



# IEP Advocacy

Enrollment Trends: IIE Open  
Doors, SEVP, Spring '08  
AAIEP Flash Survey

*2008 TESOL, New York*



# Enrollment Trends

- Diverse Sources/Measures
  - Identifying Intensive English Programs
    - AAIEP
    - UCIEP
  - IIE – Open Doors Survey
  - SEVP – by the numbers
  - AAIEP Flash Survey



# IIE Open Doors

## Methodology

- Collected in the Fall of each year
- AAIEP and UCIEP provide support in collection of data
- Self-Report
- Response Rate for 2007: 170

# IIE Open Doors

Open Doors 2006, 2007

Report on International Educational Exchange

Institute of International Education

## LEADING PLACES OF ORIGIN OF IEP STUDENTS, 2003 - 2006

|         |         | 2003 Total         | 2004 Total | 2005 Total | 2006 Total | % Change  |         |         | 2003          | 2004          | 2005          | 2006          | % Change  |         |         |
|---------|---------|--------------------|------------|------------|------------|-----------|---------|---------|---------------|---------------|---------------|---------------|-----------|---------|---------|
|         |         | Students           | Students   | Students   | Students   | 2003-2006 | 07 Rank | 06 Rank | Student-Weeks | Student-Weeks | Student-Weeks | Student-Weeks | 2003-2006 |         |         |
| 07 Rank | 06 Rank | Place of Origin    |            |            |            |           |         |         |               |               |               |               |           |         |         |
|         |         | <b>WORLD TOTAL</b> | 43,003     | 44,565     | 43,580     | 45,167    | 5.0%    |         |               | <b>TOTAL</b>  | 495,939       | 490,122       | 557,311   | 636,552 | 28.4%   |
| 1       | 1       | Korea, Republic of | 10,412     | 10,386     | 9,612      | 10,026    | -3.7%   | 1       | 1             | Republic of   | 132,965       | 127,591       | 133,549   | 141,336 | 6.3%    |
| 2       | 2       | Japan              | 10,519     | 10,804     | 8,984      | 7,453     | -29.1%  | 2       | 2             | Japan         | 122,084       | 113,358       | 130,426   | 94,649  | -22.5%  |
| 3       | 4       | Saudi Arabia       | 348        | 334        | 1,540      | 5,047     | 1350.3% | 3       | 4             | Arabia        | 5,466         | 4,586         | 20,100    | 126,996 | 2223.4% |
| 4       | 3       | Taiwan             | 4,235      | 5,126      | 4,971      | 4,748     | 12.1%   | 4       | 3             | Taiwan        | 52,707        | 54,774        | 62,696    | 68,868  | 30.7%   |
| 5       | 6       | Brazil             | 1,359      | 1,402      | 1,127      | 1,572     | 15.7%   | 5       | 6             | Brazil        | 11,782        | 11,169        | 7,933     | 14,351  | 21.8%   |
| 6       | 5       | China              | 796        | 1,026      | 1,267      | 1,461     | 83.5%   | 6       | 5             | China         | 9,276         | 11,891        | 19,092    | 18,686  | 101.4%  |
| 7       | 15      | France             | 1,156      | 1,093      | 653        | 1,008     | -12.8%  | 7       | 15            | France        | 10,231        | 8,008         | 5,170     | 7,688   | -24.9%  |
| 8       | 7       | Thailand           | 943        | 1,088      | 1,028      | 975       | 3.4%    | 8       | 7             | Thailand      | 12,899        | 11,998        | 15,281    | 13,105  | 1.6%    |
| 9       | 11      | Turkey             | 1,034      | 1,133      | 826        | 969       | -6.3%   | 9       | 11            | Turkey        | 12,408        | 11,776        | 10,921    | 12,095  | -2.5%   |
| 10      | 8       | Switzerland        | 732        | 729        | 1,001      | 936       | 27.9%   | 10      | 8             | Switzerland   | 6,577         | 6,458         | 9,286     | 9,030   | 37.3%   |
| 11      | 9       | Mexico             | 1,408      | 949        | 984        | 827       | -41.3%  | 11      | 9             | Mexico        | 8,034         | 11,958        | 9,818     | 8,837   | 10.0%   |
| 12      | 10      | Italy              | 883        | 917        | 973        | 769       | -12.9%  | 12      | 10            | Italy         | 8,942         | 4,917         | 6,262     | 4,626   | -48.3%  |
| 13      | 13      | Spain              | 728        | 721        | 708        | 679       | -6.7%   | 13      | 13            | Spain         | 6,200         | 5,348         | 5,299     | 4,420   | -28.7%  |
| 14      | 12      | Colombia           | 858        | 700        | 797        | 668       | -22.1%  | 14      | 12            | Colombia      | 10,850        | 8,777         | 8,710     | 8,429   | -22.3%  |
| 15      | 17      | Venezuela          | 742        | 648        | 387        | 561       | -24.4%  | 15      | 17            | Venezuela     | 8,800         | 7,506         | 4,973     | 8,008   | -9.0%   |
| 16      | 14      | Germany            | 849        | 950        | 694        | 535       | -37.0%  | 16      | 14            | Germany       | 7,266         | 7,622         | 8,571     | 5,704   | -21.5%  |
| 17      | 16      | Vietnam            | 245        | 292        | 630        | 517       | 111.0%  | 17      | 16            | Vietnam       | 2,857         | 4,578         | 7,598     | 9,821   | 243.8%  |
| 18      | **      | Chile              | 344        | 226        | 183        | 340       | -1.2%   | 18      | **            | Chile         | 3,076         | 2,095         | 7,933     | 14,351  | 366.5%  |
| 19      | **      | Hong Kong          | 130        | 366        | 227        | 283       | 117.7%  | 19      | **            | Hong Kong     | 1,711         | 5,158         | 3,852     | 4,244   | 148.0%  |
| 20      | **      | Kazakhstan         | 57         | 43         | 135        | 250       | 338.6%  | 20      | **            | Kazakhstan    | 895           | 495           | 1,151     | 3,730   | 316.8%  |
| *       | 18      | Poland             | 214        | 263        | 376        | 227       | 6.1%    | *       | 18            | Poland        | 2,272         | 3,001         | 4,769     | 2,702   | 18.9%   |
| *       | 19      | Ecuador            | 298        | 205        | 290        | 236       | -20.8%  | *       | 19            | Ecuador       | 3,699         | 2,549         | 3,240     | 2,688   | -27.3%  |
| *       | 20      | Peru               | 269        | 342        | 260        | 168       | -37.5%  | *       | 20            | Peru          | 3,218         | 3,783         | 2,880     | 1,971   | -38.8%  |

