

Education

*Trends & Insights
into the UK Market*

August 2014





The acceleration of technology, connectivity and proliferation of devices has proved disruptive for many sectors, and education is no different. Traditional education institutions, more than ever, have to be alert and open to the global opportunities that online courses offer themselves and students alike and institutions also need to have a clear strategy on how they view the impact of Massive Open Online Courses (MOOCs) on more traditional learning methods.

At Google we are fortunate to have a huge amount of data at our disposal from which we can gain significant insights into consumer sentiment and the online behaviours surrounding Education. As a new team in the UK we feel really fortunate to be in the industry at such an exciting time as the internet increases both the quantity and quality of education options available to the increasingly connected world.

Many new players and business models are entering the industry, and student behaviour is changing too. In this report Jenny, our analyst for the Education sector, uses Google's internal search data to look at three areas in particular. Firstly, we look at how the landscape is changing and in particular the online vs traditional model. Secondly, following on from our recent study with the OC&C Strategy Consultants, we look at the international opportunity available to education institutions before finally taking a deepdive into the MOOC world from both a search point of view but also from our own experiences having enrolled in courses ourselves!

Our intent is to produce a bi-annual report that not only shares query trends, which you will see at the back of the report, but also gives a view of what we are seeing more broadly across the sector. We hope you enjoy the report and would welcome feedback on what you'd like to see more of, in terms of data and any other specific topics you would like a data driven view on, so please do contact any of the team on the details below.

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Please note that all of the query charts we show have been indexed, unless otherwise stated, and therefore should be used as an indication of growth and not as an indication of absolute search volume. We note also that the queries we have used are predominantly English, and the global data we present may therefore be skewed towards English speaking regions.

Education is changing - Massively

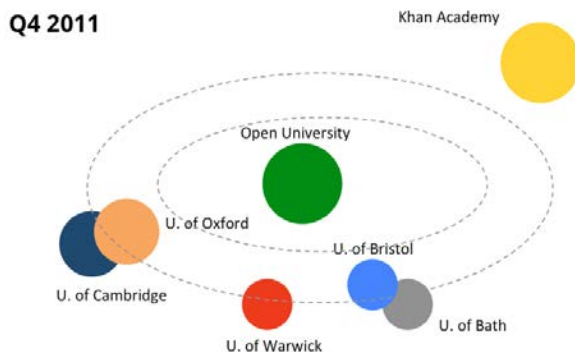
Shifts in technology are proving disruptive across many economies and sectors, and education is no different. The landscape is changing rapidly, and in this report we will use Google's internal search data to try to capture some of these changes.

Our data, shown throughout this report and in our Global and UK query trends on pages 16 - 21, show the change in Google search volume for buckets of queries (search terms) which we have pre-defined based on the top search terms within each category. We use this to give us a picture of the demand that exists for education: in particular the areas of education that are seeing large growth in demand, where the growth is coming from, and how factors like these are affecting the overall education landscape.

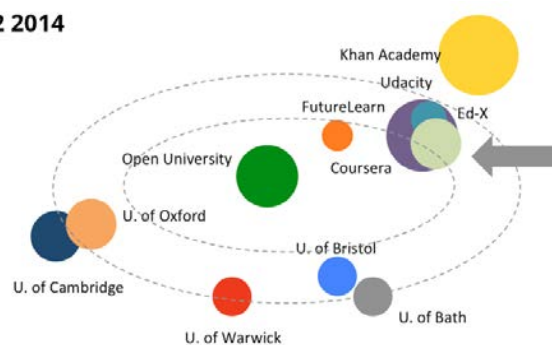
The Changing Landscape

The charts below show a snapshot of the education landscape that we see within our search data at two different points in time. Each bubble on the chart represents a different education brand (and we've just chosen a few here that we think represent a relevant breadth of education providers). The size of each bubble represents the global query volume for that brand (the bigger the bubble, the more Google searches for that brand in the given quarter); and how close the bubbles are to one another represents their brand similarity, or in other words, how likely it is that they will be searched together in the same search session.

Education landscape: Q4 2011



Education landscape: Q2 2014



Source: Google internal data, global searches

So in the chart on the left-hand side, which shows the picture back in Q4 2011, we can see that Oxford and Cambridge have a similar search volume, and are often searched together in the same search session. Bath and Bristol are also often co-searched, which we'd expect given their similar UK rankings and their geographical proximity. We can also see the not-for-profit online education provider - Khan Academy - on the edge here with large search volumes, but a distance away from the other bubbles - showing no real association with the traditional UK universities.

Fast forward two and a half years to today, and the chart on the right-hand side shows a somewhat different landscape. Massive Open Online Courses (MOOCs) - the likes of Coursera, EdX, Udacity and FutureLearn - have all emerged as big players within the industry (they don't appear on the first chart simply because their search volume in 2011 was not significant enough when compared with our globally recognised UK universities). The growth that they've experienced has been phenomenal. It is interesting to note too that FutureLearn - the UK MOOC which is wholly owned by the Open University (OU) - lies somewhere between the other MOOC providers and the OU - it is likely to be searched both alongside the OU, and alongside the likes of Coursera, Udacity and EdX.

This huge growth in MOOCs and the global reach they now have is just one change which higher education institutions must decide whether to embrace and adapt to, or risk getting left behind. We discuss this in more detail later in the report, but we firstly look at two other key changes: (1) The rise in the wider online education market; and (2) The growing international opportunity for traditional UK higher education.

