Intensive English Programs: Industry, Enrollment, and Market Trends

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Gabriela Zelaya, Global Education Team Leader, US Department of Commerce

2019 NAFSA Conference, Washington, DC, May 30
About EnglishUSA

**Mission:** To represent and support English language programs in the United States (revised January 2019)

**Vision:** To be the recognized voice of English language programs in the United States (revised January 2019)
What We’ll Cover

• Membership / Who We Serve
• Industry Trends
• Organization Initiatives
• Association Data
Membership

400+ member programs in 48 states & D.C.

33 Associates in 9 different industries

6 program types in various settings across the country

Multiple opportunities for volunteer engagement

Over 1,000 online individual profiles

4 dedicated EnglishUSA live events, 12 webinars, and 14+ presentations offered annually

4 strategic partnerships

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4 dedicated EnglishUSA live events, 12 webinars, and 14+ presentations offered annually

4 strategic partnerships

Multiple opportunities for volunteer engagement

6 program types in various settings across the country

33 Associates in 9 different industries

400+ member programs in 48 states & D.C.

Over 1,000 online individual profiles
Types of Member Programs

- Community college owned and governed program, 59%
- Proprietary multi-site situated on campus, 14%
- Proprietary multi-site stand-alone program, 14%
- Proprietary, independent program situated on campus, 9%
- Proprietary, independent single stand-alone program, 1%
- Joint partnerships (third-party providers), 1%
- University/College owned and governed program, 2%
Trends We’re Seeing

- SEVP wait times
- Multi-level classes
- Pathway program development
- Short-term program development
- Increased competition with other English-speaking countries
- Negative perception of US
- Unstable political climate
- Government policy proposals
- In-country English & online learning
- Program budget cuts
- Mergers, acquisitions and closures

Initiatives

- Conferences, webinars, panels, member experts and invited guests
- Outreach (branding overseas), media partners
- Advocacy, collaborative efforts with other organizations
- Continuous evaluation of mission, vision, bylaws and governance to address the trends
Member Program Data
Types of Member Programs

- Community college owned and governed program, 59%
- Proprietary multi-site situated on campus, 14%
- Proprietary multi-site stand-alone program, 14%
- Proprietary, independent program situated on campus, 1%
- Proprietary, independent single stand-alone program, 9%
- University/College owned and governed program, 2%
Proprietary & University/College- Governed Membership Breakdown

- Proprietary (multi, independent)
- University/College-Governed
Regions (member locations)

- Midwest: 20%
- Northeast: 21%
- Southeast: 23%
- Southwest: 6%
- West: 29%

Total: 100%
Accreditations Held by Members

- 28% ACCET
- 20% Regional + CEA
- 37% Regional Only
- 15% CEA Only
Enrollment Volumes (% of EnglishUSA programs)

**Fall**
- 101-250: 26%
- 25-50: 17%
- 51-100: 36%
- Fewer than 25: 11%
- More than 251: 10%

**Spring**
- 101-250: 24%
- 25-50: 8%
- 51-100: 36%
- Fewer than 25: 12%
- More than 251: 20%
Summer Enrollments

Proprietary
- Fewer than 25: 4%
- 25-50: 10%
- 51-100: 12%
- 101-250: 32%
- More than 251: 42%

University/College
- Fewer than 25: 5%
- 25-50: 32%
- 51-100: 27%
- 101-250: 14%
- More than 251: 22%
Junior programs offered

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<th>University/College/CC Governed</th>
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<td>n=75</td>
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<td>n=89</td>
<td>n=160</td>
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Length of Terms

Fall and Spring Term Lengths

Summer Term Lengths
Part-time study allowed in member programs

- No: 14%
- Yes: 86%
Member programs running pathways

- Pathway launched and running: 49%
- In development or awaiting SEVP approval: 17%
- None (includes Stand-alone proprietary IEPs): 34%

17%
49%
34%
Pathway program types (launched or submitted to SEVP)

- In-House Developed Pathway Program: 79%
- No response: 10%
- Third-Party Pathway Program Provider: 11%
Upcoming Conferences & Events

