from StudyPortals and Cambridge English: *New routes to higher education: the global rise of foundation programmes*, which examined the global growth of programmes preparing students for undergraduate studies.

This updated report now also includes programmes for students seeking postgraduate degrees (such as master's degrees) and has added further data from more than 1,200 pathway programmes around the world, including recently launched programmes, **bringing the total number of programmes analysed to 2,275**. The findings are drawn from StudyPortals' *PreparationCoursesPortal* database, desk research and interviews with industry experts.

What is a pathway programme?

Pathway programmes enable students who do not have sufficient prior academic knowledge, or the necessary study or language skills, to undergo preparation and training that will allow them to enter undergraduate or postgraduate studies. There may also be an element of cultural adaptation.

Different parts of the world and different institutions use various names to describe pathway programmes, such as foundation programme, international year one or preparation course (pre-bachelor or pre-master).

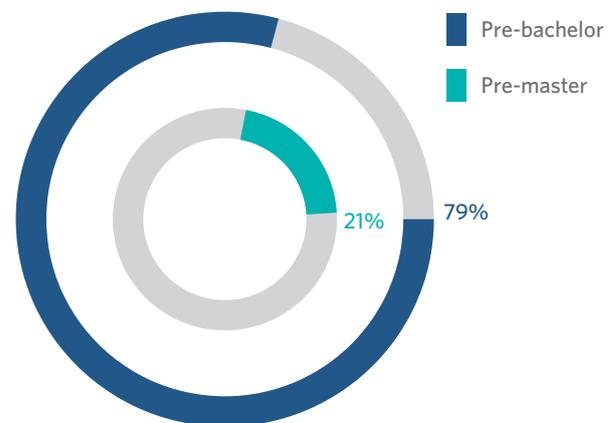
While some pathway programmes are now delivered online or through blended learning, the vast majority (90%) are still taught face to face. Course duration can be as little as four months or as long as two years, but on average pre-bachelor programmes average 12 months in duration, and pre-master programmes tend to be shorter, averaging nine months.

How do the programmes benefit institutions?

Universities benefit from having greater certainty over a student's ability to complete the course before admitting them. They can also benefit from having a more diverse student body and from the revenue provided by international students.

How many programmes are there worldwide?

This study has analysed a sample of 2,275 programmes, 21% of which are pre-master and 79% pre-bachelor. It is estimated that this sample represents 80% of the global market.



The majority of programmes are situated in the USA, the UK and Australia. While the programmes host a diverse body of international students, Asian countries – which account for over half of all international students – are similarly well represented on pathway programmes.

What are the English and academic entry requirements?

Candidates must show proof of English language ability and academic achievement.

Various tests are used to assess English ability and the required level of English also varies according to the level of the particular programme. Programme providers must select candidates carefully to ensure any gap between the students' present language level and the level needed to enter their degree course can be adequately bridged by language training during the pathway programme.

How much do programmes cost?

Costs depend on the region where the programme takes place, with North America charging the most and Asian programmes being the most affordable. However, most pre-master and pre-bachelor courses reflect average university tuition fees for their countries.

What subjects do students study?

Business and Management, Social Science, Engineering and Technology and Humanities account for 65% of pre-bachelor courses and 58% of pre-master courses.

On average students are expected to spend 40–50% of their time developing their English skills and the remainder of their time either working on their subject knowledge or study skills.

How do students gain access to their chosen institution?

Pathway programmes often provide a certificate of completion or diploma which allows access to one or more programmes. Some programmes guarantee successful candidates places on specific courses, while others offer only general preparation for undertaking degree-level study.

What new models are being explored?

Some universities are developing direct partnerships with institutions in the countries they recruit students from, or opening their own branches in these countries. Another 'hybrid' model has also been adopted by some institutions which set up separate, wholly owned commercial entities to run their pathway programmes.

How will the sector change in the future?

The market is expected to grow in line with the increase in demand for studying abroad. Growth in each country will depend on the approach of the host country and their policies/regulations regarding international students.

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Pathway programmes enable students who do not have prior academic knowledge, or the necessary study or language skills, to undergo preparation and training that will allow them to enter undergraduate or postgraduate studies.

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Introduction

As international student mobility continues to grow in what has become a global educational industry, it is increasingly vital for universities to have strategies for bridging the gaps between different education systems in terms of academic knowledge, language ability and study skills.

When a cohort of students begin a higher education degree, it is important that their knowledge level is broadly comparable – whether they are domestic or international students. Pathway programmes have been developed to meet this need: ensuring international students start their degree with the same common base of academic knowledge and communication skills that domestic students are expected to have.

In 2014, over 4.5 million students travelled abroad seeking to fulfil their educational aspirations¹. Demand for courses providing students with the skills to enrol in a full-time degree has grown with the increased mobility of international students.

In 2015, StudyPortals and Cambridge English reported on the increasing number of pathway programmes preparing students to access undergraduate programmes. This second report now includes over 1,200 additional programmes, and has expanded its focus to provide more detail on the USA and pre-master programmes.

This new report provides an overview of the global market for pathway programmes – for accessing both undergraduate and postgraduate studies – and explores key differences between the two across geographic regions.

It answers many of the commonly asked questions about pathway programmes, along with providing insights into emerging trends around the world.

¹ OECD, *Education at a Glance 2014*

The findings

What is a pathway programme?

For the purposes of this report, we have defined a pathway programme as an official course (endorsed/provided by a higher education institution) intended to help grant access to that institution's graduate or undergraduate programmes, for international students who:

- have not met one or more of the admissions criteria for an institution, such as the English language requirement
- are otherwise not considered ready to begin their undergraduate or postgraduate degree.

Students on pathway programmes learn and develop skills so as to be ready for regular coursework at the institution, such as English language skills, or skills related to that specific subject or academic culture. The course may also provide the opportunity to adapt to the host country's culture.

This definition has been based on the Institute of International Education's² description. The full selection criteria used to define pathway programmes for this report can be found in the Methodology section in the Appendix (p20).

How are they delivered?

Recently, some providers have begun offering programmes online or through blended learning (figure 1). Most of these flexible courses are for pre-bachelor pathways, but a few are offered for postgraduate pathways.

However, despite the growing popularity of online and blended learning at bachelor and master's level, the vast majority of pathway courses are still delivered traditionally on campus (figure 2), requiring students to attend classes.

The United Kingdom and USA are the exceptions, in that the proportion of e-learning programmes to campus-based courses offered is higher than other countries (figure 1).



Insights from industry experts

Demand for blended learning, e-learning and short-term programmes is currently increasing, but it is difficult to predict how long this trend will take to mature, particularly in developing countries which may gain most from it.

However, even where universities offer blended learning, students still want some face-to-face teaching. Those newly entering university tend to need more face-to-face interaction. The opportunities for blended and online learning are better suited to 3rd year students who have demonstrated a capacity for independent learning and do not require as much face-to-face teaching.

The increased use of tablets and other mobile devices for learning has meant that even those programmes delivered face to face have some capacity to use blended learning for tasks such as practising language skills.