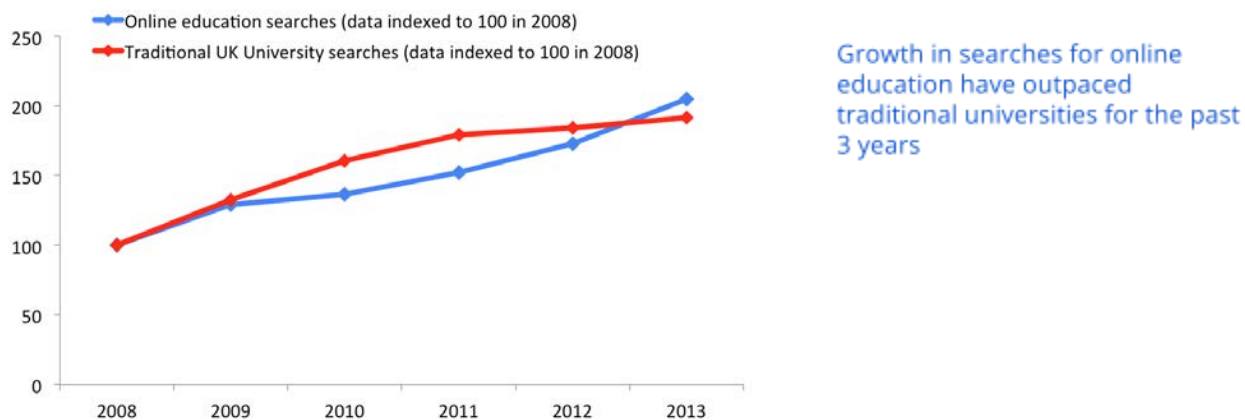
The Shift to Online

Distance learning and online education are not new concepts: The Open University launched in 1969 - founded with the belief that communications technology could bring high quality learning for people who hadn't had the opportunity to attend traditional universities - and the University of Phoenix began offering online degrees in 1989. However, it is true that online education has grown in prominence over the last few years, as the rise of MOOCs and the likes of the Khan Academy have drawn increasing interest to the wider online sector.

The chart below shows the growth in global searches for online education (online courses, online degrees, distance learning etc) against the global searches for traditional UK Universities (we take the bricks and mortar universities currently within the UK). We can see that the growth in searches for online learning has outpaced the growth in traditional university searches for the past 3 years - a trend which

has continued into 2014 with global searches year to date for online education *up* 11%, vs. Traditional UK universities *down* 5%.

Online education vs. Traditional UK universities - global search trends (both data series are indexed to 100 in 2008 and therefore represent growth and not relative volumes)



Source: Google internal data

With tuition costs rising and as smarter solutions are developed via the web such as personalised and adaptive learning, we expect the online education sector to continue to grow. For traditional educators, we'd expect to see a wider move towards "blended learning" - a mix between traditional bricks and mortar higher education and tech-aided/online learning.

The International Opportunity for UK Higher Education

The global education market is estimated to be worth almost £3trn annually¹ - making it the second biggest sector in the world. The export opportunity within the UK education space has been widely documented - BIS research estimates that the value of UK education export will be £21.5bn by 2020².

Our own data shows increasing opportunity for UK institutions to export: The chart below shows growth in searches for UK Universities, split out to show those searches coming from within the UK (domestic searches), and those coming from abroad (international searches). We show the domestic searches

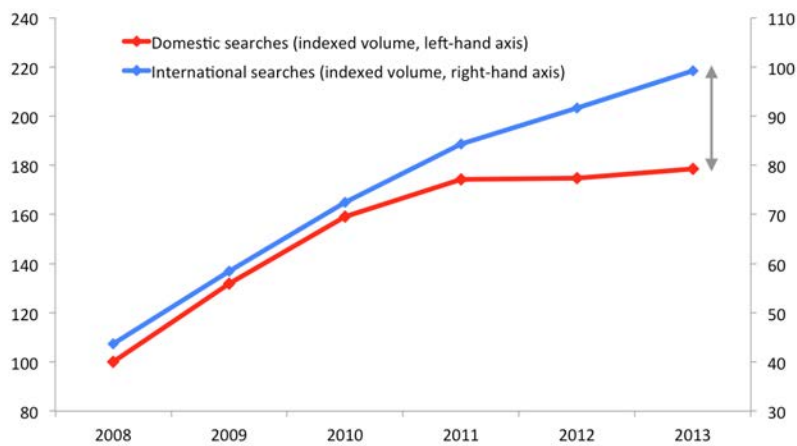
¹Education Factbook. GSV: <http://gsvadvisors.com/wordpress/wp-content/uploads/2012/04/GSV-EDU-Factbook-Apr-13-2012.pdf>

² <https://www.gov.uk/government/publications/education-exports-estimating-their-value-to-the-uk>

indexed on the left-axis, against international searches on the right-axis. We find that growth in searches for traditional UK universities is driven by international searches, which over the past 3 years have grown by an average of 7 pts per year *more* than domestic searches. This strong growth we've seen in international searches means that these now account for an estimated 40% of all searches for UK universities.

While there are clearly challenges UK institutions face in export - higher tuition fees and changing visa regulations to name just two relatively recent changes - importantly the demand for and recognition of these UK education brands internationally is strong and growing.

UK Universities: Domestic vs. international searches (indexed)



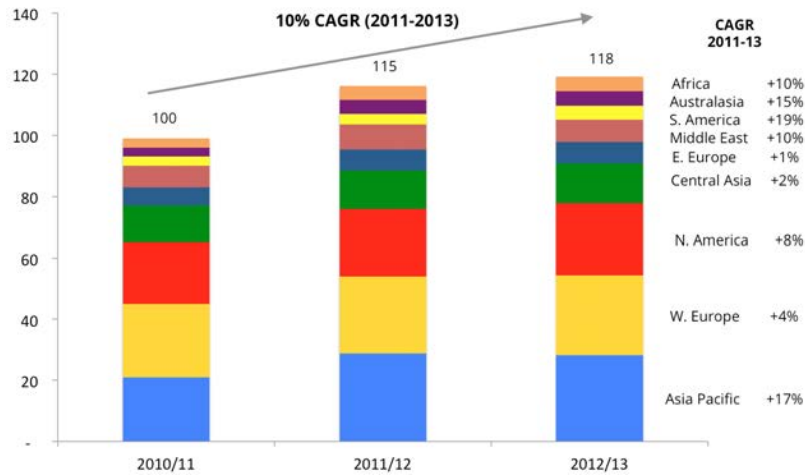
40%
of all UK university searches now come from outside the UK

Source: Google internal data

For further information on the export opportunity for UK Institutions please see "[Britain's Higher Education Empire](#)", a report launched in December 2013 by Google UK and OC&C Strategy Consultants, using Google's search data to look in detail at the internationalisation of Higher Education within the UK.

