



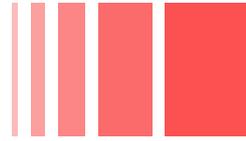
EMERITUS

GLOBAL ONLINE LEARNING SENTIMENT SURVEY

LEARNINGS ABOUT THE FUTURE OF ONLINE
EDUCATION IN A POST COVID-19 WORLD

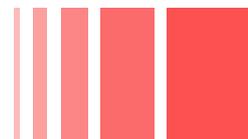


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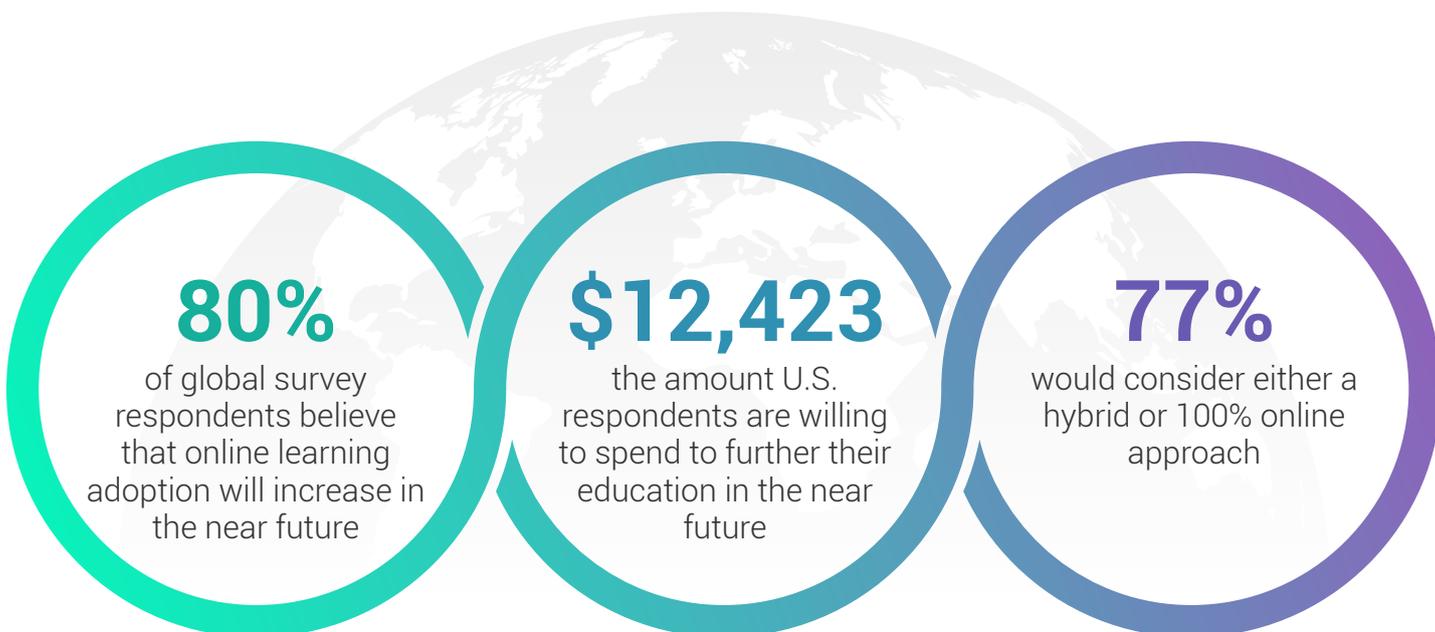


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Overview



HOW DO PEOPLE ACROSS THE GLOBE FEEL ABOUT ONLINE EDUCATION IN LIGHT OF CURRENT GLOBAL DEVELOPMENTS?

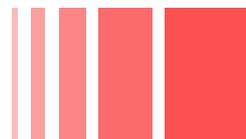


During pre-Covid days, there was already momentum around a shift towards more educational opportunities being offered 100% online or through a hybrid approach. The epidemic has expedited a massive shift to online learning out of necessity. Our research shows that the majority of professionals – 80% – ranging from age 21-65 years old across the globe believe that online learning adoption will increase in the near term, and 77% would consider either a hybrid or 100% online approach to furthering their education. It appears that online education is here to stay and poised to make a massive impact through providing greater access and affordability.

WHAT'S THE MAIN MOTIVATION?



Survey Methodology



Global Online Learning Sentiment | May 2020

Data Collection, Target Audience, and Sample

DATA COLLECTION METHOD

Online questionnaire on Qualtrics®

DATA COLLECTION PERIOD

April 22-May 4, 2020

INSTRUMENT

Computer Assisted Self-Interviewing (CASI) - 7-minute survey

TARGET AUDIENCE

- Living in one of the regions of interest (detailed in table)
- Age between 21 and 65 years old
- Complete High School (20%) + complete Higher Education (80%)
- Interested in pursuing further education in the next 12 months
- Survey respondents are identified based on Emeritus' collaboration with Qualtrics' market research panel

SAMPLING METHOD

- Stratified Random Sampling
- Online panel managed by Qualtrics®

Distribution of Survey Respondents

COUNTRY/REGION	Sample	Weight ¹
US	312	11.1%
UK	156	11.1%
LATAM ²	156	11.1%
India	156	11.1%
Singapore	156	11.1%
Germany	156	11.1%
France	156	11.1%
China	156	11.1%
UAE	156	11.1%
TOTAL	1,560	-

¹ Weight was applied so that all countries have the same representation.

² LATAM sample includes respondents from Argentina, Chile, Colombia, Mexico, and Peru, evenly distributed.

WHY WAS THIS RESEARCH CONDUCTED?

Emeritus and its partner universities wanted to know how the motivations of adult learners for advancing their education (in all its various forms) are being affected by recent global events, namely the Covid-19 pandemic.

Since this is a global pandemic, we sought a truly global perspective and therefore surveyed respondents from 13 different countries who, as a baseline, are interested in pursuing some type of further education in the next 12 months.

Survey Findings – Executive Summary

Prior to the Covid-19 epidemic, there was a shift towards more online education opportunities already in progress, especially for adult learners. The technological infrastructure was in place, with learning platforms like Canvas, Blackboard, and Google Classroom facilitating a modern generation of online learning. But the epidemic expedited a massive shift to online learning out of necessity, pushing it to a whole new scale – and a new level of acceptance among adult learners and employers alike.

