

The Global Learner Survey

September 2019



Pearson

Embargoed until 17th September



Contents

| | |
|----|--|
| 03 | Opportunity in the Era of the Talent Economy |
| 04 | Methodology |
| 05 | Key trends |
| 06 | People are moving beyond traditional learning |
| 14 | An era of reinvention |
| 19 | A global upskilling divide is emerging |
| 23 | Human skills are more important than ever |
| 29 | Confidence in educational institutions is wavering |
| 37 | Self-service learning not only exists, but will increase |
| 42 | Digital and virtual learning |
| 46 | School safety, online bullying and social media |
| 49 | Contacts |



Opportunity in the Era of the Talent Economy

A learner-driven revolution in education is unfolding around the world. That's the message from the 11,000 people who responded to the inaugural Pearson Global Learner Survey, a new study capturing the opinions of learners worldwide.

As these learners well know, we are in the midst of the single biggest economic shift since the Industrial Revolution. Technology, automation, globalization and an unpredictable political environment are affecting everything about our world — especially work and education.

Pearson conducted this study so learners in 19 countries could have their say on subjects such as the quality of their nation's education system; careers and the future of work; and technology. It's the first time the world has heard the collective voice of this many learners on such a wide range of education topics.

Around the world, learners still place a great deal of faith in education to help them achieve success. But, the way they are obtaining that education is changing and it's all because the new talent economy has arrived with its gig jobs, unconventional career paths and tech disruption. To meet the demands of this new world of work, learners tell us they are relying less on traditional institutions that have shaped learning for generations and are adopting a "do-it-yourself" approach to education.

This opens a new universe of opportunities to help people learn in more accessible ways, more affordably and with better outcomes. The learners in our survey embrace technology and online learning. They also want more vocational education, soft skills training and bite-size learning across the course of their lifetime. Virtual learning for children, online degrees and micro and stackable credentials for adults and on-demand learning for everyone can help meet the needs of today's sophisticated learner.

Governments, educational institutions, employers and social and tech disruptors are uniquely positioned to apply their vast and unique expertise to help drive this change. The smartest of these innovators already know what the learners in our survey do: that generations of career paths are increasingly outdated. As we embrace the talent economy together, we also need to embrace the lifelong learning that comes with it. Higher education is beginning to do that by re-imagining the learning opportunities it offers with online courses and degrees. More employers now see education, like healthcare, as an employee benefit. Vocational training, like Pearson's BTEC offering in the UK, is giving people more career pathways than ever before.

But we shouldn't stop there. We should be building a wider ecosystem to meet the needs of the learners in our study. Universities should expand access to mid-career adults with short courses, soft skill training and stackable credentials. Employers could be working together with learning institutions to re-skill their workforce. Innovators and education companies can use technology to make education engaging and accessible and government can help address ways to make education more affordable and widely available.

Most importantly, we need to understand what learners think about these solutions. Our survey starts this conversation but there is still a long way to go. By embracing learners and listening to their voice, we can all help lead the growth of a new economy. The advances of the 21st century have given us the greatest opportunity in human history to improve lives through education.

I look forward to seeing the progress we will achieve together to make the learner's vision a reality. Here's to all the learners around the world!



John Fallon, CEO Pearson



Methodology

This survey was conducted on behalf of Pearson in May 2019 by The Harris Poll, a global market research firm based in NYC with over 50 years of history in polling. A 20-minute online survey was completed by 11,083 people aged between 16-70 years old across the globe. All pages show general online population data unless noted otherwise.



Results are weighted for age, gender, region, urbanicity, race/ethnicity, education, marital status, household income, and/or socio-economic status to align respondents with actual proportions in their respective countries. Survey respondents were selected based on their age and quality of response from leading online research panels.

| Markets | Sample Size | Margin of Error |
|---|-------------|-----------------|
| Global | n=11,083 | +/- 0.90 |
| US | n=1000 | +/- 3.00 |
| UK | n=1001 | +/- 3.00 |
| Australia | n=1000 | +/- 3.00 |
| Canada | n=1001 | +/- 3.00 |
| South Africa | n=1001 | +/- 3.00 |
| Brazil | n=1000 | +/- 3.00 |
| China | n=1000 | +/- 3.00 |
| India | n=1000 | +/- 3.00 |
| Europe excl. UK (Italy, Spain, Germany, France) | n=1004 | +/- 3.00 |
| Hispano-America (Mexico, Argentina, Colombia) | n=1043 | +/- 2.94 |
| Middle East (UAE, Saudi Arabia, Turkey, Egypt) | n=1033 | +/- 2.96 |

Key Trends

Our survey uncovered eight key trends that learners across the globe tell us characterize the way they seek education in 2019.

1 A DIY mindset is reshaping education.

With ready access to technology and a changing global economy, people are taking matters into their own hands. They are patching together their education from a menu of options and they believe that self-service learning will become even more commonplace as people seek education across their lives.

2 The 40-year career is gone, replaced by life-long learning and diverse career paths.

The talent economy has arrived and the traditional, linear career path is a thing of the past. Learners are molding education into what they need for today's work world, which means 'bite-sized' learning across their entire life.

3 People expect digital and virtual learning to be the new normal in the next decade.

People are using technology in every aspect of their lives and they are now embracing it as part of their education. From online degrees, artificial intelligence (AI) tools and smart devices, people see the future of learning made easier and more engaging with technology.



4 Confidence in educational institutions is wavering.

Many around the world feel education somehow isn't working for them. It's failing their generation, not preparing them for work, is too costly, or out of reach.

5 Some young workers think you can do OK in life without a college degree.

The incoming workforce in many countries is open to alternative pathways, especially vocational training.

6 Markets like China and India are leading the world in upskilling while the US and UK lag behind.

Workers in China, India, Brazil and Hispano-America are upskilling at far higher rates than their US and UK counterparts, driven in large part by the influence of technology and automation on their jobs.



7 Learners believe soft skills will give them the advantage over automation.

While STEM skills aren't forgotten, people realize the skills which make us uniquely human are actually the hardest to learn. Skills like creativity, originality, problem-solving and the ability to learn give humans an advantage over machines and learners say they need help mastering them.

8 People now cite social media and bullying as contributing factors to school safety concerns.

Acts of violence have always been the main driver of concerns over school safety. But now learners say that online bullying and social media are making school more difficult for today's students.

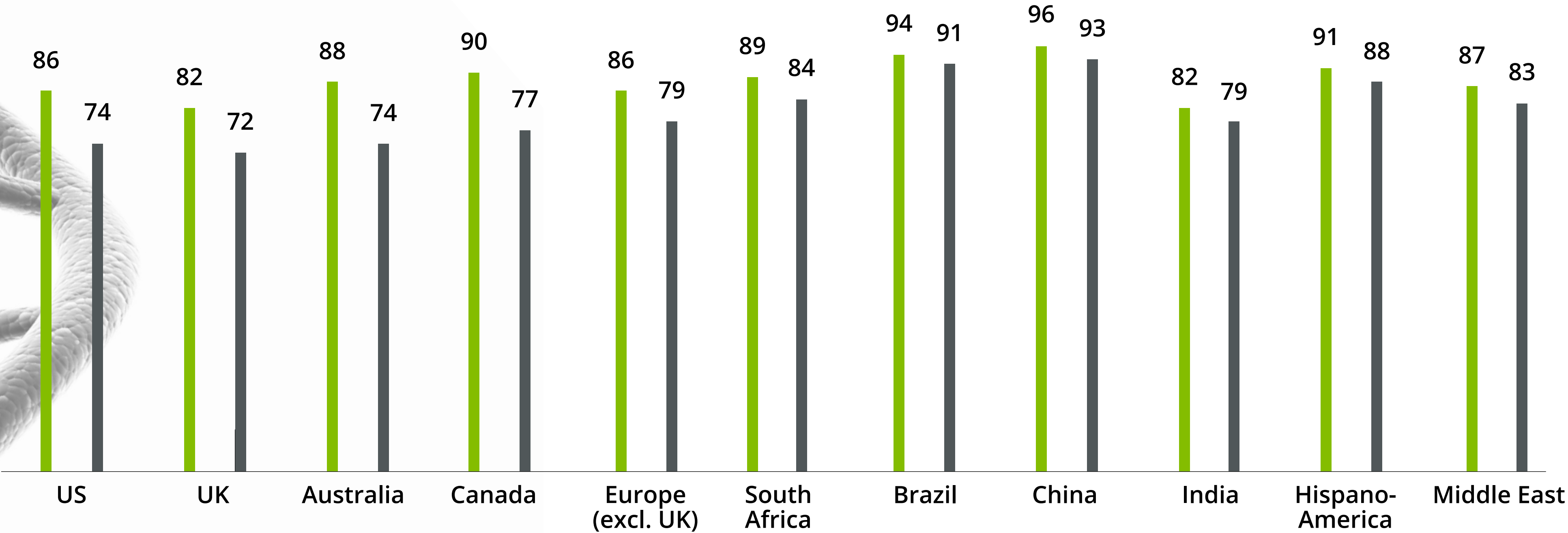
People are moving beyond traditional learning

The incoming generation of workers value college education as much as previous generations — but they place similar value on alternatives, such as vocational or trade training.



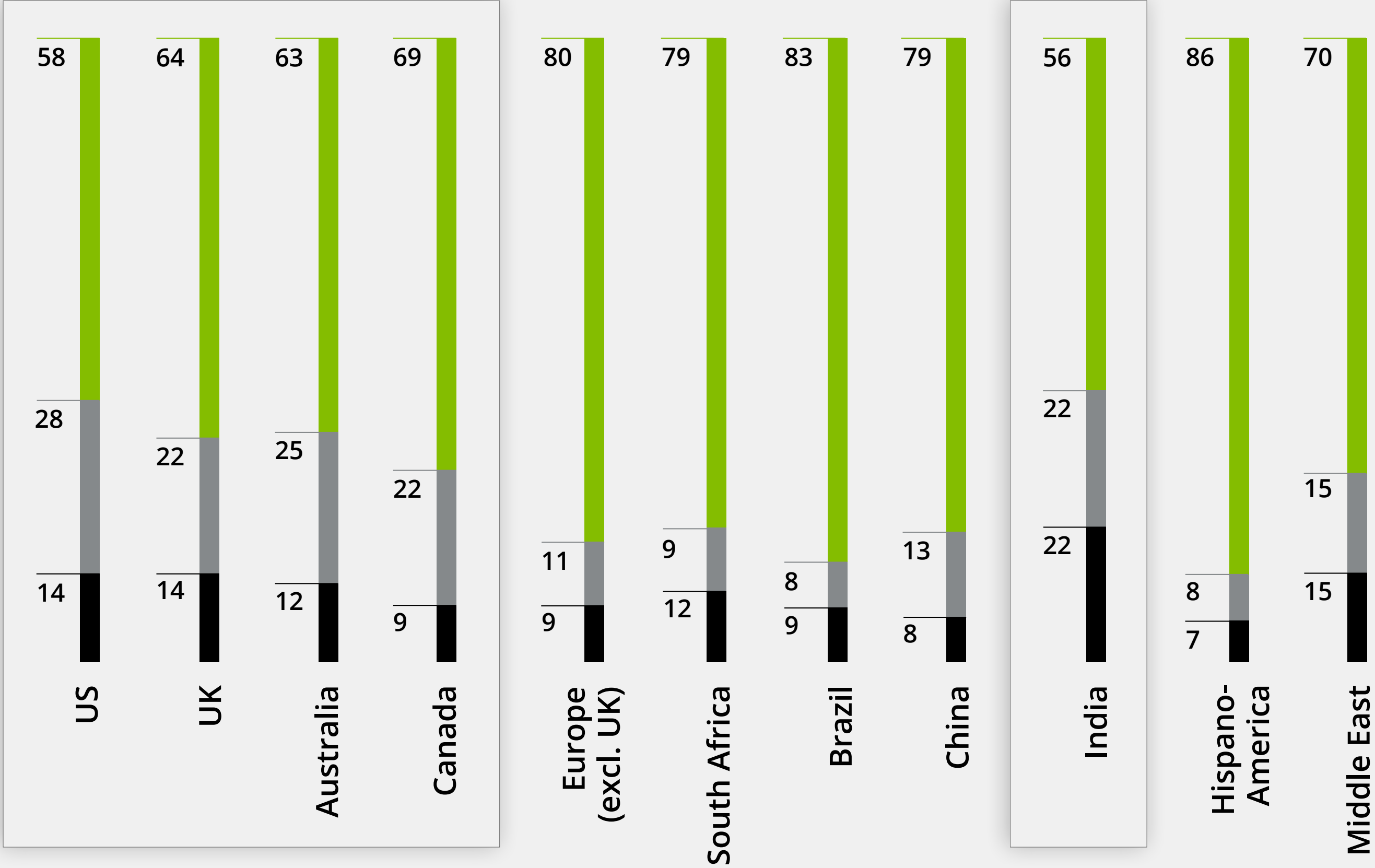
Education is in our DNA:

People agree education has played a significant role in shaping their identity



Thinking about the role that education has played in your life or that of other people, how strongly do you agree that: (%)

■ Education helps people live a better life. ■ My education has played an important role in shaping who I am as a human being.