The chart below is taken from the study and shows a breakdown of the searches for UK universities by region, and how this has grown over the past 3 years. We see strong growth across all regions, with Asia Pacific and South America standing out in particular.

Searches for UK Universities by country of origin, indexed to 100 in 2010/11



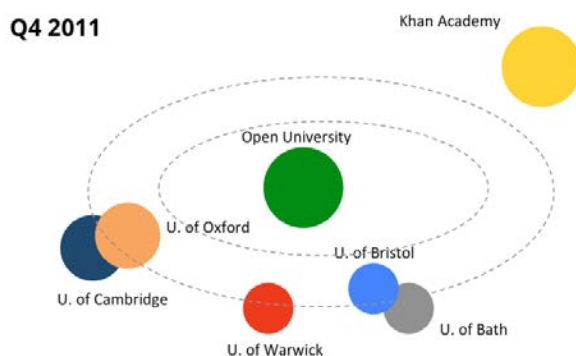
The OC&C Strategy report from December 2013 showed Asia Pacific and South America particularly driving growth in international searches for UK Universities

Source: OC&C Strategy Consultants, Google internal data, based on the Top 50 UK Universities as provided by the Times Good University Guide 2013.

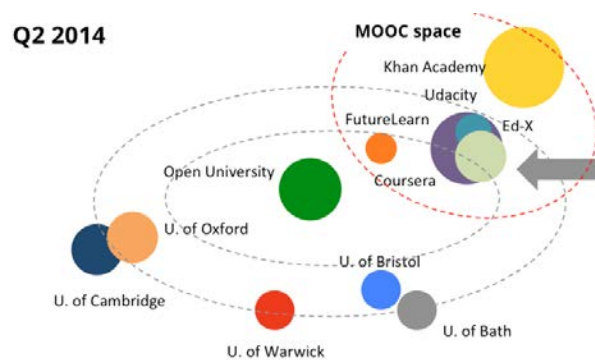
A deep-dive into MOOCs

Our opening charts of this report - shown again below - explored the change we've seen in the education landscape, as we see it within our search data. The transformational element over the past 2 and a half years - and one which has captured the attention of investors, analysts and importantly students - has been the entrance of the Massive Open Online Courses (MOOC) space. We explore in a bit more detail below the rise of MOOCs - which we see as a key and growing part of a wider move towards online education.

Education landscape: Q4 2011



Education landscape: Q2 2014



Source: Google internal data, global searches

The background. What is a MOOC?

To us MOOCs represent courses, available and accessible to everyone everywhere via the internet. They exist largely with the mission of delivering a world-class education to everyone around the world. Crucially, MOOCs are almost always free, or very low cost. We note too that "MOOC" is also often used to refer to a MOOC provider - we will use "MOOCs" referring to both Massive Open Online Courses *and* the online institutions which deliver them.

The courses are based on the best content from the best providers (the most well-known MOOCs have partnered with the likes of Harvard, MIT and Stanford in the US, and The Universities of Edinburgh, Bath and Warwick within the UK). There is a wide range of courses on offer (the 4 providers we look at below currently offer nearly 1000 different courses between them) - covering everything from Astrophysics to the Arts. Just as with bricks and mortar universities, the courses only run at specific times of the year; they usually last somewhere in the region of 8 weeks, with anywhere from 1 to 12 hours work required per week (which is done in your own time). The course material is largely online video, but can also

involve a wide range of other technologies which we'll touch on when we give a run-down of our own MOOC learning experience.

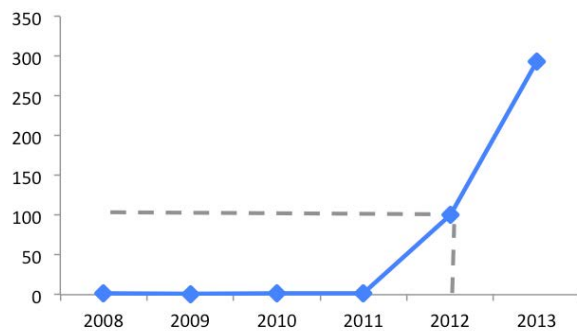
The key players and what they offer

- **Coursera** is perhaps the most well known and largest MOOC. Coursera partners with universities worldwide including Duke, Brown and Stanford in the US, Peking University in China, and the University of London. There are currently c. 670 courses available.
- **EdX** was created by MIT and Harvard Universities. It partners with a range of universities globally including Berkeley, Cornell, IIT Bombay and the University of Notre Dame. There are currently c. 200 courses available.
- **Udacity** was born out of a Stanford University experiment in which Sebastian Thrun and Peter Norvig offered their "Introduction to Artificial Intelligence" course online to anyone, for free. There are currently c. 40 courses available.
- **FutureLearn**: in 2012, Open University launched FutureLearn, partnering with more than 20 UK and International Universities including the Universities of Warwick, Edinburgh and Bath, as well as other cultural institutions, like the British Library and the British Museum. There are currently c. 45 courses available.
- **Google Course-Builder** - Google's open-source online education platform. In July 2013, Google held the course "Power-searching with Google", created using Course-Builder. It had over 150,000 registered students from 196 countries, and since then, organisations around the world have used Course-Builder to build their own online courses.