Our research shows that the majority of professionals – 80% – ranging from age 21-65 across the globe believe that online learning adoption will increase in the near term, and **77% would consider either a hybrid or 100% online approach** to furthering their education.

Given the mind-blowing pace of technological change, individuals and organizations cannot afford to be complacent and lean on what they have done in the past if they wish to prosper in the future. To that end, we must never stop learning. Now, more than ever, individuals and organizations need to develop the mindset, the skills, and the discipline to thrive in a constantly changing environment. Online education – in all its incarnations, from MOOCs to bootcamps to short courses to degree programs – offers the biggest opportunity to truly democratize education, making high-quality education more accessible and more affordable to those in all corners of the globe.

This forced transition is leading many people to understand the value of online learning, and many respondents say they may not want to go back to the traditional way. It will lead a lot of us to use technology in a way that only early adopters were using.



We believe these events will compel even the top universities to think carefully about their online strategy, expanding beyond just non-credit MOOCs, to perhaps their credit-bearing certificates and some degree programs.

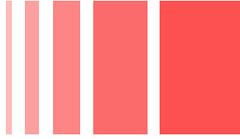


The current crisis is accelerating this thought process and moving them to be more serious about going online. Not only is this a critical business continuity measure, but as schools struggle to maintain international student enrollment in residence, online options offer an alternative way to reach students who may be increasingly unwilling – or unable – to relocate to access top-quality education.

— **Shaun Dubash**

Director of Online Certificate Programs at Emeritus

Executive Summary



1,560
RESPONDENTS

are interested in **pursuing further education** in the next 12 months

within...

3 Months
45%

6 Months
32%

12 Months
23%

76% of those who consider a free option also consider a paid option

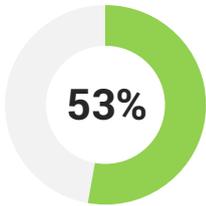
Top 5 Formats preferred program formats:

- #1** Free self-guided learning
- #2** Paid mini courses
- #3** Paid online short courses
- #4** Free MOOCs
- #5** Paid online graduate

Top 5 Motivators to pursue further education:

- #1** Intellectual challenge
- #2** Enhance effectiveness at work
- #3** Increase job security
- #4** Improve opportunities in research
- #5** Have more time availability now

Due to the current global developments...



claim their interest in pursuing further education has **increased**



expect their **personal spend with education to increase** in the next 6 months

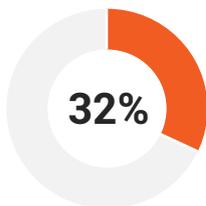


believe **online learning adoption will increase** in the near future

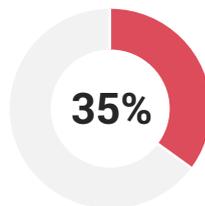
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

77%

would consider either a hybrid or online approach

Market Highlights

Top-3 Markets for Increasing Personal Spend on Education



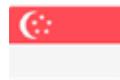
CHINA

65%



INDIA

49%



SINGAPORE

40%

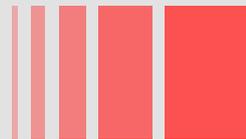


GLOBAL RESULTS

vs.

37%

Key Takeaways



LEARN MORE, SPEND MORE

Overall, interest in pursuing further education has *increased* due to current global events and people believe their personal spend on education will increase in the near future. Education is seen as a means to "future-proof" against events similar to this one. They also have more time now to dedicate to education and many people are interested in continuing to work remotely, giving them more time to pursue education.

Respondents expressed interest in learning how they can "future-proof" themselves in terms of hard and soft skills and being aware of future trends that affect their value to employers/job stability. The main reasons why interest in furthering education for some respondents has *decreased* are financial matters caused by the pandemic and a focus on other priorities. The travel ban that prevents them from studying abroad is also mentioned.



ONLINE LEARNING IS HERE TO STAY

It is believed that online learning adoption is going to increase, not only in the short term: **it is here to stay.**

In the short term, fear of the disease, governmental restrictions, and social distancing measures put in place make online learning the only option. However, in the long run, based on their current experience with remote work and remote learning, people will acclimate and learn to appreciate its benefits. Many respondents are seeing their quality of life improve by telecommuting in general.



HYBRID OR ONLINE, FREE OR PAID

Respondents were screened based on whether they intend to pursue any type of further education in the next 12 months or not. For those who intend to pursue some form of further education in the short term, more than three-quarters of participants will consider either a hybrid or 100% online approach to education.

Free offers are popular, but so are paid alternatives: 76% of those who consider a free option also consider a paid provider. Shorter formats, such as mini courses, short courses, and bootcamps – with a focus on immediate application of skills – are more often considered than longer formats.

Main Motivations for Pursuing Further Education

RESPONDENTS CITE A VARIETY OF REASONS FOR WANTING TO PURSUE FURTHER EDUCATION. SOME OF THE MORE COMMON RESPONSES INCLUDE:



FUTURE-PROOF THEMSELVES

I would like to both improve myself during this time and improve my job prospects and "future-proof" myself by increasing my options and skill set.

— Male, 45 years old, United States



LEARN SKILLS TO STAY RELEVANT

I believe job market will be very competitive and to stay relevant I will need some professional learning to upgrade myself.

— Male, 52 years old, India



MORE TIME AVAILABLE

Because in times of confinement and staying at home, we need to keep the mind occupied, learning about topics or professional training, thus expanding our knowledge for our profession.

— Female, 43 years old, Argentina



INCREASE JOB SECURITY AND ENSURE INCOME

Because of the Covid restrictions I would like to increase my skills and therefore earning capacity as I am frightened of the effects of Covid on employment and job security.

— Female, 43 years old, United Kingdom



Alternative education credentials such as certificates from short online programs will complement degree programs, giving learners many options to pursue what works best for their needs.

New student-centered models of education combined with global networks and ubiquitous information have changed not only what needs to be taught, but how best to teach it. It's time to apply innovation to learning.

— **Joshua Kim**

Director of Online Programs and Strategy at Dartmouth College



Online Learning is Here to Stay

IT IS BELIEVED THAT ONLINE LEARNING ADOPTION IS GOING TO INCREASE, NOT ONLY IN THE SHORT TERM – IT IS HERE TO STAY.

SHORT TERM

SOCIAL-DISTANCING & FEAR OF COVID-19

Social distancing may continue indefinitely, and people are afraid of getting sick and being in crowds. (It) is also more versatile, and many classes can be done according to your existing schedule.

