

# Education Data & Insights

## COVID-19

June 2020

# The Unprecedented Impact of COVID-19

---

As at 14 May, it was estimated that 1.2 billion learners were affected, being 69.3% of total enrolled learners

As at 16 April, a majority of prospective international students stated that the coronavirus had impacted their plans to study abroad

There were only 30 student visa arrivals to Australia in April 2020, representing a 99.94% decline from April 2019

# Global Education Institution Closures

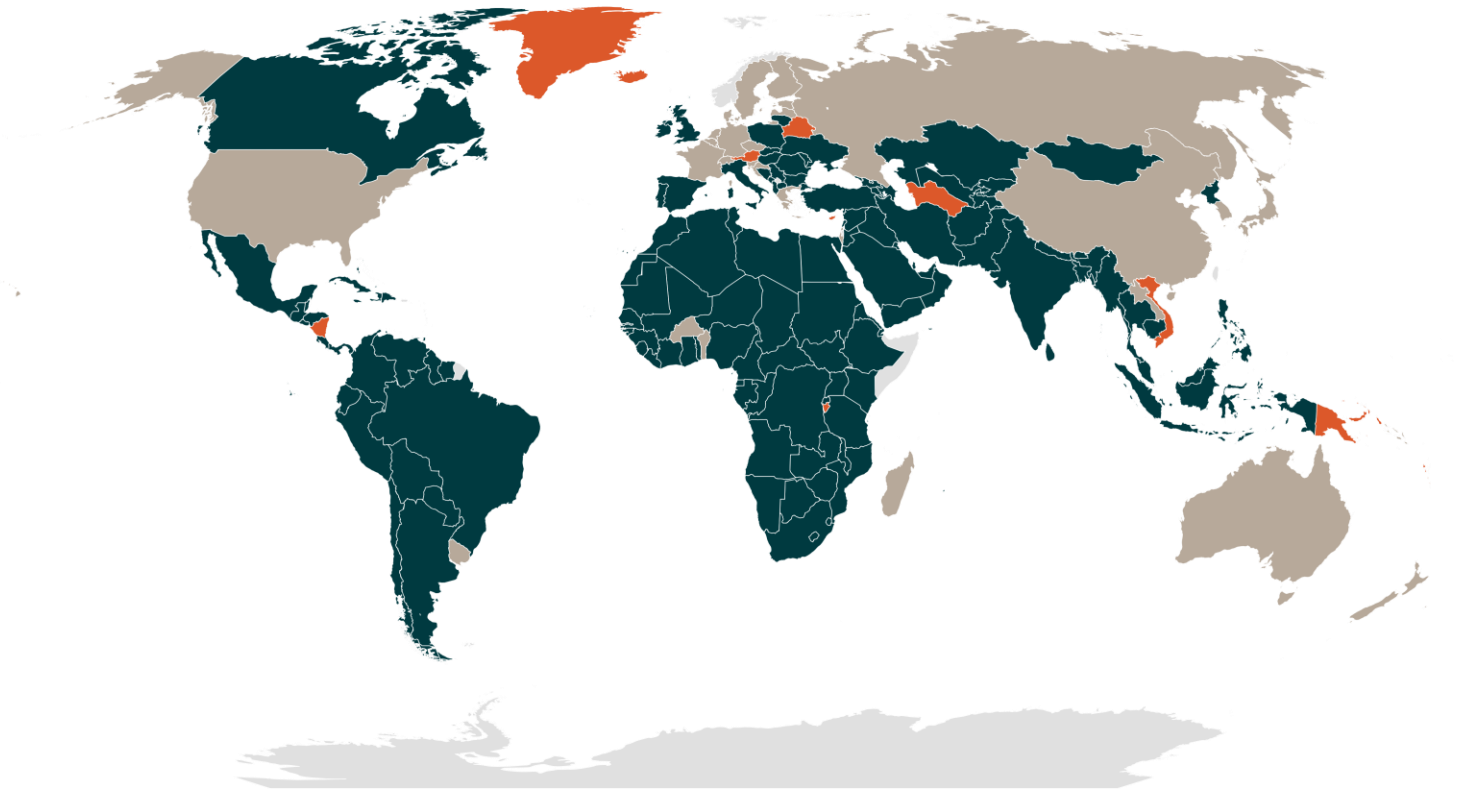
Pre-primary, primary, secondary and tertiary education institution closures caused by COVID-19 as at 14 May

