



Intensive English Programs: Industry, Enrollment, and Market Trends

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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

the American Association of
Intensive English Programs

Membership

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



33 Associates
in **9** different
industries



Over 1,000 online
individual profiles



6 program
types in various
settings across
the country



Multiple
opportunities for
volunteer
engagement



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



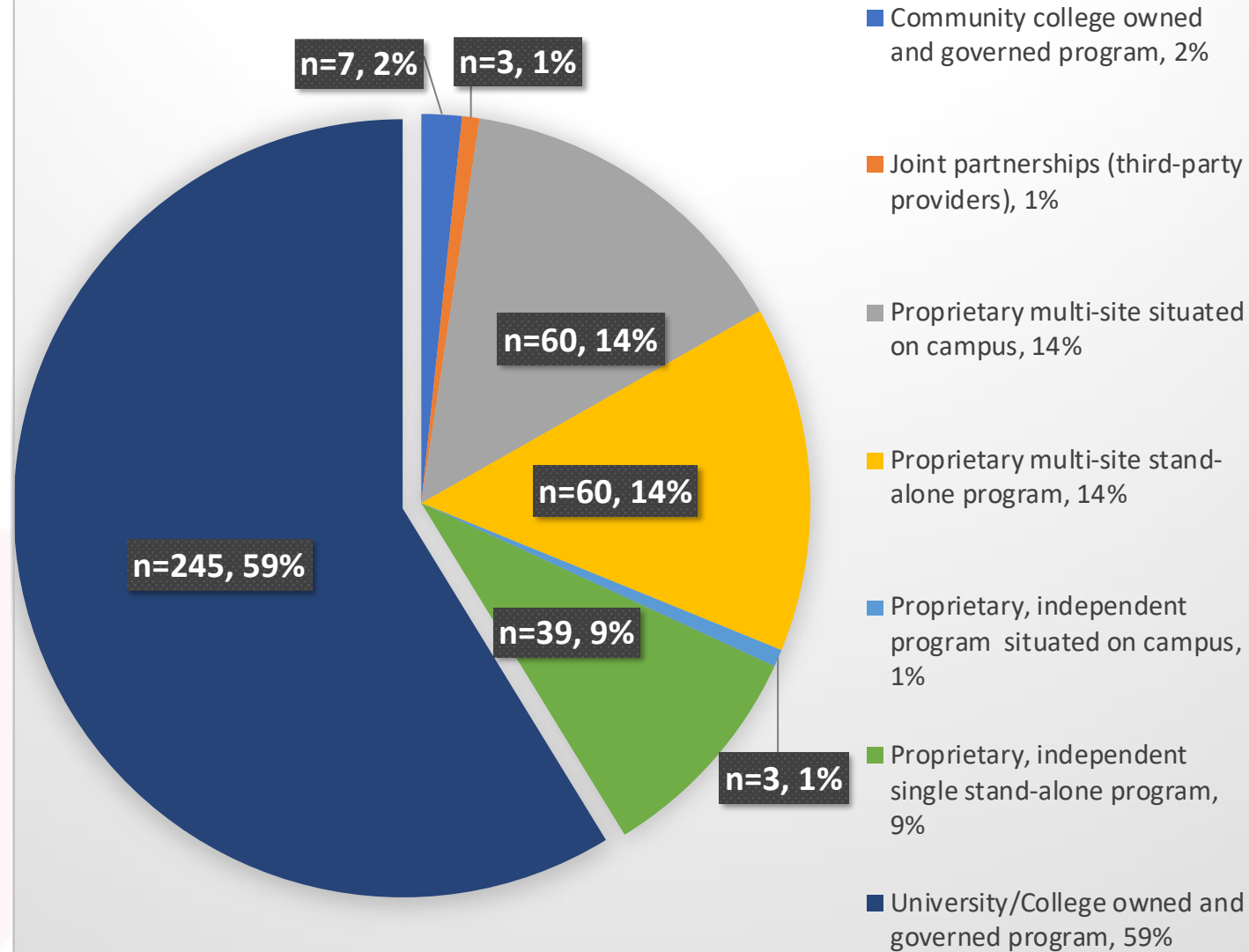
THE PIE
Professionals in International Education



**4 strategic
partnerships**



studentmarketing



Types of Member Programs

American Association of
English Programs

EnglishUSA Associates



PEARSON

CaMLA



PTE ACADEMIC™



IELTS™



Cambridge
Assessment



CAMBRIDGE
UNIVERSITY PRESS

OXFORD
UNIVERSITY PRESS



MICHIGAN
LANGUAGE ASSESSMENT



American Voices

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

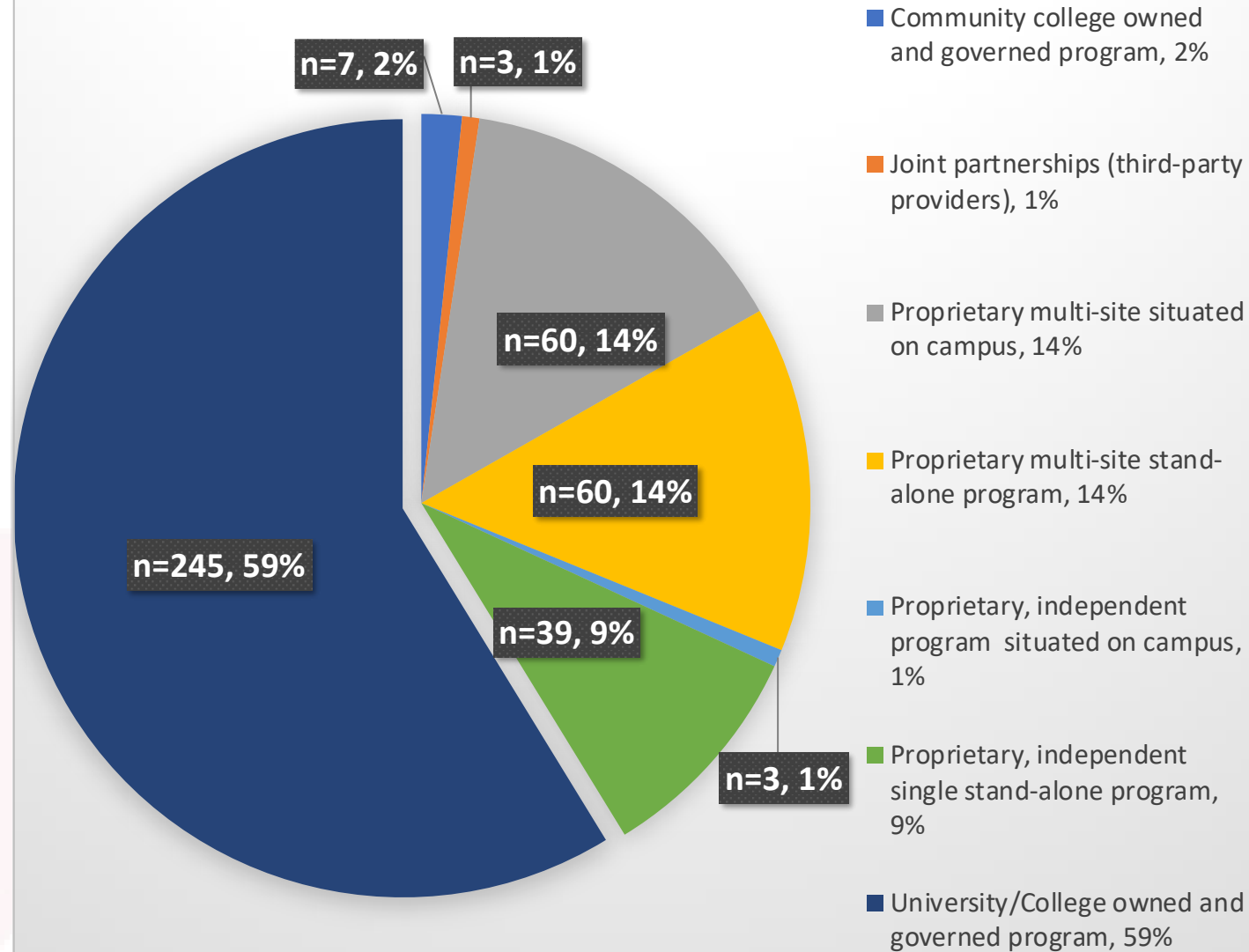
Advocacy, collaborative efforts with other organizations

Continuous evaluation of mission, vision, bylaws and governance to address the trends

Member Program Data



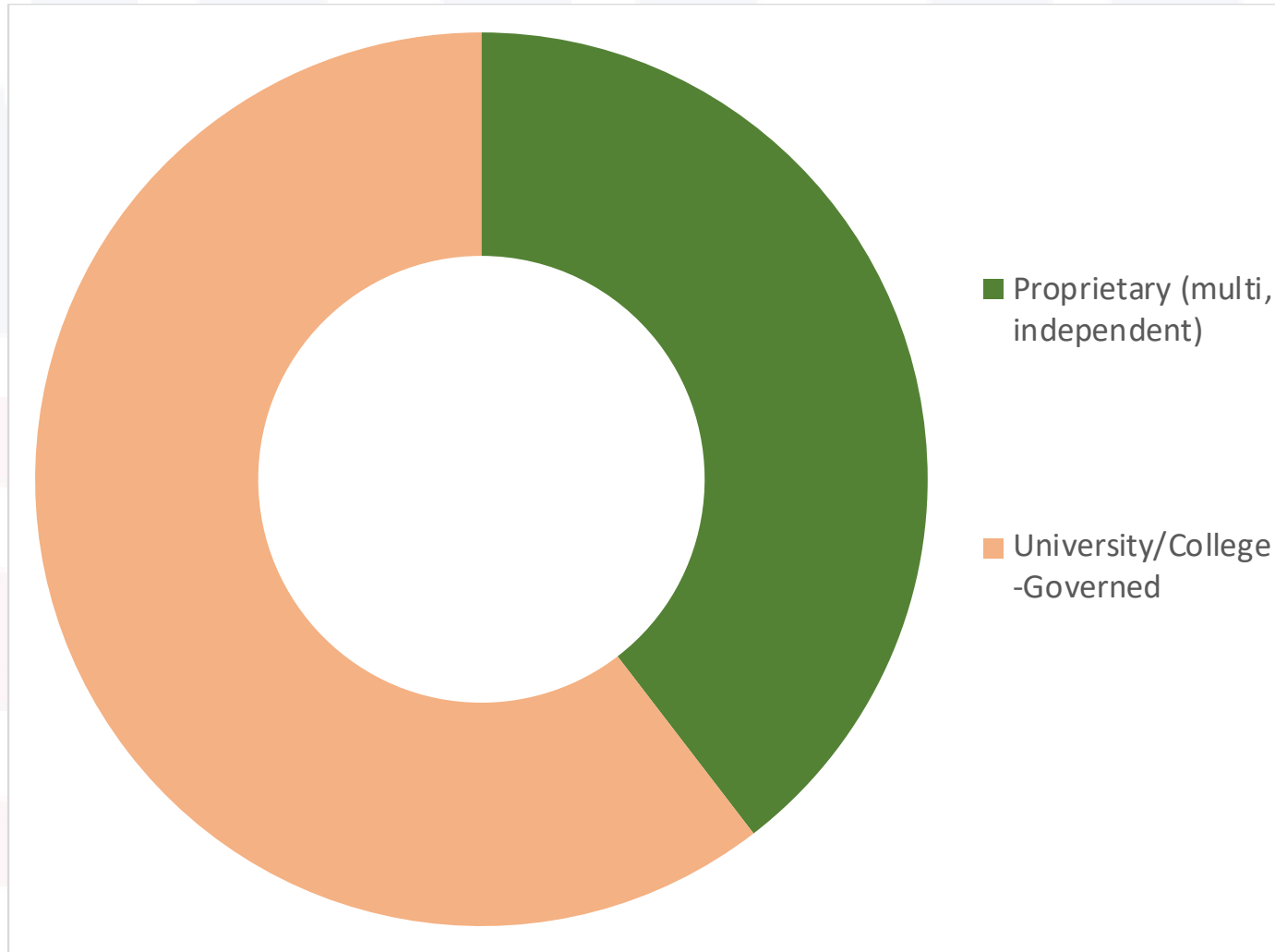
Association of
English Programs



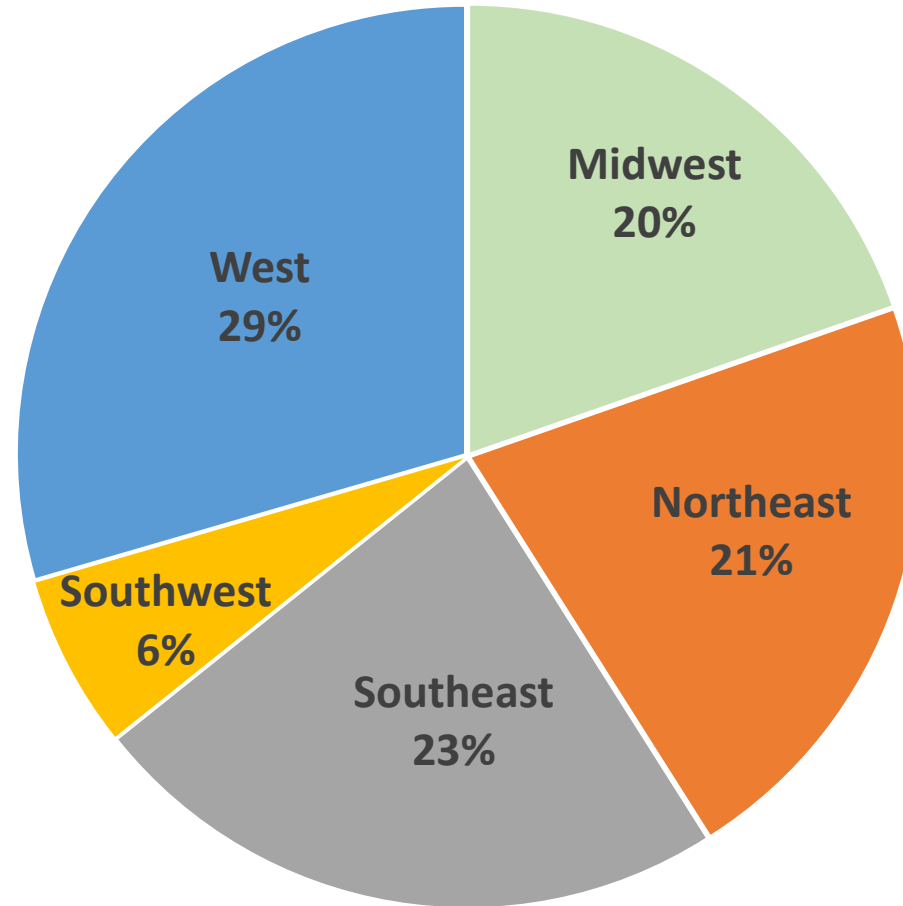
Types of Member Programs

American Association of
English Programs

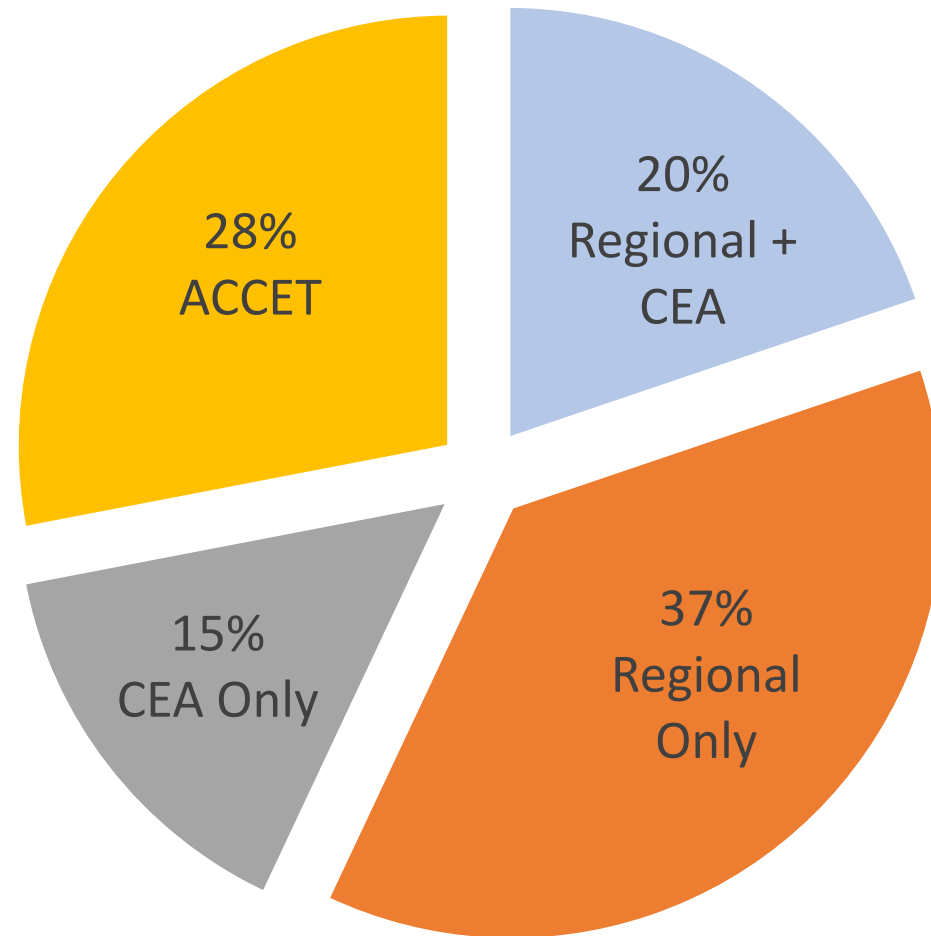
Proprietary & University/College- Governed Membership Breakdown



