



The State of Learning

Executive Summary

The first annual report published by learndirect Digital Group and led by Chief Executive Officer Wayne Janse van Rensburg identifies the core motivations for online learning during a time of economic uncertainty, how traditional education fits into a digital-first society, and the generational and regional attitudes towards online learning. This provides us with insight into the UK's commercial education industry, and how best to meet the demands of the modern learner.

As the UK's leading online learning provider, we believe that knowledge is for everyone, regardless of background or previous qualifications. By having an in-depth understanding of the current market, we can create the modern approach to learning, adapting and evolving to ensure that we provide flexible and accessible education to all.



Our Research

We surveyed a sample of learndirect learners, gathering socioeconomic information, as well as their learning preferences and motivations for studying online. We asked their thoughts on the cost-of-living crisis and how it may have affected purchasing behaviours and their attitude towards commercial online education. We also gathered their opinions on whether the current education system in the UK caters to people from all walks of life.



Key Findings

The data gathered from our research told us that:

- Affordability and flexibility are key drivers – The two core priority pillars for people choosing to enrol on an online course are around cost and convenience
- Families are willing to spend on education despite rising living costs – Adults are unwilling to compromise on their professional and personal development despite the surge in household costs
- Gen Z are losing faith in the UK education system – Younger generations are questioning whether the education system in the UK currently caters to all
- Boomers are more digitally savvy than we may think – Older generations are turning to online education in the hope of changing their careers later in life
- NHS strikes are not putting off everyone – Many people still have the ambition to study towards careers in nursing, particularly Gen Z, despite NHS strikes over pay
- There is a North/South divide – Learners in the north value affordability more than their counterparts in the south, while more people in the South of England are studying online compared to northern regions
- Qualifications are a route to economic recovery – To get us through the cost-of-living crisis, many people believe that gaining a new qualification will put them in a good position to earn a better living
- Traditional learning could be irrelevant in 10 years' time – Learners predict that online education will surpass traditional classrooms in a decade
- Workers are taking control of upskill training – Many people are turning to online courses to upskill outside of work, raising questions over whether businesses are offering enough training in the workplace



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Introduction

In today's world, the way in which we learn heavily caters to a digital-first approach, and this spans across the educational landscape. In fact, by 2025, governments, businesses, and customers around the globe are set to spend at least \$7 trillion (£5.7 trillion)¹ on education and training, with a large portion of that invested in education technology.

Worldwide, there are more than 100 million learners studying an online course², indicating that the demand for digital education is going to continue growing, but how do we keep up with the demand? To satisfy this need, it's important to understand how the state of learning has changed throughout the years, and what drives the motivation of the modern learner.

The purpose of our research is to delve into this mindset generationally and regionally, considering various factors, including economic climate and the existing education system in the UK. With this knowledge, we can establish the current state of learning, consider how it will evolve, and the steps we can take to make education accessible to all.



Who is learndirect Digital Group?

With a mission to provide flexible and accessible learning that suits all lifestyles, learndirect is a leading course provider in the online education space, made up of a series of EdTech businesses. Through digital solutions, we deliver a range of nationally and internationally recognised courses for learners at various stages of their development.

Regardless of background, qualifications, or goals, our aim is to empower people to reach their full potential. Through the deliverance of qualifications via easy-to-use technology, we have supported millions of individuals, whether that be boosting their employability or furthering their academic profile.

Over the years, our programmes have reached into local communities, businesses, and people's homes, adapting to the evolving nature of learning. Following the Covid-19 pandemic and the shift in political and economic landscape, it's time to dig deeper into the modern learner profile.



Meet Our CEO...

Group Chief Executive Officer (CEO) of learndirect Digital Group Wayne Janse van Rensburg pioneers the objective of making education accessible to all. With learners being at the heart of every aspect of development, learndirect aims to evolve alongside the ever-changing education landscape.

“ To ensure that all individuals across the country have the opportunity to reach their full potential, we need to understand what motivates them, what their goals are, and how they like to learn. With this knowledge, we can remove barriers to enable a learning lifestyle that gives everyone a chance to further themselves professionally or personally. ”

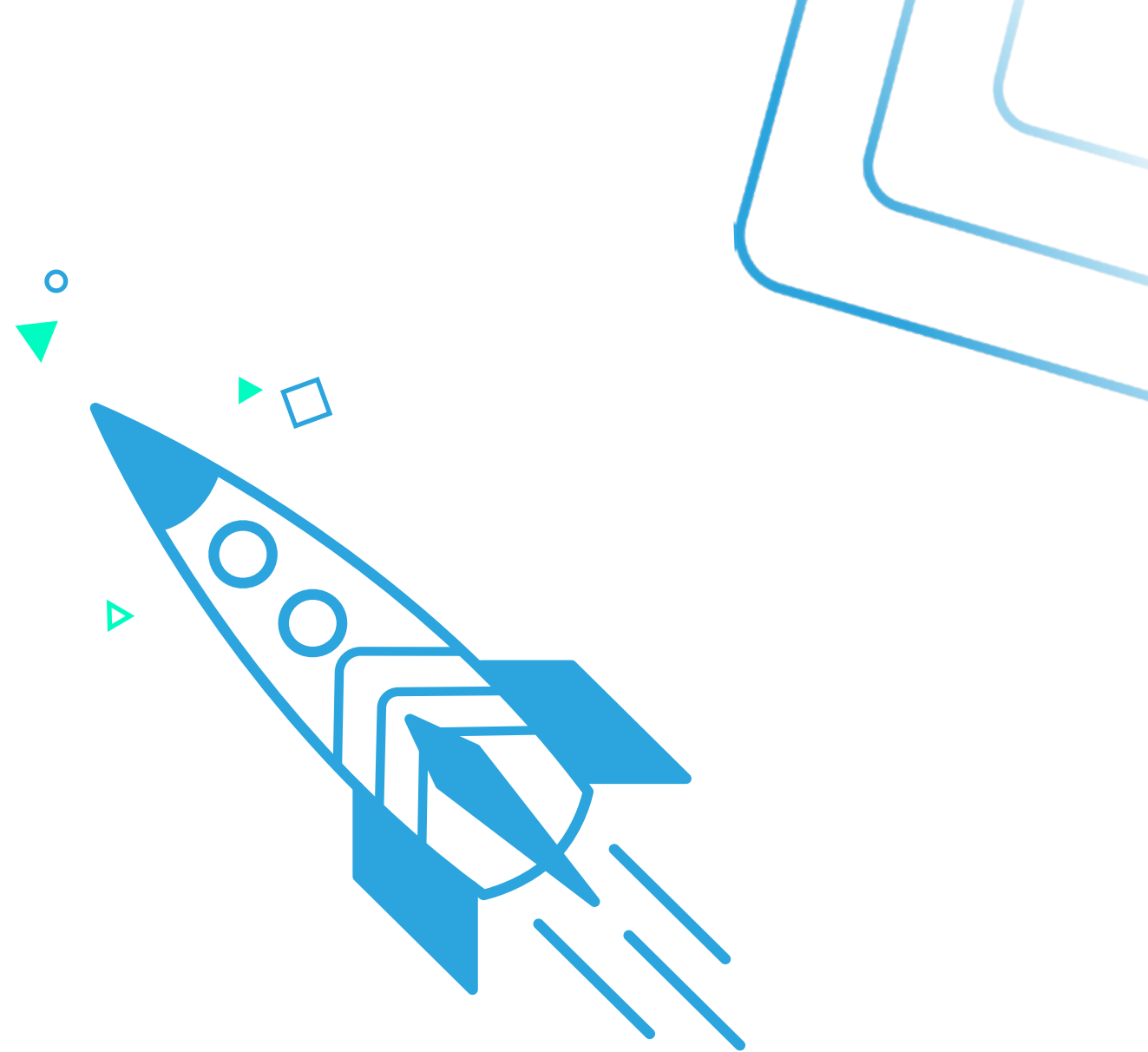


Our Vision

To create the modern approach to learning, we need to understand how learners like to consume information and develop their skill set, as well as understand what is valuable to them. Getting into the minds of learners allows us to provide a learning lifestyle that caters to the wants and needs of every demographic.

By understanding why and how, we can continue to provide support that matches learners' motivations and their studying preferences, adopting an agile approach no matter the external circumstances.

Being equipped with this insight enables us to remove barriers getting in the way of people discovering their full potential.



How Has Learning Changed?

Long gone are the days when chalkboards and classrooms were the only way to learn a new subject or skill.

In this modern age, people can develop academically, professionally, and personally through online education, but how did we get there?

Four years after the World Wide Web was introduced, commercial internet access was available, and computers became commonplace in schools.

1995

Interactive White Boards (IWBs) and new digital materials are developed for educational institutions.

2000

Personalised learning emerges as a UK government policy, with the purpose of tailoring the education system to the learner.

2004

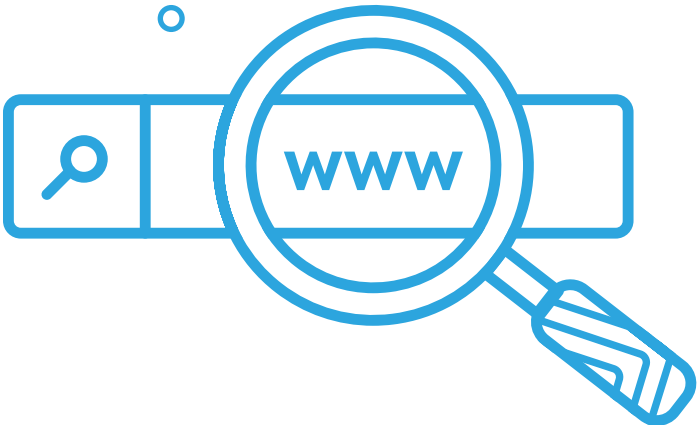
The first iPhone is released, alongside the first generation of Kindles. Education institutions begin taking advantage of self-publishing platforms.

