Future Learn

The Future of Learning Report

February 2021

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Contents

Methodology + sources

FutureLearn commissioned YouGov to undertake a global study to explore the future of learning. This report includes survey data from the UK, USA, and Australia, qualitative interviews with 15 experts as well as data from FutureLearn and it's co-investor, Australian jobs board, SEEK.

Future Learn

Our mission is to transform access to education

Matt Jenner
Director of Learning, FutureLearn

> " Our learning is infinite.
> The skills we need are lifelong.
> #ThisIsFutureLearning "

Since we started FutureLearn with The Open University eight years ago, we were pioneers in social learning. Now, with the addition of our co-investor SEEK, we continue to grow in new ways and enable our learners to truly harness the transformative power of education.

Thanks to our global network of almost 250 partners, we're committed to producing a rich selection of courses offering learners the skills and knowledge needed to unlock their potential in rapidly-growing industries.

Everyone deserves access to education. Thanks to our increasingly connected world, even more of us can access high-quality education from home, with data and devices more widespread and affordable than ever before.

So what does the future of learning look like?

At FutureLearn, we continue to pursue our mobile-first strategy, making offline learning a top priority and ensuring our user experience is universally accessible. Powered by our world-class university and industry partners, we're always working to produce a broader selection of free and open courses – for anyone, anywhere.

Learning is for life, and life can sometimes get complicated. We're building more routes into education, giving learners the option to progress their career, explore a new industry, or simply learn for fun. From standalone courses to learning pathways, the content is interesting but challenging and focuses on developing knowledge and in-demand skills. Every learner builds their personal study journey by choosing courses that are meaningful to them, their career, and their future.

Education is a shared experience. We want to connect more people so they can learn together. We don't want a world of studying alone. Instead, we want to connect learners and broaden their perspectives to include new cultures, approaches, experiences, feelings and concepts. This passion for collaborative learning is deeply ingrained in our courses as it powers positive interactions, experiences, and results. The future of learning is togetherness – global learners in a global society.

Of course, we all share significant challenges. But education helps us to fix them – it equips us with the tools we need to make our world a better place. That's why we want to continue partnering with amazing organisations and universities, creating inspiring content, and helping as many learners as possible to make their future goals and dreams a reality.

Our learning is infinite. The skills we need are lifelong. **#ThisIsFutureLearning.**

Global Learning Trends

From generational differences to changing expectations, our key findings from across the UK, USA, and Australia shine a light on a range of global trends surrounding how and why people learn.

Women trust education

TREND 1

Women are statistically more likely to take an online course than men, and more women believe that education has the power to make the world a better place.
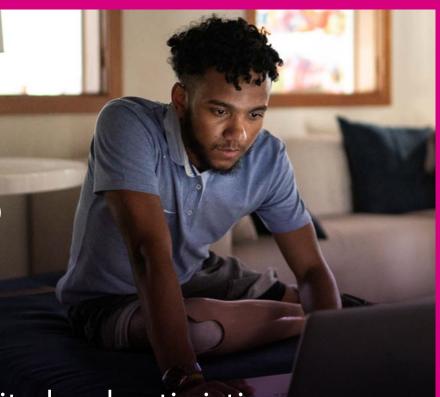
Brits falling behind

TREND 2

People in the UK are shown to be falling behind their American and Australian counterparts in both the adoption of online learning and positive attitudes towards it.

Gen Z leads the charge

TREND 3

Younger generations show the most interest in online learning, as well as the greatest trust and belief in the power of education to have a positive impact on our world.

Inclusivity is on the up

TREND 4

Respondents are excited and optimistic about inclusive education, and our experts agree real progress is being made towards the accessibility and inclusivity of learning.

Young people mobilising on social media

TREND 5

Young people trust in, and use, social media platforms to educate themselves generally as well as specifically on current affairs and political movements like Black Lives Matter and LGBTQIA+ rights.

Online is the new normal

TREND 6

Data shows online learning is becoming the norm. Experts agree that although digital learning uptake was accelerated by COVID-19, its popularity is here to stay.

Professionals want a career boost

TREND 7

Online learning is particularly valuable for those 'locked out' of opportunities due to poor qualifications. People are likely to take an online course to get ahead at work.

No more 'jobs for life'

TREND 8

People expect to change jobs and industries throughout their career. This is a trend rather than a skills gap and is heightened by the post-COVID-19 jobs landscape.

Wider range of qualifications accepted

TREND 9

There is now a wider acceptance of different types of qualifications such as microcredentials due to current formal qualifications not matching industry expectations and skills demand.

Self-development sweeps the board

TREND 10

Across all countries, people show the most interest in developing their knowledge around mental health and mindfulness over the next five years. This is followed by nutrition, diet, and physical health.

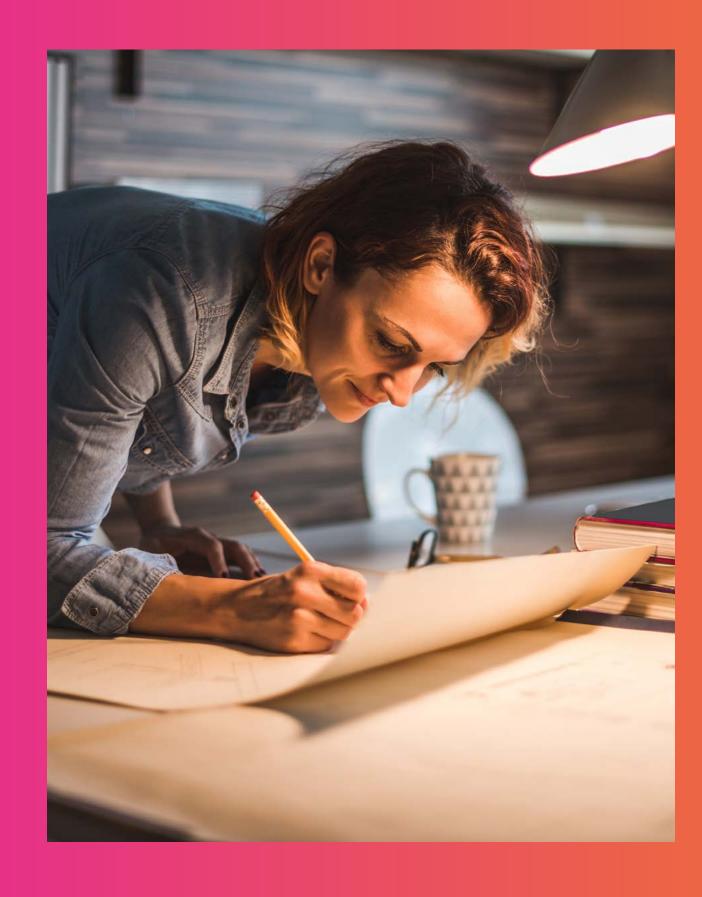**The future of learning looks bright.** Read on for a detailed exploration of gender, diversity and inclusion, the impact of COVID-19, perceptions of online learning, and much more.

Join the conversation
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This is independence.
This is choice.
This is access.
This is collaboration.
This is power.
This is tomorrow.
This is opportunity.
This is learning.

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"With areas like engineering, pharmacy, accounting, and architecture, we're seeing more women now go into those areas because we've campaigned about it."

Ranata Hughes *Florida A&M University*

Spotlight on
Women + Learning

Gender, education and the future

Women trust education

Our study shows that, overall, women demonstrate higher trust than men in the power of education to improve diversity and inclusion around the world. 45% of women (compared to 39% of men) report that they think education in the future will have the power to reduce violence and make the world a more diverse and culturally accepting place.

Likewise, close to two-fifths (39%) of women think that future education will have the power to end inequality, compared with a third of men (33%).

Women also have greater confidence in the future inclusivity of teaching than men. Over two-fifths (45%) of women across the three countries surveyed think that education will use more inclusive teaching methods in the future, compared with 38% of men.

Possibly as a result of this, women are somewhat more likely than men to predict that education will be more accessible for people with disabilities in the future (51% compared with 47%).

Gender, diversity, and inclusion

Differing perceptions of diversity and inclusion are also evident in relation to online learning.

Women are more likely than men to agree that online learning allows for more diversity and inclusion in the education sector (49% compared with 45%).

47% of women, compared to 40% of men, think that online learning offers the privacy some people need to study subjects that they would not feel confident taking in person.

Interestingly, FutureLearn saw more women than men (55% to 44.5%) enrolled on science, engineering and maths courses in 2020.

Additionally, FutureLearn has seen almost a 350% increase in enrolments in tech and coding courses from 2019 to 2020, and in 2020, over half of those enrolments were women.

Close to two-fifths (38%) of women believe that women around the world have more access to education as a result of online learning, compared with 30% of men.

This proportion increases among women who believe that the privacy of online learning enables people to feel more confident. Over half (56%) of women in this group say that women around the world will have more access to education as a result of online learning, which is higher than the proportion of men (50%) who support this statement.

45%
of women believe education has the power to lessen violence

23%
of women plan to take an online course to better understand cultural issues

2 in 5
women believe online learning will improve women's access to education

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Individually tailored learning is a crucial benefit to women

Individually tailored learning is a crucial benefit of online learning in the eyes of women. Women are significantly more likely than men to identify being able to learn at your own pace as a benefit of online learning (62% compared with 50%).

Similarly, over two-fifths (45%) of women believe that being able to learn at your own pace increases self-esteem when learning online – again a significantly higher proportion than among men (39%).

Across all three countries surveyed, women (42%) are more likely than men (35%) to identify structured online learning – where they are guided but can learn at their own pace – as a way of learning best suited to them.

Findings also show that women are especially interested in using online learning for personal development, with women showing an increased likelihood of taking an online personal development course (40% of women versus 35% of men).

When it comes to using social media to stay on top of current affairs, women generally use Facebook, Instagram, and TikTok more commonly than men to learn about diversity and inclusion (20% vs 14% Facebook; 16% vs 9% Instagram; 6% vs 3% TikTok), social justice (19% vs 15% Facebook; 14% vs 8% Instagram; 5% vs 3% TikTok), and environmental sustainability (17% vs 14% Facebook; 13% vs 8% Instagram; 4% vs 3% TikTok).

Women are also more likely than men to take an online course in the next five years in order to stay on top of cultural issues (23% versus 20%).

23%   **20%**

Likelihood to use an online course to stay on top of cultural issues in the next five years

DID YOU KNOW?
Women are 5% more likely than men to take an online course for personal development

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"The idea that we go from 16% of English Computer Science graduates identifying as female, to 46% of our learners identifying as women on online courses suggests that there are groups for whom online courses are a better option."

Dr Rachid Hourizi Director, Institute of Coding

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Spotlight on
Generational distinctions

"The next generation's educational future is going to be full of technology. Technology they're going to need to come out of high school knowing how to use in order to go into college and be successful."

Ranata Hughes Florida A&M University

Millennials and Gen Z believe education can change the world

Change is possible

Overall, younger people are more likely than their elders to believe that education can change the world.

A significant proportion of younger people (47% of Millennials and 50% of Generation Z, compared with 40% of older generations) believe that in the future, education will have the power to help save the planet.

Likewise, close to three-fifths of younger people (56% of Millennials, 57% of Generation Z) believe that education can help develop technology to create a sustainable future, compared with just under half of older respondents (48%).

Among younger generations, there is a greater belief that in the future, education will directly empower people to solve the world's biggest issues, such as the climate crisis, environmental and corporate sustainability, and human rights.

Generation Z (47%) and Millennials (45%) are the generations most likely to hold this conviction, compared with just under a third (32%) of older participants.

Clear future demand for EdTech

Younger people have a larger appetite for educational innovation. Both Millennials and Generation Z are more likely than older generations to be interested in seeing different forms of education technology emerge by 2030, with the exception of virtual reality, which is roughly equally desired by all (39% of Millennials, 38% of Generation Z, 35% of older generations).

Technology such as augmented reality is also significantly more popular with younger age groups, with over a third of Millennials (35%) and three in ten from Generation Z (30%) selecting augmented reality as their preferred form of educational technology, compared with just under a quarter (24%) of older respondents.

Likewise, younger generations are more interested in seeing educational features on social media platforms, with three in ten (30% of Millennials, 29% of Generation Z) reporting they would like to see this technology, compared with just under a fifth (19%) of older respondents.

56%

of Millennials believe education has the power to develop technology that creates sustainable communities

50%

of Gen Z's believe education has the power to save the planet

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Differing attitudes to self-education

Age has a significant bearing on whether someone has already used some form of digital platform to learn.

Millennials and Generation Z are more likely to have used most social media platforms for an educational purpose[1]. For example, 24% of Generation Z and 15% of Millennials use Twitter to educate themselves about environmental issues, compared with just 6% of those in older generations.

Likewise, Instagram is used as a tool to self-educate on diversity and inclusion by 37% of Generation Z and 22% of Millennials, compared with just 4% of people from older generations.

Gen Z versus Millennials

Interestingly, Millennials are somewhat more likely to say they prefer structured online learning – where they are guided but can learn at their own pace – compared to Gen Z (41% versus 37%).

Both younger generations show a preference for learning through social interactions online, with 15% of Millennials and 16% of Generation Z reporting that they are well suited to this style of learning.

Overall, Millennials have a positive attitude towards online learning. One in five (21%) strongly agree that it can provide similar benefits to formal education, which is slightly higher than Generation Z (18%) and adults in older generations (14%).

Similarly, Millennials (51%) are somewhat more likely than Generation Z (46%) as well as people from older generations (45%) to agree that online learning allows for more diversity and inclusion in the education sector.

1 in 5

Millennials strongly agree that online learning can provide similar benefits to formal education

3 in 10

Millennials & Gen Zs would like education features on social media

[1] Respondents were asked about digital platforms and education on environment and sustainability, social justice, and diversity and inclusion.

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Generations and the future of learning

Younger adults generally show the most interest in gaining new knowledge.

Millennials (12%) and Generation Z (8%) are significantly less likely than older generations (32%) to report that there are no subject areas they would like to learn about in the next five years.

Across all who were surveyed, education on mental and physical health is a priority, though this response is largely driven by the younger age groups.

Close to two-fifths of Generation Z and Millennials cite mental health and mindfulness (41% of Millennials, 42% of Generation Z) and nutrition/diet/physical health (36% of Millennials, 43% of Generation Z) as their preferred learning topics.

However, for these groups, managing personal finance is most commonly identified as an area they are interested in learning more about; with just over two-fifths (41%) of Millennials and just under half (47%) of Generation Z reporting this compared with just 21% of older generations.
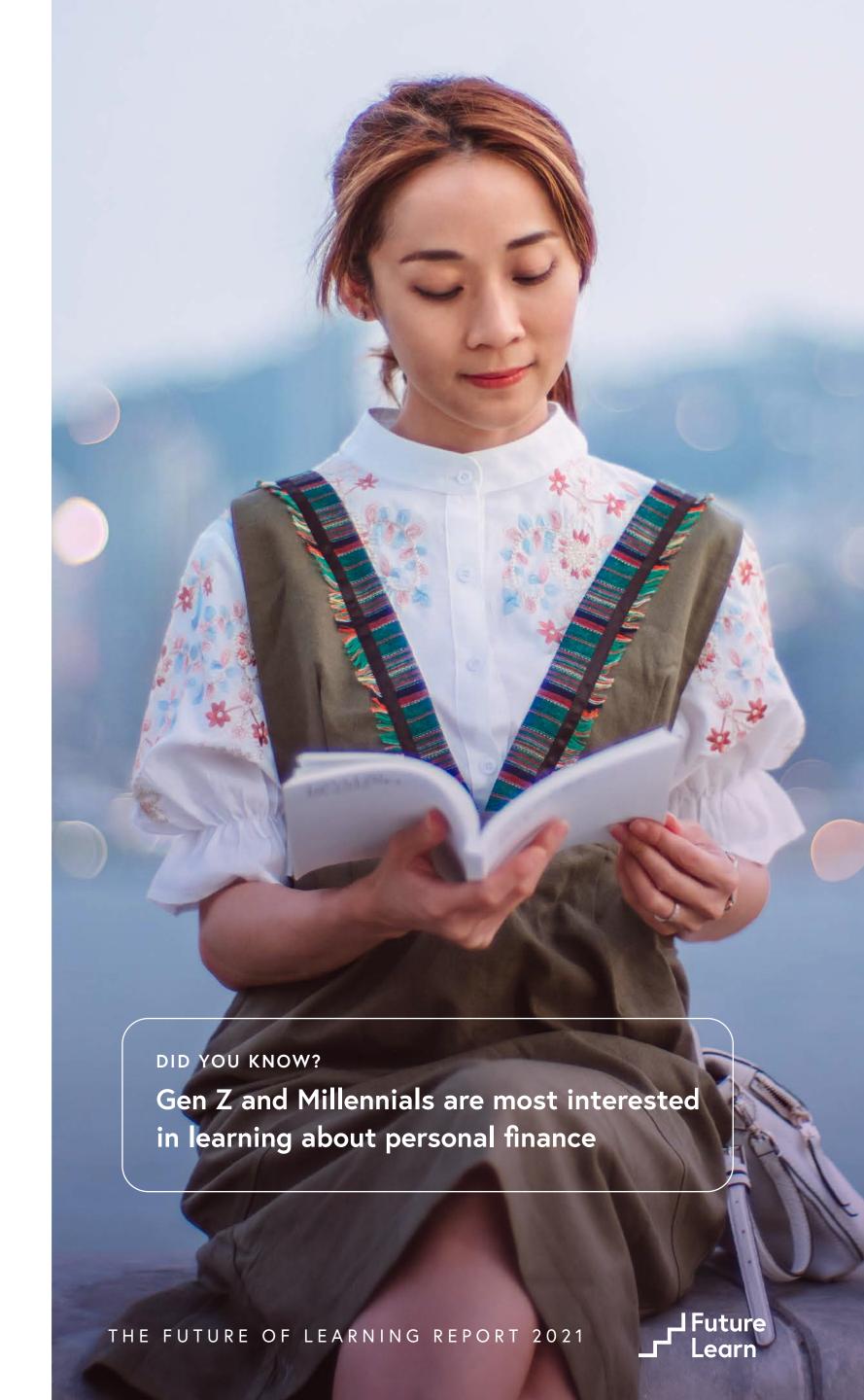
Motivations for learning

Millennials and Generation Z are most likely to use online courses for personal development in these areas in the next five years.

Half of Millennials and Generation Z say they would be likely to take an online course for self-development. This compares to 29% of those belonging to older generations.

Moreover, younger people are the most likely to agree that they would take an online course in the next five years for career development. Generation Z are most likely to agree with this (60%), slightly higher than Millennials (53%) – although both groups still show a significantly higher interest than older respondents (33%).

Similarly, Millennials and Generation Z (both 34%) are more than twice as likely than the older non-retired generations (16%) to say they'd consider spending time or money on career-related training.

DID YOU KNOW?
Gen Z and Millennials are most interested in learning about personal finance

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The impact of COVID-19

The COVID-19 pandemic has made younger age groups more interested in starting an online course.

Close to two-fifths of both groups (42% of Millennials, 39% of Generation Z) report that they are more interested in learning online since the pandemic, compared to 23% of those in older generations.

This could be a result of the impact of the pandemic on their career, with 15% of both groups reporting that they have re-evaluated their career path as a result of COVID-19, compared with 8% of older generations who are not retired.

Likewise, just under one in ten younger people (8% of Millennials, 7% of Generation Z) have said they have had to move into a new industry and have required new skills to do so because of the pandemic. This is significantly higher than those in older generations (3%).

