

June 2021

The U.S. Education Services Industry

An Organic Search
Research Report



BRIGHTEDGE
RESEARCH



Introduction

The U.S. education industry enjoyed modest growth over the past 5 years at an average rate of 0.8% per year*. In 2021, the rate of growth is forecasted to accelerate to 5.2%* and maintain a similar growth rate of 4.7% compound annual growth (CAGR) into 2025**.

Organic search provides practical insight into the interests and intent of real consumers. To better understand growth in the education space and the dynamics of consumer interest in education services, we conducted an analysis of organic search trends.

We began by looking at search volume trends for approximately 150,000 keywords related to the education industry. We analyzed the broad set of terms to determine the makeup of search result types (regular web listing, people also ask, local 3-pack, etc.), which domains are earning the lion's share of ranked search results and clicks, and then we dug in to assess the nature of the searches. The analysis offers insight into the areas of opportunity, broadly across the education industry.

Here's what we found.

* "Educational Services in the US - Market Size 2005–2027." *IbisWorld*. May 26, 2021.

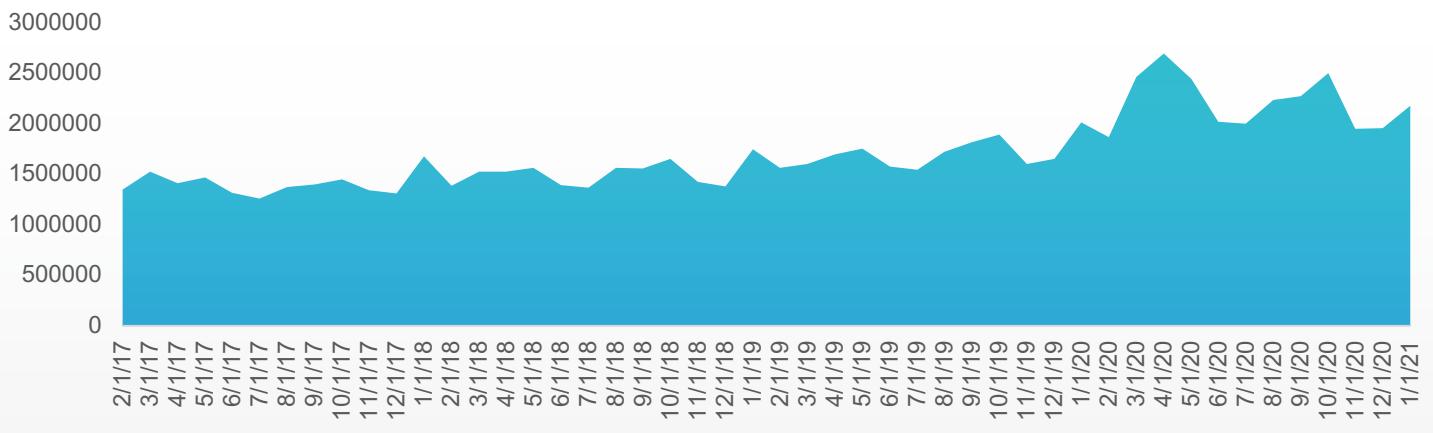
** "U.S. Education Market Size & Share Predicted to be Worth USD 1,949.99 Billion By 2025: Facts & Factors." *Facts & Factors*. January 6, 2021.

Market Overview

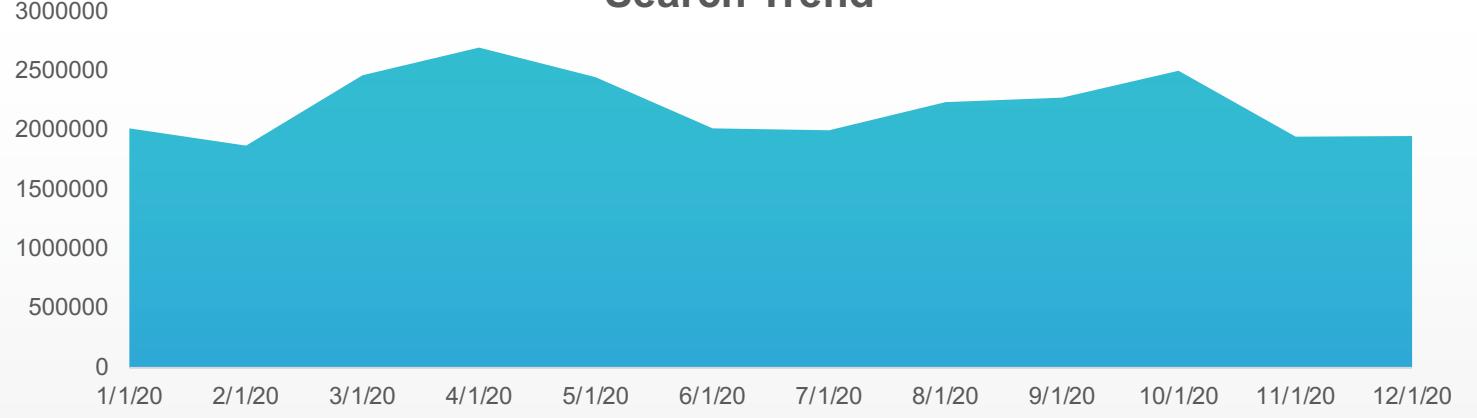
At an industry level, growth in search around education services shows an upward trend that parallels the previously cited industry growth history and forecasts.