2007

Massive Open Online Courses (MOOCs) are introduced as a way to give learners a taste of their chosen subject free of charge.

2008

As EdTech continues to grow and develop, so does the desire to study online, with the term 'online learning' consistently searched for on Google over the past 12 months, while 'online courses' experienced a surge in searches at the beginning of 2022.



The iPad is released, leading to tablet technology being adopted across schools and other education facilities.

2010

Adaptive learning becomes more common in educational settings, offering personalised learning.

2012

Interactive content and video feature more frequently in training programmes.

2018

Following the outbreak of Covid-19, schools, colleges, and universities become remote, with students studying solely online.

2020

Augmented Reality (AR) and Artificial Intelligence (AI) start to filter into the learning process.

2022

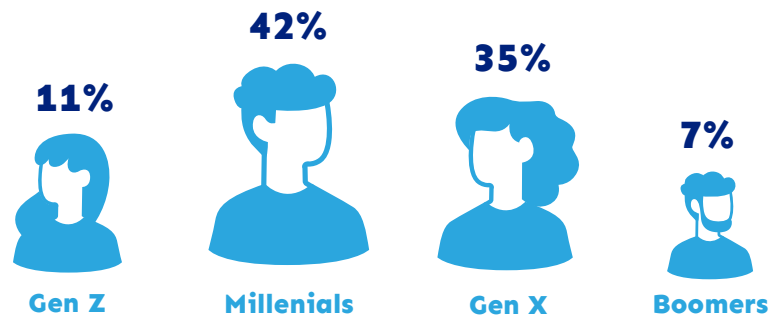


The Modern Learner

To discover the makeup of the modern learner, we reached out to a sample of individuals who studied a course with learndirect. Through this research, we were able to determine a modern learner profile.

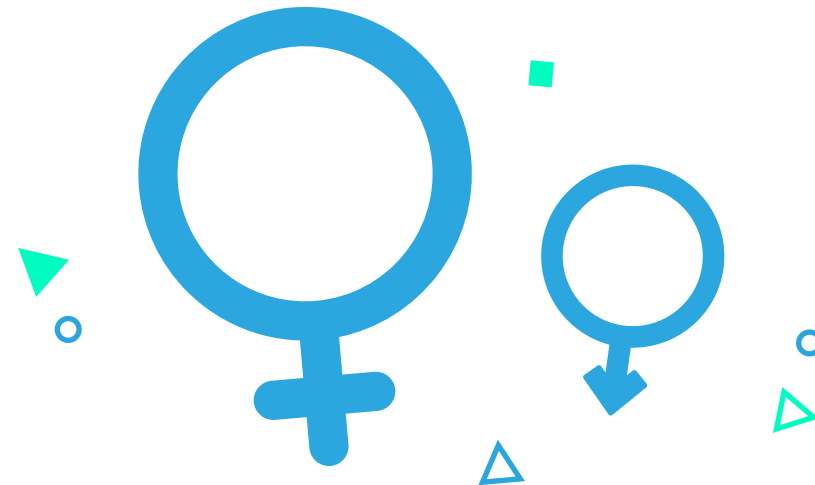
Millennials Dominate

42% of learners fall under the Millennials generation, aged between 26 and 41, and Gen X (42-57) make up 35% of enrolments, while Gen Z (11%) and Boomers (7%) also feature. The remaining 5% of those surveyed did not disclose their age.



A Woman's World

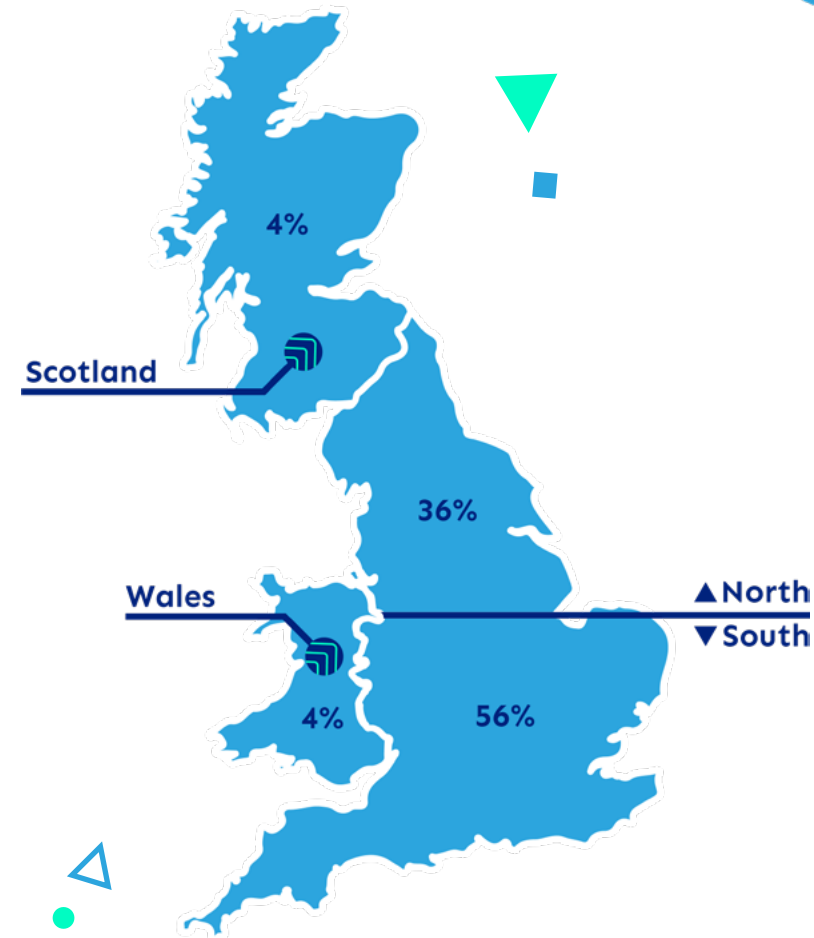
An overwhelming 83% of learndirect's learner database are women, while 16% of learners studying an online course are men.



The North/South Divide

More individuals from the South of England enrolled on a course with learndirect over the last four years (56%), with 19% of learners residing in the South East. In comparison, only 36% of enrolments came from Yorkshire and the North of England, with the smallest sample in Wales (4%) and Scotland (4%).

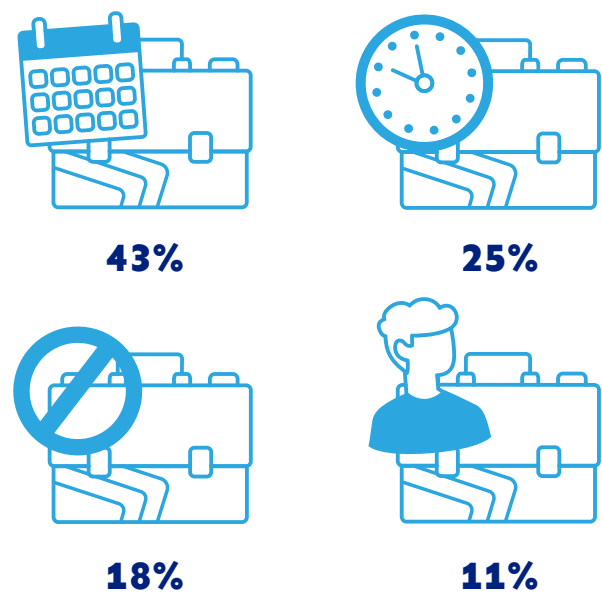
The motivations for online learning differ across regions too, with 38% of Londoners citing career progression over career change (26%), while 30% of those surveyed in Wales prioritised a change in career over taking the next step in their existing career (10%). With distance learning being accessible from home, learners' study in various towns and cities across the country.



Full Time Workers

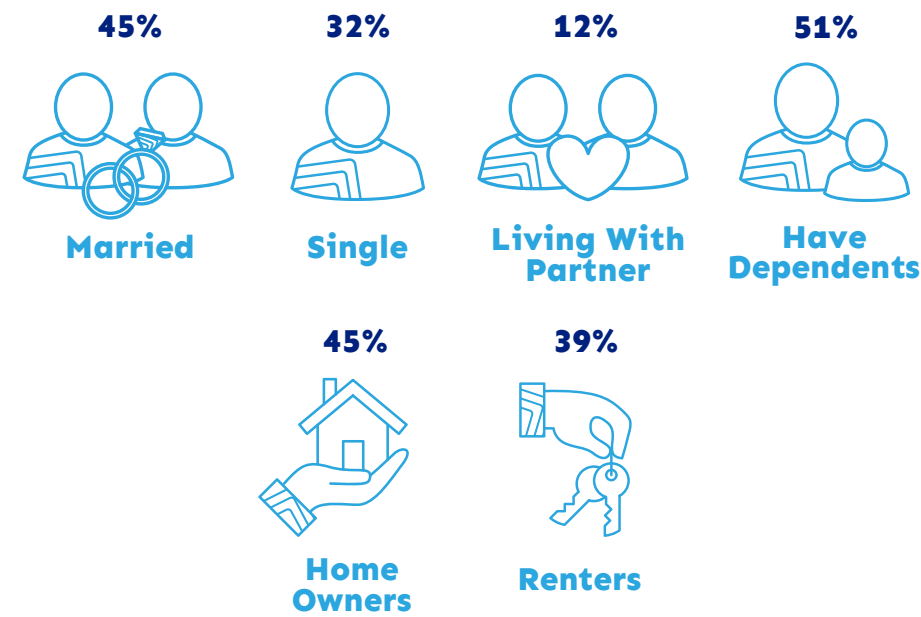
Most learners are in full-time employment (43%), with 25% of part-time workers choosing to study an online course. Out of the learners asked, 18% of them are not currently working, whereas 11% work for themselves.