May 29, 2019
Annual Meeting & Networking Reception, Washington, DC

May 29, 2019
Call for Proposals open in June

June 12, 2019
Virtual Office Hour for EnglishUSA Membership Questions

November 18-23
Certified Trade Mission to Brazil & Colombia

August 30
Annual Meeting: Global Alliance of English Language Associations
Open Doors® Intensive English Programs

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

NAFSA | Thursday, May 30, 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.
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

2018/19
Celebrating 70 years of the Open Doors publication
International Student Census

Only accredited higher education institutions

2017/18 academic year

Intensive English Program Survey

IEPs in higher education and independent providers

January 2018 – December 2018
Intensive English Programs in Higher Education
Percent of Intensive English Enrollment in Higher Education

- Intensive English students
- All other students

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<thead>
<tr>
<th>Year</th>
<th>Intensive English</th>
<th>All Other Students</th>
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</thead>
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<td>2001/02</td>
<td>3.6%</td>
<td>600,000</td>
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<td>2005/06</td>
<td>3.1%</td>
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<td>2009/10</td>
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<td>2013/14</td>
<td>4.9%</td>
<td>1,000,000</td>
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<tr>
<td>2017/18</td>
<td>2.4%</td>
<td>1,200,000</td>
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</table>
IEP enrollment fluctuates more than overall int’l student enrollment

% Change - IEP

% Change – All Int’l Students

-30
-20
-10
0
10
20
30
40

2001/02  2005/06  2009/10  2013/14  2017/18
Intensive English Program Survey
International Intensive English Enrollments

78,098 international students at 400 IEPs studied intensive English for 1,057,650 student-weeks in 2018.

Students: -10.0% Growth Rate (2017-2018)

Student Weeks: -13.7% Growth Rate (2017-2018)
Percent Change in IEP 2017 to 2018

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<th>Region</th>
<th>Change</th>
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<td>Europe</td>
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<tr>
<td>Overall IEP</td>
<td>-10</td>
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<tr>
<td>Middle East &amp; North Africa</td>
<td>-18</td>
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<tr>
<td>Sub-Saharan Africa</td>
<td>-21</td>
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Top Ten 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
IEP top places of origin

66% of IEP students come from just 5 countries.

- China: 34%
- Japan: 16%
- Saudi Arabia: 12%
- Brazil: 8%
- South Korea: 7%
- All Others: 23%
Top 5 Places of Origin – Percent of Total 5 Year Comparison

<table>
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<tr>
<th>Country</th>
<th>% of Total 2013</th>
<th>% of Total 2018</th>
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<tr>
<td>Saudi Arabia</td>
<td>30%</td>
<td>23%</td>
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<td>China</td>
<td>14%</td>
<td>16%</td>
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<td>Japan</td>
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<tr>
<td>Brazil</td>
<td>7%</td>
<td>8%</td>
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<tr>
<td>South Korea</td>
<td>7%</td>
<td>7%</td>
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</table>
Top 5 Places of Origin 5 Year Comparison

2016 - Saudi Arabia announces changes to the scholarship program
Top 5 Places of Origin 5 Year Comparison

China

Japan

South Korea
Top 5 Places of Origin 5 Year Comparison

Brazil

2015 – Brazil suspends new applications to scholarship program.
Top 5 Places of Origin 5 Year Comparison

- China
- Japan
- Saudi Arabia
- Brazil
- South Korea

Graph showing the number of students from each country over the years 2012 to 2018.
Types of intensive English programs

Governed by college or university: 65%
Independent provider affiliated with HEI: 19%
Independent provider not affiliated with HEI: 10%
Unknown: 6%
Average IEP weeks per student

- Middle East and North Africa
- Sub-Saharan Africa
- Asia
- Latin America and Caribbean
- Europe
- World

<table>
<thead>
<tr>
<th>Year</th>
<th>Middle East and North Africa</th>
<th>Sub-Saharan Africa</th>
<th>Asia</th>
<th>Latin America and Caribbean</th>
<th>Europe</th>
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</table>
Average IEP weeks per student

- World: 13.5
- Europe: 9
- Latin America and Caribbean: 9.5
- Asia: 13.9
- Sub-Saharan Africa: 15.9
- Middle East and North Africa: 19.2
## Average IEP weeks by institutional type and enrollment status