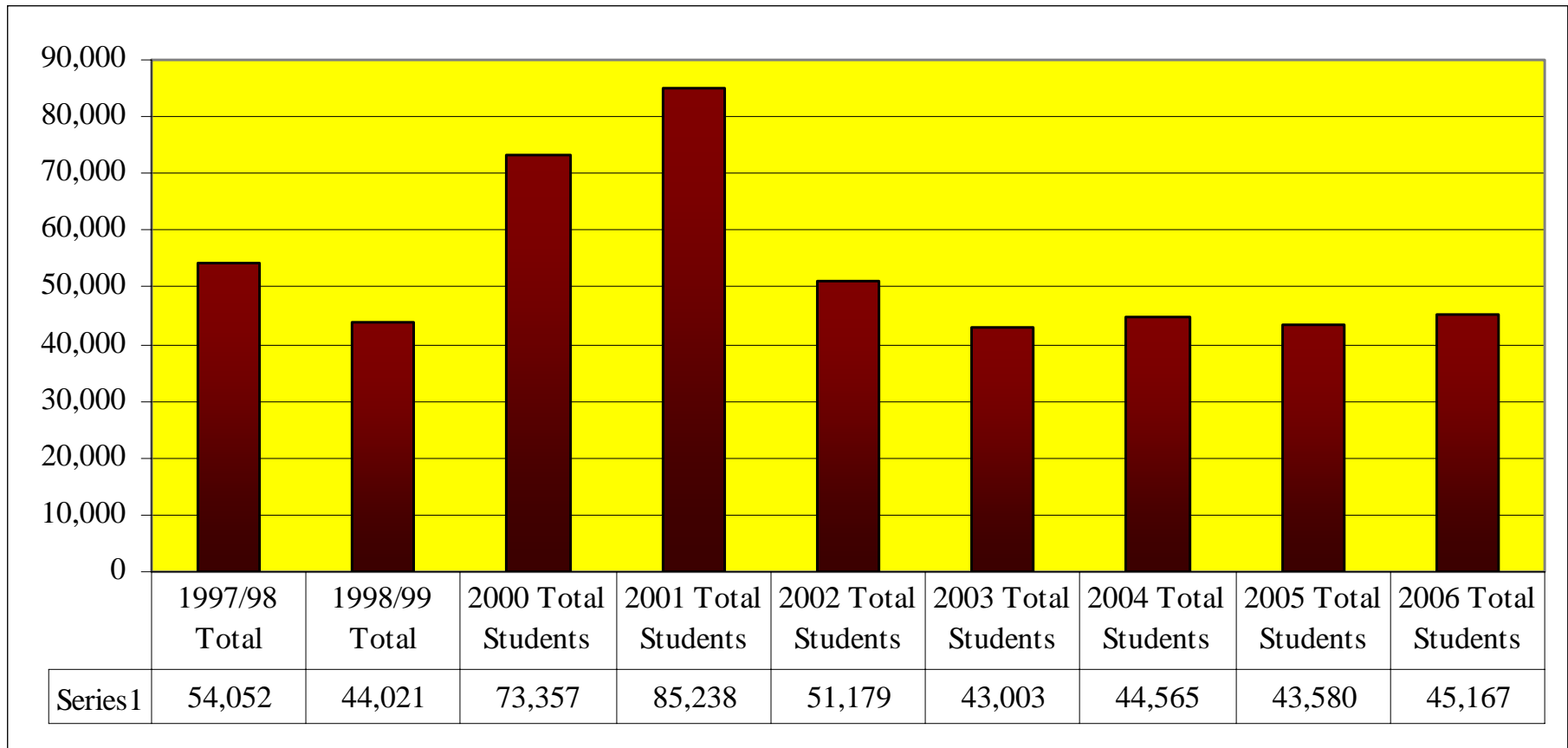
# IIE Open Doors – Numbers

|                |                 | 2003 Total         | 2004 Total | 2005 Total | 2006 Total | % Change  |         |
|----------------|-----------------|--------------------|------------|------------|------------|-----------|---------|
|                | Place of Origin | Students           | Students   | Students   | Students   | 2003-2006 |         |
| <b>07 Rank</b> | <b>06 Rank</b>  | <b>WORLD TOTAL</b> | 43,003     | 44,565     | 43,580     | 45,167    | 5.0%    |
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| 8              | 7               | Thailand           | 943        | 1,088      | 1,028      | 975       | 3.4%    |
| 9              | 11              | Turkey             | 1,034      | 1,133      | 826        | 969       | -6.3%   |
| 10             | 8               | Switzerland        | 732        | 729        | 1,001      | 936       | 27.9%   |
| 11             | 9               | Mexico             | 1,408      | 949        | 984        | 827       | -41.3%  |
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| 14             | 12              | Colombia           | 858        | 700        | 797        | 668       | -22.1%  |
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| 18             | **              | Chile              | 344        | 226        | 183        | 340       | -1.2%   |
| 19             | **              | Hong Kong          | 130        | 366        | 227        | 283       | 117.7%  |
| 20             | **              | Kazakhstan         | 57         | 43         | 135        | 250       | 338.6%  |
| *              | 18              | Poland             | 214        | 263        | 376        | 227       | 6.1%    |
| *              | 19              | Ecuador            | 298        | 205        | 290        | 236       | -20.8%  |
| *              | 20              | Peru               | 269        | 342        | 260        | 168       | -37.5%  |