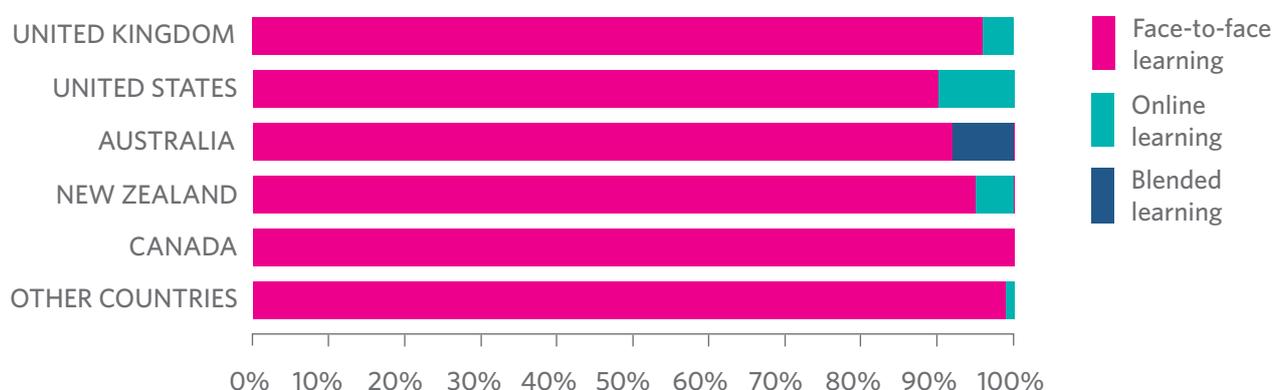


Figure 1: Methods of teaching in the countries with the most pathway programmes

² The Institute of International Education Center for Academic Mobility Research and Impact (2015) *Fall 2014 Snapshot Survey of International Student Enrollment*

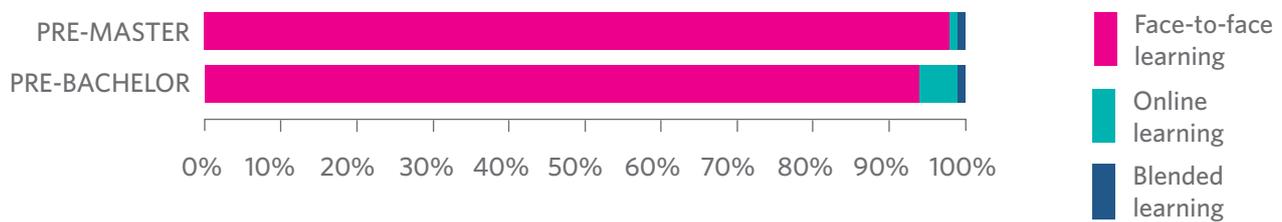


Figure 2: Delivery modes offered for pre-bachelor and pre-master programmes

How long do the programmes last?

The data (figure 3) indicates broad trends regarding the duration of the programmes:

- Pre-bachelor programmes average 12 months in duration, but some intensive courses can be as short as four or six months, while others can last up to 24 months (in 10% of courses analysed).
- Pre-master courses tend to be shorter in duration, usually lasting 9 or 12 months.

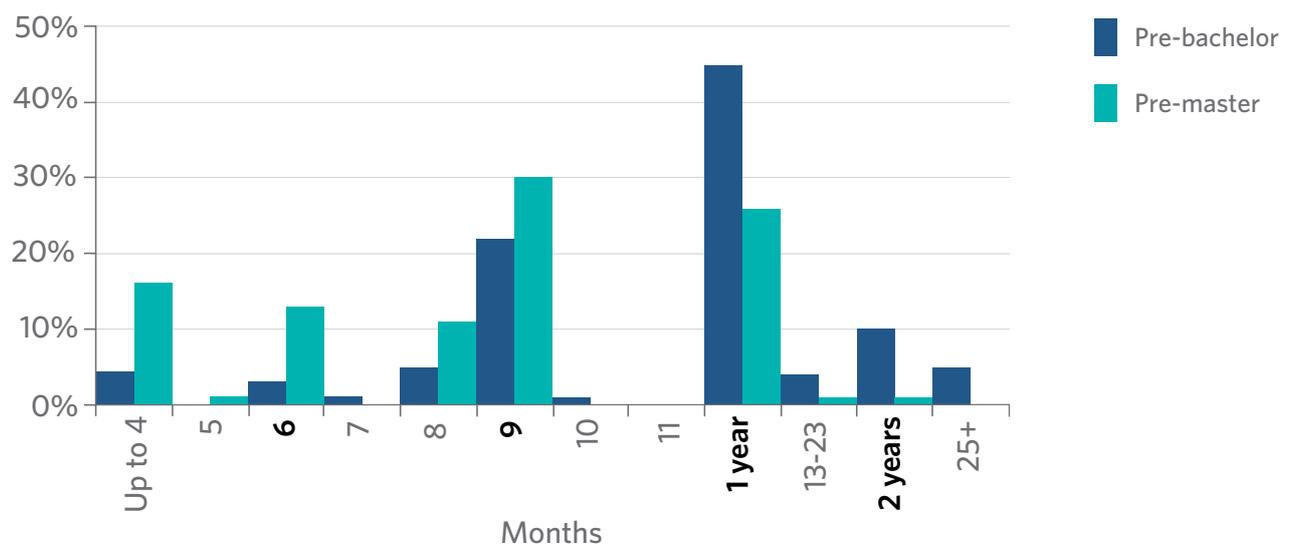


Figure 3: Proportion of courses by duration of course

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Despite the growing popularity of online and blended learning at bachelor and master's level, 90% of pathway courses are still delivered traditionally on campus.

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How do programmes balance language learning against academic study?

The balance between academic preparation and English language skills varies greatly from programme to programme. The student's initial level of English when entering the course is an important varying factor.

Evidence from the industry experts we interviewed indicated that around 40–50% of students' time on a pathway course would be spent on improving their English, with the remainder spent on studying their chosen subject and developing 'soft' study skills, such as communication, independent work, team work and leadership. These soft skills are viewed as particularly important within the US.

In most cases, English language assessment is conducted as part of ongoing evaluation performed throughout the teaching of the academic subject.



Insights from industry experts

Because students now have a higher level of English on arrival at courses than in previous times, they are seeking to come away from pathway programmes with a certificate or another learning experience in addition to gaining English skills.

What are pathway programmes called worldwide?

Pathway programmes can be found under different names, depending on the country in which they are offered, and the institutions offering them.

Most programmes use one of the following names:

- foundation programme
- pathway programme
- preparation course (pre-bachelor or pre-master).

A thorough review of different names for pathway programmes, including analysis of commonly occurring words in names, appeared in our 2015 report: *New routes to higher education: the global rise of foundation programmes*.

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Pathway programmes provide universities with students who are well prepared to be successful in their studies and who will go on to graduate.

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How do the programmes benefit institutions?



Insights from industry experts

Pathway programmes provide universities with students who are well prepared to be successful in their studies and who will go on to graduate.

Where pathway programmes are conducted in-house, universities can also access additional revenue from international students via their tuition fees.