Jobs in healthcare and education dominated the list of occupations.



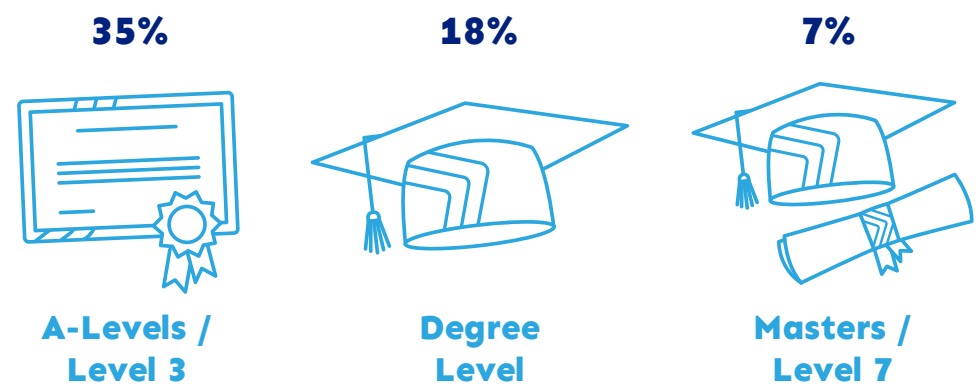
Family Living

Just under half of learners have tied the knot (45%), while 32% of them are living the single life and 12% are unmarried and living with partners. Having dependents under the age of 18 to look after hasn't stopped 51% of learners studying a course, while there are more homeowners (45%) than renters (39%) who make up our pool of respondents.



A Level Achievers

Most of our learners are already qualified at a post-secondary school level, with 35% possessing A Levels or Level 3 equivalent qualifications, while 18% are degree-level educated. A small 7% of enrolments were made by individuals that have a master's or Level 7 equivalent.



Digital Learning for Professional Growth

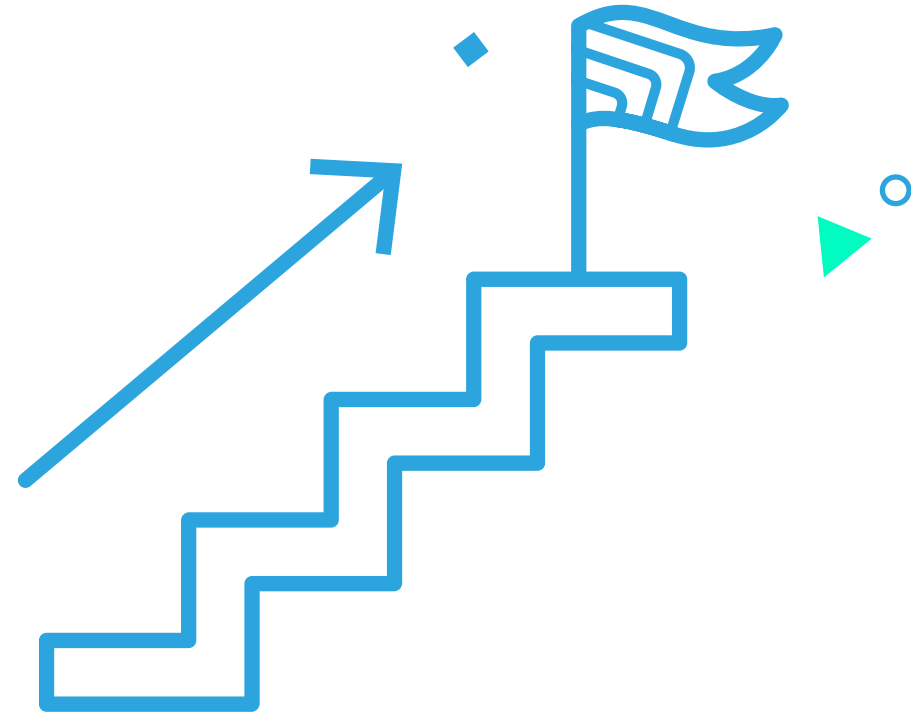
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Digital Learning for Professional Growth

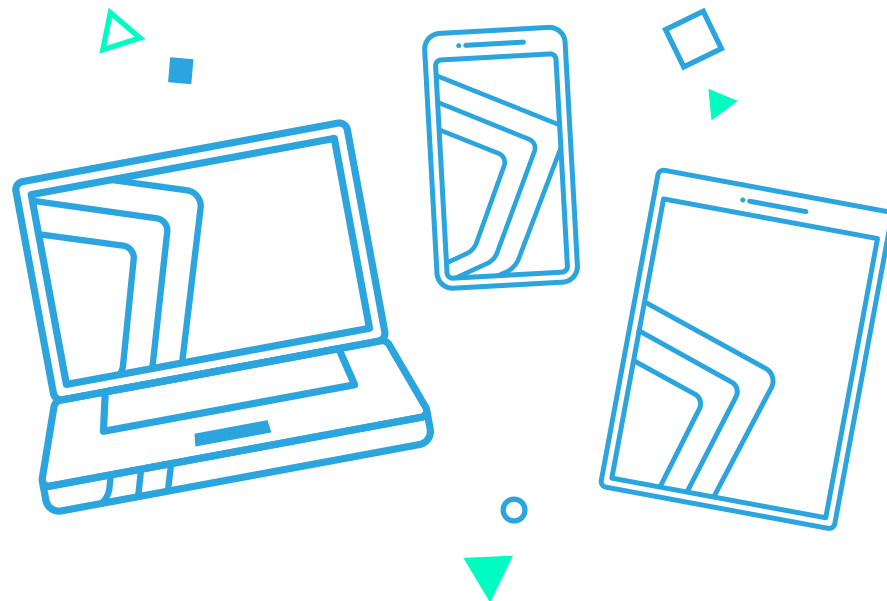
While the popularity of studying online has increased over the years, we need to ask ourselves why and for what purpose? There is a driving motivation behind every decision we make, and our research aims to discover what those factors are when it comes to choosing online courses.

Career advancement and developing professional skills are significant drivers, according to our research, such as the ease and accessibility of online courses. However, there are issues that come with digital development. So, before we delve into our findings, let's consider the barriers.

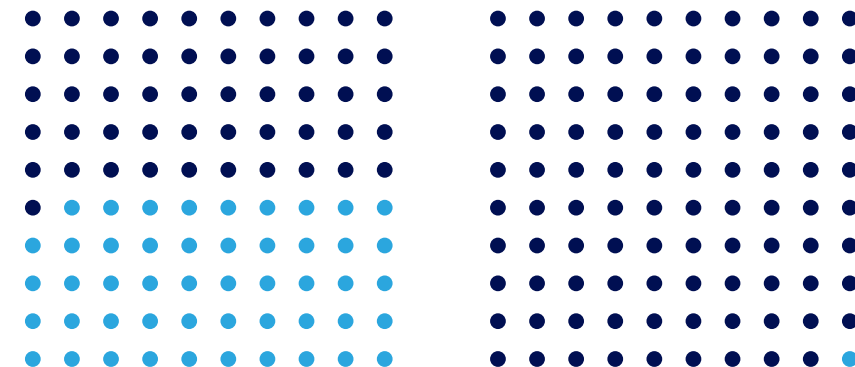


The Digital Divide

Living in a digital-first society brings with it plenty of opportunities, as well as convenience for day-to-day living. However, the benefits of this technology are not felt by everyone. Access to the internet, laptops, tablets, smartphones etc is unequal, which means that not every community is able to gather the same level of resources and information.



Through online learning, individuals can further their careers, learn a new skill, or indulge in their passion, but social and economic inequalities lead to digital exclusion. This problem was heightened in 2020 during the Covid-19 lockdown, in which people had to operate their lives from home. Only 51% of households with an income of between £6,000 and £10,000 had access to home internet, whereas 99% of households earning over £40,000 were online.³



Financial status plays a significant role in accessibility to digital technology, and it has been found that even when poorer households had internet access and equipment during the pandemic, they were unlikely to have the digital skills required.⁴

The Department of Education made a conscious effort to help young people without internet access by providing over one million laptops and tablets to households across the country during the pandemic, while mobile operators provided additional data to families. However, in 2021, 1.5 million UK homes were still offline, while the elderly, disabled, and financially vulnerable were more likely to be at a disadvantage in the digital space.⁵



Lack of Upskilling in the Workplace

Many people strive to move up the career ladder in their respective industries, but to take that next step, they need to develop the skills that will propel them to the next level. In this digital age, advancements are being made across all industries, and it is up to us to keep up!