Formal education still reigns supreme but a more relaxed attitude is emerging

Which of the following best describes your view on formal education? A formal education is... (%)

- An important stepping stone. You need to invest in it to achieve your work and life goals.
- Nice, but not necessary.
- Not relevant today. You can create your own success and prosperity without it.



Those we surveyed in the **US, UK, Australia, Canada and India** indicated growing ambivalence towards traditional notions of education. Meanwhile, those in **China, Brazil, South Africa, Hispano-America, the Middle East and Europe (excluding the UK)** still place great value on a college education.

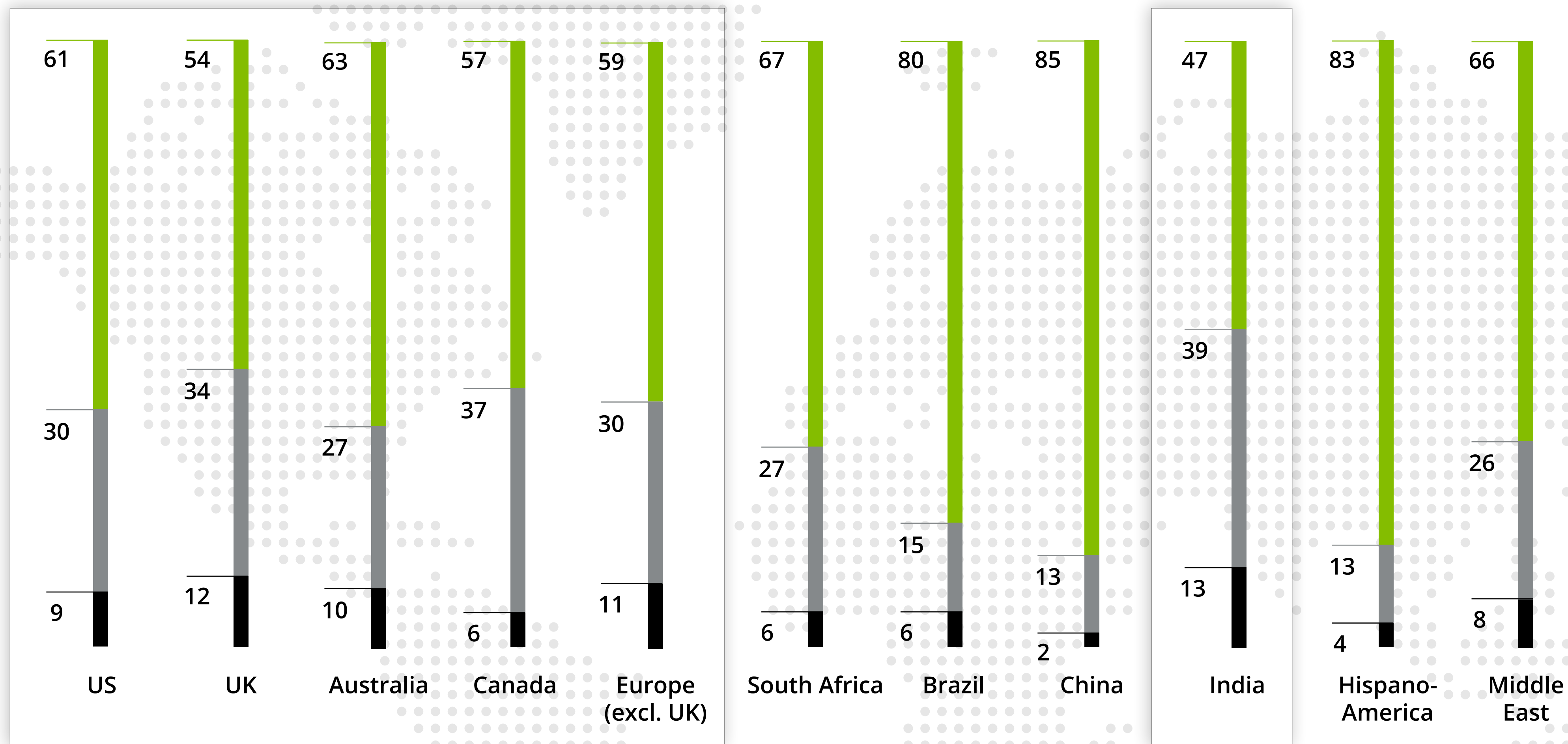
In hindsight, many would take an alternate path to learning

Which of the following best reflects your opinion about your higher education experience? If I had to make the choice again... (%)

Asked among those with post-secondary educational attainment

(which includes higher ed. coursework, degrees, certifications, vocational, etc.)

- I would still go to college.
- I would get some kind of trade or vocational training instead of college.
- I would go straight to work after leaving high school or secondary education.



The career divide: almost half of those in the US, UK, Australia, Canada, and Europe don't think that higher education prepared them for their career



Which of the following best reflects your opinion about your higher education experience? (%)
Asked among those with post-secondary educational attainment (which includes higher ed. coursework, degrees, certifications, vocational, etc.)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|----------------------------------|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Did prepare me for my career | 56 | 49 | 58 | 58 | 55 | 60 | 67 | 67 | 63 | 71 | 64 |
| Did NOT prepare me for my career | 44 | 51 | 42 | 42 | 45 | 40 | 33 | 33 | 37 | 29 | 36 |

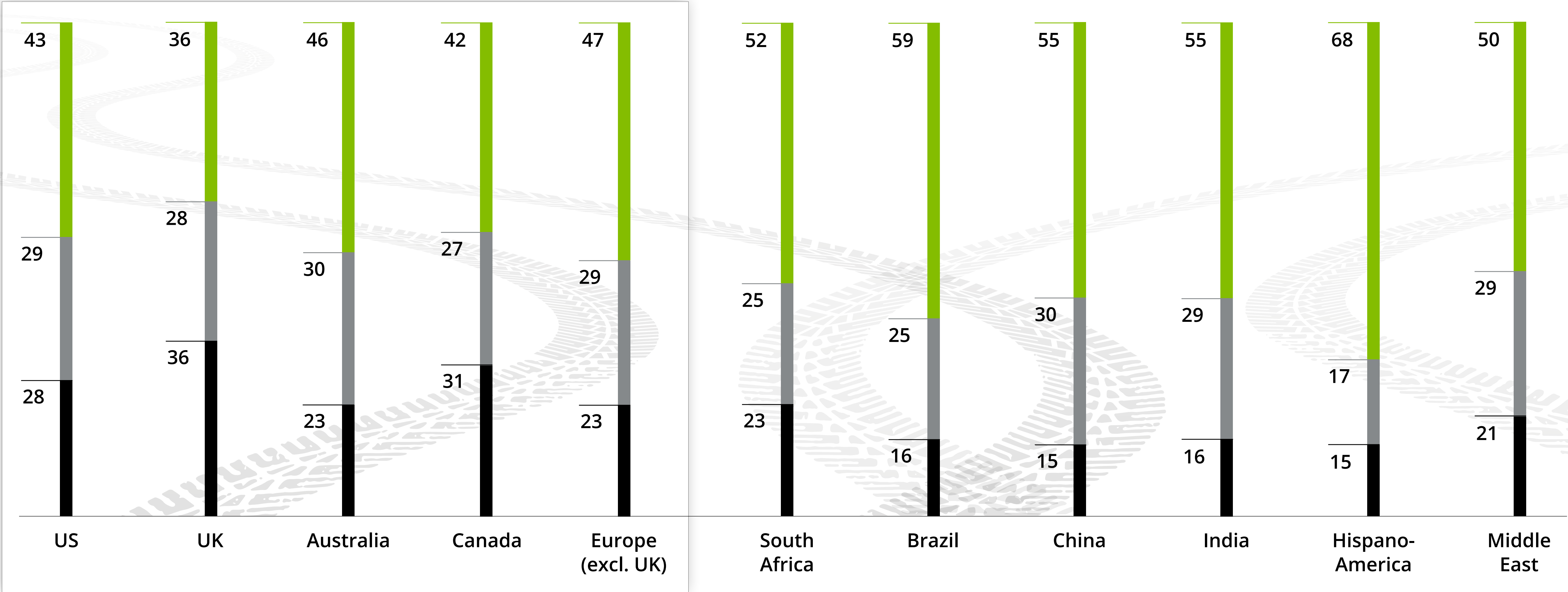
High % believing you can do OK without a college degree

People think subject majors don't have a major impact on career paths

In the US, UK, Australia, Canada, and Europe many people are not working in fields that they majored in. People in China, India, Brazil, and Hispano-America tend to be more pragmatic — choosing careers that were related to their subject majors. This could be impacting their perceptions around the value of education.

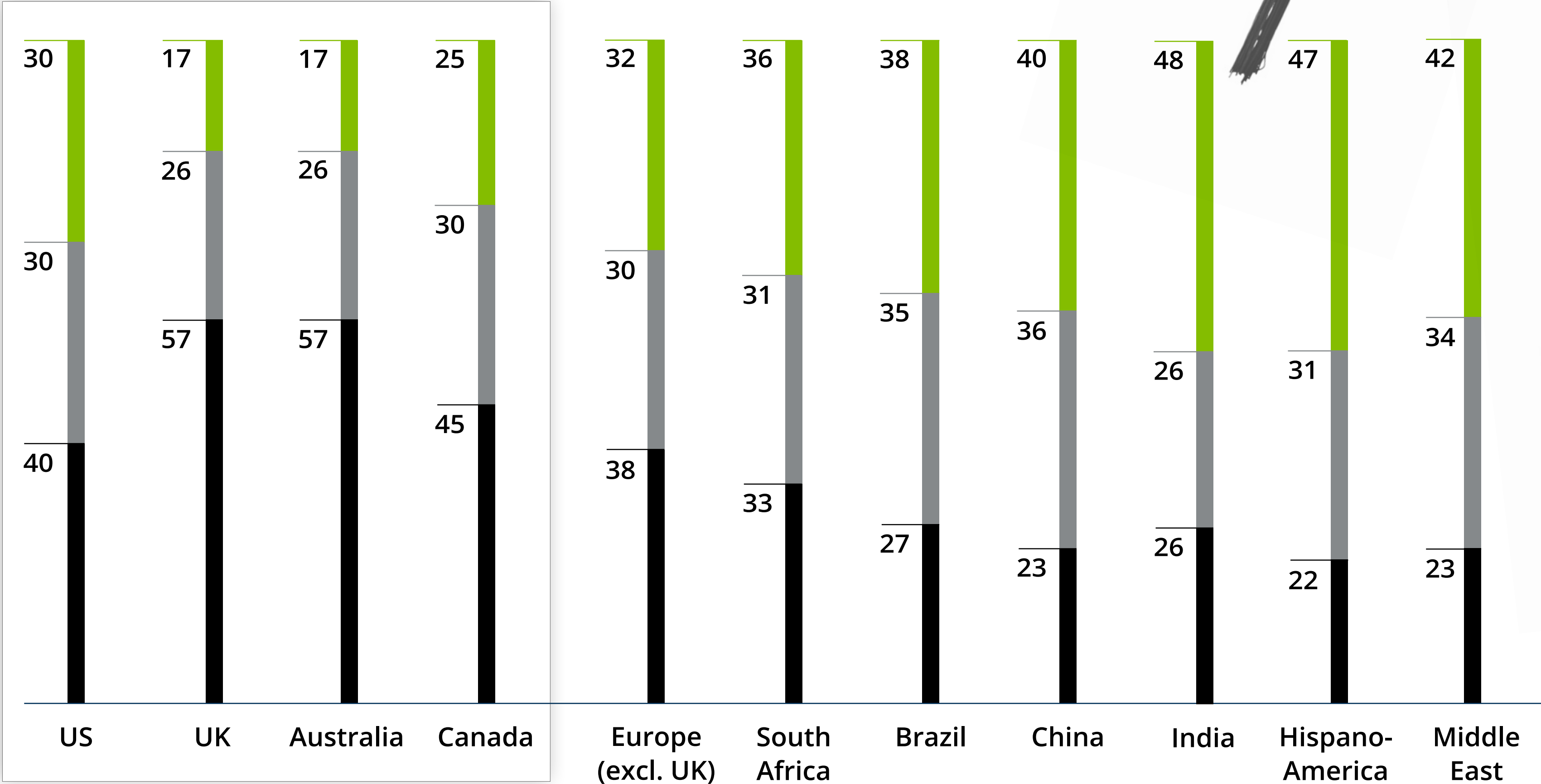
Which of the following best reflects your opinion about your higher education experience? (%)
Asked among those with post-secondary educational attainment (which includes higher ed. coursework, degrees, certifications, vocational, etc.)

