



GLOBAL CONSUMER SENTIMENT SURVEY

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

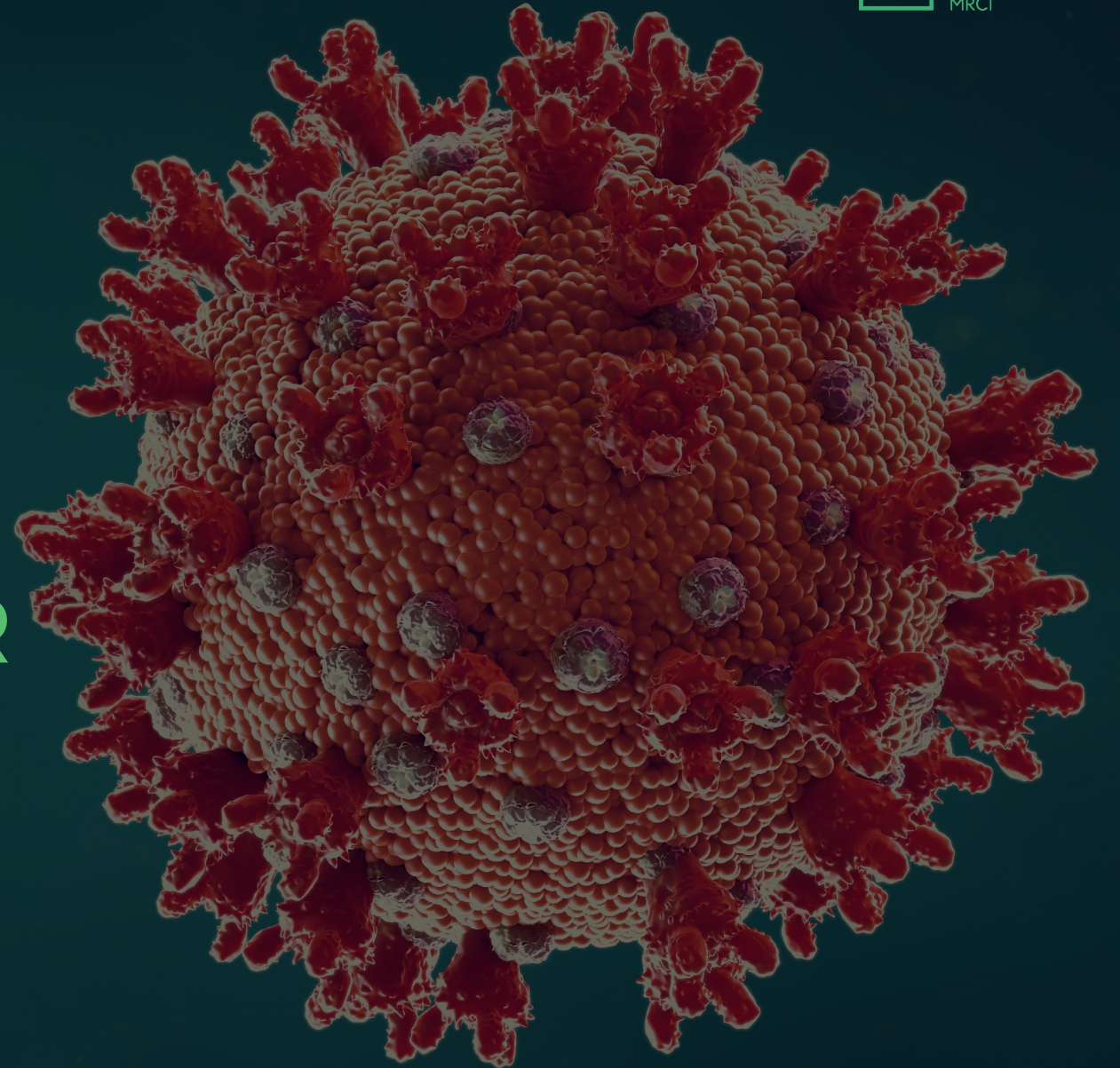
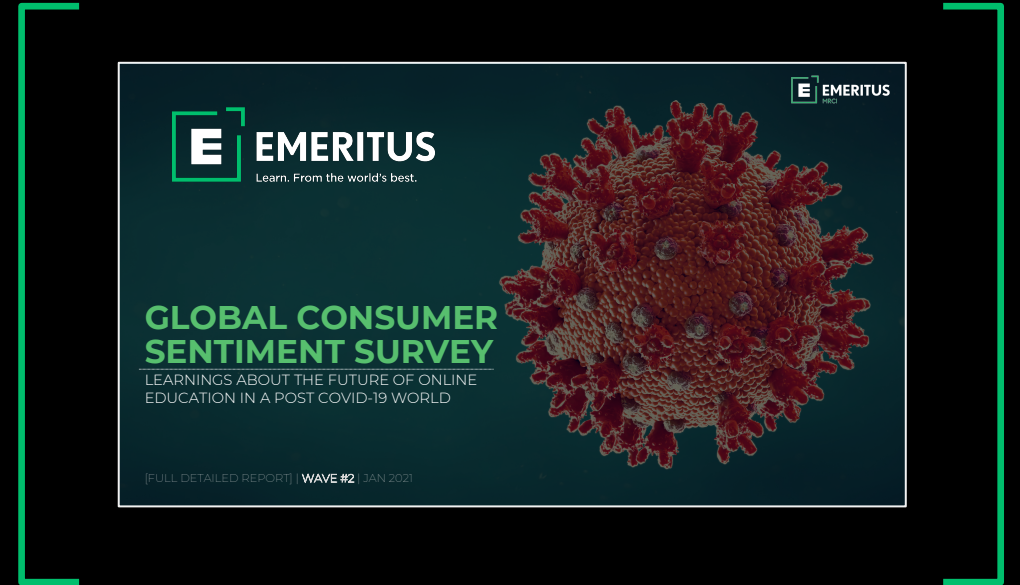




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PROJECT SPECS

Global Consumer Sentiment | Jan 2021

Data Collection, Target Audience and Sample

DATA COLLECTION METHOD

Online questionnaire CASI on Qualtrics®

INSTRUMENT

CASI – 10-minute survey

DATA COLLECTION PERIOD

January 14th through January 24th, 2021

SAMPLING METHOD

Stratified Random Sampling.
Online panel managed by Qualtrics®.

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.

SAMPLE DISTRIBUTION

COUNTRY/REGION	Sample	Weight ¹
Brazil	160	10%
China	160	10%
France	160	10%
Germany	160	10%
India	520	10%
Latam ²	168	10%
Singapore	160	10%
United Arab Emirates	160	10%
United Kingdom	174	10%
United States of America	310	10%
GLOBAL	2,132	-

¹Weight was applied in order to all countries have the same representation.

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

KEY TAKEAWAYS



LEARN MORE, SPEND MORE

Consistent with the learnings from 2020, overall, **interest in pursuing further education continues to increase** due to the current global events, and people believe their **personal spend with education will increase** in the near future.

Education is seen as a way to "**future-proofing**" against events similar to this one, but also as a gateway to **career advancement**. It is a matter of evolving and not just being safe in their job.

Financial matters caused by the pandemic and a focus in other priorities are the main reasons why interest has decreased for a smaller portion. The travel ban that prevents them from studying abroad also continues to be brought up.

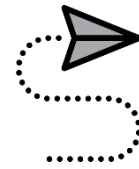


ONLINE LEARNING IS (STILL) HERE TO STAY

Consistent with the results from 2020, **it is believed that online learning adoption is going to increase, not only in the short term – it is here to stay!** We can see that prejudice against online learning options is declining.

In the **short term**, fear of the disease, governmental restrictions and social-distancing measures put in place will make online learning the only option.

In the **long run**, based on their current experience with remote work and remote learning, people will get used to it and will appreciate its benefits. They are seeing that their quality of life can be improved by telecommuting in general.



HYBRID OR ONLINE, FREE OR PAID

Online learning consideration is high! More than three-quarters of participants consider either a **hybrid or 100% online approach to education**.

Free offers are popular, but so are paid alternatives. **81% of those who consider a free option also consider a paid provider.**

Shorter formats, with short term outcomes, such as mini courses, short courses and bootcamps, are more often considered than longer formats.

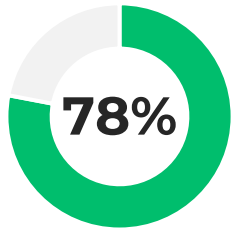
They also have **more time** now to dedicate to learning and improving skills, and **bite-sizing** learning might be a great way to start their journey!



ONLINE EDUCATION TRENDS

Online learning adoption is (still) here to stay!

How online learning adoption is expected to change in the near future

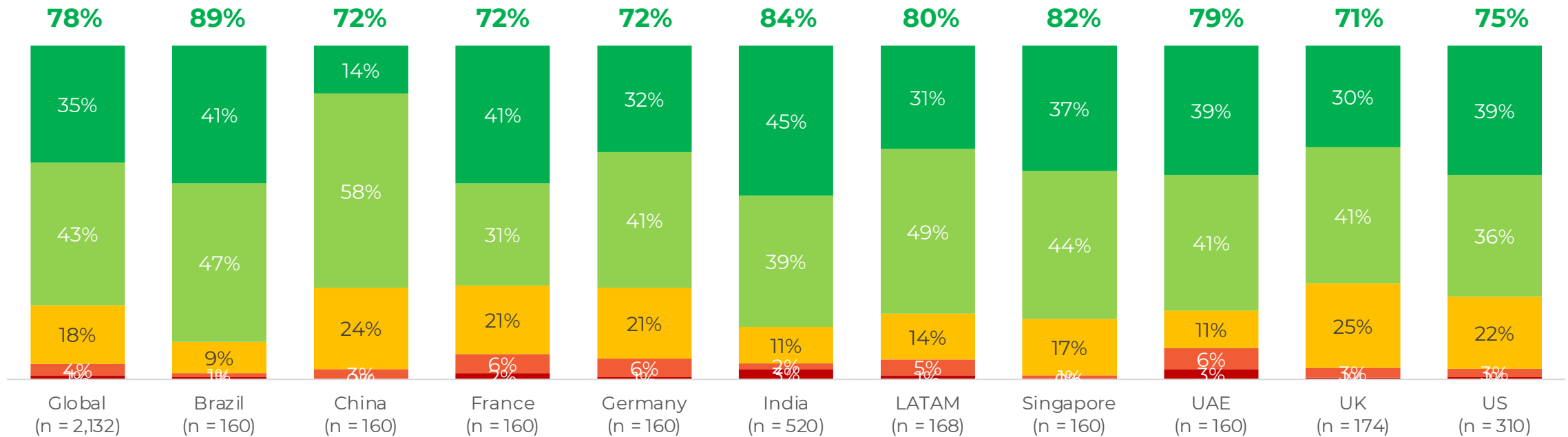


believe **online learning adoption will increase** in the near future

Participants believe online learning adoption is going to increase in the near future. Participants perceive that online learning allows more flexibility, convenience, and work-study-personal life balance. It is also perceived as a time-saving option, as well as more affordable. Due to the pandemic, more and more people experienced online education, making them more comfortable with the approach and reducing some of the prejudices related to the modality.

T2B¹
Top 2 Box

■ Significantly decreased ■ Decreased ■ Stayed the same ■ Increased ■ Significantly increased



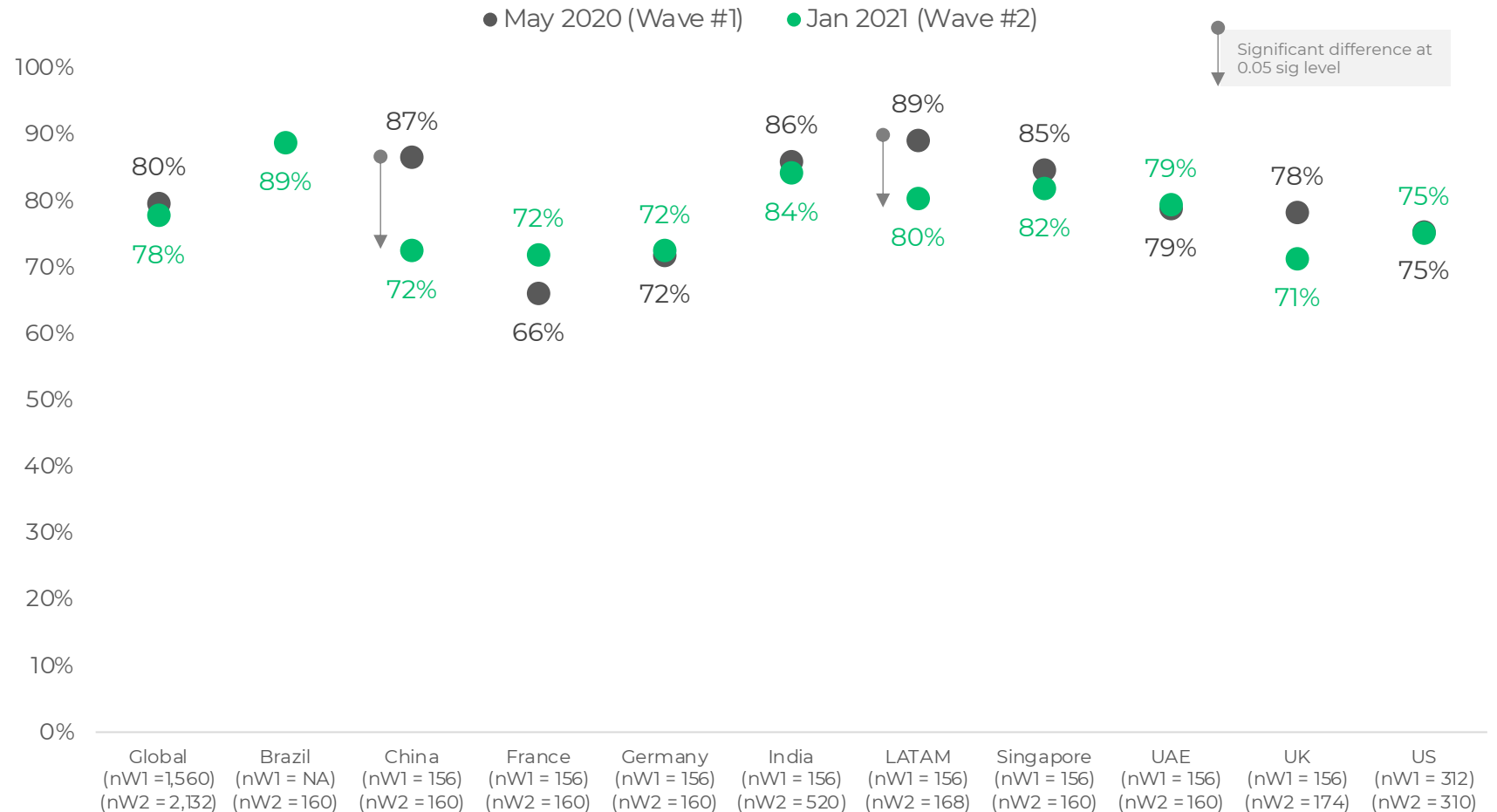
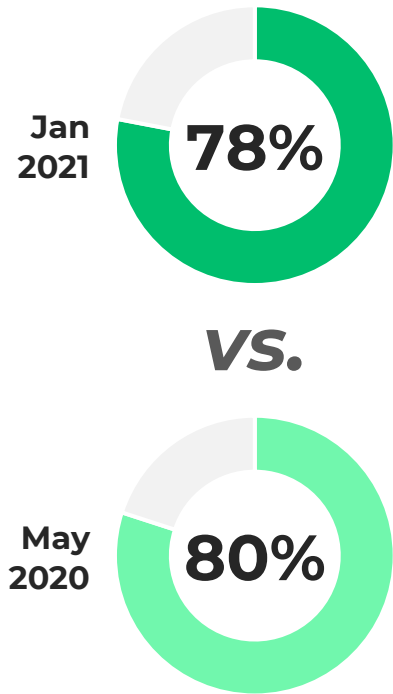
T2B sig. dif.

