

**ROOM TO GROW:  
PERSPECTIVES FROM THE 2017 CANADA  
PATHWAYS REPORT**

**CBIE Annual Conference**

- **This presentation was delivered by ICG at the CBIE Annual Conference in Halifax on 20 November 2017.**
- **The presentation shall be considered incomplete without oral clarification.**
- **The opinions expressed in this presentation are those of the authors alone.**
- **Data was sourced from a variety of national-level sources. ICG cannot vouch for the accuracy of the underlying data collection and reporting methods.**
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## Introduction and Housekeeping

**The Importance of Pathways from a Canadian Perspective**

**Comments on the 2017 Canada Pathways Report**

### **Case Studies**

**CultureWorks**

**Langara College**

**ELS**

**Education Victoria**

**University of Toronto (informational)**

### **Discussion**

## Please Note

- **This session will be run somewhat different from the CBIE conference session information.**
- **We will explain why, and how this is reflecting two helpful changes in the structure of the report.**

- **Which sector do you represent** – Universities, colleges, schools, language schools/pathways providers, public agency, or agent?
- What do you think is the **share of first-time undergraduate degree** program entrants who enter Canadian universities and colleges?
- Have you observed **growth in pathways seats** in your environment (entity and/or market)? What happened in 2017?
- What do you think constitutes the **most salient trend** in the Canadian pathways landscape you have observed?
- What do you think is the **total global economic impact** pathways operations create (tuition, fees, testing, housing, etc.)?

## • Chair

- **Paul Bailey, Deputy Director, International Education Division, Global Affairs Canada**

**Chair**

## • Presenters

- **Tina Bax, Founder and CEO, CultureWorks, ON and beyond**
- **Ajay Patel, Vice President External Relations and Development, Langara College, BC**
- **Mike Walkey, Director, ELS Language Centers, ON and BC**
- **Dr. Jeff Davis, Director ISP, Victoria School District (Education Victoria), BC**
- **Dr. Daniel J. Guhr, Managing Director, ICG**

**Public-Private**

**Intra-PSE**

**Private Provider**

**Public Multi-Party**

**Numbers...**

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# THE IMPORTANCE OF PATHWAYS FROM A CANADIAN PERSPECTIVE

- **Comments from Paul Bailey, Deputy Director, International Education Division at Global Affairs Canada.**



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# COMMENTS ON THE 2017 CANADA PATHWAYS REPORT

## Context for the Report

- **Intake.** Between 25-30% of all international undergraduate students access Canadian universities (and colleges) through pathways in 2014/15, many of which are offered by Canadian language schools. However, this major and growing recruiting channel is under drastic change pressure.
- **Competition.** Venture capital has flooded into the sector, resulting in (global) buy-outs and consolidation plays. Pathways providers from Australia to the U.S. are increasingly offering their services to Canadian universities, thus upending traditional recruiting models. Trends, such as multi-destination students and online delivery, further increase competition pressures on Canadian providers.
- **Trends.** Canada's international education landscape grew strongly in 2016 and 2017, most likely exceeding 10 % and growth rates. Some of the surges are based on students who typically do not enter pathways programs (e.g. Indian college students), whereas others often do (e.g. Chinese university students). It is a critical question what is happening in the current intake pools.

### Report Sponsoring

- The 2015 Canada Pathways Report was authored by ICG and made available on a commercial basis. By contrast, the 2017 Canada Pathways Report is sponsored by the International Education Division at Global Affairs Canada. This will allow to disseminate the report amongst Canadian stakeholders.

### Report Data (IRCC and Languages Canada)

- The 2015 Canada Pathways Report reflected 2014 IRCC data that was just being changed to a new reporting model. By contrast, the 2017 Canada Pathways Report will reflect 2017 IRCC data with a more full set of data (including colleges).
- Languages Canada is assisting with access to its 2017 member survey (2016 data) which adds another helpful data layer.