15% of Gen Z and millennials have re-evaluated their career since COVID-19

Entrepreneurship

Close to two-fifths of the younger generations (43% of Millennials, 39% of Generation Z) report that they would like to set up their own business in the next ten years. This is again significantly higher than older respondents (19%).

Of those who are interested, a similar proportion report that they lack the confidence (41% of Millennials, 43% of Generation Z) to do so. Younger respondents are significantly more likely to doubt their skills compared with older generations (37% of Millennials and 42% of Generation Z versus 24% of older generations).

However, there is greater enthusiasm among younger age groups to educate themselves in these areas. Of those who are employed, Millennials (29%) and Generation Z (28%) are significantly more likely than older employed adults (15%) to say that they are likely to take an online course in the next five years to help them start their own business.

41% of Gen Z who would like to set up their own business, say that they lack confidence to do so

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" I went to university at 18 and I've never left. That's not going to be a common career path in the future with the pace of acceleration of technological change. I think for the younger generation now, what good secondary education can give them in the UK is the ability to learn how to learn, learn how to change, and learn how to understand new opportunities. "

Professor Josie Fraser Deputy Vice-Chancellor, The Open University

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"Once online learning becomes more accepted as the new normal as the world changes, and as technology makes it cheaper, faster, easier, I hope that we have deeper, richer conversations and still ask, who is missing from this class?"

Sara Ali *The Hopenclass*

Spotlight on
Access + Inclusion

Optimism around education for all

Access to education

People across all three countries surveyed show considerable optimism about the accessibility of education in the future.

Over half of Australian adults (54%) and two-fifths of those in the UK and USA (42% respectively) believe that global access to education will increase in the future.

Improved inclusivity is central to respondents' predictions for the future of education, with close to two-fifths of respondents saying that education will use more inclusive teaching methods in future (46% Australia, 41% UK, 39% USA).
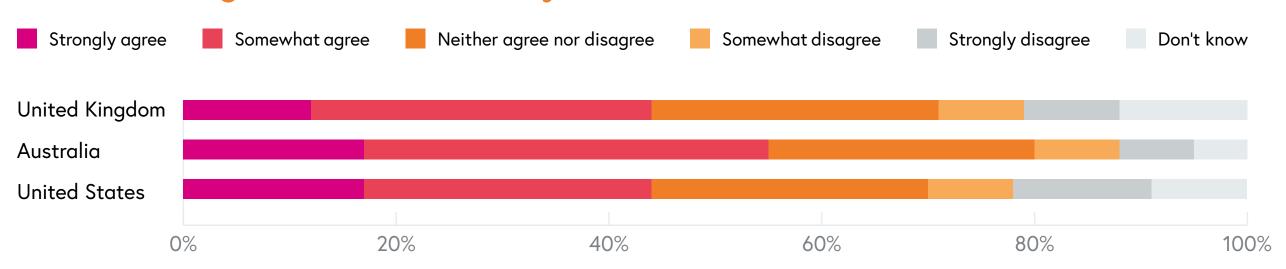
Many adults across the three countries also think that education will be more accessible and better for people with disabilities (55% Australia, 47% UK, 46% USA), as well as being more individually tailored to people's interests (47% Australia, 33% UK, 38% USA).

Alongside improved accessibility within the education sector itself, many believe that education will develop inclusion globally. Almost two-fifths of Australian (38%) and UK (37%) adults believe that education will have the power to end inequality, and three in ten (32%) American adults.

Likewise, nearly half (46%) of Australian adults believe that education can make the world a less violent, more diverse, and culturally accepting place, followed by 42% in the UK and 37% in the USA.

Looking specifically at online learning, notable proportions of the public in the UK, USA, and Australia believe that it allows for more diversity and inclusion in the education sector – 55% of Australians, 44% of Brits and 45% of Americans.

Online learning allows more diversity and inclusion in the education sector

■ Strongly agree   ■ Somewhat agree   ■ Neither agree nor disagree   ■ Somewhat disagree   ■ Strongly disagree   ■ Don't know

	0%	20%	40%	60%	80%	100%
United Kingdom						
Australia						
United States						

42%

of Britons believe education has the power to make the world a more diverse, culturally accepting place

55%

of Australians believe access to education will improve for people with disabillities

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Understanding digital poverty

We also discussed the subject of diversity and inclusivity in interviews with educational experts. who offered professional insight into the future of education.

For most, the ability to use online or blended learning allows people from marginalised or minority communities more access to learning. They agreed that it also allows more women to join courses that lead to careers in male-dominated areas. They believe this is because, in an online setting, the vulnerability that comes with seeing there are no other people 'like them' on the course is reduced.

Chief Strategy Officer at Droga 5 and MD at Accenture, Dylan Williams, hopes online learning can serve to democratise education: "I hope it proves to be the next big wave of education".
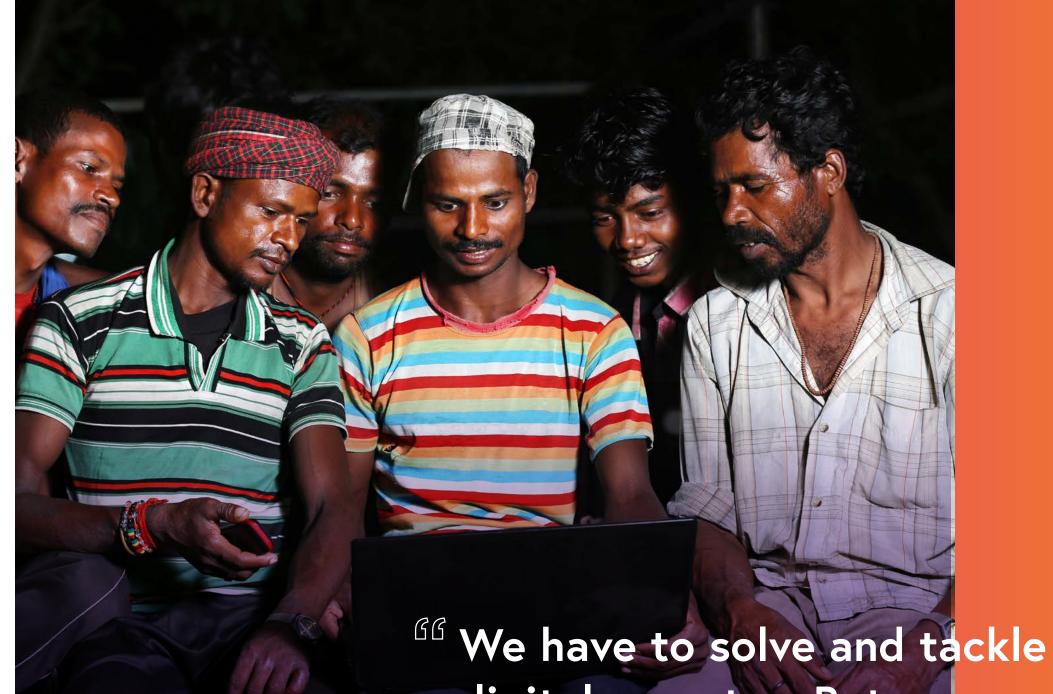
Diana Laurillard, Professor of Learning at University College London's Knowledge Lab, was adamant that online learning could pave the way for hybrid degrees, which would give international students who are unable to afford the cost of living in London access to education at UCL.

However, although online learning removes constraints like geographical barriers, it still requires learners to have the technology to participate. Students' willingness to learn online is also in question, with much more outreach required.

Patricia Davidson, Dean at Johns Hopkins University, believed that both educational leaders and policy makers should be working to reduce the disparities between different ethnic and racial groups and socioeconomic statuses, as well as the differences between low, middle, and high income countries. She explained, "We have to make sure that digital innovation and acceleration does not widen this disparity."

Rebecca Hall, Commissioner for Victoria to South East Asia, felt that we would, "need to design policies and programs that ensure that access is available."

Maya Penn, CEO of Maya's Ideas, and an entrepreneur who is passionate about access to education, talked a great deal about the existing digital divide and how COVID-19 is highlighting these issues and felt that it needed to be "a number one priority" to figure out how to make technology and online learning accessible.

> **We have to solve and tackle digital poverty…But once you do that and you make education more technologically mediated, you massively increase diversity.**
>
> *Professor Josie Fraser The Open University*

Diversity of thought

For other experts, diversity is much more about diversity of thought. This includes those with diagnosed conditions who are perhaps not well suited to conventional methods of teaching.

Many of the experts interviewed were interested in the possibility that digital channels could open up greater diversity in terms of learning techniques, affording all students the opportunity to engage.
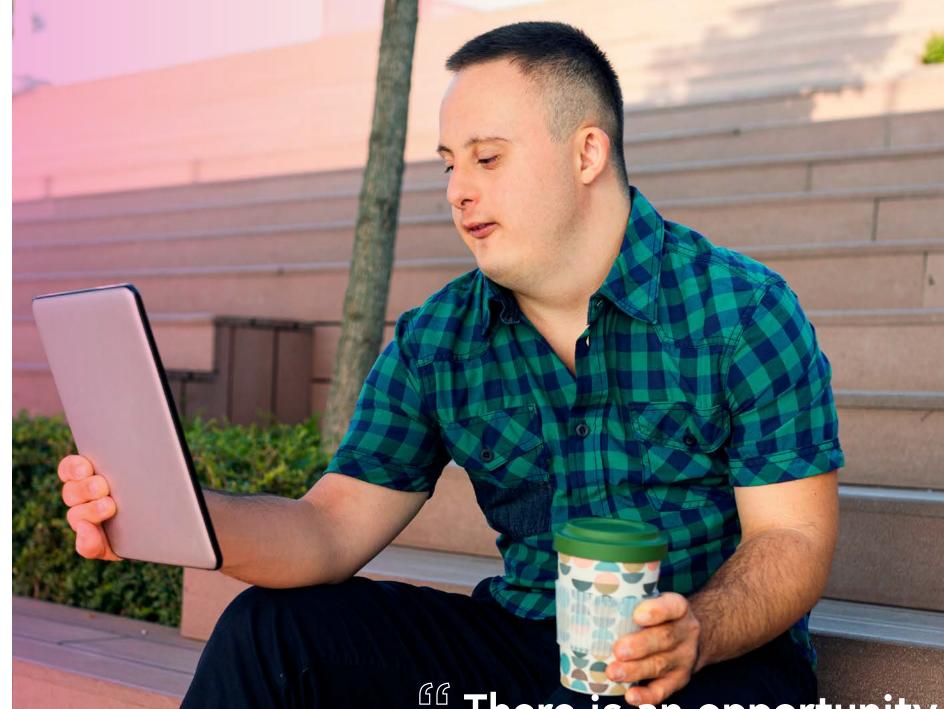
Senior Vice President and Head of Innovation at VICE, Mark Adams, believes that, currently, education systems don't account for this neurodiversity: "We don't have different learning paths... I think they would be a really powerful unlock for our education system."

37% of UK adults believe that education will have the power to end inequality

54% of Australians believe future education will be easier to access globally

"There is an opportunity for us to better educate everybody in a more sensitive way... understanding how different people innately think and advancing different approaches accordingly."

Dylan Williams Droga 5

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"There are opportunities for us to do even better at supporting diverse communities. I don't inherently believe that it's just the online divide, I think that it's a question of our innovative and intentionally inclusive pedagogy to achieve that."
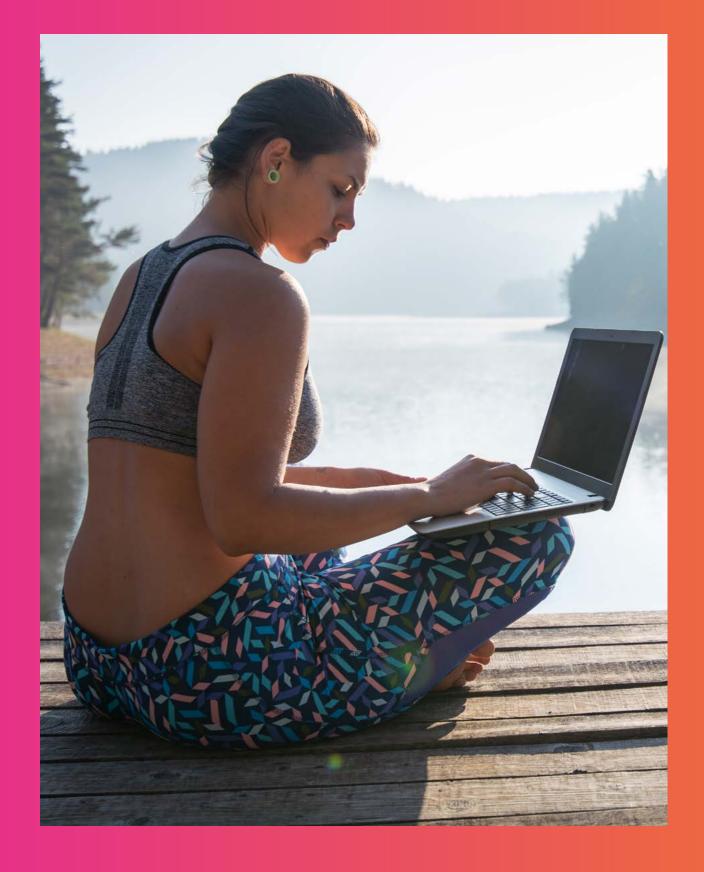
Dr Caitlin Hayward Associate Director, University of Michigan

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Self-education + social media

"There are some who would argue we are in the post-digital world, so we need to lose the term digital. It's just the world we live in."

Professor Mark Brown *Dublin City University*

The state of the world

Tools for learning

Findings from this research indicate that people in the UK, USA, and Australia use a variety of digital platforms to educate themselves about the state of the world, but a significant proportion are not self-educating through any platform at all.

Although many respondents said they don't use any digital platforms to educate themselves on environmental sustainability, overall, the two platforms most commonly mentioned for doing so are YouTube and Facebook. Twitter and Instagram are most popular for self-education among adults in the USA.

People in Australia and the USA are more likely than those in the UK to have used YouTube (24% Australia, 13% UK, 20% USA) and Facebook (21% Australia, 12% UK, 19% USA) for self-education, but are equally likely to be using Twitter (10% Australia, 11% UK, 12% USA).

21% Australia
12% UK
19% USA
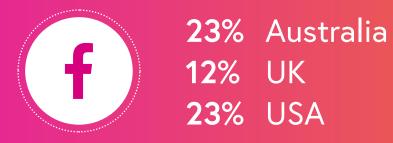
24% Australia
13% UK
20% USA

10% Australia
11% UK
12% USA

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A very similar story is seen when we look at the digital platforms people use to educate themselves about social justice. The most commonly used platforms were:

23% Australia
12% UK
23% USA

20% Australia
11% UK
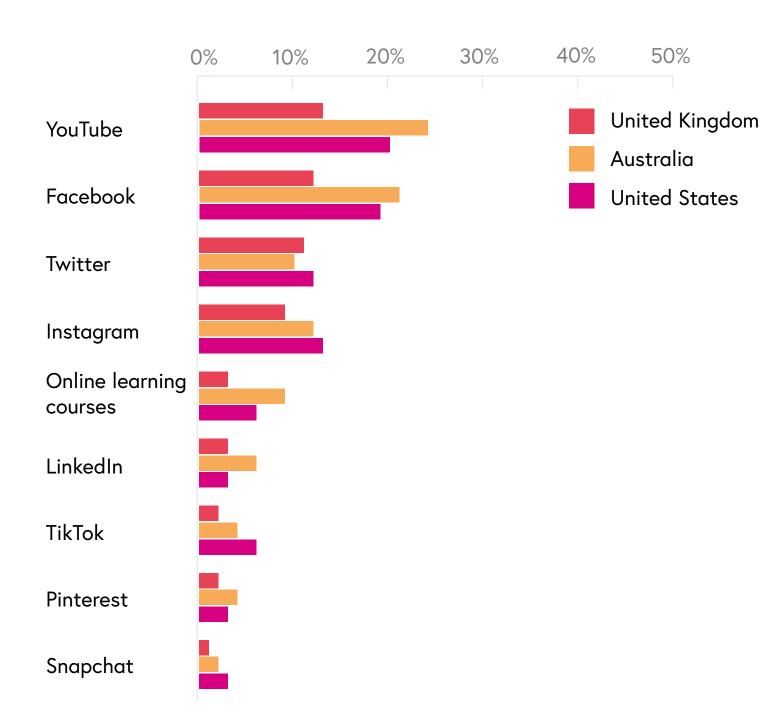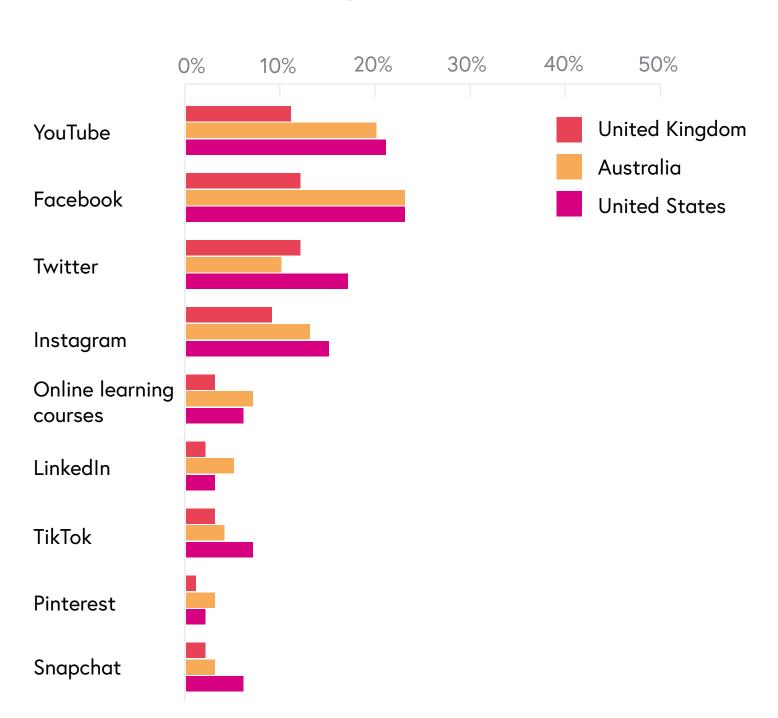**21%** USA

10% Australia
12% UK
17% USA

YouTube, Facebook and Instagram, for learning about social justice, is higher in Australia and the USA than in the UK. Meanwhile, UK adults (54%) are more likely than those in Australia (43%) and the USA (39%) to say that they have not used any digital platforms to educate themselves about social justice.

Digital platforms used to educate about environment and sustainability

United Kingdom
Australia
United States

YouTube	
Facebook	
Twitter	
Instagram	
Online learning courses	
LinkedIn	
TikTok	
Pinterest	
Snapchat	

Digital platforms used to educate about social justice

United Kingdom
Australia
United States

YouTube	
Facebook	
Twitter	
Instagram	
Online learning courses	
LinkedIn	
TikTok	
Pinterest	
Snapchat	

Exploring social issues

We also asked respondents about which digital platforms they use to educate themselves about diversity and inclusion, which was defined to include topics such as gender history, Black Lives Matter, LGBTQ+ rights and the gender pay gap.

The results paint a very similar picture to that of the platforms being used for self-educating about environmental and social justice issues.

As seen previously, the top two digital platforms used in Australia and the USA are Facebook (21% Australia, 23% USA) and YouTube (20% Australia, 19% USA). Although UK adults are less likely to have used these (12% for both), they remain the platforms most commonly used in the UK, alongside Twitter (also 12%).

