Supporting & Informing Responses to Change

Panelists:

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Mary Reeves, Executive Director, CEA
The National Landscape: Intensive English Programs Data from Open Doors®

Julie Baer
Research Specialist
IIE Center for Academic Mobility Research and Impact

English USA Stakeholder’s Conference | Friday, October 4, 2019 | Washington, DC
WHAT IS OPEN DOORS?
Open Doors® is produced by the Institute of International Education with the support of the U.S. Department of State’s Bureau of Educational and Cultural Affairs.

- International Student Census
- Study Abroad Survey
- International Scholar Survey
- Intensive English Program Survey
Thank you for 70 years of supporting Open Doors

1919
IIE sent out a questionnaire to higher education institutions collecting international student data

1948/49
IIE began publishing data in Education for One World

1954/55
The publication was expanded and renamed Open Doors

1972
The U.S. Department of State began providing support for IIE’s Open Doors

1978/79
Intensive English Program Survey launched

2018/19
Celebrating 70 years of the Open Doors publication

#OpenDoorsReport  @ELPsintheUSA  #ENGLISHUSA
International Student Census

Only accredited higher education institutions

2017/18 academic year

Intensive English Program Survey

IEPs in higher education and independent providers

2018 calendar year

#OpenDoorsReport  @ELPsintheUSA  #ENGLISHUSA
Intensive English Programs in Higher Education
IEP as a percent of higher education has remained relatively stable

- **2001/02**: 3.6%
- **2005/06**: 3.1%
- **2009/10**: 3.8%
- **2013/14**: 4.9%
- **2017/18**: 2.4%

**Graph:**

- Intensive English students
- All other students
IEP enrollment fluctuates more than overall int’l student enrollment
Intensive English Program Survey
In the 2018 calendar year, IEP enrollment declined but began to level.

78,098 international students at 400 IEPs studied intensive English for 1,057,650 student-weeks in 2018.
World regions varied in their percent change in from 2017 to 2018

- Latin America & Caribbean: +8%
- Asia: -8%
- Europe: -9%
- Overall IEP: -10%
- Middle East & North Africa: -18%
- Sub-Saharan Africa: -21%
Leading places of origin:

- China: 17,700
- Japan: 12,305
- Saudi Arabia: 9,661
- Brazil: 6,154
- South Korea: 5,619
- Taiwan: 2,662
- Mexico: 1,976
- Colombia: 1,837
- Kuwait: 1,833
- Italy: 1,331
The leading places of origin attending IEPs are concentrated

66% of IEP students come from just 5 countries:

- China: 34%
- Japan: 16%
- Saudi Arabia: 12%
- Brazil: 8%
- South Korea: 7%
- All Others: 23%
The leading place of origin has shifted over the past five years

- **Saudi Arabia**: 30% (2013) → 23% (2018)
- **China**: 14% (2013) → 16% (2018)
- **Japan**: 9% (2013) → 12% (2018)
- **Brazil**: 7% (2013) → 8% (2018)
- **South Korea**: 7% (2013) → 7% (2018)
The average IEP weeks per student varies by world regions.

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The majority of IEPs represented are affiliated with higher education institutions.

- 65% Governed by college or university
- 19% Independent provider affiliated with HEI
- 10% Independent provider not affiliated with HEI
- 6% Unknown
The number of reporting IEPs has grown over the past twenty years.

- 1999: 158 programs
  - Governed by college or university: 82
  - Independent provider affiliated with HEI: 46
  - Independent provider not affiliated with HEI: 30
  - Unknown: 0

- 2008: 162 programs
  - Governed by college or university: 76
  - Independent provider affiliated with HEI: 65
  - Independent provider not affiliated with HEI: 21
  - Unknown: 0

- 2018: 400 programs
  - Governed by college or university: 262
  - Independent provider affiliated with HEI: 77
  - Independent provider not affiliated with HEI: 38
  - Unknown: 23

#OpenDoorsReport  @ELPsintheUSA  #ENGLISHUSA
The majority of students are full time students

- **National Average**:
  - Full Time (≥ 18 contact hours): 72%
  - Part Time (< 18 contact hours): 28%

- **College or University**:
  - Full Time (≥ 18 contact hours): 78%
  - Part Time (< 18 contact hours): 22%

- **Independent Provider Affiliated with HEI**:
  - Full Time (≥ 18 contact hours): 66%
  - Part Time (< 18 contact hours): 34%

- **Independent Provider Not Affiliated with HEI**:
  - Full Time (≥ 18 contact hours): 52%
  - Part Time (< 18 contact hours): 48%
2018 had the highest proportion of part-time students in the past decade.
Average IEP weeks varies by institutional type and enrollment status

- **College or University**: 16 weeks
- **Independent Provider Affiliated with HEI**: 18 weeks
- **Independent Provider **<u>Not** Affiliated with HEI**: 12 weeks

*Full Time (≥ 18 contact hours)*
TRENDS FROM ACCET’S PERSPECTIVE

1. Changes in program offerings
2. Changes in ownership
3. Changes in sites
4. Changes in students served
ACCET OVERVIEW – 724 SITES

What programs are IEP’s offering? We’ll break this down shortly.