United States

CONVENIENCE

During Coronavirus people discovered that online learning and work from home can save time, money, and effort lost before in getting to learning and workplaces.

United Arab Emirates

THE "ONLY-OPTION"

Online learning is the way things are being done now due to COVID-19. When it is realised that it might be an effective, more convenient, maybe easier way to teach and learn, I believe more individuals will opt for it.

United Kingdom



believe **online learning adoption will increase** in the near future¹

Market Highlights

LATAM

89%

CHINA

87%

LONG TERM

PEOPLE WILL "GET USED TO IT"

People are using it almost exclusively now out of necessity, and it will force innovation as well as get people used to using it. I think we will not see a complete shift to online, but a lot more blended learning as people realize it can be more effective and tailored than 30 people crammed in a classroom.

United States

IMPROVEMENT IN QUALITY OF LIFE

The current crisis has shown the value and feasibility of online working and study. It would be good if this could continue after the end of the restrictions.

United Kingdom

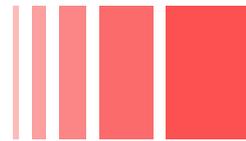
TECHNOLOGY AND EASE OF ACCESS

The importance of online platforms and software became clearer during this period. People got used to these platforms and learned the ease of use. I think they will not give up online platforms.

Germany

¹ Based on the current global developments, how do you expect online learning adoption to change in the near future. Top-2 Box results: 4 or 5 in a 5-point scale.

Best Practices in Online Learning



Early players in the education technology space set the stage for improving access to knowledge. Early entrants from the university landscape include MIT and Harvard, who make their content available for free or low cost. For those individuals who are highly motivated to learn, the content is out there, often for free or at a low cost. However, completion rates for Massive Open Online Courses (MOOCs) register at just 3% based on findings from researchers at MIT based on edX course data, meaning that most do not finish a course to completion for a variety of factors.

Other online learning opportunities cost more money, and not surprisingly, have a much higher rate of completion – since students are invested financially in the outcome.

Many adult learners who seek career advancement desire a certificate of completion from a top school to illustrate their dedication to learning new skills.

As cited previously in the report, our research shows that in light of recent global developments, 53% of respondents say their interest in pursuing further education has increased. Further, 80% believe that online learning adoption will increase in the future.

So as more people flock to online learning – some out of necessity, and others because it's an opportunity to upskill due to more time on their hands – here are some best practices from our learning approach that have worked well to drive lasting impact for learners.



Based on our experience of teaching more than 50,000 working professionals online, we've learned there's a high correlation between the degree of engagement with learners and the impact.

We study the data and measure outcomes. MOOCs were a great step towards the democratization of education, but for learning to have a deep, lasting impact, it's a mix of high-touch and high-tech that really works best.



Ashwin Damera
Co-Founder and CEO, Emeritus

HARNESSING HUMANS + TECHNOLOGY TO REPLICATE THE EFFECTIVENESS OF AN IN-CLASS EXPERIENCE, WHERE IMPACT HAPPENS IN REAL-TIME AND PARTICIPANTS FEEL SUPPORTED THROUGHOUT THE ENTIRE EXPERIENCE.

Based on our experience of educating over 50,000 individuals from 160+ countries in a 100% online environment, we understand what leads to lasting impact. Here are the elements that we believe are best practices for driving real, meaningful impact for learners in an online environment.

Live teaching from world-class faculty

Direct access to top thought leaders who have strong academic standing as well as a secure foothold in industry; best of both worlds provides learning the latest trends and tools in real time



Interactive activities such as simulations, crowd-sourcing, polls, role-playing

Practice what's being taught in a way that builds capabilities and confidence, whether it's learning to code Python or creating a marketing budget



Application exercises

Offer ample opportunities to apply the learning to real-world situations



Live office hours for Q&A/deeper dives

When topics require more explanation or a deeper dive, then live office hours hosted by a subject matter expert help to fill any gaps in the learning, ensuring a positive outcome for all participants



Outcome-based learning design

Expert instructional designers who create a logical progression of the topics, design with learning objectives in mind, and work with faculty to bring their concepts to life online



Peer learning/moderated peer discussion boards

Learn from others' experiences through a global audience for broader perspectives and networking



Dedicated program support to answer tech questions

When participants hit a virtual pothole, they don't want to feel alone; tackling the isolation issue is addressed by a live, responsive support team



Mix of synchronous and asynchronous learning

Applying the model of the flipped classroom: recording lectures on video and utilizing live sessions to discuss how topics can be applied



Knowledge checks

Designed to reinforce the most important concepts; required element for achieving the Certificate of Completion



Graded exercises and personalized feedback

Subject matter experts offer personalized feedback to participants, to make the impact as high as possible for real-world application



Additional resource libraries

To dig deeper into a topic, resource libraries help participants reach their goals by offering materials that go beyond the scope of the program



Mobile learning app/easily accessible

Make it easy for individuals to access the learning from any device, anywhere in the world (with cell or wifi access)



Offer courses in multiple languages

To extend the reach and the global impact, offer courses in other languages, such as Mandarin, Spanish, and Portuguese, where the largest population centers are hungry for knowledge



Online Learning – Featured Examples

There may be a perception that online learning is boring or lacks personal engagement. Across the more than 100 programs that Emeritus delivers with its university partners and on its own, different teaching methods are used in order to create a truly dynamic and impactful learning experience. Some examples include:



Example 1: The Objection Matrix

Northwestern
Kellogg
School of Management

EXECUTIVE EDUCATION

Kellogg Mastering Sales: A Toolkit for Success

The purpose of this sales tool is to help you be ready with the expert moves required to handle any objection that comes your way.

Use the five-step objection handling process and capture:

- The most common objections you encounter
- Clarifying questions that will unpack the objection
- The best response to the objection
- The three critical disciplines: encourage, confirm, and check

Objections are a natural and necessary part of any sales process. Salespeople who display poise and empathy during objection handling truly set themselves apart.

“

The course gives structure to gain focus, learn, and practice new skills. Also it has raised my awareness of the words I choose and how, when, and why I am using them in targeting, acquiring, and nurturing my business relationships.



Example 2: AI as a Teacher

MIT Sloan Mastering Negotiation and Influence

One of the highlights of this program is the use of iMotions Affectiva, which is an expression analysis technology from MIT's Media Lab. It recognizes emotion based on facial cues or physiological responses.