<table>
<thead>
<tr>
<th>Institutional Type</th>
<th>Full Time (≥ 18 contact hours)</th>
<th>Part Time (&lt; 18 contact hours)</th>
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<td>College or University</td>
<td>16</td>
<td>9</td>
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<tr>
<td>Independent Provider</td>
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<tr>
<td>Affiliated with HEI</td>
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<td>8</td>
</tr>
<tr>
<td>Not Affiliated with HEI</td>
<td>12</td>
<td>6</td>
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</tbody>
</table>

- Full Time (≥ 18 contact hours)
- Part Time (< 18 contact hours)
Additional Resources
Intensive English USA Directory

- Print directory with comprehensive program information
- Listed alphabetically by U.S. state
- Order at iiebooks.org
Intensive English Programs: Industry, Enrollment and Trends

Gabriela Zelaya, Global Education Team Leader, San Jose, CA
U.S. Department of Commerce | International Trade Administration | U.S. Commercial Service
# Economic Impact of International Education

## 2018 U.S. Exports of Services

<table>
<thead>
<tr>
<th>Services</th>
<th>2018</th>
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<tbody>
<tr>
<td>1 Personal Travel (Other)</td>
<td>$125.9 Billion (USD)</td>
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<tr>
<td>2 Professional and Management Consulting Services (Business Services)</td>
<td>$87.8 Billion (USD)</td>
</tr>
<tr>
<td>3 Financial Management (Financial Services)</td>
<td>$53.4 Billion</td>
</tr>
<tr>
<td>4 Use of IP for Industrial Processes</td>
<td>$46.0 Billion (USD)</td>
</tr>
<tr>
<td>5 Education-related (Personal Travel)</td>
<td>$45.3 Billion (USD)</td>
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</table>

Bureau of Economic Analysis: [https://www.bea.gov/iTable/iTable.cfm?ReqID=62&step=1#reqid=62&step=6&isuri=1&6210=4&6200=245](https://www.bea.gov/iTable/iTable.cfm?ReqID=62&step=1#reqid=62&step=6&isuri=1&6210=4&6200=245)
Highlights:
• Education - a high priority
• Internationalization of higher education at public and private institutions; i.e. international research partnerships
• Availability of English language programs at Brazilian universities is limited, but increasing
• Ministry of Education in early stages of creating a system to recognize foreign university degrees

Opportunities:
• Programs providing conditional acceptance tied to English language training
• Student exchange programs (1-2 years) for undergraduates and graduate students
• Short-term and part-time programs combined with tourism and outdoor sports; teen vacation with classes and leisure activities; and English language programs designed for 50+ yr. old students
• Fastest growing area for the next decade are short-term vocational and English learning courses

Education Commercial Specialist in Brazil: Laura Reffatti, Laura.Reffatti@trade.gov
Market Trends: Colombia

Highlights:
U.S. remains preferred study destination:
• Higher employment opportunities after graduation
• Seek high quality education and to improve English language skills
• Colombia “Very Well” - Government initiative to increase English language skills
• Scholarship programs with ICETEX and COLFUTURO
• Colombian businesses increasing presence and operations in the U.S. are requiring English language skills, living experience in the U.S., and knowledge of U.S. business practices and American culture

Opportunities:
• 3-week to 4-month English language training programs
• Dual - degree exchange programs sought after by Colombian universities with U.S. universities
• Demand is focused on business administration, management, finance, banking, marketing, and engineering

Education Commercial Specialist in Colombia: Julio Acero, julio.acero@trade.gov
Market Trends: Japan

Highlights:
• Interest in English rising with 2020 Olympics
• Prime Minister Abe - double bilateral exchanges by 2020
• Online English language training growing in demand

Best Prospects to increase enrollments:
• Bridge/Pathway programs from ESL classes directly into universities
• Short term intensive ESL programs with internship
• **Short term programs match with Japanese academic calendar**
• Programs with relaxed TOEFL score requirements
• Service learning and/or volunteer activities to gain resume enhancing experience
• Tailored short term programs with airport transfers, lodging and logistics all included

