Pathway & Bridge Program Providers Impacted by Shifting Student Mobility Trends

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Executive Summary

Traditional higher education destinations (the U.S., UK, Canada, and Australia) are seeing reduced student mobility due to visa and immigration restrictions, as well as rising costs. In 2022-23, international student enrollment in the U.S. rose by 11.5%, surpassing 1 million students. Despite this growth, pathway programs remain a niche choice for international students, with many favoring direct admissions or exploring new educational paths such as online and hybrid learning. These shifts reflect changing preferences in study-abroad trends driven by evolving mobility challenges. To remain competitive, pathway and bridge program providers must adapt by:

- Offering Flexible Online and Hybrid Programs: Programs like Shorelight Education's online offerings are currently reaching over 20,000 international students from more than 100 countries, providing flexible pathways for those navigating visa challenges and financial constraints.

- Expanding into Emerging Destinations: Countries like Germany, Malaysia, and Canada offer more favorable policies and affordable living, attracting students who would traditionally have considered only the U.S., UK, or Australia. Kaplan International Pathways, for example, is tapping into these markets with new partnerships.

- Integrating Additional Student Services: With 28% growth in international nondegree students to nearly 44,000 in 2022-23, career counseling and internship placements have become essential, as they add value and appeal to students facing a more complex path to study abroad.

Providers like INTO University Partnerships and Kaplan International Pathways are among those adapting quickly to new market demands, while others risk falling behind.

The Impact of Declining International Student Mobility on Pathway & Bridge Program Providers

The demand for pathway programs has historically mirrored trends in international student flows to top English-speaking education hubs. But as mobility to traditional destinations slows, pathway providers face decreased enrollment from international students seeking alternatives closer to home or in countries with more favorable visa policies.

Key Factors Impacting Demand

Decline in Traditional Markets

Visa policies in the U.S., UK, and Australia have become increasingly restrictive, while the cost of living has surged, making these destinations less attractive. The percentage of students on F Visas for Intensive English Programs (IEPs) in the U.S. dropped from 73% in 2022 to 55% in 2023, indicating barriers to entry.

Competition from New Destinations

Markets traditionally dependent on study-abroad routes to English-speaking countries are now recognizing value in closer, more affordable education options. This shift is pressuring pathway programs to expand into emerging destinations or risk losing market share. For instance, Europe's share of U.S. IEP enrollments grew from 7% in 2015 to 29% in 2023.

Strategic Responses for Pathway & Bridge Program Providers

Developing Online Preparatory Courses

Pathway providers can attract a broader student base by developing virtual preparatory programs that mirror the in-person experience. These online courses should be:

Accessible Globally

Programs that accommodate students from diverse regions, such as Shorelight's fully online programs, allow for broader participation. In 2023, U.S. IEPs enrolled 67,924 students, a 6% increase from 2022, partly driven by flexible learning options.

Localized for Emerging Markets

Courses could include language support or cultural orientation modules for countries like Germany, where students might need tailored preparation.

Partnering with Universities for Guaranteed Admissions

Collaborations with universities worldwide offer pathway programs an edge in attracting students:

Integrated Pathways with Admission Guarantees

Kaplan's UK pathway courses boasted a 91% pass rate in 2023, with 95% of those passing receiving unconditional offers, demonstrating the value of pathways with strong university ties.

Building University Alliances in Emerging Markets

Programs with university partnerships in emerging countries help reduce the risks of reliance on legacy markets. Kaplan's partnerships with universities in Canada and New Zealand offer alternative pathways for students who face restrictive policies in traditional destinations.

Expanding Service Offerings

To add value beyond traditional academic preparation, pathway programs could incorporate:

Career Counselling & Job Placement Services

Programs like INTO have integrated career support and internship services directly into their offerings, appealing to the 102,366 international scholars in the U.S. who seek employability upon completing their studies.

Visa Assistance & Counselling Services

Given the increase in Visitor 'B' visas among IEP students (from 22% in 2022 to 38% in 2023), providing visa guidance is increasingly essential for attracting students who may face complex immigration processes.

Implications for Pathway & Bridge Program Providers: Winners, Adaptors, and At-Risk

Winners

Providers Embracing Digital & Emerging Markets

Programs that adapt swiftly by launching digital learning modules and expanding into emerging markets are positioned to thrive:

Kaplan International Pathways
Kaplan, a well-known name in global education, has diversified its offerings with digital learning options. Their initiatives in Germany and Malaysia, countries with rising international student numbers, provide Kaplan a competitive edge.

INTO University Partnerships
INTO's hybrid programs, which allow students to start online and finish on campuses in emerging destinations, cater to the growing demand for flexible learning paths. INTO's focus on embedding career services directly into pathway programs aligns with the career aspirations of students from Southeast Asia and Latin America.

Shorelight Education
A digital-native provider, Shorelight's fully online pathway programs have enabled students to start and complete their pathways remotely, broadening access for students who face visa challenges in traditional markets.