During a live negotiation, the technology will map your face. Then, it will produce a report indicating how many times your face displayed different affect states. You will then reflect on how your facial expressions influence your ability to get across your message and what you might change. There are nine negotiation simulations in the program, offering ample opportunities to put the concepts into practice.



The substantive content was great. The lesson on influencing tactics was very useful and insightful. Doing real-world research to gather objective information, and then applying that to a negotiation scenario was very useful – it brought some of the prior principles to life.



Example 3: Getting Dirty in the Data

Wharton Business Analytics: From Data to Insights

This program provides managers and leaders an understanding of how analytics can help improve their decision-making process.

This program will help you look at data and identify insights, improve your ability to make predictions, and prescribe future actions to help make better business decisions. The data analytics simulation provides an opportunity to apply data analytics concepts to a real-world scenario.



I've learned a lot from fellow course-mates on the discussion board. They are already doing analytics in their daily work and those examples provide good insights for me.



Example 4: Your Fast Track to a Job in Data Science



THAYER SCHOOL OF
ENGINEERING
AT DARTMOUTH

Dartmouth Professional Certificate in Applied Data Science

This curriculum is based on portions of the Masters of Engineering Management Program taught at Dartmouth College by Professor Geoffrey Parker. It is organized around the skills that technology giants – such as Amazon, Google, Facebook, Apple, and McKinsey – value in data science professionals.

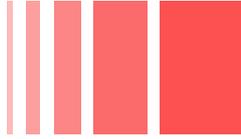
Following the hands-on 4-week Python coding camp, you will:

- Explore plotting tools used to render easily comprehensible visualizations
- Practice data cleaning and assembling complex datasets
- Interpret the output of models in ways that can be communicated to a general audience
- Create a Dash interactive app in Python
- Develop a project and presentation to demonstrate the knowledge of the various tools and techniques explored in the program



The career assignment forced us to engage with our classmates and share best practices.

Behavioral Shifts in a Covid World



WILL ONLINE LEARNING BE STICKY IN A POST-COVID WORLD?

Sometimes during times of crisis, change happens faster. Transitions to new technology or new ways of doing things are done out of necessity. Sometimes these behaviors stick and other times we revert back to our old ways of doing things. Will online learning be sticky?

As the world tries to break free from the grip of the Covid-19 crisis, our research shows that many professionals are willing to embrace the new way of learning and working, as they see many benefits to their lives, both personally and professionally. For example, they report:

- More free time due to no commute time
- More flexibility in their schedule
- Cost savings from doing things in new ways

If there was a stigma around online learning — that it was either boring or ineffective — there is now enough evidence to prove otherwise. Behavior shifts are often a social phenomenon and people change in groups. But when everybody does it, there is no stigma. We believe this is the case with online learning, it has reached its tipping point and is mainstream.



Short-form online certificate programs offer an ideal opportunity to support continuous learning and career advancement that complements traditional models.



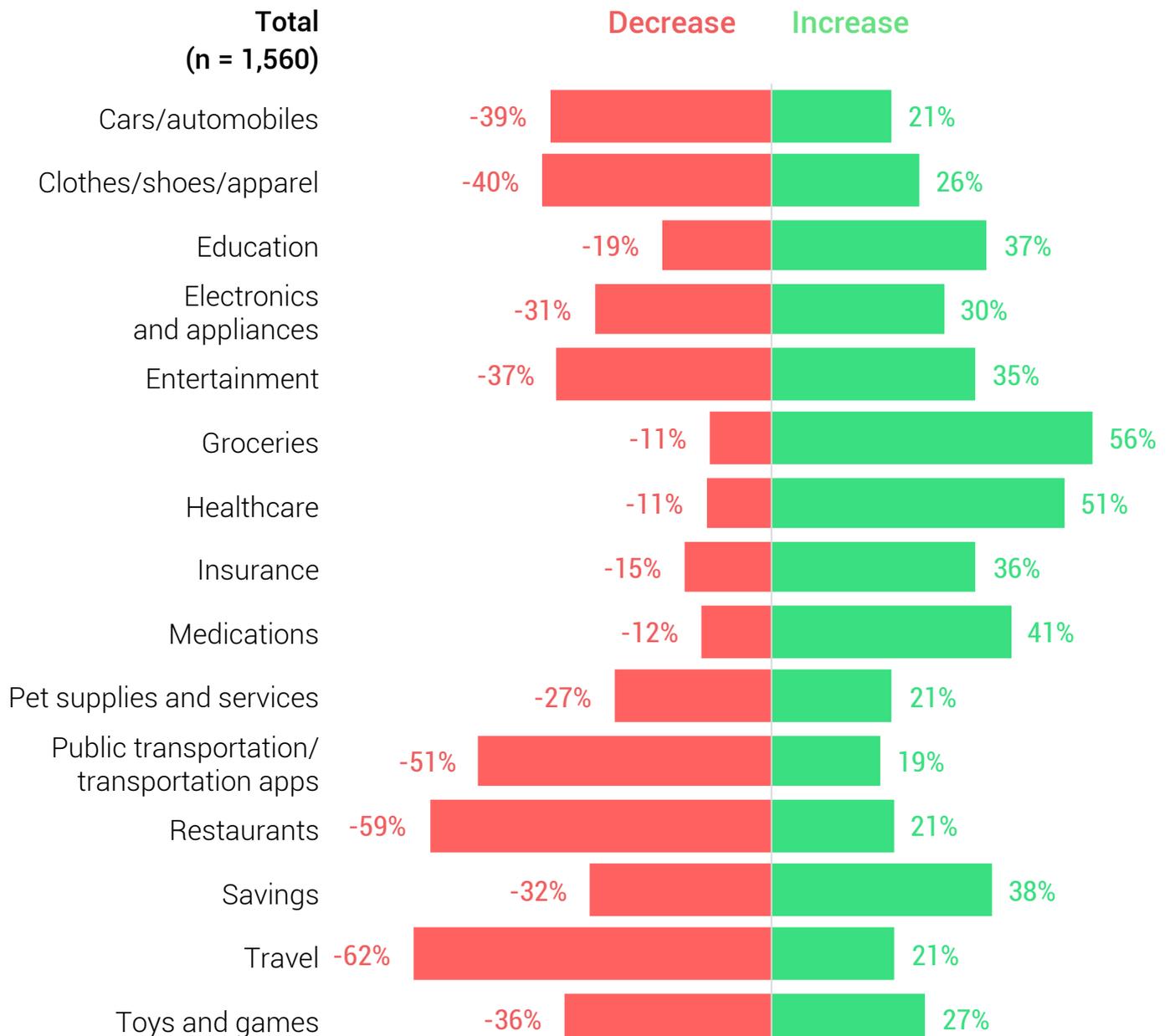
At Berkeley Haas, with six degree programs and Exec Ed, we have the unique opportunity to directly impact business and society through learning development and programs that span all levels — and to innovate ourselves with education delivery methods.