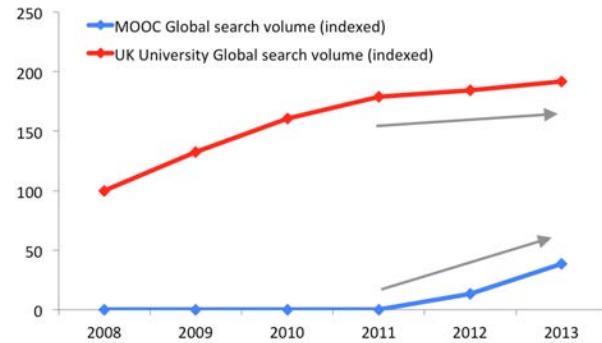
Believe the hype - MOOC queries are growing fast

The chart below-left shows the indexed volume of global searches over time for MOOC-related search terms. These grew by nearly 200% yr/yr in 2013, and are up 29% yr/yr year-to-date. For reference we also show in the chart below-right MOOC search volume alongside traditional UK University search volume, which has remained relatively flat - we would note though that while MOOC volumes are growing fast, relative to the wider traditional education space, we estimate total volumes are still relatively small.

MOOC related global searches (indexed*)



UK Universities global searches (indexed) with relative global MOOC volumes



Source: Google internal data. * Note: MOOC search volumes are indexed to 100 in 2012 to account for accelerated search growth in 2012/2013. Please see page 16 for further details.

But what's a MOOC like in practice?

The Google team are well on our way to completing our first MOOC. We'll give our personal views and experiences below, but we'd also urge readers sign up for one too - learn something new and see first hand what's on offer:

- **Dropout rates and how to interpret them:** This is our third attempt at trialling a MOOC, which perhaps says a lot: the factors which make a MOOC attractive (it's free, there's no real commitment required when you start), make it very easy to drop out. We admit we never made it to the first lecture of our first course, with work and other commitments getting in the way. We started the second - a course on Global Business Trends - which was interesting and after the first few lectures we had a good understanding of the basic concepts, but we decided it just wasn't for us and we stopped about a third of the way through. Much has been made of the dropout rate of MOOCs - widely thought to be somewhere in the region of 90%, and this is a statistic that we have contributed to. But of course it works the other way around too - being able to drop out of MOOCs easily and without consequence is a big plus point - it means there's little to stop you from giving it a go, and this is surely in part what have made MOOCs so successful, with courses attracting on average 20,000 students and some courses attracting over 100,000 students. In the case of our second course, we enjoyed the videos we watched and we learnt something new - which was really our main goal. In the case of the first course which we enrolled on - we never tried to give it a go in any meaningful way. There's still much to be done in making sense of the statistics of MOOCs.

- **Social aspects of learning in a MOOC:** Our MOOC experience has been surprisingly sociable. Each module of our course had thousands of comments and discussions, with options to like, reply to, and follow the author. There was also an active twitter hashtag, with big spikes in activity after each week's course material was uploaded.
- **How is it taught?** The course formats have varied by module. In some videos the course lecturer speaks directly into the camera, but there are also videos from experts in the field, real life voice and video recordings, puzzles, quizzes and interactive exercises. We were also offered live chats with leading researchers in the field on other social networking sites.
- **Exams and Credentialisation:** While we haven't reached the end of the course yet, we are reminded each week of the possibility to credentialise the course by buying a certificate. We're tested every week and the test scores will contribute to our final result. Some MOOCs also offer students the chance to attend a proctored exam in person or online with a microphone and webcam. Others offer different ways of verifying that it is you completing the coursework e.g. Coursera's "Signature Track" which records your unique typing pattern. Credentialisation is key to MOOCs' success: if employers start to accept MOOC certification as having value within the job-market, we believe MOOCs will become a very real alternative to traditional higher education.
- **Is it an effective learning environment?** This is perhaps the most important question - after all, MOOCs were founded with a vision that everyone should have access to a world-class education. From our perspective, the course has definitely delivered high quality teaching. We had little knowledge of the subject before we started, and we could now explain the concepts we've studied, and importantly, we enjoyed learning something new.

Exploring Google Trends and a closer look at the Khan Academy

Our search landscape bubble charts showed the Khan Academy as one of the most dominant education brands but really "one-of-a-kind" in terms of search similarity with the other education brands we looked at. The Khan Academy is a not-for-profit education provider created in 2006 by Salman Khan. We note that we don't include the Khan Academy in our MOOC query lists since for us it does not represent a MOOC in the sense of providing a complete course (and Salman Khan has himself said that it does not represent a MOOC). Nevertheless it is an organisation that for many marks the start of the rise of MOOCs and modern online learning.

While there aren't really defined complete courses in the Khan Academy, there is a lot of content - over 5,000 videos, each around 10 minutes long. Everything from Basic Counting right up to degree level

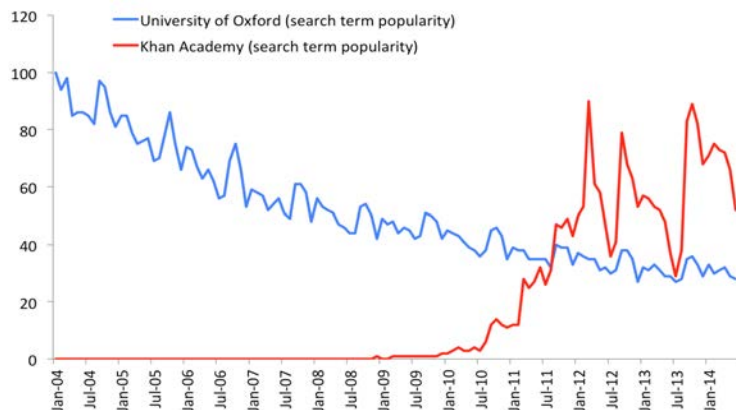
Multivariable Calculus, Art History, Philosophy - the depth and breadth of the content available is astounding, and we'd encourage readers if they haven't already to have a look at what's on offer. There are exercises to complete which you can trace on a galactic themed "Knowledge Map" (well worth a look!), and students can receive badges and energy points as they progress further through the subject material. The Khan Academy has also used technology to introduce adaptive learning techniques, such as pre-testing, where you can take a test to determine at which level you might need to start a particular subject.