Regions (member locations)

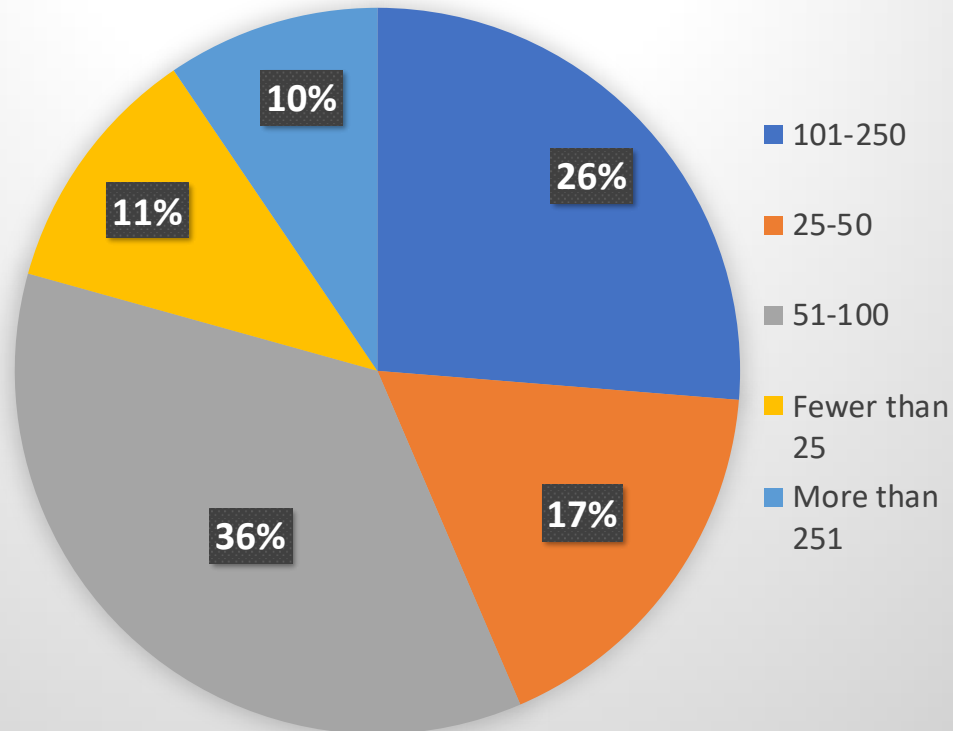


Accreditations Held by Members

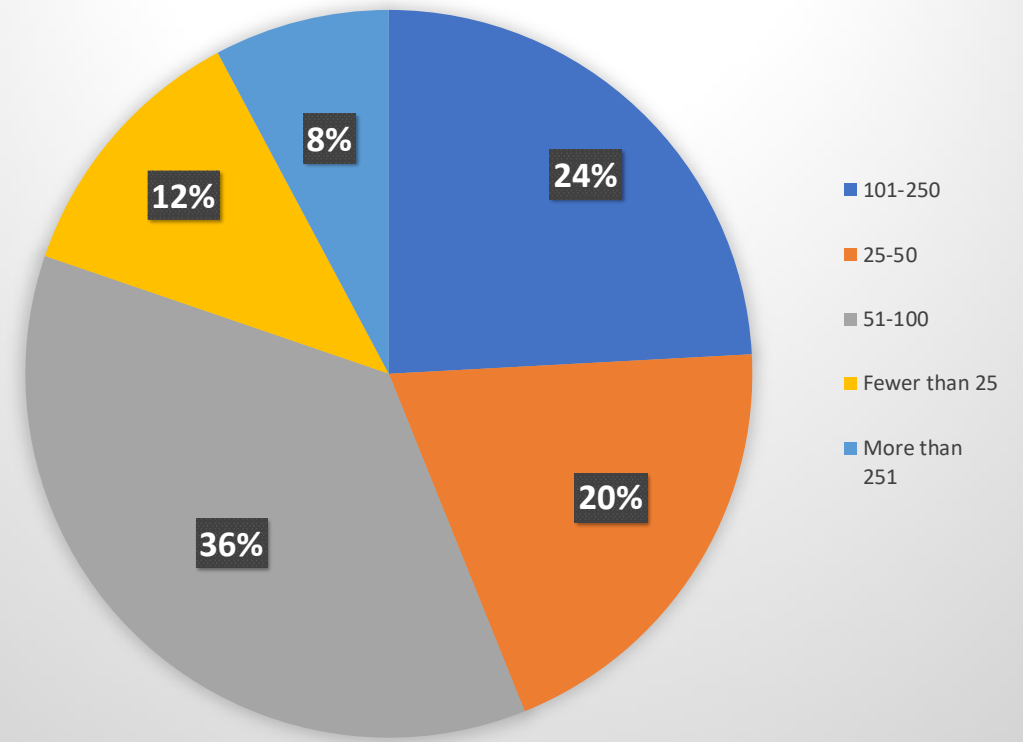


Enrollment Volumes (% of EnglishUSA programs)