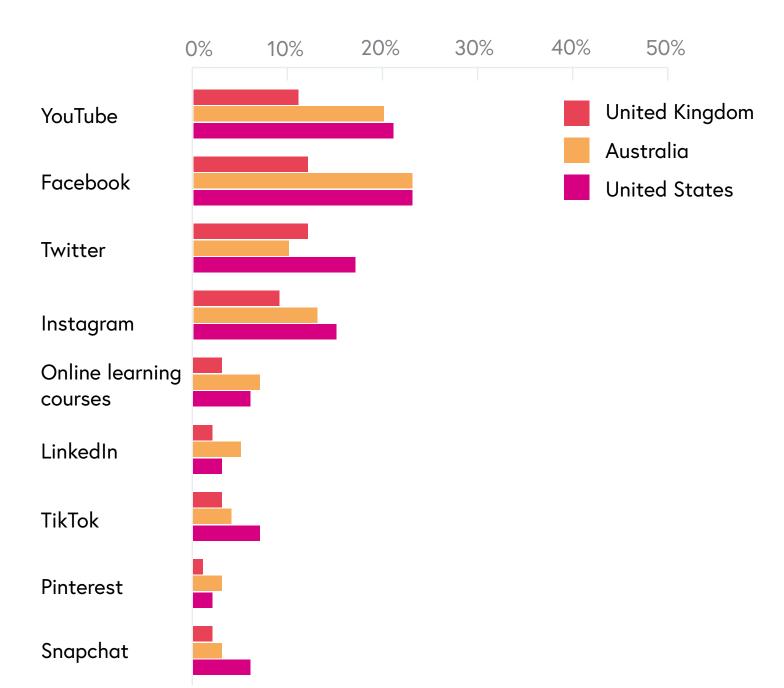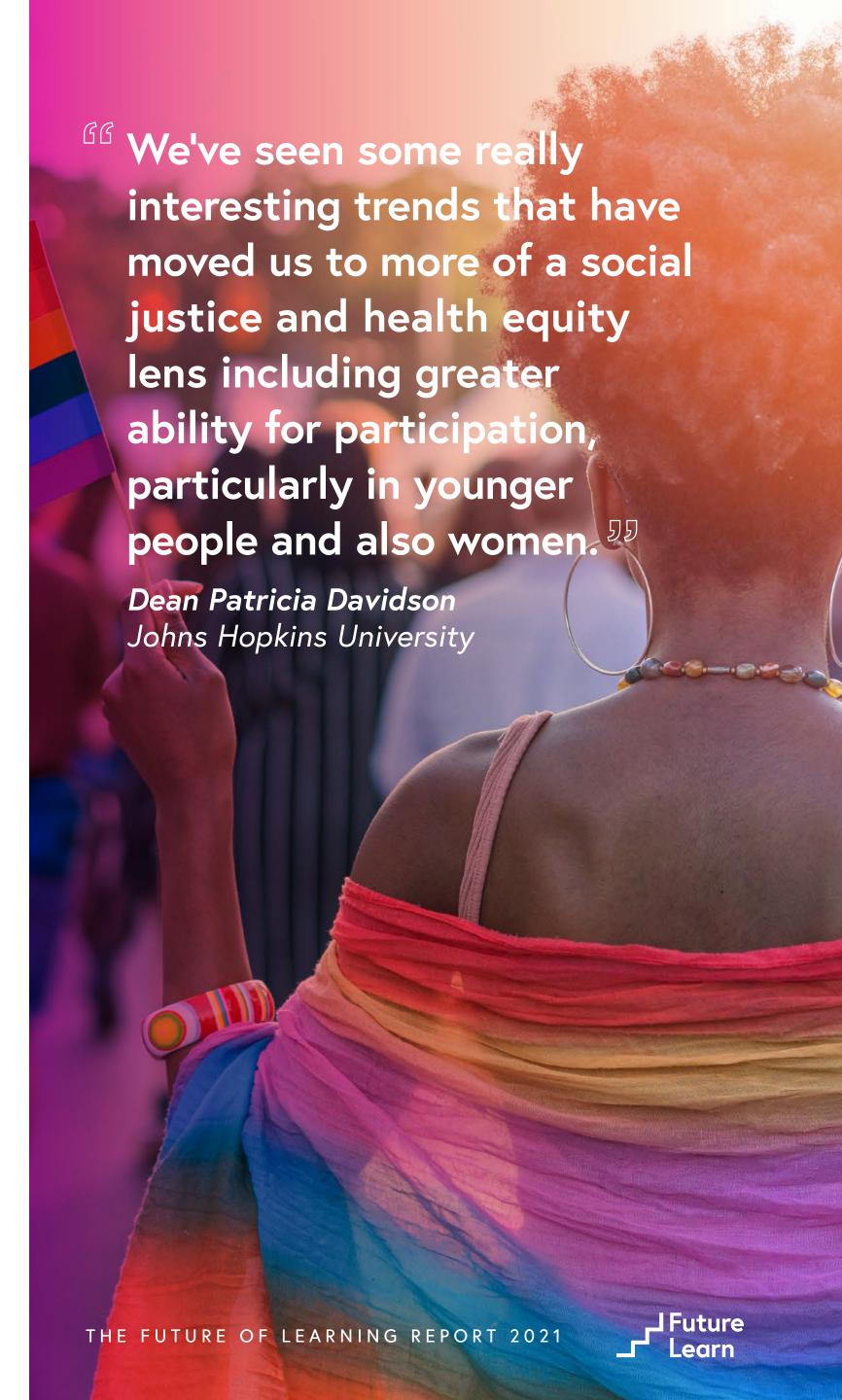### Top social platforms to learn about social issues

21% Australia
23% USA

20% Australia
19% USA

Digital platforms used to educate about diversity and inclusion

Legend:
- United Kingdom
- Australia
- United States

Categories: YouTube, Facebook, Twitter, Instagram, Online learning courses, LinkedIn, TikTok, Pinterest, Snapchat

> " We've seen some really interesting trends that have moved us to more of a social justice and health equity lens including greater ability for participation, particularly in younger people and also women. "
>
> *Dean Patricia Davidson*
> *Johns Hopkins University*

FutureLearn

"What we're doing with online learning is we're basically letting people learn in their own time and at their own pace. And I think there's something so powerful about that. And that's one of the things I love about FutureLearn, is that it really dismantles time and place as barriers."

Mark Adams VICE

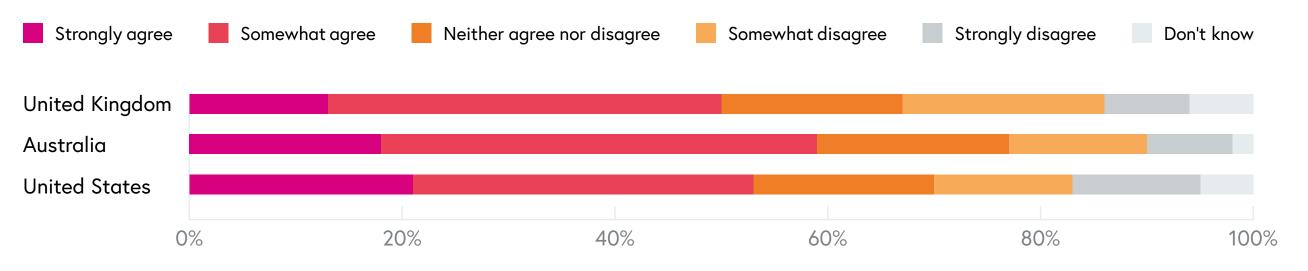# Perceptions of online learning

The views on education online

Sentiment towards learning online

Generally, respondents were more likely to not have educated themselves using a digital platform, but findings show that across the three countries surveyed, adults broadly feel positive towards online learning, with the majority being able to identify benefits to learning in this way.

Respondents across all three countries agree that online learning can provide similar benefits to formal education (59% Australia, 53% USA, 50% UK). Australian adults show the greatest enthusiasm for digital learning: only 21% of respondents in Australia disagree that online learning offers similar benefits to in-person education, compared to 27% in UK.
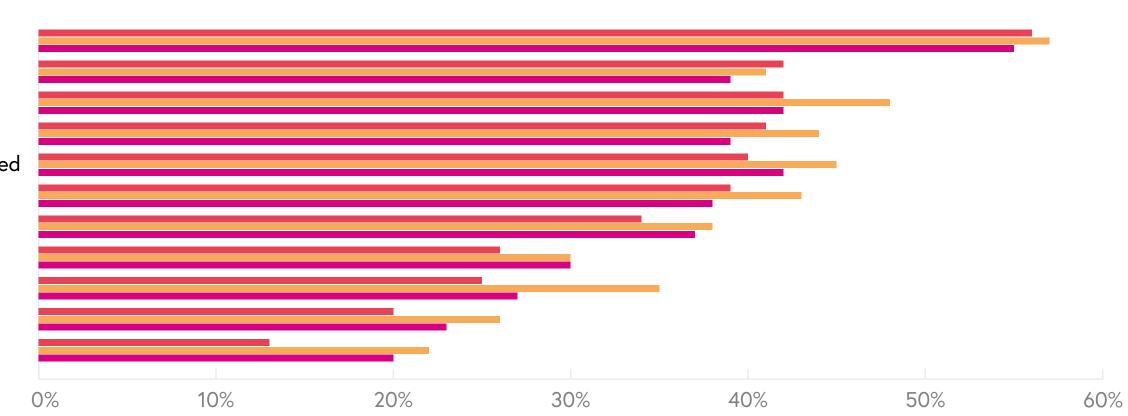
The expert interviewees had no doubt about the transformative power of online education, and the older participants interviewed – who have seen the greatest changes in the sector and to pedagogical techniques over the years – are the most positive about it. They feel that online learning provides real and tangible benefits to learners, as well as a personalised and customisable learning experience.

Online learning can provide similar levels of benefits to formal education

- ■ Strongly agree
- ■ Somewhat agree
- ■ Neither agree nor disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ Don't know

Perceptions of the benefits of online learning

■ United Kingdom ■ Australia ■ United States

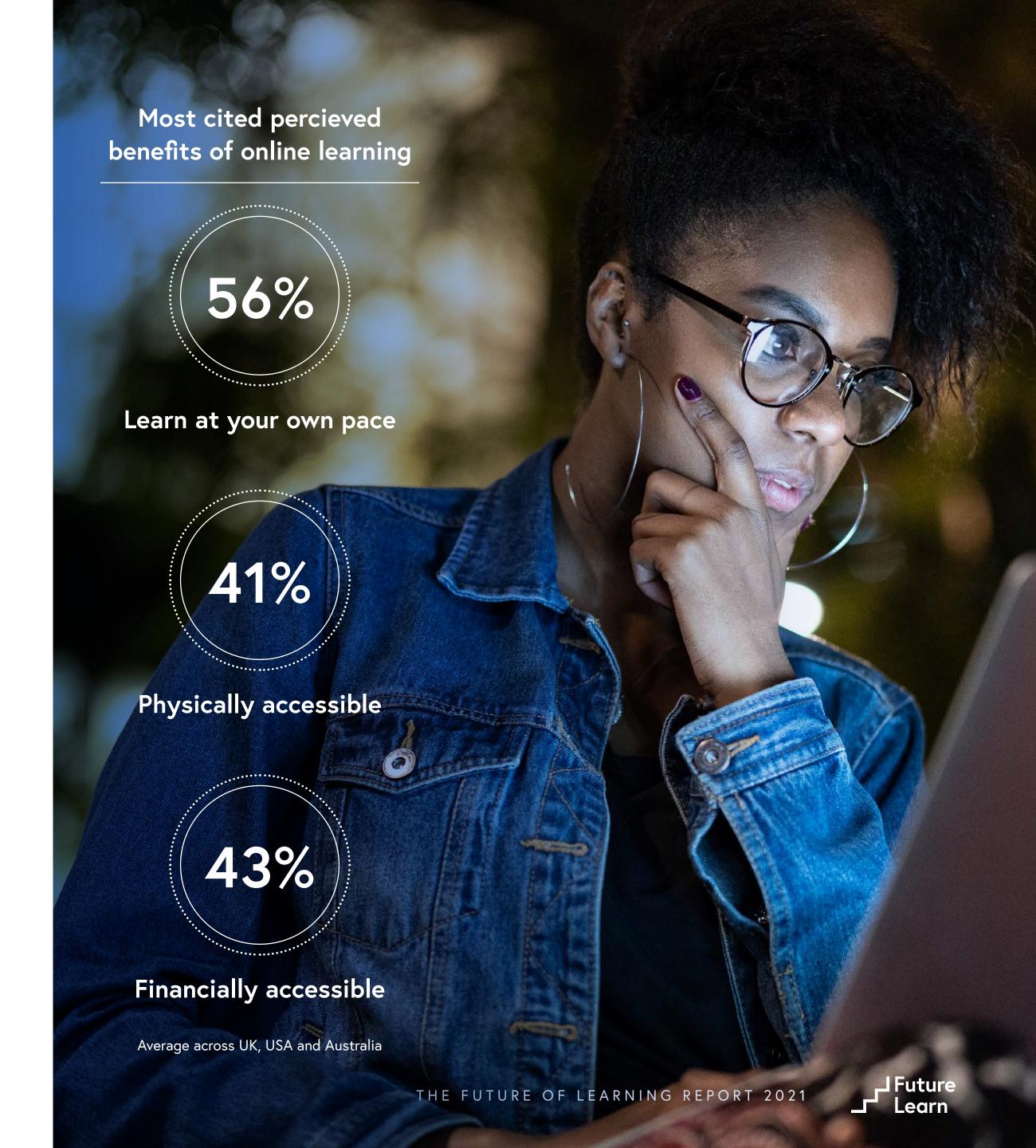Future Learn

Benefits of online learning

When talking about the specific benefits of online learning, the majority of adults across all countries surveyed say that it allows people to learn at their own pace (56% UK, 55% USA, 57% Australia). Over two-fifths (44%) in the UK and Australia say self-paced learning directly increases self-esteem in learning.

Likewise, two-fifths of adults in all three countries believe online learning helps people feel more confident learning about subjects they wouldn't usually feel comfortable learning about (44% UK, 41% USA, 44% Australia).

Accessibility is also seen as a key benefit of online learning. Over two-fifths of adults across the three countries agree that online learning is financially accessible, with Australian adults being the most likely to report this (48%) compared with 42% of USA and UK adults.

Similarly, people believe that online learning is physically accessible (42% UK, 41% Australia, 39% USA) and opens high quality education up to people, regardless of any constraints (45% Australia, 42% USA, 40% UK).

The survey also shows that many believe online learning is better for introverts. When asked what they think to be true about online learning, close to half of people across the three countries say they think that it's better for introverts (49% UK, 49% Australia, 46% USA) than in-person learning.

Most cited percieved benefits of online learning

56%

Learn at your own pace

41%

Physically accessible

43%

Financially accessible

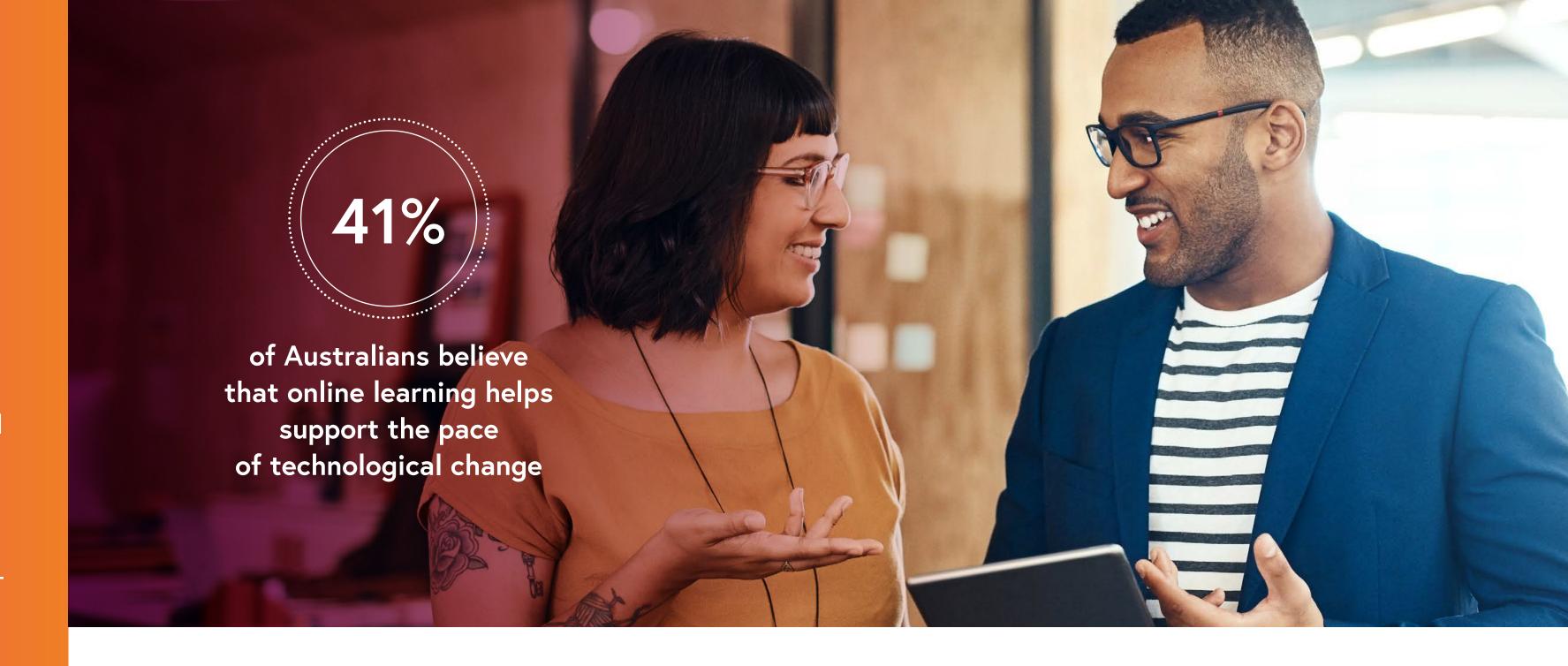Average across UK, USA and Australia

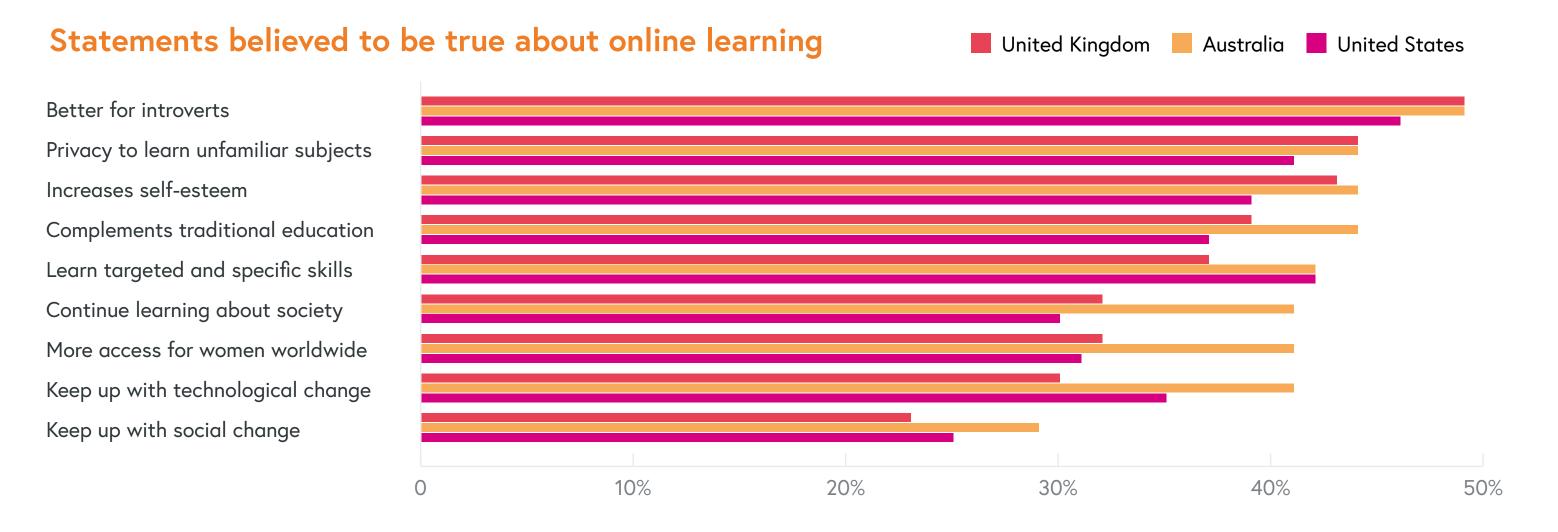Future Learn

Online learning and digital transformation

Australians are most likely to report that online learning allows people to keep up with technological change (41% compared to 35% in the USA and 30% in the UK).