The Khan Academy is a great learning experience, but with a real sense of purpose too: there are many case studies and examples of the Khan Academy being used within schools and the real-time data and adaptive learning technologies in use will surely play a large part in the future of all learning.

Our chart below, graphed using Google trends (externally available at www.google.com/trends) shows the meteoric rise in popularity of the Khan Academy. We show it against the University of Oxford search term, which we can see the Khan Academy is now sitting well above in terms of global search popularity.

We note that unlike our query data, our Google Trends chart shows search popularity and not indexed search volume. The data below therefore reflect how many searches have been done for a particular term, relative to the total number of searches done on Google over time.

Google trends - University of Oxford vs. Khan Academy (Global search popularity - normalised data)



Khan Academy's search popularity is well ahead of the University of Oxford - showing the phenomenal growth the educator has seen over the past 6 years

Source: Externally available at www.google.com/trends.

Summing up

Education is changing. Our data shows that growth in demand for online education has outstripped traditional UK Universities for the past three years. As technology change and connectivity continues to proliferate and open doors to education around the world, the traditional education space must ensure that they are able to adapt to and make the most of the opportunities this presents.

International export is another key opportunity for UK higher education - traditional UK universities represent globally respected and recognised brands with strong and growing demand: our data shows that growth in searches for traditional UK universities is driven by international searches, which have grown by an average of 7 ppts per year *more* than domestic searches, for the past 3 years. Again, while there are challenges, those institutions with clear strategies and/or partnerships abroad are potentially set to benefit from an increasingly internationally mobile student population.

Finally, we took a closer a look at MOOCs, which we see as being potentially transformative for education. Key to their ultimate impact on traditional higher education will be credentialisation, but as MOOCs become increasingly prominent, traditional institutions must decide to what extent they adapt and embrace the Massive Open Online Course phenomenon, or risk being left behind.

Google Query Trends - Global/UK trends

2008-2014

On the next pages we show our internal search query trends. They show the change in Google search volumes for buckets of queries (search terms) which we have pre-defined based on the top search terms within each category (Generic Online Education, Traditional UK Universities, MOOCs, MBA Courses, Accountancy Courses, Law Courses, Vocational Courses and Apprenticeships).

Please note that all of the query charts we show have been indexed to 100 at the starting point, unless otherwise stated, and therefore should be used as an indication of growth and not as an indication of absolute search volume. We note also that the queries we have used are predominantly English, and the global data we present may therefore be skewed towards English speaking regions.

Google Education Query Trends - Global searches

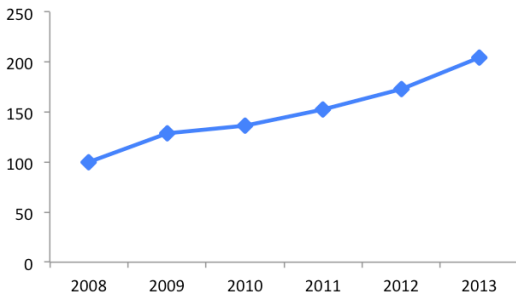
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



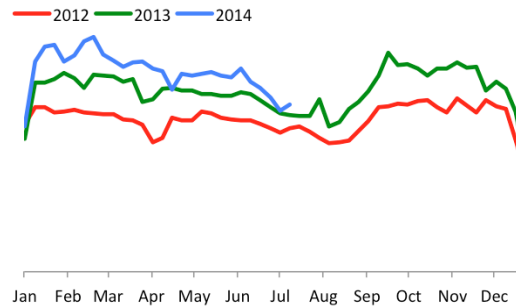
Generic Online Learning

Excludes brand terms, includes queries relating to online courses, online study and distance learning, both paid and free

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



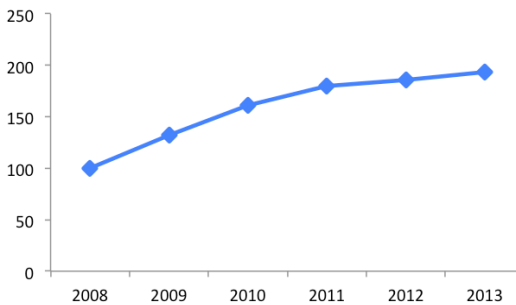
Generic online learning	Queries
2012 yr/yr	14%
2013 yr/yr	18%
2014 yr/yr	11%

	Q2 2013	Q2 2014
Desktop	80%	75%
Mobile	13%	17%
Tablet	7%	8%

Traditional UK Universities

Includes UK Bricks and Mortar university names and variations on each university name

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



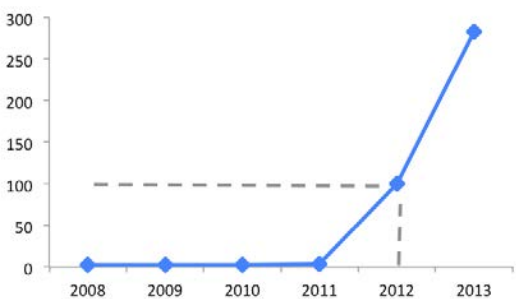
UK Traditional Unis	Queries
2012 yr/yr	3%
2013 yr/yr	4%
2014 yr/yr	-5%

	Q2 2013	Q2 2014
Desktop	77%	72%
Mobile	13%	17%
Tablet	10%	10%

MOOCs

Includes queries relating to "MOOC" and MOOC brands Coursera, Udacity, EdX and FutureLearn

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



MOOCs	Queries
2012 yr/yr	2898%
2013 yr/yr	183%
2014 yr/yr	29%

	Q2 2013	Q2 2014
Desktop	83%	83%
Mobile	8%	10%
Tablet	9%	7%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth. MOOC search volumes are indexed to 100 in 2012 to account for accelerated search growth in 2012/2013.