CHI, FRA,
GER, UK, US

Online learning adoption is (still) here to stay!

How online learning adoption is expected to change in the near future | **Wave #1 x Wave #2**

believe **online learning adoption will increase** in the near future
T2B (Top 2 Box) Results¹



Based on the current global developments, how do you expect online learning adoption to change in the near future? | ¹ T2B results: 4 or 5 in a 5-point scale.



There is still some discomfort with online learning

Why online learning adoption will decrease according to a small number of respondents



*I hope diminishes, because I believe that there are people like me who **do not feel comfortable with this approach.***

-- Mexico

*The **pressure of work and life** increased, **decreased income.***

-- United States

*No doubt the world has changed a lot in 2020 but **I believe the norm will return** and things will be better and offline classes will return.*

-- India

*Because **we don't need it when the pandemic is gone.***

-- Germany

*With the **vaccine** virus will decrease.*

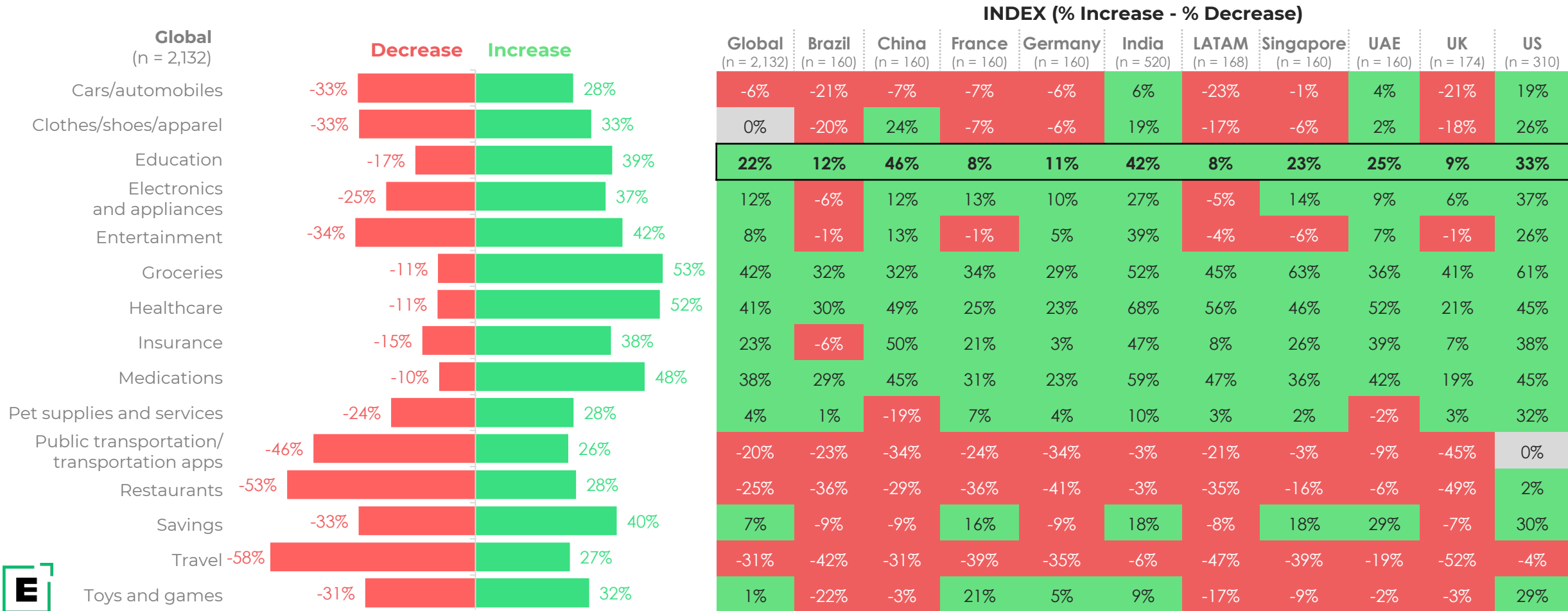
-- France



Personal spend with education is expected to increase

Personal spend with the following categories, in the next 6 months, will...

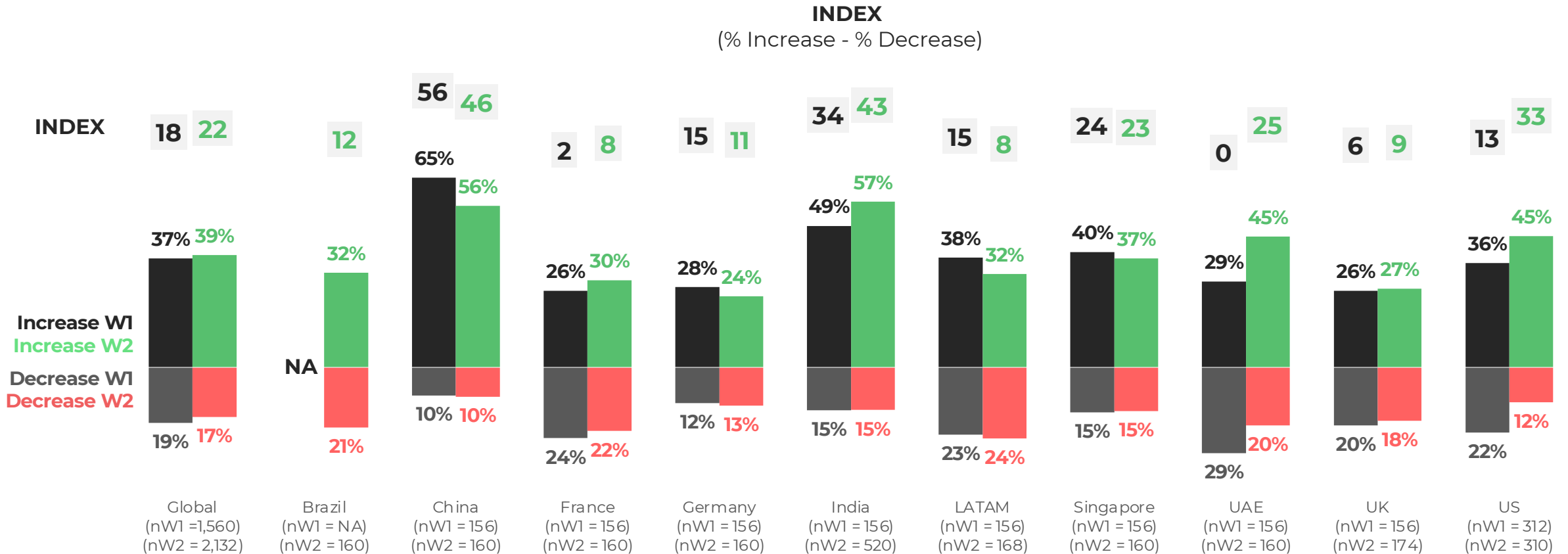
The 22% index is significantly high among categories, standing **behind only essential items** (e.g., groceries, healthcare, and medications).



Based on the current global developments (especially the COVID-19 pandemic), would you say that your personal spend with each of the following categories, in the next 6 months, will...

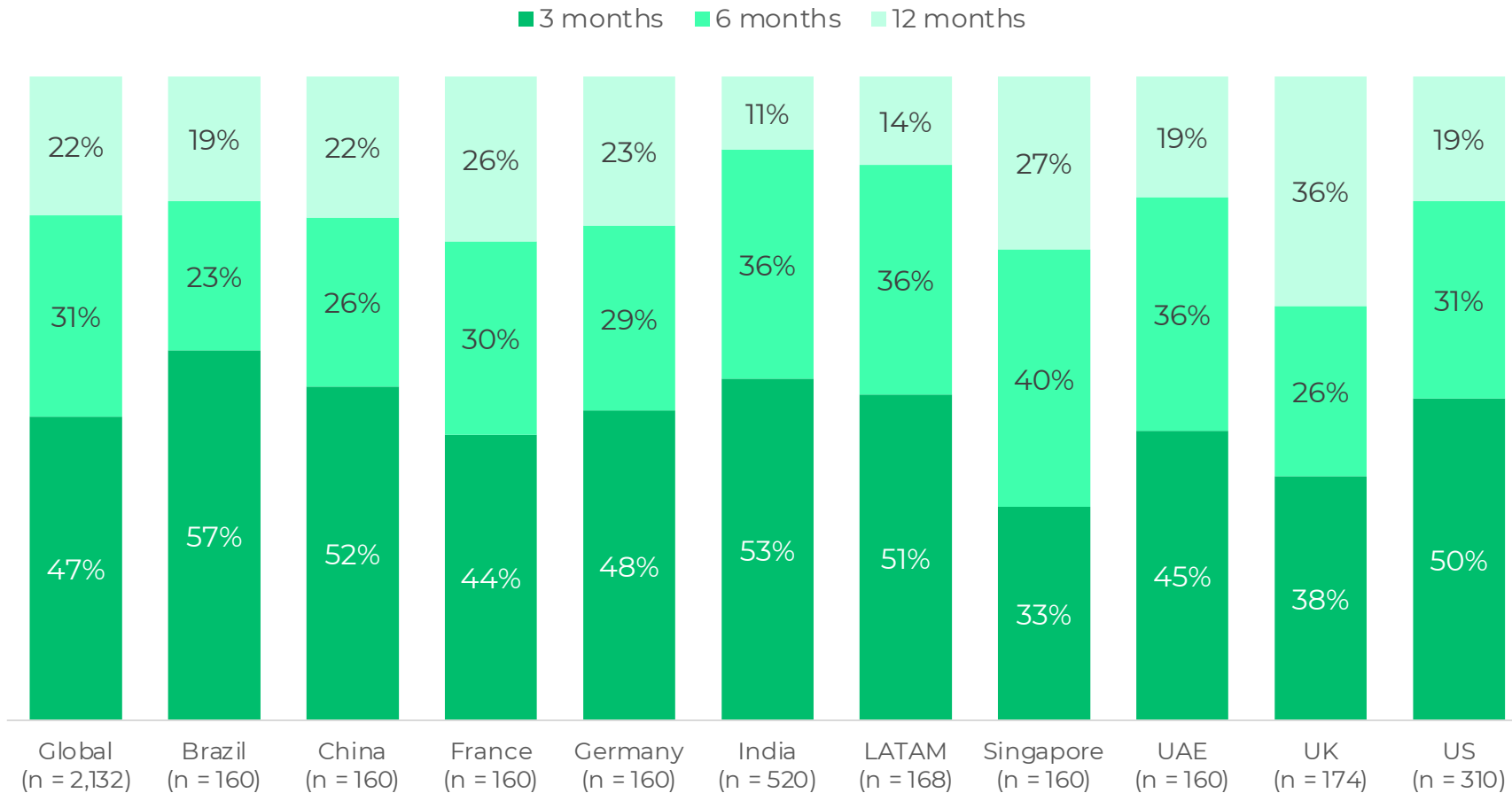
Personal spend with education is expected to increase

Personal spend with the following categories, in the next 6 months, will... | Wave #1 x Wave #2



47% intend to pursue further education in the next 3m

Interest in pursuing further education/professional training within the next...



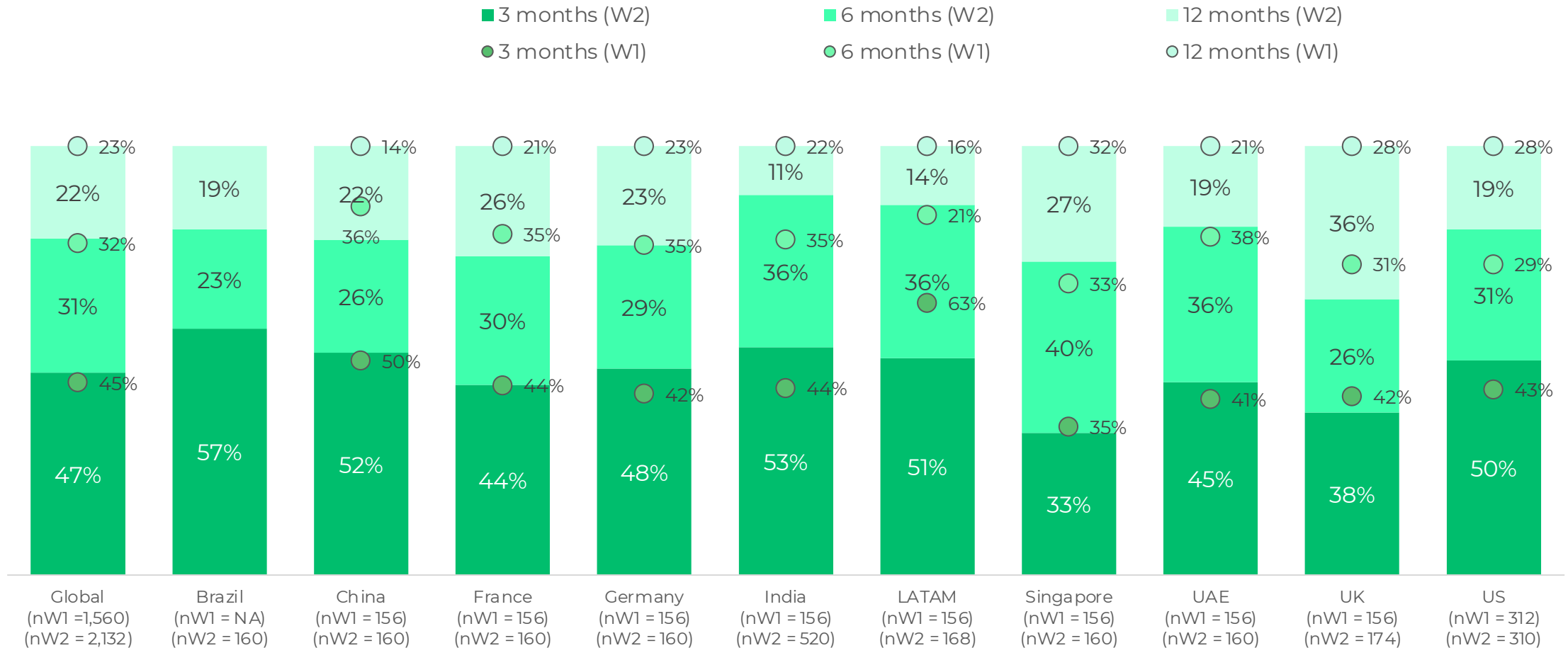
Respondents are looking to pursue further education in the short term.

Almost half of overall respondents has a 3-month timeframe in mind – this number is significantly higher in the Brazilian market: nearly two-thirds of respondents. Singaporean respondents are the ones with the longest timeframe in mind: a quarter will wait 12 months.