Universities also gain benefits from having a diverse cohort of students and extending their reputation in target countries where they recruit students.

Universities gain from pathway programmes in a number of ways:

- Universities benefit from ensuring they have confidence in students' ability to successfully complete their course before admitting them to further study.
- Creating a clear path for international students to enter their institution encourages increased diversity of the student body – most universities have policies encouraging variety in the nationalities and backgrounds represented within the student cohort.
- Universities gain from tuition fees (where pathway programmes are held in-house).
- Insight into the entry level of students taking pathway programmes is useful for institutions when developing or improving their courses.
- Pathway providers can offer universities the benefits of their large sales and marketing network to recruit students the university would otherwise have found it difficult to engage with directly.
- By enrolling students who are talented, but do not yet meet the admission criteria for the full-degree programmes, institutions can widen the pool of students they recruit from.

How many programmes are there worldwide?

A total of 2,275 programmes were identified and analysed for this report. It is difficult to estimate how many programmes were not included, but taking into account the restrictions made in the selection of data, and the rate of new programmes being developed, it is conservatively estimated that our sample represents approximately 80% of the overall global offering.

In terms of their global distribution (figure 4), the majority (55%) of programmes are offered in Europe. North America and Oceania are in second and third place, respectively (30% and 14%). Asia offers just 1% of the programmes analysed, and they are mostly pre-bachelor.

Splitting the data by pre-bachelor and pre-master programmes shows that North America offers 50% of pre-master courses globally. Europe is second, offering 45% - with most of those located in the UK.

English-speaking countries have topped the list of destinations for international students³ in recent years, which is no doubt why the majority of pathway programmes are found in these countries.

Even when pre-master programmes are added to the data, the UK, although it receives only 10% of internationally mobile students, still offers almost half of the world's pathway programmes. Conversely, the USA receives the largest share of international students in the world (17%³), yet only offers 27.6% of the world's pathway programmes - indicating an opportunity for growth as the market matures and higher education institutions admit more international students.

Despite the varying approaches of the USA, the UK and Australia, a clear trend emerges from the data - the three English-speaking nations that between them host over a third of the world's international students (34%⁴), also have the most pathway programmes to cater for them.

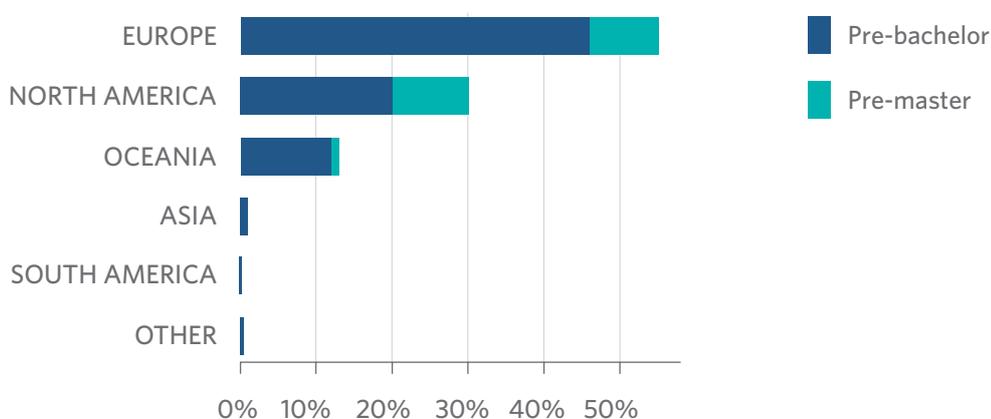


Figure 4: Distribution of pathway programmes by continent

³ UNESCO (2013) *Global Flow of Tertiary-Level Students*

⁴ International Unit (2015) *International Higher Education in Facts and Figures*

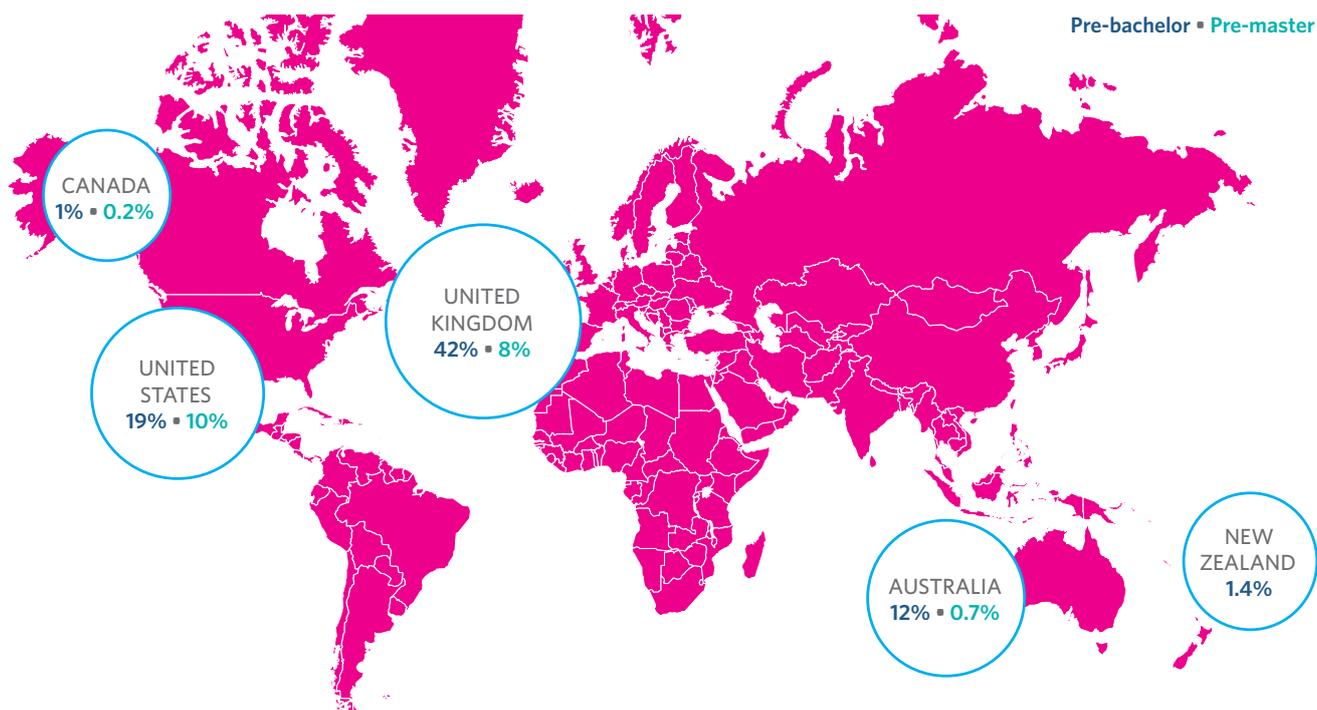


Figure 5: Distribution of pathway programmes by country (only showing countries with >1% of programmes)

Countries with less than 1% of global programmes (descending order)

Ireland, Malaysia, United Arab Emirates, Czech Republic, Netherlands, Sri Lanka, Germany, China, Hungary, Poland, Russia, Spain, France, Malta, Austria, Belgium, Colombia, Cyprus, Israel, Italy, Japan, Kazakhstan, Mauritius, Norway, Qatar, South Korea, Switzerland, Finland, Sweden, Lithuania



Insights from industry experts

One reason for the strength of the pre-master market in the UK is that it is one of the only countries offering one-year master's programmes, making it even more critical to ensure students have the right skills before the programme starts.