- I chose a career related to the subject matter that I majored in.
- I initially chose a career related to the subject matter that I majored in, but I eventually changed careers.
- I didn't choose a career that directly reflects the subject matter I majored in.



People are thinking beyond university degrees for their futures

While markets like China, India, Brazil, South Africa, the Middle East and Hispano-America are more likely to see the value of a traditional college degree, those responding to our survey in the US, UK, Australia and Canada increasingly believe that you don't need a college degree to succeed.



Half of Gen Z in the US, UK and Australia say you can do OK in life without a degree.

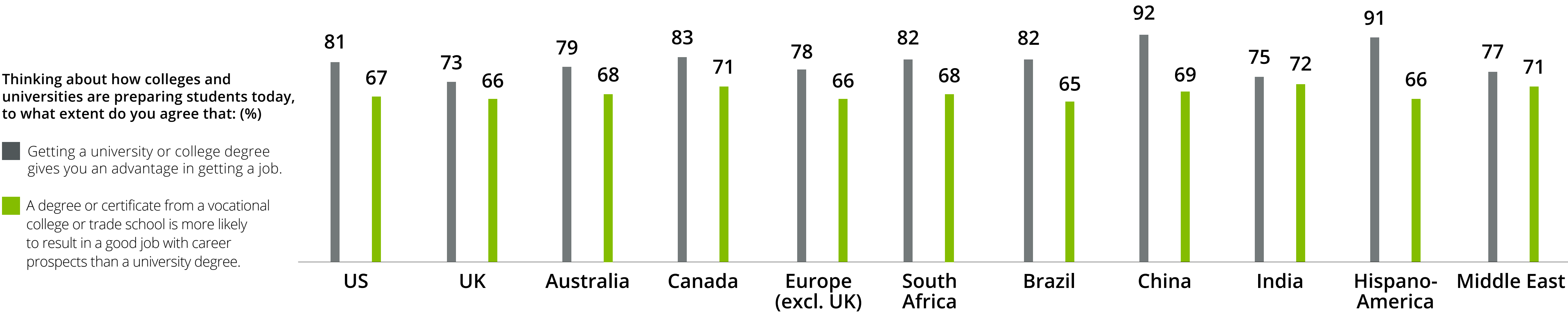


Which of the following statements best reflects your opinion regarding higher education (colleges and universities)? (%)

- A college degree is essential to achieving a successful and prosperous career.
- You need some college education (courses, associate's degree, or certificate) to make a decent living.
- You can do OK in life today without a college degree.



Vocational and trade schools are strong alternatives to a university degree



The 40-year career is giving way to an era of reinvention

The traditional, linear career path is a thing of the past. People are molding learning and work into what they need it to be in today's world, which means life-long learning and diverse career paths.

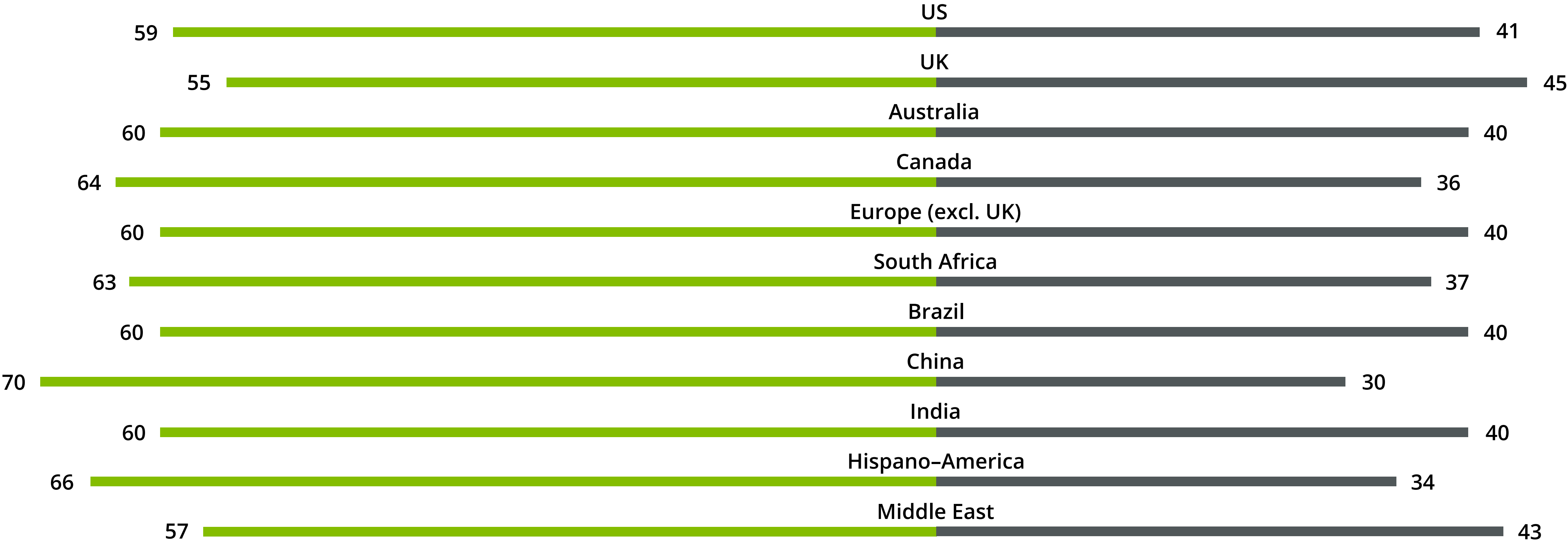


The traditional classroom is being turned upside down

Education is anywhere, all the time; not just in traditional academic settings, and not just for young people.

Which of the following statements best reflects your opinion on the education system globally, including primary, secondary and higher education? (%)

- The world is shifting to a model where people participate in education over a lifetime.
- Education still happens mostly for children and young adults in academic settings.

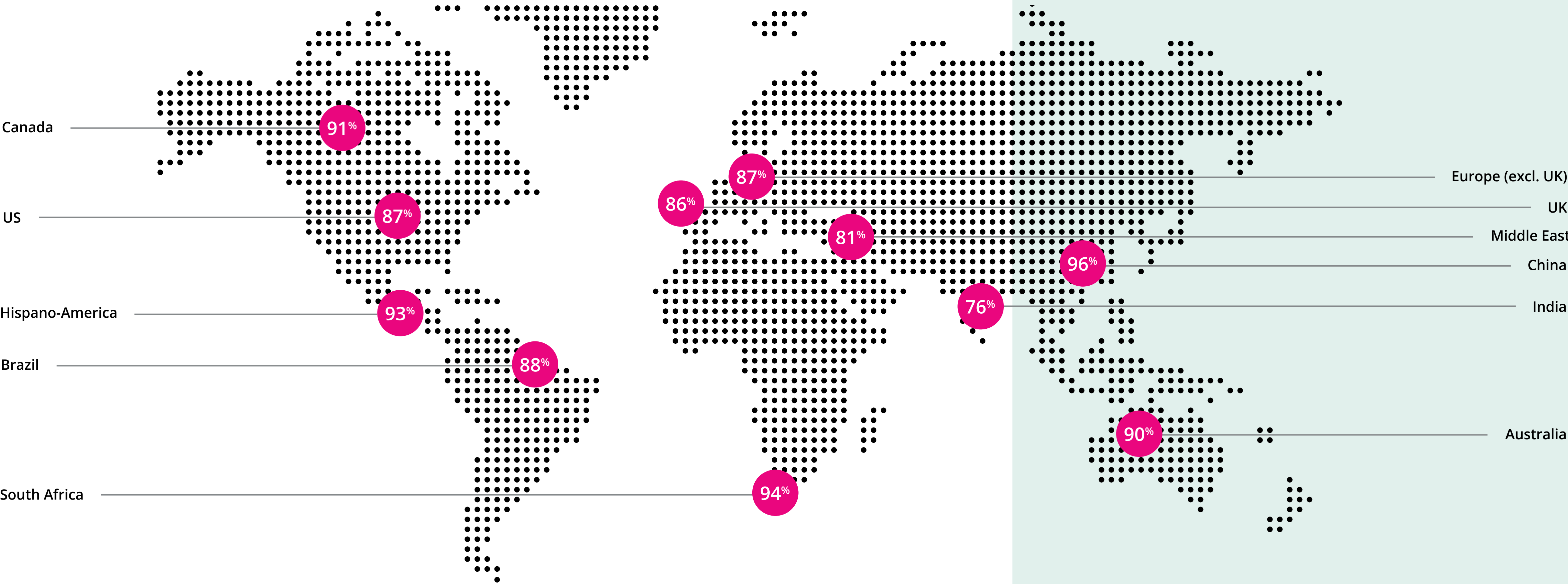


What you learn tomorrow is as important as what you learned in school

Globally, everyone believes that you need to keep learning even after you leave college to stay relevant in your career.

Thinking about how colleges and universities are preparing students today, to what extent do you agree that: (%)

Education doesn't stop at school. People need to keep learning or re-training throughout their career to stay up-to-date.





The traditional career path is giving way to a reinvention mindset

Globally, **70%** of people agree that the notion of working for one employer for your entire career is old-fashioned, meanwhile **84%** of people globally agree with the statement that 'my career path will be significantly different from my parents or grandparents'.

| Thinking about your personal development and career path, to what extent do you agree...? (Showing % agree) | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| The notion of working for one employer for your entire career is old-fashioned | 64 | 65 | 70 | 64 | 73 | 75 | 64 | 77 | 76 | 72 | 73 |
| My career path will be significantly different from my parents or grandparents | 84 | 81 | 85 | 85 | 80 | 93 | 85 | 90 | 74 | 91 | 79 |
| I think I will change career at some point in my life | 61 | 64 | 68 | 55 | 55 | 77 | 72 | 83 | 74 | 59 | 70 |
| I like reinventing myself at work every few years by learning new skills | 73 | 69 | 75 | 73 | 75 | 91 | 84 | 88 | 81 | 91 | 81 |

Personal reinvention and new careers are replacing retirement

Globally **65%** think that the notion of traditional retirement is old-fashioned. Many are eschewing free time and hobbies in favor of part-time jobs, starting a business, or starting a second career.

Thinking about your personal development and career path, to what extent do you agree...? (Showing % agree)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| I think the notion of traditional retirement is old-fashioned | 59 | 58 | 59 | 56 | 66 | 75 | 64 | 68 | 76 | 61 | 71 |

Which statement most applies to how you think of retirement? When I retire from my job... (%)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|--|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| I hope to spend time only on hobbies or leisure, not work at all | 36 | 41 | 39 | 40 | 43 | 26 | 26 | 35 | 19 | 31 | 24 |
| I'd love to start a second career doing something I love | 14 | 10 | 12 | 12 | 14 | 20 | 21 | 28 | 20 | 14 | 25 |
| I hope for a part-time job to get some form of income | 17 | 19 | 19 | 20 | 15 | 11 | 17 | 16 | 15 | 16 | 15 |
| I want to start my own business | 14 | 12 | 11 | 8 | 9 | 37 | 26 | 7 | 25 | 30 | 26 |
| I'd love to take some college classes for fun | 7 | 10 | 6 | 8 | 8 | 4 | 8 | 13 | 15 | 7 | 6 |
| I'm not currently working and I don't plan to work | 12 | 8 | 13 | 11 | 10 | 1 | 2 | 1 | 5 | 2 | 4 |

A global upskilling divide is emerging

Workers in China, India, Brazil and Hispano-America are more likely to retrain or upskill for their jobs than those in the US and in the UK.