Meanwhile, one in three (29%) Australians say that online learning offers learners the chance to keep up-to-date with social change, which is slightly higher than the proportion of those in the USA (25%) and significantly higher than in the UK (23%).

This could be a result of Australian adults being more likely to have educated themselves on certain subjects online.

When looking specifically at those who have learned online before, the proportion who believe that online learning offers an opportunity to keep up with social (36% Australia, 33% USA, 29% UK) and technological change (47% Australia, 42% USA, 36% UK) increases across all three countries.

41%

of Australians believe
that online learning helps
support the pace
of technological change

Statements believed to be true about online learning

■ United Kingdom ■ Australia ■ United States

Better for introverts
Privacy to learn unfamiliar subjects
Increases self-esteem
Complements traditional education
Learn targeted and specific skills
Continue learning about society
More access for women worldwide
Keep up with technological change
Keep up with social change

0   10%   20%   30%   40%   50%

Future Learn

Blended learning

In our interviews with experts, many said that online learning provides a 'level playing field' for students and removes many of the distractions that are present in a face-to-face environment – which is particularly helpful for students with behavioural issues.

Furthermore, and reflecting the quantitative data above, this 'level playing field' helps students who would typically be nervous to speak up in class or get involved in discussions. Being able to type contributions in an online setting is seen as much more beneficial to many students, as social anxiety does not inhibit anyone's ability to learn.

All the experts interviewed were passionate about the opportunities that online learning can bring for learners of all ages. They saw potential for online learning to change (rather than replace) traditional learning environments. They also saw it as a crucial delivery tool for educational organisations looking to open their doors to a wider international pool of learners. They fully recognised that, for adult learners, it provides the flexibility they may need to fit learning around already busy schedules.

" I think there will certainly be more formal blended learning and I'm hoping that we might move into hybrid degrees, where you don't necessarily have students coming to UCL for a three year degree programme – they might come for one year and do the other two years online at home. "

Professor Diana Laurillard UCL Knowledge Lab

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Improving education access

Our experts believed that online learning would lead to the democratisation of learning, where many who could not (or would not) access it previously, now can.

The experts were also concerned that online learning could become the less desirable method of education, particularly in developing countries, and that face-to-face learning would always be seen as the 'gold-standard'.

Many experts made the point that the quality of learning must be standardised and maintained across educational settings.

Related to this is the concern that education today is too directive in terms of teachers telling children what to learn, and that this cannot be replicated in an online setting.

However, the experts agree that the core benefit online learning provides is being able to learn with people who you wouldn't normally be in a class with. Online learning means you can connect and speak directly to people in different countries. As Dean Patricia Davidson puts it, "the ability to share experiences, the ability to connect with others is amazing".

Professor Mark Brown also mentioned that, in a practical sense, current educational infrastructure will be unable to support 1 billion more learners coming to education – so it will be necessary for at least some of this learning to take place online.

> **In ten years, there'll be more democracy and I think with the advancements in technology, there'll be more accessibility.**
>
> *Sara Ali* The Hopenclass

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"Online learning is a gift to the world… It allows any person of any ethnic background in any country, in any village, in any city, in any state, anywhere, to come together and learn, and it allows the classroom to meet each other… and discuss their cultural differences."

Ranata Hughes Visiting Instructor, Florida A&M University

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COVID-19 propelled online education forward

The influence of the COVID-19 pandemic on the education sector is an interesting subject area to explore. When this survey was conducted in December 2020, a third of adults in both Australia (35%) and the USA (34%) reported being more interested in taking part in an online learning course as a result of COVID-19. Notably, this is significantly higher than in the UK (25%). FutureLearn saw an increase of around four times the enrolments in teaching courses in 2020 compared to 2019, likely due to COVID-19 and the need for teachers to learn how to teach online.
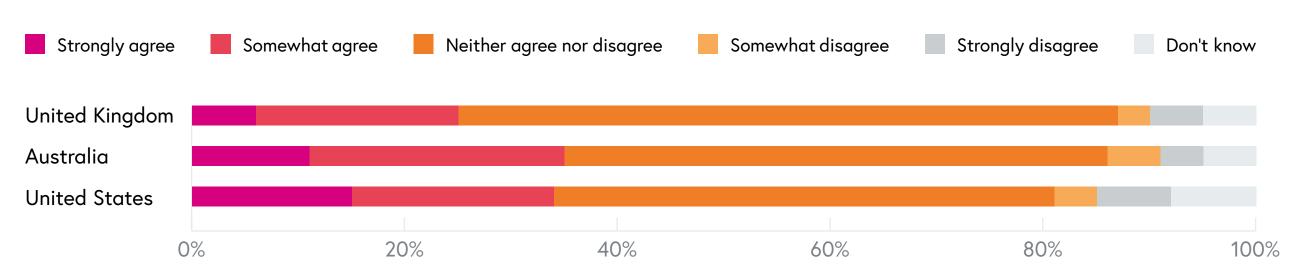
Interest increases in all countries when looking at those who experienced a change in career as a result of COVID-19. Three quarters (74%) of adults in the USA who have had to move into a new career that requires a new skill set report being more interested in taking an online course.

Meanwhile, just over two-thirds (68%) of Australian adults who had re-evaluated their career path as a result of the pandemic are now more interested in an online course.

In the USA, close to half of those who are currently students (47%) report being more interested in online learning, while over a third of those in the UK (36%) report increased interest.

In the expert interviews, there was a great deal of discussion about the future of learning in an online setting, which is both central to this research and particularly timely as a result of COVID-19.

Impact of COVID-19 on interest in online learning

Legend: ■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

United Kingdom
Australia
United States

0%   20%   40%   60%   80%   100%

FutureLearn

There is consensus across the interviewees that COVID-19 has allowed us to make great strides in being able to 'remove the armbands' and fully embed online learning as an educational mainstay.

Experts felt that it has truly acted as an accelerant in this area, and they are, on the whole, pleased that it has done so.

Indeed, not only has online learning filled the void left by face-to-face learning, it has actually allowed us to go further. Professor Susan Elliott pointed out that every single cohort, bar one, has seen improved academic performance this year.

Though some are concerned that we will lazily revert to more established learning patterns after the pandemic is over, there is a belief that we are very much through the looking glass and are now able to accept the benefits of learning online or, at the very least, hybrid learning.

Experts believe that there is further to go, but by allowing educators, parents, and learners to conquer any fears and misapprehensions around online learning, it has really opened the door and instigated both an attitudinal shift and a new era of innovation.

" Only a pandemic was going to move people so quickly into the online learning space. Lots of universities and FE colleges and schools were dipping their toes into the waters of digital learning, but it was always in support of a conventional classroom experience. Covid forced us to make it the primary experience. "

Professor Josie Fraser The Open University

Future
Learn

"Online learning will allow us to bring more people in, give more people skills. People need to move beyond the value judgement that online education is inferior or a quick fix."

Dean Patricia Davidson School of Nursing,

Johns Hopkins University

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Personal Development

"Upskilling will be something that people need to do, and I hope they want to do it. I hope we build cool enough tech and interesting enough learning experiences that it's something they want."

Dr Caitlin Hayward University of Michigan

Personal approaches to learning

How we like to learn

Findings show that adults across the UK, USA, and Australia all enjoy a range of approaches to learning.

Generally, Australian adults are more likely to identify structured online learning as their preferred way of learning.
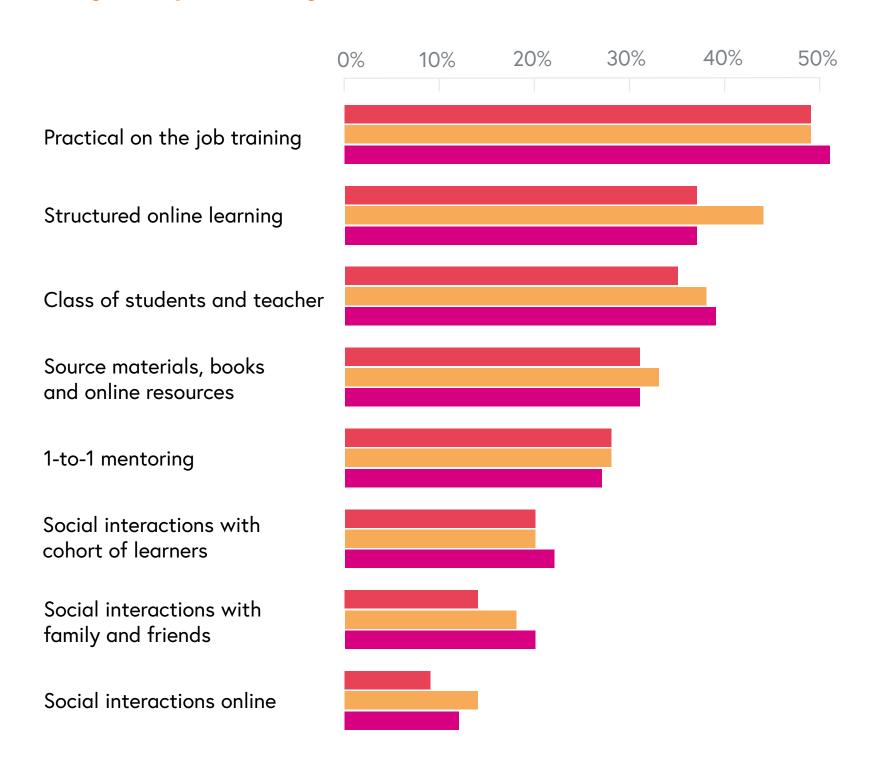
While most adults across the UK, USA and Australia report that they're more suited to on-the-job practical training, close to two-fifths of adults across the three countries also identify structured online learning as a preferred way to learn. Australian adults are significantly more likely to state this (44%) than those in the UK and USA (both 37%).

Correspondingly, a third of those surveyed say they're more suited to learning in private with books and online resources (33% Australia, 31% UK, 31% USA). This proportion increases for those who are full-time students in Australia (48%) and the UK (40%).

1/3 of adults report they are suited to learning in private with books and online resources

Learning forms that people feel they are personally best suited to

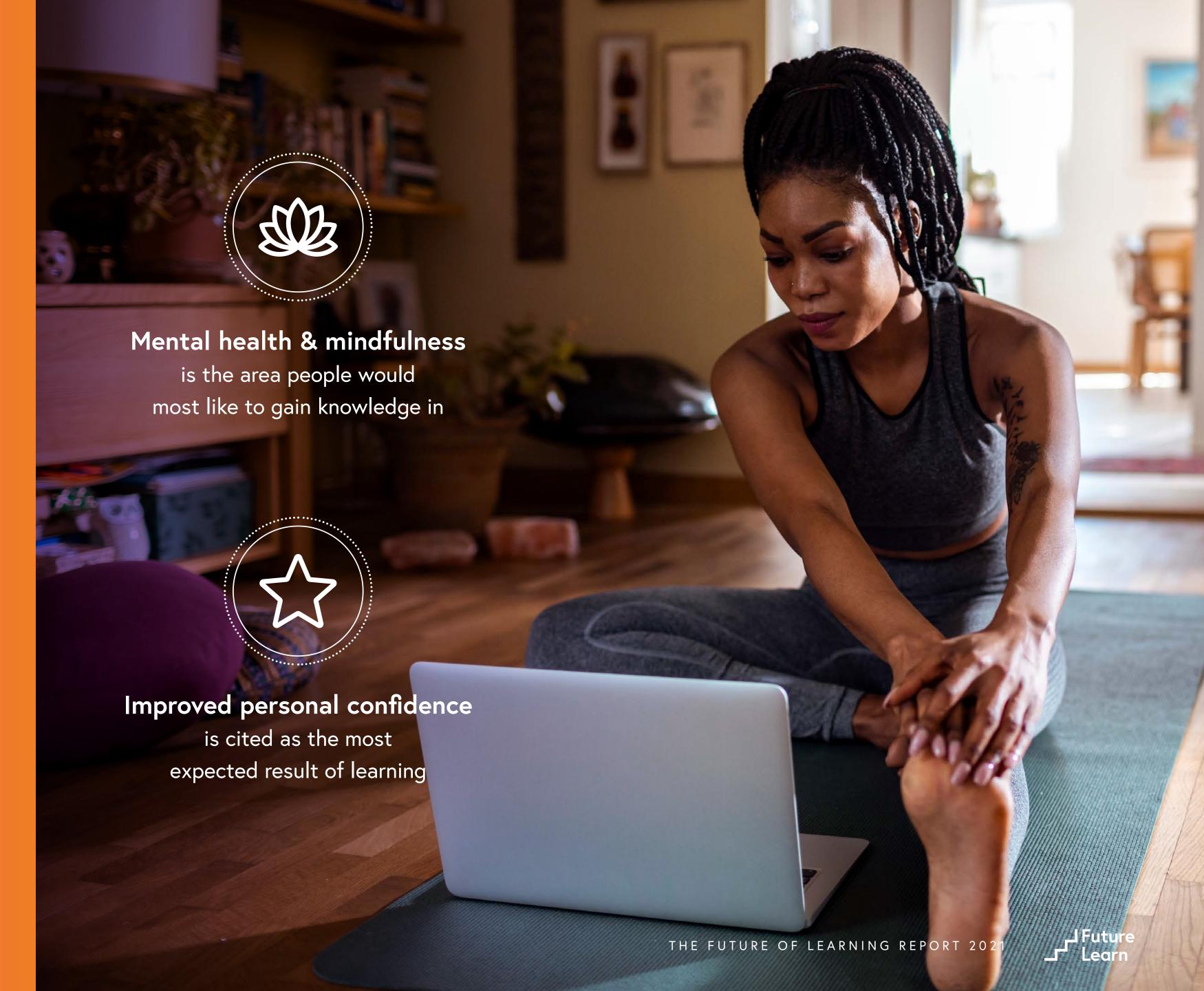|	0%	10%	20%	30%	40%	50%
Practical on the job training						
Structured online learning						
Class of students and teacher						
Source materials, books and online resources						
1-to-1 mentoring						
Social interactions with cohort of learners						
Social interactions with family and friends						
Social interactions online						

In-demand subject areas

The majority of adults across all countries identify at least one subject area they'd like to learn more about in the next five years (78% Australia, 73% USA, 67% UK).

People in the USA and Australia are less likely than people in the UK to report there is nothing they would like to learn more about (18% and 21% respectively versus 28% in the UK).

People in the UK and Australia show the highest interest in learning more about health, with mental health and mindfulness a priority for people in all countries surveyed.

Respondents in Australia are most likely to say mental health and mindfulness is their preferred subject area (39%), compared with 33% of Americans and 29% of UK adults. Interestingly, data from SEEK, FutureLearn's joint shareholder alongside The Open University, shows that healthcare and medical was the second largest industry by job volume in 2020.

This is followed closely by nutrition, diet, and physical health. Australians and Americans are again most likely to say this (36% and 35% respectively) compared to just over a quarter of UK adults (28%).

Mental health & mindfulness
is the area people would
most like to gain knowledge in

Improved personal confidence
is cited as the most
expected result of learning

This is mirrored by FutureLearn's data, which shows an increase in enrolments of over 150% in its healthcare courses. There is also a clear trend towards more women on the FutureLearn platform enrolling in mental health and psychology (67.8%), healthcare and medicine (58.2%), and health and psychology (61.2%) courses.

Of those looking to gain knowledge in specific areas, most think they would improve personal confidence as a result of learning more (51% Australia, 47% USA, 46% UK).

This is closely followed with learning to expand hobbies and interests (49% Australia, 46% USA, 45% UK). Australian and American adults are significantly more likely to consider learning to have a positive impact on their community as a possible result of gaining more knowledge (46% Australia, 45% USA) than those in the UK (37%).

Likewise, close to three in ten Australian (30%), American (28%) and British (26%) adults want to learn how to be a conscientious citizen of the world. Amongst those who said they used digital platforms to educate themselves on social justice, diversity and inclusion, and environmental sustainability, this proportion increases significantly across all three countries (42% UK, 38% Australia, 38% USA).

Areas in which people would like to gain more knowledge in the next 5 years

Mental health and mindfulness
Nutrition / diet / physical health
Be a conscientious citizen of the world
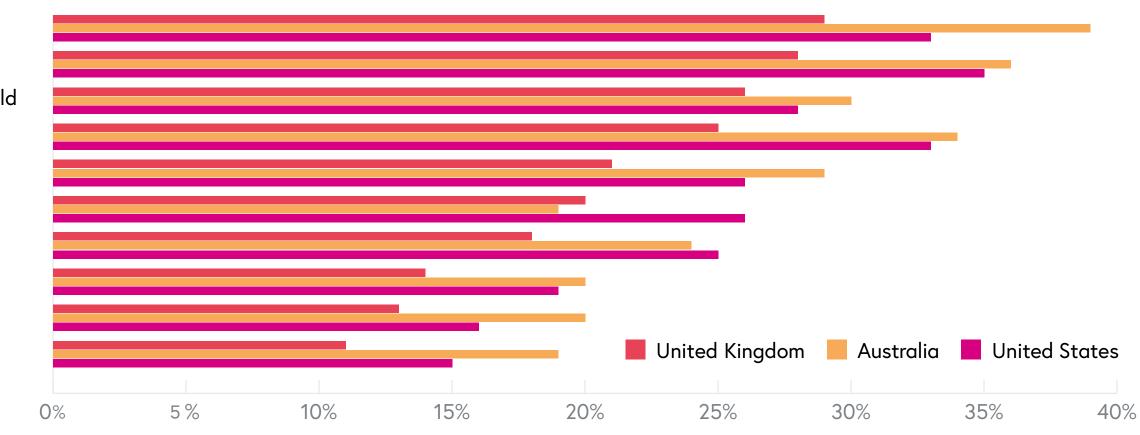Manage personal finance
Impact of technology
Politics
Human rights
Career development
IT / Coding / Game Development
Teaching / Parenting

■ United Kingdom ■ Australia ■ United States

0%   5%   10%   15%   20%   25%   30%   35%   40%

46% of Americans want to learn to expand hobbies and interests

30% of Australians want to learn how to conscientious citizens of the world

37% of Britons think learning will have a positive impact on their community

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Looking specifically at those who want to learn more about mental health and mindfulness, the proportion who say they learn to improve personal confidence increases (62% USA, 60% Australia, 59% UK).