— **Mike Rielly**

CEO of UC Berkeley Executive Education at the Haas School of Business

Personal Spend in the Next 6 Months

Personal spend with education is expected to increase across all markets, especially in China and India. The +18% index for education is significantly high among categories, standing behind only essential items (e.g., groceries and healthcare).

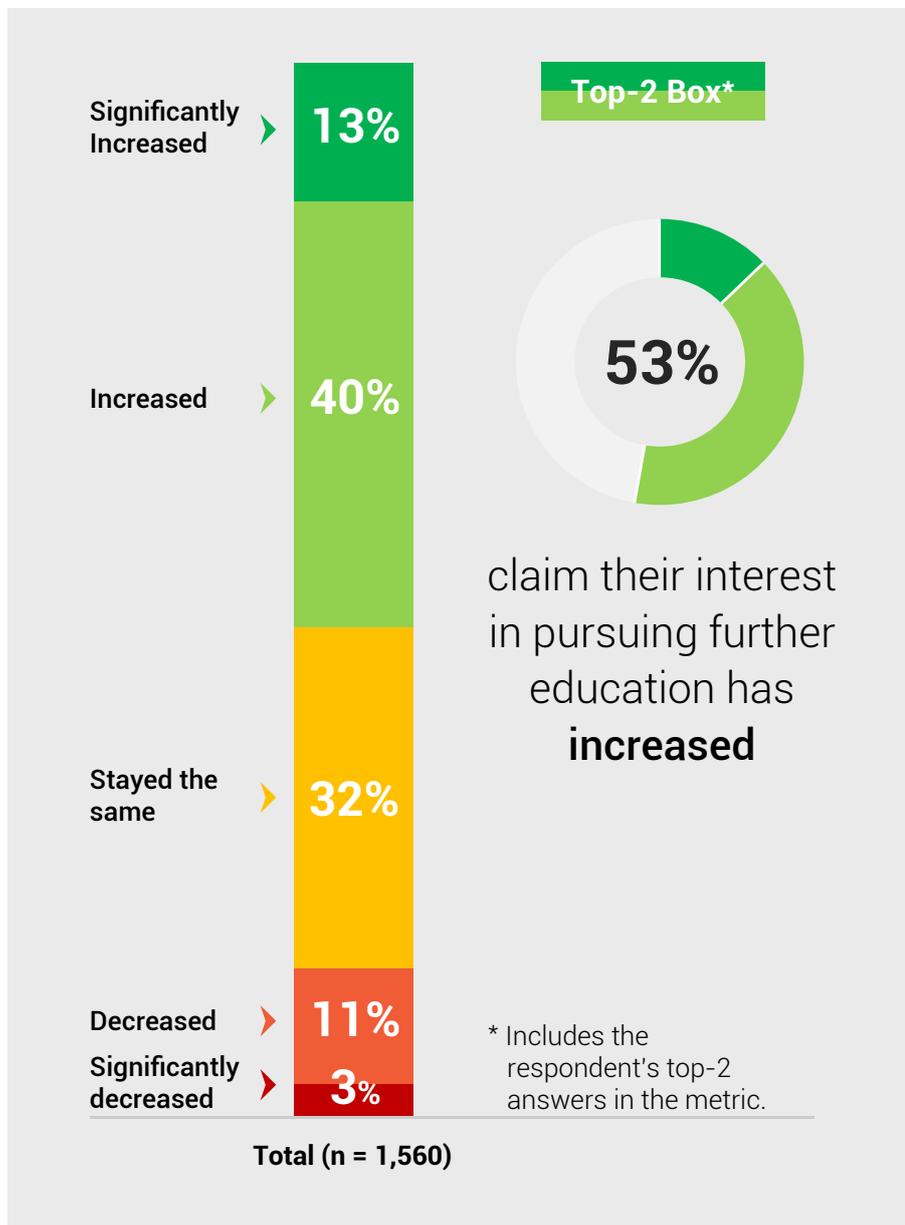


Increased Interest in Pursuing Further Education Change

HOW INTEREST IN PURSUING FURTHER EDUCATION HAS CHANGED DUE TO CURRENT GLOBAL DEVELOPMENTS

Interest in pursuing further education is increasing. More than half of respondents claim that their interest in pursuing further education has increased due to the current global events.

Interest is increasing mainly because people are looking for ways to **“future-proof” themselves** by learning skills that will help them maintain or find the **best job-opportunities**. That will allow them to **increase their income** and **grow their savings** to ensure security for them and their families in the future. They also have more time on their hands now to learn and many are interested in learning skills and competences that will help them to continue working remotely.



And U.S. Respondents are Willing to Spend?

\$6,342

Based on U.S. survey respondents, for those who plan to pursue further education in the near term, they are willing to spend \$6,342 on average for education that includes 100% online learning.

Why has Interest in Pursuing Further Education Increased?

I've had more time to look for other jobs and discover some possibilities for me outside of my career right now.

- **United States**

The worry of not knowing where I stand with my job is making me want a back up.

- **United Kingdom**

Globalization makes me feel that the previous academic qualifications are not enough. Only by increasing knowledge and increasing professional knowledge can we stand and improve in an industry.

- **China**

The quarantine has made me take up everything related to my profession: new strategies to improve my work, how to benefit workers and how to achieve my goals in a better way, in a reasonable time and with beneficial results for all.

- **Colombia**

These are unusual times, it may be helpful to benefit from the experience of others (more than in normal times).

- **Germany**

Due to the current lockdown, I have come to realize that digital skill is really important and have decided to dedicate my time and money in acquiring one for myself as soon as possible.

- **Singapore**

Since I'm restricted to home, I feel strongly that I should get into work which could be done completely remotely.

- **India**



Survey Findings – Country Specific Data

OVERVIEW: PERSONAL SPEND

As noted in the earlier section, interest in pursuing further education is increasing. More than half of respondents claim that their interest in pursuing further education has increased due to the current global events. This is especially true for respondents in China and India, where the index for spending on education is significantly higher than the overall average and for other countries.