Google Education Query Trends - Global searches

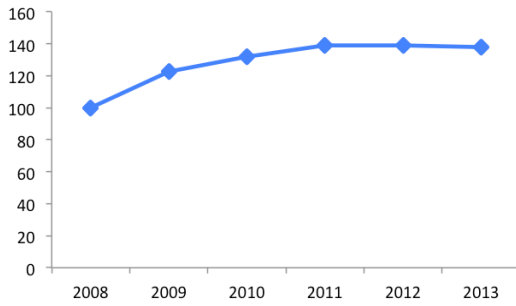
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



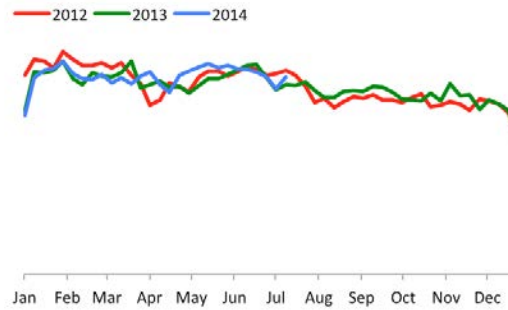
MBA Courses

Excludes brand terms, includes queries relating to MBA courses

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



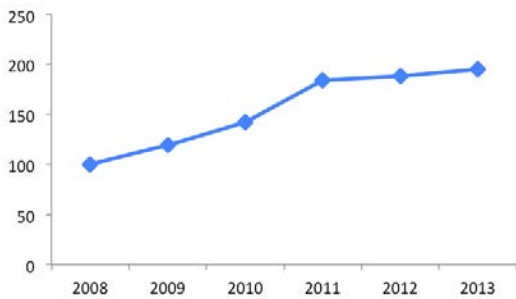
MBA Courses	Queries
2012 yr/yr	0%
2013 yr/yr	-1%
2014 yr/yr	1%

	Q2 2013	Q2 2014
Desktop	76%	67%
Mobile	18%	27%
Tablet	6%	6%

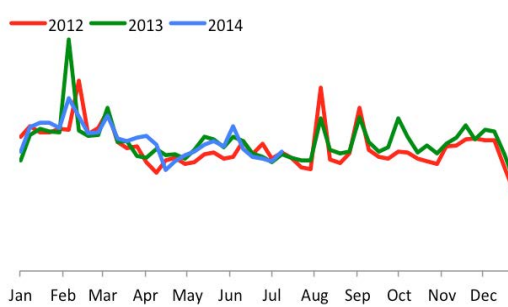
Accountancy Courses

Excludes brand terms, includes terms relating to AAT, ACA, ACCA, CIMA, as well as generic accounting course queries

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



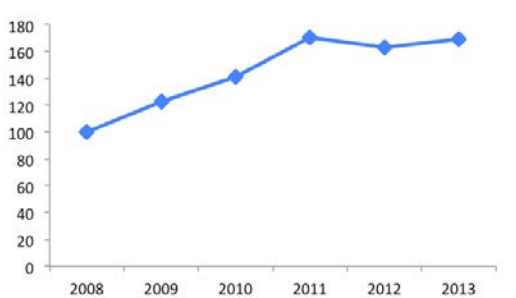
Accountancy Courses	Queries
2012 yr/yr	3%
2013 yr/yr	4%
2014 yr/yr	0%

	Q2 2013	Q2 2014
Desktop	81%	75%
Mobile	13%	18%
Tablet	6%	6%

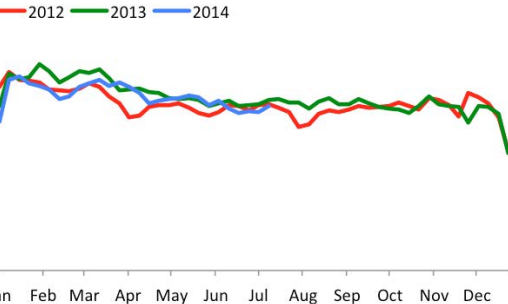
Law Courses

Excludes brand terms, includes terms relating to LLM, LLB, GDL, LPC, Bar, as well as generic law course queries

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



Law Courses	Queries
2012 yr/yr	-4%
2013 yr/yr	4%
2014 yr/yr	-4%

	Q2 2013	Q2 2014
Desktop	72%	66%
Mobile	21%	27%
Tablet	7%	7%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth

Google Education Query Trends - Global searches

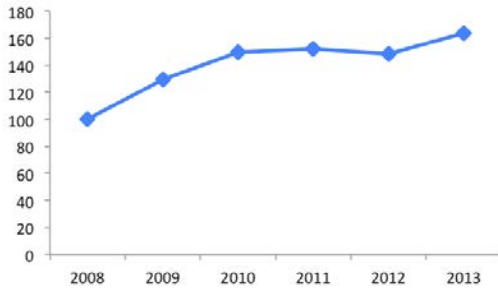
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



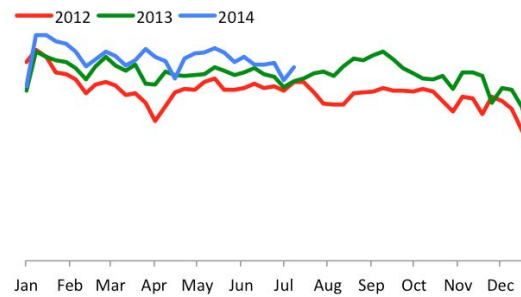
Vocational Courses

Excludes brand terms, includes queries relating to various Vocational courses including photography, health and beauty, design, catering, tourism

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



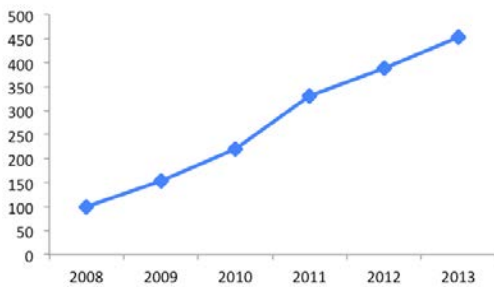
Vocational Courses	Queries
2012 yr/yr	-2%
2013 yr/yr	10%
2014 yr/yr	7%