Similarly, people's belief that online learning could have a positive impact on their local community and the wider world also grows, with close to three-fifths from the USA and Australia believing this could have a positive impact on the world (62% USA, 55% Australia) and on their community (58% Australia, 57% USA). This response is lower in the UK, with 47% reporting there could be a positive impact on their community and 45% reporting a positive impact on the world.

Among employed people surveyed, Australians are most likely to report that learning more about these areas could result in them future-proofing their career by widening their skill set (37% compared with 32% in the UK and 28% in the USA).

Those people may be interested to know that, according to SEEK, the most in-demand soft and transferable skills include: communication skills, interpersonal sensitivity, autonomy, time management, and resilience.

Over a third of employed adults across the three countries also believe that learning could boost their professional confidence (39% Australia, 37% USA, 35% UK).
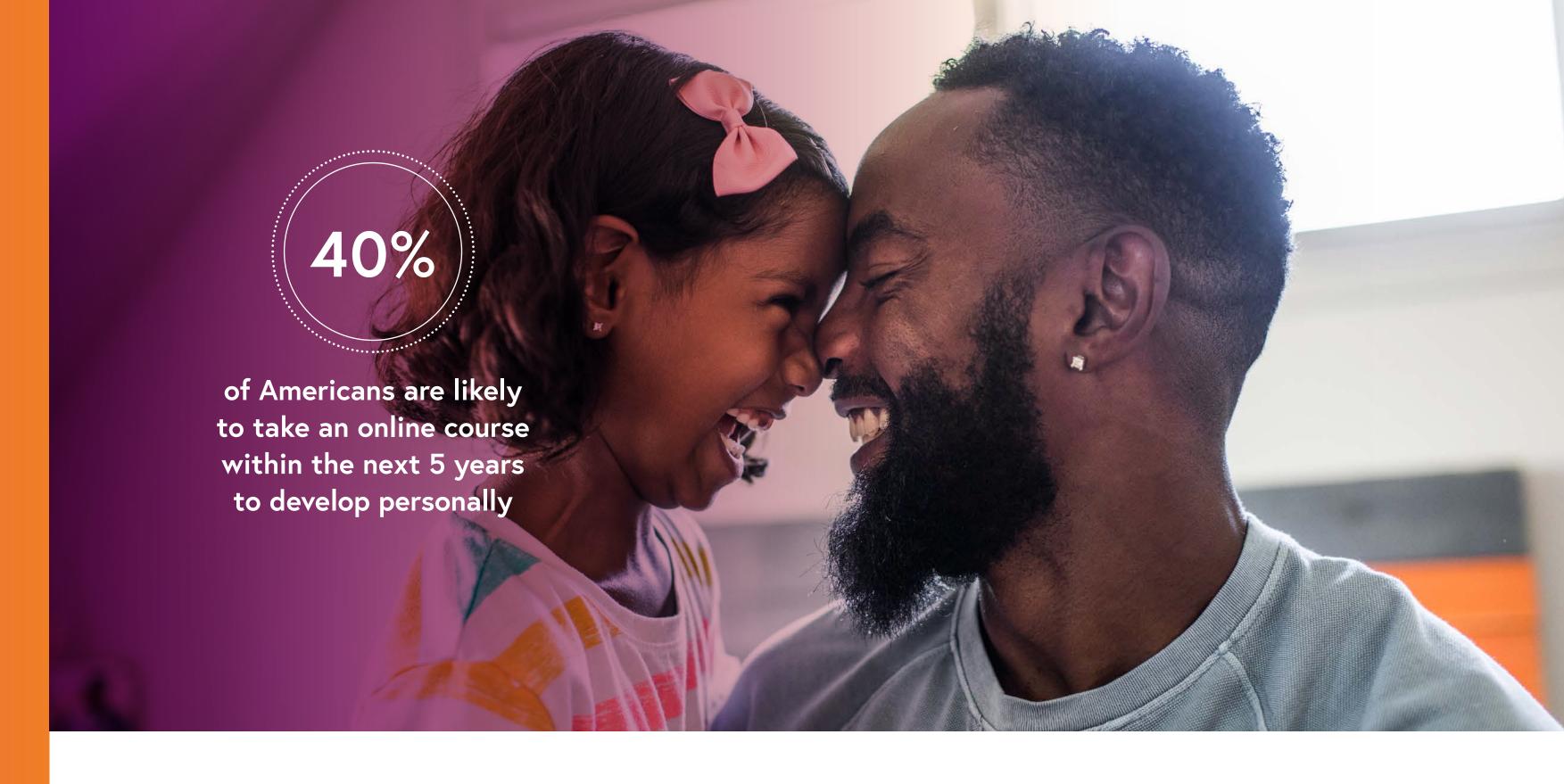
% of employed adults who think online learning could boost their professional confidence

39%

of Australians

37%

of Americans

35%

of Britons

Future
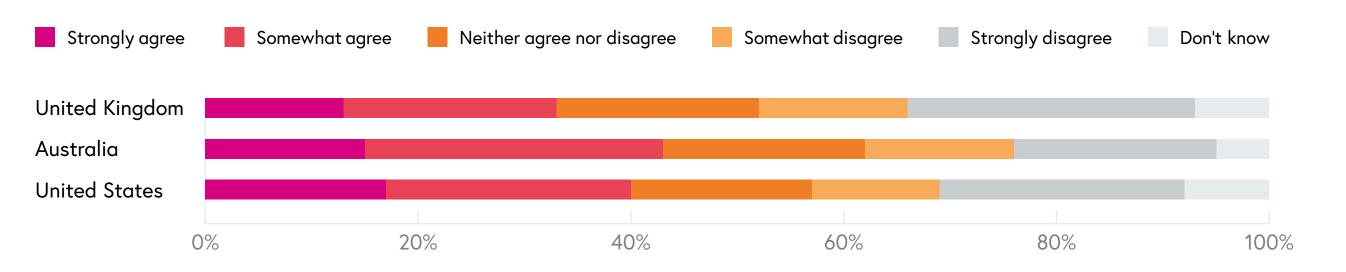Learn

Upskilling for the future of work

Many people surveyed say they would like to take an online course in the next five years for personal development.

This proportion is highest among adults in Australia (43%) and the USA (40%), both of whom report significantly higher interest than those in the UK (33%).

People who identified no subject areas where they would like to learn more are the least likely to agree that they'd like to take an online course to develop themselves personally (15% USA, 12% Australia, 11% UK).

40%

of Americans are likely to take an online course within the next 5 years to develop personally

I am likely to take an online course within the next 5 years to develop myself personally outside of my career

■ Strongly agree   ■ Somewhat agree   ■ Neither agree nor disagree   ■ Somewhat disagree   ■ Strongly disagree   ■ Don't know

United Kingdom
Australia
United States
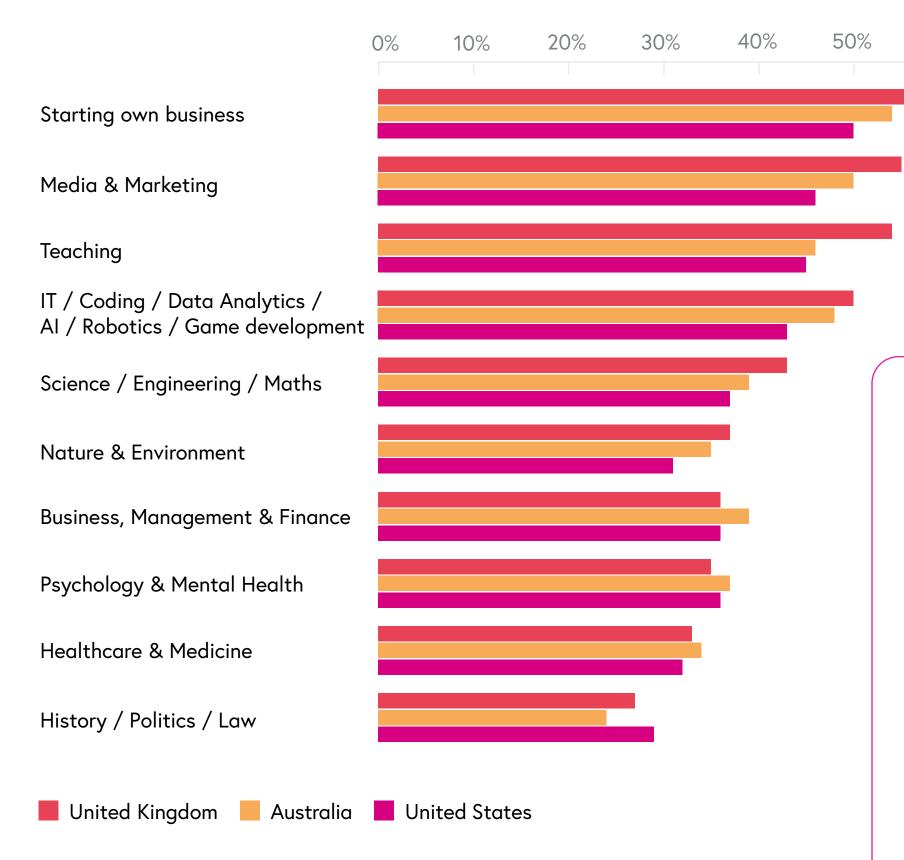
0%   20%   40%   60%   80%   100%

Future Learn

Creative skills

The majority of adults across all countries identify at least one area where they believe creative skills[2] would be needed (84% Australia, 78% USA, 78% UK).

'Starting your own business', is the most commonly mentioned area across all countries, with adults in the UK being significantly more likely to say this than those in the USA (57% UK, 54% Australia, 50% USA). This is followed by 'media and marketing' (57% UK, 54% Australia, 50% USA) and 'teaching' (54% UK, 46% Australia, 45% USA).

Respondents across all three countries say a wide range of disciplines require creative skills to varying degrees, including IT, science, nature, psychology, healthcare, and history/politics/law.

[2] For the purpose of this question, creative skills are defined as: 'the ability to think about a task or a problem in a new or different way, or the ability to use your imagination to generate new ideas'.

Areas where people believe creative skills are needed

■ United Kingdom ■ Australia ■ United States

WHAT DO THE FINDINGS SHOW?

Those interested in setting up their own business have an increased belief in the importance of creative skills when doing this; across all countries, the proportion of those who say creative skills would be needed when setting up a business increases when looking at those who would be interested in setting up a business in the next 10 years (62% UK, 61% Australia, 59% USA).

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"Soft skills, things like performing arts dance, drama, theater activities, music, all help to create and foster communication, group work, collaboration. These are the key building blocks of learning that we need to foster in terms of the sorts of people that are then going to go into workplaces."

Nick Isles CEO, Condé Nast College of Fashion & Design

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"For kids, every prediction is that they will have multiple careers in their lifetime, that they will retrain, that they will move jobs."

Professor Josie Fraser The Open University

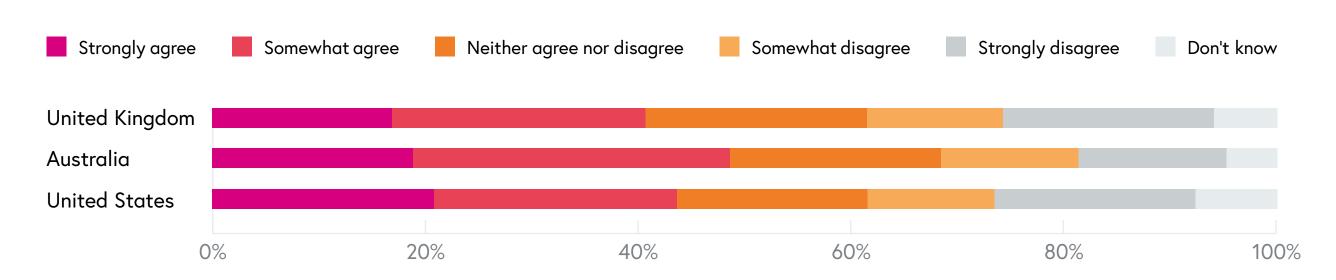# Professional Development
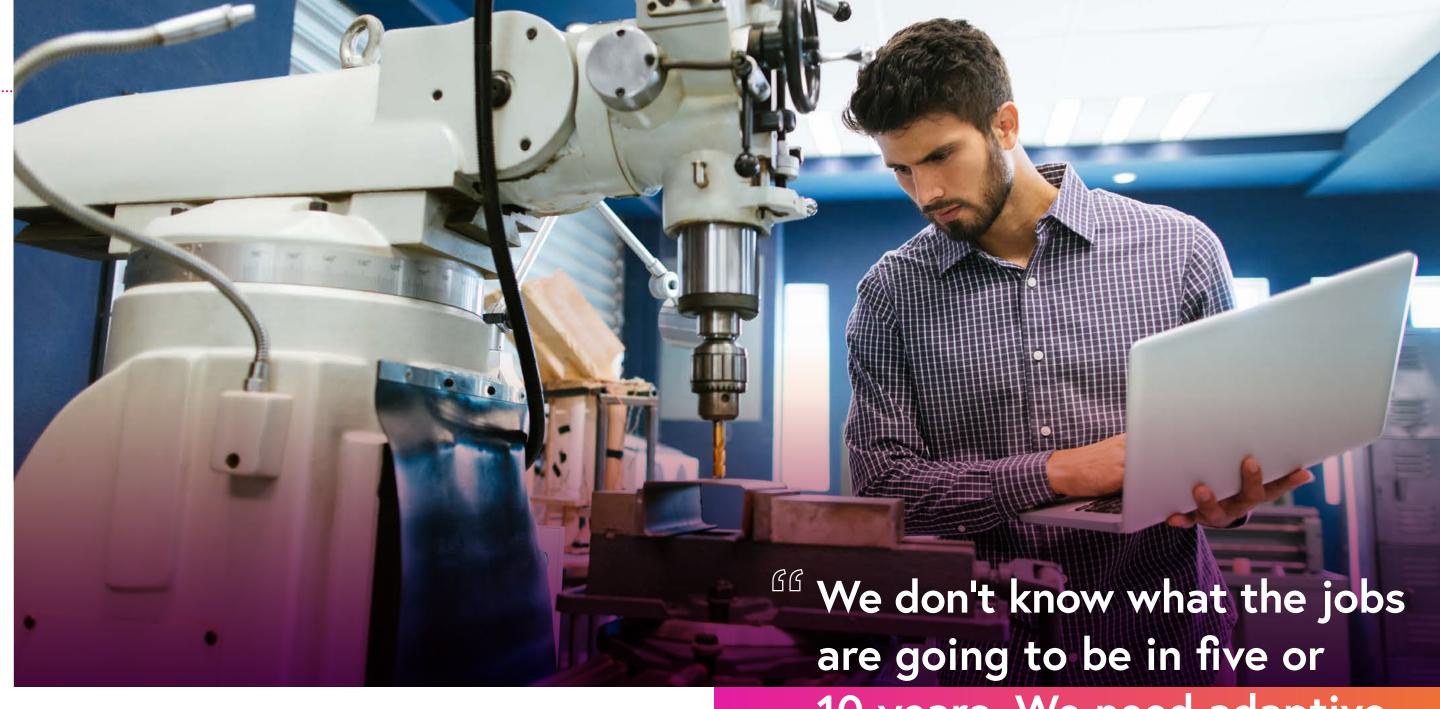
Online courses and career development

The changing work place

Across all countries, a significant proportion of respondents agree that they are likely to take an online course within the next five years in order to grow their skill set and get ahead in their career (UK 40%, USA 44%, Australia 49%).

In each country, those who previously reported that COVID-19 had impacted their career in some way are more likely to say they'd take an online course to get ahead in their career (59% Australia, 58% USA, 55% UK). This is significantly higher than the proportion of those who stated that their career had remained unchanged (42% Australia, 35% USA, 35% UK).

> **We don't know what the jobs are going to be in five or 10 years. We need adaptive people with resilience, the ability to learn and change their careers.**
>
> *Nick Isles Condé Nast College of Fashion & Design*

I am likely to take an online course within the next 5 years to grow my skill set

- ■ Strongly agree
- ■ Somewhat agree
- ■ Neither agree nor disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ Don't know

United Kingdom
Australia
United States

0% 20% 40% 60% 80% 100%

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"The rise of doing additional learning to accelerate or pivot your career has to become more common and also the rise of the laser learner who needs another bite of knowledge, a new skill, a new insight into whatever it is that's come into their world."

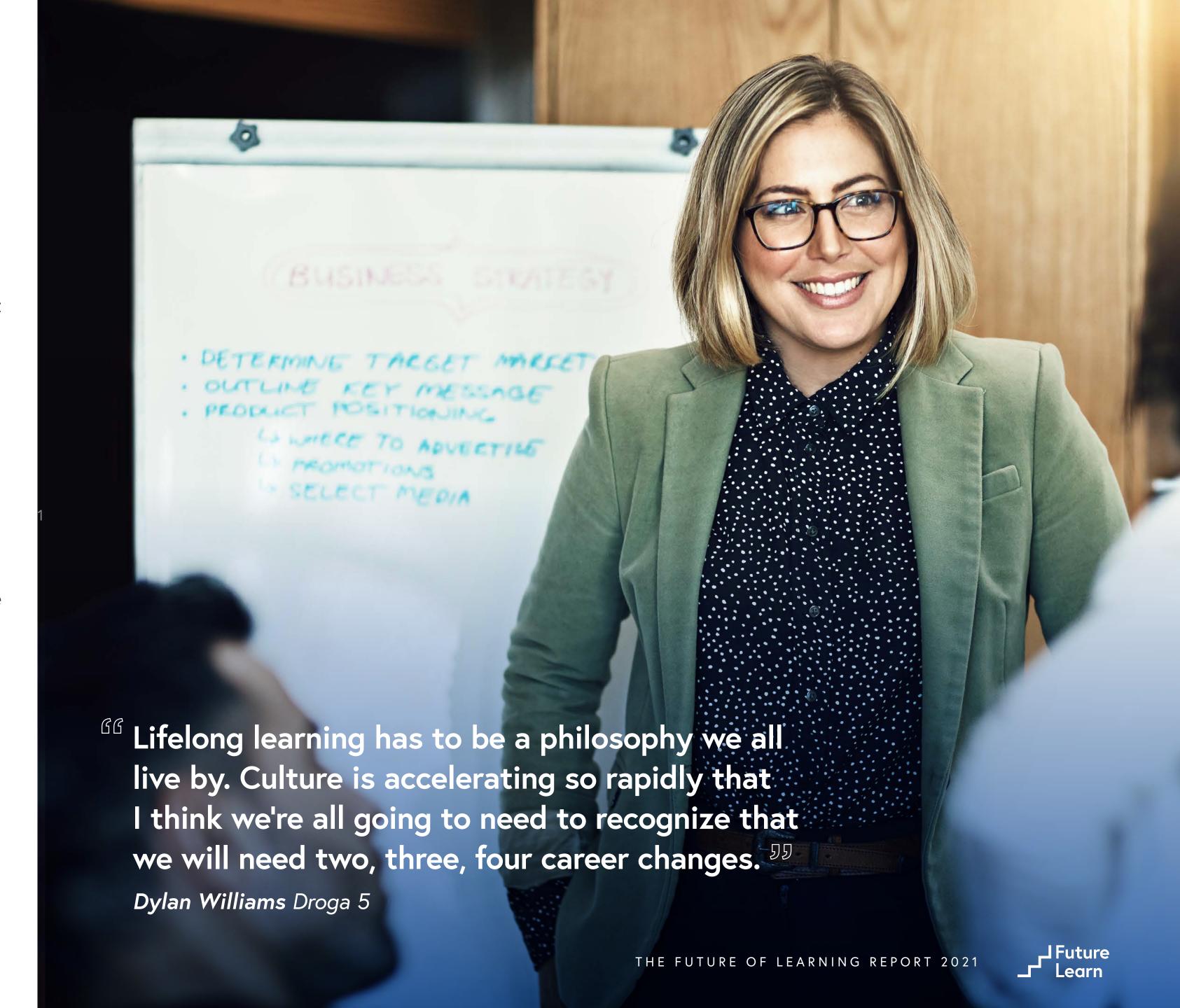**Professor Susan Elliott** Deputy Vice-Chancellor and Senior Vice-President (Education), Monash University

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Career expectations

The trend towards changing jobs and industries is backed up by data from SEEK. 72% of jobseekers who had at least one job in the last two years held 5-10 jobs every five years, illustrating that the 'job for life' is becoming, or may now have already become, a thing of the past for most people.