From early 2017 through January of 2021, we see overall growth with a significant spike of roughly 60% year-over-year at the start of the pandemic in 2020, which was mostly maintained into the start of 2021. Throughout the 4-year period we see fairly repetitive peaks and valleys in interest that loosely correlate with traditional application and enrollment periods.

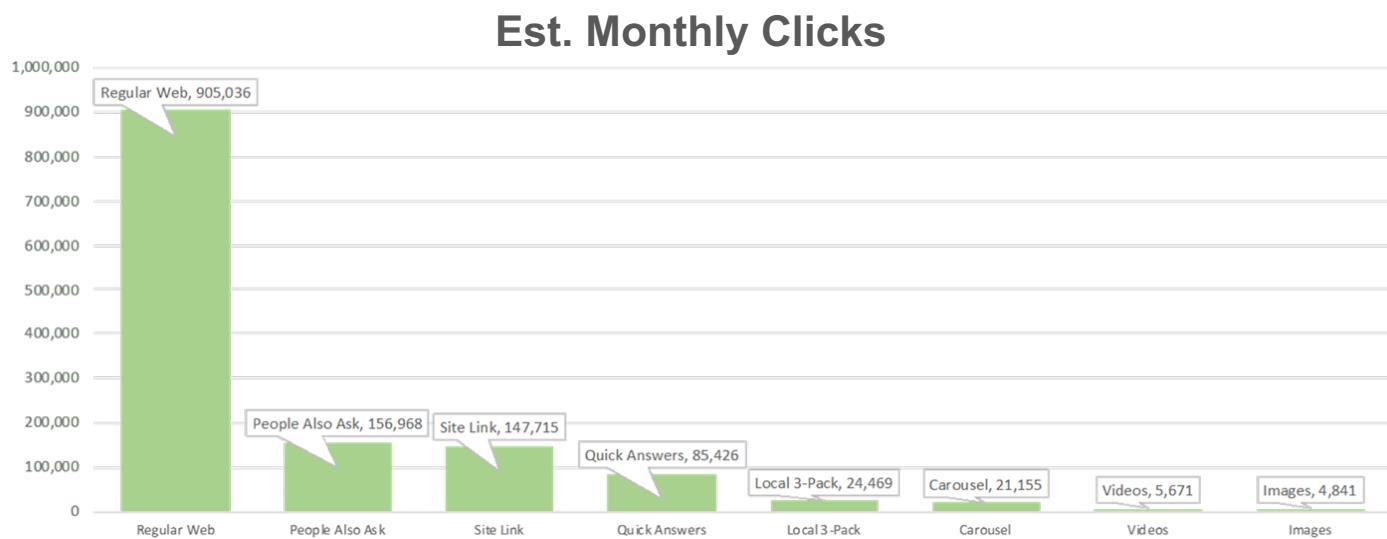
Search Trend



Search Trend



Looking at click volumes by search result types give us our first bit of insight into searcher intent. As evidenced by the chart below, education services-related searches led to clicks predominantly on regular web listings. The emphasis on regular web listings suggests a research-oriented intent.



It is also important to note that, in general, with regular web listings, it's essential to rank high for a given search because click volumes fall off dramatically for lower ranked search results. According to one study, "On the first page alone, the first five organic results account for 67.60% of all the clicks and the results from 6 to 10 account for only 3.73%." *

* "Part 1: Organic vs PPC in 2021: The CTR Results." *Zero Limit Web Digital Marketing*. February 7, 2021.

Examining Search Intent

Some contextual analysis helps us better determine how the searches are distributed across categories of interest. For this study, we classified the searches into the following three groups, then identified preferences within the groups:

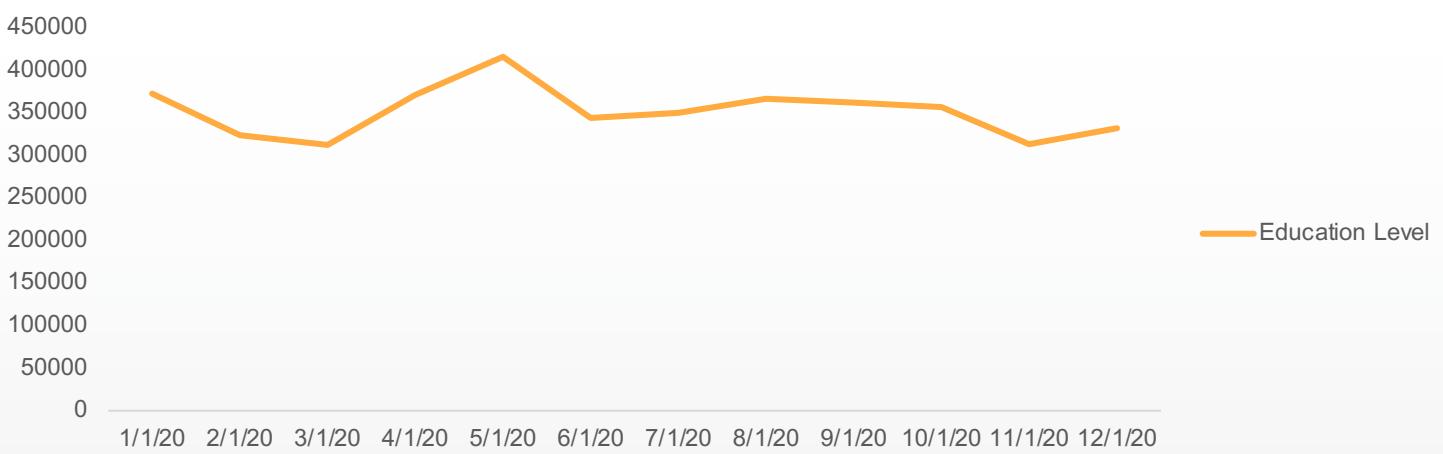
- **Degree / Certification Preference**
- **Subject Preference**
- **Format Preference**

Degree / Certification Preference

Over the past 4 years, searches related to certificates and degrees have gone up overall, with interest in certificate courses up 86%, interest in bachelor's degree programs up 25% and interest in master's degree programs up 50%. Not surprisingly, search trends indicate seasonality aligned with application / admissions periods with surges in search demand between February and May, then again between August and October.

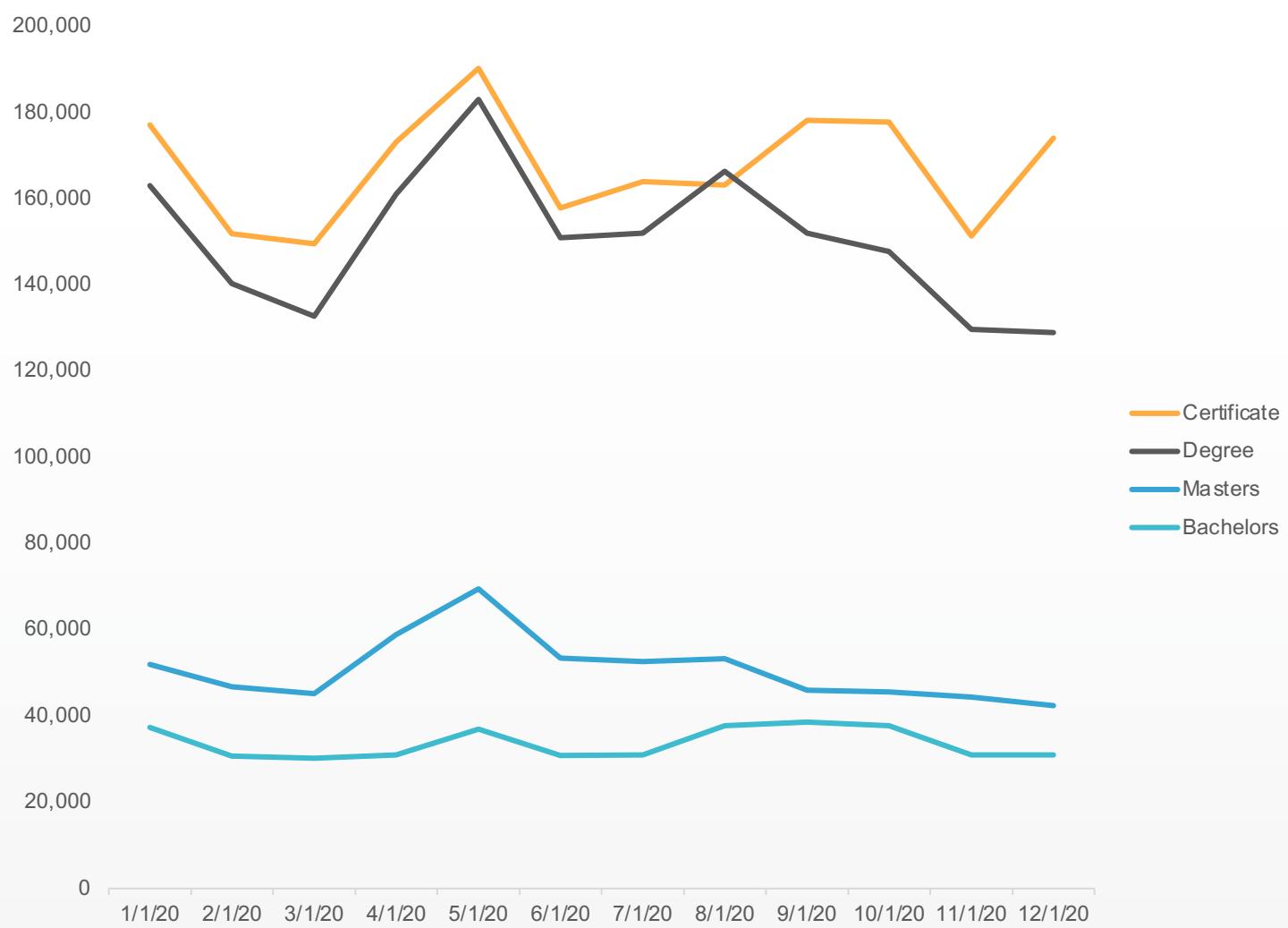
In 2020, within the universe of education-related searches, roughly 15-20% of the volume relates primarily to type of degree / certificate searches.