Education Commercial Specialists in Japan:
Kazuko Tsurumachi, Kazako.Tsurumachi@trade.gov
Tetsuko Fujioka, Tetsuko.Fujioka@trade.gov
**Highlights:**

- Taking a lead role on international education – fostering student mobility and academic exchanges abroad to become competitive in international market
- FOBESII established in 2014– goal to expand opportunities for education exchanges, scientific research partnerships, and cross-border innovation between U.S. and Mexico
- Secretariat of Education and private educational institutions are investing in equipment and technology solutions in English, to improve the education experience at all levels

**Opportunities:**

- ESL programs for students – short term and long-term courses to address Mexico’s shortage of English language teachers
- Participating in student fairs, building relationships with partners, schools, and grant institutions is key
- Recruiting in secondary markets – students from smaller geographic regions are growing and looking for quality education abroad

**Education Commercial Specialists in Mexico:** Martha Sanchez, [martha.sanchez@trade.gov](mailto:martha.sanchez@trade.gov)
Highlights:
• Overseas education has become a standard for South Korean parents
• Increasingly sophisticated, demanding, and brand oriented market
• Experiencing demographic declines and recent economic fluctuations
• Increased options to learn English at home and regionally
• Demand for online English language training is limited

U.S. Programs of Study for South Korean Students:
• More diversified, i.e. STEM, Business Management; Fine and Applied Arts
• Study at private boarding schools to learn English at an early age with goal to enter U.S. universities

Opportunities:
• English language training, internships, or degrees from mid-ranked State schools that lead to full-time job opportunities in S. Korea

Education Commercial Specialists in South Korea: Young Hee Koo, younghee.koo@trade.gov
Market Trends: Taiwan

Highlights:
• In 2016, Taiwan’s Ministry of Education implemented Higher Education Innovation and Transformation Task Force supporting:
  ➢ Exchange programs between domestic and foreign universities
• In 2018, Taiwan set forth initiative to make English the official second language
  ➢ Strengthening children’s English ability from primary to middle school
  ➢ Yushan Project – attract and retain top talent domestically and from abroad
• Competition not only from English speaking countries, but also Hong Kong, China, and Singapore have stepped up recruitment efforts for Taiwanese students
• Increase in number of bilingual international schools to prepare students to study abroad

Opportunities:
• Degree, Certificate, and English language programs
• Emphasize affordability and post-graduation job placement
• Student/scholar exchange programs and joint degree program partnerships

Education Commercial Specialist in Taiwan: Grace Tao, grace.tao@trade.gov
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<th>Country</th>
<th>High School</th>
<th>Boarding Schools</th>
<th>Community College</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Law School</th>
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### BEST STUDENT RECRUITMENT METHODS

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Certified Trade Mission for Intensive English Programs
Colombia & Brazil November 18-23, 2019

The U.S. & Foreign Commercial Service and EnglishUSA, in coordination with EducationUSA, have collaborated to organize a Certified Trade Mission (CTM) for intensive English programs (IEPs) to Colombia and Brazil. The purpose of the CTM is to introduce IEPs to the rapidly expanding education sectors in these two countries.
Upcoming IEP CTM - Join Us!

Certified Trade Mission for Intensive English Programs
Colombia & Brazil November 18-23, 2019

✓ Education Market Briefings with U.S. Government Officials
✓ Meetings and Networking with Recruitment Partners, Business Community, and Foreign Government Officials
✓ Meet with Students during Education Fairs in Colombia and Brazil
Upcoming IEP CTM - Join Us!

Certified Trade Mission for Intensive English Programs
Colombia & Brazil November 18-23, 2019

➢ Arrive in Bogota (Colombia) - November 17
➢ Bogota (Colombia) - November 18
➢ Baranquilla (Colombia) - November 19
➢ Travel Day - November 20
➢ Belo Horizonte (Brazil) - November 21
➢ Rio de Janeiro (Brazil) - November 22-23
➢ Depart Rio de Janeiro (Brazil) - November 23 or 24

Estimated Cost $4,200

*More information to be posted on http://www.englishusa.org in early June
THANK YOU VERY MUCH!

Gabriela Zelaya

gabriela.Zelaya@trade.gov
Please complete this session evaluation NOW!

Or FAVORITE now and EVALUATE later!