Fall

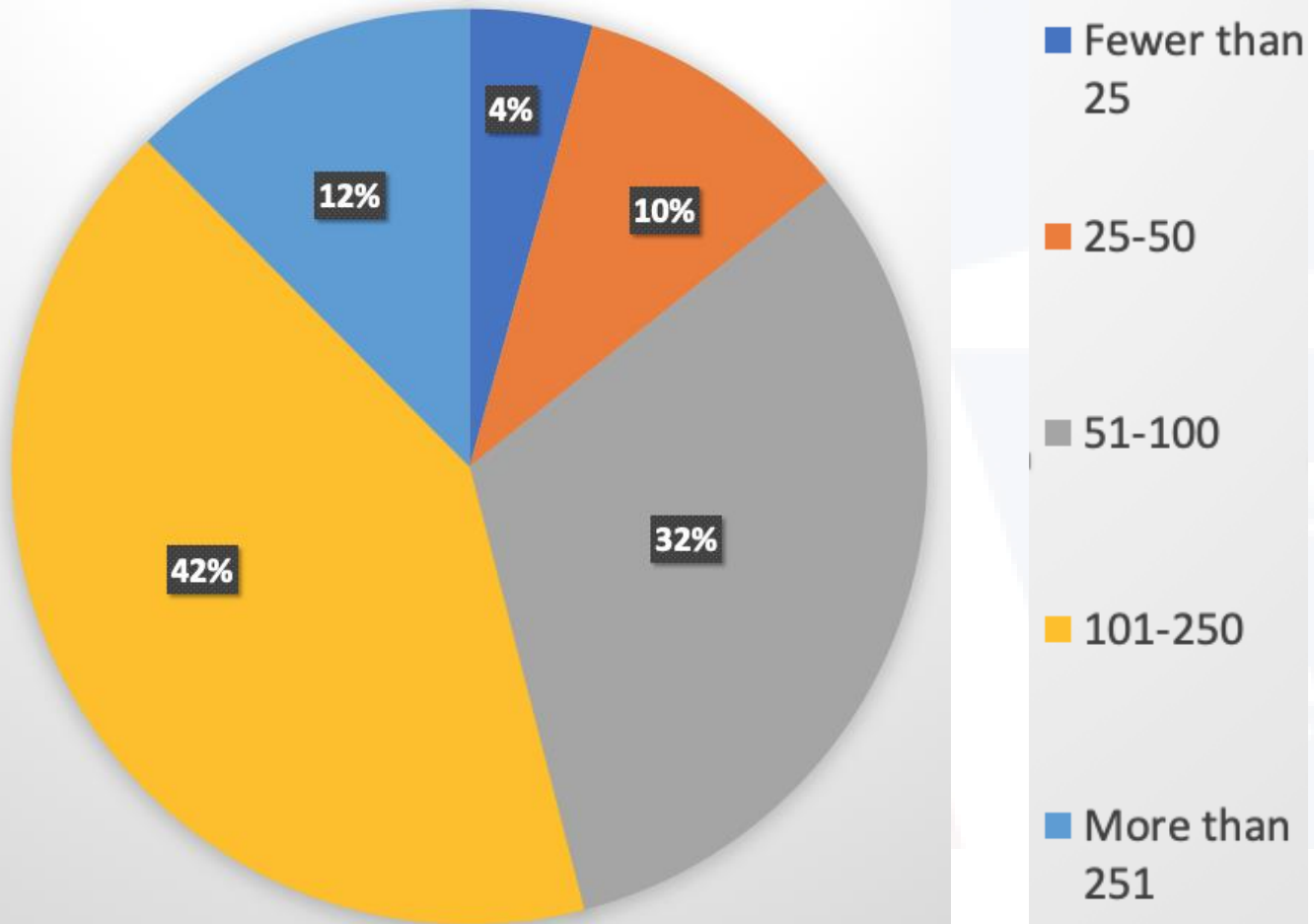


Spring

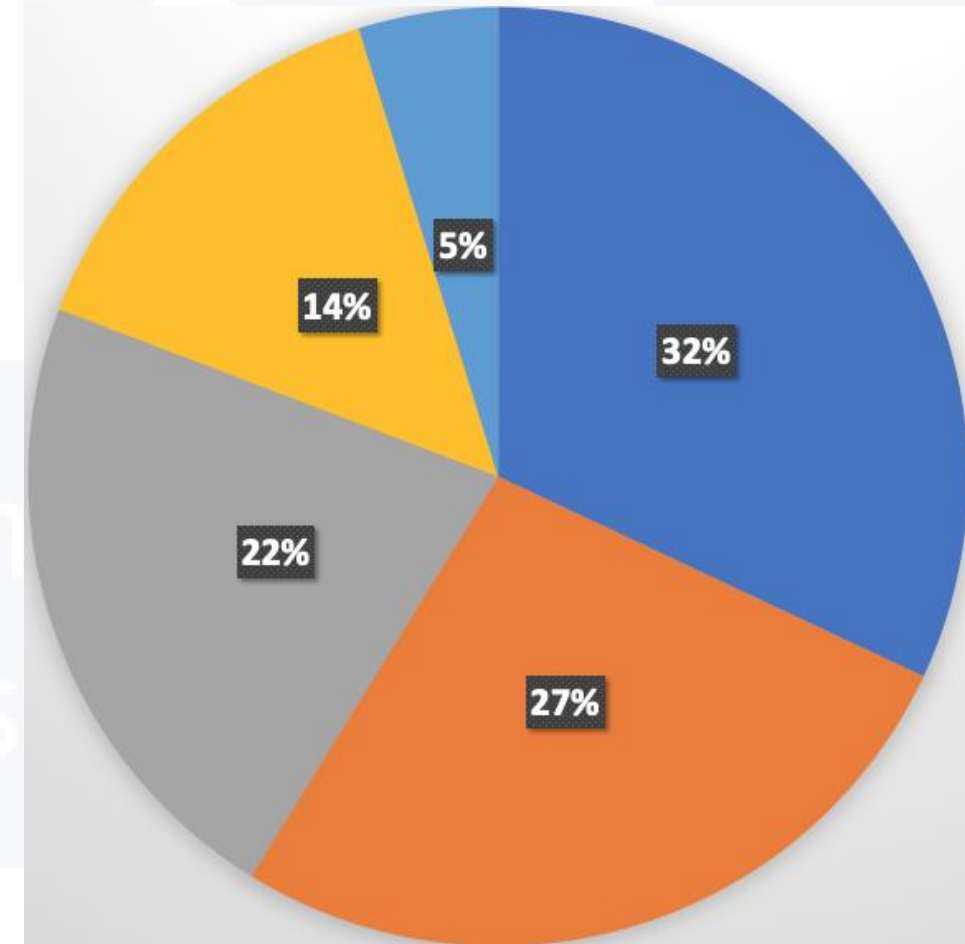


Summer Enrollments

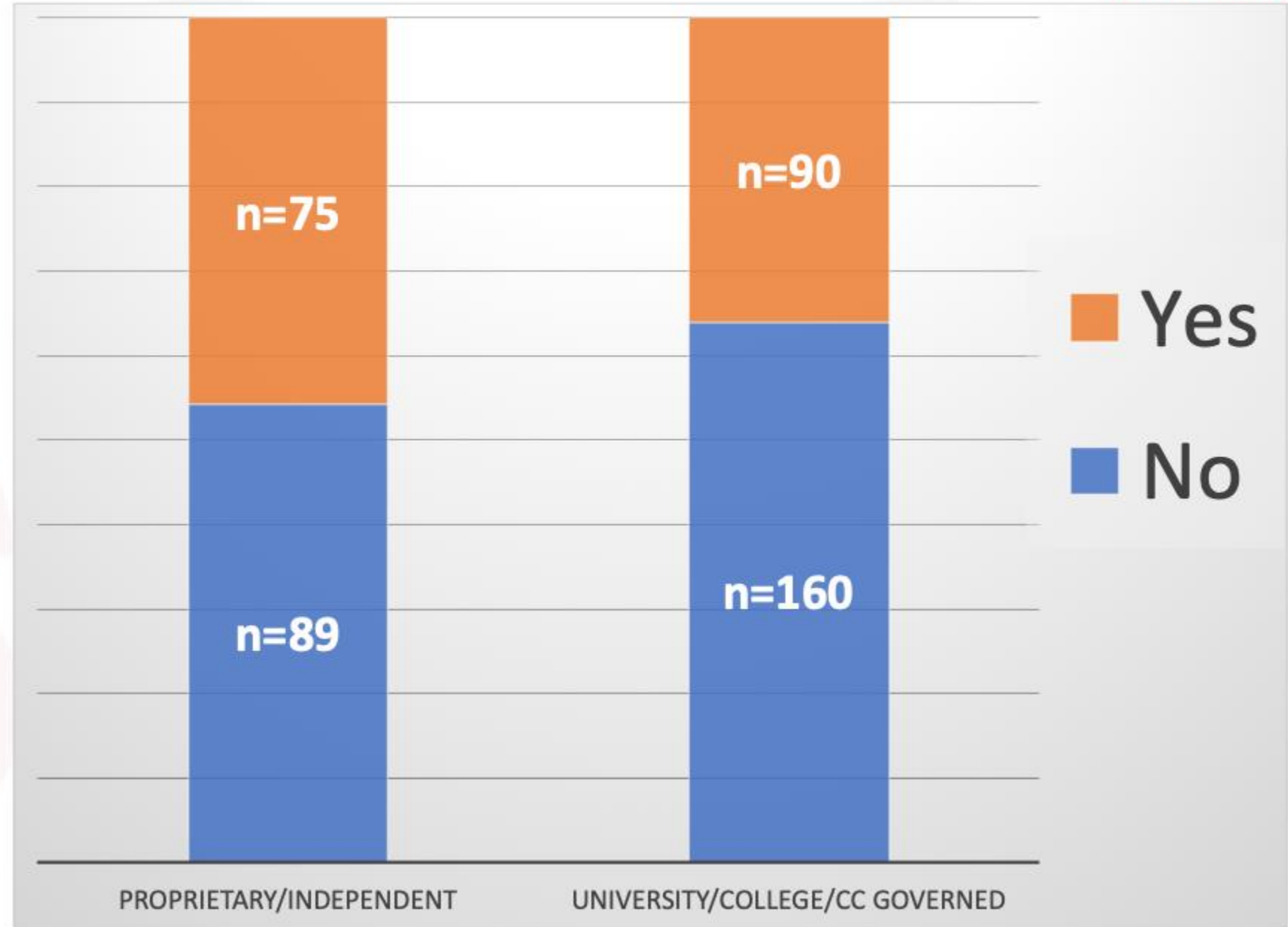
Proprietary



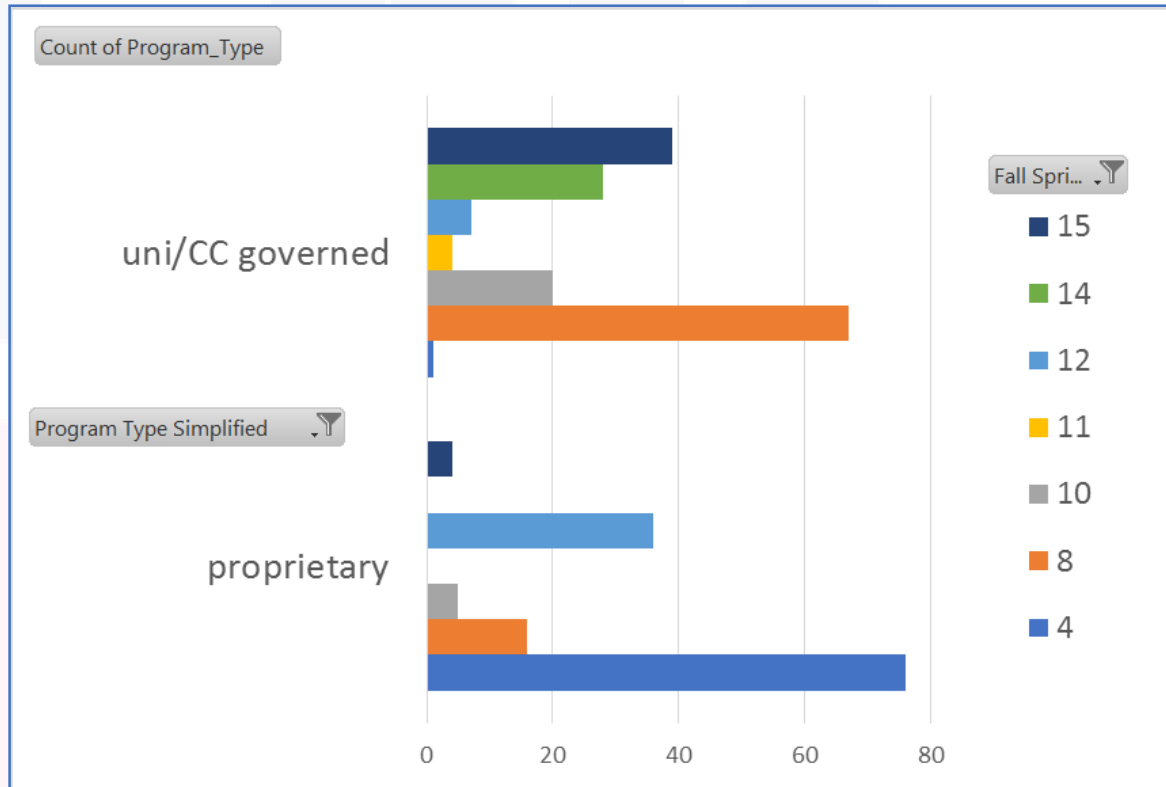
University/College



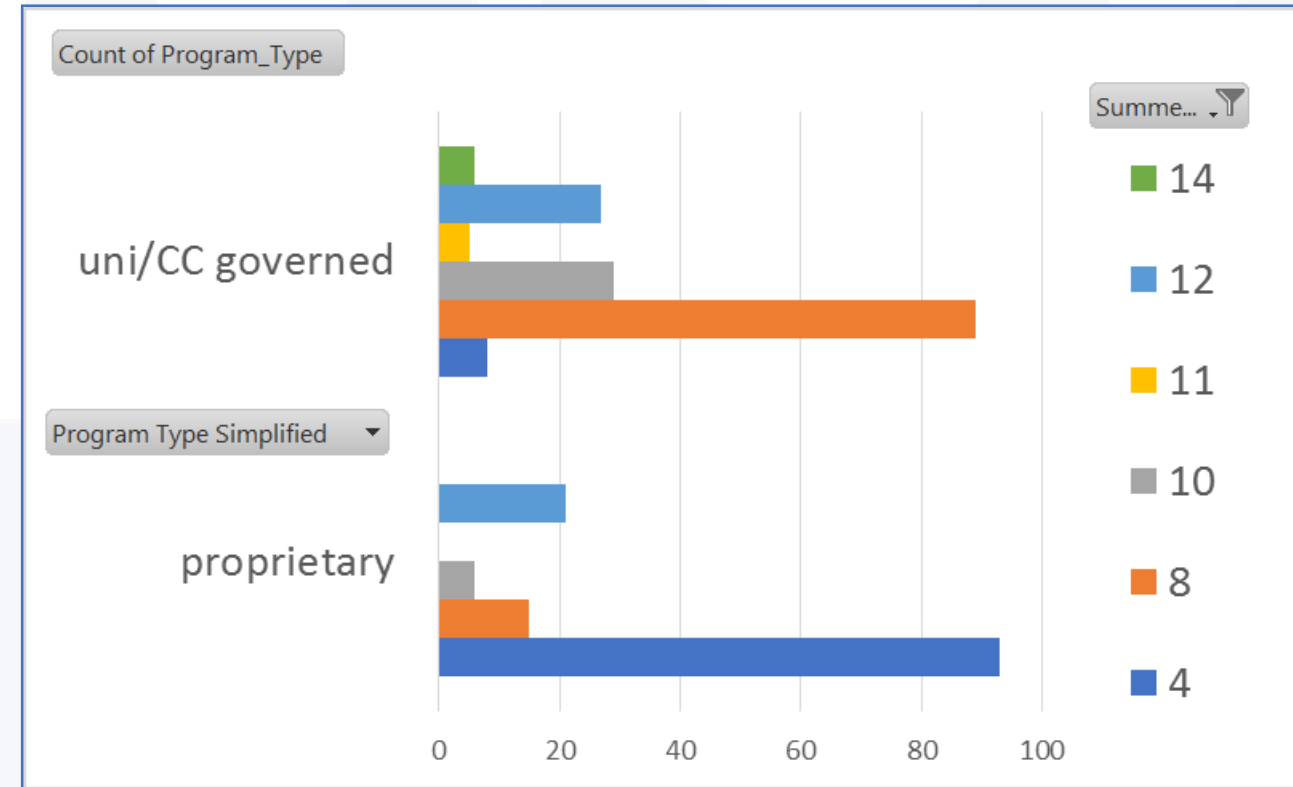
Junior programs offered



Length of Terms

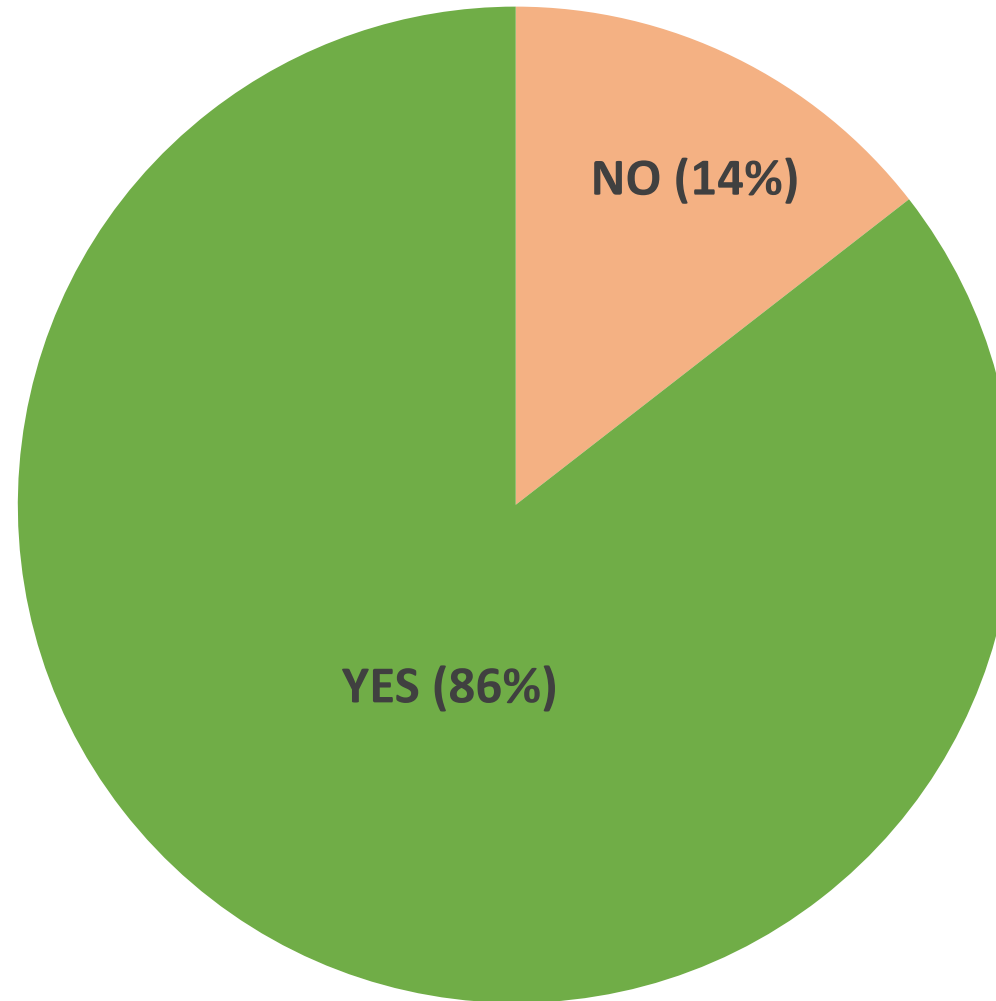


Fall and Spring Term Lengths

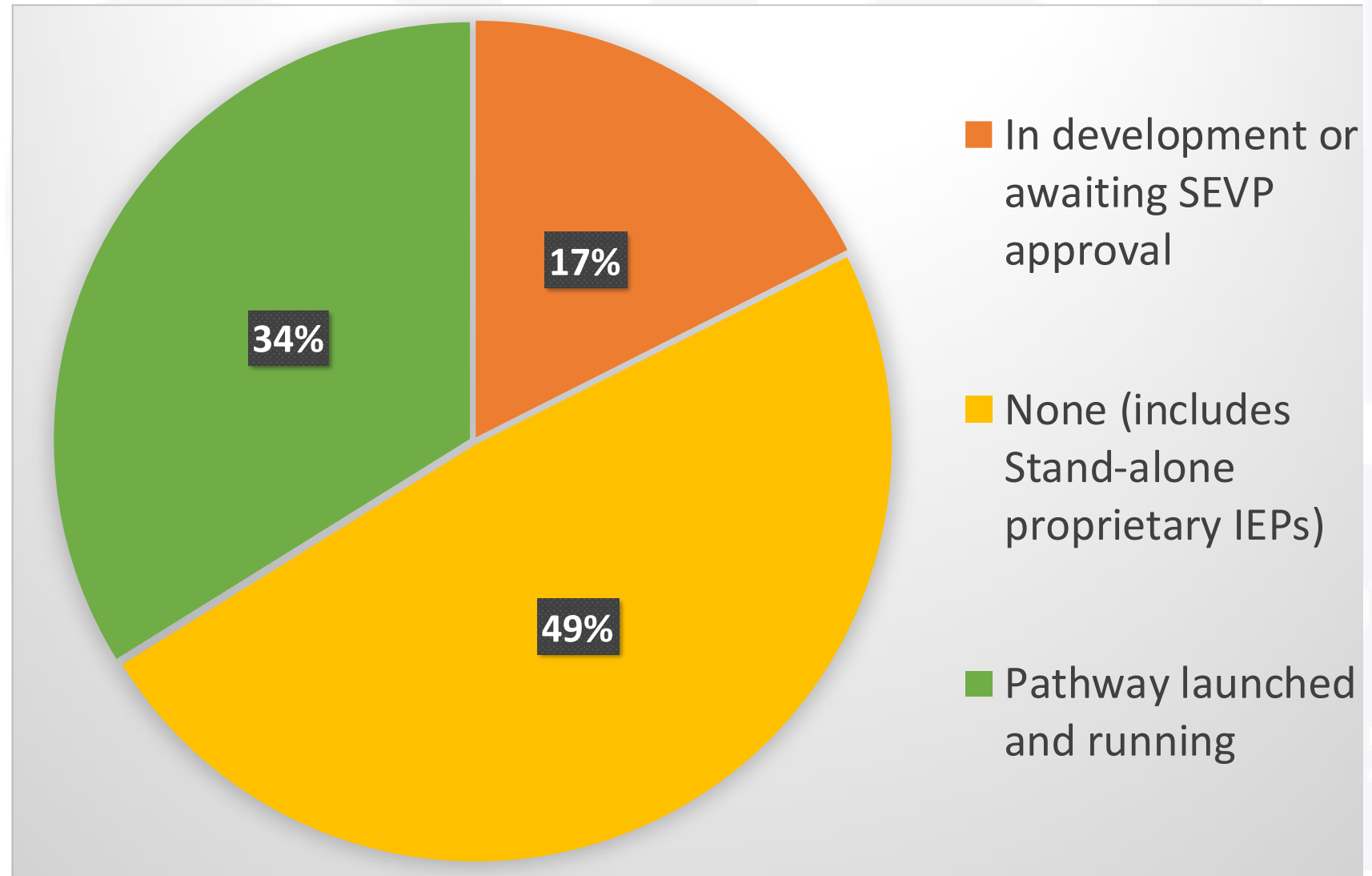


Summer Term Lengths

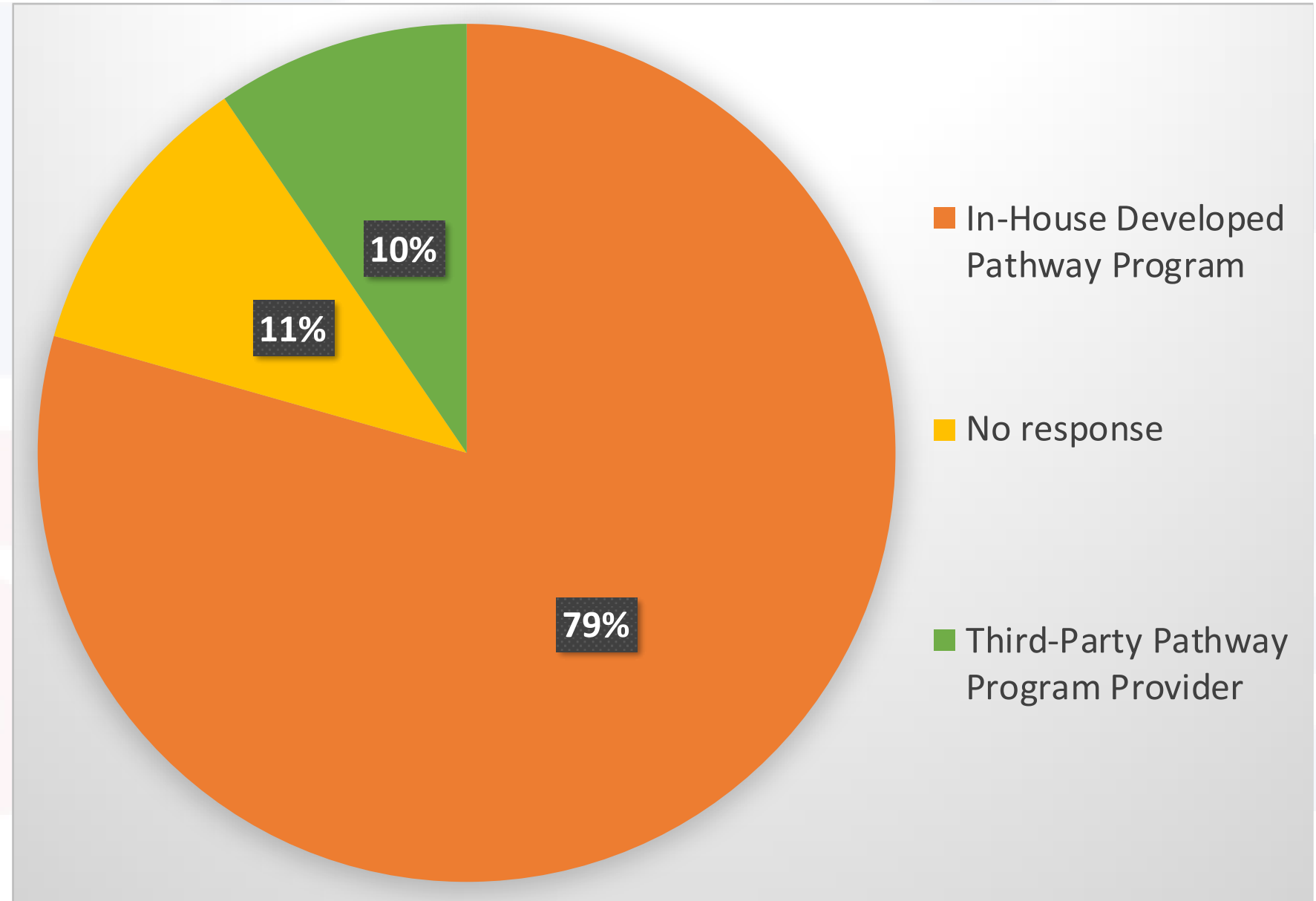
Part-time study allowed in member programs



Member programs running pathways



Pathway program types (launched or submitted to SEVP)



Upcoming Conferences & Events



**ENGLISH
USA** EnglishUSA.org

MISSION POSSIBLE
Thriving in Times of Change

★ ★ ★ ★ ★ ★

**SAVE THE DATE AND
JOIN THE MISSION!**


Make your plans now for
the 2019 EnglishUSA
Stakeholders Conference
October 3-4, 2019.