Education Level

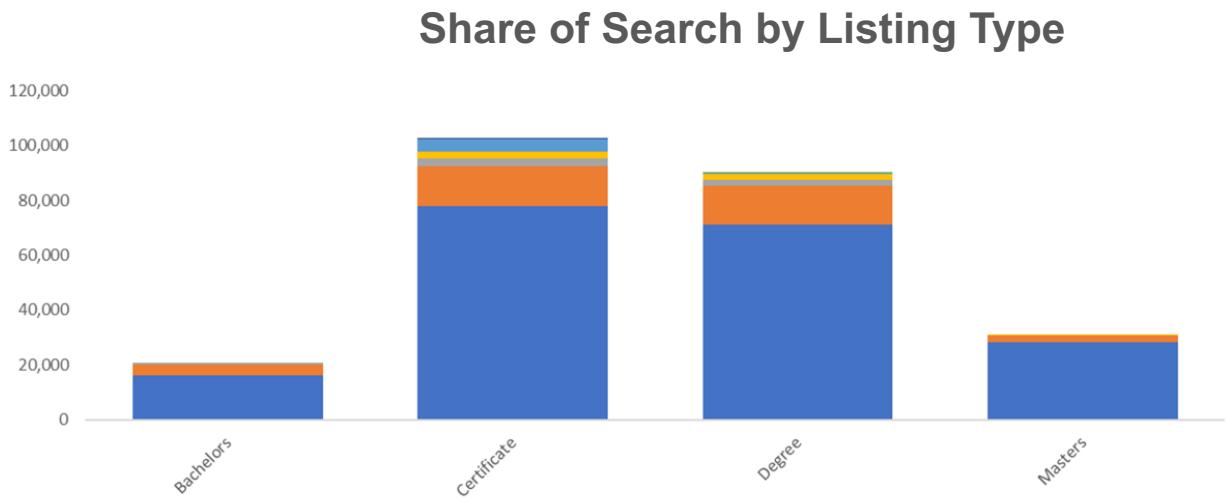


Then, within those searches, we see a recent shift toward greater interest in certificate courses. In the graph below, through much of 2020, searchers showed fairly parallel trends in search volume for degree and certificate programs with certificate programs having a slight, but consistent edge in volume. However, beginning in August 2020, the gap grew measurably larger with certificate program interest rising, dipping, then rising again, while interest in degree programs steadily declined.

Among searchers exploring degree programs, throughout 2020, interest in master's degrees held an edge over bachelor's degree programs. Of note, a brief spike in searches for master's degree information beginning in March 2020 and ascending into May, correlates with the start of the pandemic. With uncertainty over what impacts the pandemic would have on employment prospects, it's feasible that the spike in searches correlates with searchers preparing for alternate paths.



Finally, among people searching for degree- or certificate-related information, regular web listings continue to dominate the clicks originated by those searches. Looking a bit closer, we see that among certificate category searches, especially, there is a wider mix of search result click types. This kind of nuance is helpful here to understand what types of content to create and optimize to capture prospect interest.