# IIE Open Doors – Length of Stay

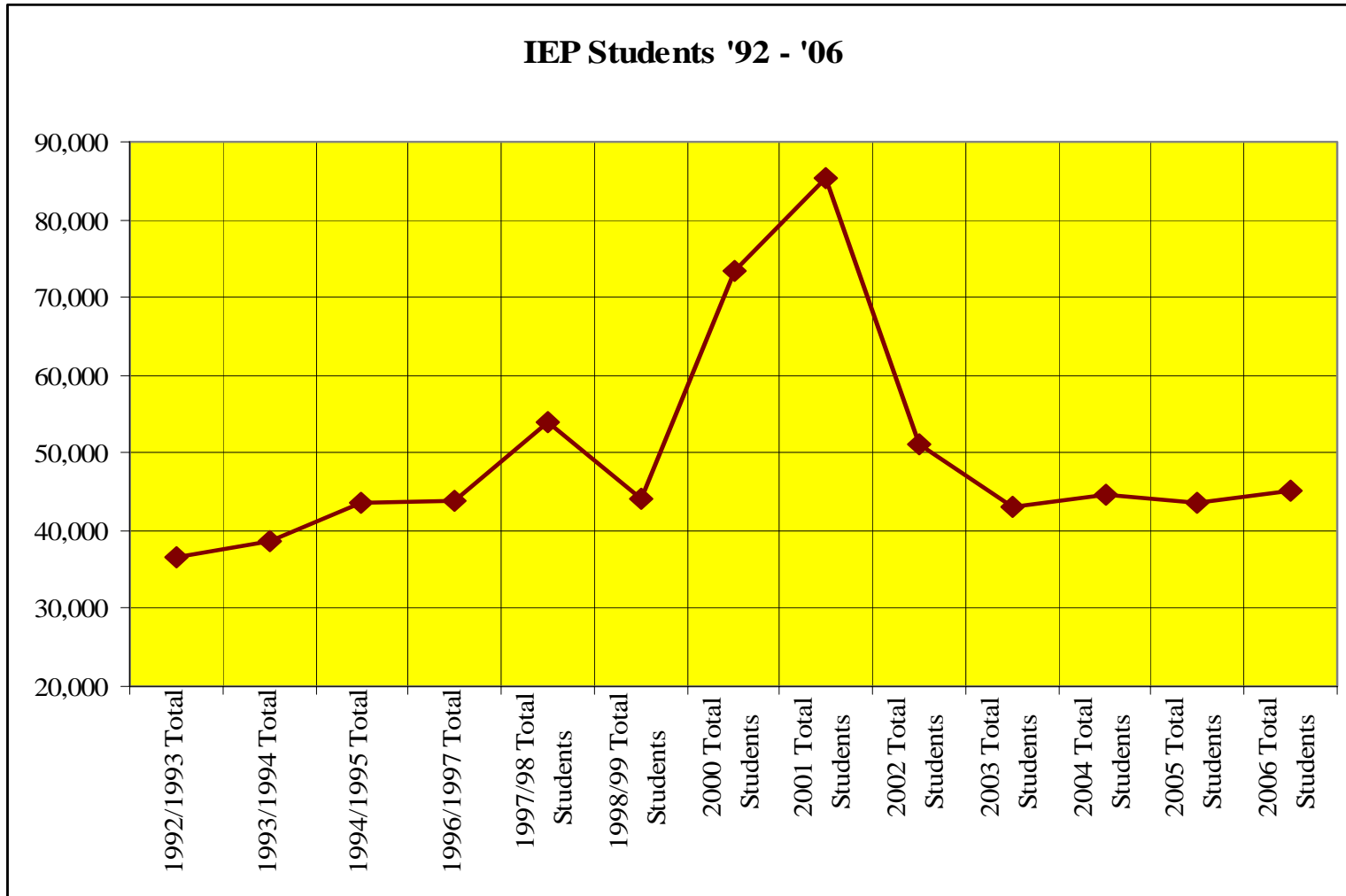
|                |                |                      | 2003<br>Student-<br>Weeks | 2004<br>Student-<br>Weeks | 2005<br>Student-<br>Weeks | 2006<br>Student-<br>Weeks | % Change<br>2003-2006 |
|----------------|----------------|----------------------|---------------------------|---------------------------|---------------------------|---------------------------|-----------------------|
| <b>07 Rank</b> | <b>06 Rank</b> | <b>TOTAL</b>         | 495,939                   | 490,122                   | 557,311                   | 636,552                   | 28.4%                 |
|                | <b>1</b>       | <b>1 Republic of</b> | 132,965                   | 127,591                   | 133,549                   | 141,336                   | 6.3%                  |
|                | <b>2</b>       | <b>2 Japan</b>       | 122,084                   | 113,358                   | 130,426                   | 94,649                    | -22.5%                |
|                | <b>3</b>       | <b>4 Arabia</b>      | 5,466                     | 4,586                     | 20,100                    | 126,996                   | 2223.4%               |
|                | <b>4</b>       | <b>3 Taiwan</b>      | 52,707                    | 54,774                    | 62,696                    | 68,868                    | 30.7%                 |
|                | <b>5</b>       | <b>6 Brazil</b>      | 11,782                    | 11,169                    | 7,933                     | 14,351                    | 21.8%                 |
|                | <b>6</b>       | <b>5 China</b>       | 9,276                     | 11,891                    | 19,092                    | 18,686                    | 101.4%                |
|                | <b>7</b>       | <b>15 France</b>     | 10,231                    | 8,008                     | 5,170                     | 7,688                     | -24.9%                |
|                | <b>8</b>       | <b>7 Thailand</b>    | 12,899                    | 11,998                    | 15,281                    | 13,105                    | 1.6%                  |
|                | <b>9</b>       | <b>11 Turkey</b>     | 12,408                    | 11,776                    | 10,921                    | 12,095                    | -2.5%                 |
|                | <b>10</b>      | <b>8 Switzerland</b> | 6,577                     | 6,458                     | 9,286                     | 9,030                     | 37.3%                 |
|                | <b>11</b>      | <b>9 Mexico</b>      | 8,034                     | 11,958                    | 9,818                     | 8,837                     | 10.0%                 |