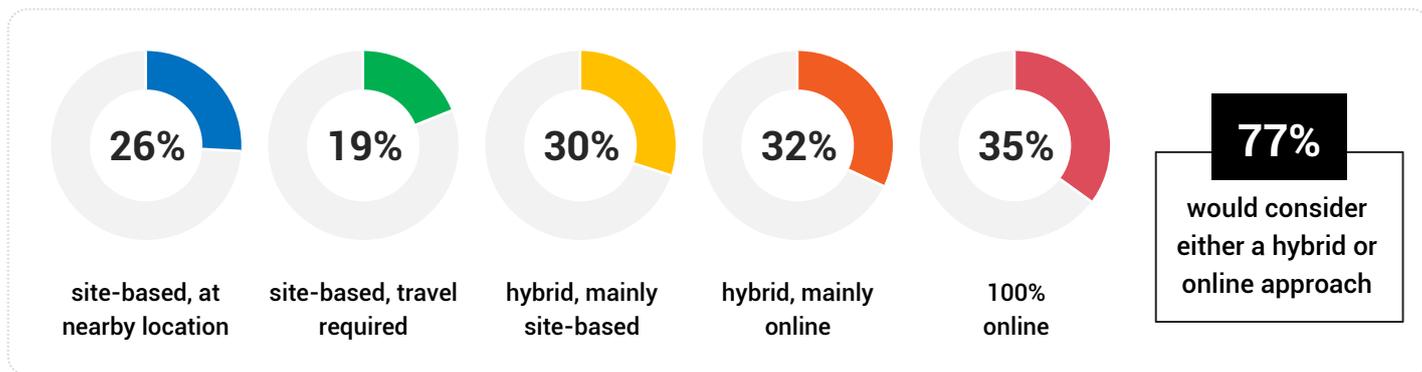
Note: For the total survey sample (N=1,560), the index for spending more on education is +18%, significantly higher than most other categories except for essential items such as groceries and healthcare.

For China (N=156), the index is 56% – meaning that more than half of survey respondents in China plan to increase their spending on education in the next six months. For India, the index is 34% (N=156), suggesting that those in India also plan to invest more in education in the next 6 months to “future-proof” themselves and try to improve their job security.

United Arab Emirates is the only country that does not show a positive index for increasing spending in education. This may be due to the fact that there are many ex pats living in UAE and if the economy weakens substantially there, they may choose to move elsewhere.

CONSIDERED APPROACHES TO FURTHER EDUCATION

Not surprisingly, consideration of online learning is very high, with nearly eight in every ten respondents willing to consider either a hybrid or 100% online approach.

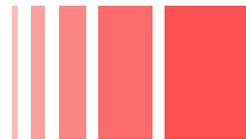


When looking at the considered approaches to learning by country, we see that the UK is the most willing to consider a fully online learning solution at 49% and Singapore the least likely at 22%. Respondents in the LATAM region are also very willing to consider a fully online learning solution at 46%.

Note: Multiple-choice question; respondents were accounted for if they consider at least one of the following options: hybrid, mainly site-based; hybrid, mainly online; 100% online; if they consider more than one of these options, they are only accounted for once.

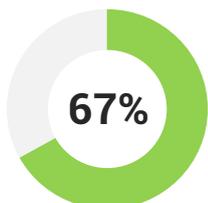
Note: The index is calculated by taking the percent who claim their spending will increase and subtracting the percent who say it will decrease (Index= % increase - % decrease).

China



Among the nine regions surveyed, participants from China are the most willing to increase their spending on education in the next six months. They are also quite open to the idea of online education. Paid online short courses received the highest interest (47%), with a tie for the second-most cited option between paid online bootcamps (31%) and paid online graduate programs (31%).

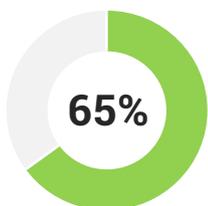
Due to the current global developments...



claim their interest in pursuing further education has **increased**

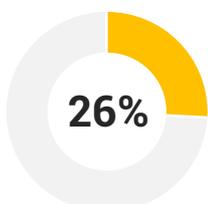


believe **online learning adoption will increase** in the near future



expect their **personal spend with education to increase** in the next 6 months

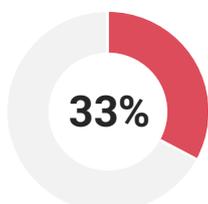
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

92%

would consider either a hybrid or online approach

Top 5 Formats

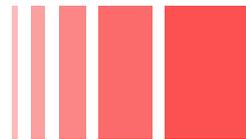
preferred program formats:

- #1 Paid online short courses
- #2 Paid online bootcamps
- #3 Paid online graduate
- #4 Paid online professional certificates
- #5 Paid MOOCs

Top 5 Motivators

to pursue further education:

- #1 Enhance effectiveness at work
- #2 Increase job security
- #3 Get a promotion
- #4 Intellectual challenge
- #5 Have more time availability now



Respondents from India expect to increase their spending on education in the next six months, the second highest level of increase expected among all geographies at 49%. This population believes that online learning adoption is going to increase substantially in the near future – 86% – the third highest among all geographies.

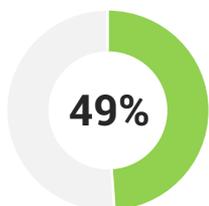
Due to the current global developments...



claim their interest in pursuing further education has **increased**

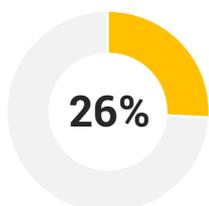


believe **online learning adoption will increase** in the near future

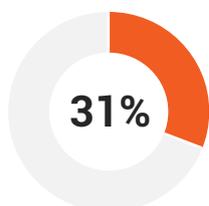


expect their **personal spend with education to increase** in the next 6 months

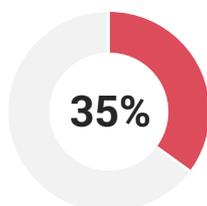
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

72%

would consider either a hybrid or online approach

Top 5 Formats

preferred program formats:

- #1 Free self-guided learning
- #2 Paid online short courses
- #3 Free MOOCs
- #4 Paid online professional certificates
- #5 Paid mini courses

Top 5 Motivators

to pursue further education:

- #1 Increase job security
- #2 Improve opportunities in research
- #3 Enhance effectiveness at work
- #4 Intellectual challenge
- #5 Get a new job

LATAM (Argentina, Chile, Colombia, Mexico, and Peru)

Respondents in Latin America (including Argentina, Chile, Colombia, Mexico, and Peru) overwhelmingly believe that online learning adoption will increase in the near future (89%) – the highest rate among any of the countries surveyed. Further, 56% claim their interest in pursuing further education has increased, slightly higher than the global results of 53%.