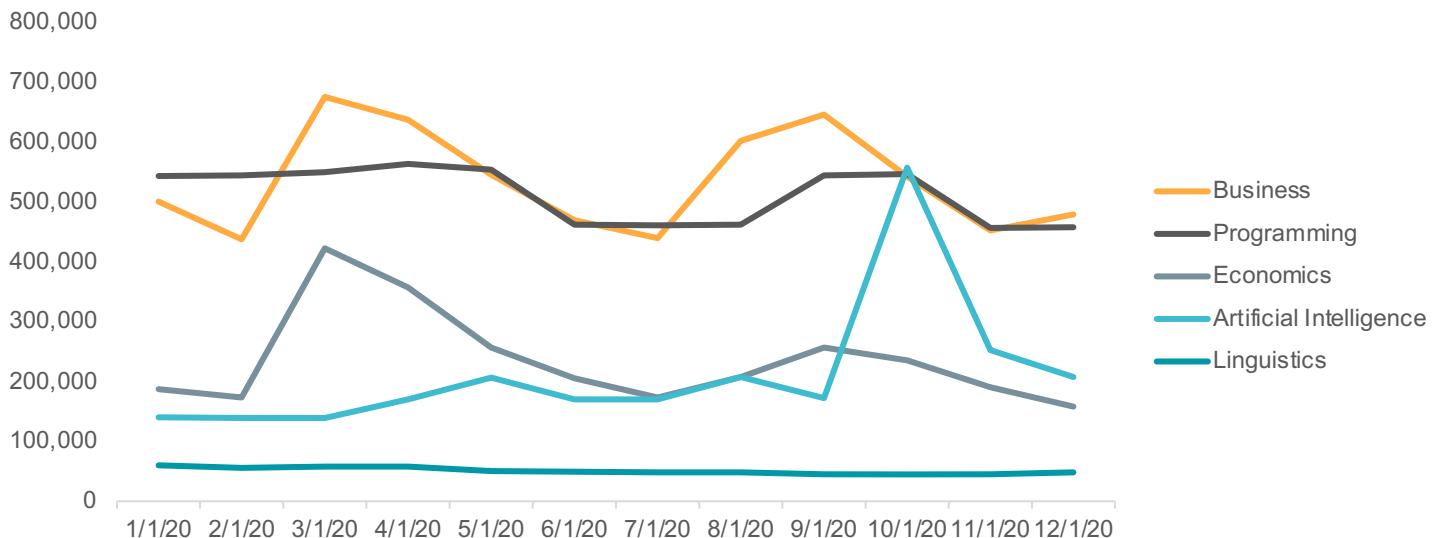


Subject Preference

Searches for specific educational subjects made up roughly 28% of the searches analyzed. Among the most searched subjects, “business course” received the most searches overall and has seen a 97% increase in search volume over the past 4 years. The topic sees peaks between February and May and between July and September.

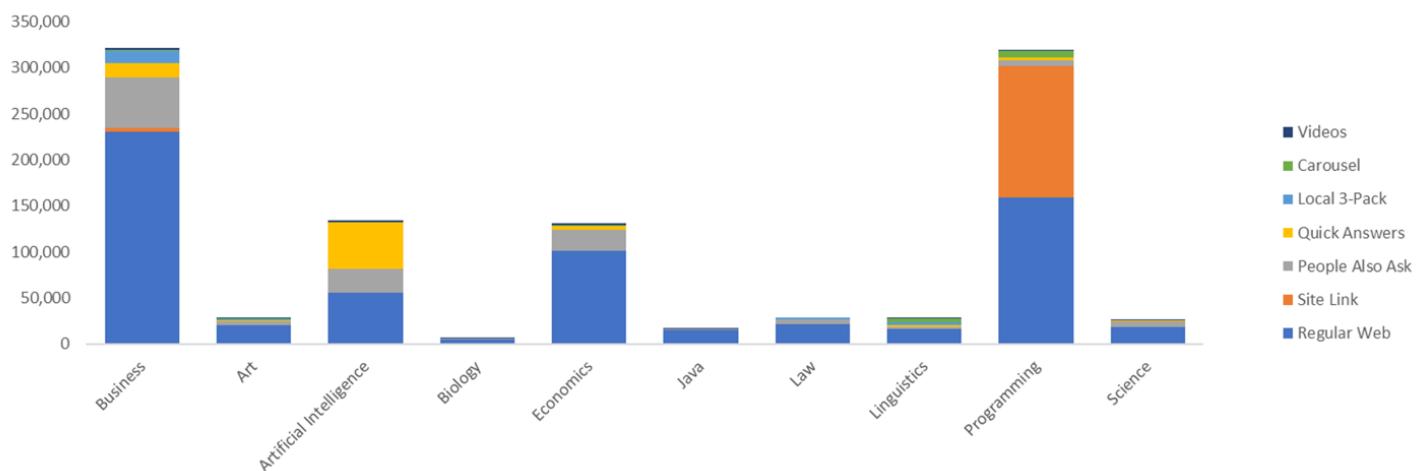
“Programming” as a topic comes in as a runner-up to “business course.” It has seen a more gradual growth rate in interest of 29% over the past 4 years. The topic sees extended peaks between January and June and again between August and October.

Rounding out the top three topics is “AI,” which has enjoyed steady search volume growth of 87% since 2017. “AI” saw a significant spike in interest between August and November of 2020.