|                | <b>12</b>      | <b>10 Italy</b>      | 8,942                     | 4,917                     | 6,262                     | 4,626                     | -48.3%                |
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|                | <b>14</b>      | <b>12 Colombia</b>   | 10,850                    | 8,777                     | 8,710                     | 8,429                     | -22.3%                |
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|                | <b>16</b>      | <b>14 Germany</b>    | 7,266                     | 7,622                     | 8,571                     | 5,704                     | -21.5%                |
|                | <b>17</b>      | <b>16 Vietnam</b>    | 2,857                     | 4,578                     | 7,598                     | 9,821                     | 243.8%                |
|                | <b>18</b>      | <b>** Chile</b>      | 3,076                     | 2,095                     | 7,933                     | 14,351                    | 366.5%                |
|                | <b>19</b>      | <b>** Hong Kong</b>  | 1,711                     | 5,158                     | 3,852                     | 4,244                     | 148.0%                |
|                | <b>20</b>      | <b>** Kazakhstan</b> | 895                       | 495                       | 1,151                     | 3,730                     | 316.8%                |
|                | <b>*</b>       | <b>18 Poland</b>     | 2,272                     | 3,001                     | 4,769                     | 2,702                     | 18.9%                 |
|                | <b>*</b>       | <b>19 Ecuador</b>    | 3,699                     | 2,549                     | 3,240                     | 2,688                     | -27.3%                |
|                | <b>*</b>       | <b>20 Peru</b>       | 3,218                     | 3,783                     | 2,880                     | 1,971                     | -38.8%                |

# IIE Open Doors



Source: Open Doors: Report on International Education Exchange, 1998-2007

# IIE Open Doors – Historical Comparison – 1993/2001





# SEVP by the Numbers

| <b>Students in F Programs</b>                                | <b>May '06</b> | <b>Dec '06</b> | <b>Dec '07</b> |
|--|----------------|----------------|----------------|
| <b>Total Students</b>  | 596,277        | 630,998        | 673,761        |
| <b>Students in Language Training as Type of Program</b>      | 60,676         | 62,591         | 72,198         |
| <b>Students in Basic Skills as a Course of Study</b>         | 49,080         | 49,885         | ***            |
| <b>Students in Second Language Learning (New) as a Major</b> | ***            | ***            | 52,257         |

Source: SEVP by the Numbers ([www.ice.gov/sevis](http://www.ice.gov/sevis)).