47% intend to pursue further education in the next 3m

Interest in pursuing further education/professional training within the next... | Wave #1 x Wave #2



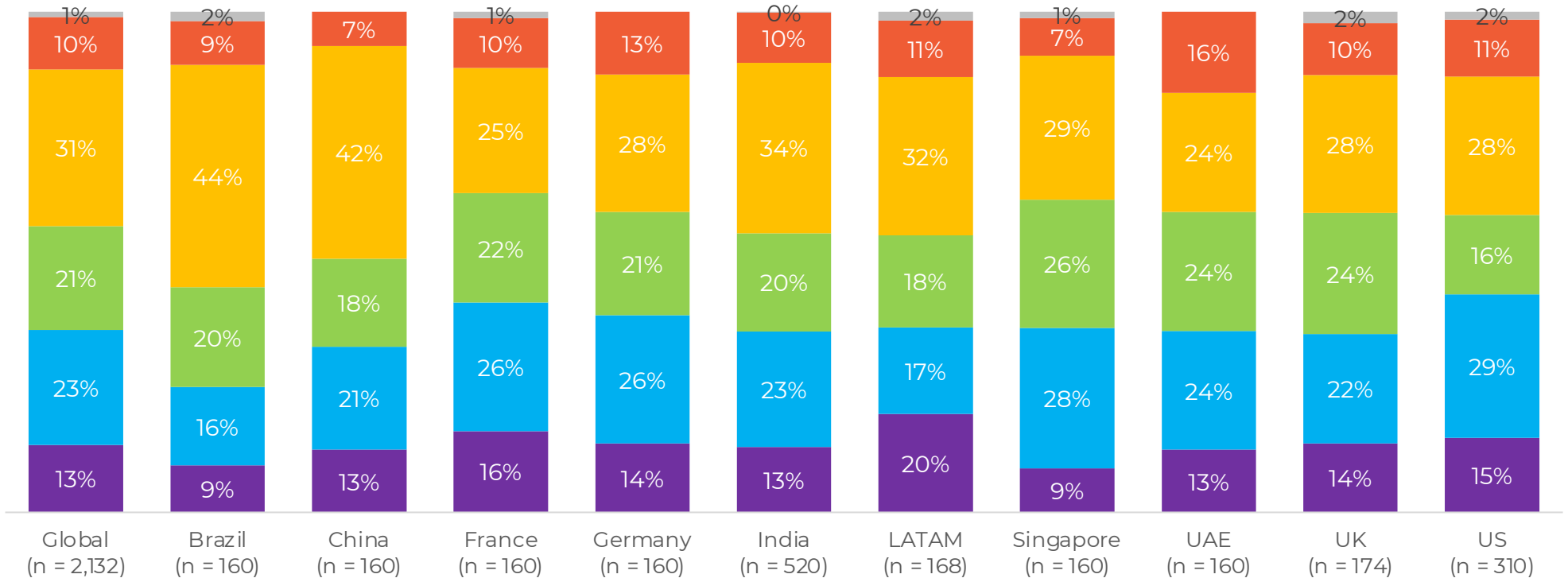
1/3 want to advance career in their current field

Current career moment

Overall, **a third of participants want to advance their career in their current field**; the percentage is even higher among respondents from Brazil (44%). Career builders and career switcher close the top 3 career moments.

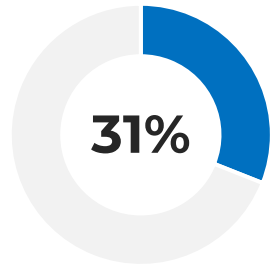
■ Career Launcher ■ Career Builder ■ Career Switcher ■ Career Advancer ■ Career Restarter ■ Other

Career Launcher	wanting to start a new career
Career Builder	ready to build upon existing skills (technical or non-technical)
Career Switcher	looking for new ways to expand opportunities
Career Advancer	advance career in your current field
Career Restarter	looking to re-enter the workforce after a break

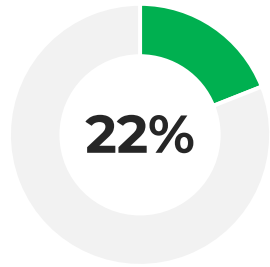


High interest in hybrid or fully online learning

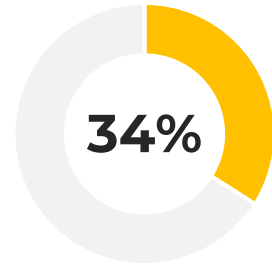
Considered approaches to obtain further education



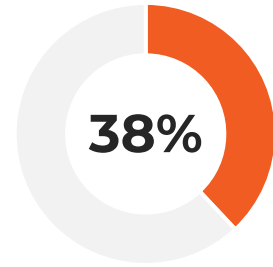
site-based, at nearby location



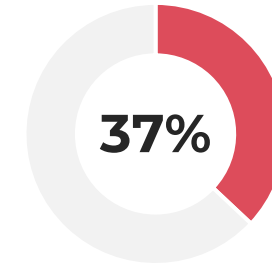
site-based, travel required



hybrid, mainly site-based



hybrid, mainly online

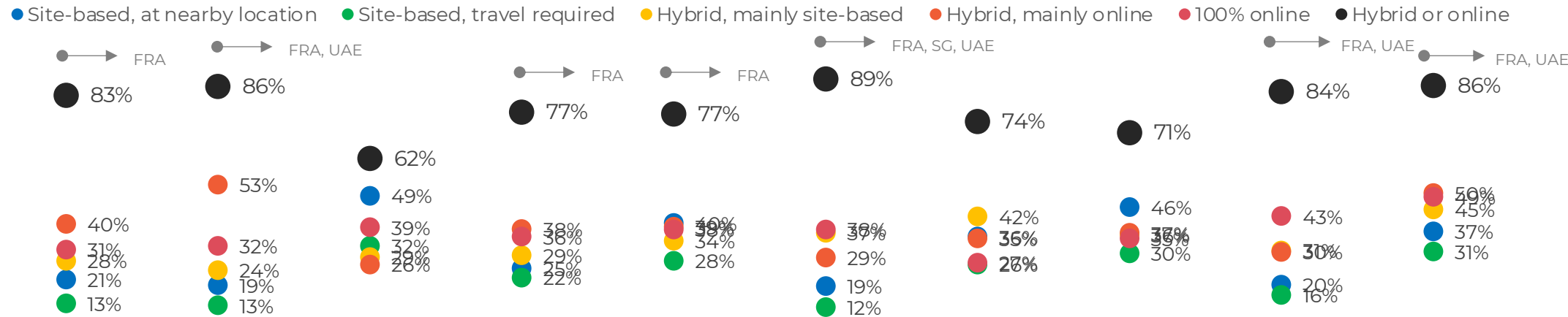


100% online

79%
would consider either a hybrid or online approach

Online learning consideration is high! Nearly 8 in every 10 respondents would consider either a hybrid or 100% online approach. Close to half of those who consider a F2F approach to learning also consider either a hybrid or fully online approach as well. A significant increase in interest is perceived among participants from France and UAE in comparison to the 2020 study.

Significant difference at 0.05 sig level



Global (n = 2,132)

Brazil (n = 160)

China (n = 160)

France (n = 160)

Germany (n = 160)

India (n = 520)

LATAM (n = 168)

Singapore (n = 160)

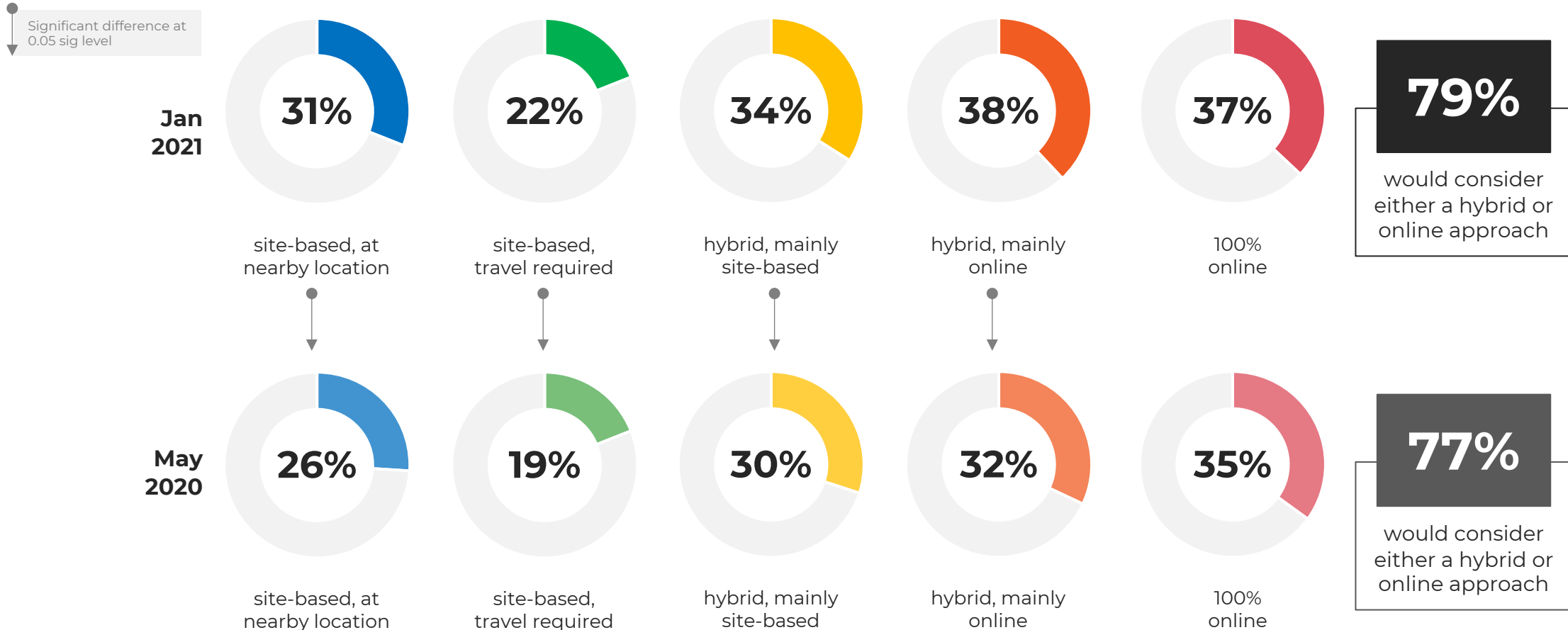
UAE (n = 160)

UK (n = 174)

US (n = 310)

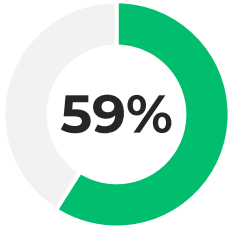
High interest in hybrid or fully online learning

Considered approaches to obtain further education | Wave #1 x Wave #2



Interest in pursuing further education is increasing!

How interest in pursuing further education has changed due to the current global developments

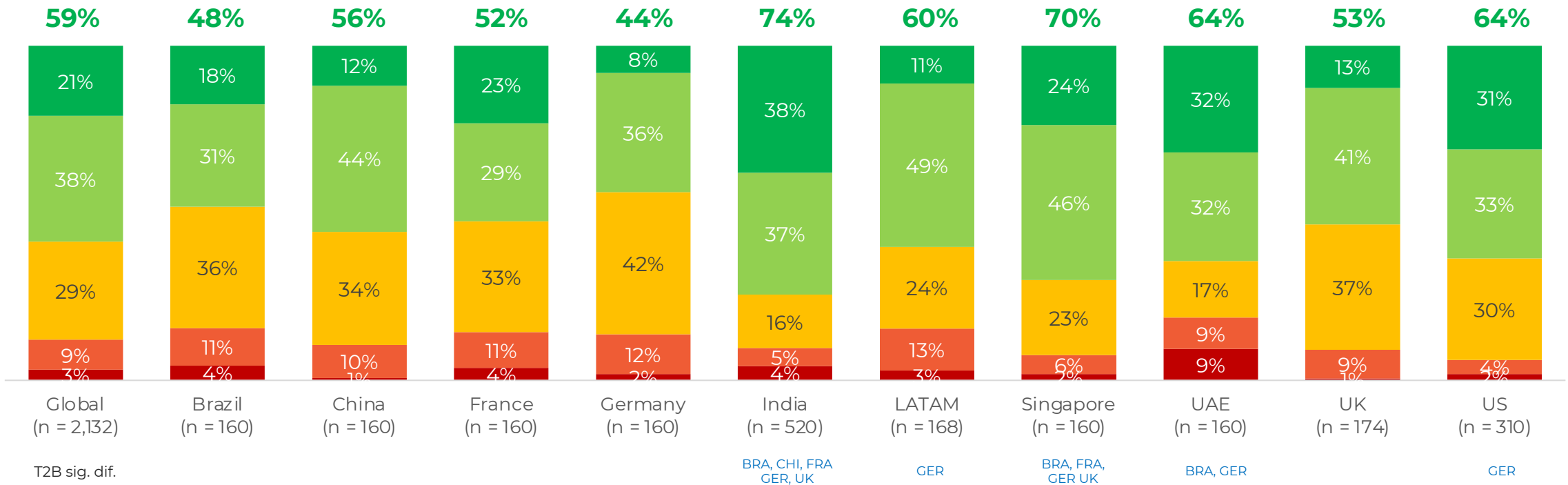


claim their interest in pursuing further education has **increased**

Interest in pursuing further education through online learning is increasing! Consistent with the findings from 2020, participants are looking for ways to 'future-proof' themselves and their careers, but the mentality has changed: even though several people still see further education as a safety measure to retain their jobs, we can see an increase in people who believe in education as a gateway to 'evolve' their career: promotions, salary increases, switch careers, etc.

■ Significantly decreased ■ Decreased ■ Stayed the same ■ Increased ■ Significantly increased

T2B¹
Top 2 Box



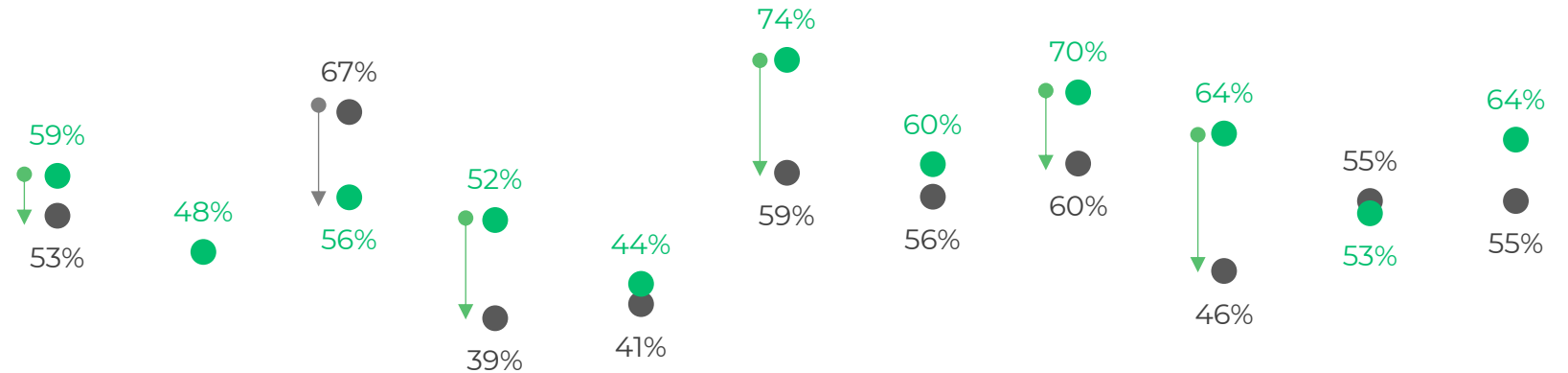
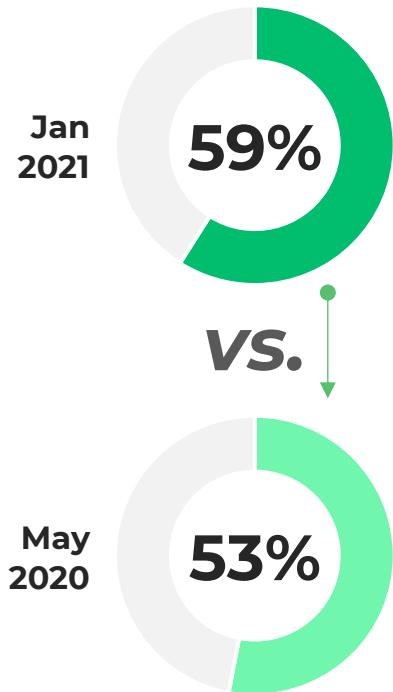
Interest in pursuing further education is increasing!