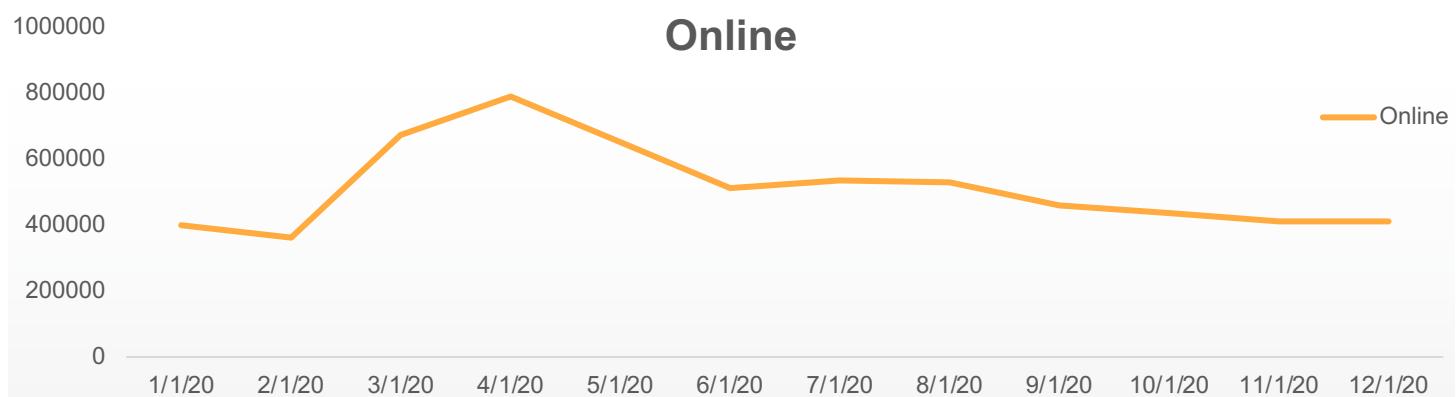
A further look at the top subjects search share by listing type, lends some insight into the nature of the inquiries. For example, a nearly equally heavy mix of regular web listings and site links for the subject, “programming,” suggests that searches are more targeted, with site links offering the type of direct categorical content that searchers are seeking. Similarly, a large portion of searches for artificial intelligence are satisfied with a *quick answers* result. This may indicate a divide in the intent of searches on the subject between people learning at some depth about the topic and people looking to satisfy some narrow curiosity.

Share of Search by Listing Type

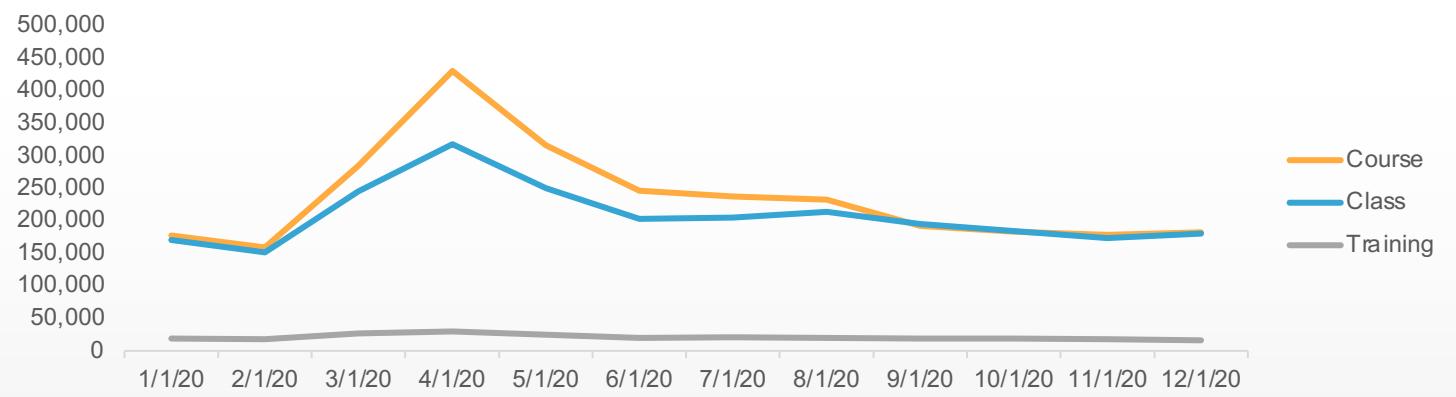


Format Preference

Broadly speaking, there has been a rise in interest in online education. Search volume for “online classes” surged 52% year-over-year in 2020, while interest in “online courses” has seen growth of 82% over the four-year period ending in 2020. Collectively, the category also saw a spike at the beginning of the pandemic that tapered off, but still maintained a slightly higher level than prior to the pandemic start.