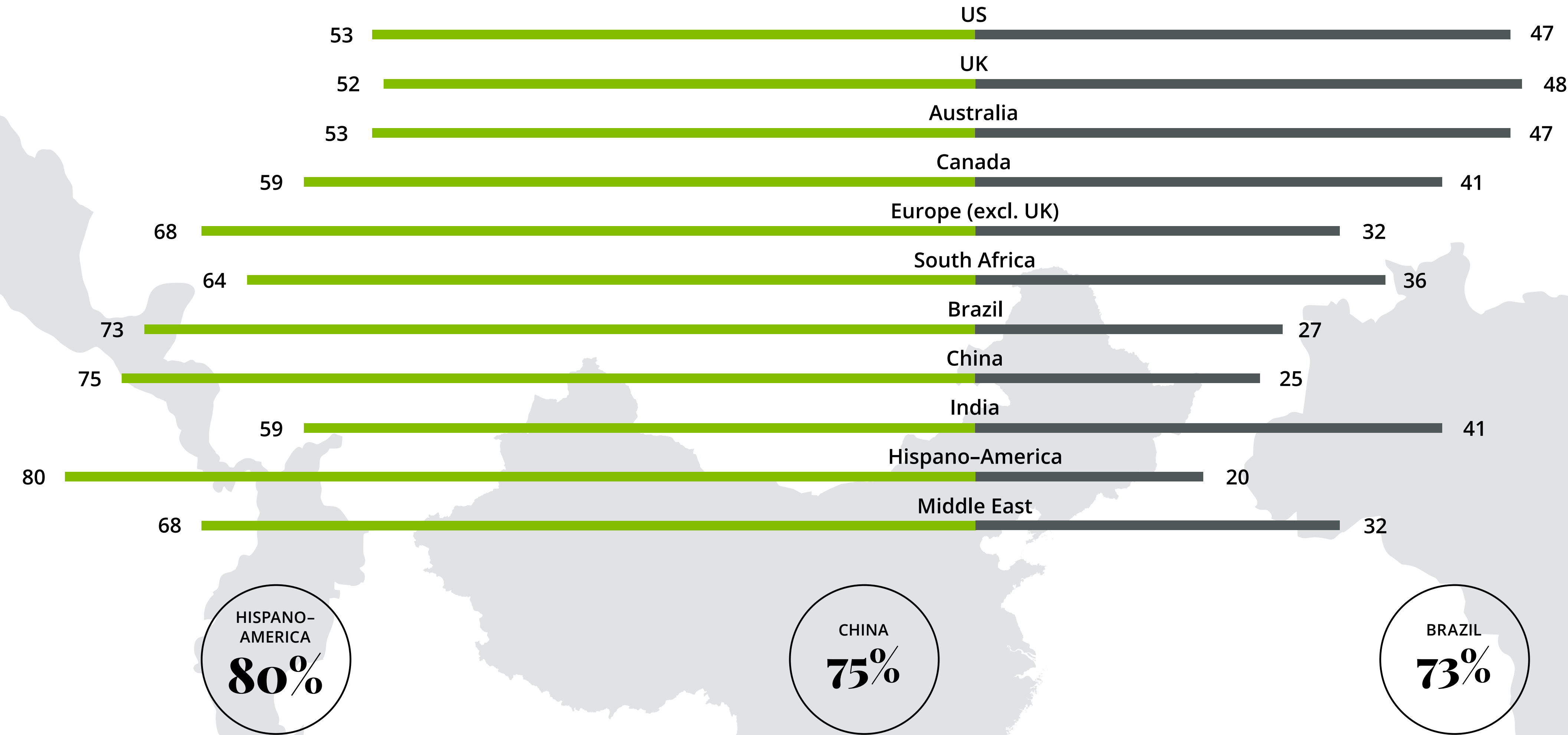


In Hispano-America, China and Brazil, education is the answer to building the global economy

Hispano-America, China and Brazil in particular show serious focus on how education can move the global economy; this sentiment is lowest in the US, UK, and Australia.

Which of the following statements best reflects your opinion on the education system globally, including primary, secondary and higher education? (%)

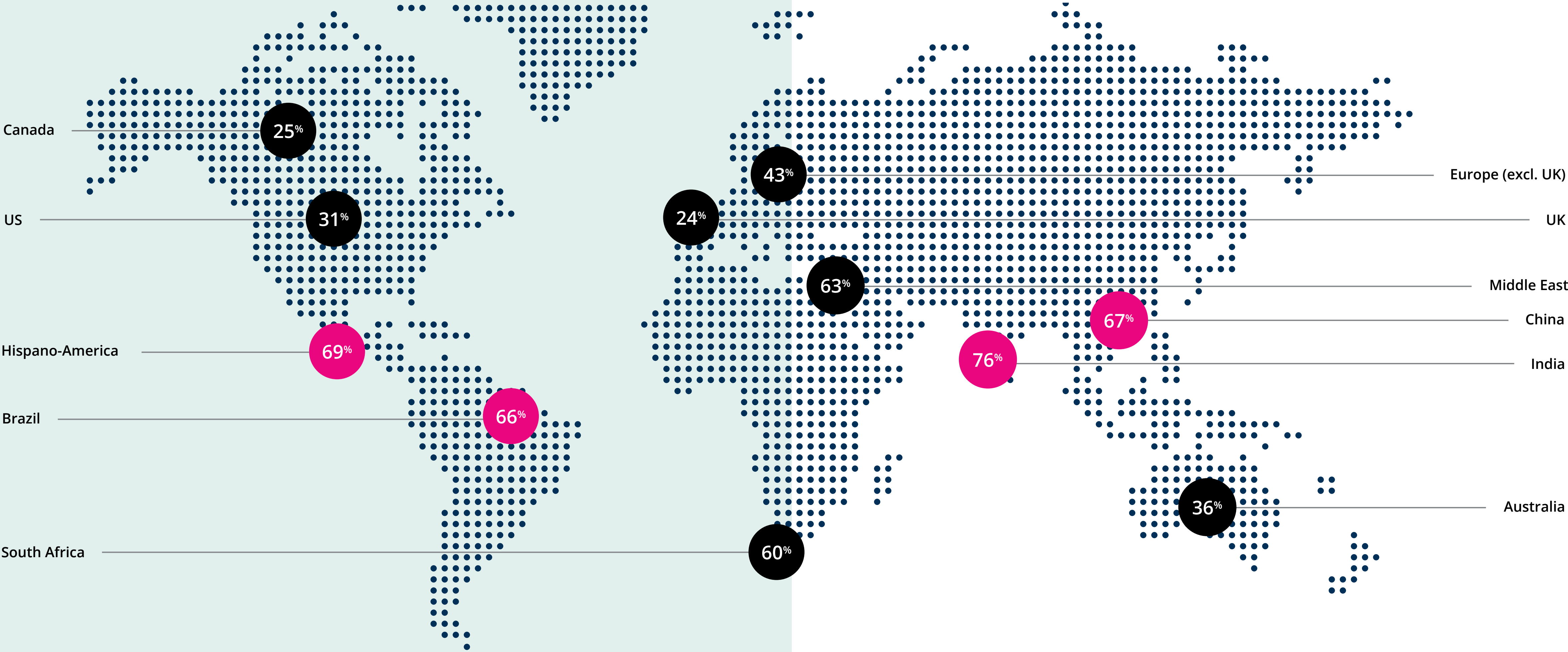
- Education is a key driver of the global economy today.
- There are other, more important factors than education driving the global economy today.



A global upskilling divide is emerging

People in **China, India, Brazil and Hispano-America** are more likely to upskill or retrain than workers in the US and UK.

In the last two years, have you found yourself in need of further education in order to do your job, because the job has changed since you started? (Among those employed) Yes (%)



Individuals — and employers — are leading the **reskilling/ upskilling** efforts

In North America and Europe, the use of short courses offered by employers is proportionally high. In other markets, a greater proportion of people rely on being self-taught or enrolling in certification programs.

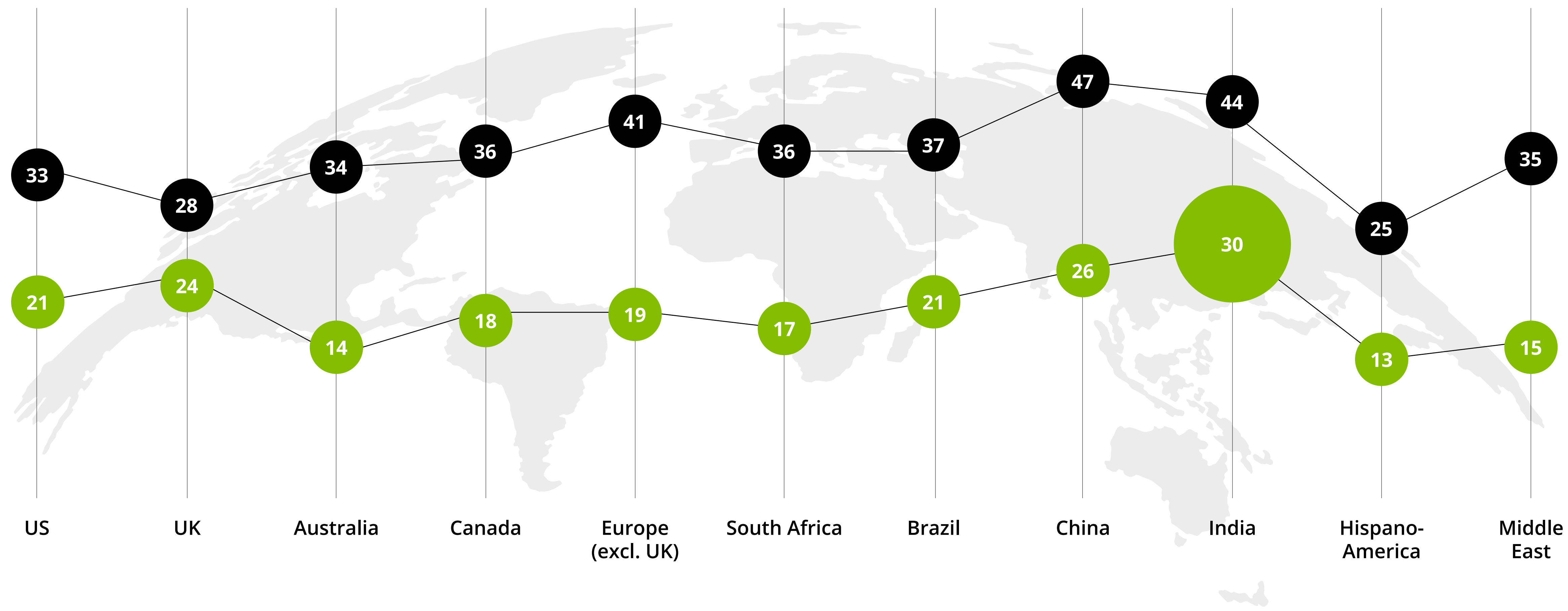
| What kind of training did you undertake? (Among those employed who said they needed further education) | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|--|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| I enrolled in a university-level degree program | 25 | 17 | 19 | 18 | 19 | 27 | 21 | 38 | 41 | 19 | 17 |
| I enrolled in a professional certification program | 28 | 25 | 28 | 19 | 24 | 26 | 26 | 56 | 36 | 25 | 30 |
| I found information or training on the internet and self-taught | 42 | 30 | 33 | 35 | 35 | 39 | 46 | 50 | 50 | 44 | 43 |
| I took a course or training offered by my employer, a professional association or a boot-camp | 41 | 51 | 46 | 33 | 39 | 37 | 45 | 57 | 48 | 37 | 45 |
| I didn't do anything to further my knowledge or skills | 12 | 5 | 7 | 6 | 7 | 8 | 2 | 5 | 2 | 4 | 6 |

Human skills are more important than ever, especially when it comes to tech and automation

Workers everywhere want to brush up on skills that machines and Artificial Intelligence (AI) can't yet compete with — critical thinking, problem-solving and creativity. Educational institutions aren't yet meeting this need.



Upskilling is the way to beat automation and technological disruption



Among those who said they needed to upskill in their jobs in the last two years, globally **20%** say they did it to combat automation; this is most pronounced in India where **30%** indicated this was the case.