“Basic Skills” is the major under which “Second Language Learning (New)” is located in SEVIS. “Basic Skills” was the closest measure available from SEVP on the number of individuals (F1 status) enrolled in IEPs for May and December of 2006.



# SEVP by the Numbers

## Top Ten Countries of Origin - All Students

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| <u>May '06</u> | <u>Dec '06</u> | <u>Dec '07</u> |
|----------------|----------------|----------------|
| South Korea    | South Korea    | South Korea    |
| India          | India          | India          |
| China          | China          | China          |
| Japan          | Japan          | Japan          |
| Taiwan         | Taiwan         | Taiwan         |
| Canada         | Canada         | Canada         |
| Mexico         | Mexico         | Mexico         |
| Turkey         | Turkey         | Turkey         |
| Thailand       | Thailand       | Thailand       |
| Brazil         | Saudi Arabia   | Saudi Arabia   |



# Comparison

|               | <b>2006</b> | <b>Difference</b> |        |
|---------------|-------------|-------------------|--------|
| IIE           | 45,167      |                   |        |
| SEVP          |             |                   |        |
| Lang Training | 62,591      | 38.6%             | 17,424 |
| Basic Skills  | 49,885      | 10.4%             | 4,718  |



# Comparison

## **SEVP '06**

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South Korea

India

China

Japan

Taiwan

Canada

Mexico

Turkey

Thailand

Saudi Arabia

## **IIE '06**

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South Korea

Japan

Saudi Arabia

Taiwan

Brazil


China

France

Thailand

Turkey

Switzerland



# Responses – First Glance

## 80 Responses – 30% of Membership Background on Respondents

### Region of the U.S.


|         |            |
|---------|------------|
| Eastern | 36.3% (29) |
| Central | 21.3% (17) |
| Western | 42.5% (34) |

### Type and Population of Location

|                                    |            |
|------------------------------------|------------|
| Large Urban Area (1 million plus)  | 37.5% (30) |
| Medium Urban Area (500k to 1 mill) | 21.3% (17) |
| Small Urban Area                   | 33.8% (27) |
| Rural                              | 7.5% (6)   |

### Popular for Vacationers

|     |            |
|-----|------------|
| Yes | 76.3% (61) |
| No  | 23.8% (19) |