In fact, the importance of having digital skills in the workplace cannot be underestimated, with research suggesting that £50 billion could be at risk to the UK economy if businesses only focus on hard digital skills as opposed to a blend of hard and human digital skills.⁶

While this demand is high, not all workers feel that they can upskill in their current workplace, with some organisations not offering the opportunity to do so. Not only that, but 1 in 10 workers don't feel comfortable bringing up the desire to upskill to their employer.⁶

Given the fast-paced nature of today's modern life and companies' need to compete in a digital market that never sleeps, the need to upskill employees is high, both for the business and the individual.



1 in 10 workers don't feel comfortable bringing up the desire to up-skill to their employer

Flexibility and Freedom

Our research has explored why individuals have chosen to study a course online, and one of the overriding reasons centres around the digital manner of the course's delivery and the flexibility that it offers.

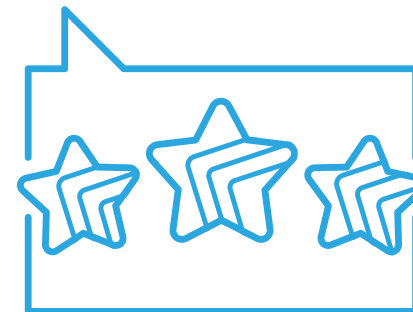
More than half of respondents (61%) claimed that being able to fit their studies around their existing lifestyle was a major draw, while 45% took the leap knowing that they could study while working full-time.

With some workers not feeling comfortable enough to ask their employer for training, studying an online course gives them the option to further their development without it affecting their daily job.

Learner Testimonial – Stephanie Wallace (Access to Higher Education (Nursing) student)



It was the best option for me because it enabled me to study in my own spare time and still work a full-time job.



Boomers Proving to be Digitally Savvy

While there is evidence that older generations are more likely to be digitally excluded, our research found that 72% of Boomers (aged 58-76) surveyed prioritised the flexible online nature of the course as a key reason for enrolling. This suggests that older generations are more digitally savvy than some may believe!

Like their older counterparts, 79% of Gen Z (aged 18-25) learners were motivated to enrol so that they could study around their lifestyle, while 78% of Millennials (aged 26-41) and 80% of Gen X (42-57) learners prioritised the affordability of the course and the flexible payment options on offer as key drivers for enrolling.



Gen Z



Millenials



Gen X

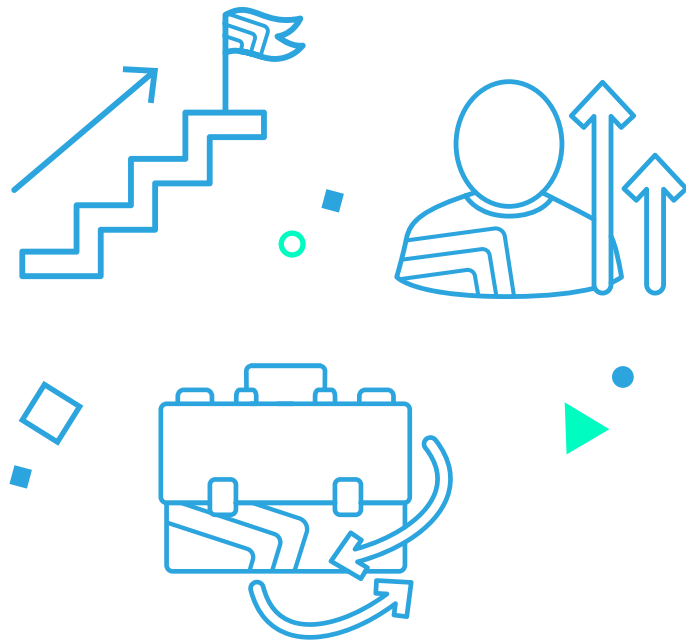


Boomers



Promotion Chasers, Career Ladder Climbers and Career Changers

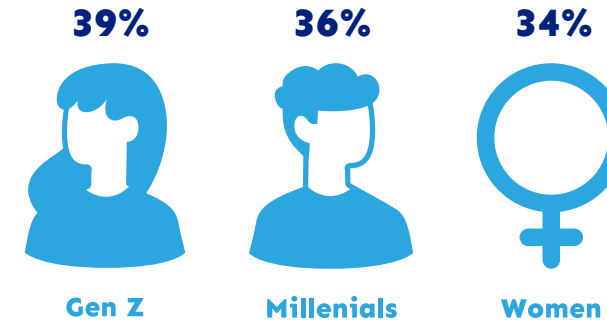
While the flexibility of studying an online course is a driving factor for most learners, this only concerns the delivery aspect of the course. In terms of goals, what are learners hoping to achieve? We have identified three main motivations.



Moving Up the Career Ladder

Many individuals who begin a career have the ambition to move up the ladder and better themselves both professionally and personally. Through our research, we found that 32% of learners have the desire to take the next step in their career and believe that learning online is the best way to do that.

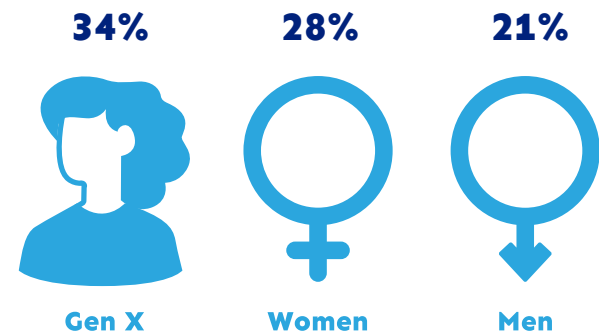
Gen Z (39%) and Millennials (36%) are more likely to prioritise moving to the next stage in their careers compared to Gen X learners (32%), while more women (34%) than men (21%) have enrolled on an online course in the hope of furthering their job prospects.



Promotion Go-Getters

With upskilling not being offered by all businesses, some learners are developing their skill set outside of their normal work hours, taking job development into their own hands. In fact, our research shows that 27% of learners studied online to give themselves a better chance of getting promoted to a higher-paid role at work.

34% of Gen X learners are motivated to study online in the hope of getting a better salary and promotion in their existing job, which is slightly higher than the quarter of Gen Z and Millennials who feel the same.



Chasing promotions is something both men and women strive for, but when it comes to developing their skills through online courses to seek a higher-paid role, it's women who have the edge, with 28% compared to 21% of men surveyed.

Career Switchers

For many people that go down a certain career path, they reach a point in life where they want to embark on a new direction. It can be a daunting prospect for many, particularly if they are comfortable in their current industry. With the rise in online learning, the opportunity to make a career change is more feasible.

By getting qualified through accredited online courses, individuals can gain the skills and knowledge they need to pursue a new career without having to give up their existing job. In fact, a quarter of learners claimed that one of their key reasons for studying online was to change their career.



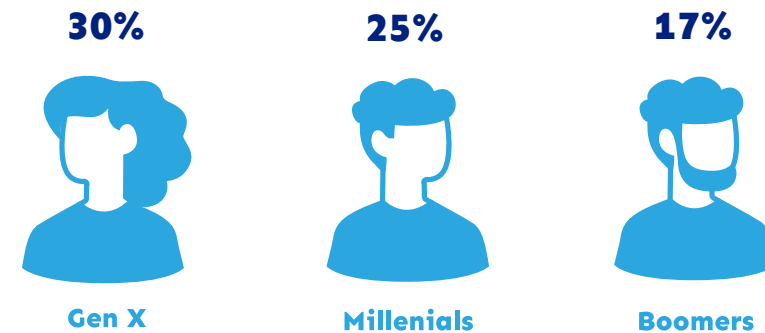
This is a motivating factor for many learners embarking on a career in healthcare. Interestingly, the desire to become a Nurse is still prevalent despite the NHS strike action. In early October 2022, the Royal College of Nursing (RCN) launched a ballot to its members regarding a strike over pay⁷, with the first wave of NHS strikes in December and additional action taken in January and February.

Generationally, it's Gen Z whose interest in studying nursing hasn't wavered, with many turning to learndirect to study the Access to Higher Education Diploma (Nursing), which offers a gateway to university for those who don't have the traditional qualifications needed to study a degree. So, despite strike action being in full flow, the desire to pursue a career in this sector remains.

With Gen Z being in their teens or early twenties when the Covid-19 pandemic began in 2020, they would have been absorbed by the nation's narrative, with Nurses very much emerging as heroic figures. Has this been influential in young people pursuing a nursing career?

Perhaps the dispute over pay hasn't affected Gen Z due to them being empowered by real life heroes.

Across the wider working sphere, age is just a number! 30% of Gen X learners surveyed aged between 42 and 57 have studied online to embark on a career change, compared to a quarter of Millennials. Not only that, 17% of Boomers surveyed also expressed their desire to change jobs, suggesting that starting a career from scratch is not just for younger generations.