**We expect a February 2018 release date**

# COMMENTS ON THE 2017 CANADA PATHWAYS REPORT

## Key Report Components

- **Research Approach and Methodology.** Comments on how to identify and analyze pathways students given that said are typically not classified anywhere as such.
- **A Schematic Overview of Pathways Models in Canada.** An update of the first-ever pathways map for Canada created by ICG in 2015.
- **The Pathways Market in Canada: Current Size and Growth Scenarios.** Based on ICG modeling of students entering colleges and universities from dedicated Canadian pathways programs.
- **A Benchmark Overview of Pathway Programs at Canadian Institutions.** Around 90 pathways programs are currently being benchmarked and will be presented in a standardized format.
- **Strategic Implications for the Canadian Pathways Landscape.** A final chapter discusses the outlook and relevance of pathways programs for the Canadian international education landscape.

# COMMENTS ON THE 2017 CANADA PATHWAYS REPORT

## Key Report Messages

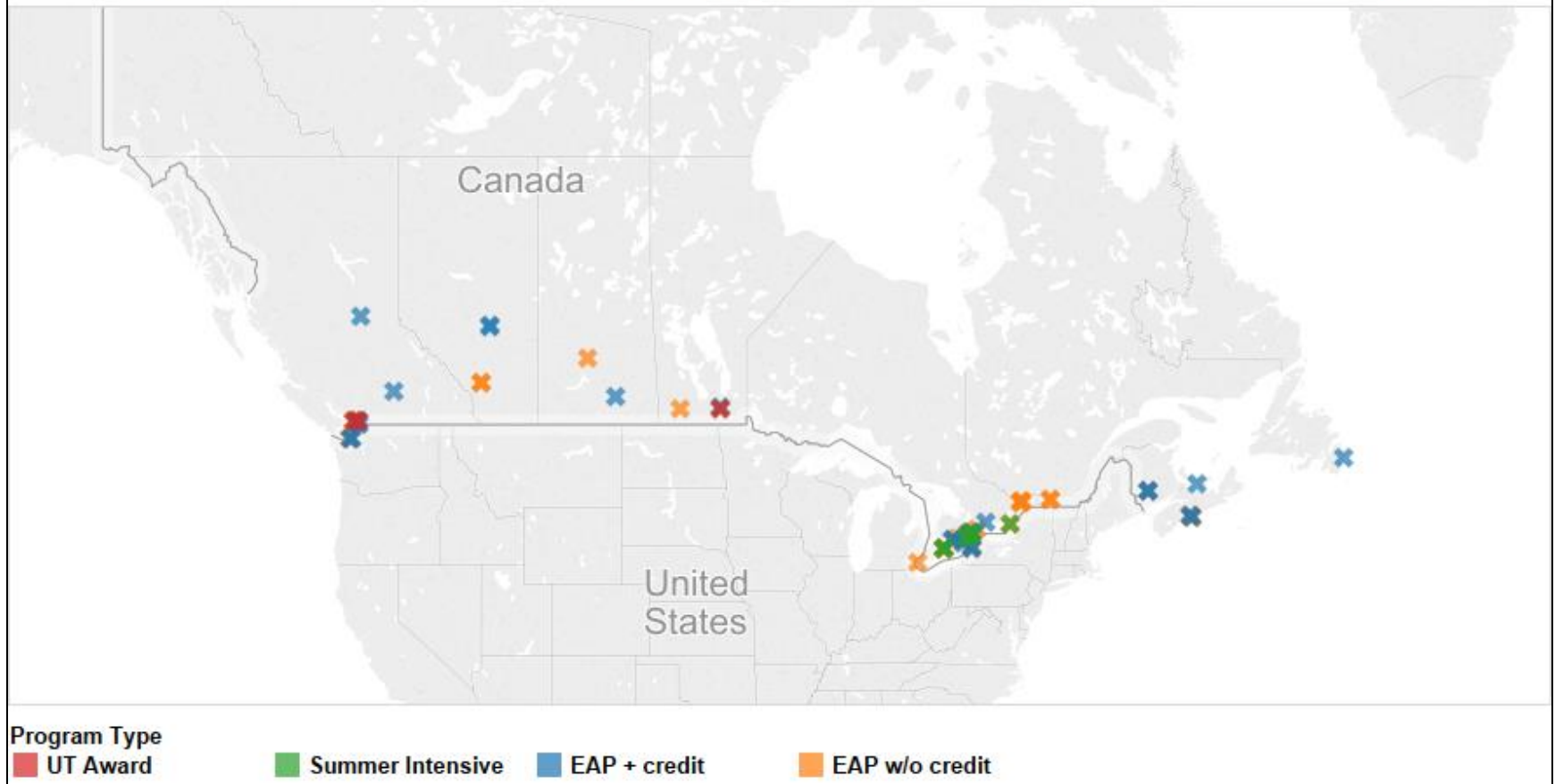
- **Share of Pathways Entrants.** The 2015 report determined that 25-30 % of all first time university international students utilized pathways. It will be critical to understand whether the 2016 and 2017 intake surge has modulated this share (up- or down-ward).
- **Pathways Models.** The Canadian pathways landscape has found to operate in a fragmented and often strictly regional model. Have models such as those run by Langara and CultureWorks become more common?
- **Diversity.** Pathways programs typically rely on a small number of sending countries – with Brazil and Saudi Arabia having compacted notably. What new countries have emerged? Are new countries emerging?
- **A Benchmark Overview of Pathway Programs at Canadian Institutions.** Around 90 pathways programs are currently being benchmarked and will be presented in a standardized format.