# Responses – First Glance

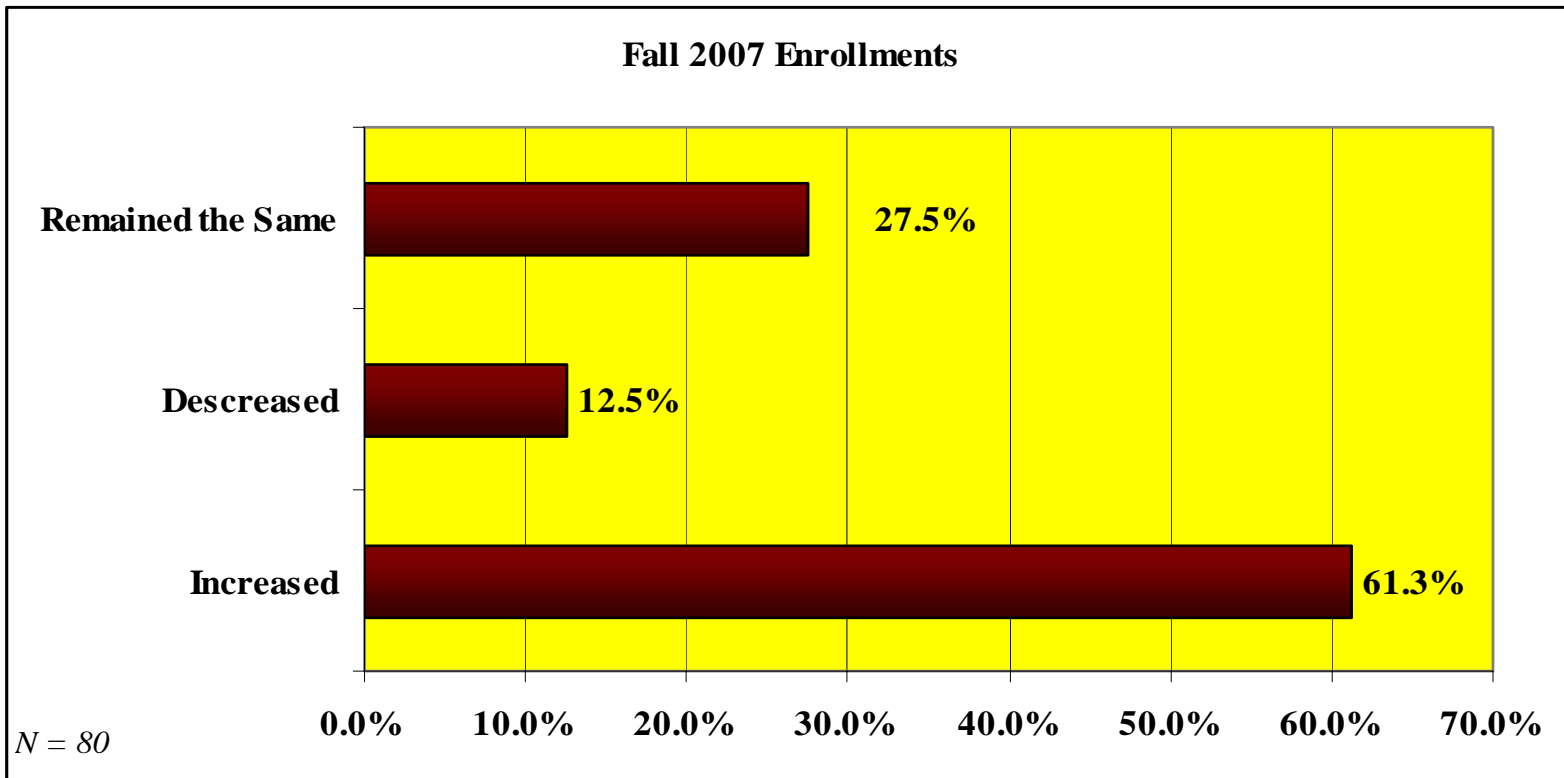
## Size of IEP by Avg Enrollment

|              |            |
|--------------|------------|
| Less than 25 | 6.3% (5)   |
| 26-50        | 23.8% (19) |
| 51-75        | 15.0% (12) |
| 76-100       | 21.3% (17) |
| 101-125      | 7.5% (6)   |
| 126-150      | 12.5% (10) |
| 150+         | 13.8% (11) |

## IEP Institution Type

|                                      |            |
|--------------------------------------|------------|
| University owned and operated        | 52.5% (42) |
| Proprietary on University campus     | 23.8% (19) |
| Proprietary not on University campus | 20.0% (16) |
| Community College                    | 3.8% (3)   |