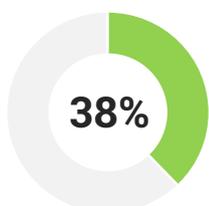
Due to the current global developments...



claim their interest in pursuing further education has **increased**

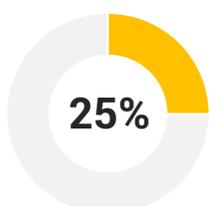


believe **online learning adoption will increase** in the near future

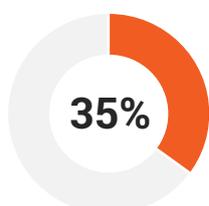


expect their **personal spend with education to increase** in the next 6 months

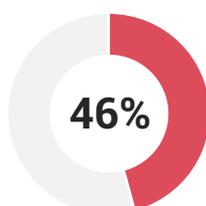
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

87%

would consider either a hybrid or online approach

Top 5 Formats

preferred program formats:

- #1 Free self-guided learning
- #2 Paid mini courses
- #3 Free MOOCs
- #4 Paid online short courses
- #5 Paid MOOCs

Top 5 Motivators

to pursue further education:

- #1 Intellectual challenge
- #2 Increase job security
- #3 Enhance effectiveness at work
- #4 Have more time availability now
- #5 Build their network

United Kingdom

Respondents in the United Kingdom report their interest in pursuing further education has increased at a rate just above the global results for all countries (55% for UK vs. 53% globally). The degree to which they believe online learning adoption will increase in the near future is also near the global results (78% for UK vs. 80% globally).

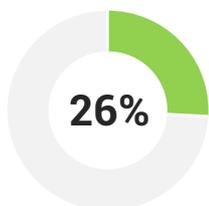
Due to the current global developments...



claim their interest in pursuing further education has **increased**

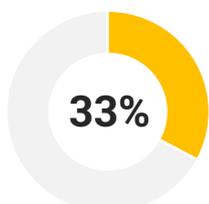


believe **online learning adoption will increase** in the near future



expect their **personal spend with education to increase** in the next 6 months

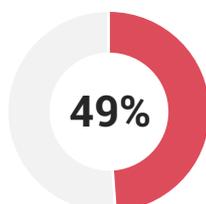
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

80%

would consider either a hybrid or online approach

Top 5 Formats

preferred program formats:

- #1 Free self-guided learning
- #2 Paid mini courses
- #3 Free MOOCs
- #4 Paid online short courses
- #5 Paid online graduate

Top 5 Motivators

to pursue further education:

- #1 Intellectual challenge
- #2 Get a new job
- #3 Increase job security
- #4 Enhance effectiveness at work
- #5 Improve opportunities in research

United States

For respondents in the United States, interest in pursuing further education due to current global events is just a little above the global results (55% for U.S. vs. 53% globally). This group expects to spend more on education in the next six months, but at a slower pace than the overall index for personal spending (13% for U.S. vs. 18% average for the global index).

Due to the current global developments...



claim their interest in pursuing further education has **increased**

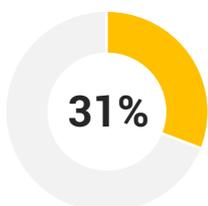


believe **online learning adoption will increase** in the near future

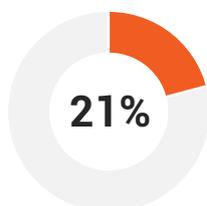


expect their **personal spend with education to increase** in the next 6 months

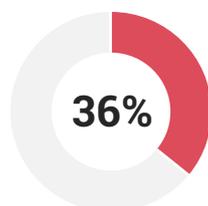
Considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

74%

would consider either a hybrid or online approach

Top 5 Formats

preferred program formats:

- #1 Paid mini courses
- #2 Free self-guided learning
- #3 Free MOOCs
- #4 Paid online short courses
- #5 Paid online graduate

Top 5 Motivators

to pursue further education:

- #1 Intellectual challenge
- #2 Increase job security
- #3 Enhance effectiveness at work
- #4 Have more time availability now
- #5 Improve opportunities in research

France

Respondents from France are the least likely to pursue further education due to recent global developments (39% for France vs. 53% globally). They also believe that online learning adoption will increase, but at a lower rate than the global results (66% for France vs. 80% globally). Fifty-nine percent would consider either a hybrid or online approach.

Top 5 Formats preferred program formats:

- #1 Paid mini courses
- #2 Free MOOCs
- #3 Paid online short courses
- #4 Free self-guided learning
- #5 Paid online professional certificates

Top 5 Motivators to pursue further education:

- #1 Enhance effectiveness at work
- #2 Intellectual challenge
- #3 Increase job security
- #4 Get a new job
- #5 Get a credential

Germany

Respondents from Germany are the second least likely to pursue further education due to current global developments (41% for Germany vs. 53% globally). They also believe that online learning adoption will increase, but to a lesser degree than the global results (72% for Germany vs. 80% globally). Seventy-nine percent would consider either a hybrid or online approach.

Top 5 Formats preferred program formats:

- #1 Paid mini courses
- #2 Free self-guided learning
- #3 Paid online short courses
- #4 Free MOOCs
- #5 Paid MOOCs

Top 5 Motivators to pursue further education:

- #1 Intellectual challenge
- #2 Enhance effectiveness at work
- #3 Increase job security
- #4 Have more time availability now
- #5 Build their network

Singapore

Respondents from Singapore report a strong increase in their desire to pursue further education due to current global developments, with 60% indicating this intention, second only to China (67%) among the nine geographies surveyed. Eighty-five percent of respondents believe that online learning adoption will increase, higher than the global results of 80%.