Other factors include UK secondary education being one year longer than in many countries, and UK degrees being shorter, requiring more international students to catch up before entering intensive undergraduate study.



Insights from industry experts

The offering of pre-master programmes in Australia is very underdeveloped: even universities with strong master's programmes tend not to offer pre-master programmes. Australia has recently moved to a two-year system for master's degrees, perhaps making pre-master programmes less necessary than in the UK.

What is the global value of the market?

We estimate that the global market for English-medium pathway programmes has a value of US\$1.4 billion per year.

This estimate is based on extrapolation of data provided by market experts, and our own desk research.

Where do students come from?

Research by the OECD and the UNESCO Institute for Statistics indicates that the greatest proportion of the world's international students (53%) continues to originate from Asian countries.

The countries with the largest numbers of students travelling internationally for study are China (22%), India (6%) and Germany (3.9%)⁵.

The trend in many universities is towards policies that encourage a diverse student body within their pathway programmes. However, while these priorities are frequently incorporated into pathway recruitment strategies, universities and pathway providers have recruitment targets to meet, and must inevitably focus on those countries showing the most demand for international study - resulting in Chinese and Indian students frequently being well represented on programmes.

Who provides the programmes?

While just under a third of universities offer their own pathway programmes as part of their general educational offering, the majority of programmes are outsourced to pathway providers.

The relationship between the institution and the pathway providers varies greatly. Some institutions simply license providers to carry out pathway programmes on their behalf, but with others, the relationship has been described as a 'joint venture', with closer partnership between the two agencies and fuller integration of the pathway into the university degrees.

Which providers have most market share?

Six providers represent more than half of the market for pathway programmes: Cambridge Education Group, INTO University Partnerships, Kaplan International Colleges, Navitas, Study Group and Shorelight. These programmes are most common in the UK and Australia, but are also growing in the USA.

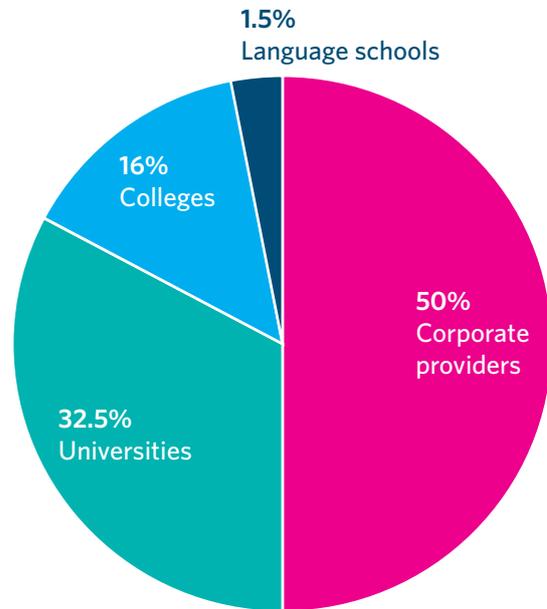


Figure 6: Market share of pathway providers by type*



Insights from industry experts

While the experts we talked to agreed that encouraging diversity within the student body was important, they also agreed that China was the major source country in terms of international student recruitment, mentioning that around one in three international students is Chinese.



Insights from industry experts

Pathway providers are predicted to grow in the USA which, compared with other countries, has been slow to adopt the use of third-party agencies for delivering pathway programmes.

One of the challenges the USA faces, in terms of the growth in use of pathway providers, is forming partnerships with these agencies and ensuring they provide students with the correct level of training.

⁵ OECD (2015) *Education at a Glance 2015: OECD Indicators*, OECD Publishing

* Based on number of programmes listed online

What are the English and academic entry requirements?

For students, the entry requirements have two main components: language assessment and the evaluation of academic knowledge.

Academic requirements

Generally, pathway providers need proof of academic credentials to grant access to their programmes. The level of knowledge required varies widely, depending on the courses students ultimately intend to apply for.

Students may be asked to provide this proof in the form of a high-school certificate or bachelor certificate, depending on the degree level they seek. Some students may only be required to demonstrate they have completed a certain number of years in education.

English language requirements

Pathway providers will use some kind of assessment of English language ability to gain evidence that candidates' English skills are at a level suitable for academic study. They need to be certain that:

- the candidate has sufficient communication skills to complete the pathway programme;
- the gap between the candidate's current language skills and those required for entering their chosen degree course can be bridged within the timescale of the pathway programme.

Candidates failing to demonstrate sufficient English ability may be offered additional intensive language training.

What kind of English assessment is used?

While established tests such as *IELTS* and TOEFL (Internet or paper-based version) remain the most requested English assessments for admission to pathway programmes, other assessments such as *Cambridge English: Advanced (CAE)* and *Cambridge English: First (FCE)* are also in use.

A minority of providers do not use any established English test, either devising their own, or giving candidates academic tasks to assess their English ability.

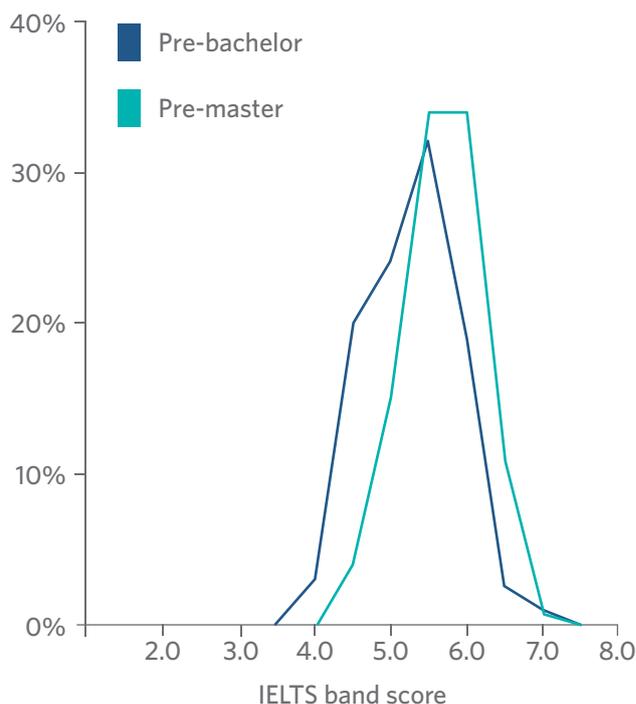


Figure 7: Distribution of English level entry requirements

Which English levels are required?

Analysis of both TOEFL iBT and *IELTS* test requirements (figure 7), shows that the *IELTS* score requirement for pre-bachelor programmes is usually 5.0 or 5.5 (CEFR Level B1-B2), while a broader range of requirements exists for pre-master programmes – between 5.5 and 6.5 (B2-C1). TOEFL iBT follows this general trend, with pre-bachelor programmes mostly requiring scores between 45 and 60 points, or between 65 and 75 points for pre-master courses.