November 18-23 Certified Trade
Mission to Brazil & Colombia



 **U.S. COMMERCIAL
SERVICE**
United States of America
Department of Commerce

June 12, 2019
Virtual Office Hour for EnglishUSA
Membership Questions



SAVE THE DATE AND MAKE YOUR PLANS NOW
for the 12th Annual Professional Development Conference Jan. 23- 24, 2020

THRIVING IN TIMES OF CHANGE
★ *Best Practices, New Ideas & Innovative Methods for a Changing World* ★

Learn **Collaborate** **Share**



Call for
Proposals open
in June

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



NAFSA
Connecting People. Changing the World.™



gaela

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.**

International
Student Census

Study Abroad
Survey

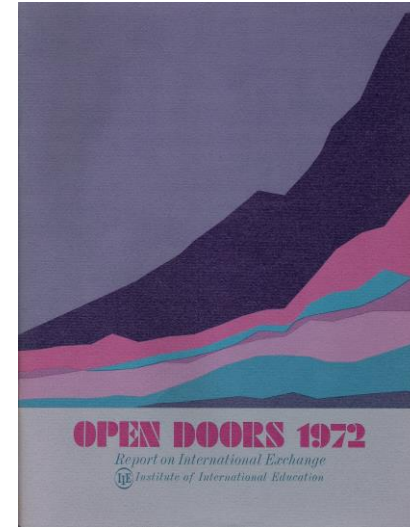
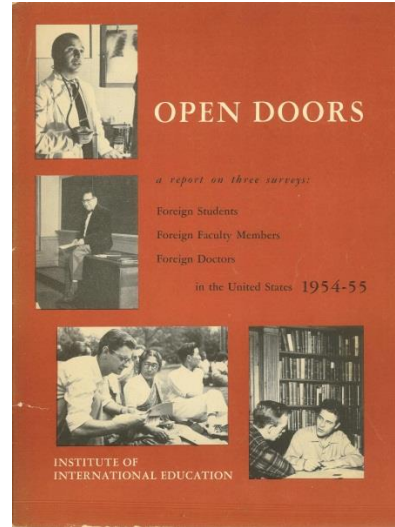
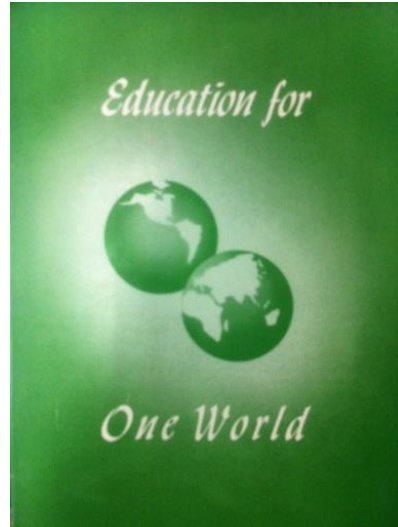
opendoors[®]

International
Scholar Survey

Intensive English
Program Survey

Thank you for 70 years of supporting *Open Doors*

	1921-22
Abyssinia.....	..
Afghanistan.....	..
*Africa.....	4
Alaska.....	12
Albania.....	4
Algeria.....	1
Arabia.....	..
Argentina.....	54
Armenia.....	90
*Asia Minor.....	6
Assyria.....	..
Australia.....	23
Austria.....	23
Azerbaijan.....	..
Azores.....	..



opendoors **70** YEARS

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

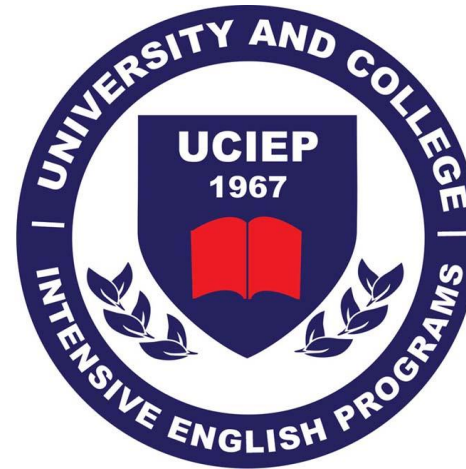
The publication was expanded and renamed *Open Doors*

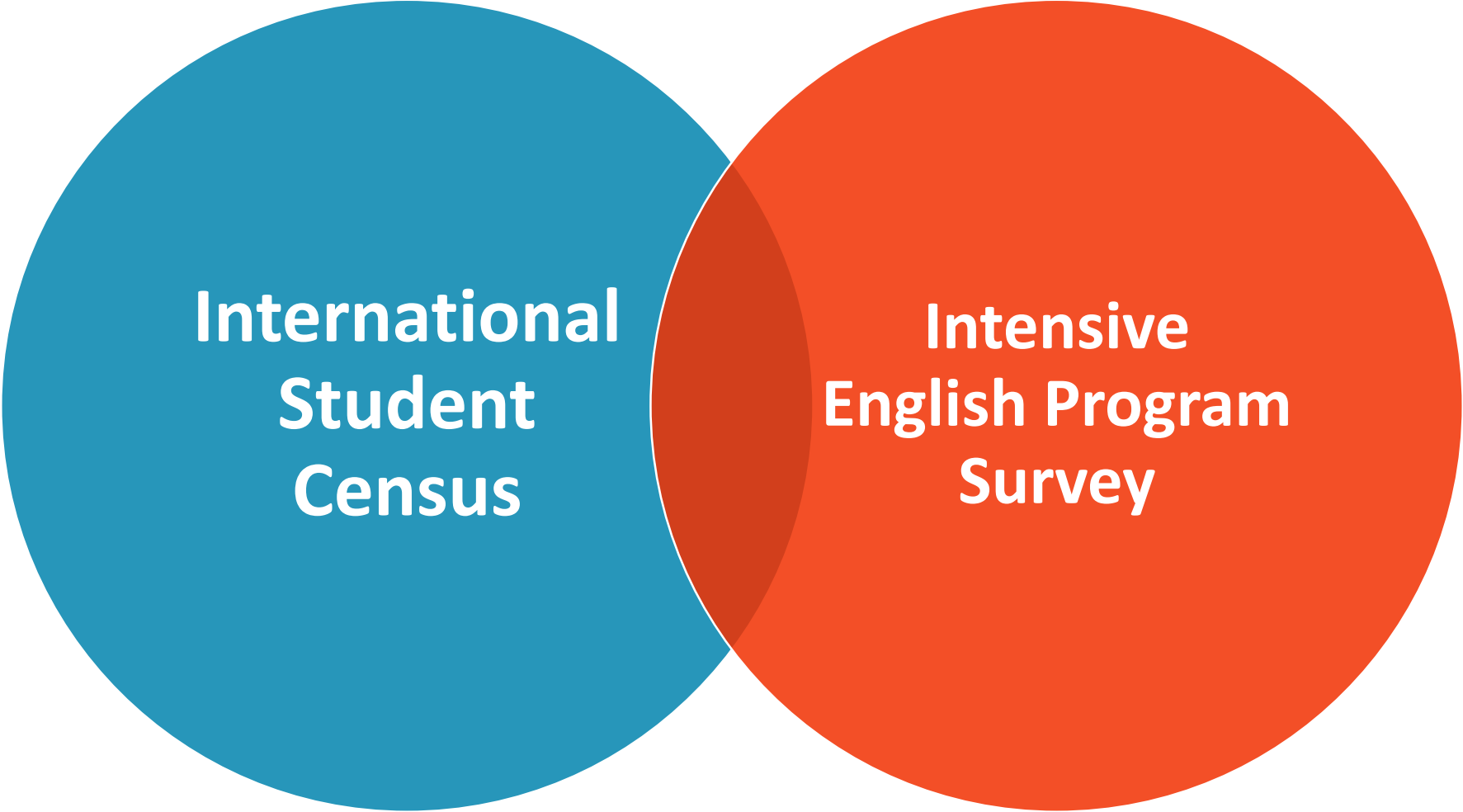
1972

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**

**Intensive
English Program
Survey**

International Student Census

Only accredited higher
education institutions

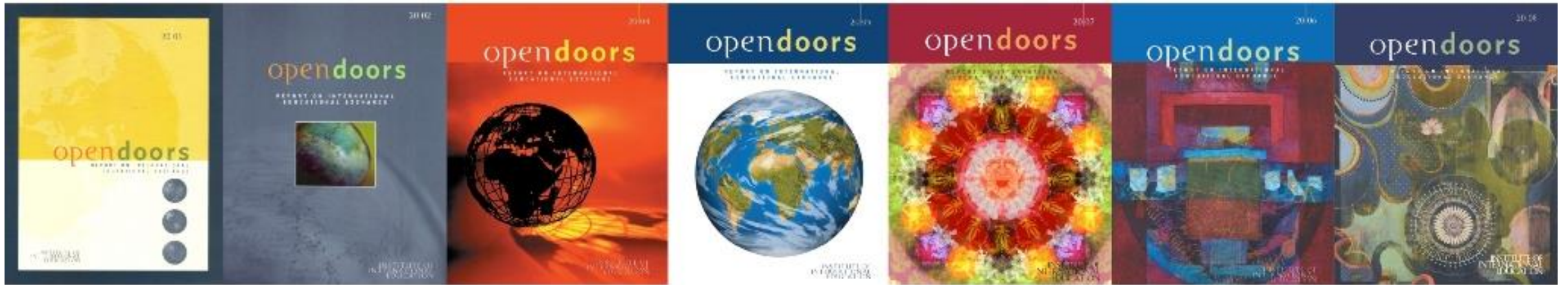
2017/18 academic year

Intensive English Program Survey

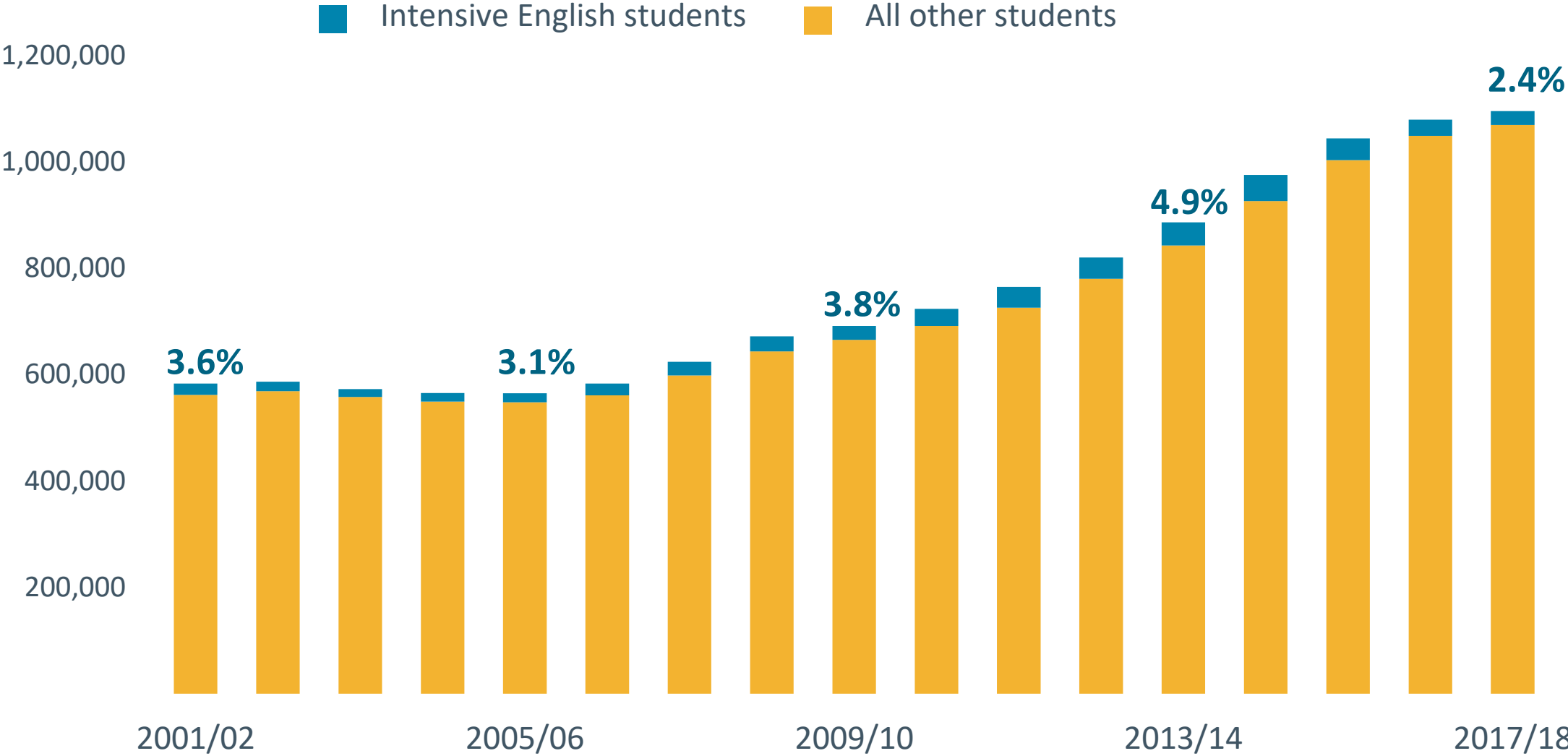
IEPs in higher education
and independent
providers