How interest in pursuing further education has changed due to the current global developments | **W1 x W2**

claim their interest in pursuing further education has **increased**
T2B (Top 2 Box) Results¹

● May 2020 (Wave #1) ● Jan 2021 (Wave #2)

Significant difference at 0.05 sig level



Region	Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
nW1	1,560	NA	156	156	156	156	156	156	156	156	312
nW2	2,132	160	160	160	160	520	168	160	160	174	310

To what extent would you say your interest in pursuing further education/professional learning has changed due to the current global developments? | ¹ T2B results: 4 or 5 in a 5-point scale.

Financial hindrances, safety, and no motivations

Why interest in pursuing further education has decreased for a small number of respondents



Covid 19 situation is directly **affected by my income** as well as family affairs with my **mind and a little bit physically**.
-- India

I am **confused about my current / future jobs**. I want to save maximum amount of money.
-- United Arab Emirates

Because of **unavailability of resources for online studying** makes me feel about decreasing towards professional learning.
-- India

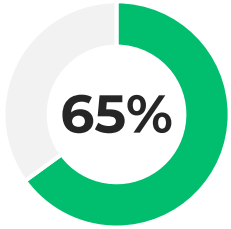
Because I want **learn more other skill** in business so that in **future** during any upcoming crisis, I will work online easily.
-- India

Lack of time. **Physical and intellectual exhaustion**.
-- Chile



Interest in online education is increasing!

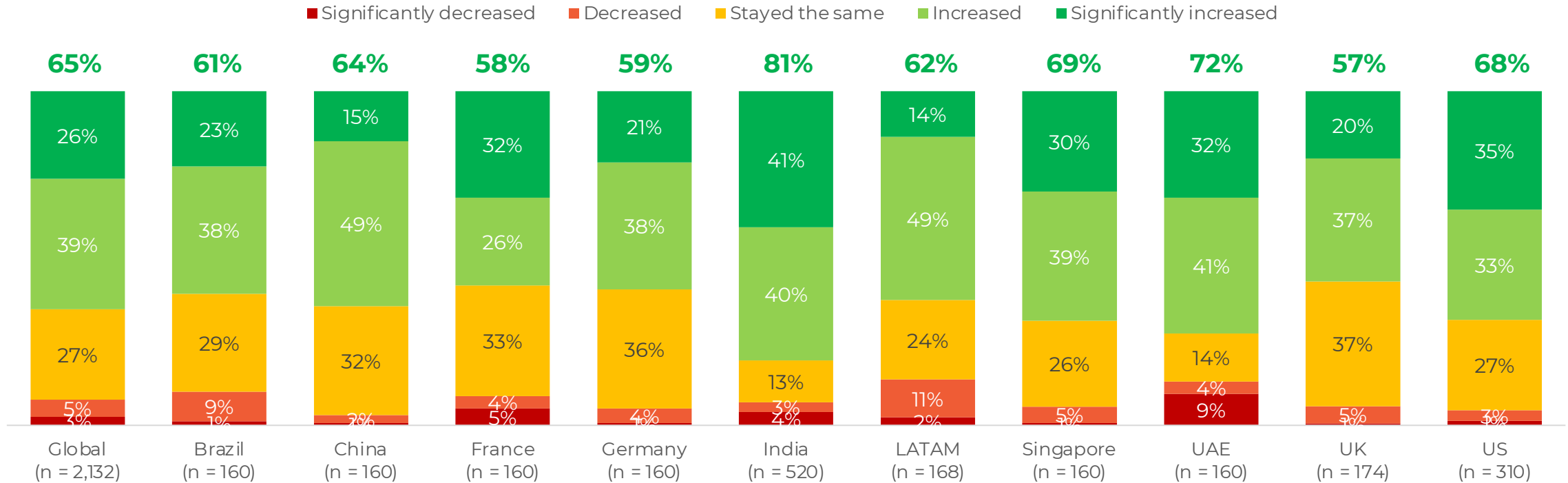
How interest in pursuing online education has changed due to the current global developments



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

Interest in pursuing further education through an online program is increasing! Participants feel like they are getting used to online learning and are seeing more and more benefits in it. Online learning is perceived as a convenient way to upskilling and acquire new skills. It also provides access to content and institutions that people would normally not have access to in F2F learning environments.

T2B¹
Top 2 Box



T2B sig. dif.

BRA, CHI, FRA
GER, LATAM, UK

UK

And to what extent would you say your interest in pursuing further education/professional learning through an online program has changed due to the current global developments?

¹ T2B results: 4 or 5 in a 5-point scale.

Difficulty to adapt and follow online learning

Why interest in pursuing online education has decreased for a small number of respondents



*The drawbacks of online education overpower the advantages. We tend to face many issues like **health issues** due to continuous sitting or less physical movement, eye strain due to long working hours or studying time.*

-- India

*There are other things that requires more focus such as finding ways to **improve financial situations**.*

-- United Arab Emirates

*I did not like how they are offered, and **I do not feel that I can absorb the information well**.*

-- Brazil

*In my current role, and made worse by the impact of the pandemic, **I feel I am becoming ever more tied to my laptop, something I am keen to break away from**.*

-- United Kingdom

*With covid we cannot work normally, **what would be the point of additional training if we lose our job?***

-- France

*Online teaching is **difficult to follow** some of the topics and also practicals; difficult to monitor the students and conduction of assignments, etc.*

-- India

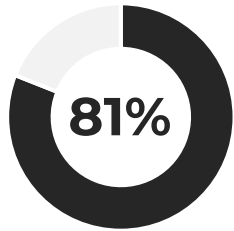




ONLINE EDUCATION PREFERENCES

Shorter formats are preferred over longer ones

Formats considered to obtain further education



of those who consider a free option also consider a paid format

Eight in ten of those who consider a free option would also consider a paid one. Shorter formats, with short term outcomes, are considered to a greater extent than longer formats.

	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Free self-guided learning	30%	31%	15%	31%	37%	27%	38%	34%	29%	30%	31%
Paid online mini courses	28%	29%	16%	27%	32%	28%	31%	31%	28%	22%	34%
Paid online short courses	26%	28%	26%	24%	20%	24%	27%	33%	31%	24%	27%
Free MOOCs	25%	18%	29%	18%	25%	29%	27%	33%	19%	29%	26%
Paid online MicroMasters	21%	28%	30%	18%	18%	25%	19%	20%	17%	9%	27%
Paid online MicroBachelors	21%	23%	32%	18%	16%	23%	17%	23%	19%	13%	26%
Paid online postgraduate diploma	21%	20%	28%	13%	14%	26%	20%	23%	23%	11%	30%
Paid MOOCs	21%	16%	31%	14%	16%	23%	16%	23%	21%	18%	28%
Paid online graduate, good 2nd tier university	19%	18%	29%	13%	13%	24%	14%	18%	18%	13%	29%
Paid online professional certificates	17%	15%	18%	15%	8%	23%	12%	16%	17%	14%	27%
Paid online graduate, top, global university	16%	17%	28%	8%	4%	25%	16%	16%	12%	13%	25%
Paid online UG, good 2nd tier university	15%	16%	23%	13%	6%	20%	11%	13%	17%	8%	27%
Paid online UG, top, global university	15%	11%	26%	15%	5%	19%	15%	16%	13%	10%	24%
Paid online bootcamps	11%	4%	16%	14%	4%	18%	6%	12%	9%	7%	17%
Other	2%	3%	0%	4%	1%	0%	2%	0%	0%	4%	1%

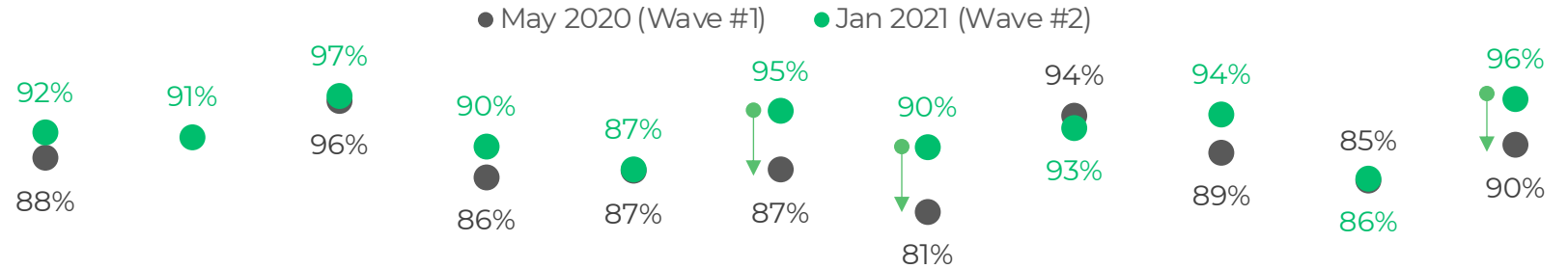
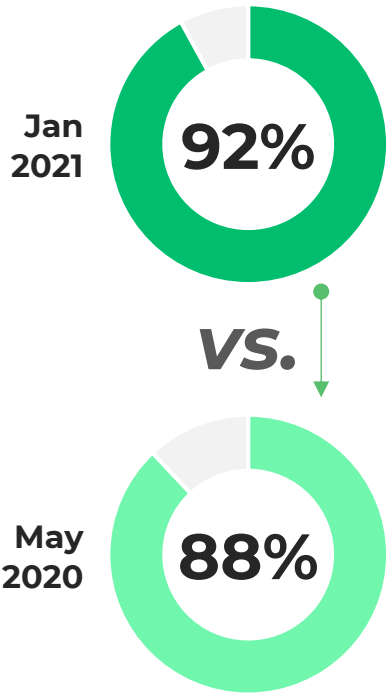


92% consider a paid option to pursue further education

Formats considered to obtain further education | Wave #1 x Wave #2

Significant difference at 0.05 sig level

consider a **paid option** to pursue further education



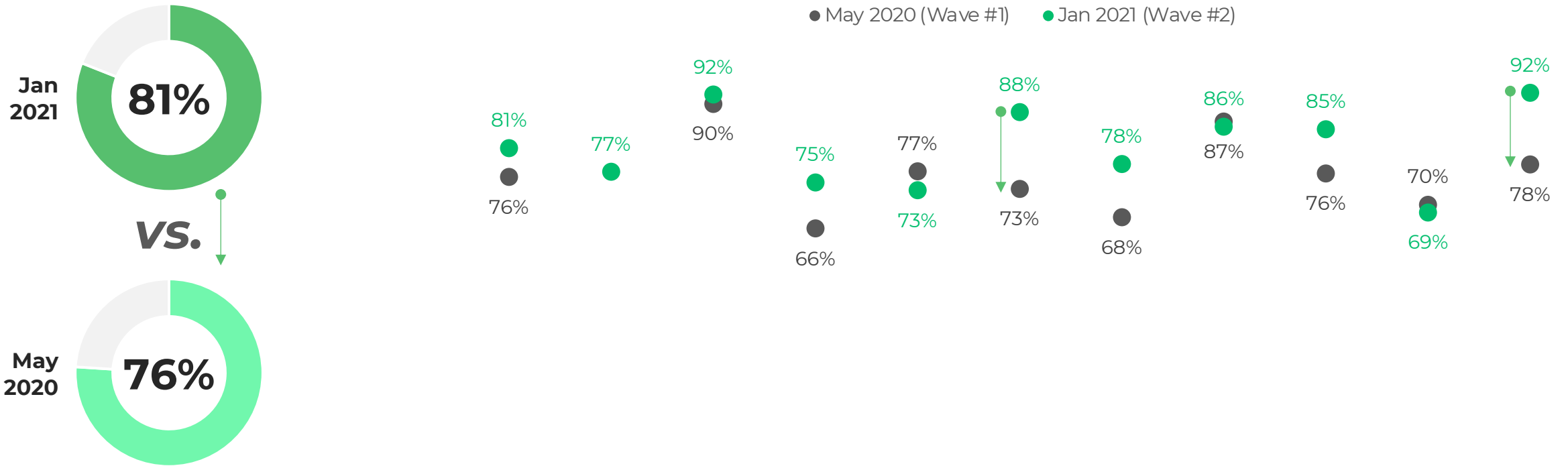
Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
(nW1 = 1,560)	(nW1 = NA)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 312)
(nW2 = 2,132)	(nW2 = 160)	(nW2 = 160)	(nW2 = 160)	(nW2 = 160)	(nW2 = 520)	(nW2 = 168)	(nW2 = 160)	(nW2 = 160)	(nW2 = 174)	(nW2 = 310)



High consideration of paid learning formats

Formats considered to obtain further education | Wave #1 x Wave #2

Significant difference at 0.05 sig level



of those who consider a **free option also consider a paid format**

Region	Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
(nW1)	1,560	NA	156	156	156	156	156	156	156	156	312
(nW2)	2,132	160	160	160	160	520	168	160	160	174	310



Education providers/formats - specs

Formats considered to obtain further education

Free self-guided learning

(e.g., YouTube tutorials, forums, etc.) – broad range of topics

Free MOOCs, Massive Online Open Courses

(through Coursera, edX, FutureLearn, etc.; typically 1-2 months) – broad range of topics

Paid online mini courses

(typically 10-20 hours; US\$ 300 - US\$ 900 cost) – skill-based topics

Paid MOOCs, Massive Online Open Courses

(through Coursera, edX, FutureLearn, etc.; typically 1-2 months; up to US\$ 1K cost) – broad range of topics

Paid online short courses

(typically 2 months; US\$ 1K - US\$ 5K cost) - skill-based topics

Paid online bootcamps

(typically 6 months; US\$ 10K - US\$ 20K cost) - skill-based topics

Paid online professional certificates

(typically 9 months; US\$ 20K - US\$ 50K cost) - skill-based topics

Paid online MicroBachelors

(typically 4-12 months; US\$ 500 - US\$ 1,5K) – 4 to 8 entry-level undergraduate courses dedicated to a particular topic, credits can count towards a full undergraduate degree