To further illustrate this, SEEK reports that 8.6% of dental assistants hold a non-health related degree, 7% of early childhood teachers hold a degree in business and management, and 6.7% of business development managers hold a degree in engineering.

Indeed, nearly half (49%) of Australian adults believe that, in the future, education will have the power to give people the opportunity to try different industries before committing to a career path. This is followed by 41% of Americans and 38% of UK adults.

Among those who currently work, one quarter of Australian adults report that they do not expect to be working in the same industry in 2030. This is significantly higher than the proportion of Americans (20%) and UK adults (21%) who say they do not expect to work in the same industry. This expectation is driven by Generation Z across all countries (42% USA, 32% UK, 46% Australia).

> "Lifelong learning has to be a philosophy we all live by. Culture is accelerating so rapidly that I think we're all going to need to recognize that we will need two, three, four career changes."
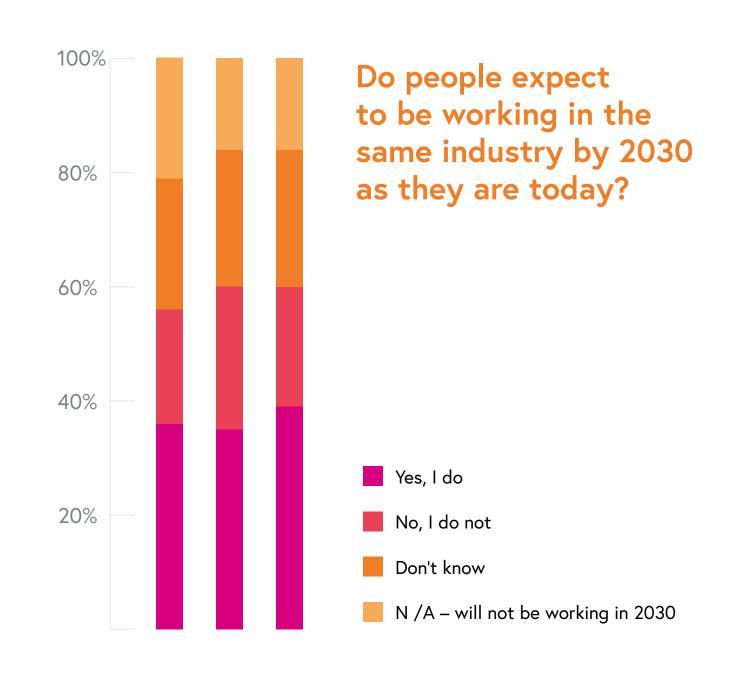
Dylan Williams Droga 5

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The proportion of those who do not expect to be in the same industry by 2030 increases amongst those who say they have re-evaluated their career path as a result of the COVID-19 pandemic.

Two-fifths of these individuals in the UK report that they do not expect to be in the same career by 2030 (39%), with a similar proportion reporting this in Australia and the USA (both 36%).

When asked to explain why they do not expect to be in the same industry by 2030, people are most likely to report that as time has developed, their passions have changed (36% Australia, 30% USA, 27% UK).

Experts agreed that many people would need to change their job roles in the future and discussed what that means for the world of education.
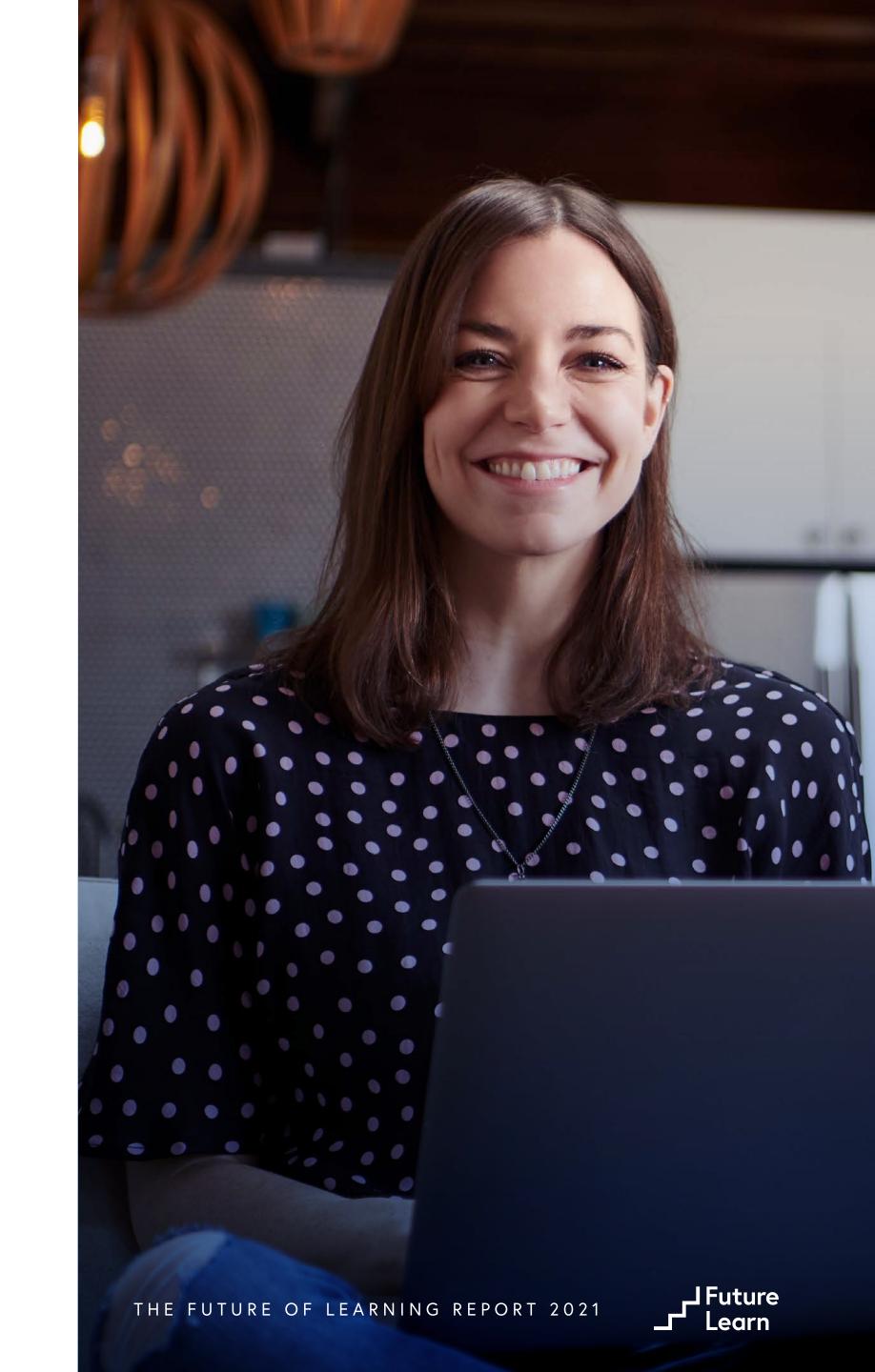
Do people expect to be working in the same industry by 2030 as they are today?

- Yes, I do
- No, I do not
- Don't know
- N /A – will not be working in 2030

39% of UK adults who have re-evaluated their careers, do not expect to be in the same industry by 2030

36% of both US and Australian adults who have re-evaluated their careers, do not expect to be in the same industry by 2030

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Career changers

People in the USA and Australia who do not expect to be working in the same industry by 2030 are significantly more likely to say they want to use online learning to help change their current career (30% in the USA and 22% in Australia, compared with 10% in the UK).

Somewhat unsurprisingly, these proportions increase among those who say they're likely to take an online course within the next five years in order to get ahead in their career. Close to a fifth of this audience in the UK report that they would use it to change their current career (18%), which increases to just over a third in Australia (35%) and the USA (37%).

31% of employed people surveyed in Australia say that they would consider spending personal time or money to learn new skills for a job or career move in the next year; this is significantly higher than the proportion of those in the USA (26%) and the UK (21%).

This sentiment increases among those who'd like to take an online course in the next five years to get ahead in their career; close to half in Australia (47%) and the USA (46%) say that they would consider spending time or money to learn additional skills, compared with two-fifths in the UK (39%).

3 in 10 Americans, who don't expect to be working in the same industry by 2030, want to use online learning to help change careers

31% of working people in Australia say they would consider spending personal time or money to learn additional skills for a job

27% of UK adults say that they expect that their passions will have changed and therefore they will have changed industries

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COVID-19 is impacting careers

All those who are not retired were asked to assess the impact of COVID-19 on their careers. Although the majority report that there had been no changes to their career as a result of the pandemic, many other effects were recorded.

In the UK, these respondents are significantly more likely to report that their career has not changed as a result of the pandemic (72%), compared with just over half of those in Australia (56%) and the USA (51%).

Close to a sixth of non-retired people in Australia and the USA report that the pandemic has led them to re-evaluate their career path (15% and 14% respectively), compared with just under a tenth in the UK (8%).

Comparatively, just under one in ten in Australia and the USA report that they have had to change their role in their industry and now require a new skill set (9% and 8% respectively), while a similar proportion report that they require a brand-new skill set from entering an entirely new industry (9% and 7% respectively).

Impact of COVID-19 pandemic on career

Re-evaluated my career path

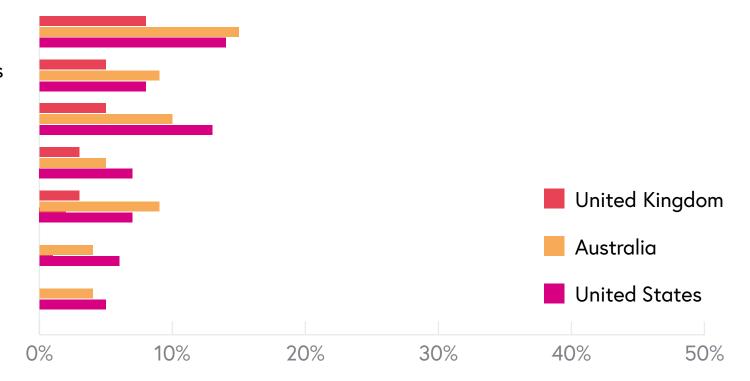Changed role within same industry which requires new skills

Lost my job

Lost job but have a plan, feel motivated

Moved industry and require a new skill set

Started my own business

Pivoted my business

■ United Kingdom
■ Australia
■ United States

0%   10%   20%   30%   40%   50%

8% of Americans have had to change their role in their industry and now require a new skill set

1 in 6 Working people in Australia and the USA report that COVID-19 has made them re-evaluate their career path

Business aspirations

When asked to what extent they would like to set up a new business in the next 10 years, just under two-fifths of Australian (38%) and American (32%) adults say they would like to.

Comparatively, this is the case for a significantly smaller proportion (8%) of UK adults. In fact, more than half (53%) of UK adults say they do not want to set up a new business at all during this timeframe, compared to 41% of Australian adults and 40% of American adults.
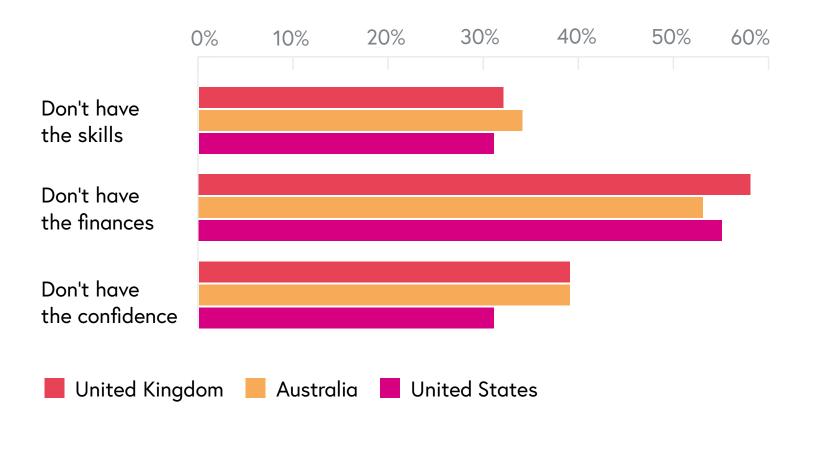
Among those who would like to set up a new business within the next 10 years, roughly a third in all three countries surveyed feel they do not currently have the skills needed to do so (34% Australia, 32% UK, 31% USA). Notably, this is a perception that decreases with age.

39% of adults in both the UK and Australia who would like to set up a new business within the next 10 years do not currently feel confident enough to do so, compared to 31% in the USA.

However, findings indicate that finance is more of a barrier to setting up a new business more than skills or confidence. A majority of those who would like to set up a new business within the next 10 years in each country

say they do not currently have the finances to do so (53% Australia, 58% UK, 55% USA).

Across the national populations of the UK, USA and Australia, the top way adults believe online learning could support people to succeed in business is by teaching them how to use new technologies. This perception is particularly pronounced in Australia (54%), although not overly different in the USA (51%) and UK (46%).

Perceived barriers to setting up a business in the next 10 years

	0%	10%	20%	30%	40%	50%	60%

Don't have the skills

Don't have the finances

Don't have the confidence

■ United Kingdom   ■ Australia   ■ United States

Levels of interest in setting up a new business in next 10 years

18%

of Australians would like to set up their own business

53%

of Britons are not interested in setting up their own business
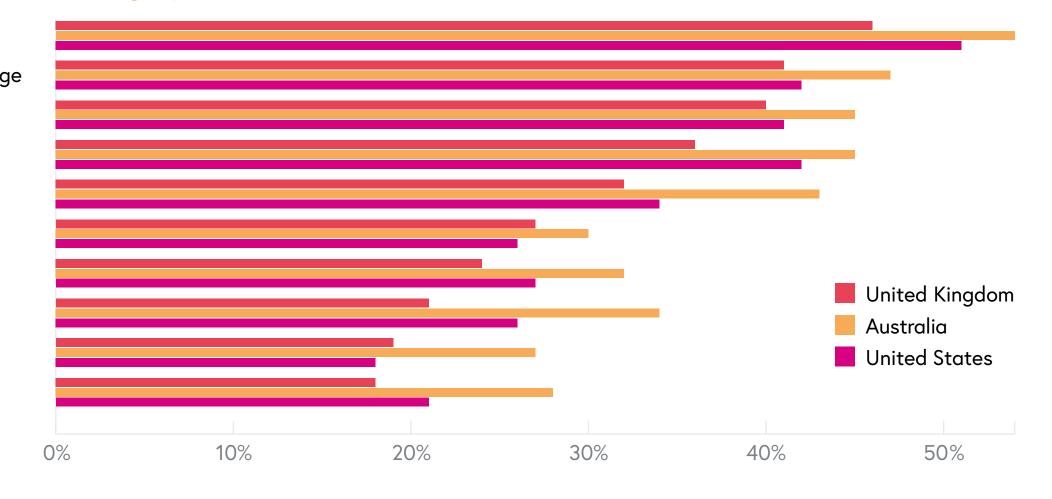
10%

of Americans are unsure
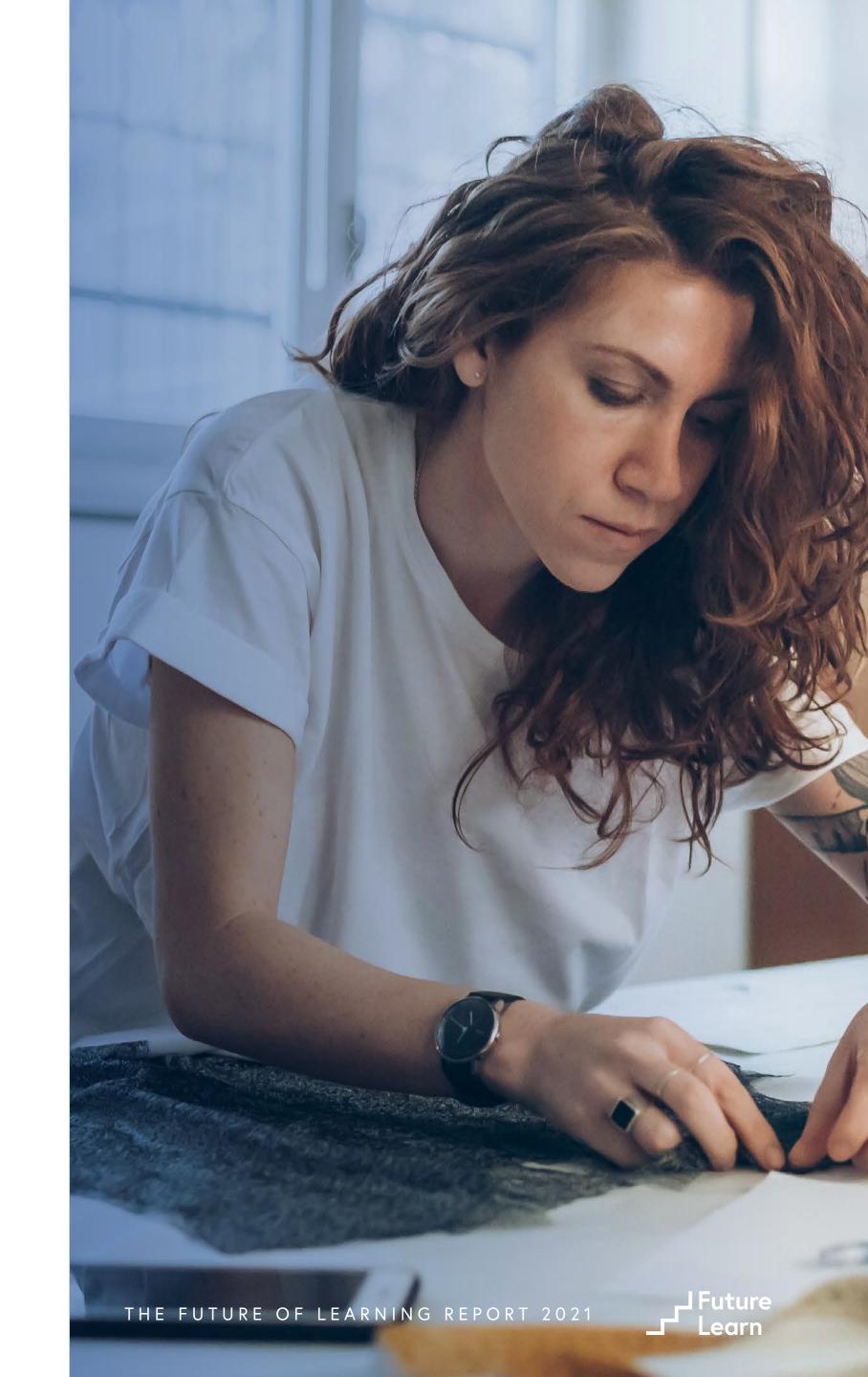
Future Learn

Online learning for entrepreneurs

Other noted uses of online learning for supporting people to succeed when setting up a business include learning about social media marketing (41% UK, 47% Australia, 42% USA), learning what is needed for a brand to be successful (40% UK, 45% Australia, 41% USA), and helping to network with more people globally (36% UK, 45% Australia, 42% USA). In most cases, these benefits are most commonly perceived by Australian adults.