What caused the need for further education? (%)

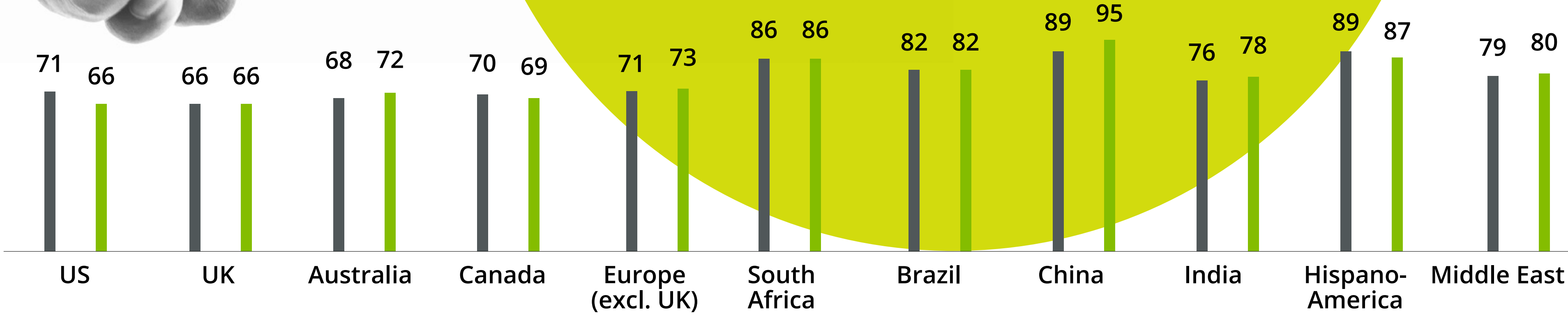
- I was required to use a new form of technology or a new software.
- Some part of my job was automated.

Workers want to build their soft skills in addition to their STEM skills

Globally, **78%** of people think they need to develop their soft skills, such as critical thinking, problem-solving and creativity.

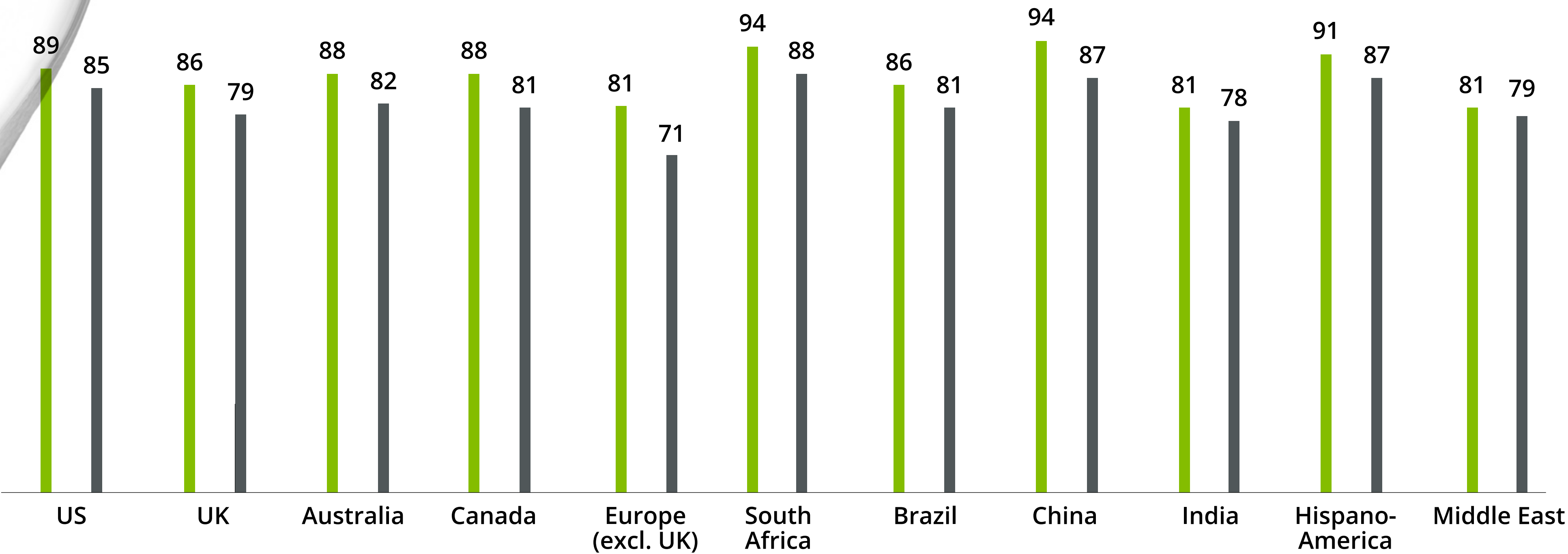
Thinking about your personal development and career path, to what extent do you agree... (%)

- I need to do more to develop my knowledge of STEM subjects/tech.
- I need to develop my soft skills, e.g. critical thinking, problem-solving and creativity.



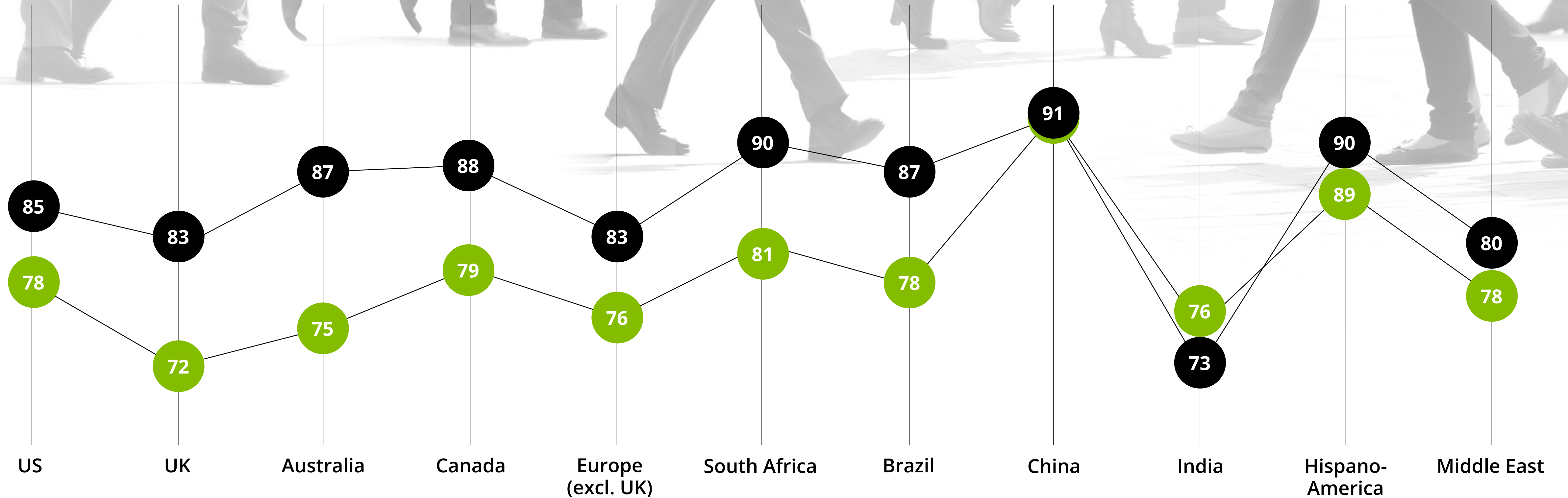
People think that human skills will become even more important in the future

Most respondents to our survey, wherever they live, agree that human skills are as important as technical skills.



Thinking about how jobs are changing, to what extent do you agree that: (%)

- Workers will need to improve uniquely human skills like creative thinking, reasoning & collaboration.
- Workers will need to keep up with STEM.

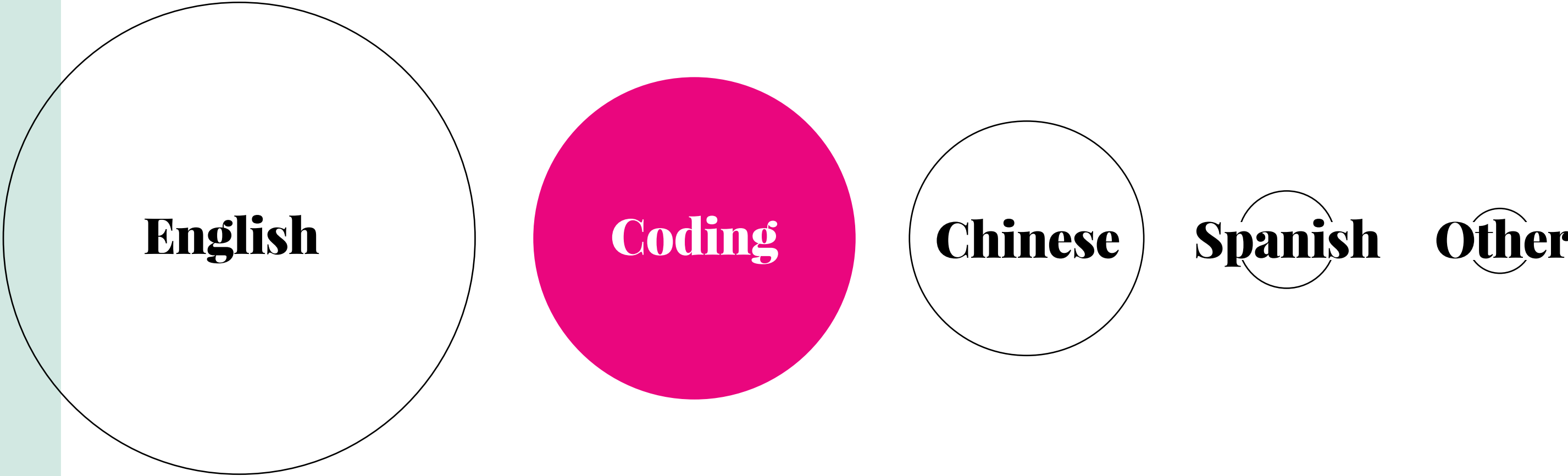
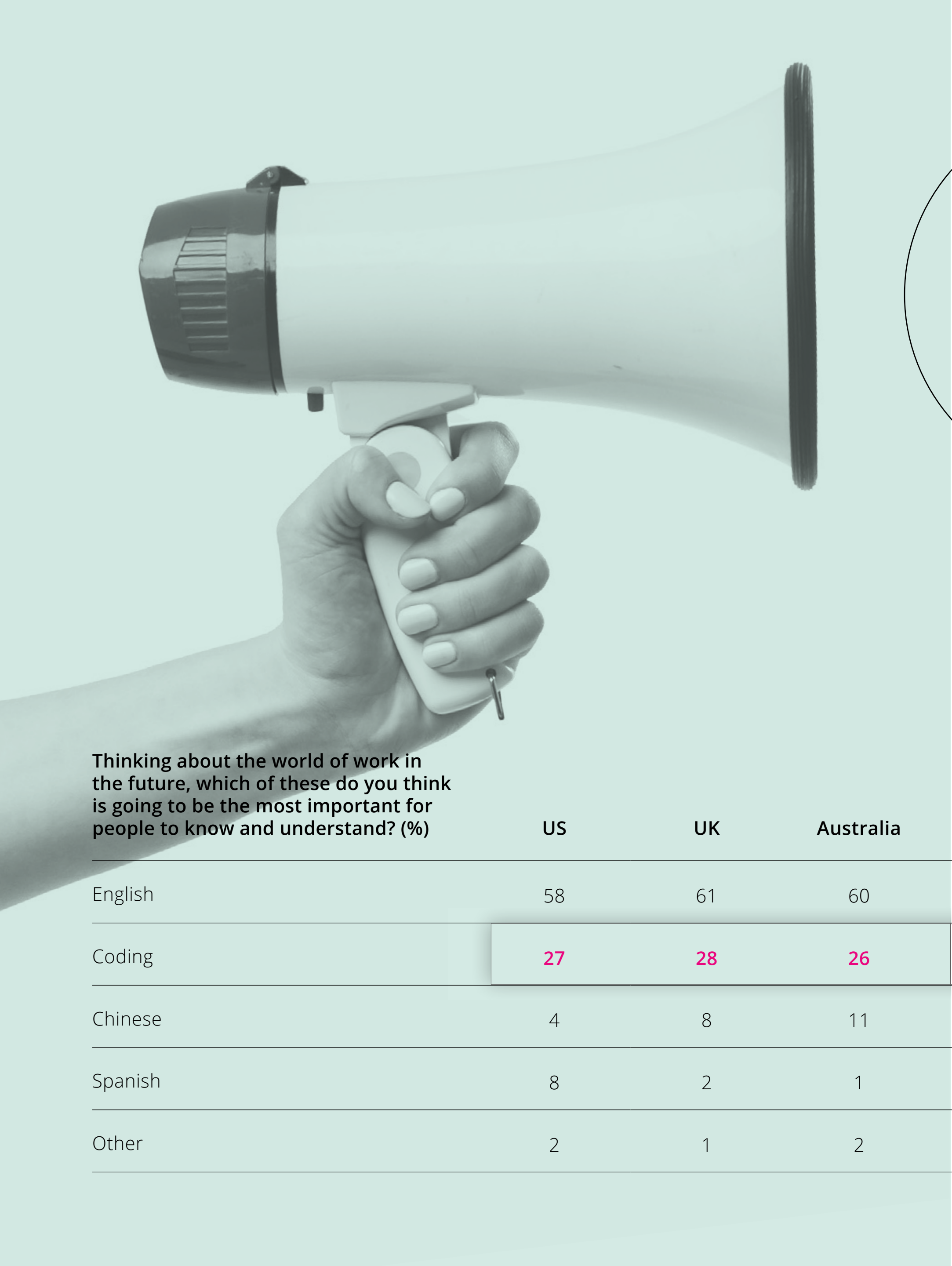


Universities and colleges can — and must — help workers do more to build human skills of the incoming workforce

Globally, universities have an opportunity to use their expertise to increase soft skill offerings.