## Insights

- Figures correspond to number of learners enrolled at pre-primary, primary, lower-secondary, and upper-secondary levels of education (ISCED levels 0 to 3), as well as at tertiary education levels (ISCED levels 5 to 8)
- **As at 14 May, it was estimated that 1.2 billion learners were affected being 69.3% of total enrolled learners. This is down from a peak of 1.6 billion affected learners at the end of March**
- At its worst, there were 193 countries with national closures. This has reduced to 160 countries as the pandemic eases in some regions
- With so many students out of school and hundreds of millions attempting to learn solely online, this forced experiment will reshape schools, the idea of education and what learning looks like in the 21st century
- The pandemic is forcing educators, parents, and students to think critically, problem-solve, be creative, communicate, collaborate and be agile

## Source

UNESCO, Quartz

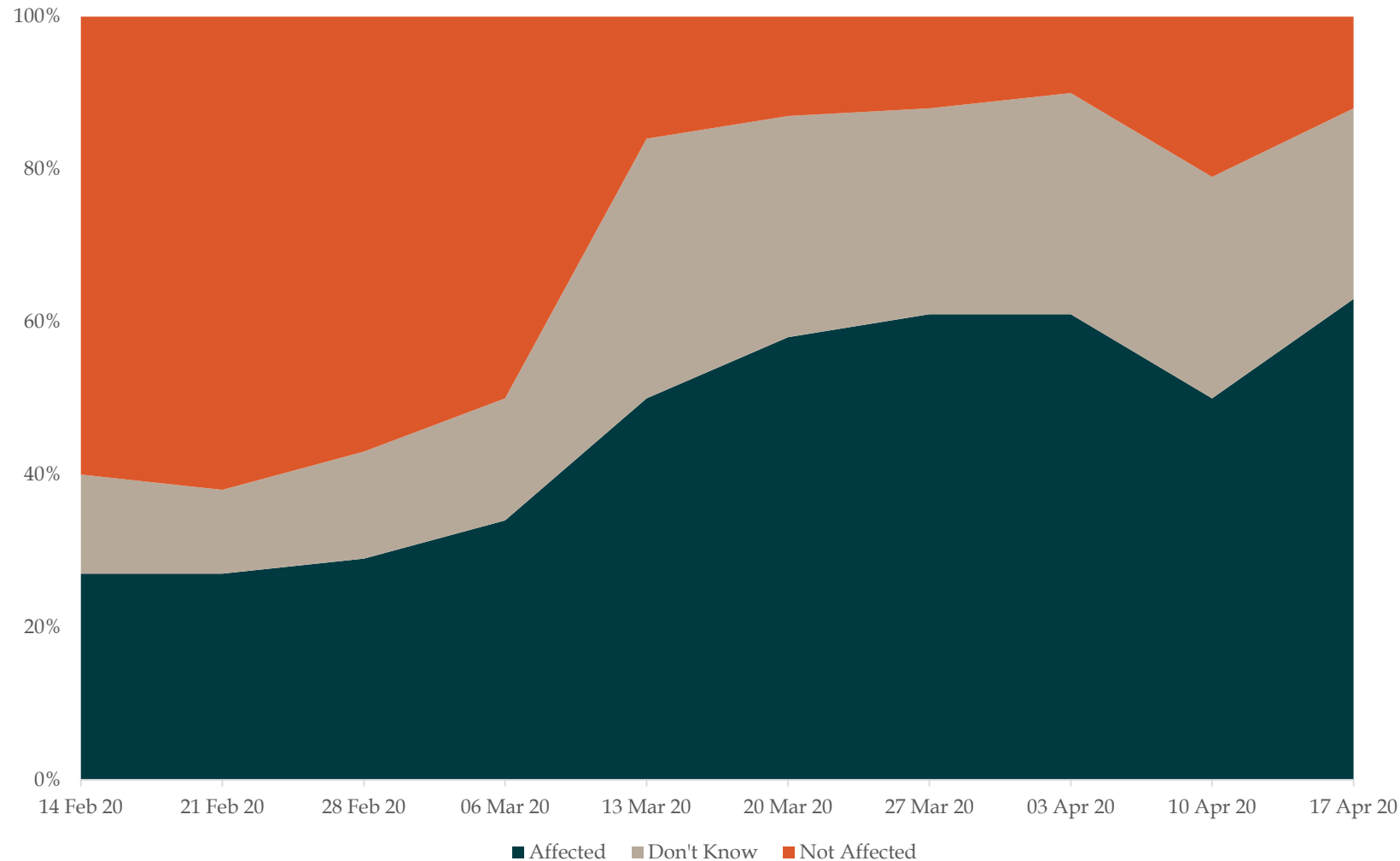


■ National ■ Localised ■ Open

Powered by Bing  
© GeoNames, Microsoft, Navinfo, TomTom, Wikipedia

# Prospective International Student Intent

## Has the coronavirus affected your plans to study abroad?



### Insights

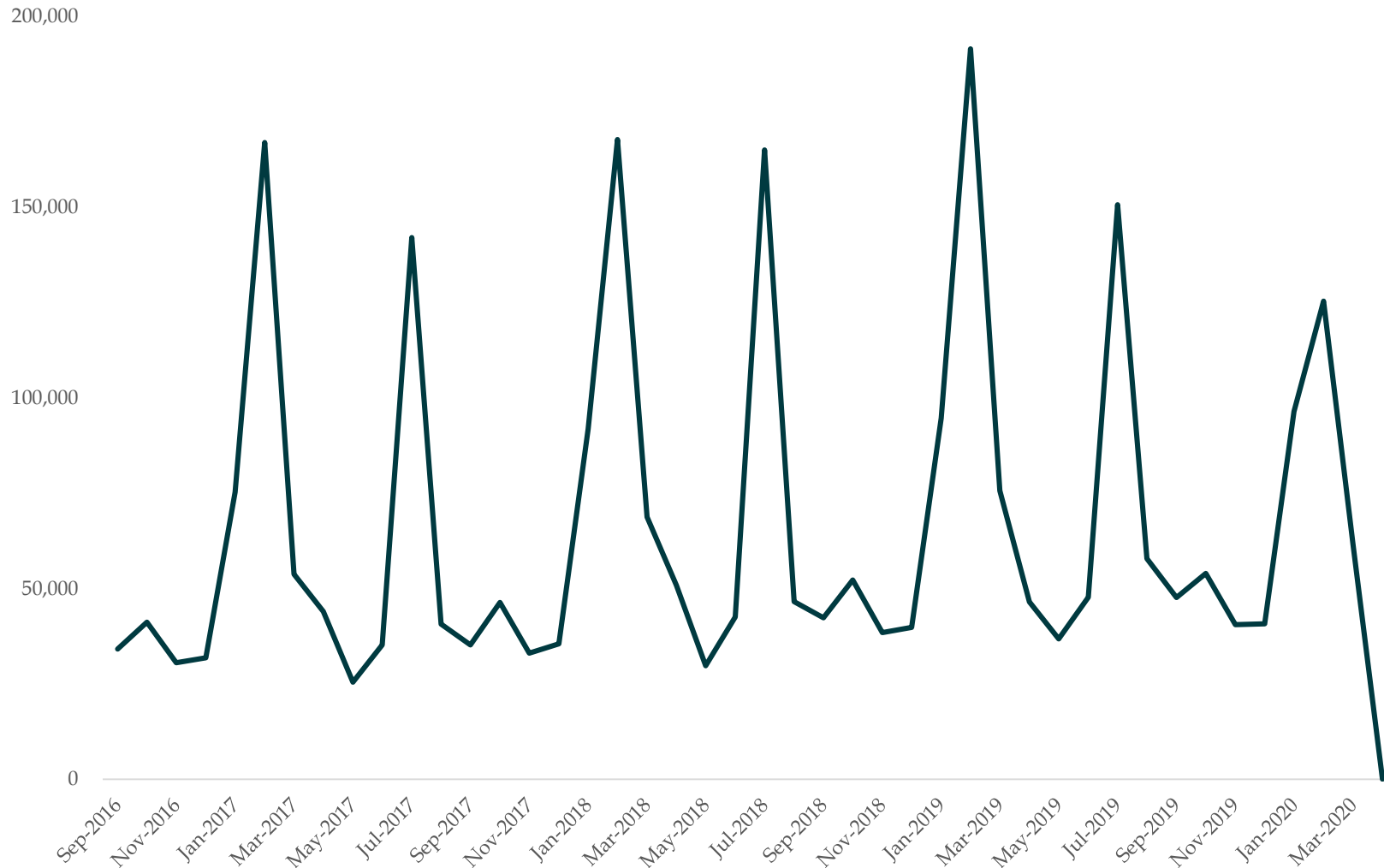
- Student perceptions of the pandemic and its effects are shifting quickly
- This survey is a pulse survey that has been in the field since 14 February. To date, the survey has gathered more than 24,000 responses from prospective international students with results tracked on a week-by-week basis
- **As at 16 April, 53% of respondents stated that the coronavirus had impacted their plans to study abroad, compared to only 27% of respondents in the first analysis of the results on 26 February and 35% on 12 March**
- Of the 53% of respondents whose plans had been impacted by COVID-19, 46% intended to defer or delay their entry until next year

