

What is the Industry saying?

Schools moving online

- Campus closures: So far, we're seeing [~140 University closures and growing rapidly](#). As of February 2020, [40%](#) of US internet users report planning to avoid schools/colleges if the Coronavirus outbreak worsens in the US (*18ppt higher than those reporting that they are already avoiding*).
- Institutional sentiment: Overall, only [46%](#) of professors have taught a course online and the ecosystem is moving quickly to build capabilities. See [here](#) for remote teaching guidelines shared broadly in industry right now and [updated in real-time by various schools - some of our clients](#)
 - Keep in mind: ~ 31% of graduate students and 14% of undergraduate students attend fully online programs in the U.S.

Economic Impact

- Too early to call the impact to admissions although winners could emerge: According to BMO, publicly held companies owning and/or helping institutions with online programs could benefit, including American Public Education (APEI), Strategic Education (STRA), Grand Canyon University (LOPE), and 2U (TWOU).
 - As of 3/15, at least three dozen colleges have [pushed back their admission deposit](#) deadline by a month with many more poised to do so this week.
 - Students are wondering if/when they will be reimbursed for room & board fees. Colleges rely on this auxiliary fee to support operating revenue. On average private institutions are [discounting by ~50%](#) so, Art & Science Group (a higher-ed consulting firm) projects this could add to financial stress.
 - [A wealth gap may be emerging](#) between schools that choose to cancel in-person classes or those that remain open, based on available endowment.
- International student enrollment: The [1.1 million international students](#) in the United States contribute \$41 billion annually to the American economy. For every 7 international students enrolled in the US, [3 jobs are created and then supported by spending](#).
 - Chinese students represent [~41%](#) of international students
 - In a survey released on March 5th by the Institute of International Education, [three-quarters of colleges](#) said that outreach to and recruitment of Chinese students had been affected by Covid-19.

Coronavirus & Higher-Education

Quotes from the industry and how Google is supporting

What is top of mind for students?

153 respondents currently enrolled in a university or college degree program surveyed, A18-54

91%

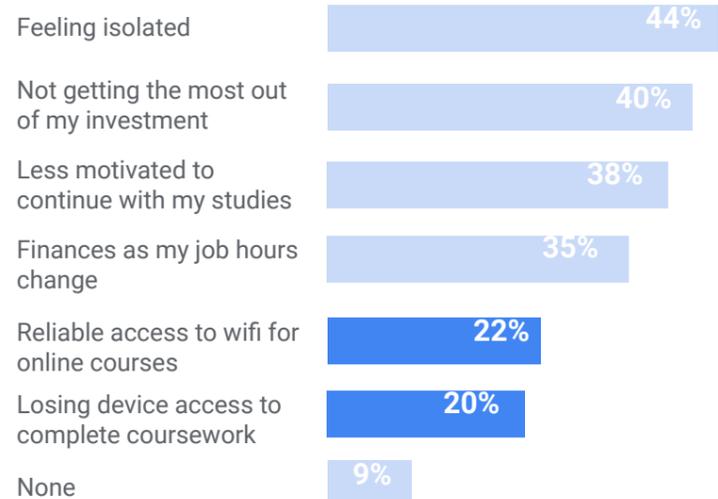
say their school plans to close campus and/or move classes online as a result of COVID-19

47%

say their classes haven't started yet (31% said yes, 22% were already taking courses online)

44% are supportive of the move to online courses

Which of the following has impacted your daily life? A18-54 n=153, 330 responses



What have you found surprising after making the switch to online? A18-54 n=153, 218 responses

53%

say greater control over their schedule

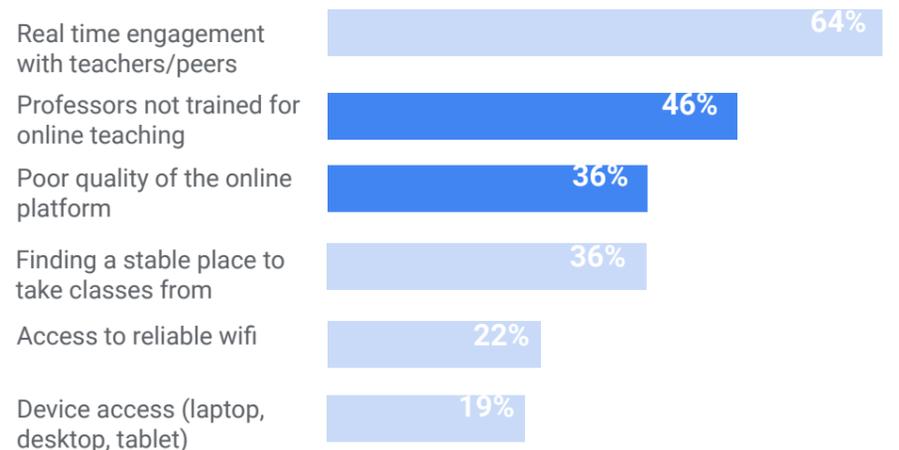
46%

say not having a commute gives them more study time

23%

say they are more focused with less classroom distractions

What makes learning online challenging? A18-54 n=153, 356 responses



Google Consumer Surveys, March 2020

How is Google helping?

- [Enabling productivity for remote workers and students](#): free access to advanced Hangouts Meet video-conferencing capabilities to all G Suite and G Suite for Education customers globally until July 1, 2020. We're also adding resources to be able to support increased demand for public livestreaming on YouTube.
- [Helping people find useful information: SOS Alert](#) in Search connects people with the latest news plus safety tips and links to more authoritative information from the World Health Organization (WHO). Similar functionality on YouTube and Google Maps.
- [Google Trends](#): check top keywords or your brand in real time
- Education focused:
 - Explore Google's distance learning resources for K-12 through higher-ed [here](#)
 - Relevant learning content on the [YouTube Learning Hub](#)
 - [Webinars](#) & [Blog Posts](#) on moving to online learning