Top 5 Formats preferred program formats:

- #1 Paid mini courses
- #2 Paid online graduate
- #3 Paid online short courses
- #4 Free self-guided learning
- #5 Paid online professional certificates

Top 5 Motivators to pursue further education:

- #1 Increase job security
- #2 Intellectual challenge
- #3 Enhance effectiveness at work
- #4 Build their network
- #5 Get a promotion

United Arab Emirates

Respondents from the United Arab Emirates believe that online learning adoption is expected to increase at about the same rate as the global results (79% for UAE and 80% globally). UAE is the only region where personal spending on education is expected to be flat, whereas all other regions expressed a positive index for education spending. This may be explained in part by the large number of foreigners living in UAE, and if the economy declines, they could choose to move to another region.

Top 5 Formats preferred program formats:

- #1 Paid online short courses
- #2 Free self-guided learning
- #3 Paid mini courses
- #4 Free MOOCs
- #5 Paid online professional certificates

Top 5 Motivators to pursue further education:

- #1 Increase job security
- #2 Enhance effectiveness at work
- #3 Intellectual challenge
- #4 Improve opportunities in research
- #5 Get a new job

Conclusion

There's no question the world is forever changed because of the global pandemic. The question is: *will society decide to adopt new behaviors around how we learn and how we work for the long term, or will we revert back to the conventional ways?*

The results of our Global Online Learning Sentiment survey suggest that there is a willingness to embrace the 'new normal', including how learning is delivered. The research shows there is an appetite for increasing one's skills and capabilities to ensure job security, drive earning potential, and "future-proof" oneself. While there are some fluctuations among countries, 80% of respondents overall believe that online learning adoption will increase in the near future.

Individuals and organizations can reimagine how learning happens. If there was a perception that online learning is a diminished experience, there is enough data to prove otherwise.

The pace of change in our digital economy is mind-blowing, and those who stay relevant by re-skilling and up-skilling will prosper, while others will be left behind. Emeritus is committed to its mission of bringing high-quality education that is affordable and accessible to all corners of the globe. We do this by following best practices and creating next practices where high-touch and high-tech deliver learning outcomes with lasting impact.



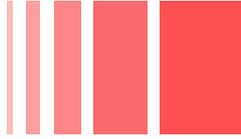
People are looking at how they can make sure they're as prepared as they can be for what the future brings.

The courses that we're finding the most demand for are those where people are learning a new skill that they feel is really important to help them succeed. Topics like business analytics, for instance. People want to make sure they are fluent in the new language of business to maximize their value to employers and job prospects.



Lisa Rohrer
*Director of University Partnerships,
Emeritus*

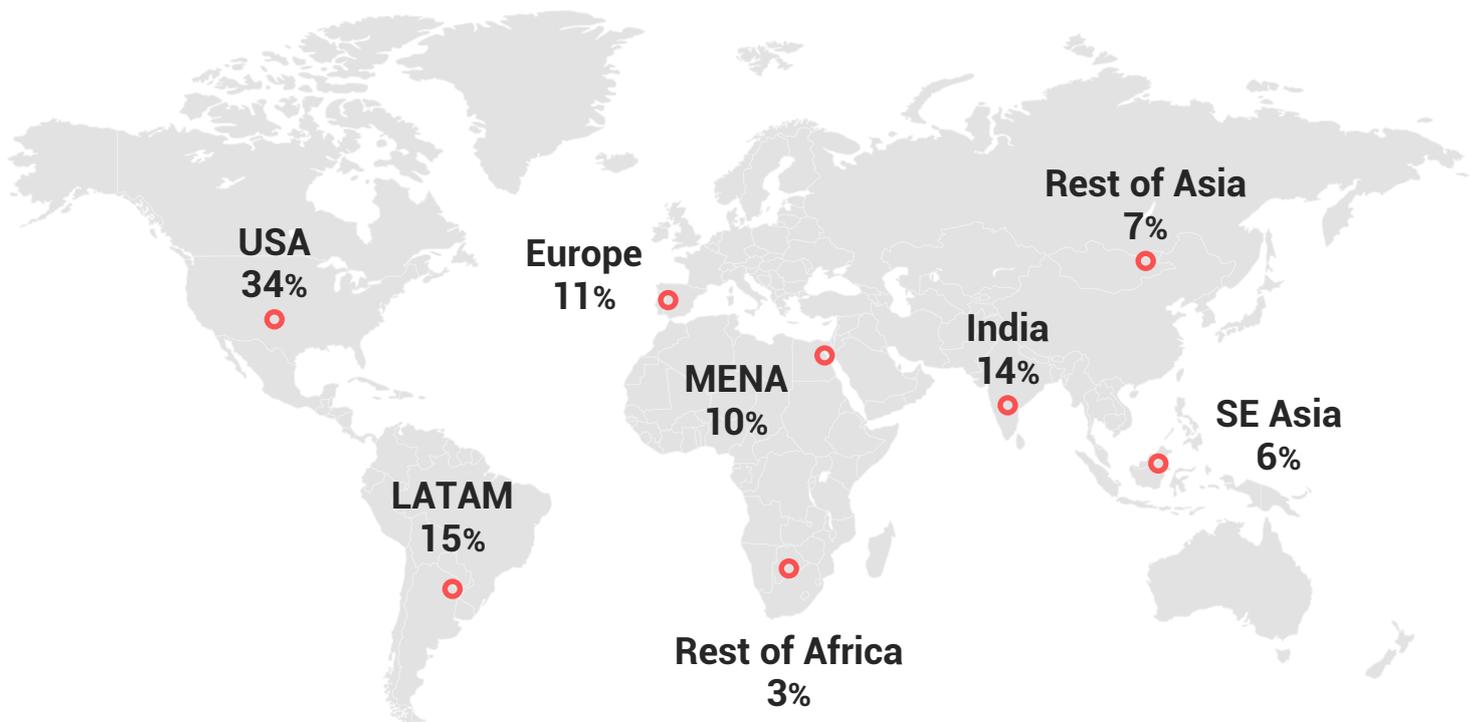
About Emeritus



Emeritus offers professional education courses in collaboration with top-ranked universities: MIT, Columbia, Dartmouth, Wharton, UC Berkeley, Cambridge, London Business School and others. Using technology and curriculum innovation, Emeritus enables working professionals who cannot enroll in full-time courses to access a top-tier, affordable education that will give them the skills needed to be the business leaders of tomorrow.

- Emeritus has partnerships with over 30 global universities
- In three years, course offerings have gone from seven courses for 450 students to offering more than 100 courses for over 50,000 students
- Emeritus' global team includes 550+ employees located in Boston, Dubai, Mexico City, Mumbai, New Delhi, Shanghai and Singapore

Enrolment Split by Geography





www.emeritus.org