### Source

Quacquarelli Symonds

# Temporary Student Visa Arrivals in Australia

Provisional statistics on the international travel movements of persons arriving in and departing from Australia



## Insights

- Provisional statistics on international travel movements of temporary student visa holders (i.e. international students) arriving in Australia
- Figures represent the number of international border crossings rather than the number of people
- **There were only 30 arrivals in April 2020, representing a 99.94% decline from April 2019 when there were 46,480 arrivals**
- Departures were also down by 78.18% against the prior corresponding period to 9,910 showing that some students may have been stranded and unable to return to their home countries. The intent of these students (i.e. whether they continued studies as onshore students or discontinued study altogether is not clear from this data)
- It is worth noting that arrivals in February and March were also down (34.54% and 18.27%, respectively) possibly showing that earlier impacts of the pandemic in students' home countries was affecting international student travel to Australia

## Source

Australian Bureau of Statistics

# The Response and Long-Term Impact

---





The transition to remote teaching and learning for practically all higher education students across the globe has led to a much greater reliance upon technological solutions







Unfortunately, the vast majority of students have found the online class experience unengaging and they miss spending time with faculty and fellow students

While expectations for the long-term paint a more positive picture, over 50% of education institutions still expect to be worse off as a result of COVID-19

# Interest in Online Learning Platforms

Learning management systems for K-12 and digital learning platforms for corporate learning are seeing a sizeable increase in interest and use

	 Google Classroom	 canvas	 schoolology	 Blackboard
<b>Change in search interest</b> 5 Jan 20 to 5 Apr 20	<b>2.0x</b>	<b>1.5x</b>	<b>1.7x</b>	<b>2.7x</b>
<b>Average weekly web traffic</b> 5 Jan 20 to 5 Apr 20	<b>4.0x</b>	<b>3.0x</b>	<b>2.0x</b>	<b>3.0x</b>

	 Udemy	 coursera	 LEARNING WITH Lynda.COM CONTENT
<b>Change in search interest</b> 5 Jan 20 to 21 Apr 20	<b>+56%</b>	<b>+100%</b>	<b>+84%</b>
	 UDACITY	 PLURALSIGHT	 Linux Academy
	<b>+48%</b>	<b>+91%</b>	<b>+36%</b>