# Fall '07 Enrollments



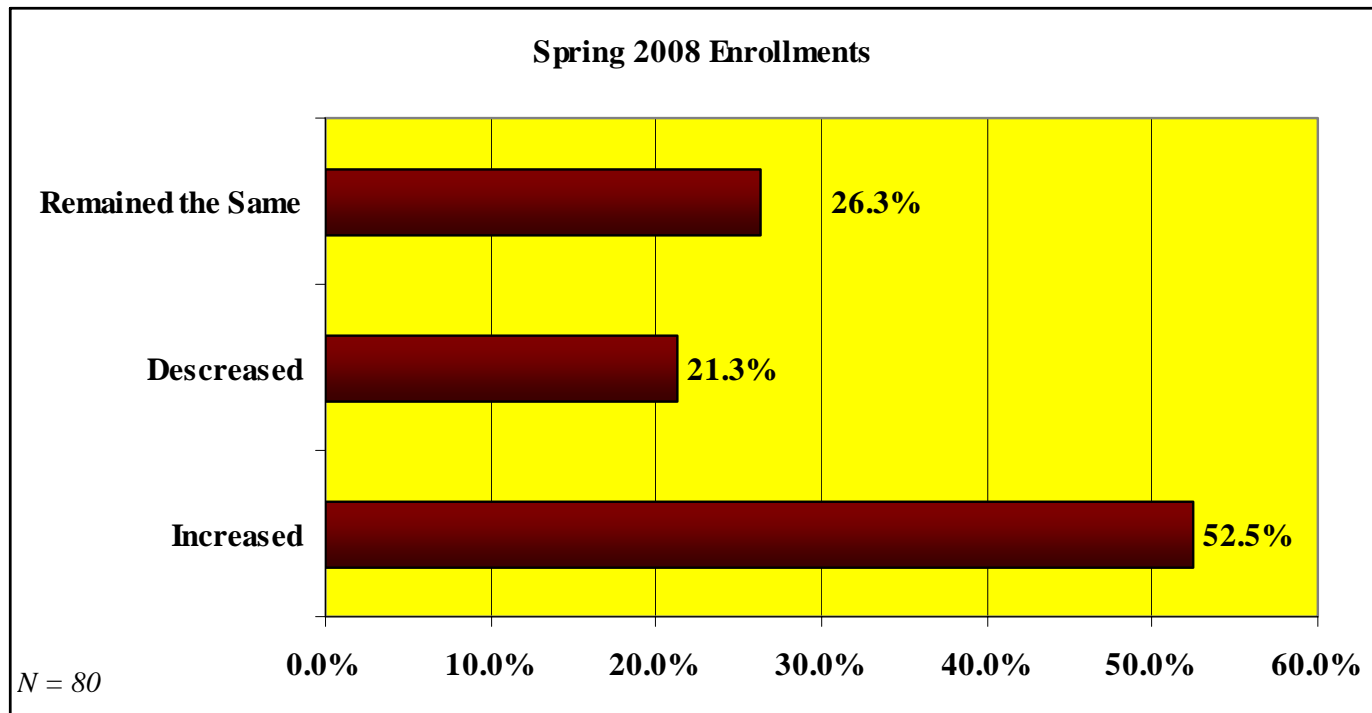


# Fall '07 Enrollments

## Fall Enrollments - Amount of Change

| <b>Percent Change</b> | <b>IEPs that<br/>Increased</b> | <b>IEPs that<br/>Decreased</b> |
|-----------------------|--------------------------------|--------------------------------|
| <b>1-10%</b>          | 27.1% (13)                     | 55.6% (5)                      |
| <b>11-25%</b>         | 41.7% (20)                     | 44.4% (4)                      |
| <b>26-50%</b>         | 27.1% (13)                     | 11.1% (1)                      |
| <b>50% +</b>          | 4.2% (2)                       | 0.0% (0)                       |
| <b>N</b>              | <b>48</b>                      | <b>9</b>                       |

# Spring '08 Enrollments





# Spring '08 Enrollments

## Spring Enrollments - Amount of Change

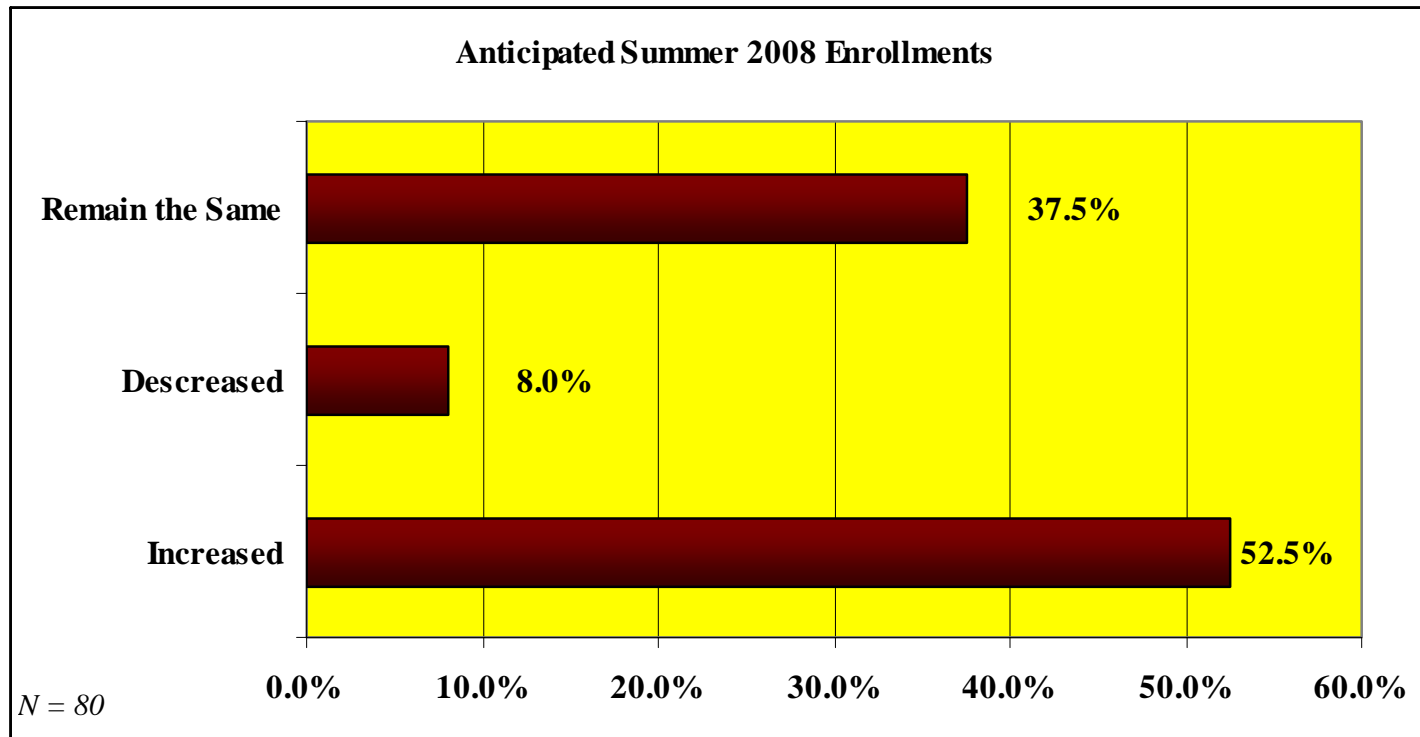
| <b>Percent Change</b> | <b>IEPs that<br/>Increased</b> | <b>IEPs that<br/>Decreased</b> |
|-----------------------|--------------------------------|--------------------------------|
| <b>1-10%</b>          | 34.1% (14)                     | 0.0% (9)                       |
| <b>11-25%</b>         | 41.5% (17)                     | 0.0% (6)                       |
| <b>26-50%</b>         | 22.0% (9)                      | 0.0% (1)                       |
| <b>50% +</b>          | 2.4% (1)                       | 0.0% (1)                       |
| <b>N</b>              | <b>41</b>                      | <b>17</b>                      |