Roughly a third (32%) of employed Australian adults agree that they are likely to take an online course in the next five years to start their own business. Adults in the USA are slightly less likely to say this (27%), while those in the UK are much less likely to do so (14%).

Perceptions of ways online learning can support people to succeed when setting up a business

Learn new technologies
Increase social marketing knowledge
Increase knowledge of brand
Network globally
Develop management skills
Support business finances
Increase customer expertise
Make them more creative
Build resillience
More assertive decision making

United Kingdom
Australia
United States

0%   10%   20%   30%   40%   50%

The Future of Learning

"Education is not just about preparing people for their immediate jobs and their short-term futures. It's about big questions about who we are, who we want to be, and what we want to do in the future."

Professor Mark Brown *Dublin City University*

"We all go through cycles of learning... Whether that's through formal education or not is a separate question, but I think the starting point would be that we've really got to look to lifelong education, rather than formal education only happening at one point in your life."

Dr Rachid Hourizi Director, Institute of Coding

FutureLearn

Ready for change and innovation

A desire for a new way of learning

Across the UK, USA, and Australia, people showed optimism and substantial appetite for change within the education sector. Consumers and experts identified technologies, ideas, and new innovations they would like to see disrupting this space sooner rather than later, with the majority also highlighting the power of education to change the future for the better.

Despite their different perspectives, our panel of experts were passionately aligned on the need for traditional definitions and norms to evolve. For one, learning content needs to be considerably more grounded in experiences, and less about solely providing a pathway to employment.

"I think we have to be much better at allowing the recognition of what people's experiences bring to their knowledge and learning, and not try to disassociate their academic learning and experiential learning."

Provost Ian Dunn Coventry University

Future
Learn

"Online learning is what's going to preserve the education system... it's going to expand, it's going to become more unique, more customised. It's going to become more catered to individuals."

Ranata Hughes Visiting Instructor, Florida A&M University

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Customising learning experiences

The interviews with experts continuously circled back to the broader theme of how we educate, the role of the educator, and the demands they place on students.

Many feel that traditional education is simply too directive, that teachers are not consulted in terms of how they educate, and that we need to quickly move beyond this approach and be more collaborative and communicative with educators and the latest methodologies. For Dr Rachid Hourizi (Director at the Institute of Coding), modular stackable education "gives us something more agile. It allows people to show different value."

In turn, this will impact how educators teach. All experts were adamant that teaching needs to be more of a conversation, less about the recital of facts and more about teaching students to think critically and make value judgments. Such pattern recognition and distinctions are incredibly important in an era of fake news, and this new pedagogical discipline is thought to be vital.

Professor Mark Brown explained, "I have yet to come across someone that would challenge the argument that what we should be doing is producing more creative, more critical, and more imaginative learners. But if that's one of the outcomes we're seeking out of our education

system from school right through to university, then… we need more creative, critical, and imaginative teachers and educators."

Our experts were also adamant that the future of education will evolve around a continual breakdown of the traditional linear pathway. This is not about changing school-age learning, but more about technology enabling a more fluid and customisable experience for learners of all ages.

Monash's Professor Susan Elliott stated that modern learners "have a curated world, they are used to such a personalised environment which a teacher can't necessarily create." And Dr Hourizi went so far as to argue that, "in ten years this notion of linear learning pathways will have been eroded further and possibly be almost gone." While Maya Penn commented that, "I don't think it should be unusual for people to be pretty much learning for their entire lives."

As such, the education experts were enthusiastic advocates for the idea of lifelong learning – the idea that education is something that can be returned to as and when the desire and opportunity permits itself. Mark Adams explained how,

> **If we come back in 10 years I think this notion of linear learning pathways will have been eroded further and possibly be almost gone.**

Professor Diana Laurillard
University College London

"we're letting people learn in their own time and at their own pace. It really dismantles time and place as barriers."

It was perfectly clear to our experts that a digital model encouraged people to 'learn and earn,' taking up degrees and courses that they may be unable or unwilling to attend in a face-to-face setting. As FutureLearn's Matt Jenner explained, digital technology "tends to increase access to education," opening doors for people "with accessibility or learning requirements."

This allows them to gain more professional training and means that they are less likely to be locked out of opportunities simply because they did not get the right qualifications earlier in life. By extension, it makes for a more competitive marketplace and can only benefit the wider economy. For Dylan Williams, "lifelong learning has to be a philosophy we all live by."
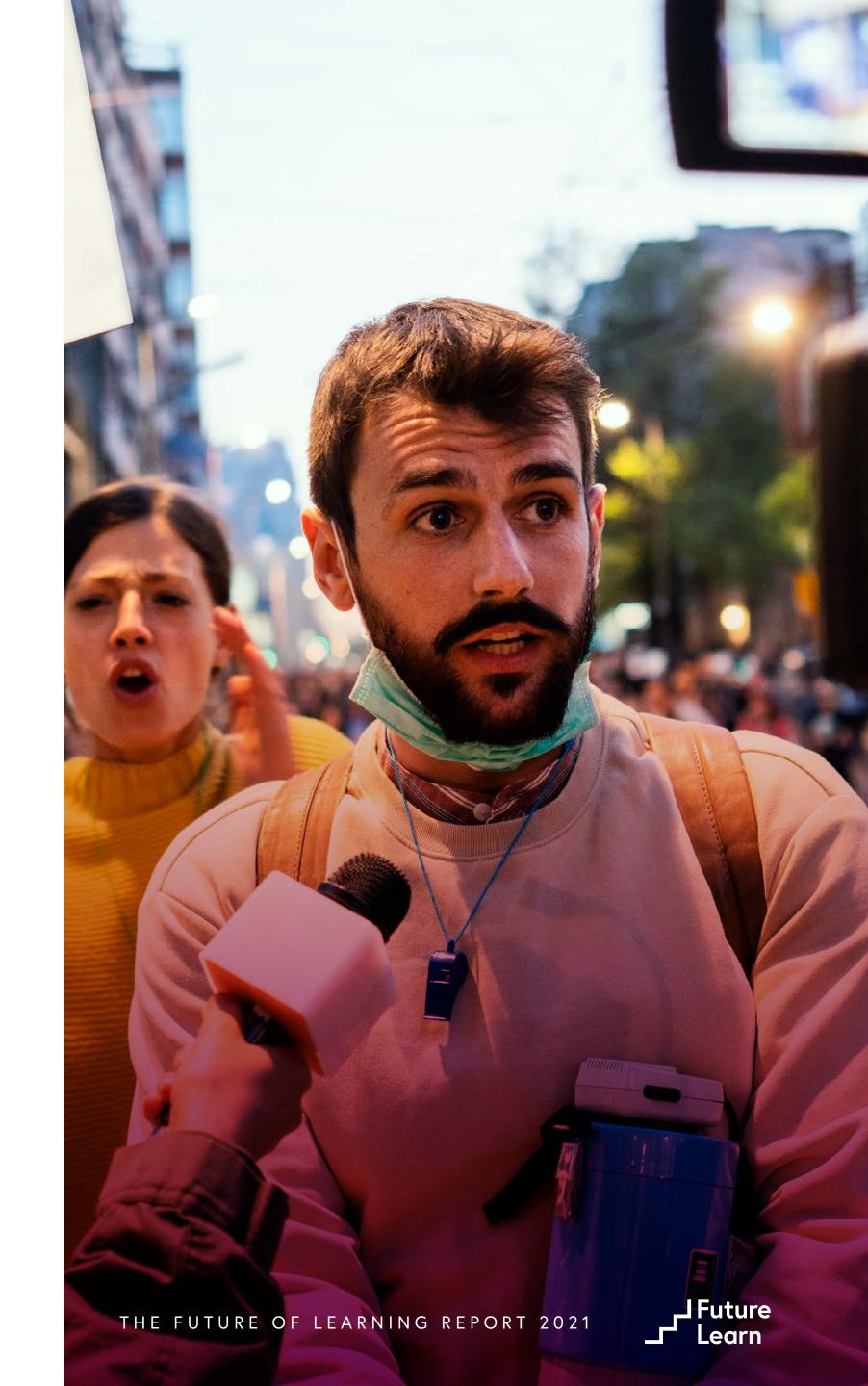
Part of these discussions was a recognition that the degree system has to change – it was seen as archaic and inflexible and does not take into account an individual's needs or circumstances. Professor Mark Brown pointed out that the current system "comes from the 19th century, not even the 20th century. And it's not fit for purpose."

Mark continued, "The idea that you can have a degree that's now disconnected from where people might use that and apply it, that's a very old and out of date view and assessment and credential is a key to this."

Nick Isles agreed that the current system is out of date, "it's very clear the demands of the economy are for both broad and specialist technical and vocational education for more people, at a younger age, in a more sensible way. And what instead we're doing is following a rather Victorian curriculum of narrow academic study for too many young people." Nick continued on what he saw as a positive, "I think our obsession with exams has been dented through COVID-19. I think that's a very good thing."

Mark Adams also agreed that the education system in general needs to change, saying, "It isn't fit for purpose in a world that's moving at such an accelerated speed. We've got to ask ourselves the hard question, is education setting us up for the world that's accelerating with the skills that really matter?"

There was a desire to see some qualifications move over to a system of microcredentialing, whereby learners are rated and assessed at different points in their journey, allowing for an ongoing feedback loop and avoiding the pressure of intensive examination periods.

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"If microcredentialing can offer us a way to move health workforces from the Philippines in a more timely way... recognising previous qualifications and skills, then the world will be in a better place.... We need to be smarter about how we identify those skills and how we bring them to the right place at the right time."

Rebecca Hall Commissioner for Victoria to South East Asia, Victorian Government

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For some, a much more qualitative assessment of learning was preferred, allowing for nuance and more sophisticated distinctions between pupils. Professor Diana Laurillard at UCL said she has "always been an advocate for profiles or portfolio assessments, so I can look at a more rounded description of what a student is and what they've achieved."

Despite their positivity and optimism, there was some concern among the experts that this vision of a new educational model can only really be achieved with more commercialisation of the sector. Many struggled with this, concerned that only the most well-off would benefit. At the same time, there was an appreciation that the education sector can open itself to more opportunities if it 'lets the private sector in'. Mark Brown acknowledged that "We shouldn't just sit on the sidelines of increasing commercialisation of education."

Mark Adams agreed, "If it was an ideal situation, I would hope to be able to rely on the public sector to drive this type of change. I'm going to be brutally honest. I haven't yet ever been convinced that the public sector has the people, the funding or the inclination to drive that kind of disruptive thinking."
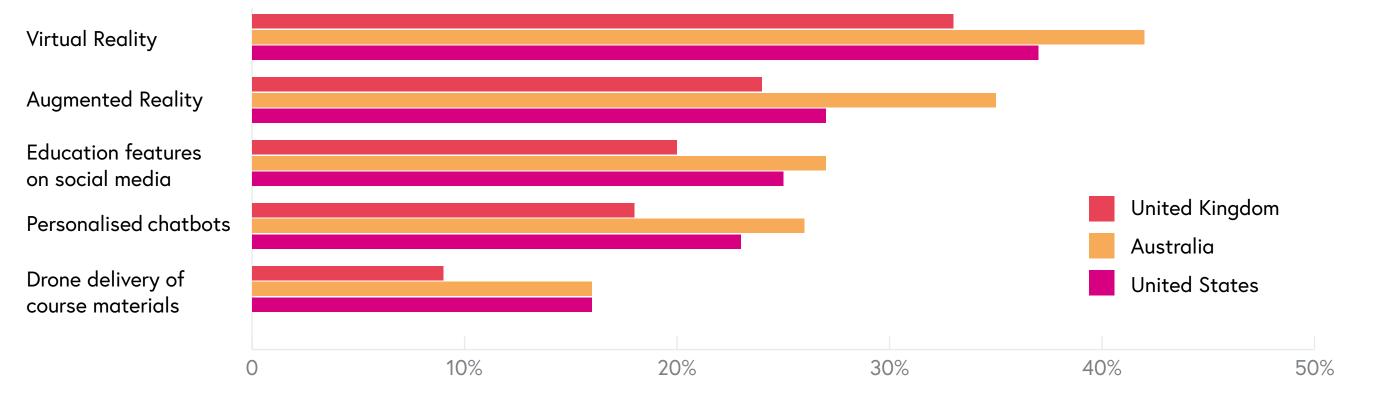
"We would be naive to think that we're going to prevent the increasing commercialization of education. We may not like some developments, particularly for-profit initiatives, but we have the opportunity as educators to engage and change that."

Professor Mark Brown
Dublin City University

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The role of technology

Respondents were shown a selection of technological innovations and asked which they would like to see in education by 2030.

When presented with a list of five technological innovations, the top selection in all three countries is virtual reality; one in three UK adults (33%) would like to see this in the education space by 2030, alongside slightly larger proportions of American (37%) and Australian (42%) adults.

Innovations in technology the public would like to see in the education space

Virtual Reality

Augmented Reality

Education features on social media

Personalised chatbots

Drone delivery of course materials

0   10%   20%   30%   40%   50%

United Kingdom
Australia
United States

" Technology is changing that model of taking three years to learn something then applying it in a workplace. "

Rebecca Hall *Commissioner for Victoria to South East Asia*

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Following virtual reality, the innovations people across the three countries would most like to see in education by 2030, in order of priority, are augmented reality, education features on social media platforms, and personalised chatbots. Relative to these options, a lower proportion indicate being interested in seeing drone delivery of course materials.

Alongside this appetite for increased innovation in education, half of adults in the UK (48%) believe that education will be delivered digitally in the future. Meanwhile, Australian adults are slightly more likely to believe this will be the case (57%) and American adults (43%) slightly less likely. Possibly linked with this is a belief that there will be better access to education; just over half of Australian adults (54%) and two-fifths of UK and American adults (42%) believe that future education will be easier to access globally.
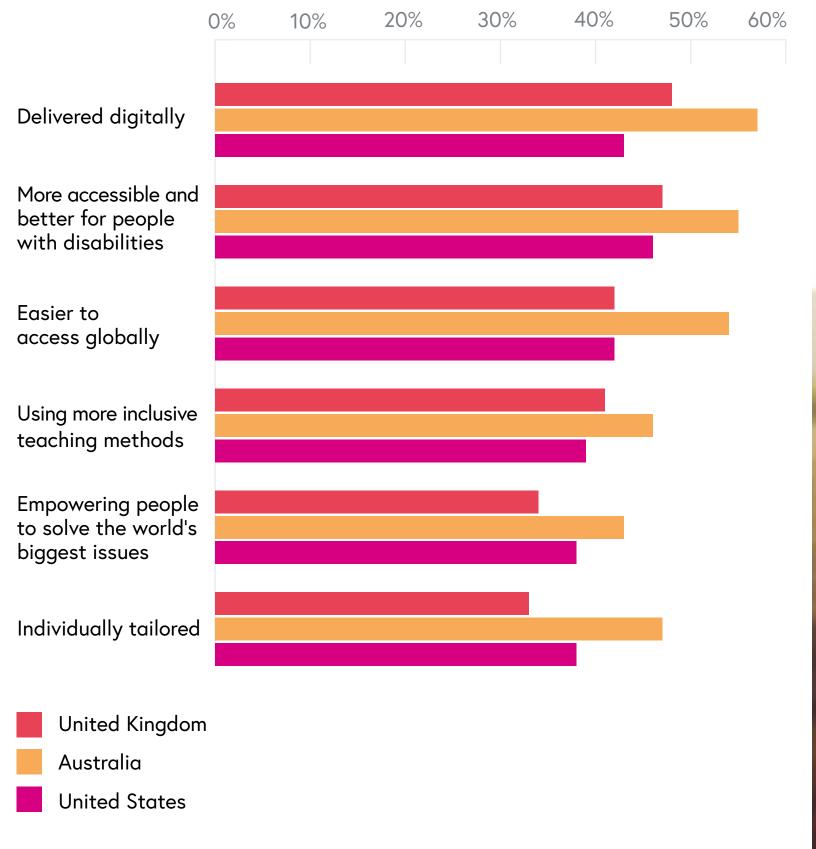
1/2 of UK adults believe education will be delivered digitally in the future

54% of Australians believe that education will be easier to access globally

Proportion who believe that in the future education will be

United Kingdom
Australia
United States

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"Technology has no ends of possibility, for example using AI to identify patterns or students at risk. I think there are lots and lots of opportunities. What we need to do as educators and consumers of education is inform the development and implementation of that technology, and not follow the technology."

Dean Patricia Davidson School of Nursing,

Johns Hopkins University

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Future education technologies

We asked our experts to think about the role of technology in the future. Many were, perhaps understandably, reluctant to make specific predictions about what this might look like. They all, however, spoke about the enormous investment potential in EdTech, which they felt will continue to grow exponentially over the coming years.

Many were especially positive about the use of augmented reality and virtual reality in a learning environment, which could help to expand the tools at an educator's disposal, and make the learning environment more fun and engaging for young people. Professor Josie Fraser went as far as to say, "AR and VR are already here. I think they will grow in use, but it requires more people to have understanding of the art."

"If you gave teachers opportunities to build lessons, some online, some physically, some through VR, some through augmented reality, and found a way to let them infuse those technologies with that genius and desire to help young minds grow, you would explode people's learning journeys."

Mark Adams VICE

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Talking technology with the experts

Moreover, technology provides opportunities outside of the learning environment. Experts talked about how data analytics and machine learning can make predictions about how individual students will behave, including difficulties they may face, and tailor individual support to them in a way that an individual teacher never could.