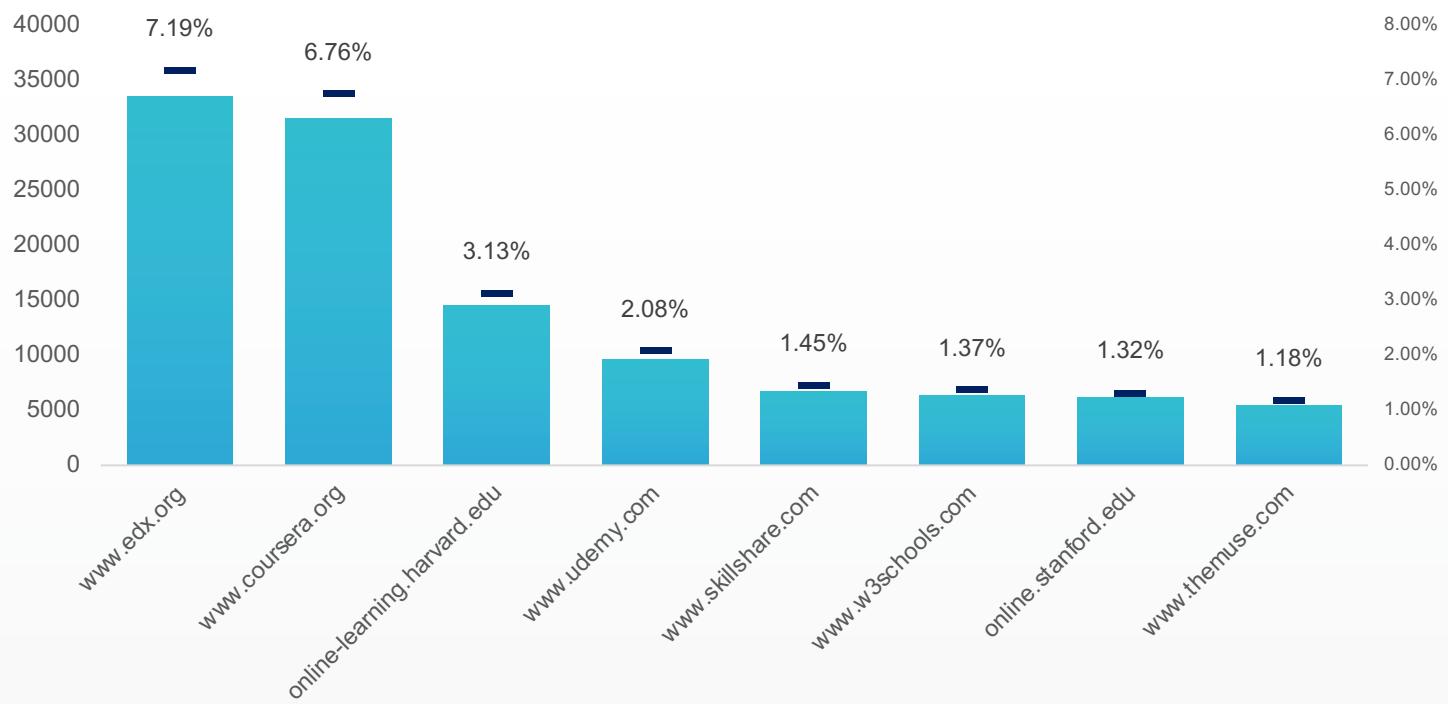
Relatedly, we looked at the search volumes for the format of the education itself. Searches using the term “course” saw nearly equal search volumes compared with searches using the term “class” in 2020 with “course” getting a bigger bump from February to June. “Training” as a search term generally receives a lower volume of searches comparatively, but still a significant number of searches overall. The analysis found that searches using “course” tended to target more technical subjects, while the term “class(es)” targeted artistic and linguistic subjects. “Training” searches were aimed at behavioral subjects.



Top Domains

A look at the top domains for education-related search reveals, to an extent, the opportunity for organizations and brands to capture search share. When examining the list of top domains, it is important to understand that while a particular domain on the list may not represent direct competition for an organization, it does represent competition for searches that are relevant to an organization's offering.