January 2018 –
December 2018

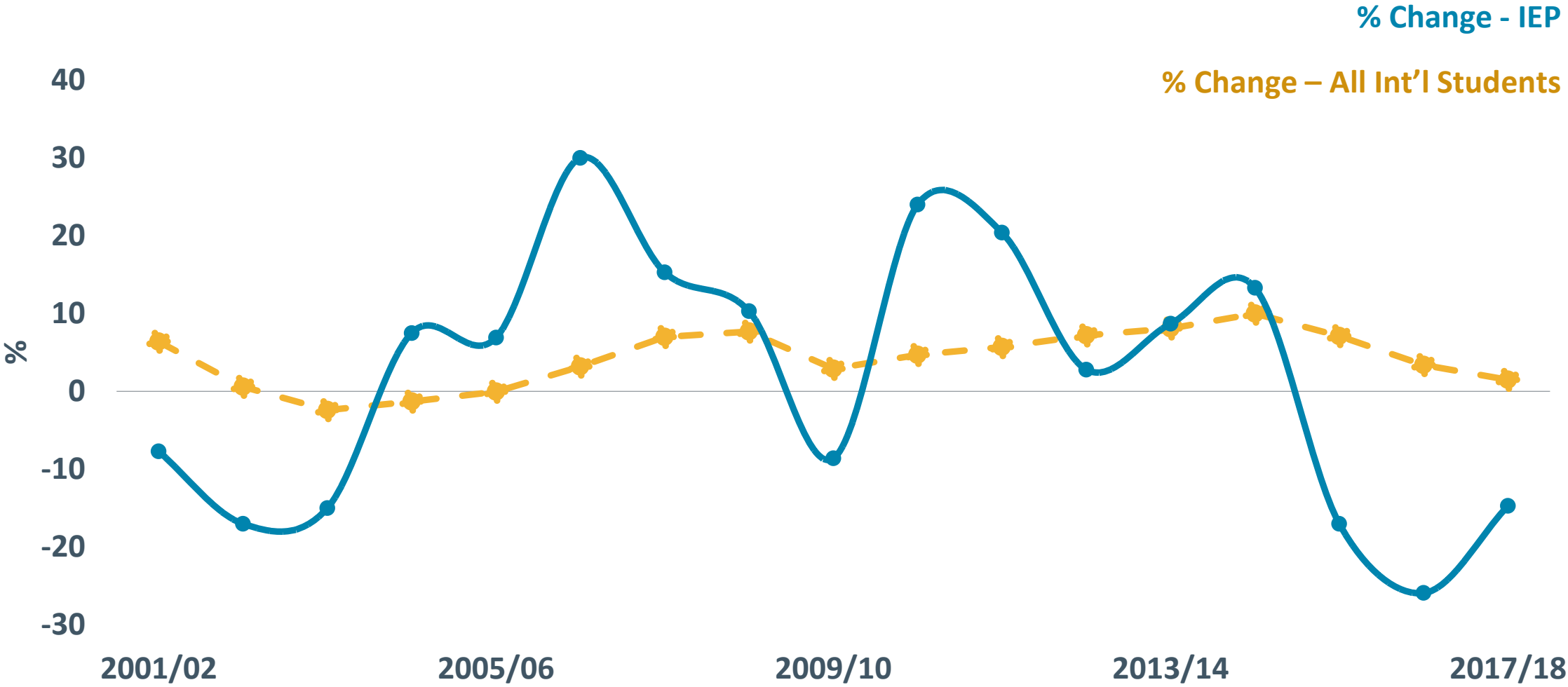
Intensive English Programs in Higher Education



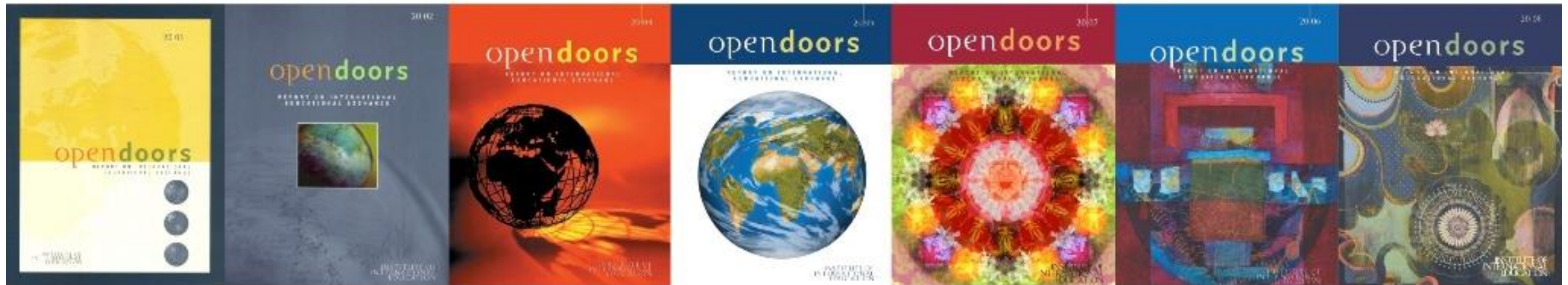
Percent of Intensive English Enrollment in Higher Education



IEP enrollment fluctuates more than overall int'l student enrollment

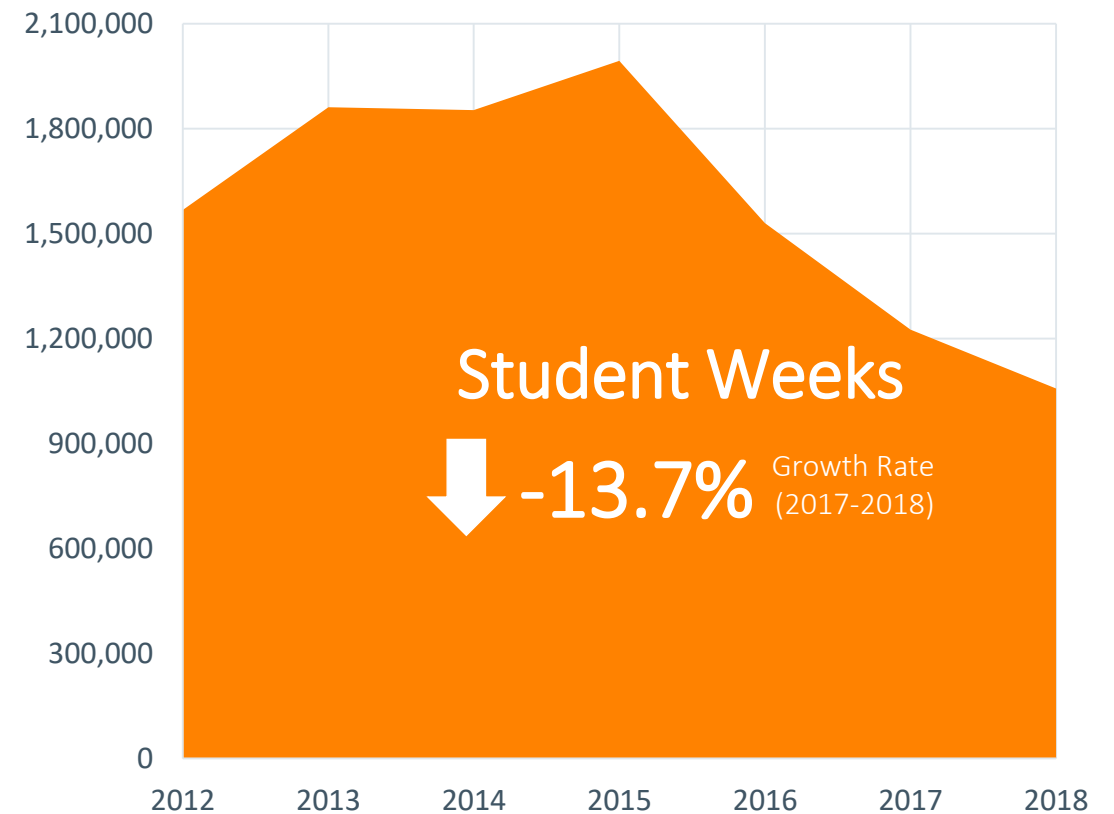
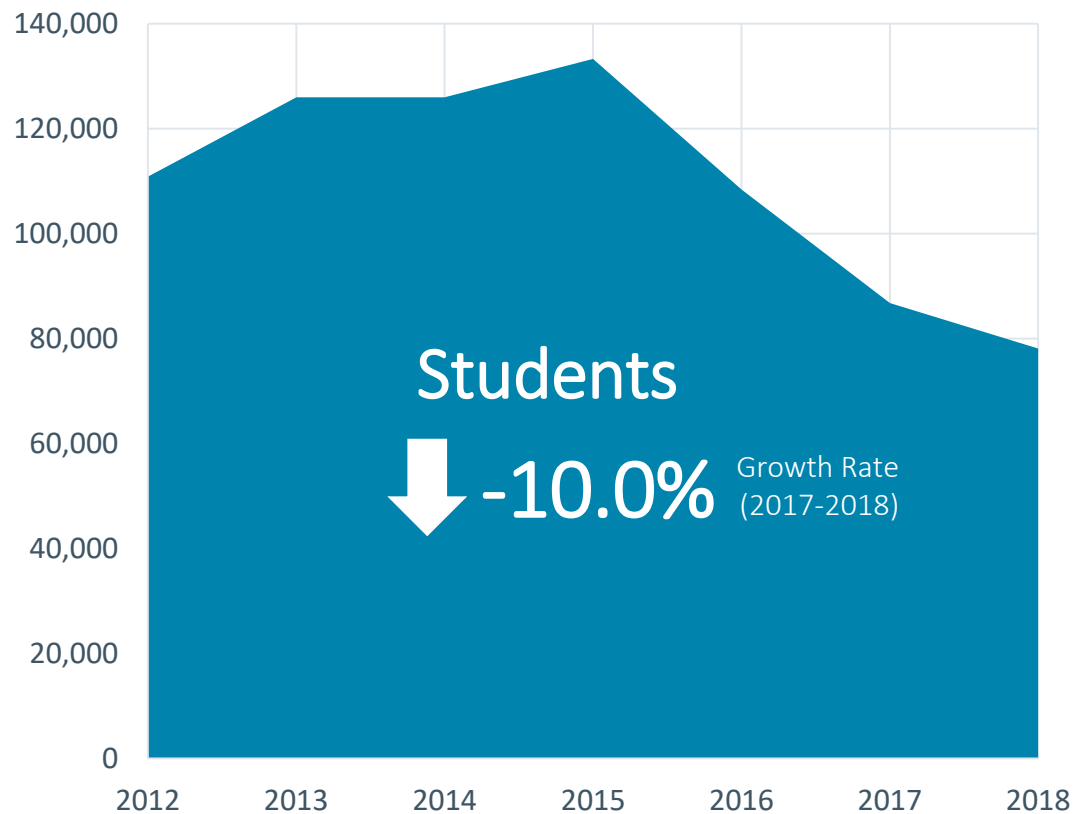