	Q2 2013	Q2 2014
Desktop	64%	55%
Mobile	24%	34%
Tablet	12%	11%

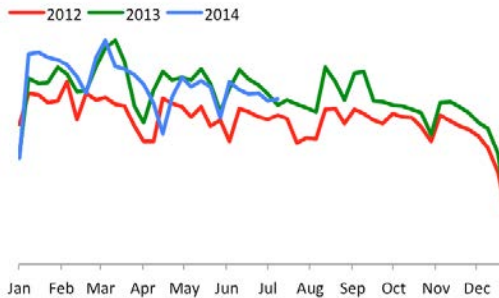
Apprenticeships

Includes searches relating to new apprenticeships, includes brand terms in relation to companies taking on apprentices, but not in relation to educational institutions providing apprenticeships/apprenticeship student/company relationships

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



Apprenticeships	Queries
2012 yr/yr	18%
2013 yr/yr	17%
2014 yr/yr	0%

	Q2 2013	Q2 2014
Desktop	69%	62%
Mobile	20%	27%
Tablet	10%	11%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth

Google Education Query Trends - UK searches

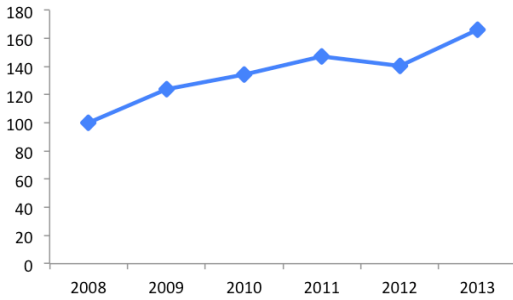
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



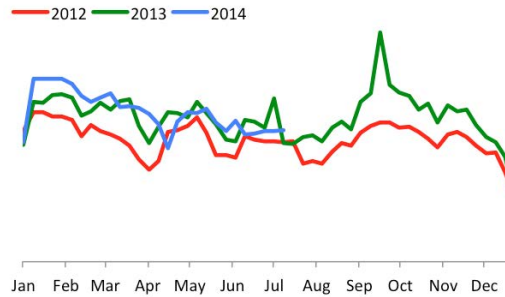
Generic Online Learning

Excludes brand terms, includes queries relating to online courses, online study and distance learning, both paid and free

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



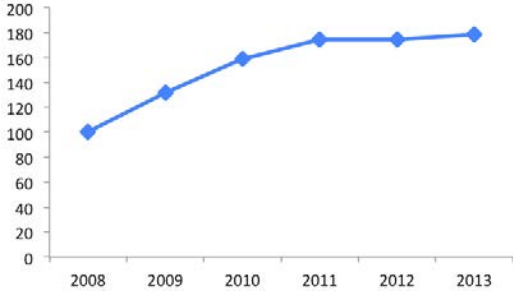
Generic online learning	Queries
2012 yr/yr	-4%
2013 yr/yr	18%
2014 yr/yr	3%

	Q2 2013	Q2 2014
Desktop	71%	65%
Mobile	16%	20%
Tablet	13%	15%

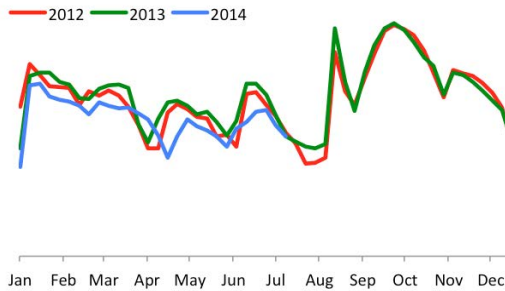
Traditional UK Universities

Includes UK Bricks and Mortar university names and variations on each university name

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



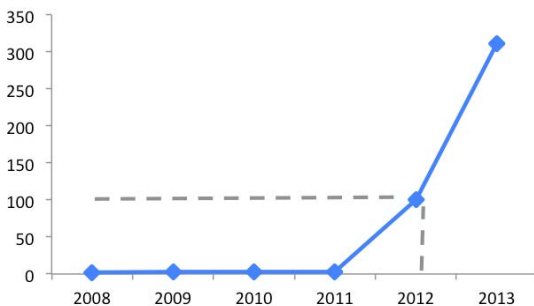
UK Traditional Unis	Queries
2012 yr/yr	0%
2013 yr/yr	2%
2014 yr/yr	-10%

	Q2 2013	Q2 2014
Desktop	74%	70%
Mobile	15%	18%
Tablet	11%	12%

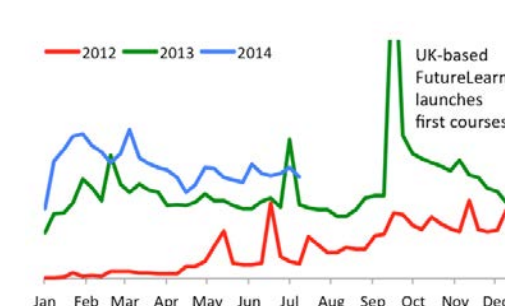
MOOCs

Includes queries relating to "MOOC" and MOOC brands Coursera, Udacity, EdX and FutureLearn

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



MOOCs	Queries
2012 yr/yr	2917%
2013 yr/yr	212%
2014 yr/yr	38%

	Q2 2013	Q2 2014
Desktop	80%	79%
Mobile	9%	10%
Tablet	11%	11%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth. MOOC search volumes are indexed to 100 in 2012 to account for accelerated search growth in 2012/2013.