Thinking about how colleges and universities are preparing students today, to what extent do you agree that: (%)

- Colleges/universities should do more to teach 'soft skills' like complex problem-solving, critical thinking, teamwork & collaboration to prepare for today's job market.
- Colleges/universities need to focus more on STEM subjects to prepare people for today's job market.



Coding is the new second language

People believe coding, along with a knowledge of English, will help them better compete in the new economy.

Thinking about the world of work in the future, which of these do you think is going to be the most important for people to know and understand? (%)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---------|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| English | 58 | 61 | 60 | 60 | 56 | 61 | 73 | 31 | 73 | 61 | 62 |
| Coding | 27 | 28 | 26 | 27 | 21 | 33 | 17 | 33 | 18 | 19 | 28 |
| Chinese | 4 | 8 | 11 | 7 | 14 | 5 | 5 | 36 | 3 | 10 | 7 |
| Spanish | 8 | 2 | 1 | 2 | 8 | 0 | 4 | 1 | 4 | 8 | 3 |
| Other | 2 | 1 | 2 | 3 | 2 | 1 | 1 | 0 | 2 | 2 | 1 |

Confidence in educational institutions is wavering

Most respondents to our survey think traditional educational institutions are failing to reach working adults with the skills they need for the future of their working lives. They also want to see governments doing more to make this kind of learning accessible to all.



There is a divide on the belief that the education system is failing the current generation

In the US, South Africa, Brazil and Hispano-America people feel that their domestic educational institutions are failing the generation coming into work now. Conversely, those responding to our survey from China, India and the Middle East feel their educational systems work well for that generation. However, there is evidence that these are the markets where people often seek formal education overseas or hire specialist private tutors for their children.

Which of the following statements best reflects your opinion on the full education system in your country, including primary, secondary and higher education? (%)

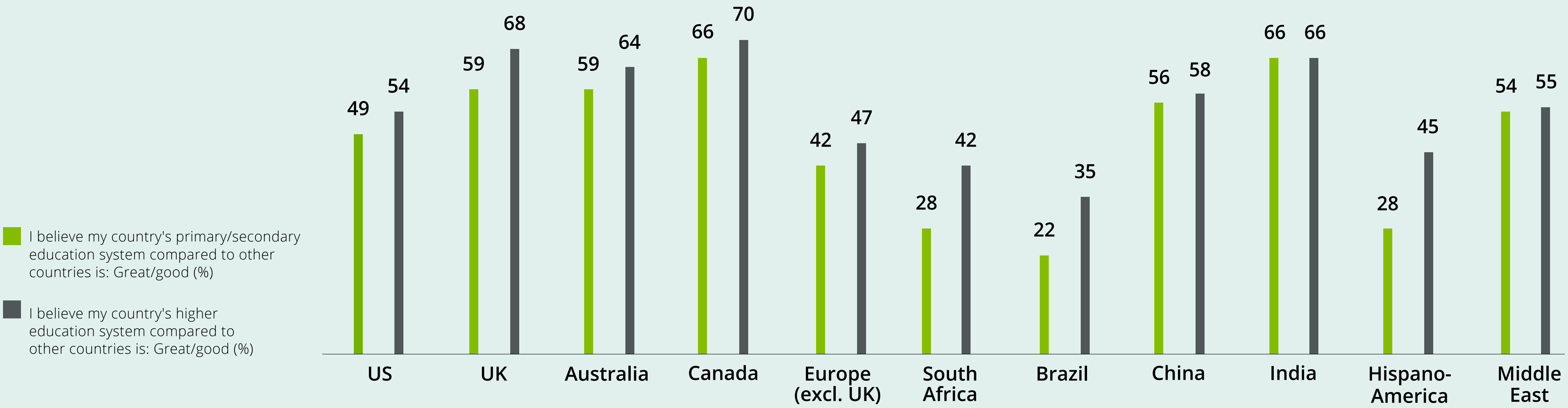
■ The education system in my country works well for the current generation.

■ The education system in my country is failing the current generation.



South Africa, Hispano-America and Brazil show a lack of confidence in their education systems

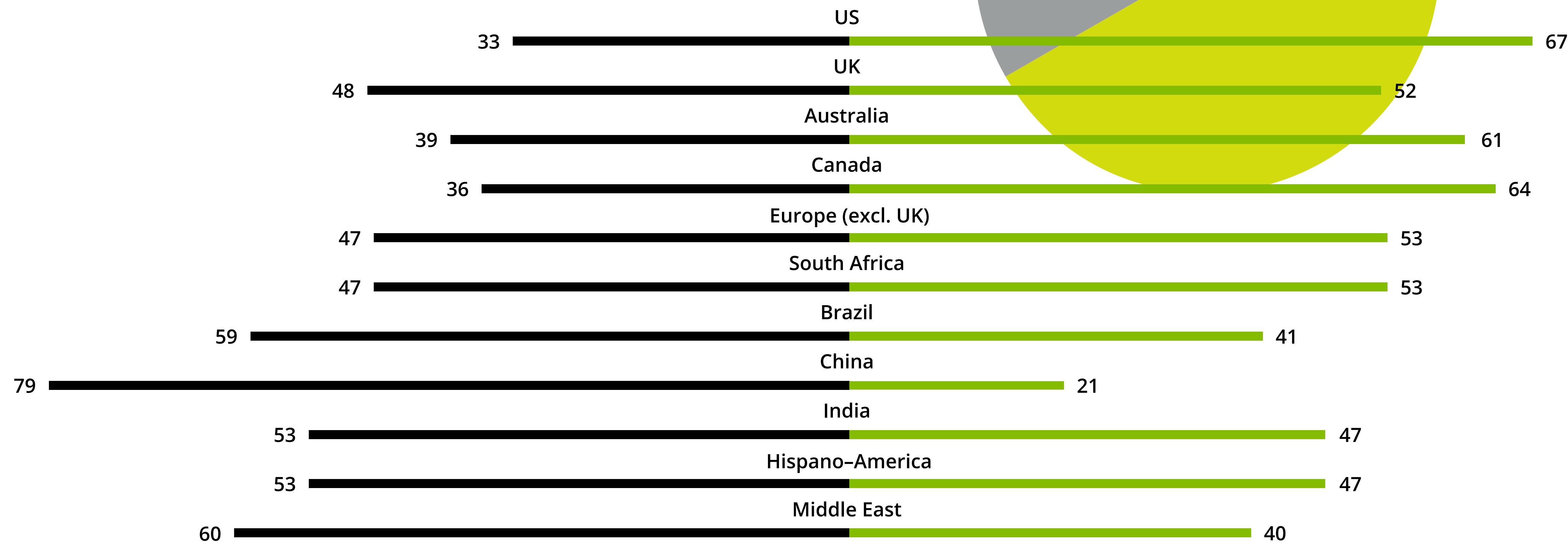
People in other countries are more likely to believe that their education systems are good compared to others.



Most see higher education as getting more out of reach for the average person

Which of the following statements best reflects your opinion about colleges and universities? (%)

- College/university is getting more attainable for the average person.
- College/university is getting more out of reach for the average person.



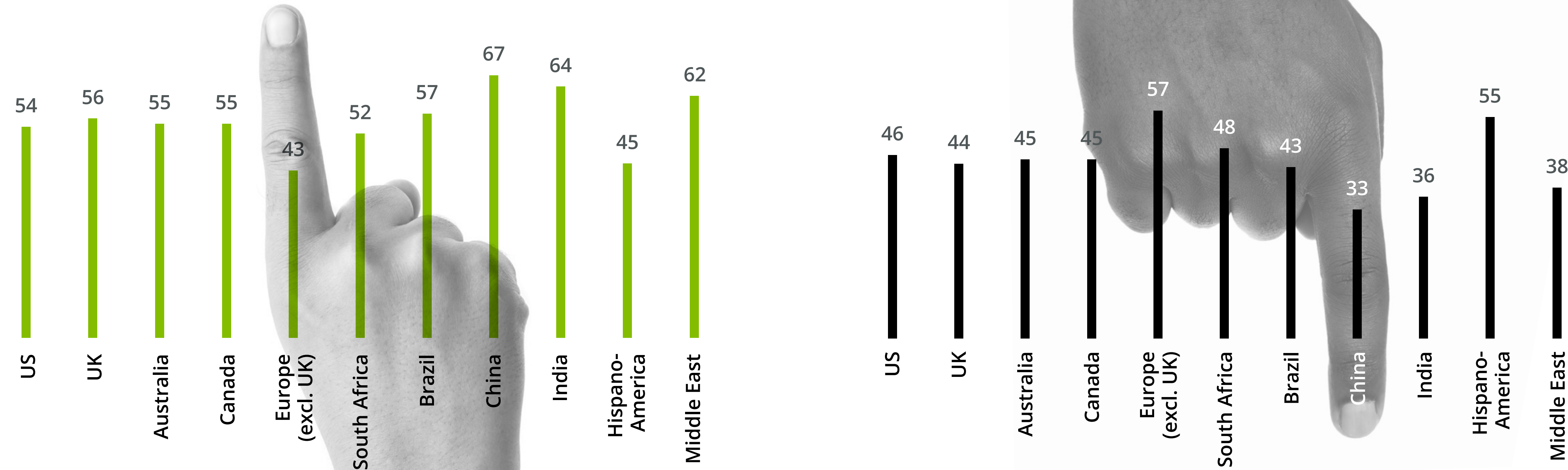
In the US 67% of people see higher education as getting more out of reach for the average person.

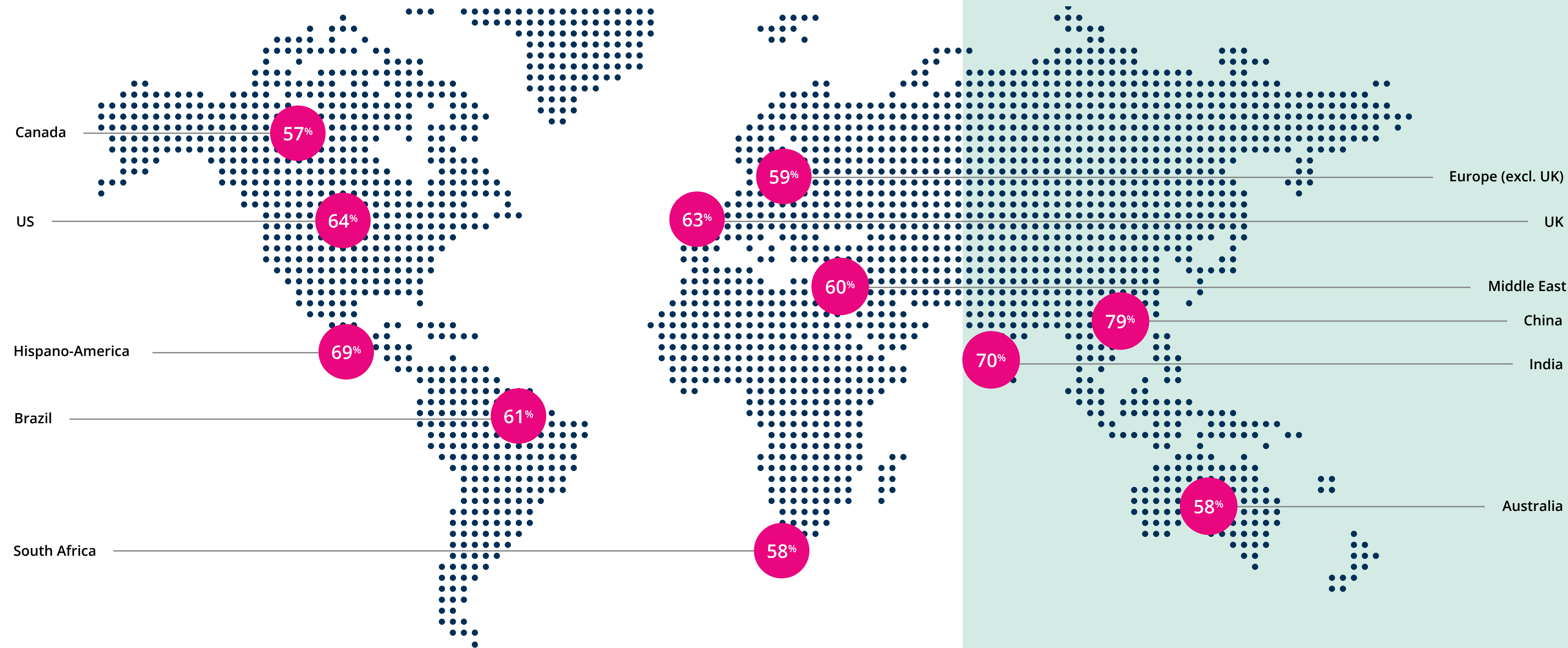
People are split on whether education systems are keeping up with workforce trends

Again, the exceptions are China, India and Middle East, where respondents believe that education systems are doing a good job in keeping up with workforce trends.