Intensive English Program Survey

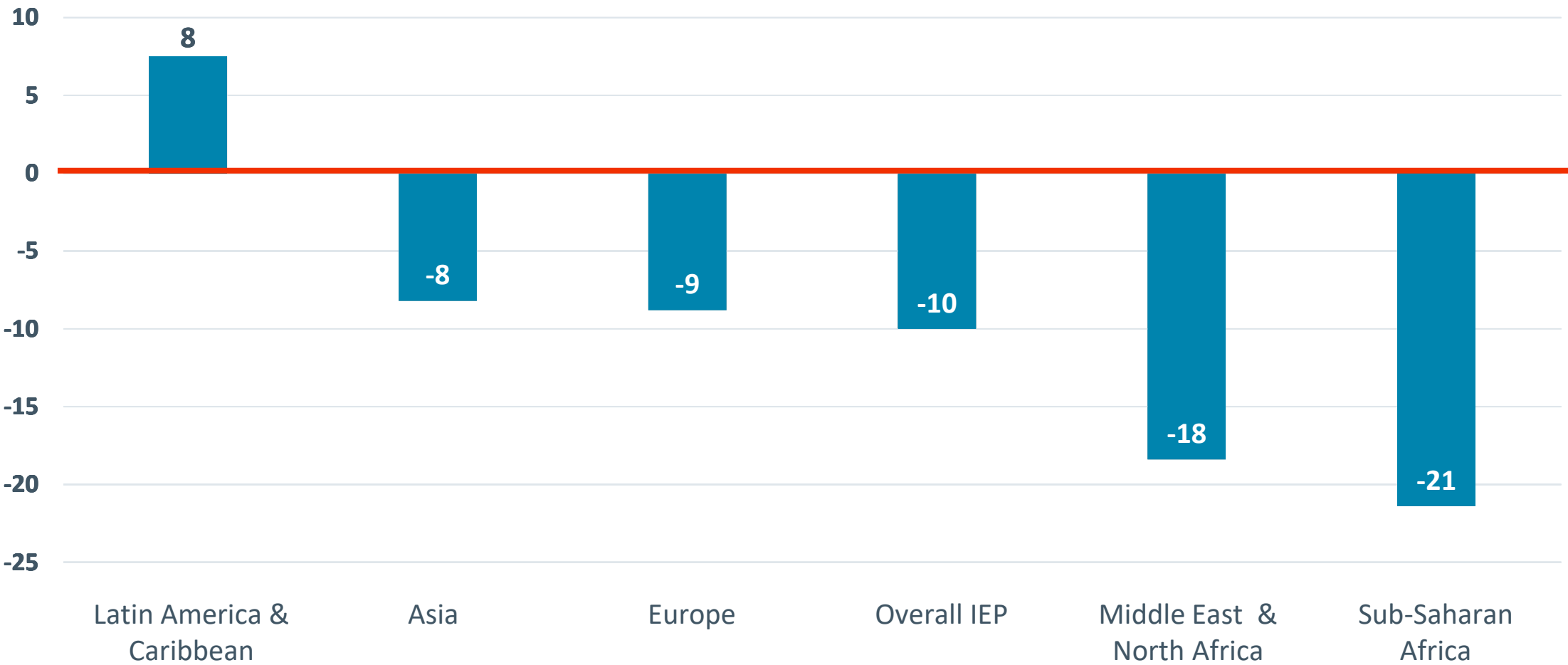


International Intensive English Enrollments

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



Percent Change in IEP 2017 to 2018



Top Ten Places of Origin

China: 17,700

Japan: 12,305

Saudi Arabia: 9,661

Brazil: 6,154

South Korea: 5,619

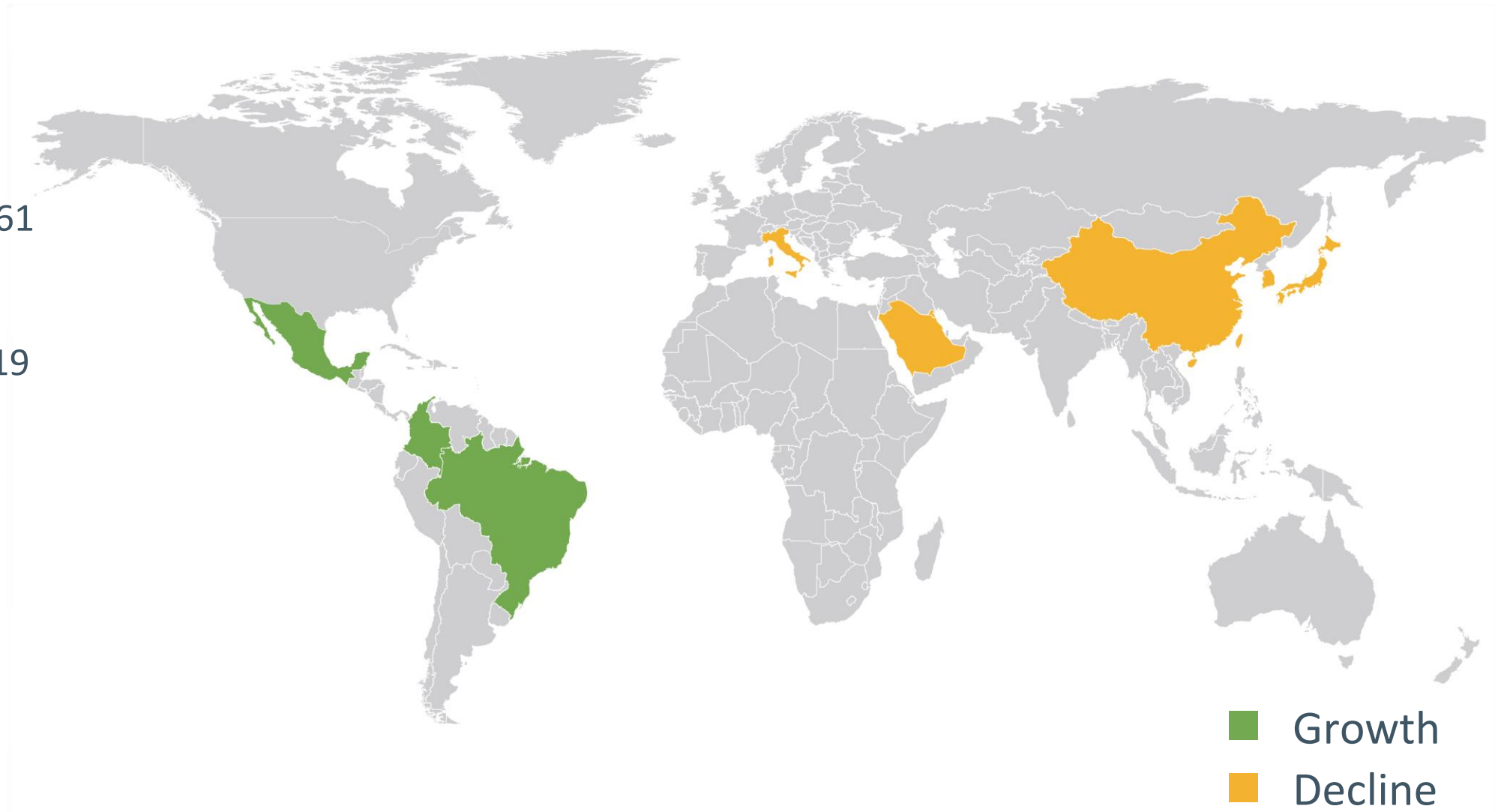
Taiwan: 2,662

Mexico: 1,976

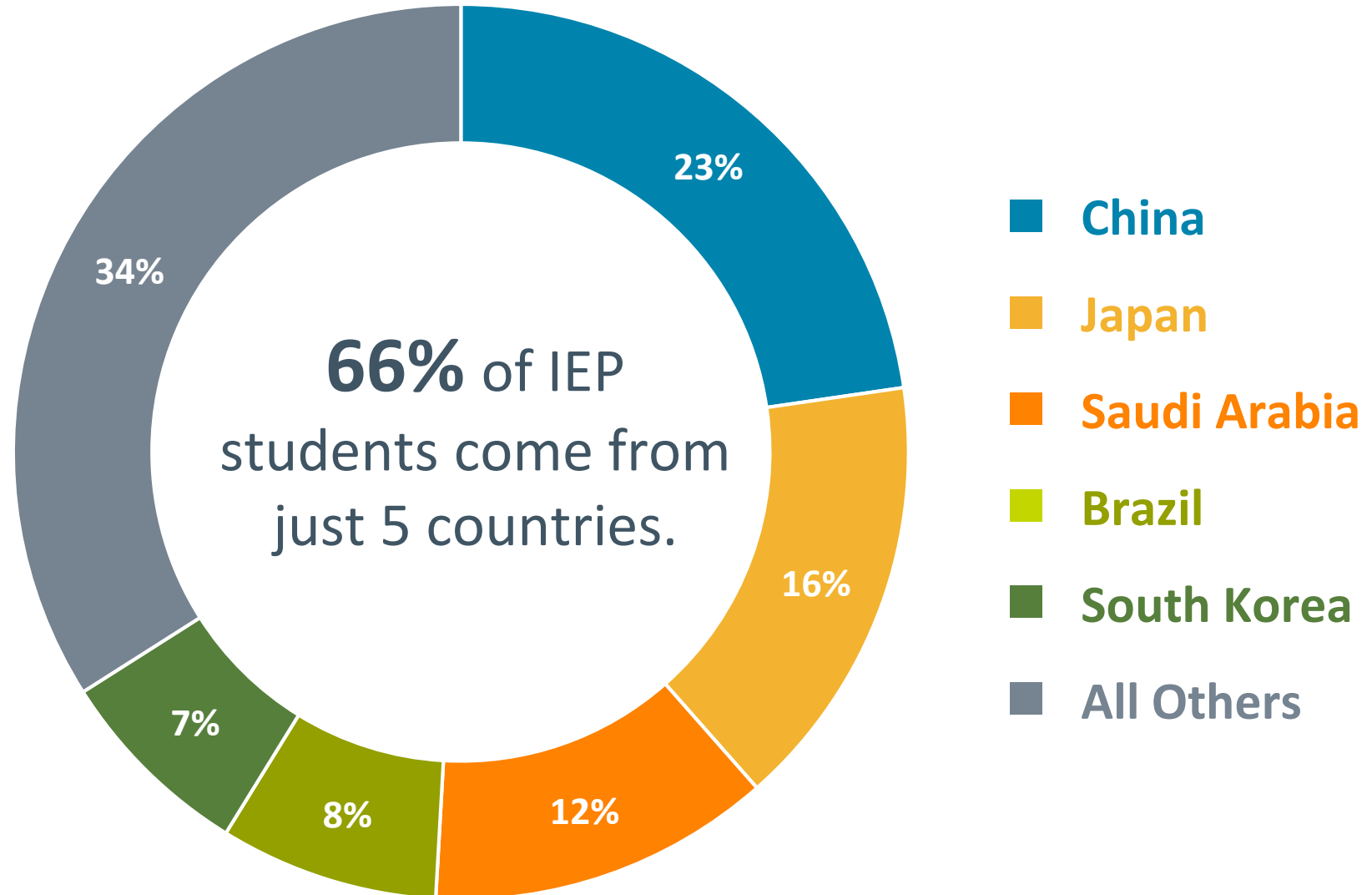
Colombia: 1,837

Kuwait: 1,833

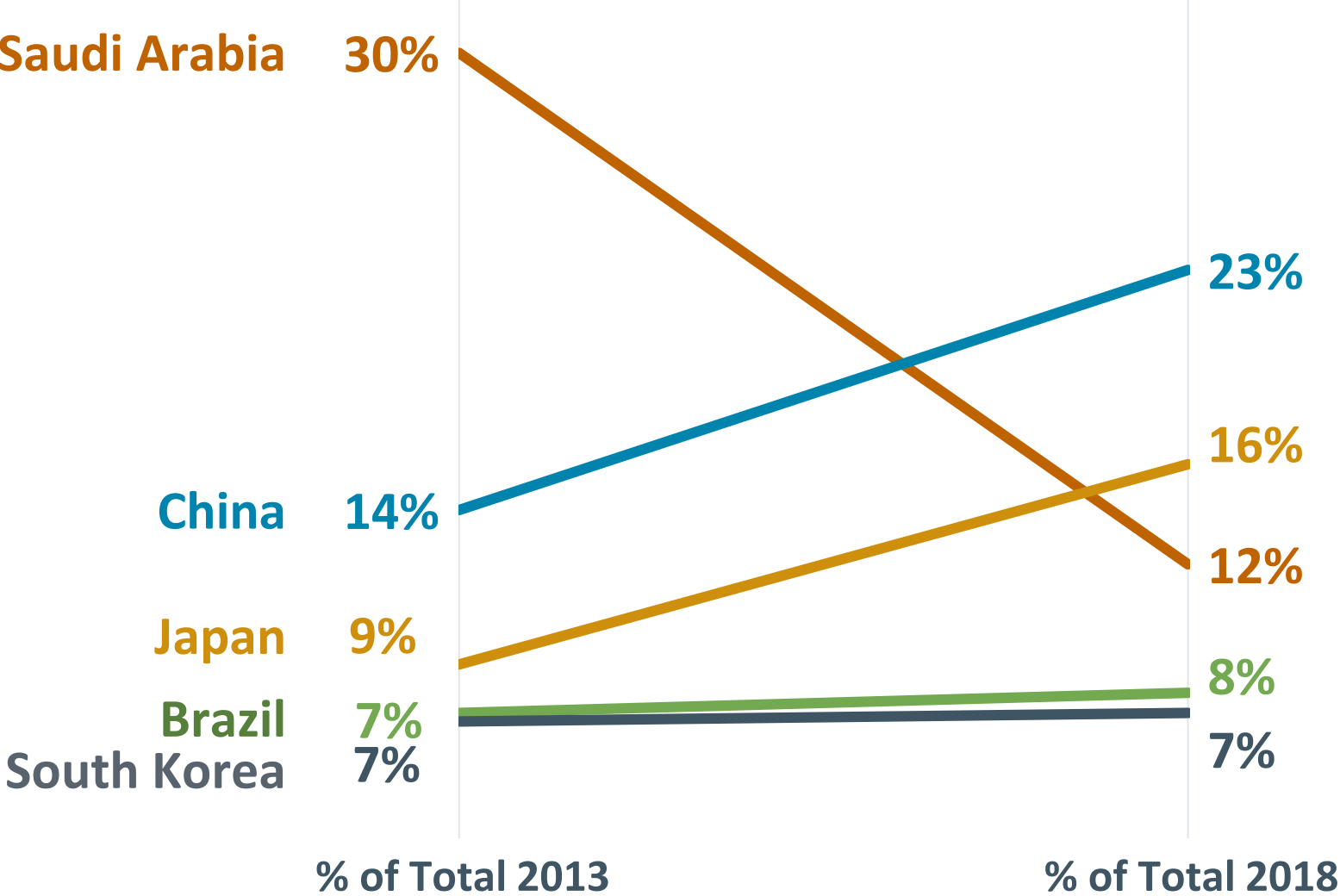
Italy: 1,331



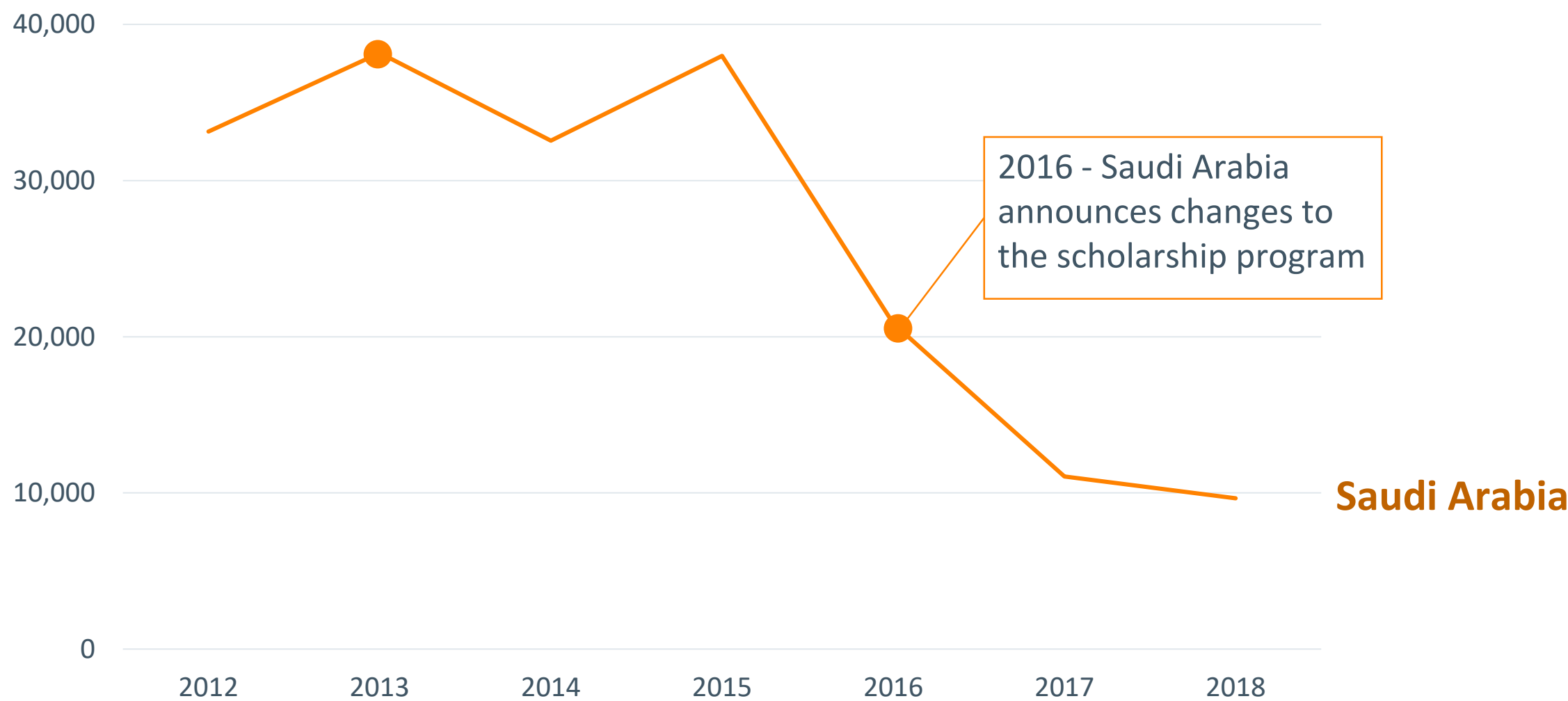
IEP top places of origin



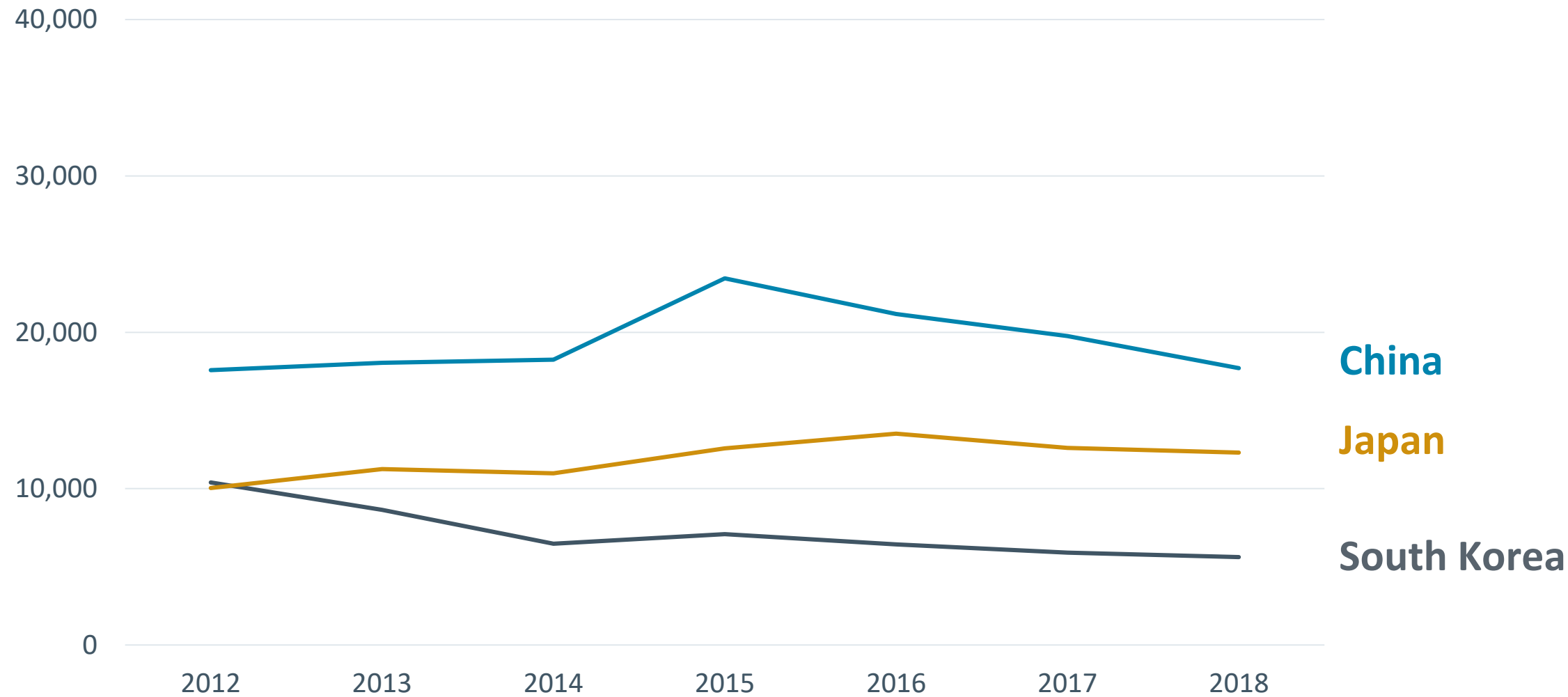
Top 5 Places of Origin – Percent of Total 5 Year Comparison