# COMMENTS ON THE 2017 CANADA PATHWAYS REPORT

## 2015 Benchmark Program Locations

### Map of Benchmarked Canadian Pathway Programs by Program Type

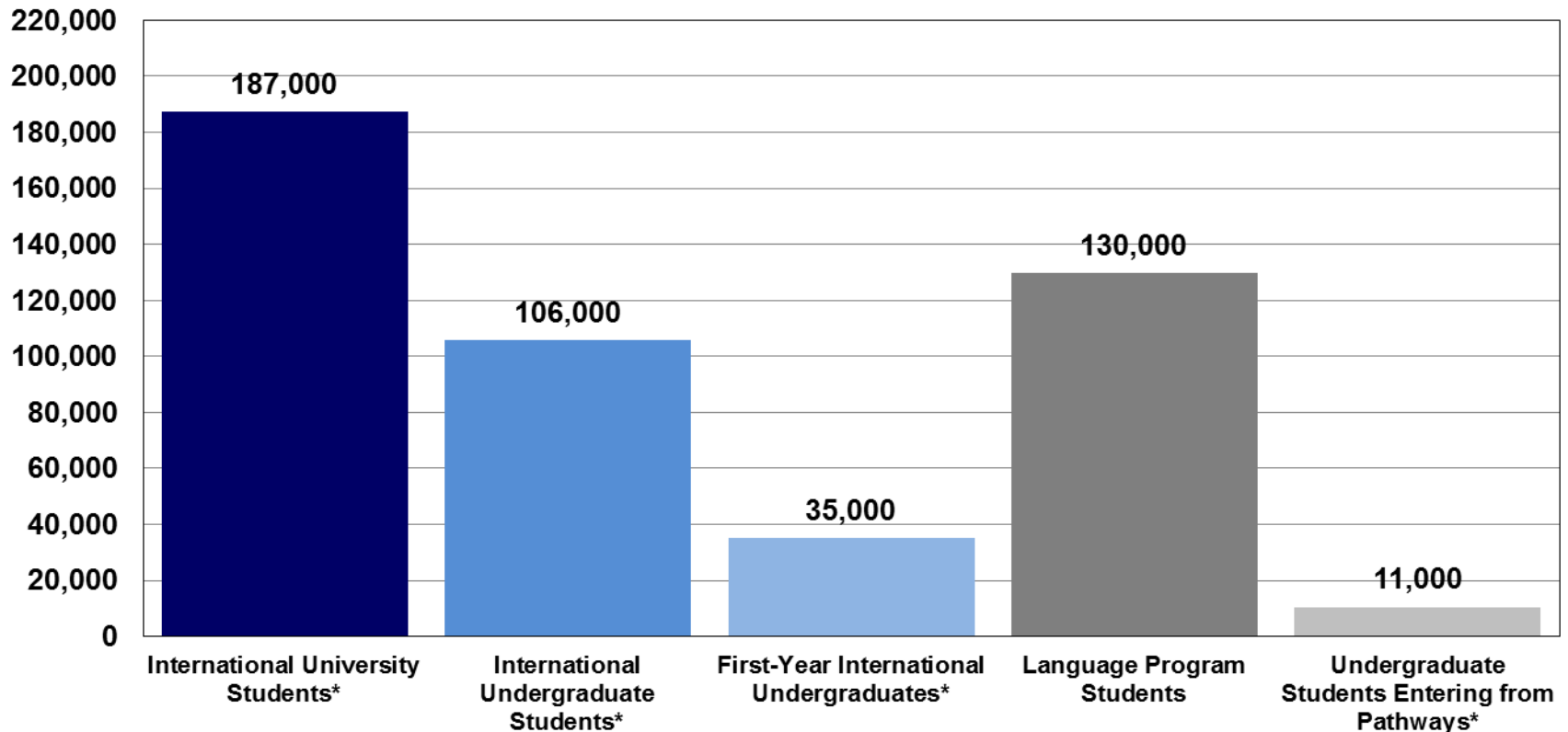


**Award and foundation type programs are strongly underrepresented**

# COMMENTS ON THE 2017 CANADA PATHWAYS REPORT

## 2014-15 Pathways Data

### Canadian Pathway Student Intake Relative to Overall International Student Enrollment (2014-15)



**The 2017 report will update this data set comprehensively**

Notes: \*Estimated. Language program students includes all types of language programs (i.e., broader than U.S. IEP).

Source: CIC, Languages Canada, Statistics Canada, ICG.