Paid online MicroMasters

(typically 6-12 months; US\$ 500 – US\$ 1,5K) – 4 to 8 courses of a graduate-level program, credits can count towards a full graduate degree

Paid online undergraduate (Associate, Bachelor's, etc.) degrees with a top, global university

(typically 24-48 months; US\$ 20K - US\$ 100K cost)

Paid online undergraduate (Associate, Bachelor's, etc.) degrees with good second tier university

(typically 24-48 months; US\$ 8K - US\$ 15K cost)

Paid online postgraduate diploma

(typically 4-6 months; US\$ 5k – US\$ 7k) – a postgraduate qualification awarded after an undergraduate degree which supplements the original degree (shorter than a master's degree, but at the same academic level)

Paid online graduate (Master's, Doctoral/PhD, etc.) degrees with a top, global university

(typically 12-36 months; US\$ 20K - US\$ 200K cost)

Paid online graduate (Master's, Doctoral/PhD, etc.) degrees with a good second tier university

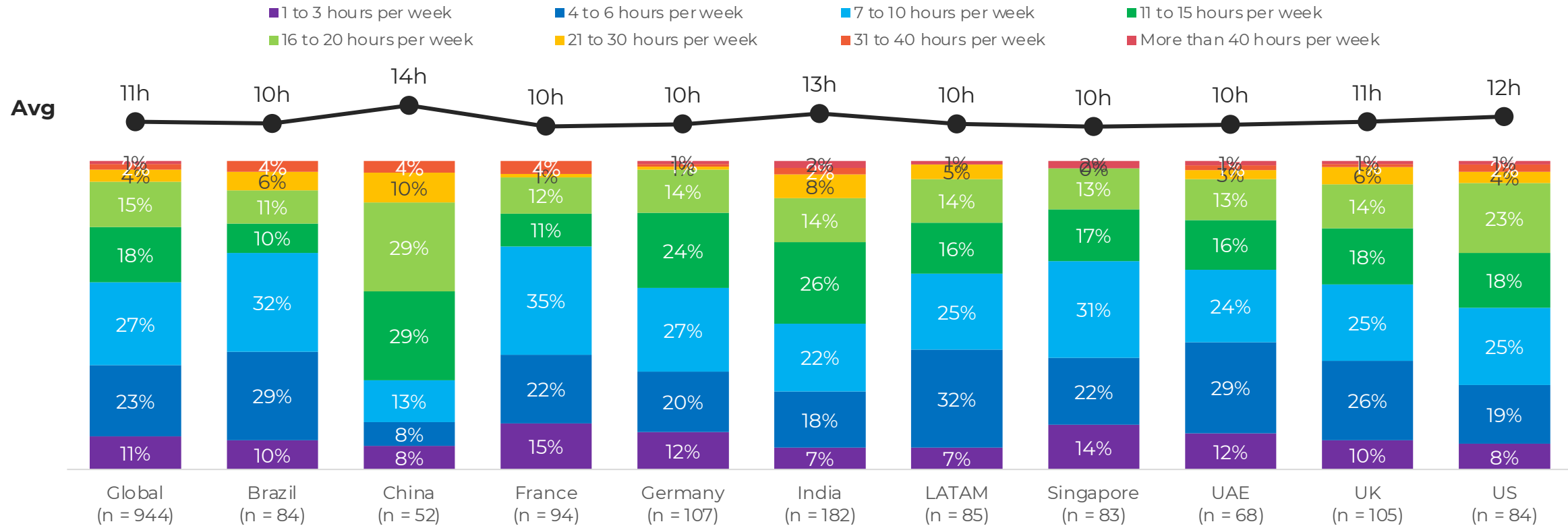
(typically 12-36 months; US\$ 8K - US\$ 15K cost)



On average, they are willing to dedicate 11h/week to education

Weekly hours willing to dedicate to education (only those who do not consider a degree)

Overall, participants are willing to dedicate **11 hours per week** to furthering their education or professional learning. China's average is 14h, the highest across markets, followed by India (13h), and US (12h). Singapore has the lowest average, at 9.6h.



T2B sig. dif.

BRA, FRA, GER,
LATAM, SG,
UAE, UK

How many hours per week would you say you would be willing to dedicate to furthering your education/professional learning, including watching lectures and assignments (filter: only those who do not consider a graduate, postgraduate, or undergraduate format).

Live sessions are preferred over recorded content

Live x recorded online learning preference (ranking)

RANK >	#1	#2	#3	#4
Global (n = 2,132)	Mostly live (2.14)	100% live (2.16)	Mostly recorded (2.49)	100% recorded (3.20)
Brazil (n = 160)	Mostly live (2.04)	Mostly recorded (2.26)	100% live (2.57)	100% recorded (3.13)
China (n = 160)	100% live (1.90)	Mostly live (2.39)	Mostly recorded (2.57)	100% recorded (3.14)
France (n = 160)	Mostly live (2.11)	100% live (2.20)	Mostly recorded (2.51)	100% recorded (3.18)
Germany (n = 160)	Mostly live (1.94)	100% live (2.39)	Mostly recorded (2.40)	100% recorded (3.28)
India (n = 520)	100% live (1.77)	Mostly live (2.25)	Mostly recorded (2.72)	100% recorded (3.26)
LATAM (n = 168)	100% live (1.91)	Mostly live (2.07)	Mostly recorded (2.64)	100% recorded (3.39)
Singapore (n = 160)	Mostly live (1.94)	100% live (2.23)	Mostly recorded (2.50)	100% recorded (3.33)
UAE (n = 160)	100% live (1.88)	Mostly live (2.25)	Mostly recorded (2.60)	100% recorded (3.27)
UK (n = 174)	Mostly live (2.19)	Mostly recorded (2.37)	100% live (2.39)	100% recorded (3.05)
US (n = 310)	Mostly live (2.24)	100% live (2.35)	Mostly recorded (2.37)	100% recorded (3.04)

Overall, live sessions (either 100% live or mostly live) are preferred over recorded content. 100% recorded content is clearly the least preferred option, but a combination of live and recorded, mostly recorded content, ranks #2 in Brazil and the UK.

#rank
average¹

Global
(n = 2,132)

#1
2.14

A combination of live and recorded sessions, **mostly live sessions**

#2
2.16

100% live sessions

#3
2.49

A combination of live and recorded sessions, **mostly recorded sessions**

#4
3.20

100% recorded sessions



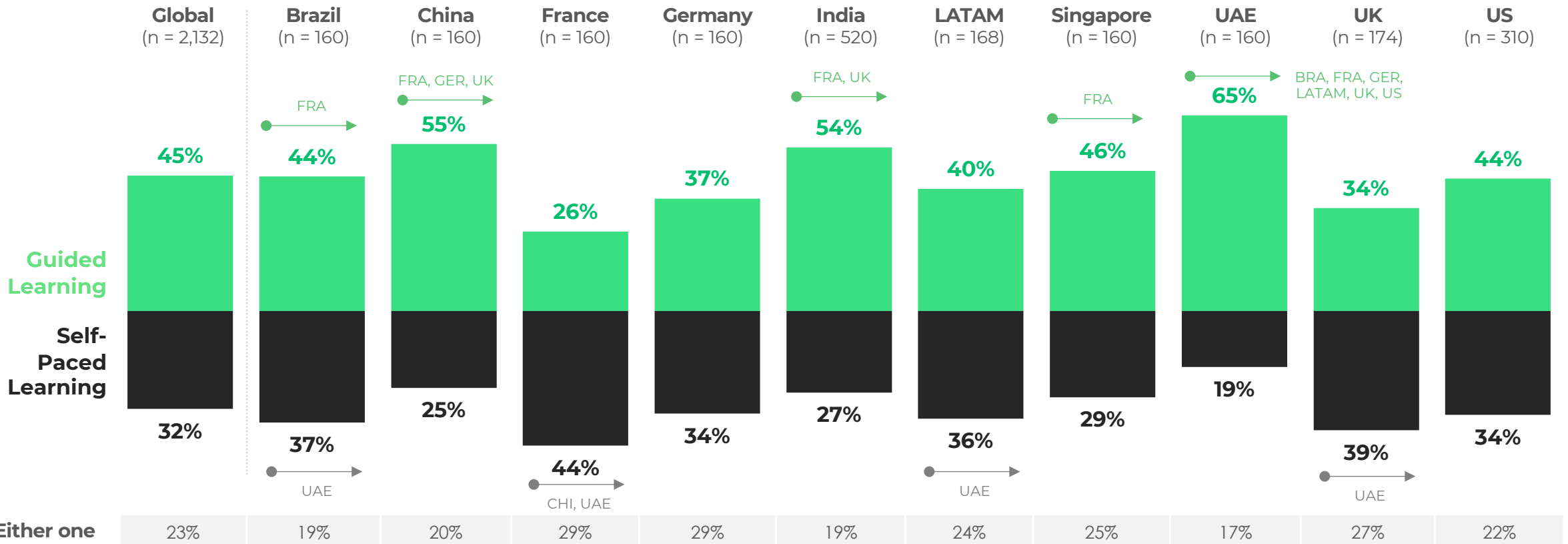
What would you say is your preferred approach to how online classes are delivered? Please rank the following delivery options from your MOST PREFERRED (1) to your LEAST PREFERRED (4). Keep in mind that all sessions are online/virtual. (ranking). | ¹Options were ranked based on the average position score weighted by the frequency of choice of each alternative in each position (the lower the score, the higher they are ranked).

Guided learning is preferred over self-paced learning

Preferred learning pace

Significant difference at 0.05 sig level

Overall, **guided learning is preferred over self-paced learning**, especially among participants from the UAE and China, but France and UK are exceptions.



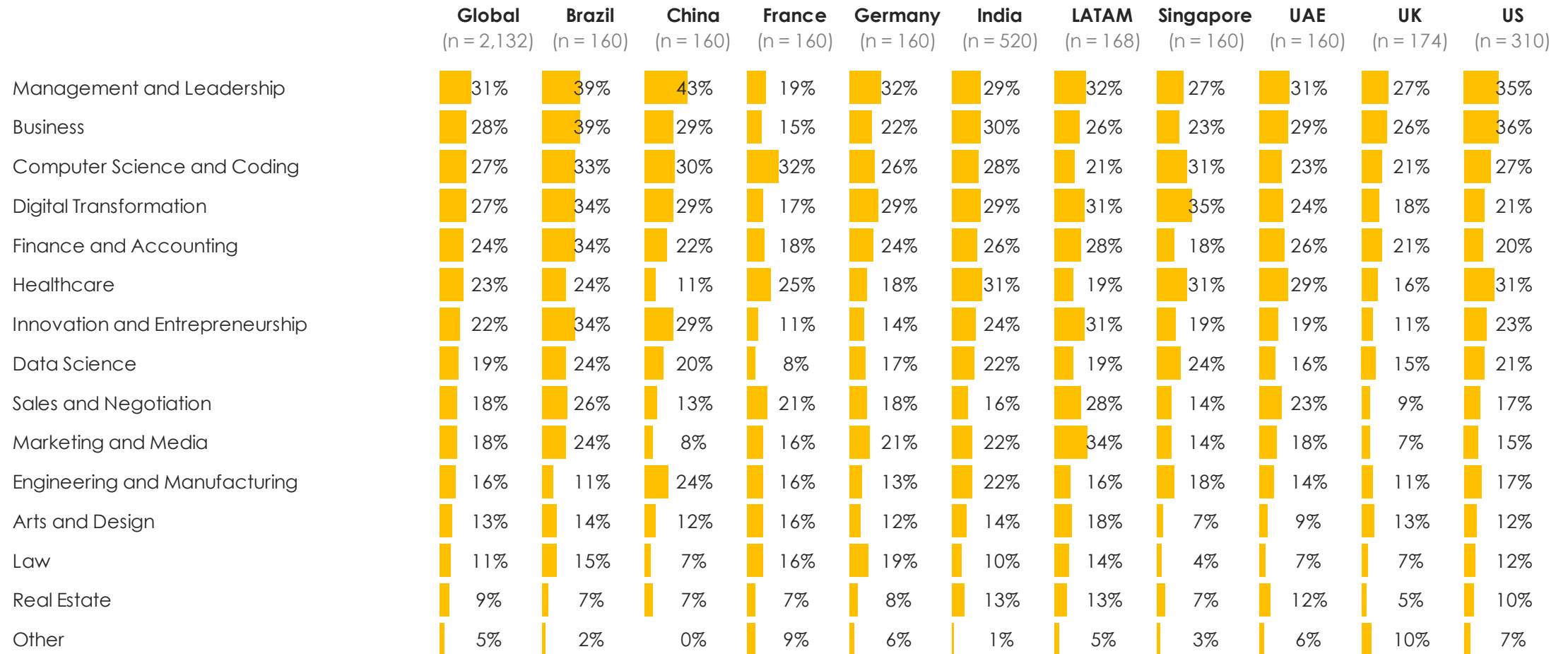
Self-paced learning: all the content is released upfront, and you can complete it at your own pace until an estimated deadline.

Guided learning: content is released periodically in modules and you have to complete each module before you move to the next one.



Different markets prioritize different subjects or topics

Subjects or topics that are priorities for learning and development



What subjects or topics are priorities for your learning and development? Please select all that apply. (multiple-choice)

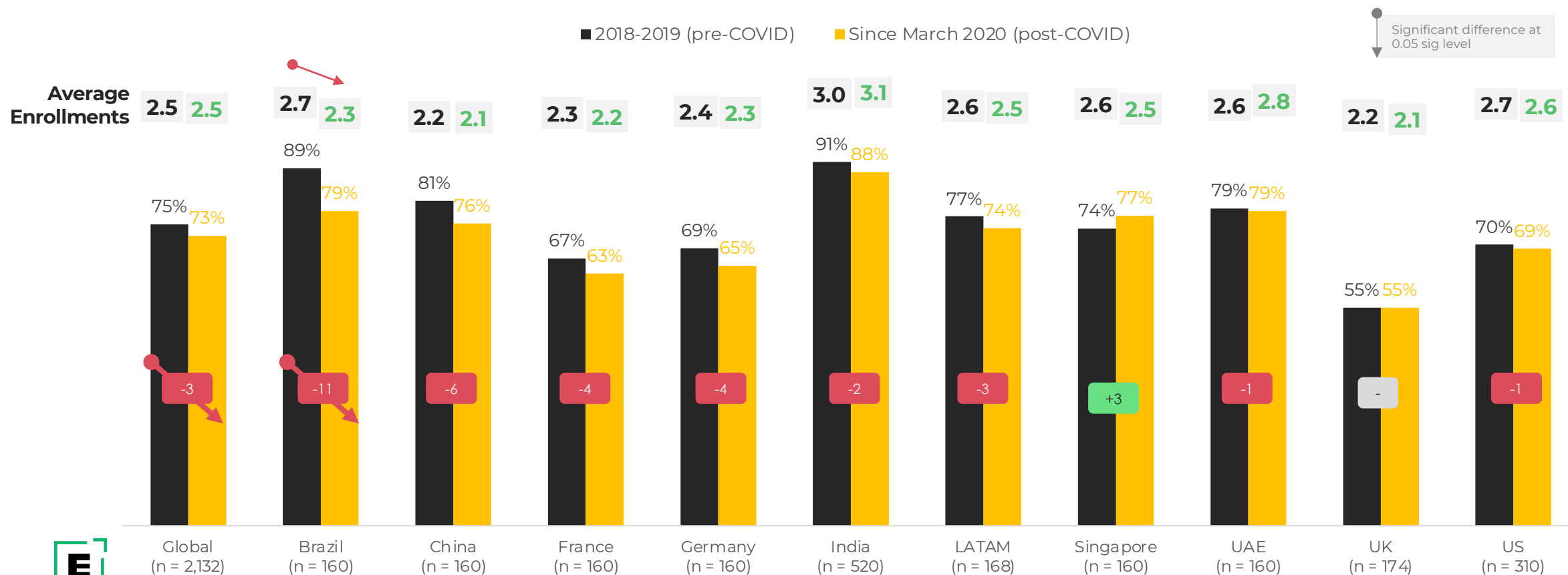


ONLINE EDUCATION PRE X POST-COVID

Pace of online enrollments pre and post-covid did not change

Online enrollments 2018-2019 x since March 2020

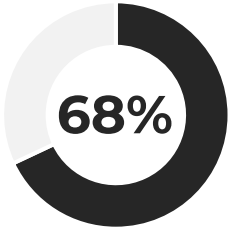
Overall, pace of enrollments in online programs since March 2020 (post-COVID) did not change significantly in comparison to enrollments between 2018 and 2019 (pre-COVID). Brazil is the exception, with a 11 p.p. decrease.