Top Domains
Estimated Monthly Clicks | Share of Search %

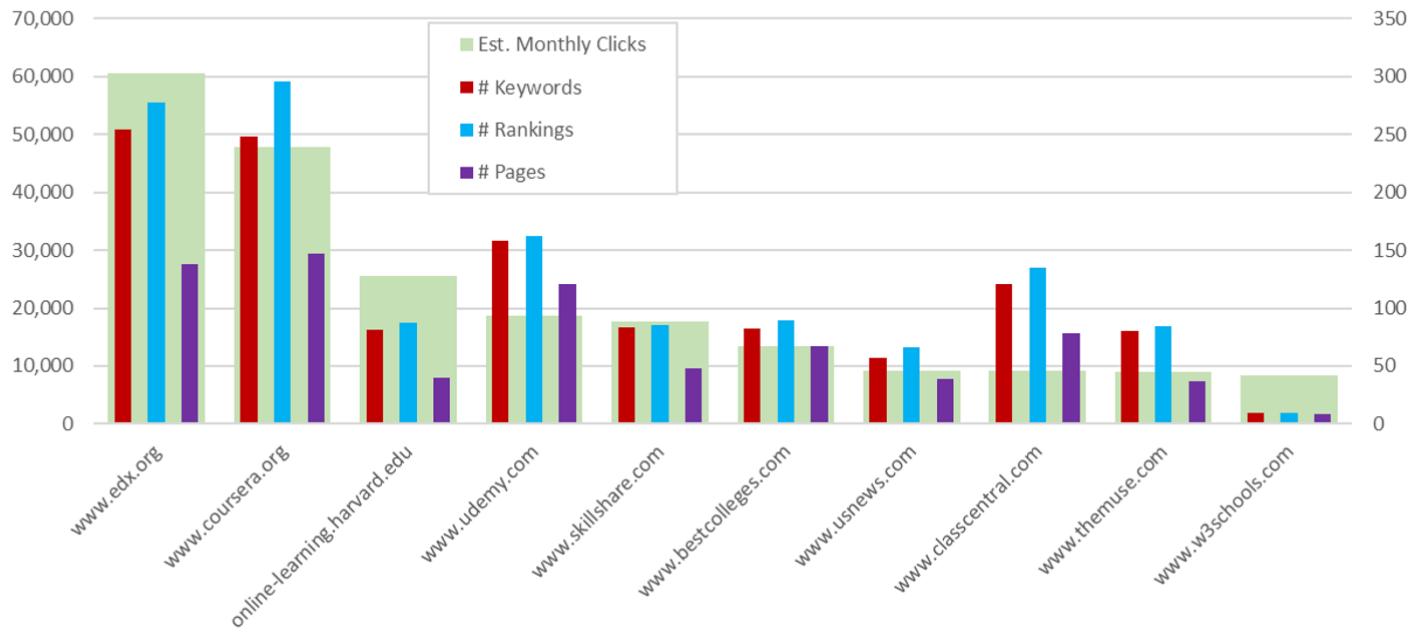


The monthly click volumes show that the top nearly 10% of all relevant click volume goes to two domains, both of which are sites for massive online open course (MOOC) providers. In fact, among the top 10 domains, 17% of the click share goes to MOOCs.

Click volume provides macro perspective on the broad interests of the searcher population. By layering the click volumes with additional measures we can see the breadth and depth of the opportunity a bit better.

Top Domains

Est. Monthly Clicks | # Keywords | # Rankings | # Pages



Here, we've charted the volumes of keywords, rankings and pages for each domain. This gives better perspective on how the domain is getting clicks, such as how broad or narrow the audience is or how entrenched the site is. For example, www.classcentral.com is earning a comparatively smaller number of clicks from a fairly large set of keywords and ranked pages across roughly 80 pages on its site. It is possible the site's content is specialized where the audience for any piece of content is small. By contrast, www.w3schools.com is earning nearly as much click traffic on a substantially smaller set of keywords, rankings and pages. In this case, a narrow set of topics likely has broad appeal and can capture a larger audience.

Either way, this type of analysis for your own domain and your closest competitors' domains can provide valuable perspective on your overall opportunity in the market.

Key Takeaways

The aim of this analysis is to offer a macro perspective on the education market as informed by organic search. Overall, the market is growing and should continue to grow for some time. There are dominant trends such as interest in business courses and traffic going to MOOCs, but the interest areas are broad with a fair amount of parity from topic to topic or category to category.

Perhaps the most important takeaway is that organic search can tell us more than just what content to create and optimize. It can point to larger trends, opportunities and threats we can use to inform marketing and operational strategy.

The type of analysis used here becomes vastly more informative when it is focused in a highly contextualized way on your specific business. If you would like to better understand how you can use the BrightEdge platform to research and analyze consumer behavior trends specific to your market and audiences, contact your Customer Success Manager (CSM) or click the link below to schedule a hands-on training session.

REQUEST A DEMO

Methodology

This Research Guide was prepared using data collected, processed and analyzed using the methodology described below.

Data Collection

- **Keywords were collected from the BrightEdge Data Cube based on relevance to the Education market**
- **Data includes Avg Monthly Demand (last 12 months) and 48 months of search volume trend data (source – Google Keyword Planner)**

Categorization

All keywords in the landscape were categorized using the BrightEdge Market Insights system to process segmentation rules for the following

- **Growth Type (based on Search Volume Trend)**
- **Subject Area**
- **Degree/Certification Type**

Additionally Search Ranking data was categorized for the following

- **Domain Type**
- **Listing Type**

Visualization

The BrightEdge Market Insights platform provided the visualizations of the data based on the categorized landscape.