Because of the in-depth nature of postgraduate study and the greater demands on written and spoken communication at that level, postgraduate programmes have higher language requirements than undergraduate programmes. More than 97% of the pre-master programmes analysed had higher English requirements than pre-bachelor programmes and this was reflected across almost every region (figure 8).

Programmes in Oceania or North America tended to have the highest language requirements (the most requested *IELTS* scores being 6.5 and 6.0 respectively). This can be compared with Europe, where the UK accounts for the majority of programmes, and 5.5 is the most requested score.



Insights from industry experts

For many years, *IELTS* was the only approved qualification for Australian student visas and many students still choose *IELTS* as the 'safe' option.

Now that more qualifications are on the approved list and are recognised by institutions, we may see more students applying with qualifications such as *Cambridge English: Advanced (CAE)*.

A similar situation exists in the USA where pathway programmes tend to be TOEFL oriented because it has historically been the general condition for graduate/postgraduate programme entry.

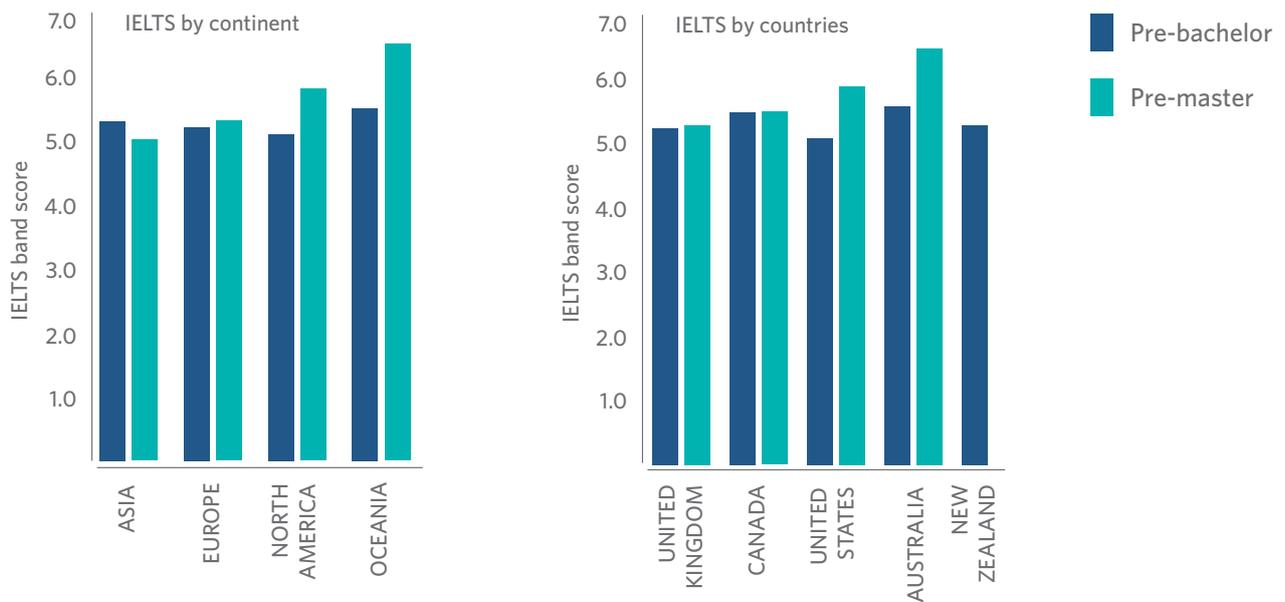


Figure 8: Average IELTS scores required for admission



Insights from industry experts

The gap between a student's English ability and the language requirements for entry to the university programme is a determining factor in the length of pathway programmes, with most students being expected to increase approximately 0.5 on the *IELTS* band score system each semester.



Insights from industry experts

On their journey from admission on the pathway course to progression to university, students will probably have their English language tested at least four times, through formal internationally recognised exams as well as in-house tests.

How much do programmes cost?

Setting appropriate fees is crucial: on the one hand, universities and providers depend on the income from tuition fees to develop their programmes; on the other hand, the relative costs could influence students to choose one institution/provider over another.

While general indications show that fees for pathway programmes are similar to those for a first year in a university programme, costs vary widely from country to country and also across subjects. Programmes leading to degree courses in Life Sciences and Medicine, Natural Sciences, and Engineering tend to be the most expensive, while the lowest fees are found on general programmes.

Our research shows the highest average fees are for programmes based in North America and Australia. Average fees in some European countries are also quite high (e.g. Switzerland), while Asia has the most affordable tuition fees.

Data from the USA and the UK (which accounts for most of the data for Europe), indicates that the fees charged for pre-bachelor and pre-master programmes are broadly similar.

It is also important to note that there are wide variations in tuition fee policies among pathway providers within the same country. Each university has its own policy and sometimes fees differ depending on the country the students come from (e.g. UK universities distinguish between EU and non-EU students).

Also, those pathway programmes which guarantee places at institutions with a prestigious reputation can charge higher fees than those for institutions perceived to be lower ranking. However, our data showed no difference in average fees between pathway programmes offered by private providers and those offered by the universities themselves. There was also no clear price difference between programmes offering guaranteed progression to a university course and those that didn't have this guarantee.