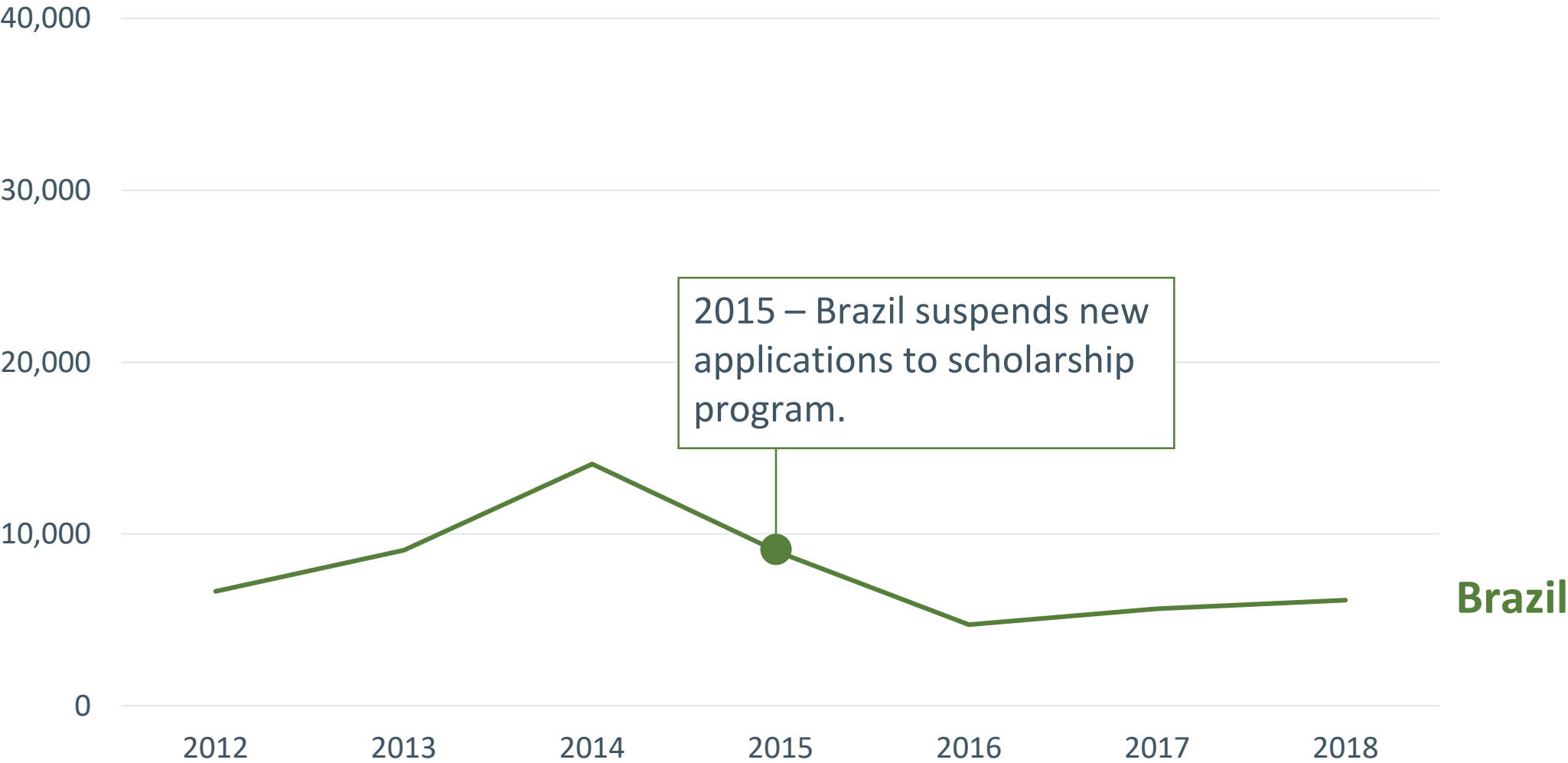
Top 5 Places of Origin 5 Year Comparison



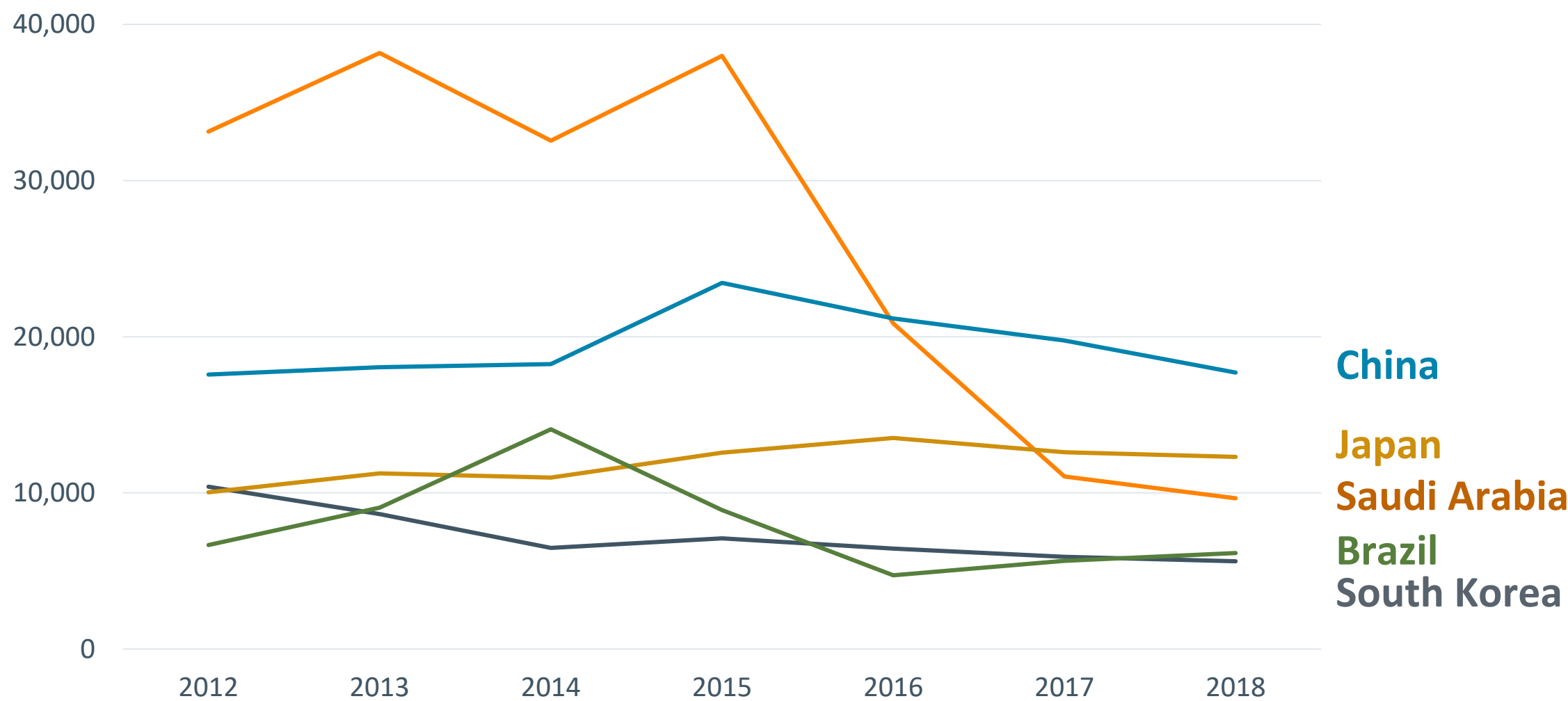
Top 5 Places of Origin 5 Year Comparison



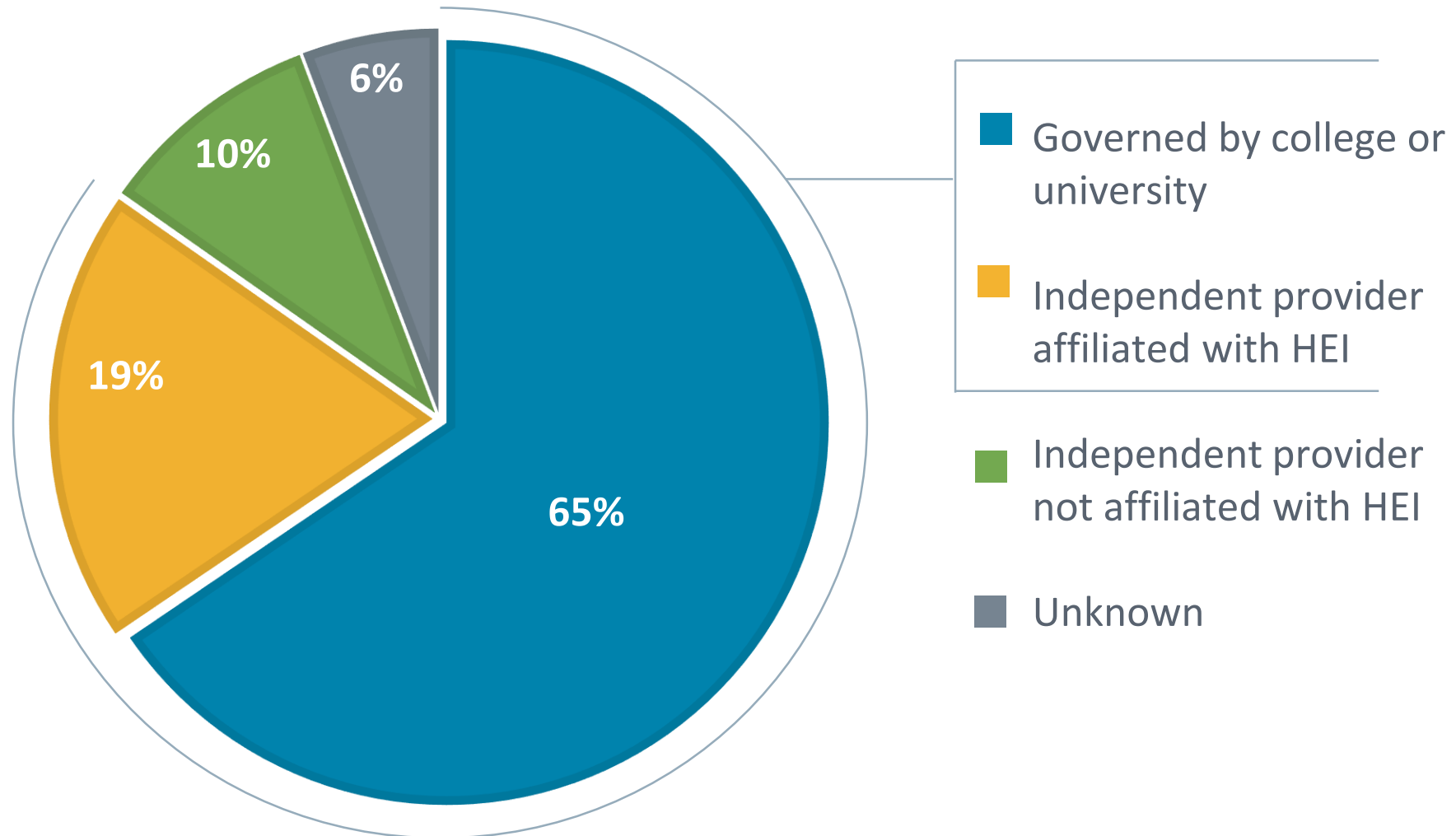
Top 5 Places of Origin 5 Year Comparison