Status Quo

Traditional Providers Testing New Waters Cautiously

Established pathway programs that experiment with blended online and in-person offerings in non-traditional destinations could hold steady:

Navitas
With a primary focus on the U.S., UK, and Australia, Navitas has started to diversify into Canada and Asia. However, their limited digital offerings could disadvantage them as students increasingly look for flexible learning modes.

Study Group
Study Group has a significant footprint in pathway programs. They recently renewed a partnership with the University of Sheffield, a top 100 global university, reinforcing their in-person academic alliances. However, their prioritization of traditional destinations may limit growth as demand shifts.

Losers
Reliant on Legacy Markets & In-Person Models

Pathway providers that remain focused on traditional destinations may struggle with sustaining enrollment. As visa challenges and rising costs persist, these programs risk losing relevance:

Cambridge Education Group (CEG)

Providing pre-university education to more than 4,000 students from over 95 countries, CEG has recently expanded into the Netherlands, launching a pathway program with Wittenborg University of Applied Science, set to start in September 2025. While this move reflects a positive shift, CEG remains primarily anchored in traditional markets, which may pose challenges amid changing student mobility trends.

Oxford International Education Group (OIEG)

Serving over 50,000 students annually, OIEG has taken steps to expand its reach, including a new partnership with the University of Huddersfield for a London campus. Despite these advancements, their primary focus on the UK and North America, combined with limited digital options, positions OIEG at a disadvantage as students increasingly seek flexibility and remote learning pathways.

Conclusion

The global shift in student mobility presents both challenges and opportunities for pathway and bridge program providers. With over 1 million international students in the U.S. in 2022-23 and emerging study destinations gaining traction, those who quickly adopt digital learning and expand their reach into new markets stand the best chance of maintaining their market share.

Embracing a diversified approach that offers a blend of academic preparation, career services, and support for visa navigation will be crucial for success in this evolving landscape. Providers like Kaplan, INTO, and Shorelight are showing the way forward, while those focused solely on legacy markets and in-person models face mounting risks as student preferences continue to evolve.

Winners in Pathway Programs: Providers Embracing Digital & Emerging Markets

Provider	Strategies & Insights
Kaplan International Pathways	Offers digital learning options and has established partnerships in emerging markets such as Canada and New Zealand. Notably, they have a 91% pass rate in UK pathway courses.
INTO University Partnerships	Provides hybrid programs that combine online and in-person options, integrating career services to enhance student support. These programs are particularly popular in Southeast Asia and Latin America.
Shorelight Education	Provides flexible online and is currently reaching over 20,000 international students from more than 100 countries.
INTI International University & Colleges	A Malaysia-based provider offering a range of programs, including pathway courses. INTI has primarily focused on traditional in-persons and hybrid learning solutions but may benefit from its location in Malaysia.

Status Quo in Pathway Programs: Traditional Providers Testing New Waters Cautiously

Provider	Strategies & Insights
Navitas	Expands into Canada and Asia while developing online learning platforms. Navitas serves over 70,000 students annually and maintains partnerships with universities in emerging markets.
Study Group	Initiates digital projects and collaborates with universities in non-traditional destinations. It recently renewed its partnership with the University of Sheffield.

Losers in Pathway Programs: Reliant on Legacy Markets and In-Person Models

Provider	Strategies & Insights
Cambridge Education Group (CEG)	Primarily offers traditional in-person pathways and has recently expanded into the Netherlands. CEG serves 25,000 students annually and has announced a new partnership with Wittenborg University of Applied Science, set to commence in 2025.
Oxford International Education Group (OIEG)	Focuses mainly on the UK and North America with limited digital offerings. OIEG serves over 50,000 students annually and has partnered with the University of Huddersfield to establish a London campus.
Kings Education	Focuses on in-person pathways in the UK and U.S. with minimal digital offerings. Kings Education serves students aiming for top universities but has shown limited adaptation to online learning.
ELS Educational Services	Concentrates on intensive English programs and is exploring pathway program offerings. In February 2022, ELS Educational Services merged with ILSC Education Group and Berlitz Corporation to form Language Education Holdings (LEH), creating one of the largest language learning and study abroad platforms globally.
Bridge Education Group	Emphasizes English language training and has taken initial steps into pathway programs by establishing partnerships with U.S. universities, though it currently has a limited digital presence.
CATS Colleges	Operates in the UK, USA, and China, offering traditional in-person pathways. While having a global presence, CATS Colleges has been cautious in adopting digital learning platforms and expanding into emerging markets.
Taylors College	Operates in Australia and New Zealand, providing pre-university programs. While Taylors College has been proactive in integrating digital learning solutions, it has yet to expand its partnerships beyond Australia and New Zealand.
Bellerbys College	A UK-based pathway provider that has traditionally focused on in-person instruction. Bellerbys College has been relatively slow to adopt digital learning platforms and expand into emerging markets.
Eynesbury College	An Australia-based provider offering a range of programs, including pathway courses. Eynesbury has traditionally emphasized in-person instruction and has only progressively integrated digital learning solutions.