Key Recommendations

Bridge the Gap

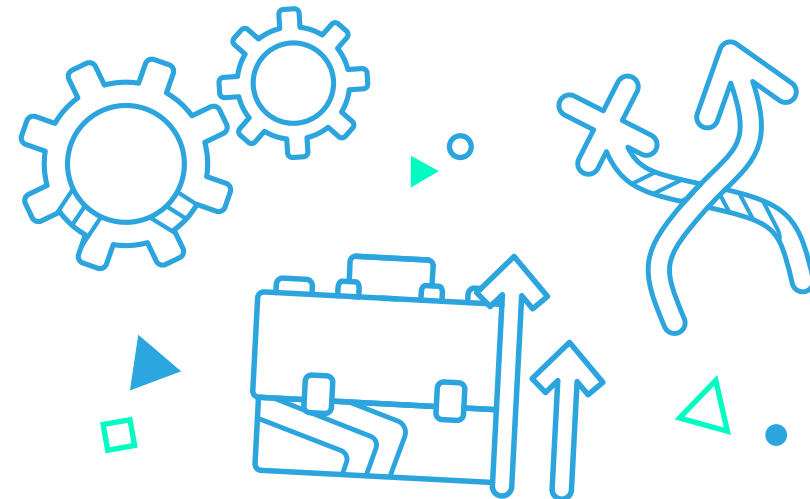
While our research shows that older generations are more digitally versed than otherwise suggested, socioeconomic factors contribute to a wider digital exclusion. To address this issue, the underlying causes need to be tackled on a national scale through government initiatives. Broadband affordability is key, as is access to technology and devices. Course content itself needs to be readable and easy to use for all ability levels.

Encourage Businesses to Upskill

With studies showing the importance of upskilling in the modern workforce, businesses that don't already offer in-house training opportunities can take advantage of external solutions. The knowledge we have gained enables us to reach out to businesses to provide training options to their employees.

Give Guidance

31% of learners told us that they were previously held back from studying because they were unsure of the subject they wanted to study. With this in mind, we can look at how we provide guidance to customers, helping them make an informed decision about their future. By helping potential learners determine their career suitability, we can tap into the pool of indecisive customers.



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Motivations for Learning During an Economic Crisis

Economic uncertainty has plagued the UK since the Covid-19 pandemic in 2020. Brexit and the war in Ukraine has also contributed to the strife. With rising energy prices and the general cost of living increasing, it calls into question why individuals are choosing to spend money on an online course.

learndirect experienced a surge of enrolments between June and November 2022 – when inflation was at it's highest in the UK. This begs the question, why?

For the large majority of 2021, at-home learning was still a necessity due to intermittent lockdowns, yet the desire to enrol on an online course appears higher a year later despite the rise in cost of living.

Are people studying to get themselves in a job-ready position for when the economy bounces back? Are learners more inclined to purchase a course due to the flexible payment plans on offer? We explore these options and more.



Feeling the Squeeze

In August 2022, UK inflation rose above 10% for the first time in 40 years⁸, affecting millions of households up and down the country. Two months later, inflation rose to 11.1% as a result of soaring energy costs, squeezing the pockets of families even further.

According to the Office for National Statistics (ONS), almost half of energy-bill paying adults (45%) found it difficult to afford the cost, while 93% of those surveyed between 29th September and 9th October 2022 claimed that their cost of living had increased compared to the same time last year.⁹



Students in higher education have been among the demographics affected, with the ONS reporting that 9 in 10 students were worried about the rising cost of living and half (50%) admitted to experiencing financial difficulties.¹⁰



Worried about the rising cost of living



Admitted to experiencing financial difficulties

Money Matters

With all areas of the country being affected by the economic downturn, it makes sense that cost would be at the forefront of everyone's minds when making a purchasing decision, and this includes online learners.

The country experienced the height of the economic squeeze over the course of those five months, so why were individuals still keen to invest in their futures through distance learning?

Our research found that cost was unsurprisingly a key factor in the decision-making process, with just under half (46%) claiming that the course payment plan suited their financial situation, making it easier for them to pay over monthly instalments.

During this time of economic uncertainty, price comparing is prevalent, and our findings indicated that for 34% surveyed, affordability was a significant motivating factor in going ahead with their course purchase.

Such is the importance of cost in the online learning space, 39% of learners revealed that they had previously held back from studying sooner due to the inability to afford it. Despite concerns over cost, learners have felt reassured by the flexible payment options on offer.

Learner Testimonial – Abraham Salaki – Access to Higher Education (Nursing) Student

I discovered that among all the [courses] I saw, learndirect's tuition fee and payment arrangement would be the best option for me



Money Worries for Younger Generations

With daily living becoming more expensive by the year in the UK, it is no surprise that 18 to 25-year-olds are conscious about spending. 64% of Gen Z respondents claimed that the payment plan for their chosen online course was a main reason for purchasing during the cost of living crisis. This compares to 46% of Millennials, 44% of Boomers, and 42% of Gen X learners surveyed.

Feeling Money Conscious Up North

While flexible payment plans are priorities for most learners during the economic downturn, those surveyed in the North East of England (86%) and north of the border in Scotland (60%) chose to purchase based on affordability.

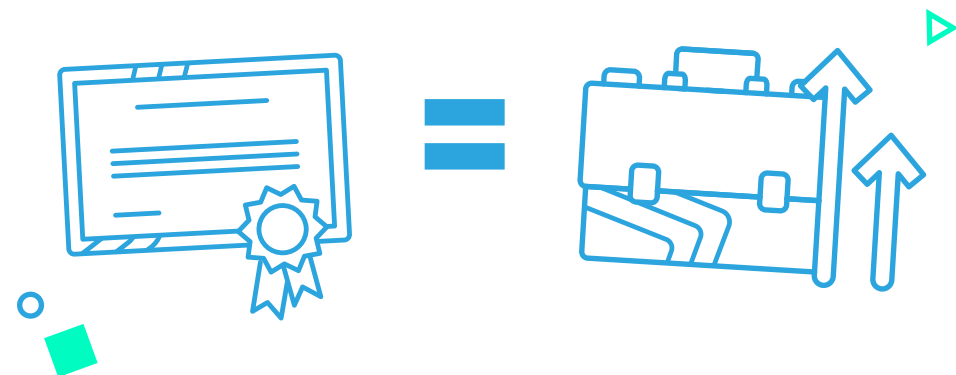
Half of respondents in the East of England and 56% of those in the East Midlands stated that the flexible payments led to them going ahead with enrolment, compared to 49% of Londoners.



Route Out of Economic Crisis

During an economic downturn, many people take stock of their lives and futures. Our research indicates that a portion of individuals feel that studying a course online will put them in a stronger position to thrive once the economy bounces back.

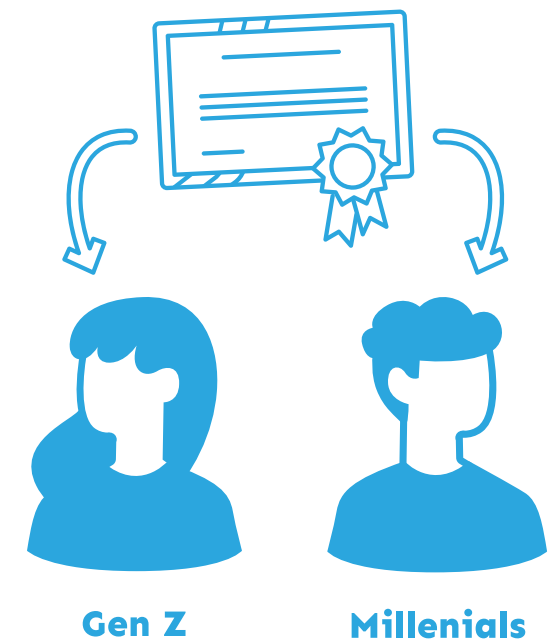
In fact, 34% of those surveyed believe that having a recognised qualification will make them a more desirable candidate in a competitive job market, while more than half (54%) of learners believe that they will be in a better position to earn money and get through the economic crisis if they study a new qualification.



Gen Z and Millennials Value Qualifications

In a digital world where people can become successful without an academic background, you may assume that young people are less likely to go down the traditional route of securing qualifications.

However, 36% of Gen Z and Millennials surveyed believe that having a recognised qualification will improve their chances of getting the job they want, while only 29% and 19% respectively, want to earn job-ready skills to enter the workforce quickly.



All Ages: Learning is the Answer

A consistent thread has emerged across the generations, and that is the opinion that studying an online course will help get them through the economic crisis. 71% of Gen Z learners surveyed are confident that they will be in a better position to earn money during this tumultuous time, while half of Millennials (50%) feel the same.

Older generations share the opinion of their younger counterparts, with 72% of Boomers agreeing that learning online will act as a route out of the recession, while just under half of Gen X learners agree.

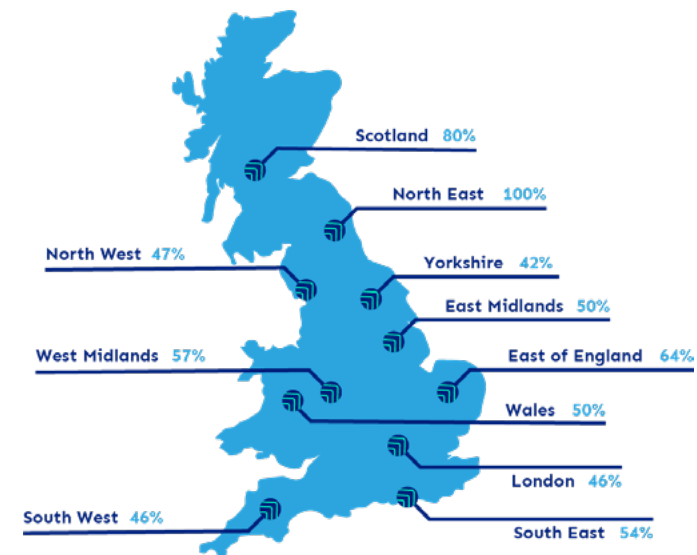


Believe learning is the answer

UK Sees Light at the End of the Tunnel

Our research indicates that people across the country see learning as a route out of the economic crisis. Out of the individuals surveyed, all respondents in the North East (100%) believe that studying a new skill or qualification will earn them more money to help them through the economic downturn.