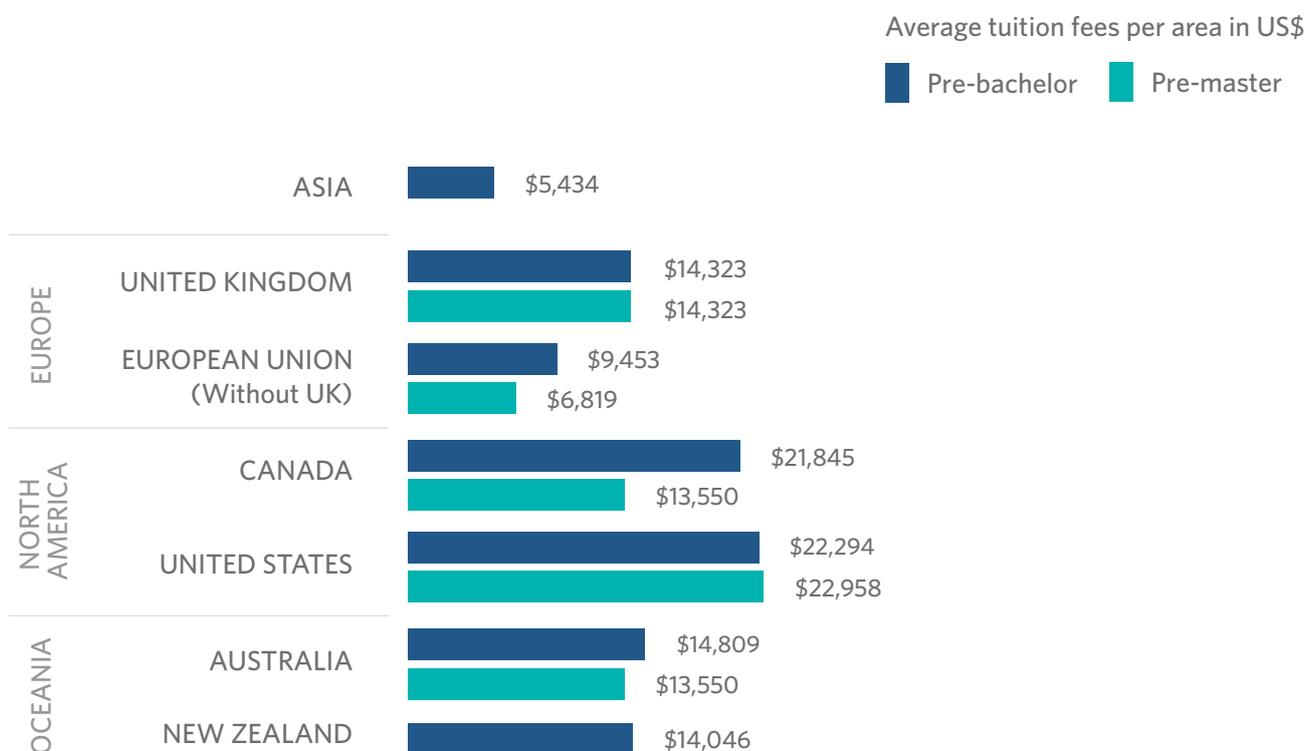


Figure 9: Average tuition fees per country or region*

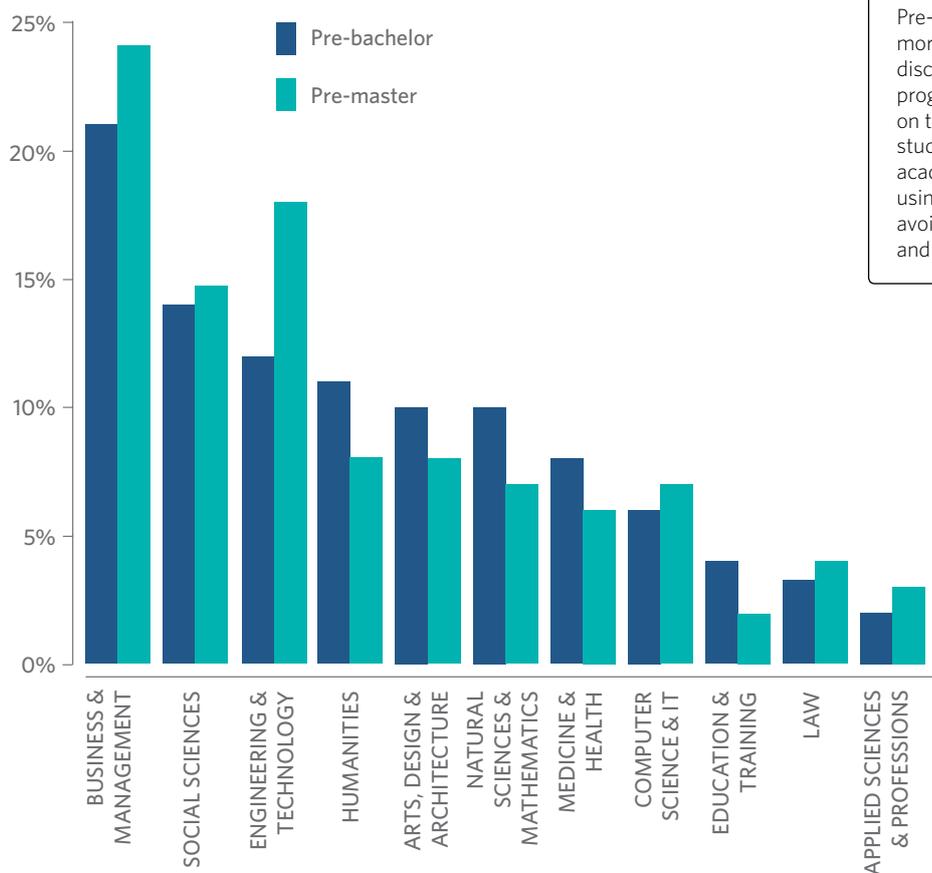
* Using XE.com exchange rates in June 2016

What subjects do students study?

Overall, the majority of students accessing pathway programmes are seeking to enter courses in Business and Science (21%), Social Sciences (14%) and Engineering and Technology (13%).

For pre-master programmes, 24% of all prospective students are interested in Business and Management, while 18% choose Engineering and Technology, or Social Sciences (15%).

There is a noticeable difference between the proportion of pre-bachelor and pre-master courses focusing on Engineering & Technology.



Insights from industry experts

Pre-bachelor programmes are usually more focused on the academic discipline, while in pre-master programmes more emphasis is placed on the 'soft' skills needed for successful study, such as finding and interpreting academic literature, identifying and using appropriate research methods, avoiding plagiarism, academic writing, and engaging in classroom debates.

Figure 10: Distribution of academic disciplines as a percentage of pre-bachelor and pre-master programmes

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Pre-bachelor programmes are usually more focused on the academic discipline, while in pre-master programmes more emphasis is placed on the 'soft' skills needed for successful study.

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How do students gain access to their chosen institution?

What qualifications do students receive?

Some pathway providers offer a certificate of completion or diploma that can be used to enter courses. However, they have little value beyond gaining acceptance onto the specific course/s for which they are intended. However, there are variations - Victoria University in Australia, for example, offers sub-degree programmes that are qualifications in their own right, and which award credits that can be recognised by other institutions.

How useful are programmes for gaining admission?

At pre-bachelor level, the majority (56%) of pathway providers offer successful students guaranteed places on specific courses at that institution, or at partner institutions. A relatively small number offer conditional access to a wider range of courses, while 38% offer only general preparation for study at bachelor level.

At the pre-master level, programmes offering only general preparation are in a narrow majority (51%) with 49% of courses leading to guaranteed or conditional places on postgraduate courses.

Programme type	Guaranteed	Conditional	General preparation
Pre-bachelor	56%	6%	38%
Linked to (average)	10 courses	24 courses	10 courses
Pre-master	42%	7%	51%
Linked to (average)	7 courses	5 courses	13 courses

Figure 11: Proportion of pathway programmes by type of entry condition to average number of linked courses

While pathway programmes are usually developed to access a small number of higher education courses, some pathway programmes grant access to a larger range, depending on the provider's partnerships with other institutions and the recognition of that programme.

Of those pathway programmes guaranteeing access to one or more higher education courses, more than 55% offer access to six or more university courses.

On such programmes, students may be expected to nominate the course they want to progress to at the start of the pathway programme, or may instead have a choice of which to apply to at the end of their programme, depending on their performance and achievement.