Which of the following statements best reflects your opinion on the education system globally, including primary, secondary and higher education? (%)

- Education systems are doing a good job keeping up with the latest trends in technology and a changing workforce.
- Education systems are NOT doing a good job keeping up with the latest trends in technology and a changing workforce.





Learners say universities need to do more to serve the job market

63% globally believe that colleges and universities aren't teaching the right skills.

Thinking about how colleges and universities are preparing students today, to what extent do you agree that: (%)

Colleges and universities aren't teaching the right skills for today's job market.

Universities are perceived as being too focused on themselves and traditional students

Globally, 70% of people agree that colleges and universities care more about their reputation than educating students.

In addition, 74% of respondents agree that colleges and universities focus too much on young students and should offer better options for working adults.

Thinking about the current state of higher education, to what extent do you agree...? (Showing % Agree)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|--|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Colleges and universities care more about their reputation than educating students | 72 | 72 | 72 | 68 | 71 | 70 | 72 | 60 | 71 | 73 | 68 |
| Public colleges and universities are just as good, in most cases, as elite institutions | 82 | 72 | 81 | 76 | 66 | 75 | 71 | 72 | 70 | 76 | 64 |
| Elite colleges and universities give people a real advantage in the job market over public colleges and universities | 67 | 72 | 66 | 64 | 67 | 76 | 66 | 85 | 69 | 75 | 68 |
| Colleges and universities are concerned about ensuring that disadvantaged students have equal access to education | 58 | 59 | 56 | 56 | 62 | 62 | 64 | 93 | 72 | 63 | 61 |
| I believe that disadvantaged students have a good shot at getting a college education | 57 | 60 | 57 | 49 | 51 | 61 | 62 | 75 | 69 | 65 | 58 |
| Colleges and universities focus too much on young students and should offer better options for working adults | 67 | 74 | 71 | 70 | 72 | 74 | 78 | 87 | 71 | 80 | 71 |

People look to government to level the playing field when they can't do it themselves

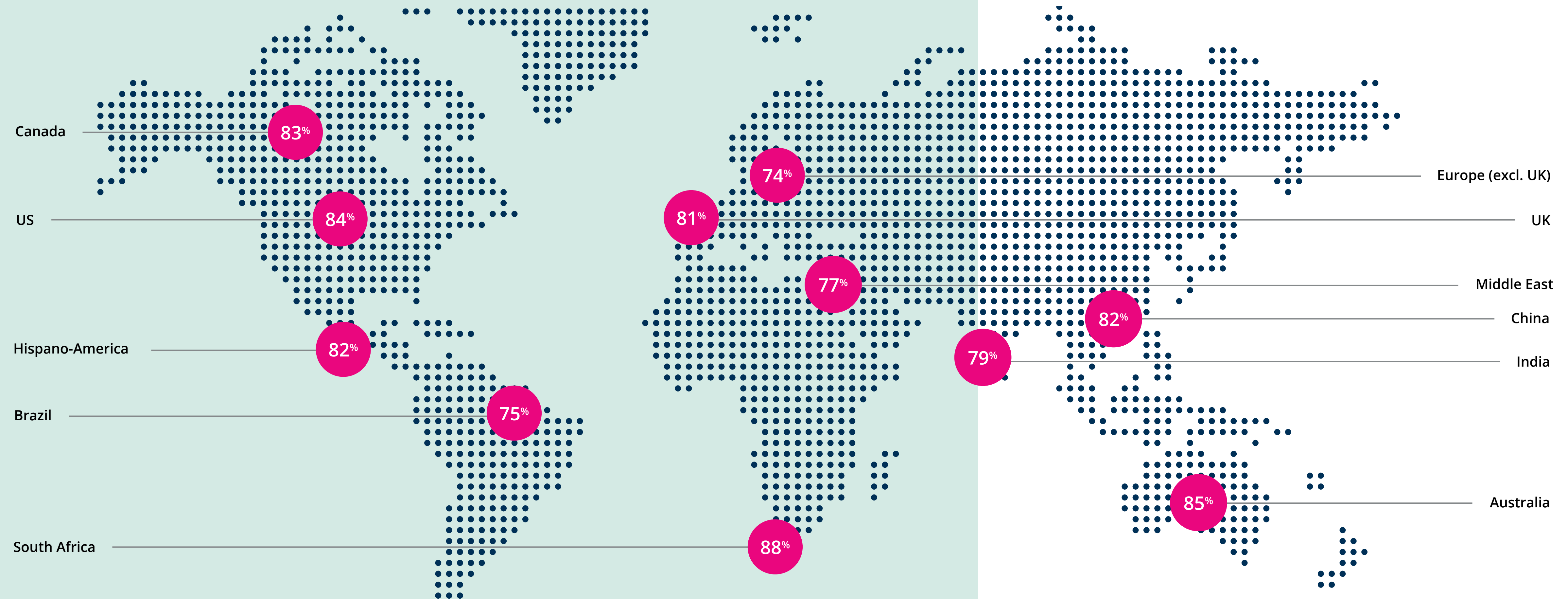
This holds true both in terms of making education more accessible — but also in terms of helping people upskill and connect to jobs.

| Regarding the role government plays in higher education, to what extent do you agree...? (Showing % Agree) | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|--|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Government should help to improve access to a college education | 80 | 86 | 90 | 90 | 85 | 92 | 87 | 95 | 80 | 94 | 80 |
| Government should play a role in offering training or credentials to help people learn new skills | 75 | 88 | 90 | 88 | 80 | 93 | 87 | 96 | 78 | 91 | 84 |
| Government should play a role in connecting people to jobs | 65 | 78 | 85 | 80 | 76 | 89 | 86 | 93 | 74 | 86 | 80 |
| Government should regulate or cap tuition fees | 81 | 87 | 90 | 89 | 84 | 90 | 82 | 95 | 76 | 66 | 81 |
| Government should provide some kind of free higher education for all | 71 | 83 | 86 | 80 | 81 | 86 | 87 | 88 | 75 | 92 | 81 |

Self-service learning not only exists, but will increase

With ready access to online learning, free online resources, short courses and certifications – versus declining trust in traditional education institutions – people believe that DIY learning is the future.





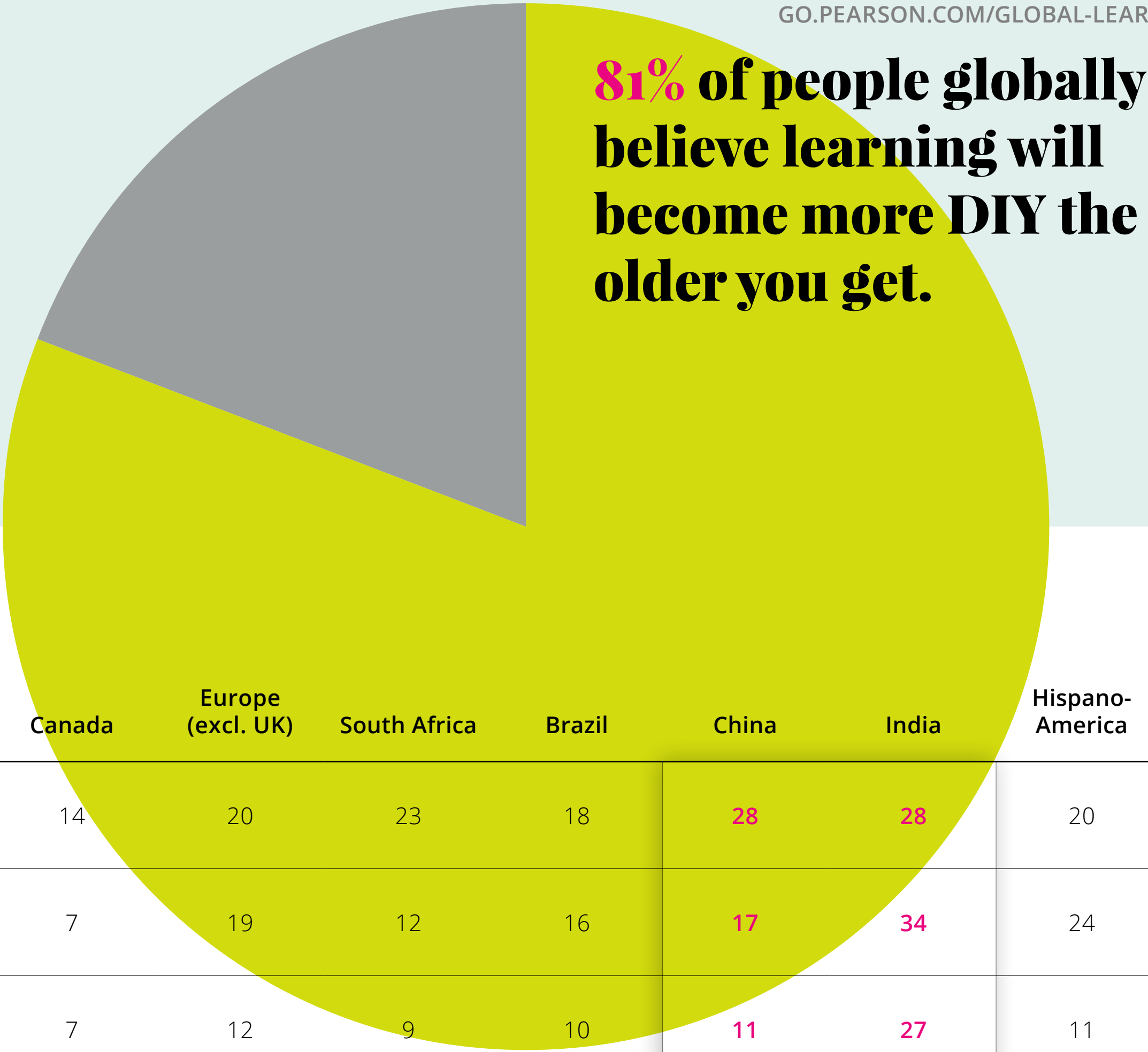
People believe learning will increasingly become more self-service

A DIY approach allows people from all walks of life, ages, jobs and levels of educational attainment to engage in life-long learning.