The same goes for 80% of surveyed learners in Scotland and 64% of those based in the East of England. Half of learners (50%) in the East Midlands and Wales think online education will get them to the other side of these difficult times, while under half of Londoners (46%) agree.



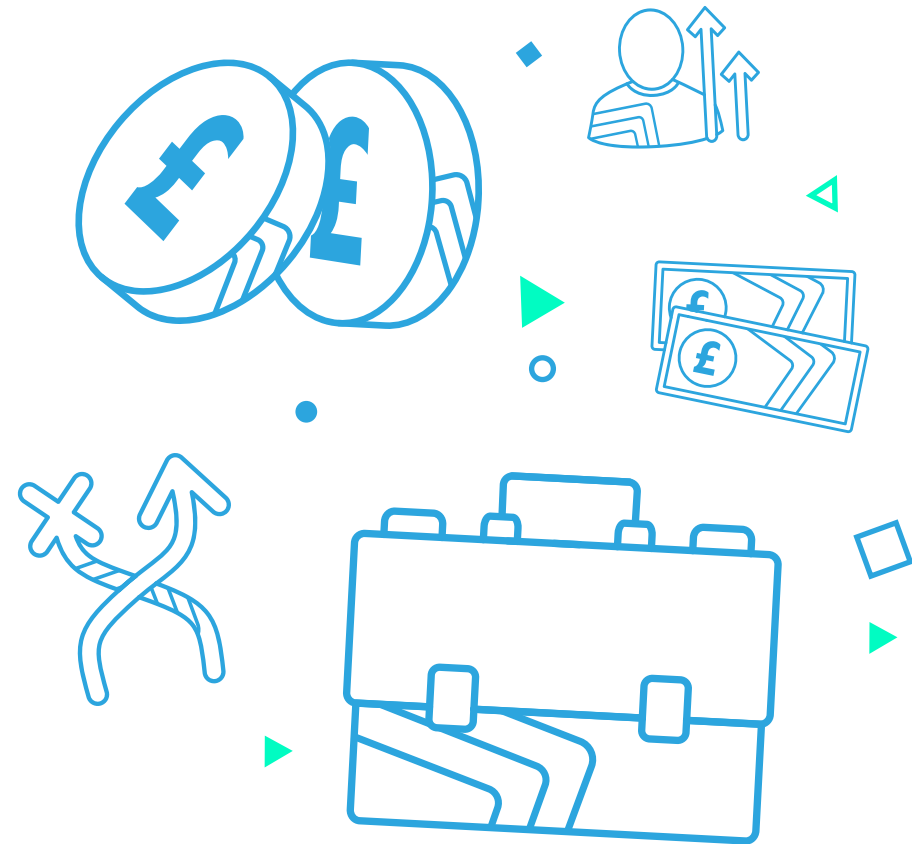
Key Recommendations

Affordability

During these trying times, it is no wonder that financial comfort is at the forefront of people's minds, and when it comes to learning, affordability is key. Purchasing a course is not a necessity, it is a choice that people make to further their careers, learn a new skill, or indulge in a passion. For them to make that choice in economic uncertainty, the cost needs to be manageable.

Career Support

For those who are looking to study for career purposes, providing additional support after they have qualified could help them take the next step in their journey, whether that be giving guidance on employability skills or pointing them in the right direction of their dream job.



The Modern View of Traditional Education

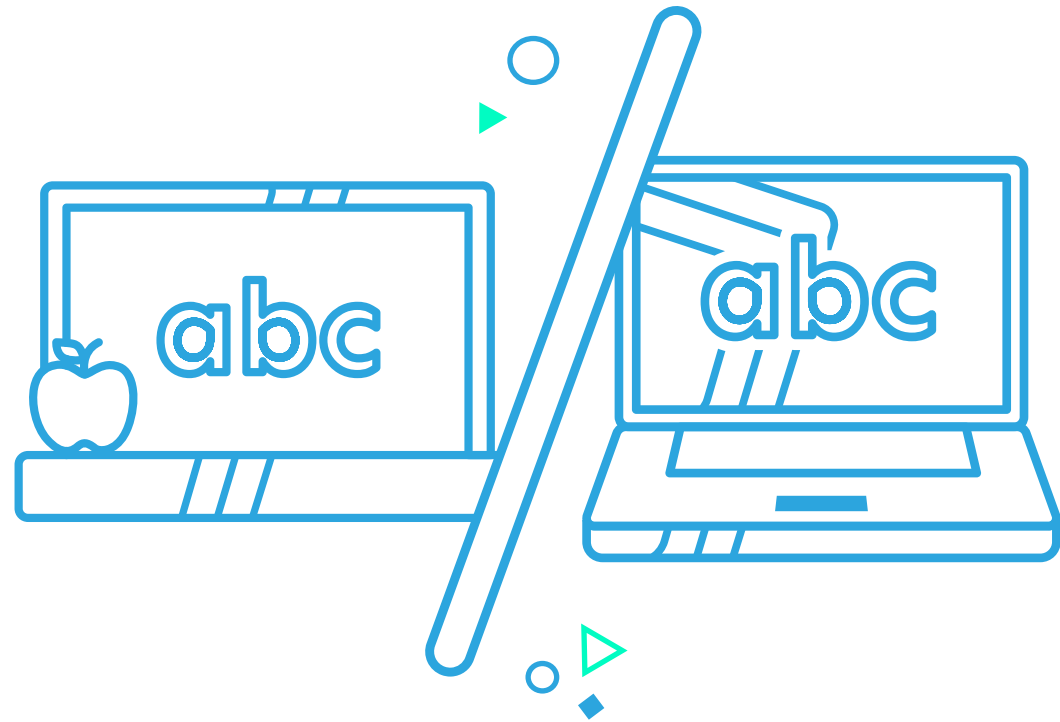
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The Modern View of Traditional Education

While the tradition of classroom learning still exists in schools, colleges, universities, and other education institutions, the rise of technology and our reliance on digital means has led many to question our existing education system.

Now that online courses are more accessible, some people in society are not only questioning the manner in which we learn but also what we learn, particularly in schools. Through the eyes and minds of modern learners, we discover their opinions on traditional education in a digital age.



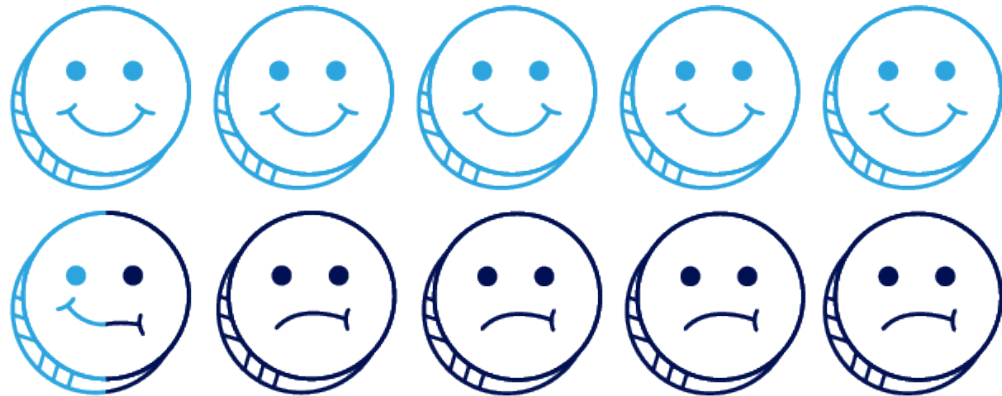
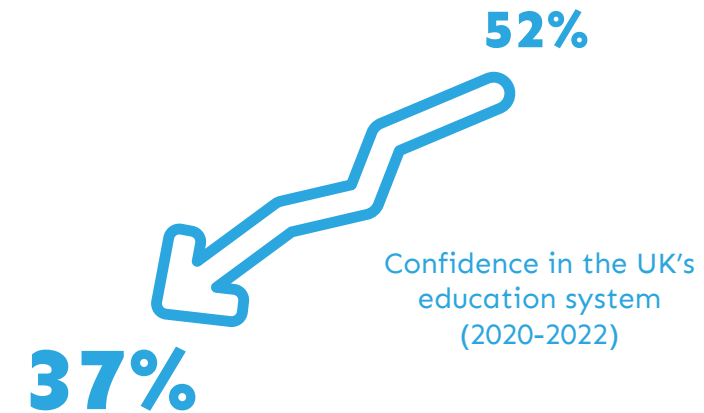
Is the Education System Failing?

The state of the current education system has been a talking point of late, with Youth MP for Wigan and Leigh Izzy Garbutt claiming in the Houses of Parliament in November 2022 that school students should be taught life and employability skills that will prepare them for the wider world.¹¹

Many individuals who feel as though those areas are lacking in traditional education have the option of turning to online learning, where they can choose a skill set and subject matter that caters to their exact need.