- IEP (252)
- Vocational (272)
- Avocational (200)
CHANGES AT ACCET INSTITUTIONS – (2017 – 2019)

• New institutions – 32 Total/3 IEPs
• New branches – 32 Total/13 IEPs
• Changes of ownership – 11 Total/7 IEPs
• Closed branches – 54 Total/42 IEPs
STRATEGIES TO SURVIVE & THRIVE

• Modifying and establishing new programs
• Closing sites and establishing new ones
• Changing ownership
• Shifting target markets and reliance on agents
APPROVED PROGRAMS

- Intensive/General/ESL – 327
- TOEFL/TOEIC/IELTS/Cambridge – 123
- Academic/University/Pathways – 74
- Part-time/Semi-Intensive – 59
- Private/Individual/Small Group – 51
- English and/English for – 24
- TEFL/TESOL/CELTA - 24
- Vacation/Tourist - 10

Limitations: overlap in program titles
PROGRAM TRENDS

• Increase in applications for program modifications and new programs

• Different types of programs

2017 saw 37 applications for new programs and program modifications. **2018 saw 53**, and 2019 is up to 34 applications!

*Business English, English for Families, English for Entrepreneurs... and more!*
PROGRAM TRENDS

- Shorter programs and shorter terms
- More English + themes and niche programs
- More English for vacationer programs
- More Business English programs
- Increase in teacher-training programs
- Varying schedules
- Discontinuation of longer, more academic programs
- Some change with Pathway/University program
CHANGES OF OWNERSHIP
(2016 – 2019)

• Internal ownership changes

• Changes of ownership due to retirement

• Acquisitions to expand market and/or eliminate competition

• Acquisition by international investors to enter US market
OTHER CHANGES

• Changes in use of agents
• Shift in students’ nations of origin
• IEP echo – 2nd and 3rd reaccreditation process
CEA Trends and Data

EnglishUSA Stakeholders Conference
October 2019
Still growing . . .
Applications . . . Still coming in

29
27
11

67 total

2019

Programs
Institutions
General
Number of new applications

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New applicants completing initial accreditation
### Expiration, Closure, Withdrawal

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#### Reasons
- Nonrenewal of contracts
- Low enrollments
- Closing => opening in new market
- Loss of eligibility
- Diminished administrative support
- Retirements / consolidations
- Other
Enrollment decreases

- 60% of sites report a decrease in enrollment
- half of these report a decrease of more than 20%

- political climate, perceptions of the US, and visa denials
- loss of SEVP certification
- local environmental crisis
- revisions to the financial guarantees for scholarship students
- personnel problems at school, incl. organizational change, absent leadership, weak marketing
- university focusing its overall recruiting efforts on English-speaking countries or on the local market
- increased fees as a result of accreditation
Enrollment increases

- 40% of sites report increased enrollment
- half of these report an increase of more than 20%

- initial SEVP certification and the ability to enroll full-time international students
- influx of transfer-in students from local schools that closed
- new partnerships (e.g. state for vouchers for part-time students; contracts for ESP courses)
- serving immigrants, resident, or other local populations
- addition of delivery blocks, e.g. summer sessions, evening classes
- robust marketing efforts, focusing on the countries where fewer visas get denied
- recovering from a deep drop in 2017
Standards Compliance . . .
(N=197 2013-2014)
Improving!
(N=203 2015-2018)
Pass rates, improving too!

- **2014, 2015:** 59% report 80% or higher pass rates
- **2016, 2017, 2018:** 67% report 80% or higher pass rates

- Additional academic counseling, summer tutorials, early intervention for struggling students, proactive academic advising
- Free tutoring
- Norming sessions, mentoring, in-house training for faculty
- Regular review of curricular elements
- Revised assessment instruments
- Hired an instructor with a specialization in teaching low-proficiency classes
- Positive changes in student profile due to stricter requirements of scholarship agencies
- Increasing instructional time per level
Reported responses to trends

Reactive

• faculty and personnel layoffs
• relocation/reduction in leased space
• combined/levels fewer elective courses
• scaling down extracurricular activities
• larger classes/fewer sections
• discounts/enrollment incentives

Proactive

• new partnerships (with other universities as well as with departments within the university), applying for grants
• increasing local marketing efforts
• adding student activities
• new test-preparation courses
• new revenue-generating programs (teacher training, short-term courses, summer youth programs, and custom programs)
• hiring full-time marketing personnel
• adding new agents
• adding new locations
Other observations

• Different responses: programs and institutions
  o Changes of control vs changes of ownership

• Successful planning for the post-downturn era
  o When do reactive strategies go to far?
  o Are proactive strategies scalable / sustainable when the market comes back?

• Actual redefinition or restructuring of the IEP / ELP?

• Responding to deep change?