¹ How many online programs did you attend/enroll in between 2018 and 2019? | ² How many online programs have you attended/enrolled in since March 2020?

Free formats were the most popular post-COVID

Online program format enrolled since March 2020



of those who enrolled in a free option also enrolled in a paid format

Two-thirds of those who enrolled in a free option also enrolled in a paid format. Shorter formats, with short term outcomes, received more enrollments than longer formats

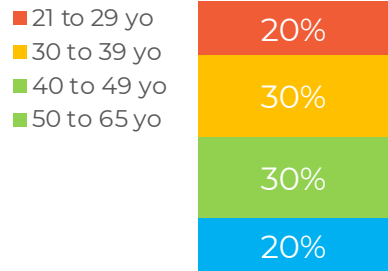
	Global (n = 1,597)	Brazil (n = 126)	China (n = 121)	France (n = 101)	Germany (n = 104)	India (n = 460)	LATAM (n = 125)	Singapore (n = 124)	UAE (n = 126)	UK (n = 95)	US (n = 215)
Free self-guided learning	28%	39%	19%	21%	34%	27%	34%	27%	28%	26%	27%
Free MOOCs	27%	29%	12%	27%	29%	26%	27%	31%	29%	26%	32%
Paid online mini courses	23%	25%	20%	24%	28%	23%	21%	22%	18%	23%	25%
Paid online short courses	21%	22%	26%	34%	13%	20%	22%	19%	14%	11%	26%
Paid online postgraduate diploma	18%	12%	17%	22%	18%	22%	20%	17%	17%	7%	25%
Paid MOOCs	17%	7%	15%	20%	19%	24%	13%	16%	20%	8%	29%
Paid online MicroBachelors	17%	11%	18%	23%	17%	20%	11%	16%	17%	3%	28%
Paid online professional certificates	15%	6%	15%	18%	10%	18%	18%	11%	18%	5%	32%
Paid online MicroMasters	15%	10%	16%	13%	12%	19%	11%	15%	21%	4%	25%
Paid online UG, top, global university	14%	6%	13%	13%	13%	16%	13%	11%	19%	6%	22%
Paid online graduate, top, global university	13%	6%	14%	14%	7%	19%	10%	15%	13%	7%	24%
Paid online UG, good 2nd tier university	13%	6%	15%	14%	8%	20%	12%	12%	10%	9%	22%
Paid online graduate, good 2nd tier university	13%	7%	13%	14%	10%	20%	10%	11%	10%	7%	23%
Paid online bootcamps	11%	3%	17%	13%	2%	17%	13%	8%	12%	3%	18%
Other	2%	5%	0%	2%	2%	0%	5%	2%	1%	2%	0%





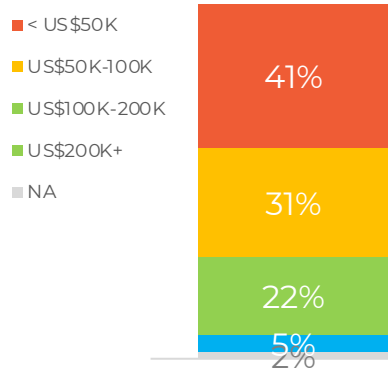
RESPONDENT PROFILE

Respondent profile



Global
(n = 2,132)

AGE ¹	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
21 to 29 yo	20%	20%	20%	20%	20%	20%	19%	20%	20%	20%	20%
30 to 39 yo	30%	30%	30%	30%	30%	30%	29%	30%	30%	32%	31%
40 to 49 yo	30%	30%	30%	30%	30%	30%	32%	30%	30%	28%	31%
50 to 65 yo	20%	20%	20%	20%	20%	20%	21%	20%	20%	20%	18%
Average	39 yo	39 yo	39 yo	39 yo	39 yo	40 yo	39 yo	40 yo	38 yo	39 yo	39 yo



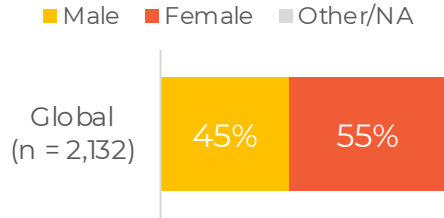
Global
(n = 2,132)

INCOME ²	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
< US\$ 10K	10%	22%	4%	5%	7%	12%	20%	7%	13%	7%	2%
US\$ 10K-25K	13%	19%	6%	13%	14%	12%	23%	10%	11%	18%	6%
US\$ 25K-50K	17%	21%	10%	31%	23%	11%	12%	15%	12%	29%	11%
US\$ 50K-75K	16%	16%	11%	19%	29%	10%	11%	23%	10%	17%	11%
US\$ 75K-100K	15%	7%	9%	21%	13%	22%	12%	22%	9%	14%	19%
US\$ 100K-125K	8%	2%	10%	2%	2%	13%	2%	6%	24%	3%	12%
US\$ 125K-150K	5%	3%	13%	4%	4%	4%	4%	4%	5%	3%	9%
US\$ 150K-175K	6%	3%	17%	2%	2%	5%	5%	9%	5%	2%	9%
US\$ 175K-200K	3%	1%	10%	0%	1%	6%	1%	1%	1%	2%	9%
US\$ 200K-250K	2%	1%	8%	1%	0%	3%	4%	1%	4%	1%	3%
US\$ 250K-300K	1%	1%	1%	0%	0%	1%	2%	1%	1%	0%	5%
US\$ 300K+	1%	1%	2%	1%	2%	0%	2%	2%	2%	0%	2%
Prefer not to say	2%	1%	0%	3%	2%	1%	2%	0%	4%	3%	1%
Average (US\$)	78K	53K	122K	60K	62K	81K	65K	79K	86K	57K	115K

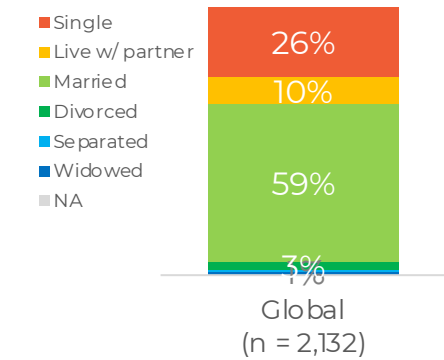


¹ How old are you? | ² Which one of the following categories best describes your gross annual personal income (before deductions and taxes)? Please estimate a value in US dollars (US\$).

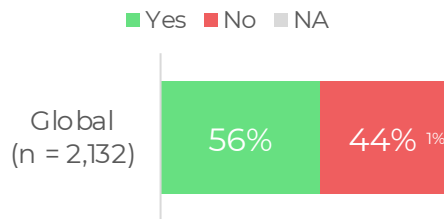
Respondent profile



GENDER ¹	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Female	55%	49%	54%	62%	60%	46%	48%	69%	58%	51%	51%
Male	45%	51%	46%	37%	40%	54%	52%	31%	42%	49%	49%
Other/NA	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%



MARITAL STATUS ²	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Single	26%	26%	20%	19%	29%	21%	29%	29%	27%	31%	28%
Live w/ partner	10%	13%	1%	14%	18%	2%	15%	4%	3%	24%	5%
Married	59%	51%	77%	61%	46%	74%	45%	63%	69%	41%	62%
Divorced	3%	7%	1%	4%	5%	1%	4%	3%	1%	3%	4%
Separated	1%	1%	0%	1%	0%	1%	4%	0%	1%	1%	1%
Widowed	1%	1%	0%	0%	2%	1%	2%	1%	0%	1%	1%
Prefer not to say	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%

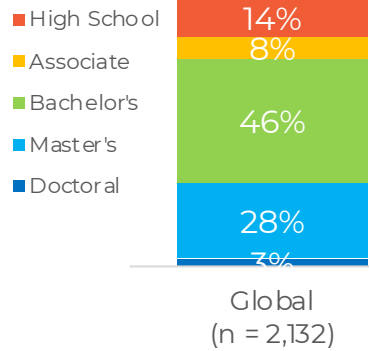


CHILDREN ³	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Yes	56%	61%	41%	65%	34%	59%	60%	54%	74%	49%	62%
No	44%	39%	59%	33%	66%	41%	39%	44%	26%	51%	38%
Prefer not to say	1%	1%	0%	2%	0%	0%	1%	1%	1%	0%	0%

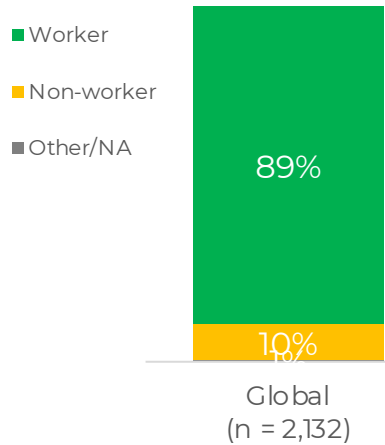


¹ Which gender do you identify with? | ² Which of the following best describes your marital status? | ³ Do you have any children 18 or younger living in your household?

Respondent profile



EDUCATION LEVEL ¹	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
High School	14%	20%	11%	7%	21%	11%	15%	15%	11%	17%	14%
Associate	8%	5%	9%	13%	4%	9%	11%	5%	9%	9%	6%
Bachelor's	46%	48%	66%	53%	42%	36%	46%	46%	32%	45%	49%
Master's	28%	20%	14%	23%	30%	42%	24%	34%	44%	22%	29%
Doctoral	3%	7%	1%	4%	3%	2%	4%	0%	3%	6%	2%



EMPLOYMENT STATUS ²	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Employed full time	70%	51%	91%	72%	68%	65%	51%	86%	82%	66%	72%
Employed part-time	10%	15%	2%	7%	11%	15%	12%	6%	7%	16%	8%
Self-employed/freelance	6%	18%	4%	4%	5%	8%	10%	2%	4%	3%	2%
Entrepreneur/business owner	3%	7%	1%	4%	2%	3%	9%	2%	1%	1%	2%
Not employed, looking for work	3%	4%	1%	3%	5%	1%	9%	1%	2%	4%	5%
Not employed, not looking for work	1%	0%	0%	1%	0%	0%	2%	0%	1%	1%	1%
Retired	1%	3%	0%	2%	2%	1%	1%	1%	0%	1%	1%
Student	3%	1%	2%	6%	5%	4%	1%	1%	3%	4%	6%
Other/NA	1%	1%	0%	0%	1%	1%	4%	1%	0%	3%	3%



¹ What is your highest level of education? | ² Which of the following best describes your current employment status?

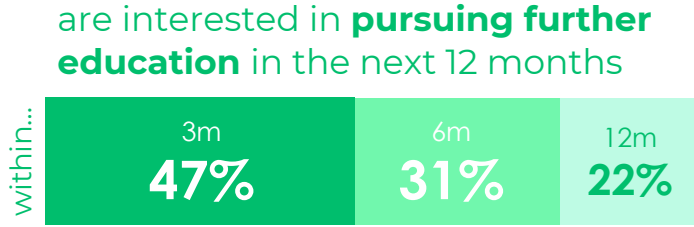


MARKET SUMMARIES

Global Consumer Sentiment | Global

Learning about the future of online education | Wave #2

2,132
RESPONDENTS



81% out of those who consider a free option also consider a paid option

Top 5 Formats

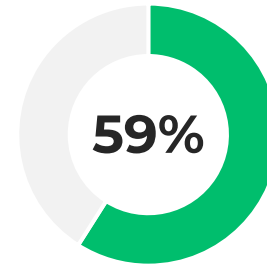
preferred program formats

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

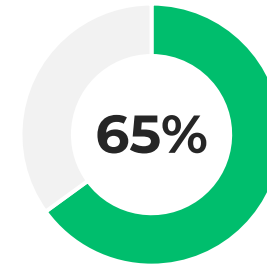


believe **online learning adoption will increase** in the near future

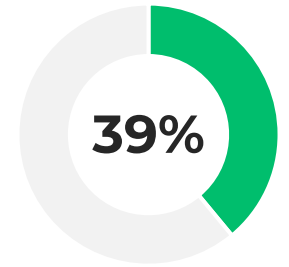
due to the current global developments...



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

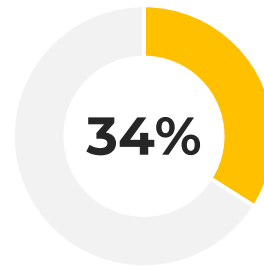


claim their interest in pursuing **online education** has increased

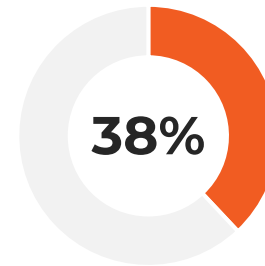


expect their **personal spend with education** to increase in the next 6 months

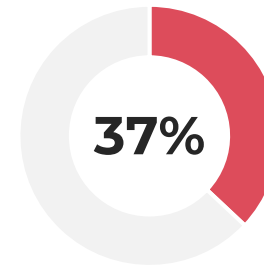
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

79%

would consider either a hybrid or online approach

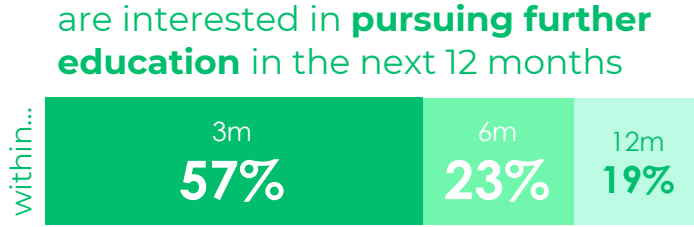


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | Brazil

Learning about the future of online education | Wave #2

160
RESPONDENTS

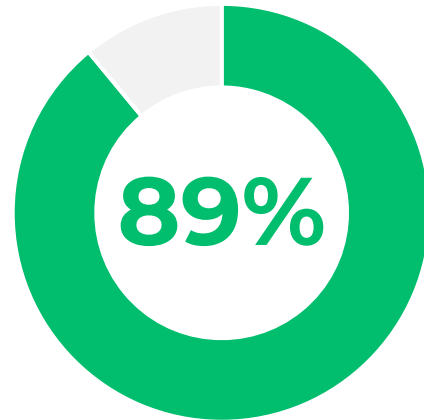


77% out of those who consider a free option also consider a paid option

Top 5 Formats

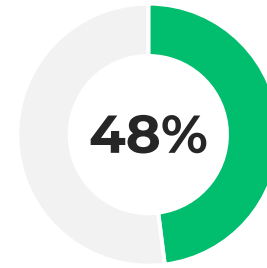
preferred program formats

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

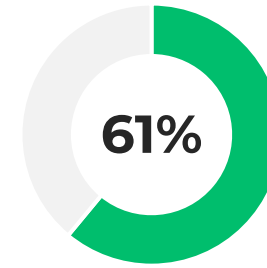


believe **online learning adoption will increase** in the near future

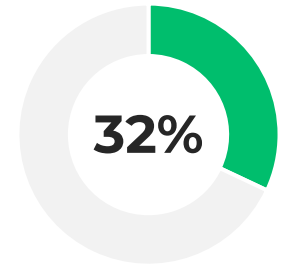
due to the current global developments...