## Insights

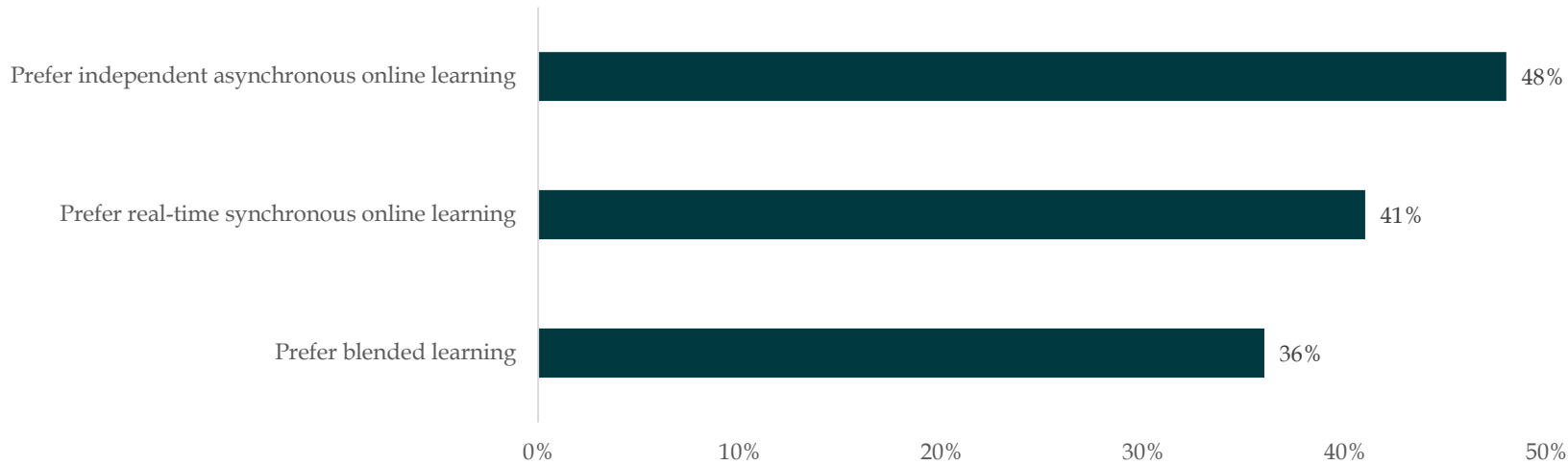
- With the COVID-19 transition to remote teaching and learning for practically all higher education students across the globe, two of the EdTech platforms that are carrying much of the increased load are the learning management system (LMS) and the synchronous video tools (aka virtual classroom)
- Canvas LMS usage has increased more than 60% in terms of maximum concurrent users and the number of video uploads has increased by a factor of 10x
- The number of logins for the Blackboard Learn LMS has increased 4x and the number of daily virtual classroom users has increased 36x
- Synchronous video/virtual classroom usage has increased far more than LMS usage. This shows a preference of teachers to first try to replicate their face-to-face class in a virtual environment. While Zoom does not separate out their education usage numbers, overall they have experienced a 20x increase in usage

## Source

Bain & Company, Phil on EdTech

# Student Experience

Survey of 3,089 North American higher education students



## Insights

- The sudden transition to remote teaching in the past few months due to the COVID-19 crisis pushed educators to piece together solutions to deliver their courses online
- In many cases, the result was a disjointed experience that required educators to navigate various technology tools and platforms to bring their courses to life in a new learning environment. Although no small feat, many students developed a poor impression of the educational value they received
- **The vast majority of students found the online class experience unengaging and they miss spending time with faculty and fellow students**
- Perhaps paradoxically (or not, if you recall your university days), although the majority of students surveyed missed the social aspects of their higher education experience, of the 3 versions of online learning offered, most students preferred an asynchronous model that limited interaction between faculty and fellow students