X-Y Number of linked courses
% Proportion of all programmes

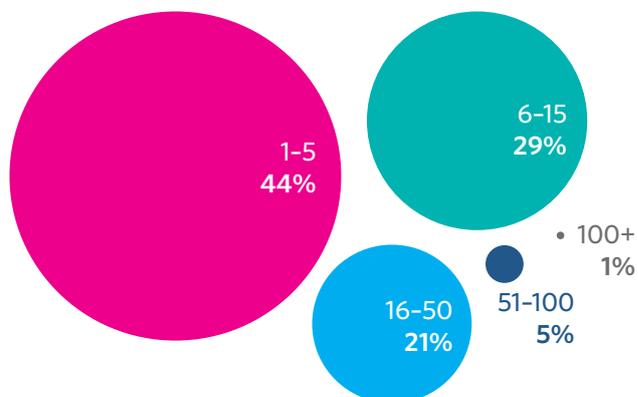


Figure 12: Number of university courses students can choose between after finishing a pathway programme that guarantees entry



Insights from industry experts

Some universities integrate their course modules directly into the pathway programmes to ensure students are better prepared and have the right requirements for advancing to their degree.

What new models are being explored?

Some universities are making innovations within the market for pathway programmes by developing direct partnerships with institutions in the source countries, or opening their own branches in those countries. This enables students to access the same pathway programmes provided at their intended destination, without leaving their own countries. Successful completion then gives them access to the institution's undergraduate programmes.

Another 'hybrid' model has also been adopted by some institutions, whereby instead of outsourcing their pathway programmes to one of the 'big six' providers, they are run by a separate, wholly owned commercial entity set up by the institution.

Other institutions are also offering an 'International Year One' where students get additional support during the first year of their undergraduate programme, to make their transition to international higher education smoother.

Future of the sector

How will the sector grow?

In 2015, the OECD⁶ predicted the trend for students enrolling in international courses would continue upwards (figure 13)⁷. Altbach and Bassett⁸ project 8 million international students by 2025. It is therefore expected that demand for pathway programmes will also continue, growing in line with this increasing demand for international education. In this final section we have taken existing data and qualitative evidence from industry experts to make informed predictions about where growth may come from, and the factors that may encourage or inhibit it.



Insights from industry experts

Australia is perceived as having led the way with foundation/pathway programmes, with each major institution having some kind of programme in place. Anecdotally, an attendee at an education conference once asked about the future of pathway programmes and received the answer: "Wherever the Australians are, is where the future of pathway programmes will be."



Demand for pathway programmes will grow in line with increasing demand for international education.

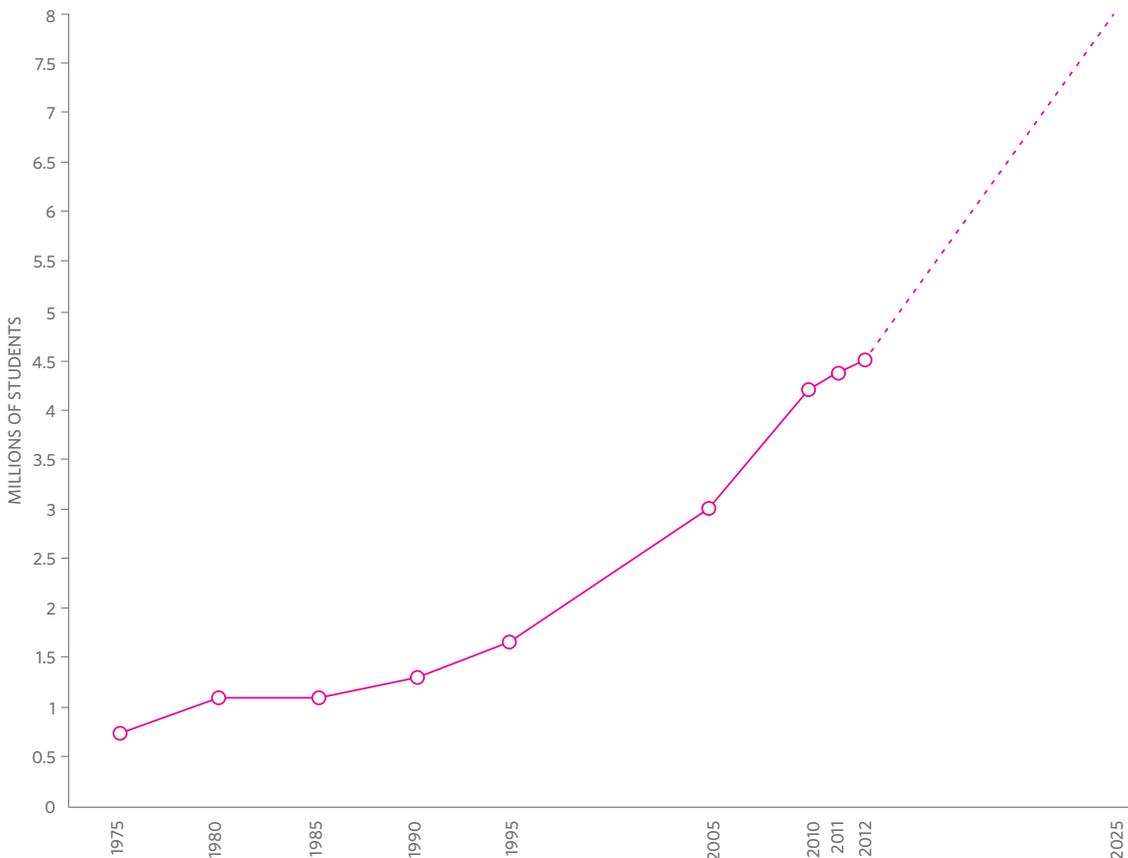


Figure 13: Actual and projected number of students enrolled outside their country of citizenship

⁶ OECD (2015) *Education at a Glance 2015: OECD Indicators*, OECD Publishing

⁷ For breakdown and analysis of these figures, see our first report: *New routes to higher education: the global rise of foundation programmes*.

⁸ Altbach, P. and R. Bassett (2004), "The Brain Trade", *Foreign Policy*, September-October, Washington, DC, pp. 30-31.

Demand for pre-master programmes

The proportion of international students studying on degree courses varies according to the level of study – with the highest proportion of international students being found at master- or doctoral-level programmes⁶.

The demand for postgraduate study among international students could be a result of the prestige and employment benefits students gain from studying abroad, which may be greater for higher degrees than for undergraduate study. Other possible factors are the shortage of postgraduate places compared with undergraduate places in students' home countries (as is the case in India), and the costs of taking a one- or two-year postgraduate programme abroad compared with a three- or four-year undergraduate programme.

However, the proportion of international students at postgraduate level is not reflected in the numbers of pathway programmes offered – only 21% of pathway programmes are developed for students wanting to enrol on a master's programme.

This disparity might be accounted for by the different education systems around the world being easier to bridge at postgraduate than undergraduate level.

Even so, demand for pathway programmes at higher levels of education could still grow in line with the increasing number of international students.



Insights from industry experts

Cultural differences between approaches to education can make it more difficult for students from Asian countries to immediately integrate and succeed in their international studies. Therefore, they usually benefit from additional courses on academic research, critical interpretation of academic literature and essay writing.