Top 5 Places of Origin 5 Year Comparison

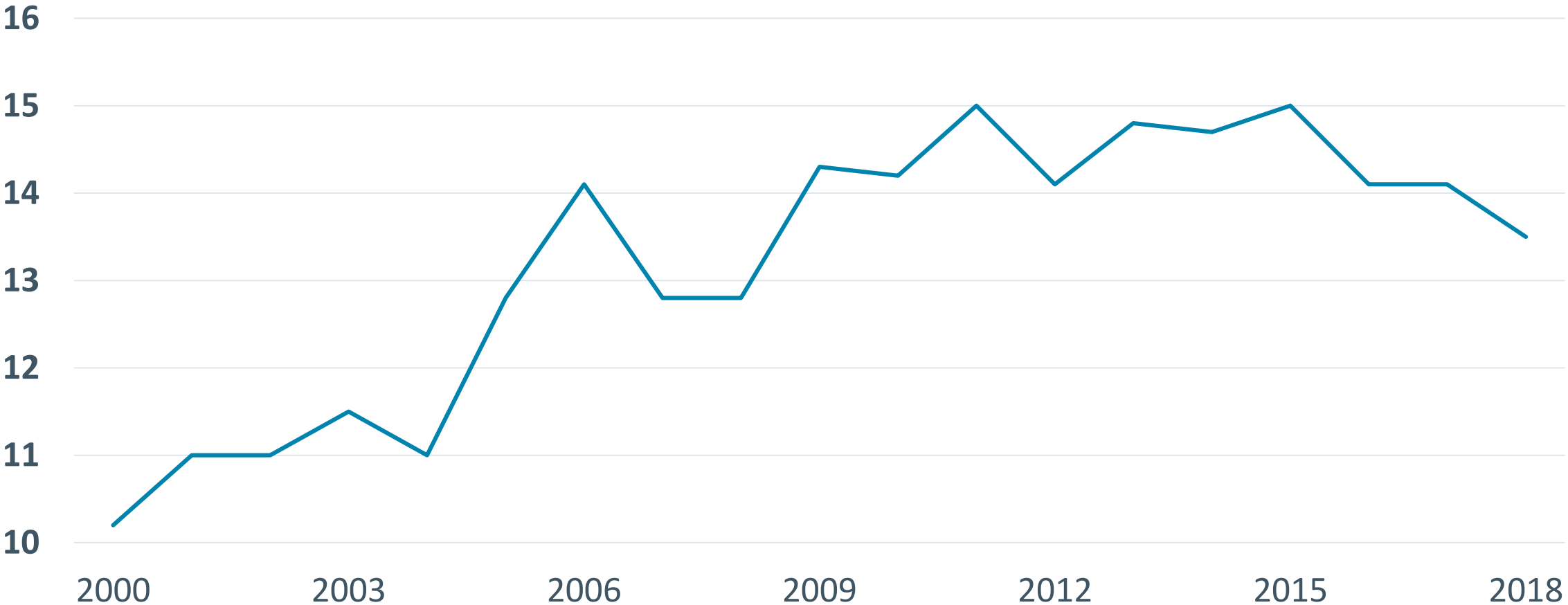


Types of intensive English programs

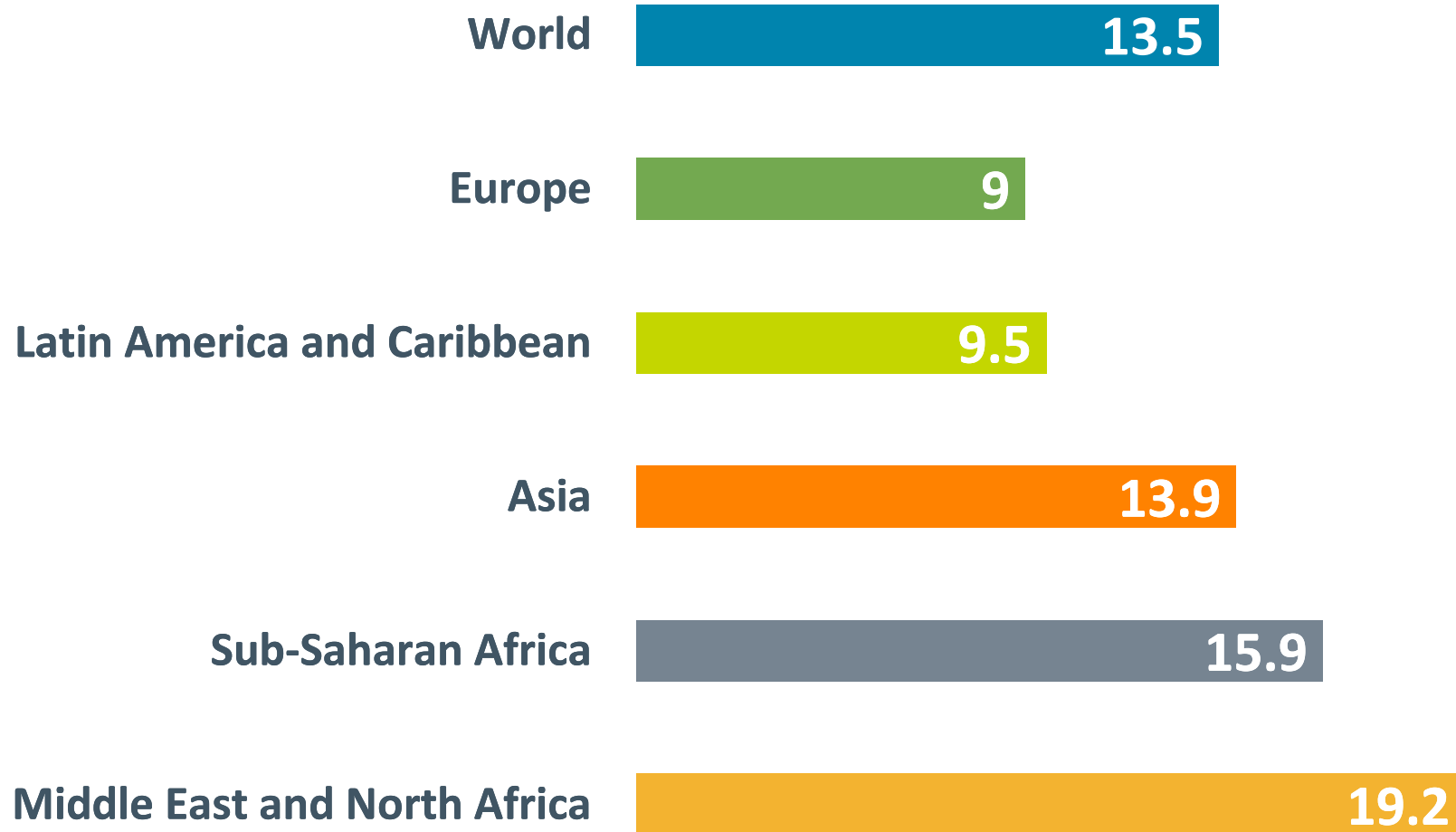


Average IEP weeks per student

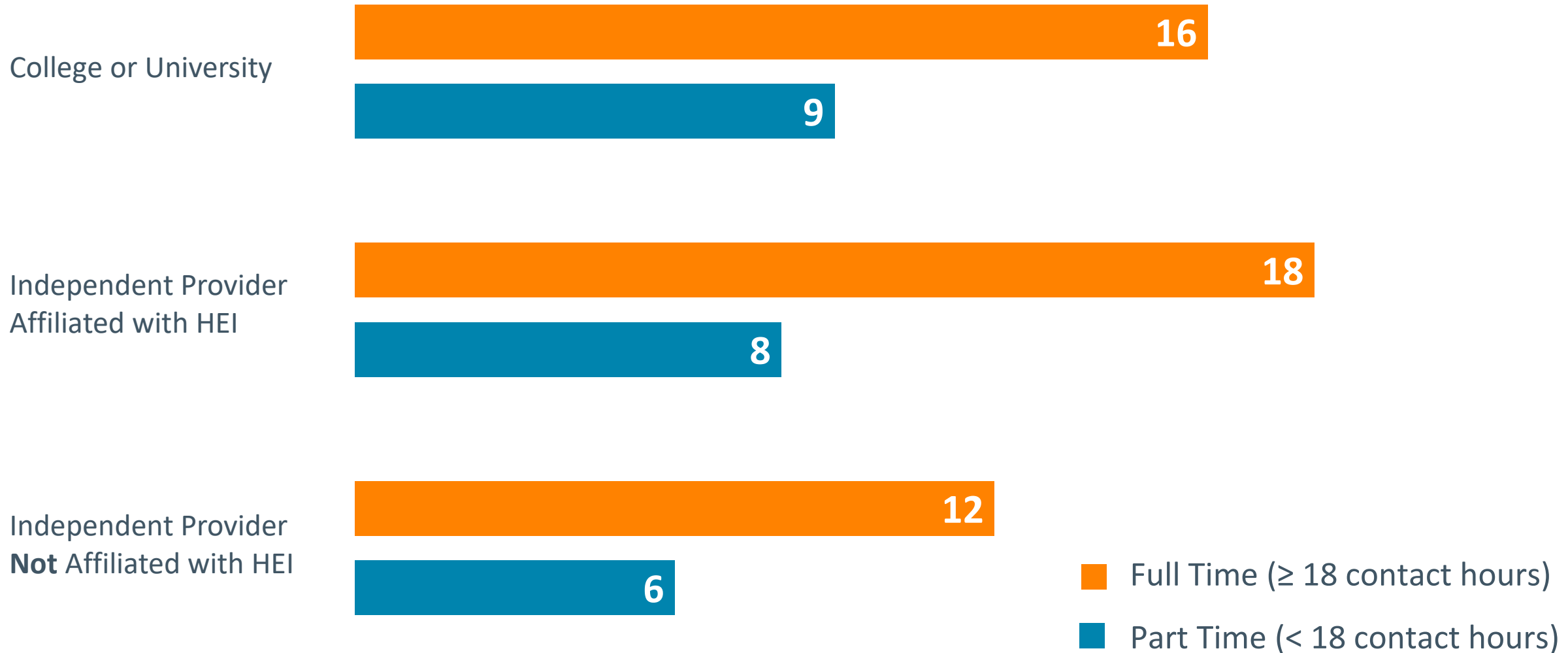
World 13.5



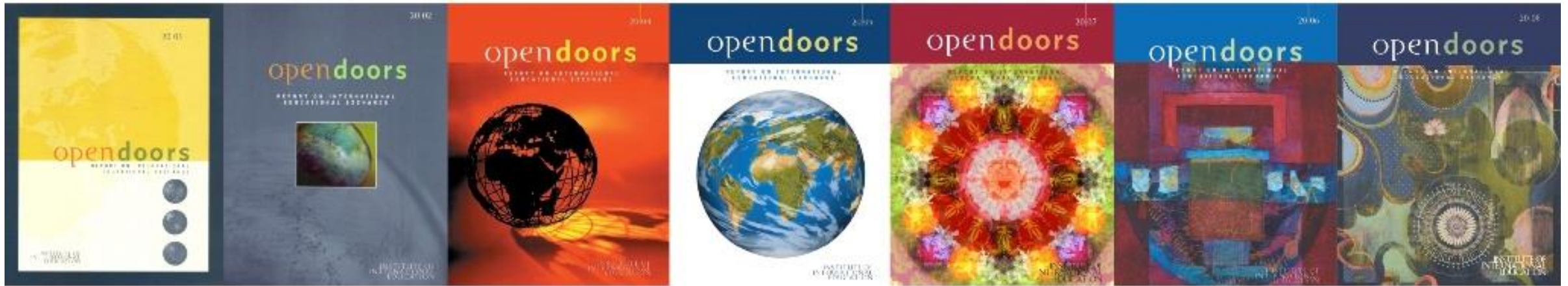
Average IEP weeks per student



Average IEP weeks by institutional type and enrollment status



Additional Resources

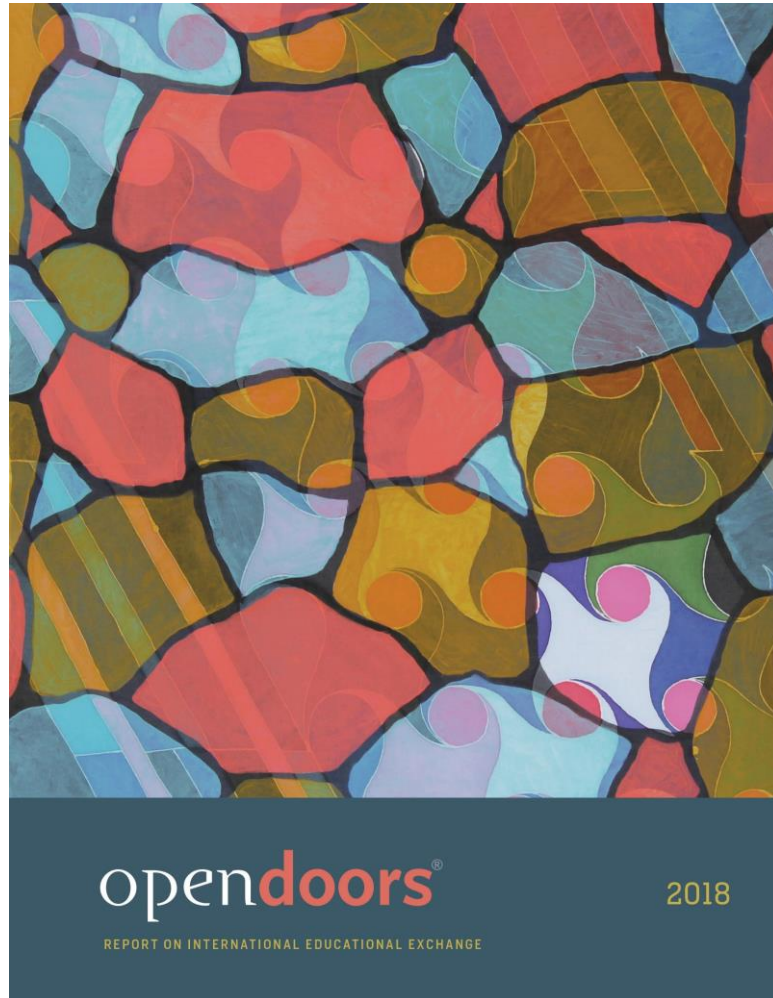


Intensive English USA Directory

- Print directory with comprehensive program information
- Listed alphabetically by U.S. state
- Order at iiebooks.org

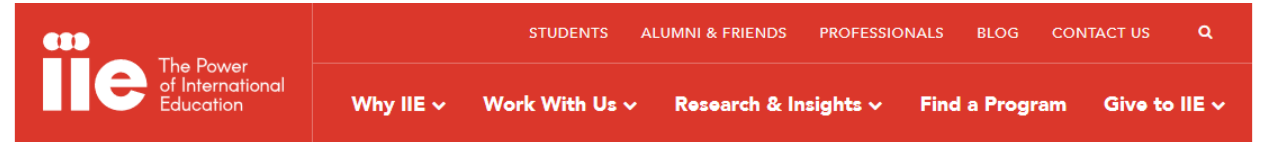


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opendoors[®] 70 YEARS

www.iie.org/opendoors



RESEARCH & INSIGHTS - OPEN DOORS - DATA

Intensive English Programs

International Students

U.S. Study Abroad

Intensive English Programs

International Scholars

Economic Impact

Community Colleges

Fall International Enrollments
Snapshot Reports

U.S. DESTINATIONS OF INTERNATIONAL STUDENTS



Places of Origin

Data on the 25 leading places of origin and all places of origin for international students participating in intensive English programs in the United States.





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

	Services	2018
1	Personal Travel (Other)	\$125.9 Billion (USD)
2	Professional and Management Consulting Services (Business Services)	\$87.8 Billion (USD)
3	Financial Management (Financial Services)	\$53.4 Billion
4	Use of IP for Industrial Processes	\$46.0 Billion (USD)
5	Education-related (Personal Travel)	\$45.3 Billion (USD)



Market Trends: Brazil

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, Kazuko.Tsurumachi@trade.gov

Tetsuko Fujioka, Tetsuko.Fujioka@trade.gov



Market Trends: Mexico

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





Market Trends: South Korea

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





2019 Education and Training Service Resource Guide

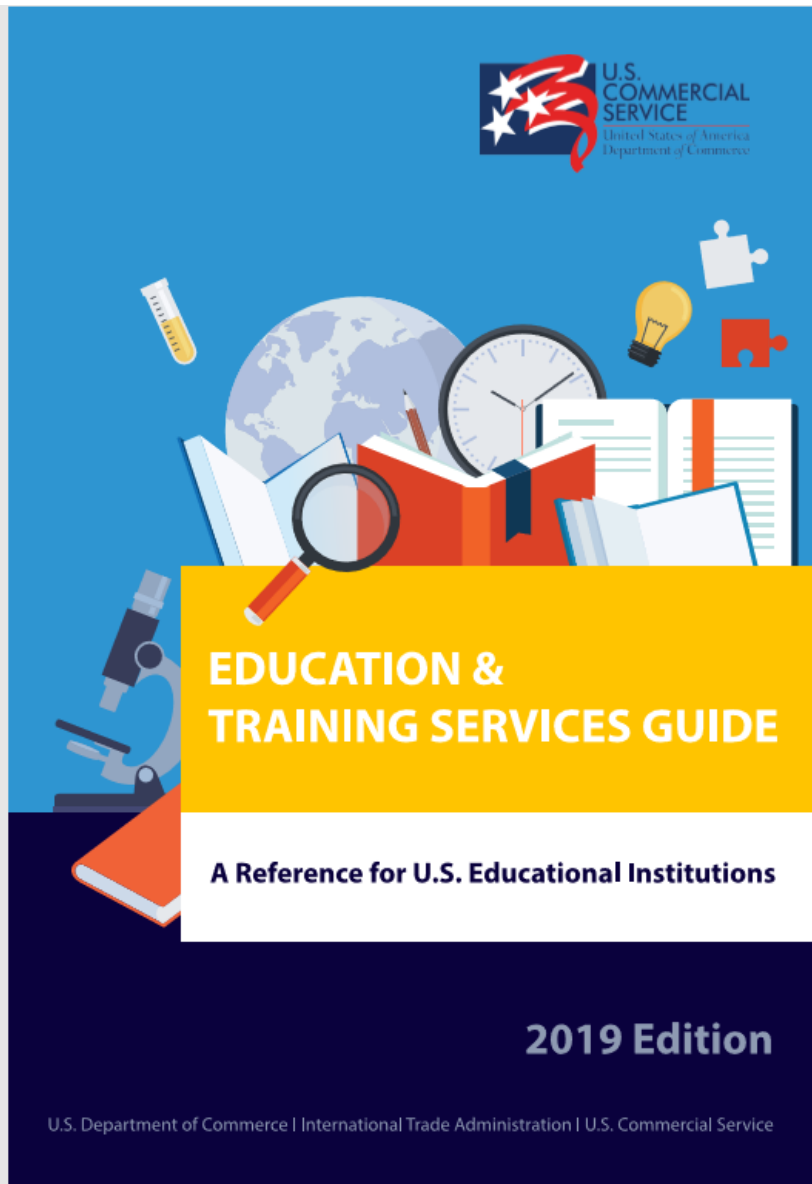


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2019 Education and Training Service Resource Guide

2019 BEST PROSPECTS BY COUNTRY

Country	High School	Boarding Schools	Community College	Undergraduate	Graduate	Law School	OPT	ESL	Online Degree	Summer/Certificate Programs
Argentina				X	X			X		
Australia				X	X					
Brazil	X	X	X	X				X		X
Bulgaria			X	X						X
Canada				X	X					
Central America Region			X	X	X		X	X		X
Chile	X			X	X		X	X		
China	X	X	X	X	X		X	X	X	X
Colombia			X	X	X		X	X		X
Czech Republic	X	X		X	X		X			
Denmark				X	X					X
Ecuador	x			x	x			x		
Egypt				X	X				X	
France			X	X			X			X
Finland				X	X					
Germany	X			X	X			X		
Ghana	X	X		X	X	X	X		X	
Hong Kong	X	X	X	X	X		X			
India			X	X	X		X			X
Indonesia			X	X	X		X			
Israel				X	X		X			
Japan		X	X	X				X		
Kazakhstan	X		X	X	X		X	X		X
Kenya	X	X		X	X	X	X		X	
Korea, Republic of		X	X	X	X			X		
Kuwait				X	X			X		X
Malaysia			X	X	X		X			
Mexico	X	X	X	X	X			X		X

BEST STUDENT RECRUITMENT METHODS

Country	Education Agents	Institutional	Student Outreach	Online Outreach
Argentina		X	X	
Australia		X	X	X
Brazil	X	X	X	
Bulgaria	X		X	X
Canada		X	X	X
Central America Region		X	X	
Chile	X	X	X	X
China	X		X	
Colombia	X	X	X	X
Czech Republic	X	X		
Denmark	X	X		X
Ecuador	X	X	X	
Egypt		X	X	X
Finland		X	X	X
France	X	X	X	
Germany	X	X	X	
Ghana	X	X	X	
Hong Kong	X	X	X	
India	X	X	X	X
Indonesia	X	X	X	X
Israel	X	X	X	X
Japan	X	X	X	
Kazakhstan	X	X	X	
Kenya	X	X	X	
Korea, Republic of			X	X
Kuwait		X	X	
Malaysia	X	X	X	X
Mexico	X	X	X	X
New Zealand		X	X	X



Upcoming IEP CTM - Join Us!

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**

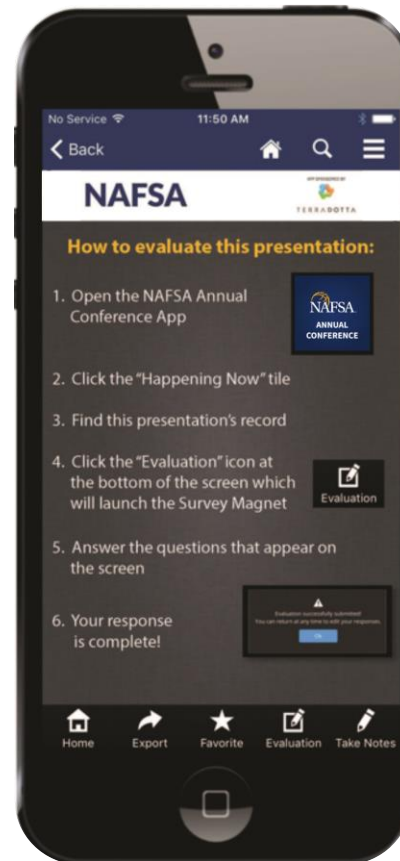


THANK YOU VERY MUCH!

Gabriela Zelaya

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this session
evaluation
NOW!**



**Or FAVORITE now
and EVALUATE later!**