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

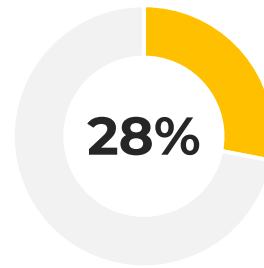


claim their interest in pursuing **online education** has **increased**

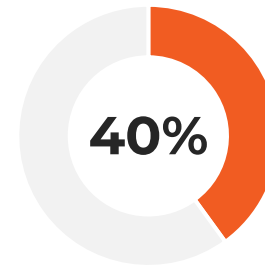


expect their **personal spend with education to increase** in the next 6 months

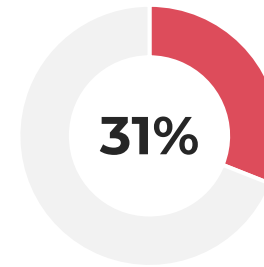
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

83%

would consider either a hybrid or online approach

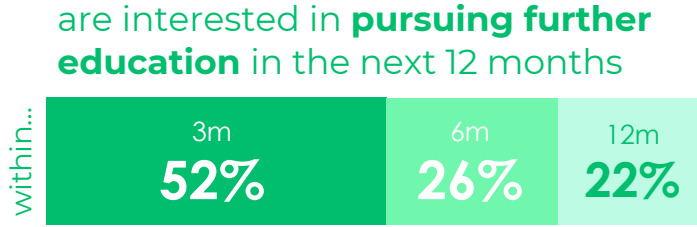


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | China

Learning about the future of online education | Wave #2

160
RESPONDENTS

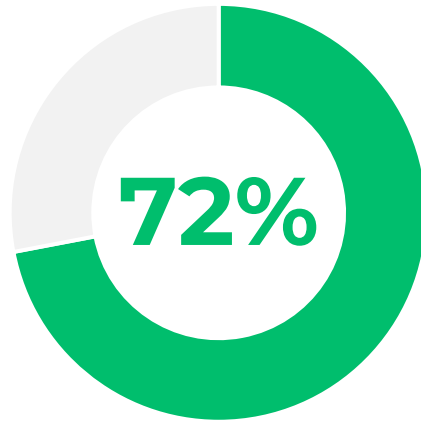


92% out of those who consider a free option also consider a paid option

Top 5 Formats

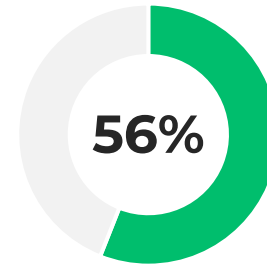
preferred program formats

- #1 Paid online MicroBachelors
- #2 Paid MOOCs
- #3 Paid online MicroMasters
- #4 Paid online graduate, good 2nd tier university
- #5 Free MOOCs

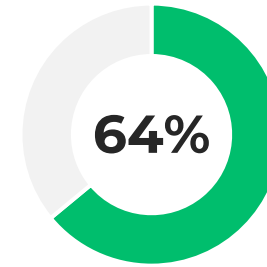


believe **online learning adoption will increase** in the near future

due to the current global developments...



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

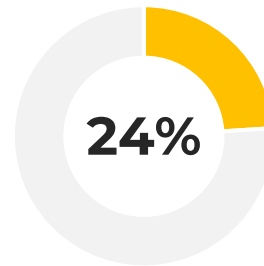


claim their interest in pursuing **online education** has increased

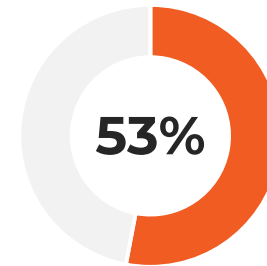


expect their **personal spend with education to increase** in the next 6 months

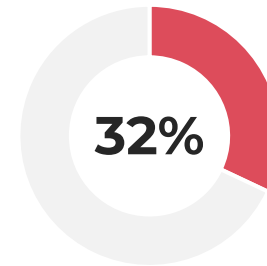
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

86%

would consider either a hybrid or online approach

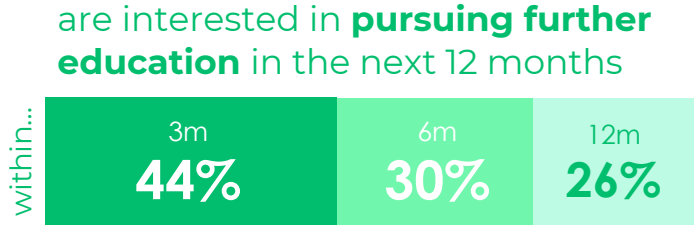


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | France

Learning about the future of online education | Wave #2

160
RESPONDENTS

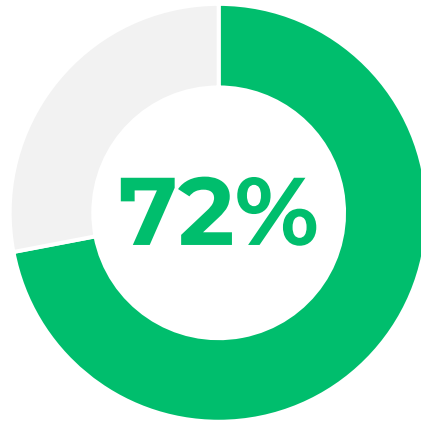


75% out of those who consider a free option also consider a paid option

Top 5 Formats

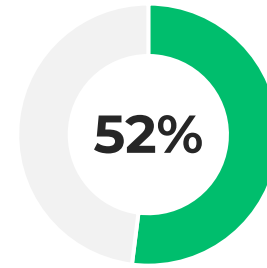
preferred program formats

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

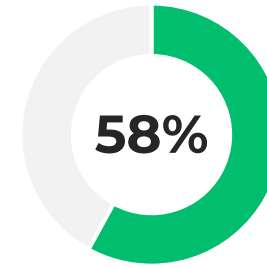


believe **online learning adoption will increase** in the near future

due to the current global developments...



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

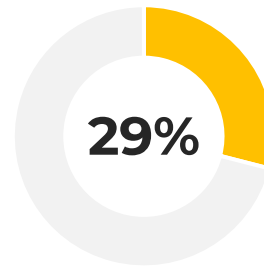


claim their interest in pursuing **online education** has increased

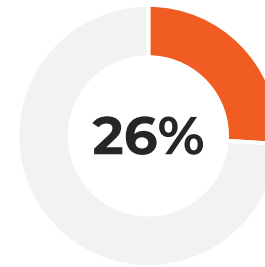


expect their **personal spend with education to increase** in the next 6 months

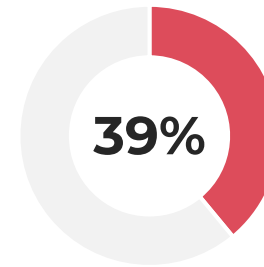
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

62%

would consider either a hybrid or online approach

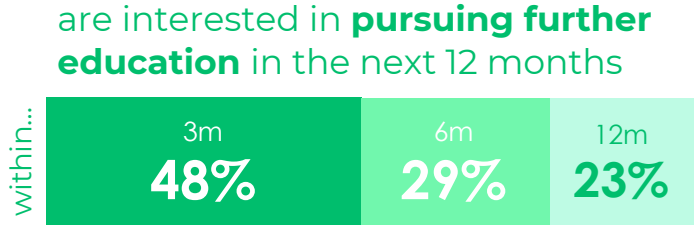


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | Germany

Learning about the future of online education | Wave #2

160
RESPONDENTS

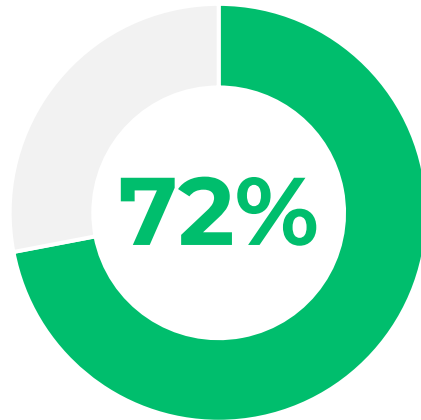


73% out of those who consider a free option also consider a paid option

Top 5 Formats

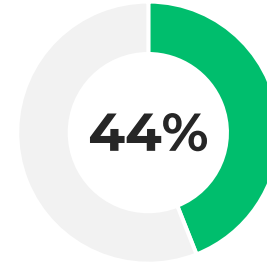
preferred program formats

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

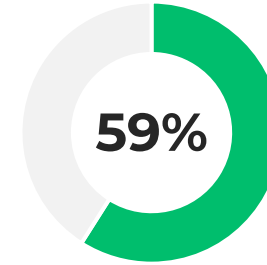


believe **online learning adoption will increase** in the near future

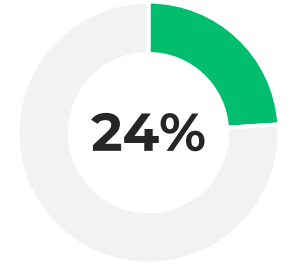
due to the current global developments...



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

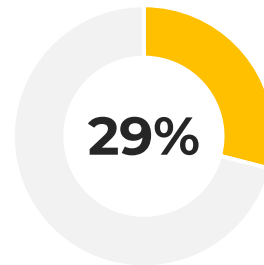


claim their interest in pursuing **online education** has increased

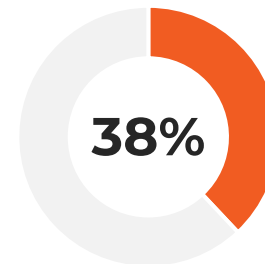


expect their **personal spend with education** to increase in the next 6 months

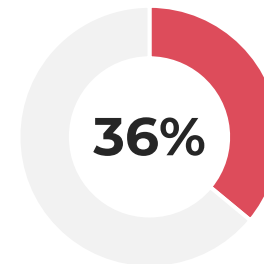
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

77%

would consider either a hybrid or online approach

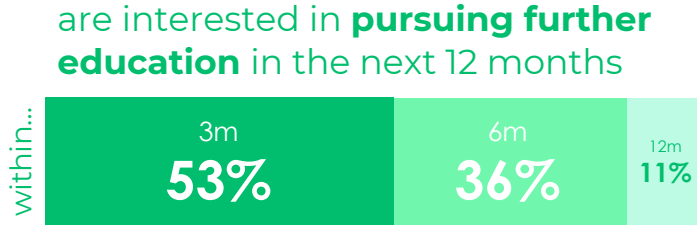


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | India

Learning about the future of online education | Wave #2

520
RESPONDENTS

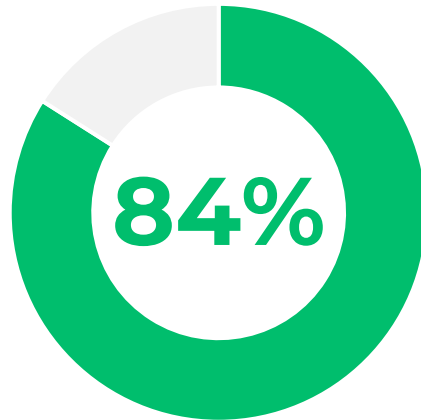


88% out of those who consider a free option also consider a paid option

Top 5 Formats

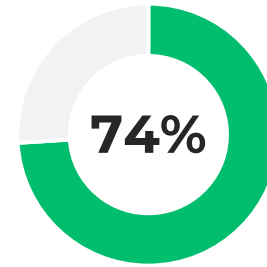
preferred program formats

- #1 Free MOOCs
- #2 Paid online mini courses
- #3 Free self-guided learning
- #4 Paid online postgraduate diploma
- #5 Paid online graduate, top, global university

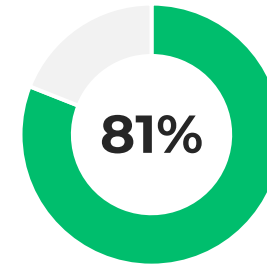


believe **online learning adoption will increase** in the near future

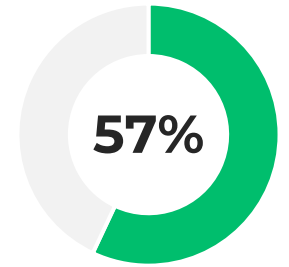
due to the current global developments...



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

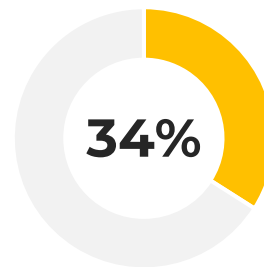


claim their interest in pursuing **online education** has **increased**

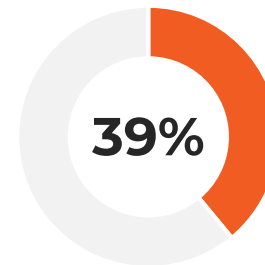


expect their **personal spend with education to increase** in the next 6 months

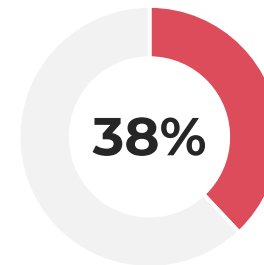
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

77%

would consider either a hybrid or online approach

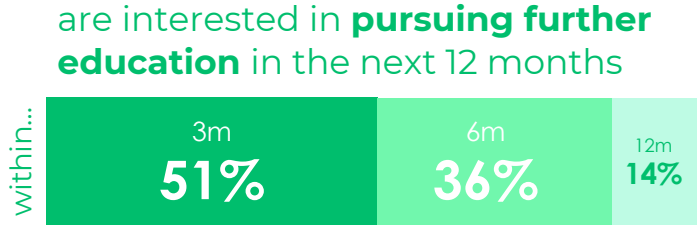


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | LATAM

Learning about the future of online education | Wave #2

168
RESPONDENTS

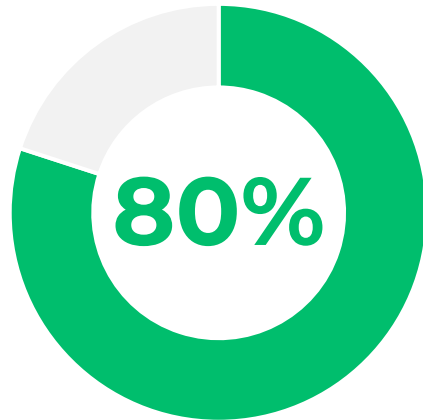


78% out of those who consider a free option also consider a paid option

Top 5 Formats

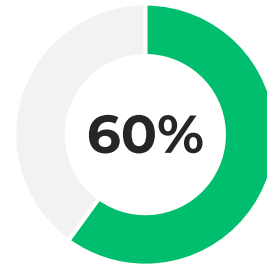
preferred program formats

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

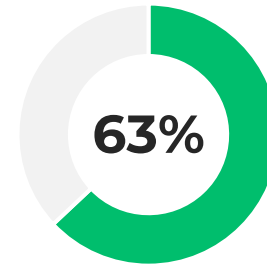


believe **online learning adoption will increase** in the near future

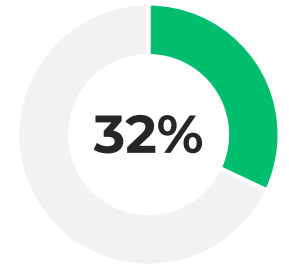
due to the current global developments...