English as a medium of instruction (EMI)

A swiftly growing trend has emerged which has seen English shifting from simply being taught as a foreign language (EFL) to being the international medium of instruction for academic subjects⁹. The growth of English as medium of instruction (EMI) has seen an increase in courses taught in English in non-English-speaking countries, particularly Continental Europe. This is expected to further contribute towards the mobility of international students and, consequently, demand for pathway programmes.



Insights from industry experts

One of the greatest challenges for the growth of EMI is to get and train sufficient teachers to teach in English, and to teach English to such a level that students are ready to follow university courses in English.

The effects of policy and legislation

As stated in the OECD's *The Shape of Global Higher Education*¹⁰, the majority of the host countries studied implemented visa policies that welcomed international students, and an easing of immigration policies in recent years was noted.

This has opened the market to international graduates, increasing students' job prospects and enhancing the perceived benefits of pathway programmes. But the focus now needs to be aimed at policies that will make the labour market accessible to international graduates and allow them to find work in their country of study¹⁰. Countries such as Canada and Australia already allow international students to remain in-country to look for work for a maximum of three and four years (respectively) after their studies. However, while most other OECD countries have similar policies for international students, they are for shorter periods.

“

The demand for postgraduate study among international students could be a result of the prestige and employment benefits students gain from studying abroad.

”

⁹ Julie Dearden (2014) *English as a medium of instruction – a growing global phenomenon*

¹⁰ Janet Iiieva, Michael Peak (2015) *The Shape of Global Higher Education: National Policies Framework for International Engagement*.



Insights from industry experts

There is a high volatility within programmes, especially those sponsored by governments, where policy change and economic or currency fluctuations can all have an impact.



Insights from industry experts

Even small changes to immigration or visa policy can have unforeseen effects which can be difficult to predict. The UK Visas and Immigration service's recent changes to English language regulations for international students are a case in point.

Where will students come from?

It is to be expected that the country of origin for students joining pathway programmes will continue to broadly correlate with general trends for international students. This has already been observed within the mobility statistics (see page 9), but demand for pathway programmes will remain driven by the disparities between education systems in students' home countries and their chosen institution, along with cultural differences in their approach to degree-level learning.

Our experts foresee that demand for pathway programmes at both the pre-bachelor and pre-master level will continue to increase from Asian countries, most notably China and India. Both countries are of particular interest for pre-master programme providers because degrees in Science, Technology, Engineering, Mathematics and Business Studies obtained from abroad are particularly valued and well respected.

Latin American countries have not had a history of sending students abroad, and it's perceived by some industry experts that this market is ripe for growth, particularly in countries such as Colombia.

Likewise, with the exception of Nigeria, Africa is not currently a major source region for international students, but some industry experts have indicated that they expect this to change within the next five years. Rwanda and Angola, which are experiencing population growth, are cited as being potential future markets.



Insights from industry experts

Countries where primary and secondary school education lasts 12 years instead of 13 may need a bridge between their output and the intake of the overseas university.

Countries such as China, Korea and Japan have already adopted a strategy for this so students may no longer need to take an academic pathway course in the future.

The Middle East has a 12-year system and is consequently one of the biggest sources of students for foundation studies.



Insights from industry experts

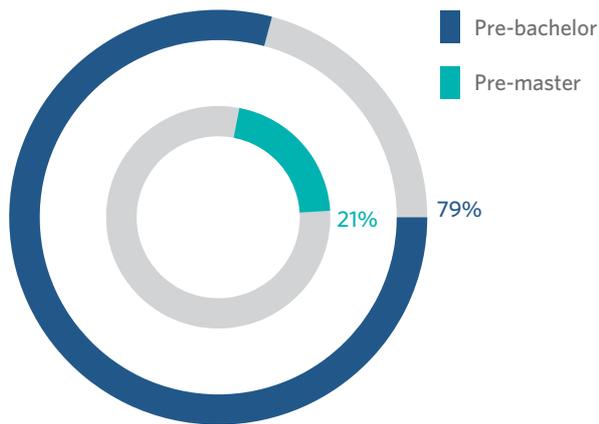
Demand for access to university programmes from candidates in South Asia, West Africa and Gulf regions is strong and expected to continue to accelerate. One expert from an Australian institution commented:

"At the moment, our largest recruitment countries are China and India, but we also actively recruit students from Asia Pacific, Turkey, Europe, and South America. We also think there is a lot of growth potential in Eastern Europe as a major opportunity, as well as South East Asia (e.g. Burma and Vietnam)."

Appendix

Methodology

Researchers for this report identified and analysed a total of 2,275 programmes, of which 21% were developed for students enrolling for a master or graduate programme, and the remaining 79% offered preparation for bachelor's degrees.



Research for this document included both quantitative and qualitative approaches, and the data, collated from StudyPortals' *PreparationCoursesPortal*, referenced programmes distributed all around the world.

Data collection techniques

Semi-structured interviews with 10 industry experts	In-depth qualitative understanding of the market. Semi-structured approach to frame the experts' insights to allow benchmarking.
Analysis of data from StudyPortals' Preparation Course database	Information about the number and types of programmes. Most of this data comes directly from programme providers, complemented by StudyPortals' desk research.

Pathway programme selection criteria

The following criteria were used to identify pathway programmes and exclude programmes out of scope, e.g. high schools providing A-levels, international baccalaureates and generic college diplomas:

Progression to university	The programme is provided by an institution that provides at least one undergraduate or graduate degree programme itself. Or the independent pathway provider has at least one university partnership.
Entry requirements	Entry requirements are lower than for the progression degree.
International	The programme is aimed at international students.
Language	The programme is taught in English and website content is in English.

Data collection restrictions

The methodology approach used in this research imposed the following restrictions:

- Web pages in languages other than English were not considered.
- Programmes were included only if they have an openly visible presence on the internet or in other freely available publications. Data from sources not openly published was not considered.
- Data was collected within a specific time frame. Programmes may have changed requirements or discontinued since the data was collated.
- The different ways in which institutions name and market their programmes influenced the number of programmes that could be identified.

The constraints imposed by this methodology should be taken into account when drawing conclusions from the findings. Even though the research has been conducted to high standards, neither StudyPortals nor Cambridge English can accept liability for the accuracy of any of the provided insights.

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This report has been compiled by two educational organisations with privileged access to market data, with the intention of contributing to the educational sector's general understanding of pathway courses and pathway provision.

The findings of this report have drawn on the combined expertise of these two organisations and the unique data they have collected on language assessment and higher education.



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For more information: www.studyportals.com

Our mission is to empower the world to choose education: we want to increase accessibility and stimulate people to pursue an education, and furthermore we want to inform and help them to choose the institution, programme and environment that most suits them.

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Since 2007, our platforms have enabled students to choose the best international university courses, and universities to reach the right international students. Our quality approach has allowed us to gather unique insights into the way students search for study programmes and the kind of information that helps them make decisions.

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For more information about how StudyPortals can help higher education institutions, go to www.studyportals.com/institutions



For more information about pathway programmes, go to www.preparationcoursesportal.com



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To learn more about Cambridge English exams and the CEFR, go to www.cambridgeenglish.org/cefr

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Together with IDP Australia and the British Council, Cambridge English is also one of the partners that develops and produces the *IELTS* test.

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