This is a particularly powerful idea as traditional class sizes continue to grow and as more classrooms move online. Professor Susan Elliott enthused about how, "AI will support the learning of students right from a very young age. I think it's remarkable to think of how that might complement the human teacher in the classroom."
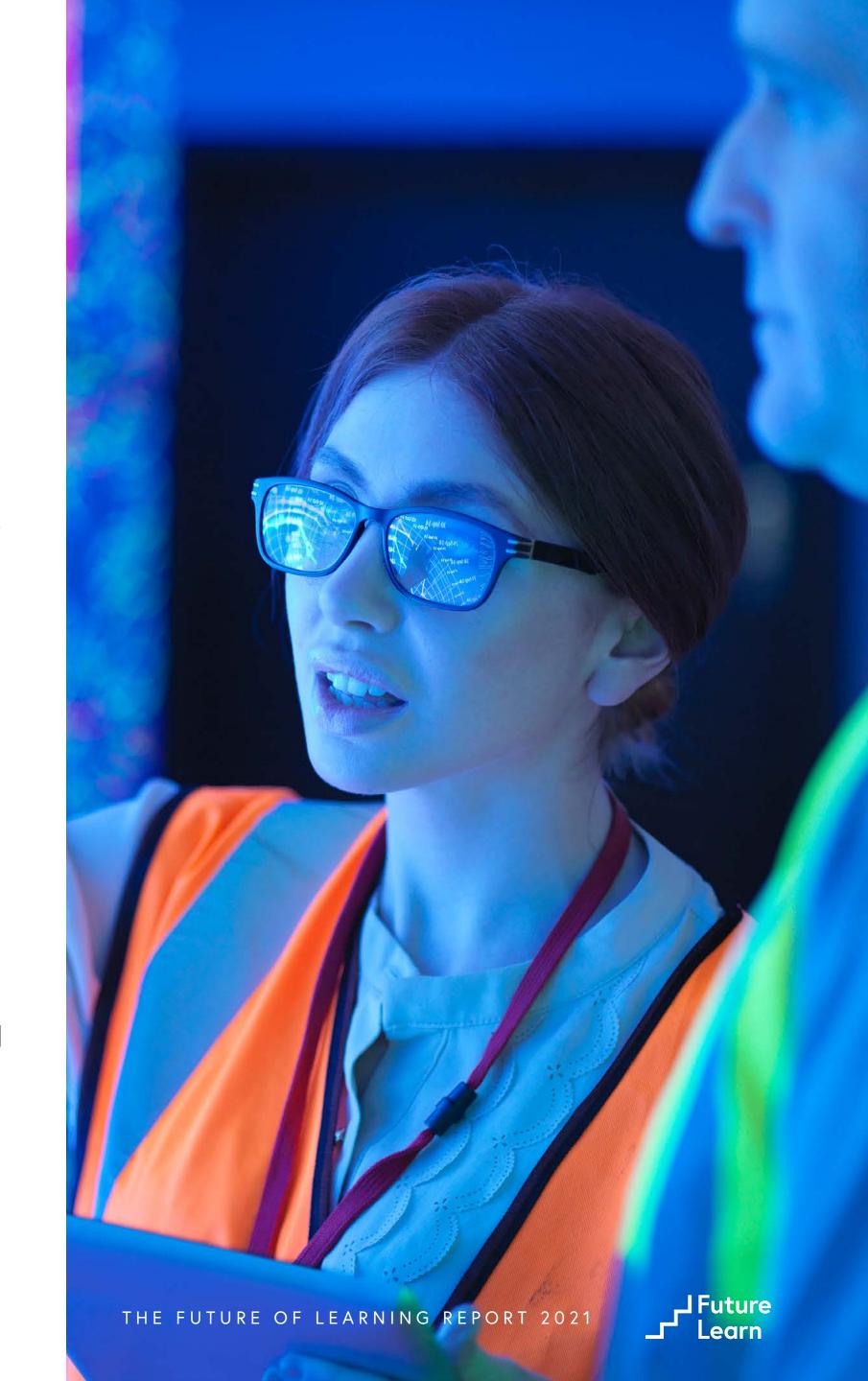
However, not all were quite so optimistic. Learners should, of course, come first, and experts felt that we should not simply continue to develop technology for its own sake. Sara Ali, Head of Culture at The Hopenclass, says that educators "need to be the ones controlling where the technology is going and that the investment from institutions and from big firms is going into the right thing."

Maya Penn agreed with that sentiment and wanted to ensure technology in education was accessible as it developed, saying, "I think that anytime that we're thinking about technological advancements within the education system and how to improve virtual learning, for example, there

needs to be an emphasis on how we can make this accessible. That should be one of the top priorities."

Maya went on to say, "There's a lack of funding around making some of these technologies more accessible so I do really challenge a lot of these companies to be really creative and innovative about how they can make it accessible."

Some were also concerned that technology should not replace dynamic face-to-face learning, but supplement it. Professor Diana Laurillard emphasised that "Big Tech think they know education. And they don't. They have really old-fashioned ideas about the nature of teaching and learning."

Mark Adams was very positive about the role of technology and especially the internet in general when it comes to the discussion around online learning and what it perhaps lacks compared to face-to-face learning. He said, "the Internet, generally, is an interconnected set of networks. That's basically what it is, and so we should be able to find some of that pastoral care that we lost in the physical space through these networks, in these communities." He continued, "We talked about recreating the world as a global village and I think that the Internet really is doing that now. It's starting to say it doesn't matter where you live. It doesn't matter how old you are. It doesn't matter. You can find your people."

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Education is a catalyst for change

A third of adults in the UK (34%) believe that, in the future, education will directly empower people to solve the world's biggest issues, such as the climate crisis and human rights abuses among others. This increases significantly to close to two-fifths of USA (38%) and Australian (43%) adults.
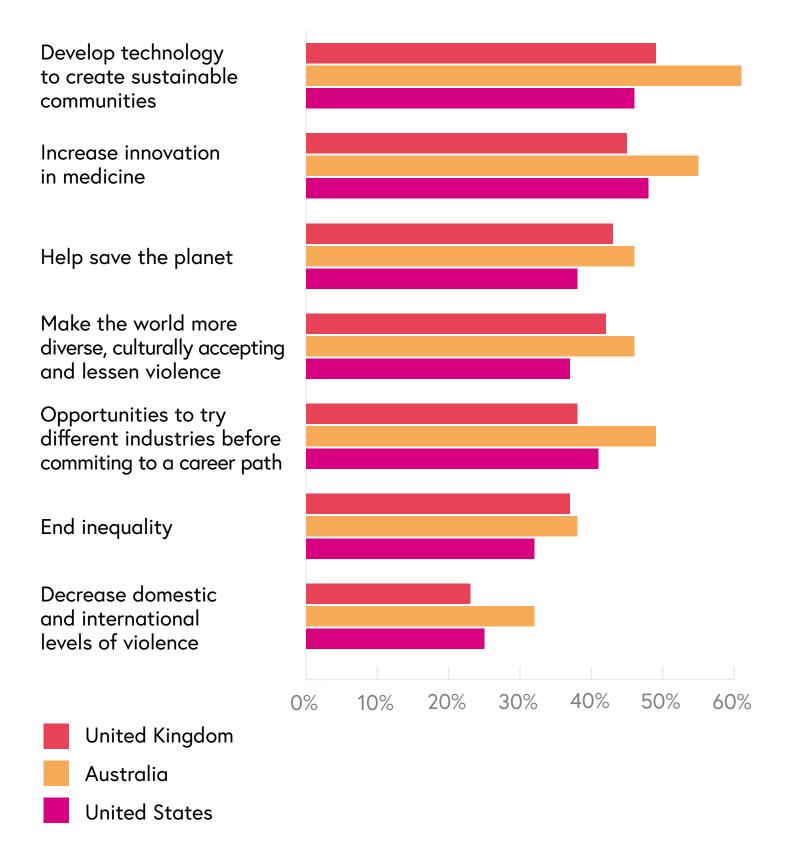
However, when looking to the future, large proportions of respondents across the three countries surveyed believe that education will have the power to develop technology to create sustainable communities. Just under half of UK adults (49%) and a similar proportion of American adults (46%) report this conviction. Overall, Australian adults are significantly more positive towards this prospect, with three-fifths (61%) making this prediction.

Australian adults continue to show the most faith in the power of education; close to half (46%) believe that education will have the power to save the planet, which is significantly higher than the proportion of those in the USA (38%), who generally tend to be the most critical about the power of education overall. Meanwhile, just over two-fifths (43%) of UK adults report that they believe education could save the planet in the future.

Experts were positive about this concept as well, and many felt that there is a greater acceleration in global access to laptops and to WiFi.

Professor Diana Laurillard agreed that technology offers vital access to the teachers and leaders in communities where education is lacking, "Some of the most challenged environments in the world still have some kind of access to technology. Adults are the community leaders in those remote environments. We can teach the people who can teach the children and give them the support they need to do that."

Proportion who believe that, in the future education will have the power to

- United Kingdom
- Australia
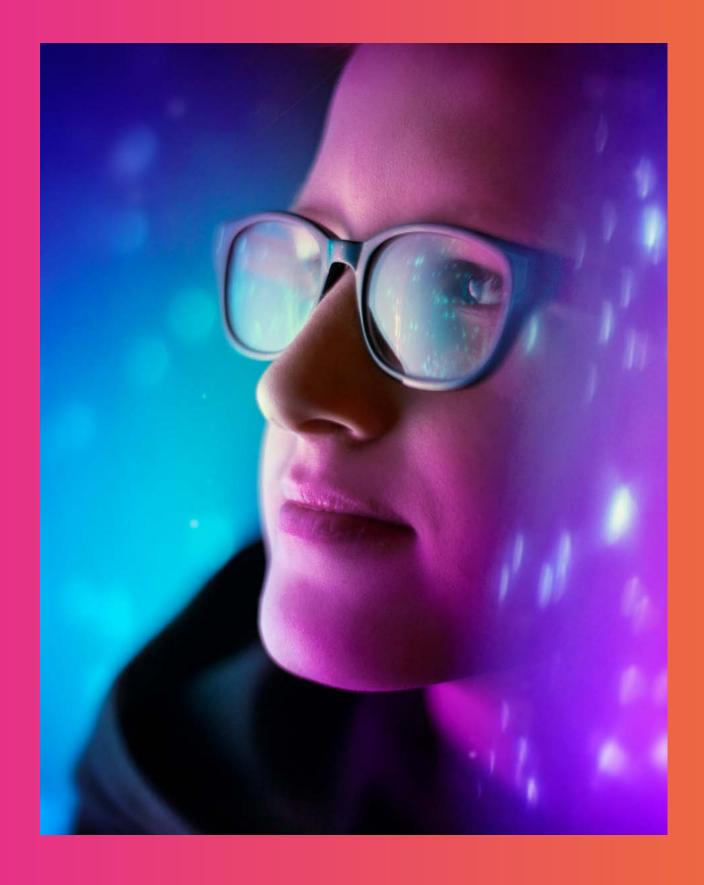- United States

The digital divide

Although most of our experts acknowledge that technology access is sufficiently widespread, many believe that the resulting digital divide that exists within countries – accelerated in part by the COVID-19 pandemic – needs to be addressed before we can truly deliver online education at scale.

As Professor Ian Dunn put it, "The fear is that it disables certain groups who don't have access to those technologies. We have to be conscious that we don't create new disadvantaged groups."

Dr Rachid Hourizi believes that personalised, well-designed learning pathways can go some way to reducing the number of people alienated from online learning. He thinks identifying what type of online learning is right for each learner and designing it accordingly, is vital: "There are some people for whom online education is exactly the right path. And without it, they would not have the opportunity they currently do. It's perfectly possible to design brilliantly useful online education, but it's equally possible to create a new set of exclusions if we design online education poorly."

"Acceleration is going to compound the problem of the digital divide. Kids who are lucky enough to have lessons on Zoom and access to digital technology are going to leap forward, but there are 1.82 million children who don't have access to the Internet who are going to be left behind, which is a significant worry."

Dylan Williams Droga 5

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Conclusion

"Huge thanks to our brilliant network of over 250 partners. We've been able to work with the most enthusiastic leaders and brands across education, industry and government during a truly transformative year."

Matt Jenner *FutureLearn*

Leading the future of learning

In order to continue making education more accessible, transformative, and inspiring for as many people as possible, there are significant challenges to overcome.

Investment in and development of education technology must work in tandem with educators and learners. This is the only way to build tools for learning and ensure digital educational experiences are relevant, meaningful and enjoyable, while adhering to universal accessibility standards.

To help learners make informed education choices, and to empower educators to adopt innovative teaching methods, it's also vital that we offer qualifications, credentials and learning outcomes that are recognised – and sought after – by employers.

And while the impact of the COVID-19 pandemic has been seismic for the industry, leaps forward are not normally so big, nor change so abrupt.

We might return to taking smaller steps forward, ones we can all manage, take part in, and benefit from. However, we also must create space for technological change because, as a global society, we must guarantee that learning truly is for everybody – and that goal must not be too far into our future.

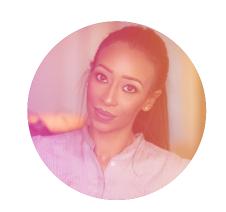**Matt Jenner** *Director of Learning, FutureLearn*

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Contributors

A huge thank you to the thought leaders and experts who shared their insights and predictions with us. Here's a bit more information about who they are and what they do.

Mark Adams
Senior Vice President and Head of Innovation, VICE

Mark's journey started in 2003 when he created the first digital transformation consultancy for celebrities and public figures. After leading the digital transformation for over 100 entertainment brands, his new start-up set strategy and upskilled teams to drive digital transformation across their business. In 2015 it was acquired by VICE where Mark became Senior Vice President and Head of Innovation.

Sara Ali
Head of Culture, The Hopenclass

An award-winning communication expert in the business of luxury, Sara has a leading perspective on legacy, heritage, social responsibility, and entrepreneurship. Sara is special advisor to two royal households and several pioneering artists, as well as Senior Consultant to Sir David Adjaye, OBE. Sara has received awards for outstanding work in fashion mentoring and for launching over 1000 female-owned creative businesses.

Professor Mark Brown
Director, National Institute For Digital Learning, Dublin City University

Mark is Ireland's first Chair in Digital Learning and Director of the National Institute for Digital Learning (NIDL). He has over 30 years' experience in Higher Education and has led the development, implementation, and evaluation of several major digital learning and teaching initiatives. Before taking up his current position, Mark was Director of the National Centre for Teaching and Learning at Massey University, New Zealand.

Dean Patricia Davidson
School of Nursing, Johns Hopkins University

Dean and Professor Patricia Davidson has been a registered nurse since 1980. Dr. Davidson is secretary general of the Secretariat of the WHO Collaborating Centers for Nursing and Midwifery, counsel general of the International Council on Women's Health Issues, and a board member of the Consortium of Universities for Global Health. In 2016, she won the Australian Museum Eureka Prize for Outstanding Mentor of Young Researchers.

Professor Ian Dunn
Provost, Coventry University

Ian led the development of Coventry University College in 2011 and was involved in the developments of campuses in Scarborough and Dagenham. He led the creation of Coventry University Online in 2017 to create a suite of fully online degrees available in partnership with FutureLearn. Ian was awarded Inspiring Leader of the year in 2016 by the Guardian Higher Education Awards.

Professor Susan Elliott
Deputy Vice-Chancellor and Senior Vice President (Education), Monash University

Professor Elliott leads a dedicated education portfolio at Monash and is responsible for providing an integrated approach to the education elements within Focus Monash. She is a Fellow of the Royal Australasian College of Physicians, and her many appointments on committees include the first female President of the Asia Pacific Association for International Education (APAIE).

Professor Josie Fraser
Deputy Vice-Chancellor, The Open University

Josie joined the OU in 2017 as Executive Dean of the Faculty of Science, Technology, Engineering and Mathematics before taking up the DVC role in 2019. She holds a BSc degree and PhD in neurobiology, but shifted towards teaching due to her passion for broadening access to STEM for under-represented groups, and technology-enhanced learning. She is a role model on the Leadership Foundation for Higher Education Aurora programme (developing women academics' leadership skills and aspiration).

Rebecca Hall
Commissioner, Victoria to South East Asia

Rebecca's role involves managing Victoria's interests within South East Asia by facilitating commercial engagements between businesses, attracting foreign direct investment into Victoria, and strengthening bilateral relationships through strategic collaboration. She leads a team of trade, investment, and education specialists based in Singapore, Indonesia, Malaysia, and Vietnam which serves 11 markets in the region.

Dr Caitlin Hayward
Associate Director, Research & Development, University of Michigan

Caitlin manages the research and development portfolio at Academic Innovation. She manages the data science and user experience research teams, and provides data analysis and research design at all stages across Academic Innovation. Prior to this, Caitlin co-founded the GradeCraft platform while completing her PhD in Information Science, with a focus on learning analytics, the theoretical foundations of gameful pedagogy, and novel educational technologies.

Dr Rachid Hourizi
Director, Institute of Coding

Rachid has been Director of the Institute of Coding (IoC) since its launch in 2018. He previously worked on national and international Human-Computer Interaction (HCI) research and teaching coding, digital skills and entrepreneurship at the University of Bath's Department of Computer Science. Amongst other initiatives, Rachid led efforts to launch the UK's first Masters level digital skills degree apprenticeship.

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Ranata Hughes
Visiting Instructor/Internship
Coordinator, School of Journalism
& Graphic Communication,
Florida A&M University

Ranata has worked as a public relations practitioner for over ten years, specializing in the areas of non-profit and agency PR. The SJGC alumna holds a Bachelor of Science degree in public relations along with a Master of Science degree in integrated marketing communications from Florida State University. She is the adviser of the FAMU chapter of Public Relations Student Society of America.

Nick Isles
CEO, Condé Nast College
of Fashion & Design

Nick is an experienced writer, researcher and consultant with over 20 years' experience of engagement with organisations across the private, voluntary, and public sectors. In recent years he has specialised in working with a wide number of universities in the UK and elsewhere. He has delivered leadership development programmes for Henley Business School and has been a visiting lecturer at Nottingham University Business School.

Professor Diana Laurillard
Professor of Learning with Digital
Technologies, UCL Knowledge Lab

Diana is the former Head of the e-Learning Strategy Unit at the Department for Education and Skills, and Pro-Vice Chancellor for learning technologies at the OU. Diana is also the author of 'Teaching as a Design Science', and holds a Lifetime Contribution Award from the E-Assessment Association, as well as an Honorary Life Membership at the Association for Learning Technology.

Maya Penn
Entrepreneur and
CEO of Maya's Ideas

Founder, CEO, environmental activist, artist, eco-designer, and three-time TED Speaker Maya Penn founded her brand Maya's Ideas at just eight years old from a passion for art and design and a drive to tackle the negative impact the fashion industry has on the environment. Penn was named one of Oprah's SuperSoul 100 list of visionaries and influential leaders in 2016.

Dylan Williams
Chief Strategy Officer,
Droga 5 and MD at Accenture

Dylan started his career at BBH as a Strategic Planner. He was promoted to the BBH board as its youngest-ever director and shareholder. In 2004, he became the first Chief Strategic Officer at Mother London. Dylan then joined Publicis Worldwide as Global CSO in 2014. He also launched the Publicis Drugstore, an innovation facility that fosters relationships between start-ups and multinationals.

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For enquiries about the report, email media@futurelearn.com

Research methodology

Background

In 2020, FutureLearn commissioned YouGov to undertake a global study to interrogate and explore the future of learning. This was shaped around the key themes of personal development, career aspirations, the power of education and online learning, and expectations for education in the future.

For the purposes of this research, online learning was defined as: "virtual learning or learning over the internet (in contrast to traditional learning that takes place in a physical space). This does not include learning through social media posts e.g. Twitter, Instagram, TikTok (although this trend is referenced in the report). Online Learning includes (but is not limited to) companies and websites such as FutureLearn, Coursera, EdX, Cavas, Codecademy, Udacity, Khan Academy, Udemy, TED-Ed and digital offerings from traditional schools and universities that offer various online learning options from online resources to structured learning online."

Approach

Quantitative Stage

Survey fieldwork was carried out among nationally representative samples of adults aged 18+ in the UK, USA and Australia between the 2nd and 7th December 2020. The survey was conducted online using YouGov's online research panel and the results were weighted to be representative of each country's adult population.

The sample sizes were 2,200 adults in the UK, 1,182 adults in the USA, and 1,040 adults in Australia. To obtain a representative sample of these countries' populations, sampling quotas were placed on age, gender and region, as well as socio-economic status in the UK.

Throughout the report, references are made to Millennials and Generation Z. For the purposes of this analysis, Millennials have been defined as those born between 1981 and 1996, and Generation Z as those born from 1997 onwards.

Analysis by generation and gender is conducted at the total sample level, based on combined data from the UK, USA and Australia. These combined samples are not proportionally weighted to each country's relative population, and therefore should not be treated as representative.

Qualitative Stage

Following on from the surveys, fifteen online interviews were conducted with sector experts. The purpose of these expert interviews was to explore the key survey themes in greater depth and add specialist insight to the findings. The qualitative insights are designed to supplement the quantitative data in this report.

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