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

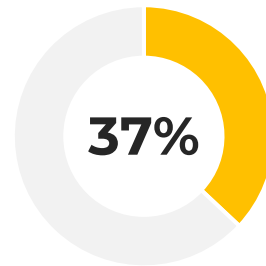


claim their interest in pursuing **online education** has **increased**

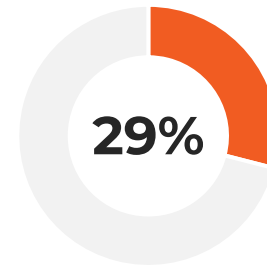


expect their **personal spend with education to increase** in the next 6 months

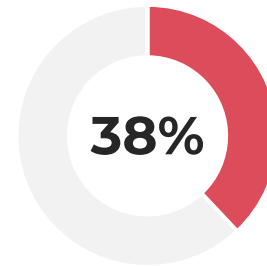
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

89%

would consider either a hybrid or online approach

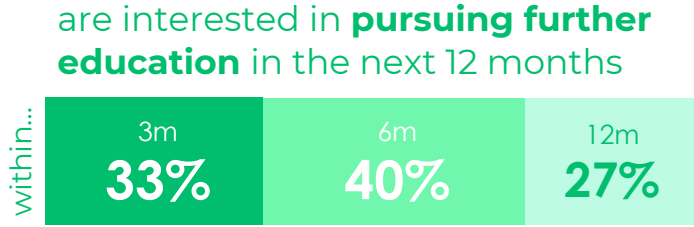


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | Singapore

Learning about the future of online education | Wave #2

160
RESPONDENTS

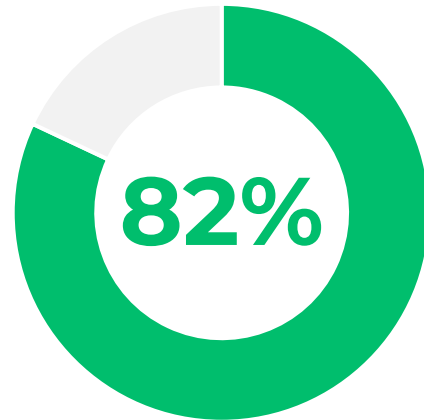


86% out of those who consider a free option also consider a paid option

Top 5 Formats

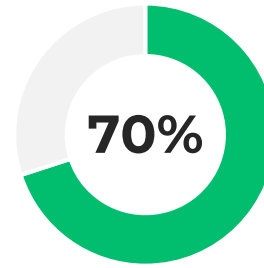
preferred program formats

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

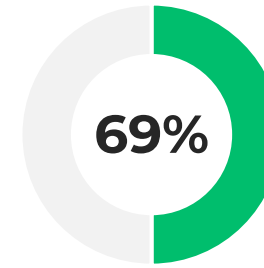


believe **online learning adoption will increase** in the near future

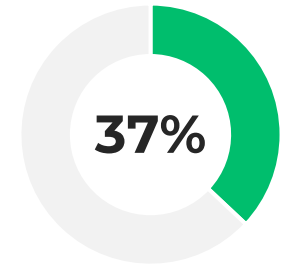
due to the current global developments...



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

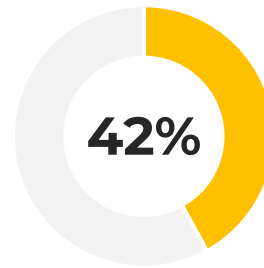


claim their interest in pursuing **online education** has increased

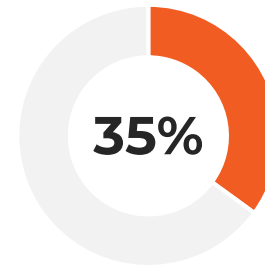


expect their **personal spend with education** to increase in the next 6 months

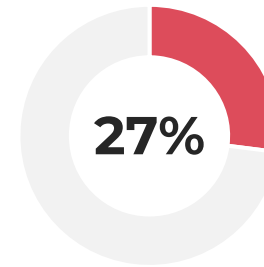
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

74%

would consider either a hybrid or online approach

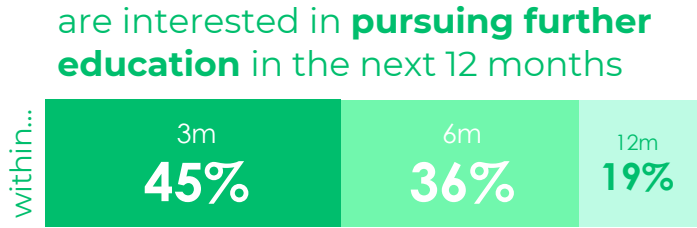


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | UAE

Learning about the future of online education | Wave #2

160
RESPONDENTS

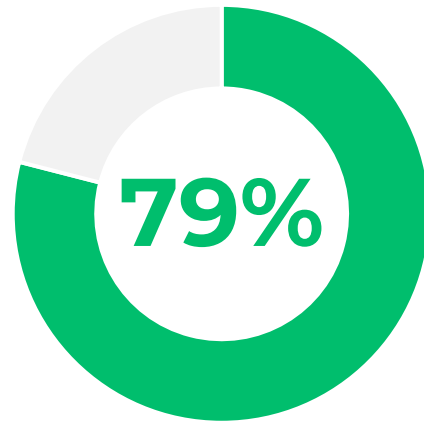


85% out of those who consider a free option also consider a paid option

Top 5 Formats

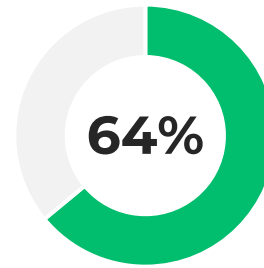
preferred program formats

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

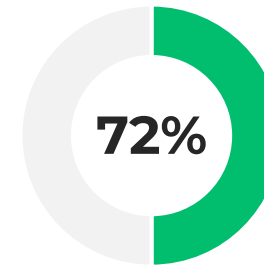


believe **online learning adoption will increase** in the near future

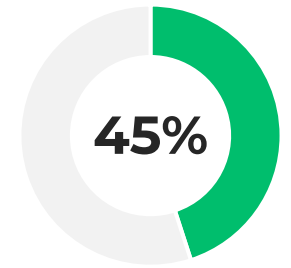
due to the current global developments...



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

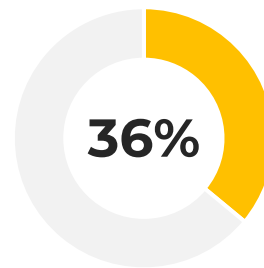


claim their interest in pursuing **online education** has increased

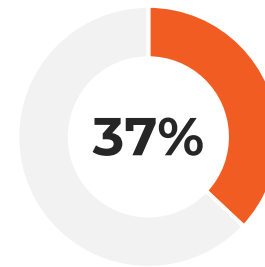


expect their **personal spend with education to increase** in the next 6 months

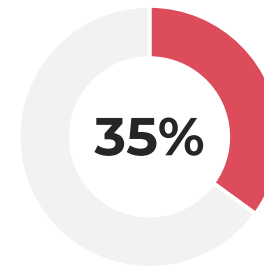
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

71%

would consider either a hybrid or online approach

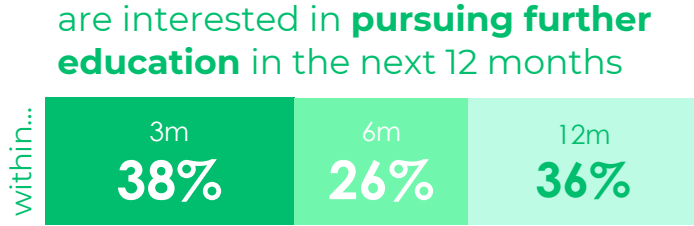


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | United Kingdom

Learning about the future of online education | Wave #2

174
RESPONDENTS

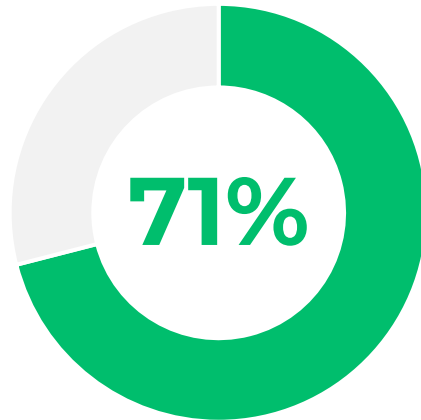


69% out of those who consider a free option also consider a paid option

Top 5 Formats

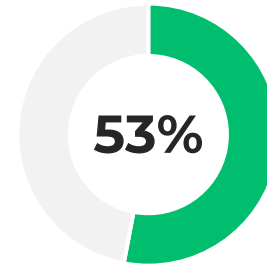
preferred program formats

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

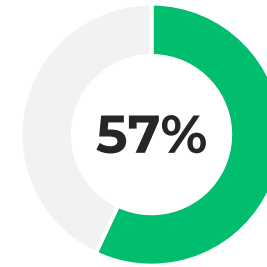


believe **online learning adoption will increase** in the near future

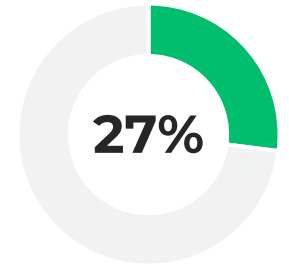
due to the current global developments...



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

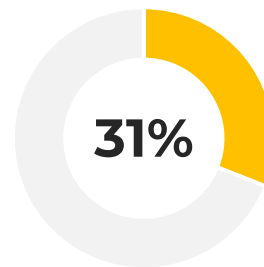


claim their interest in pursuing **online education** has **increased**

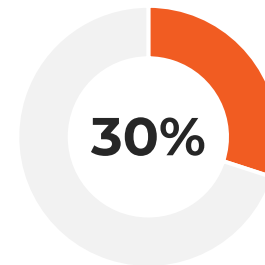


expect their **personal spend with education to increase** in the next 6 months

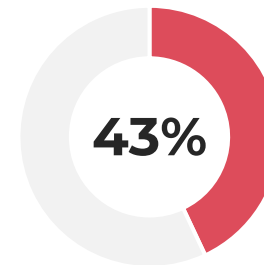
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

84%

would consider either a hybrid or online approach

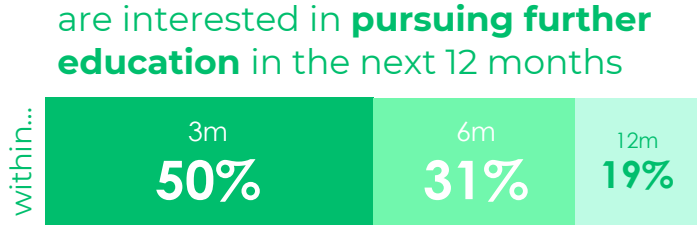


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)

Global Consumer Sentiment | United States

Learning about the future of online education | Wave #2

310
RESPONDENTS

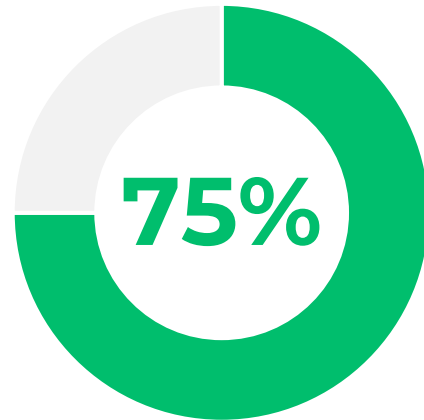


92% out of those who consider a free option also consider a paid option

Top 5 Formats

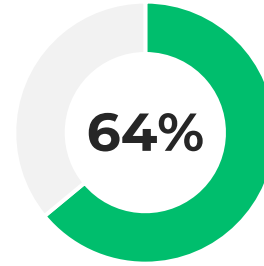
preferred program formats

- #1 Paid online mini courses
- #2 Free self-guided learning
- #3 Paid online postgraduate diploma
- #4 Paid online graduate, good 2nd tier university
- #5 Paid MOOCs

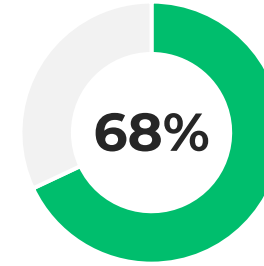


believe **online learning adoption will increase** in the near future

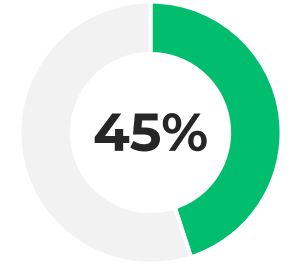
due to the current global developments...



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

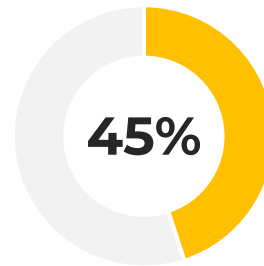


claim their interest in pursuing **online education** has **increased**

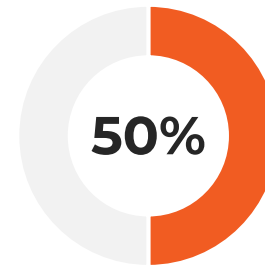


expect their **personal spend with education to increase** in the next 6 months

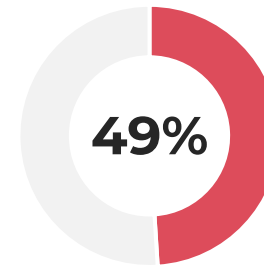
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

86%

would consider either a hybrid or online approach



SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14th and Jan 24th, 2021 - Total Sample (n = 2,132)



APPENDIX | WAVE #1

PROJECT SPECS

Global Consumer Sentiment | May 2020

Data Collection, Target Audience and Sample

DATA COLLECTION METHOD

Online questionnaire CASI on Qualtrics®

INSTRUMENT

CASI – 7-minute survey

DATA COLLECTION PERIOD

April 22nd through May 4th, 2020

SAMPLING METHOD

Stratified Random Sampling.
Online panel managed by Qualtrics®.

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.

SAMPLE DISTRIBUTION

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 in order to all countries have the same representation.

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

thank you!