According to YouGov, faith in the education system has waned since May 2020, going from 52% of adults feeling good about the UK's education to just 37% feeling confident in November 2022.¹²

These figures indicate an overall trend, with 47% of our surveyed learners believing that the current system doesn't cater to everyone.



47% of learners believe that the education system doesn't cater to everyone

Young Minds Concerned About Exclusion

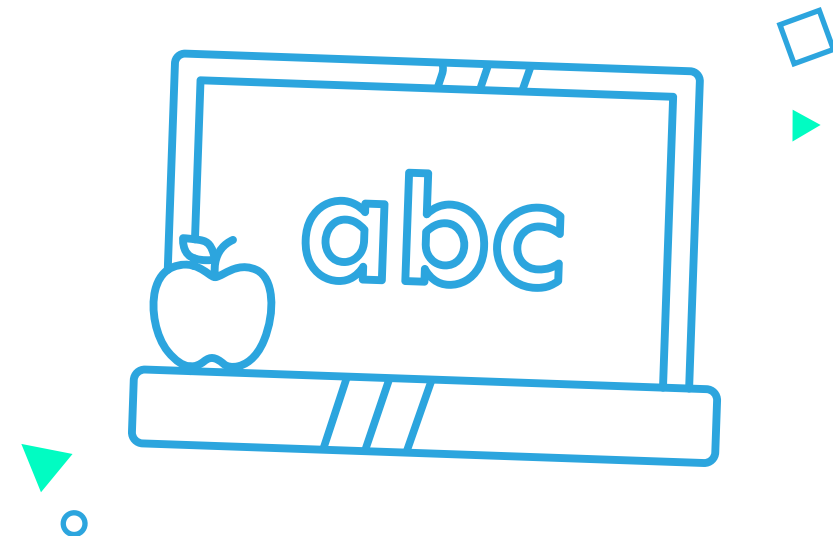
Inclusivity and diversity are elements that plenty of businesses, organisations, and government initiatives are prioritising, with younger generations more in tune with equal opportunities. Out of the four key generations surveyed, it was Gen Z (61%) who felt that the current education system doesn't cater to all.

Are Colleges and Universities Struggling to Keep Up?

As well as being more in tune with cultural issues, Gen Z are digital-first, with Google senior vice president Prabhakar Raghavan claiming in July 2022 that "almost 40% of young people" go to TikTok or Instagram for search purposes¹³. With young generations turning to social media as their primary search tool, it suggests that the preferred method of consuming content is through short, engaging videos. Do traditional institutions have a responsibility to keep up with the ever-evolving digital landscape? Perhaps the disconnect for young people is that traditional learning is yet to catch up.

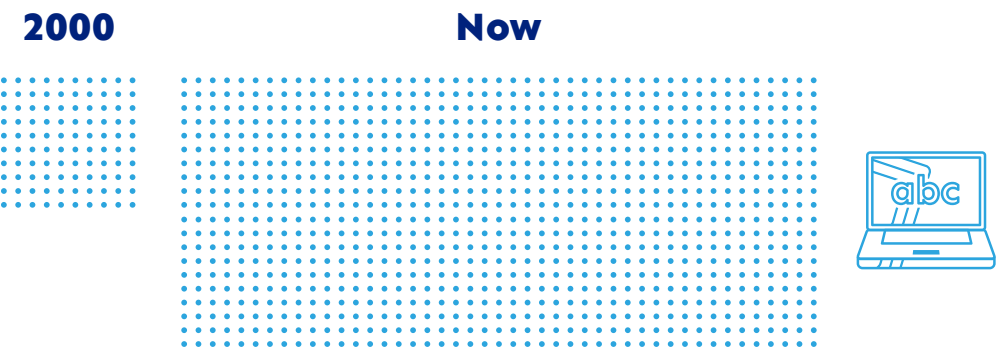
Older Generations Value Traditional Education

A portion of those who would have left mandatory education in 1980 or prior value the traditional methods, according to our research. 39% of Boomers believe that the education system still provides widespread opportunities to all. This is compared to 18% of Gen Z learners.



Traditional vs Digital

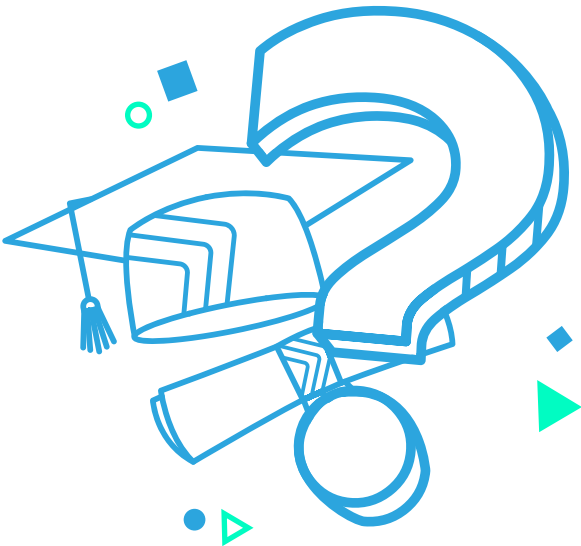
Research shows that the online learning market has grown 900% since the year 2000¹⁴, with more and more people relying on technology to develop their skill set and further their careers. Despite this, government-funded further education and skills participation for 19 years old plus rose by 4.8% from 2020/21 to 1,719,600 in 2021/22.¹⁵



This indicates that traditional classroom-based learning is still valued by many. In fact, 71% of our learners believe that classroom environments are still needed in education despite living in a digital-first society.

That being said, the traditional route of going to university is not as much of a priority as it used to be, according to 35% of our respondents, who believe that fewer people are interested in studying a degree.

Gen Z – the age range that would traditionally go to university post-secondary school – are among those questioning whether university is a favoured choice, with 57% surveyed claiming that interest is not as high in 2022.

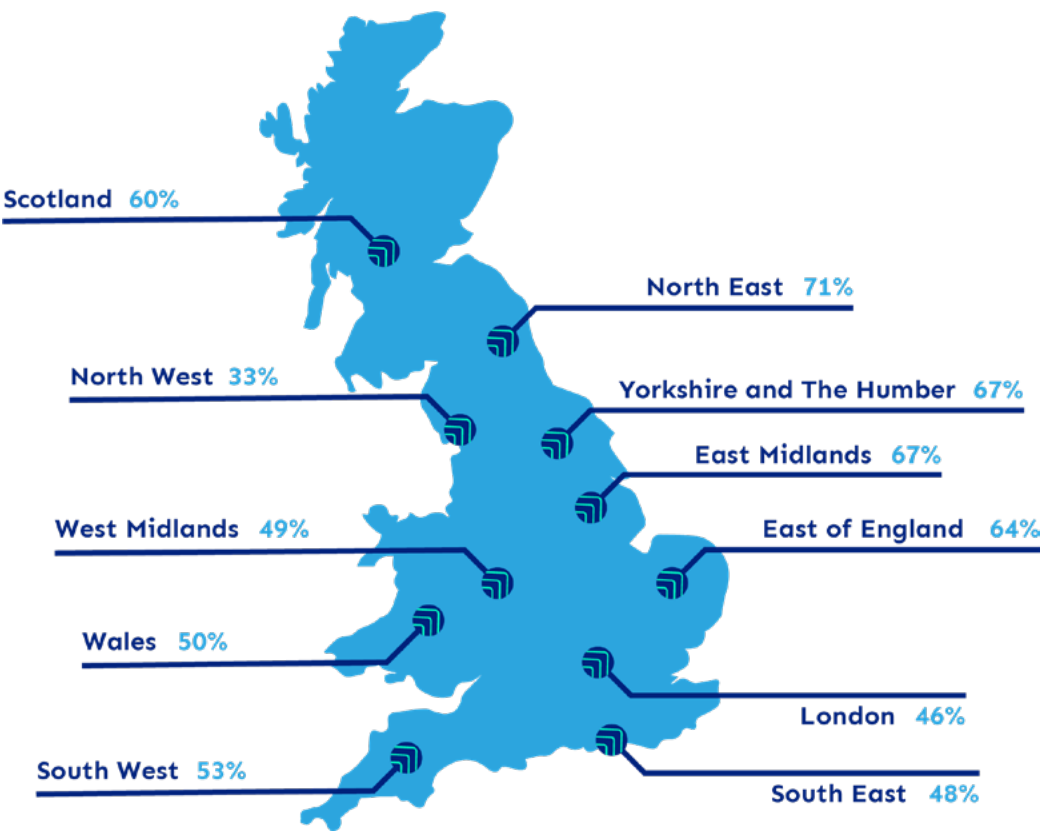
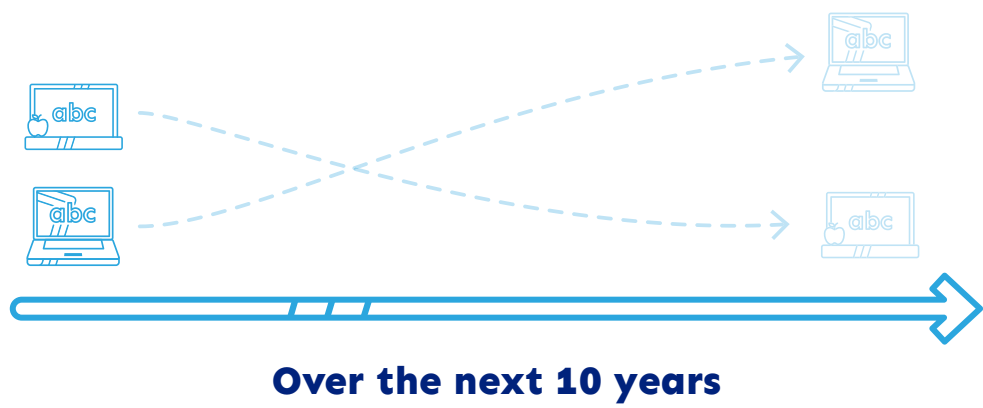


Online Learning to Overtake Traditional Education

More than half (52%) of respondents agree with the statement that online learning will surpass traditional education in the next decade, with 55% of surveyed Millennials and half (50%) of Gen Z learners believing that digital education is the future.