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# CASE STUDIES

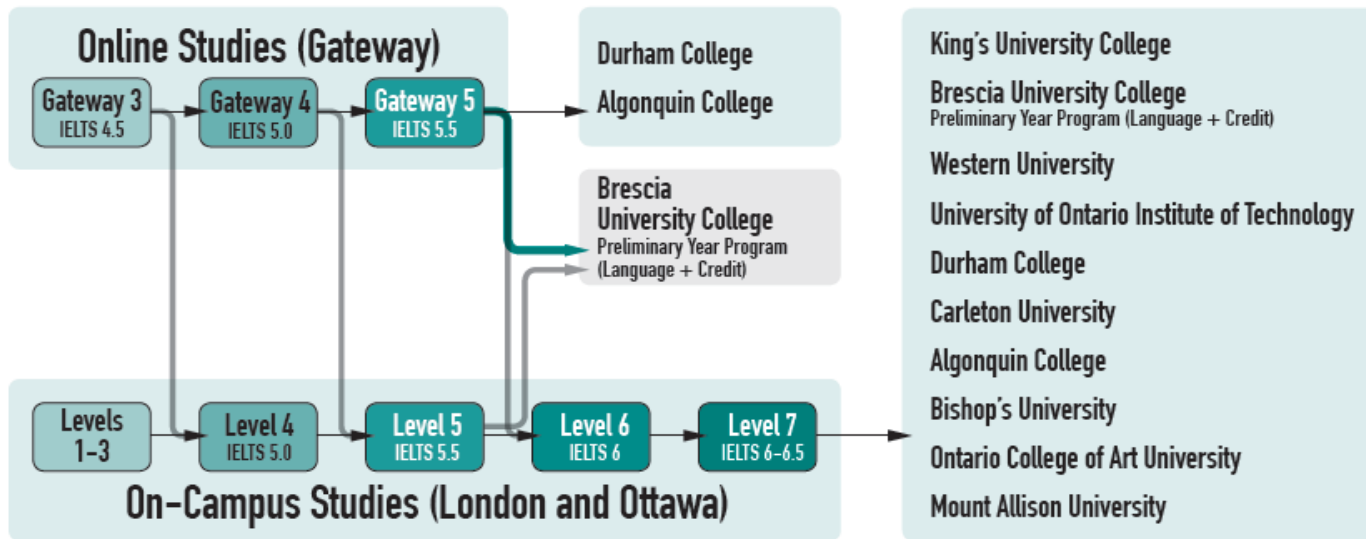
## CultureWorks



**CultureWorks**  
ENGLISH AS A SECOND LANGUAGE INC.



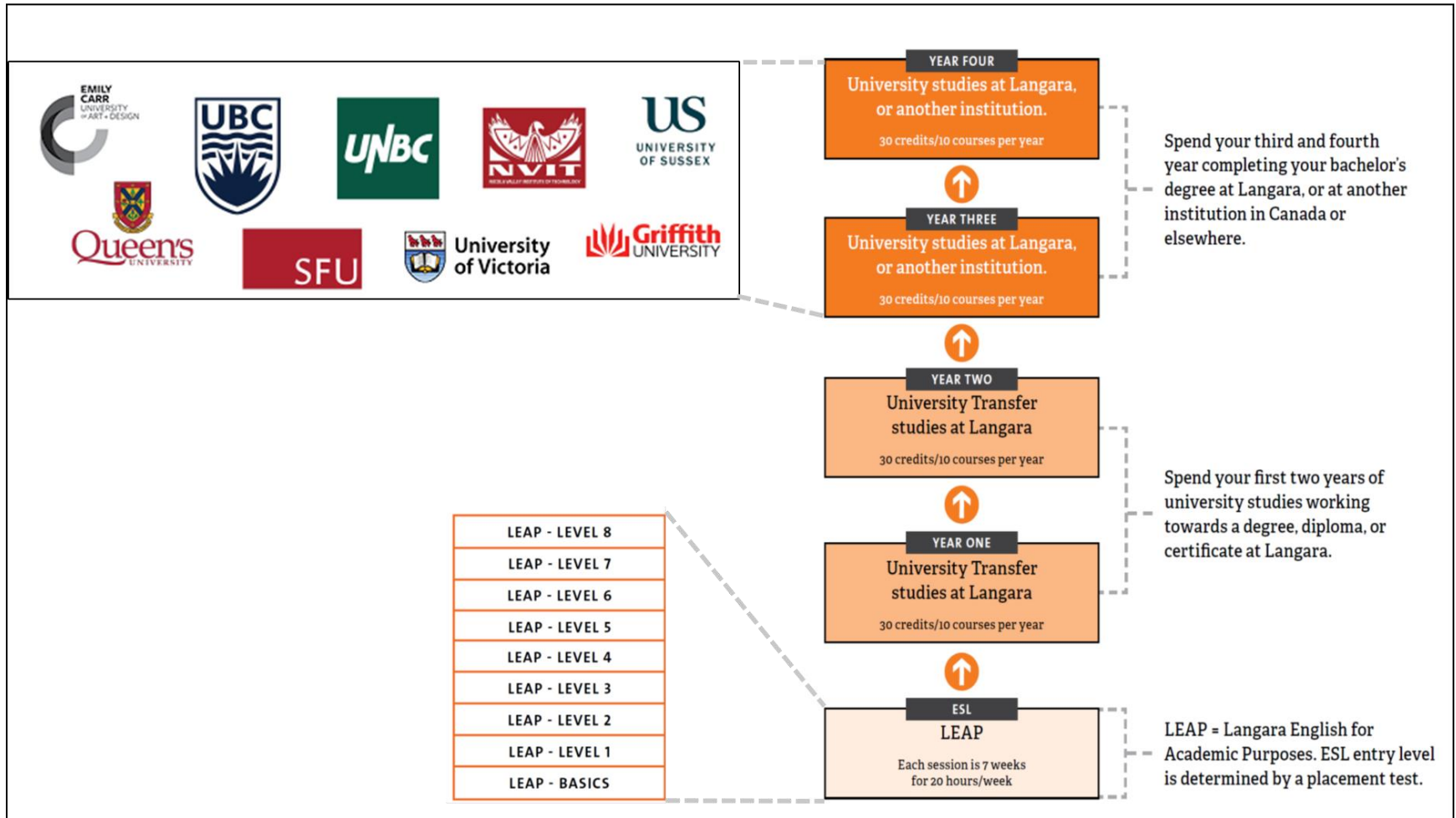
### Online and On-Campus Options



**Student Success Stories:**  
**UNIVERSITY TRANSFER FROM LANGARA COLLEGE**

# CASE STUDIES

## Langara College (II)



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