Miss face-to-face interaction with faculty



No longer have regular access to faculty



Miss socialising with other students



No longer have regular access to classmates



Are feeling anxious



Are concerned about finishing the semester



Say the online class experience is unengaging



Are spending less time on coursework

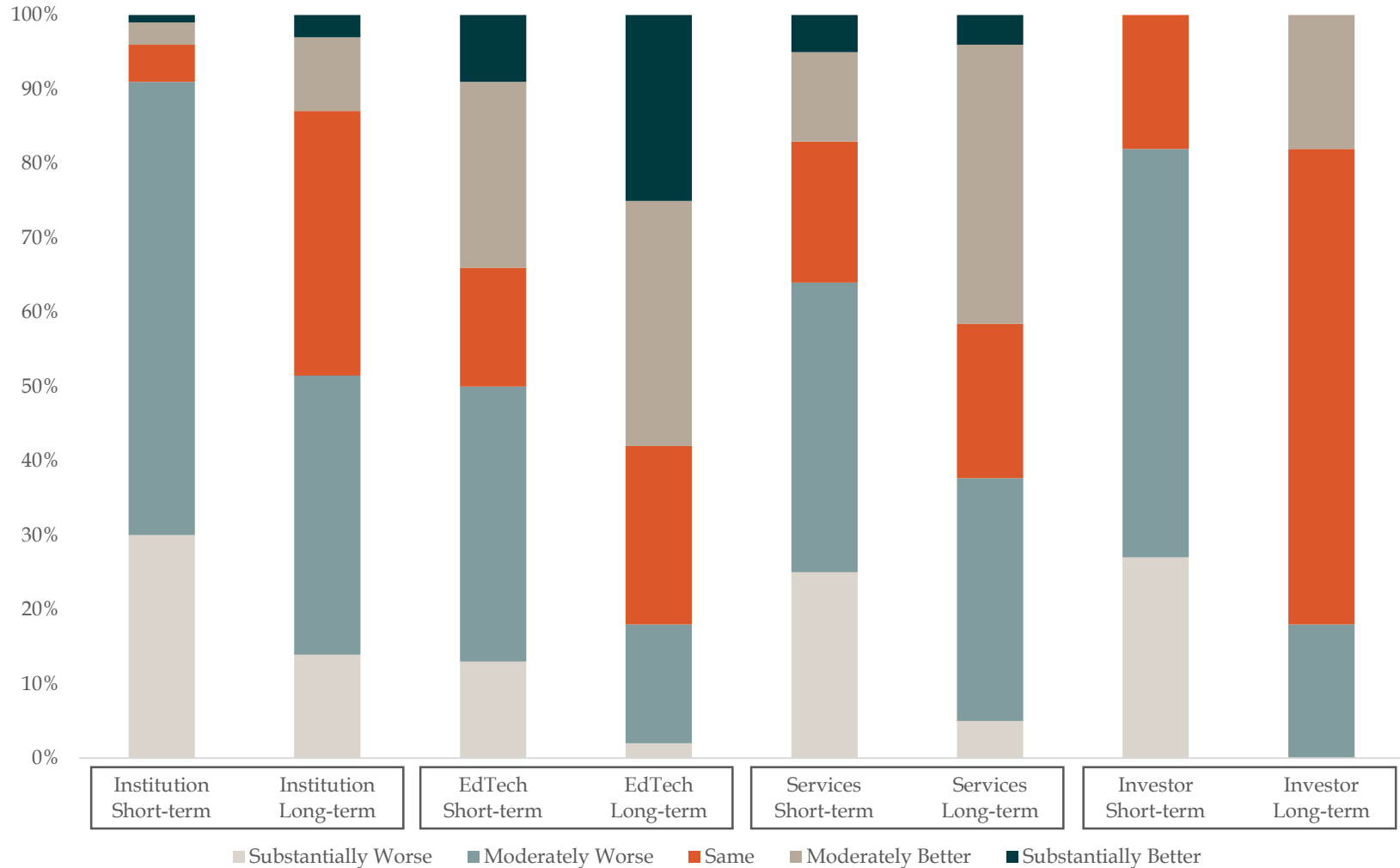
Source

Top Hat



# Education Sector Impact

## Short-term and long-term impact of COVID-19 by organisation type



### Insights

- Education organisations of all types are expecting to be worse off in the short-term as a result of COVID-19. Education institutions are expecting to be the hardest hit with 91% of respondents indicating they will be moderately (61%) or substantially (30%) worse off in the short-term
- On the other hand, only 50% of EdTech organisations are expecting to be worse off in the short-term, with one third expecting to be better off due to COVID-19, presumably expecting their tech services to be more in demand as institutions and corporates pivot to online delivery
- While expectations for the long-term paint a more positive picture, over 50% of education institutions still expect to be worse off as a result of COVID-19. Concerns around the future of traditional international education models and also optimism that “the time for online learning has come” are evident in sentiment of respondents**
- Most investors in the sector see no change for their business in the long-term, but have a unique pessimism over conditions in the immediate future

### Source

Holon IQ

## Contact

**Michael Hui**

Director, Head of Private Enterprise Investments

Tel: +61 7 3182 3200

Email: [michaelh@arowanaco.com](mailto:michaelh@arowanaco.com)