UK Regions Predict Learning Revolution

According to our research, there is widespread expectation from learners across the UK that the education landscape will change in the next 10 years, with online study taking over from traditional learning.



Key Recommendations

Focus on Life and Employability Skills

While academia is important to those who wish to pursue certain careers, it has been suggested that the current education system isn't preparing young people for life outside of the school corridors. With many qualifications being delivered online, there is scope to introduce more helpful courses that cater to this growing need for guidance.

Bring the Classroom to Learners

From our research, while the UK is ready to embrace the growth of online education, there are benefits to classroom learning. To satisfy this need while also catering to the digital demand, it is important to consider blending the two approaches, but in a digital-first manner.



Learning Lifestyle

45 Key recommendations



Learning Lifestyle

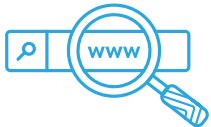
Understanding the motivations of the modern learner is essential to developing high-quality courses, but to enable a learning lifestyle that suits each individual, we need to know how people like to learn and consume their information. By surveying a group of learndirect customers, we were able to gather information about their learning preferences.



69% prefer to study on a laptop or a computer



84% would choose to study at home instead of a classroom



95% use Google to find out new information



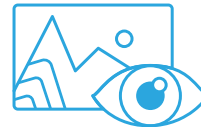
40% of learners surveyed rely on YouTube



Having the flexibility to learn at a time that suits them is the most important thing for **90%** of learners



27% prefer learning in the evening



22% need visuals to learn



38% like to study at various times of the day



24% consider themselves to be physical learners



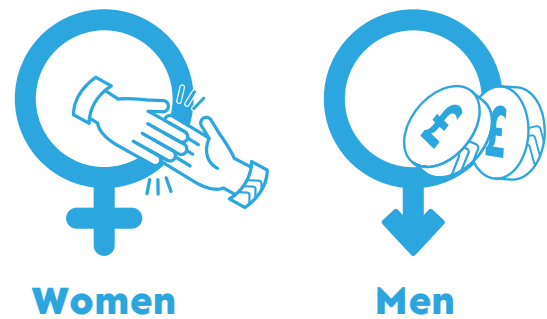
41% of learners prefer to study via an interactive online platform

The Gender Gap

More than half (57%) of men surveyed use social media – Facebook, TikTok, Twitter, LinkedIn, Instagram, Snapchat - to gain information compared to 46% of women.



Just under half of women (48%) surveyed noted tutor support as the most important aspect of online learning, while 55% of men valued affordability above all.



Key Recommendations

Interactive Content

As technology continues to develop, so does the manner in which we consume information. To keep up with the ever-changing digital landscape, it is important to create course content that can be digested in the same way that learners like to consume other information digitally.

Let's Get Physical

With a portion of respondents describing themselves as physical learners, it is worth considering how this need can be satisfied through digital means. Incorporating practical elements alongside the ease and convenience of online learning will tick both boxes.

Dyslexia Support

Just over a quarter (26%) of learners surveyed with a learning disability stated that they needed support for dyslexia. Over 6 million individuals in the UK have dyslexia, with many of those never having been officially diagnosed.¹⁶ To make the learning process more digestible and therefore accessible to dyslexic individuals, assistive technologies can be introduced to support, while assigned tutors can also implement techniques that makes the learning journey easier.



Conclusions

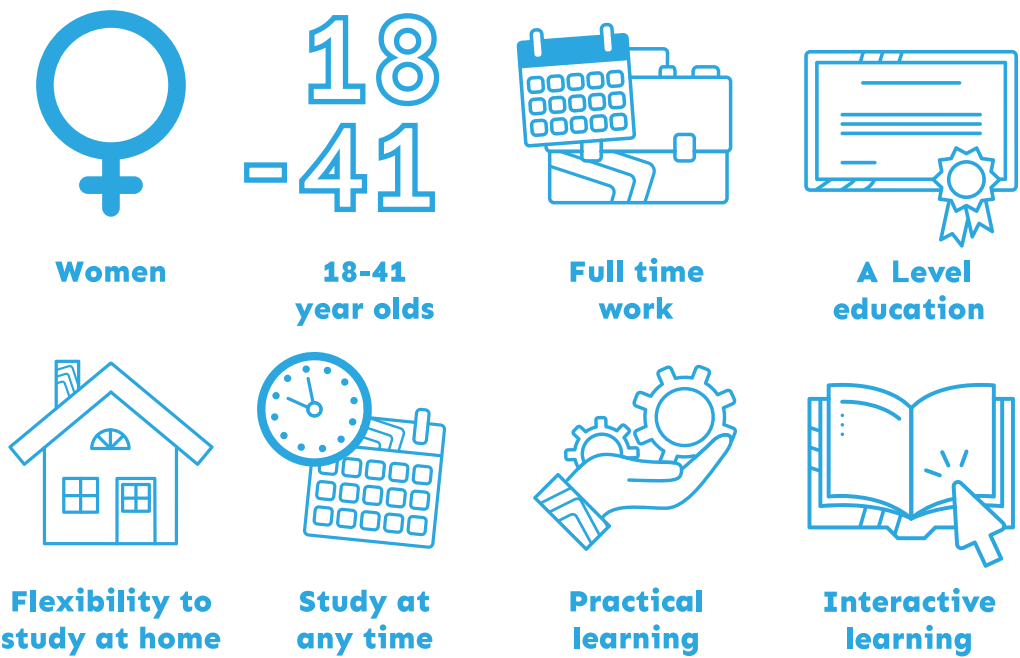
The purpose of our research was to get into the minds of those who have chosen online learning; delve into the reasons why they took this road, what they hope to get out of it, how they feel about the current education system, and whether external factors have influenced or affected their decision-making process. With this data we have been able to make a fair assessment on the modern learner landscape and have identified key findings that can help shape the future of learning.



A Modern Learner Profile

Our research suggests that more women than men are inclined to study online, with 18 to 41-year-olds being the broad age demographic. Being in full-time work is a common trend for learndirect customers, with many educated to at least A Level standard.

Having the flexibility to study online from the comfort of their own homes at a time of day that fits into their schedules is essential for most learners. This gives them control over their learning journey, banishing the restrictions of timetables and classrooms. Interactive elements are important to our learners, with a handful revealing that they like to be hands-on when learning a new skill, suggesting that a balance of online and practical learning is favoured.

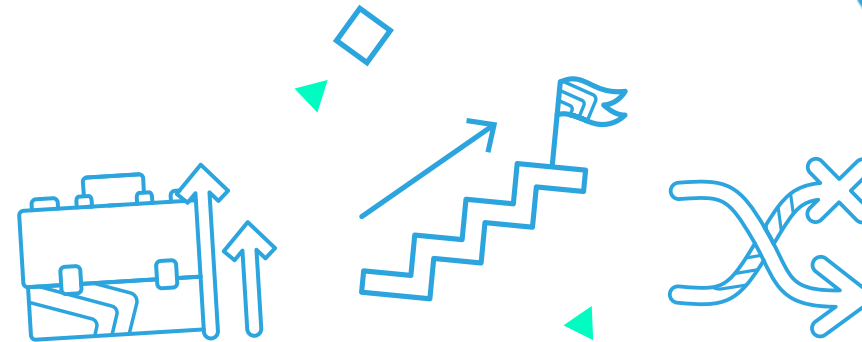


Multiple Motivations

Out of the learners surveyed, there is not one clear purpose driving the desire to study online. There are multiple reasons, including the want to change career. The flexibility and accessibility of online learning means that individuals of all ages have an opportunity to alter their career path while remaining in their existing job.

There is no need for individuals to put themselves in the precarious position of quitting their job and then training for a new one, as they can do the training while working full-time, such is the flexibility of online learning.

While starting a new career is a key driver for some of our learners, there are plenty who are looking to take the next step in their existing career. Moving up the ladder and upskilling in their respective roles is a motivating factor in studying online, particularly as evidence shows that upskilling opportunities are not always offered in-house.



Education is a Route Out of Economic Strife

With the rise in cost of living affecting households across the UK, our research shows that people are still investing in education. Affordable payment plans have removed the cost barrier, while many believe that getting qualified now will put them in a stronger position in the job market once the economy bounces back.



Digital Learning is the Future

Many of our learners believe that online learning will surpass the traditional bricks and mortar style of education within the next decade. The current education system is also under scrutiny, with our research suggesting that learners of varying ages, but predominantly Gen Z, don't believe that it caters to everyone. Despite this, there is still an argument for traditional learning, with our research showing that classroom environments are still valued.

With this knowledge, we can continually develop an online education space that caters to the needs and wants of the evolving learner.



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