Google Education Query Trends - UK searches

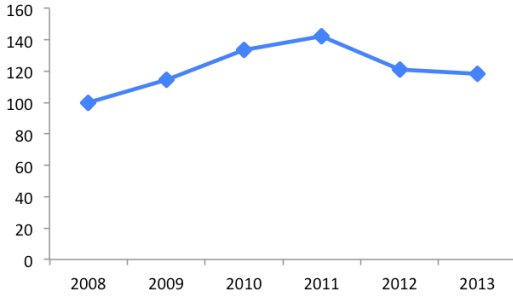
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



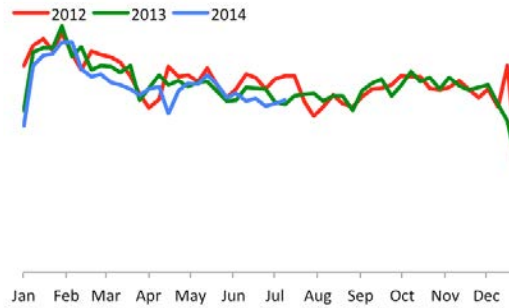
MBA Courses

Excludes brand terms, includes queries relating to MBA courses

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



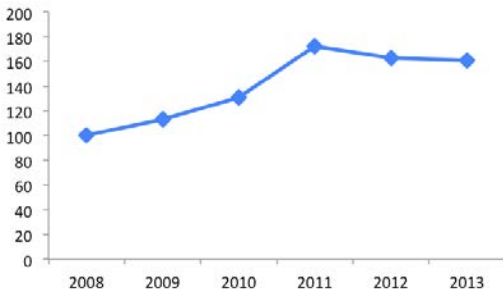
MBA Courses	Queries
2012 yr/yr	-15%
2013 yr/yr	-2%
2014 yr/yr	-3%

	Q2 2013	Q2 2014
Desktop	71%	67%
Mobile	18%	22%
Tablet	11%	11%

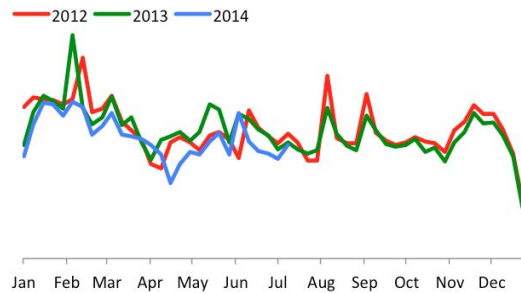
Accountancy Courses

Excludes brand terms, includes terms relating to AAT, ACA, ACCA, CIMA, as well as generic accounting course queries

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



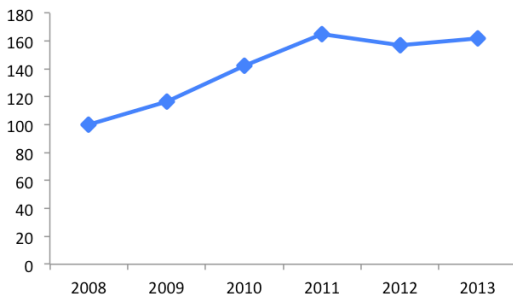
Accountancy Courses	Queries
2012 yr/yr	-5%
2013 yr/yr	-1%
2014 yr/yr	-11%

	Q2 2013	Q2 2014
Desktop	79%	76%
Mobile	14%	16%
Tablet	7%	8%

Law Courses

Excludes brand terms, includes terms relating to LLM, LLB, GDL, LPC, Bar, as well as generic law course queries

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



Law Courses	Queries
2012 yr/yr	-5%
2013 yr/yr	3%
2014 yr/yr	-3%

	Q2 2013	Q2 2014
Desktop	70%	64%
Mobile	20%	25%
Tablet	10%	11%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth

Google Education Query Trends - UK searches

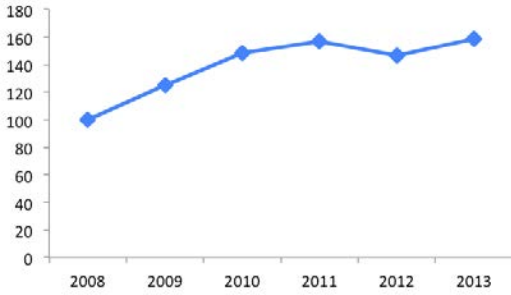
Long run trends indexed to 100 in 2008, weekly data to week ending 12th July 2014



Vocational Courses

Excludes brand terms, includes queries relating to various Vocational courses including photography, health and beauty, design, catering, tourism

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



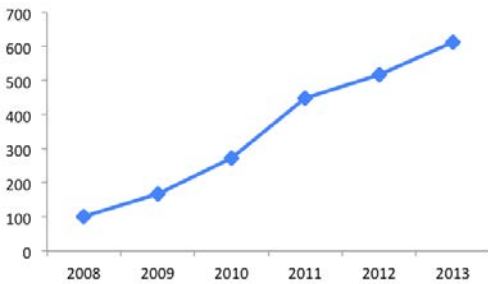
Vocational Courses	Queries
2012 yr/yr	-7%
2013 yr/yr	8%
2014 yr/yr	-3%

	Q2 2013	Q2 2014
Desktop	56%	49%
Mobile	25%	33%
Tablet	18%	18%

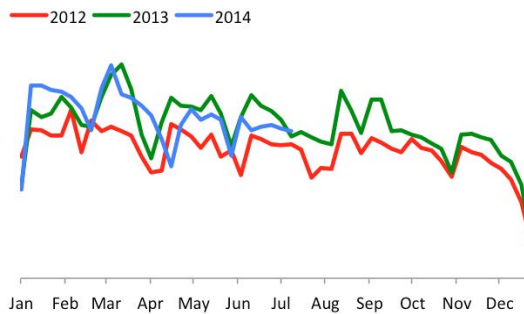
Apprenticeships

Includes searches relating to new apprenticeships, includes brand terms in relation to companies taking on apprentices, but not in relation to educational institutions providing apprenticeships/apprenticeship student/company relationships

Long-run trends 2008 - 2013



Weekly trends yr/yr 2012 - 2014



Apprenticeships	Queries
2012 yr/yr	16%
2013 yr/yr	18%
2014 yr/yr	-1%

	Q2 2013	Q2 2014
Desktop	70%	62%
Mobile	19%	25%
Tablet	11%	13%

Source for all charts: Google Internal Data. Note: 2014 yr/yr data shows 2014 year-to-date yr/yr growth