# Spring '08 Enrollments Cont'd

Factors identified in the change in enrollment were: the Saudi Population (decrease and transfers), China, change in perception towards US visa policy, a very weak dollar, focus on retention, and marketing of the IEP

# Summer '08 Enrollments Projected





# Summer '08 Enrollments Projected

## Summer Enrollments - Anticipated Change

| <b>Percent Change</b> | <b>IEPs that<br/>Increased</b> | <b>IEPs that<br/>Decreased</b> |
|-----------------------|--------------------------------|--------------------------------|
| <b>1-10%</b>          | 48.8% (21)                     | 57.1% (4)                      |
| <b>11-25%</b>         | 39.5% (17)                     | 14.3% (1)                      |
| <b>26-50%</b>         | 11.6% (5)                      | 28.6% (2)                      |
| <b>50% +</b>          | 0.0% (0)                       | 0.0% (0)                       |
| <b>N</b>              | <b>43</b>                      | <b>7</b>                       |



# Summer '08 Enrollments Projected

Primary factors identified in the projected changes in enrollments were marketing and the weak dollar.



# What does it all mean?

- IEP enrollment is on the rise, but not to pre-9/11 numbers for the market as a whole
- Perceptions of the US visa policy are changing – though the wait times are still substantial
- New Markets, especially China, are opening up for IEPs



# Knowing the Numbers

- Students
- Programs
- Other areas that impact IEPs:
  - Visa numbers
  - Currency Exchange
  - Global Trends



# Visa Statistics

## F1 Visas - Worldwide

|      | Issued  | Refused | Total Applicants | Waived/Overcome | Refusal Rate |
|------|---------|---------|------------------|-----------------|--------------|
| 2007 | 298,389 | 133,991 | 432,380          | 39,763          | 44.9%        |
| 2006 | 273,870 | 111,726 | 385,596          | 42,640          | 40.8%        |
| 2005 | 237,890 | 95,271  | 333,161          | 36,376          | 40.0%        |
| 2004 | 218,898 | 92,599  | 311,497          | 28,839          | 42.3%        |
| 2003 | 215,695 | 117,013 | 332,708          | 42,973          | 54.2%        |
| 2002 | 234,322 | 118,856 | 353,178          | 30,500          | 50.7%        |

Source:[http://travel.state.gov/visa/frvi/statistics/statistics\\_1476.html](http://travel.state.gov/visa/frvi/statistics/statistics_1476.html)

# Advocacy areas

| 17. Please rate the following advocacy issues on their importance to the IEP industry, using a scale from 1 to 5, with 5 being an issue to strongly support.      |                          |           |            |                   |                   |                |                |
|---|--------------------------|-----------|------------|-------------------|-------------------|----------------|----------------|
|   | 1                        | 2         | 3          | 4                 | 5                 | Rating Average | Response Count |
| Advocate for language programs to be accredited in order to receive SEVP certification  | 7.1% (5)                 | 2.9% (2)  | 20.0% (14) | 17.1% (12)        | <b>52.9% (37)</b> | 4.06           | 70             |
| Advocate that Congress rescind 214(b)   | 7.3% (4)                 | 14.5% (8) | 25.5% (14) | <b>29.1% (16)</b> | 23.6% (13)        | 3.47           | 55             |
| Advocate to close the regulatory loophole that allows F1 students to transfer prior to attending the program on whose I-20 the student initially entered the U.S. | 13.5% (10)               | 8.1% (6)  | 14.9% (11) | 21.6% (16)        | <b>41.9% (31)</b> | 3.7            | 74             |
| Advocate that Congress lower or eliminate the SEVIS fee for short-term study (90 days or less)  | 2.9% (2)                 | 10.0% (7) | 10.0% (7)  | <b>38.6% (27)</b> | <b>38.6% (27)</b> | 4              | 70             |
| Advocate that Congress restore authority to Consular officers to grant interview waivers for visa applicants and trusted travelers                                | 1.4% (1)                 | 2.8% (2)  | 15.3% (11) | 36.1% (26)        | <b>44.4% (32)</b> | 4.19           | 72             |
| Advocate that Congress and DOS promote education in the U.S. as part of a strategic plan for educational exchanges  | 2.7% (2)                 | 1.4% (1)  | 6.8% (5)   | 23.0% (17)        | <b>66.2% (49)</b> | 4.49           | 74             |
|   | <i>answered question</i> |           |            |                   |                   |                | 74             |
|   | <i>skipped question</i>  |           |            |                   |                   |                |                |