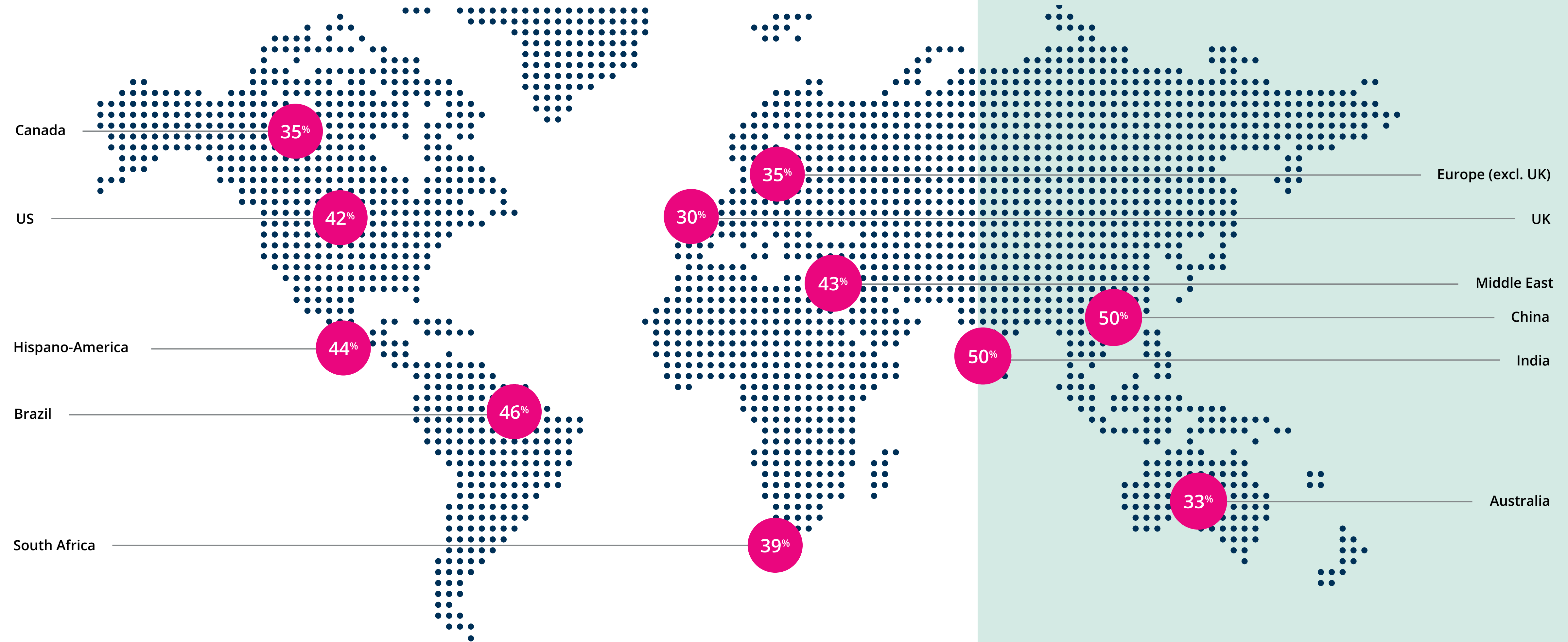
When you think about the future of schools and education, how likely is it that: (%)
Learning will become more self-service the older you get.

In many countries, “DIY-ing” your education starts at a young age

In countries like China and India, there is a more significant focus on hiring tutors or consultants to help students better compete in the college admissions process.



| Have you ever done any of the following to help a child or loved one prepare for college? (%) | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Hired a tutor to help improve grades | 16 | 9 | 14 | 14 | 20 | 23 | 18 | 28 | 28 | 20 | 25 |
| Hired a tutor specifically to prepare for an entrance exam | 13 | 9 | 8 | 7 | 19 | 12 | 16 | 17 | 34 | 24 | 18 |
| Hired a consultant to help with the college admission process | 10 | 7 | 6 | 7 | 12 | 9 | 10 | 11 | 27 | 11 | 16 |
| Purchased materials or hired a tutor to improve English skills | 13 | 14 | 10 | 8 | 25 | 25 | 24 | 36 | 40 | 25 | 29 |
| I've done none of these | 67 | 68 | 72 | 72 | 49 | 53 | 52 | 36 | 20 | 46 | 40 |



People have sought out self-learning to upskill

Among those who said they needed to upskill for their jobs in the last two years, **globally 43%** said they found information online and self-taught.

What kind of training did you undertake in the last two years?

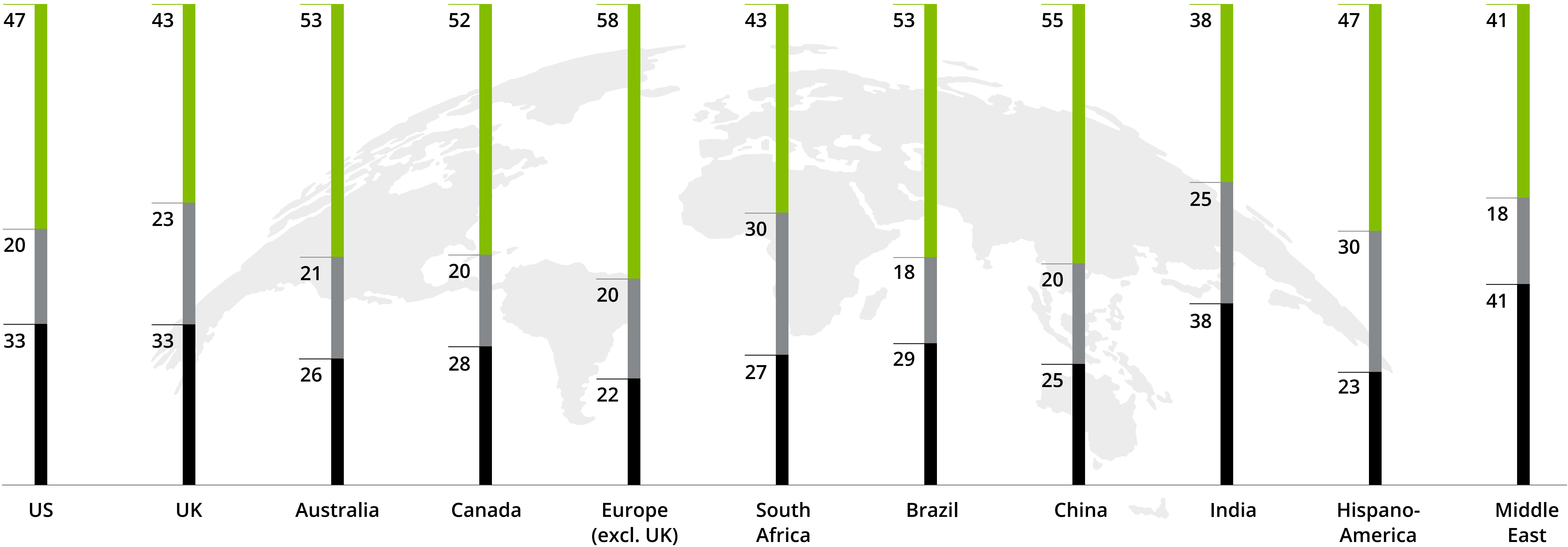
I found information or training on the internet and self-taught

People will continue to upskill — learning on their own terms

With ready access to online learning, short courses and certifications, people believe that DIY learning is the future.

If you had to learn something new for your career quickly, which method would you most likely pursue? (%)

- A short training program such as a boot-camp, certificate program, or something offered by a professional association.
- An accredited university or college program.
- A free resource such as YouTube, Lynda.com or Khan Academy.



People expect digital and virtual learning to be the new normal in the next decade

Technology can enhance the learning experience and increase accessibility; people of all ages are embracing it as the future of education.

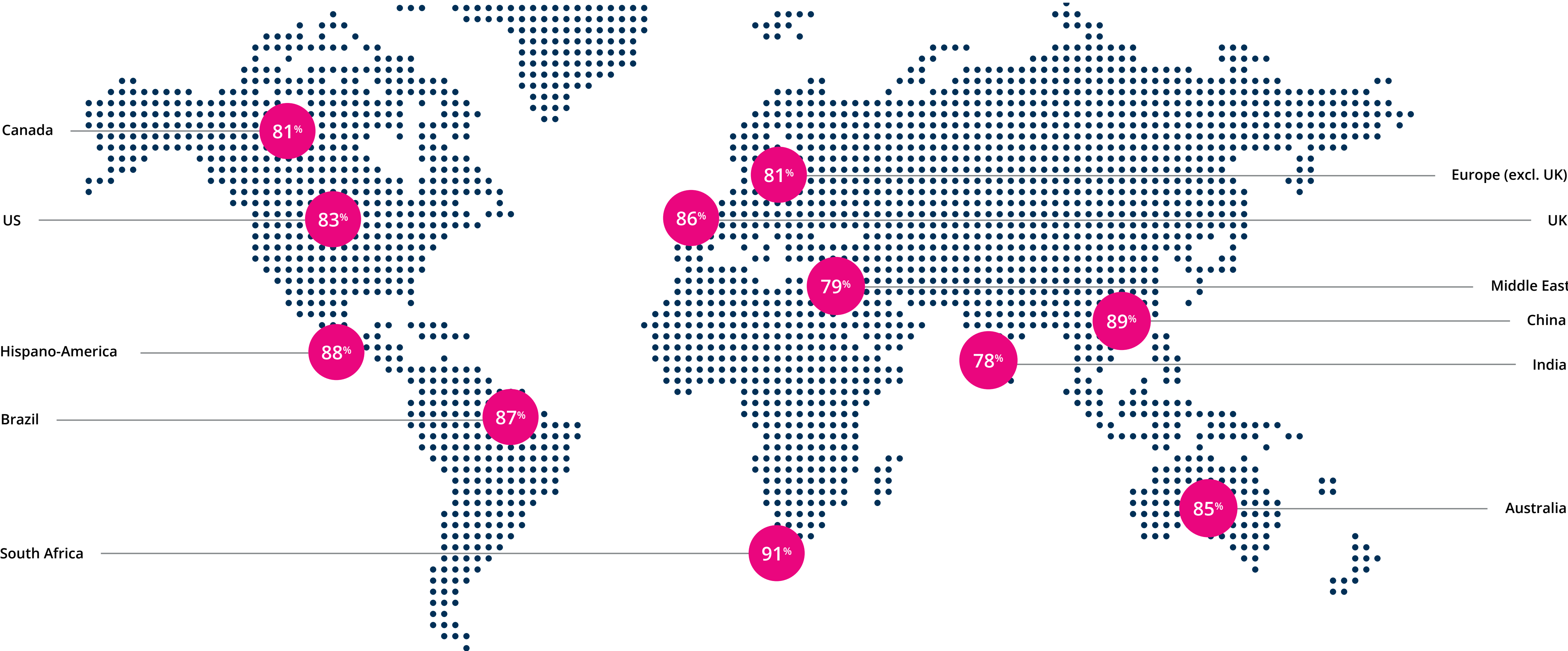


People see how technology can enhance education

Most respondents to our survey see the opportunity for Artificial Intelligence (AI) and other innovations to make learning more engaging.

Thinking specifically about primary and secondary education in your country, to what extent do you agree: (%)

Students today have the benefit of using technology to support their learning, which makes learning easier and more fun.



In: Smart Devices and Virtual Learning Out: Print Textbooks

Most interestingly, respondents in China are the least likely to prefer virtual learning or digital textbooks, yet they are very open to learning using smart devices.



When you think about the future of schools and education, how likely do you think each of the following are? (Showing % Likely)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Smart devices or apps (Amazon Echo, Google Home etc.) will be used to help learners at home or in the classroom. | 80 | 76 | 83 | 79 | 75 | 92 | 83 | 89 | 77 | 86 | 78 |
| More primary and secondary students will attend school virtually (online) versus attending a traditional school within ten years. | 74 | 56 | 67 | 64 | 57 | 71 | 73 | 59 | 76 | 77 | 66 |
| More college and university students will attend school virtually (online) vs. attending a traditional school within ten years. | 81 | 68 | 81 | 78 | 71 | 83 | 79 | 67 | 79 | 84 | 71 |
| Print textbooks will be obsolete by 2025. | 70 | 59 | 73 | 67 | 67 | 77 | 71 | 52 | 74 | 79 | 68 |
| Learning will become more self-service the older you get | 84 | 81 | 85 | 83 | 74 | 88 | 75 | 82 | 79 | 82 | 77 |
| YouTube will become a primary learning tool. | 59 | 54 | 62 | 57 | 53 | 77 | 76 | 68 | 77 | 77 | 70 |

Everyone sees the benefits of AI, though there are concerns surrounding data abuse and the role of the teacher

China and Hispano-America lead the world in the acceptance of AI in education and are among the biggest champions of its benefits.

| When you think about the use of AI in education, to what extent do you agree...? (Showing % Agree) | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano-America | Middle East |
|---|----|----|-----------|--------|-------------------|--------------|--------|-------|-------|-----------------|-------------|
| Negative: I worry that AI would displace classroom teachers | 66 | 63 | 73 | 68 | 69 | 76 | 71 | 61 | 73 | 75 | 67 |
| Negative: I'm concerned that AI would collect too much data on students | 70 | 71 | 74 | 71 | 69 | 74 | 72 | 75 | 72 | 74 | 68 |
| Positive: I believe that AI could really help people learn by making it more fun and engaging | 69 | 69 | 68 | 65 | 69 | 79 | 77 | 86 | 78 | 82 | 75 |
| Positive: I think AI could make a positive impact in the world of education | 68 | 70 | 67 | 68 | 65 | 80 | 77 | 90 | 78 | 83 | 74 |
| Positive: I think the algorithms used in AI could help provide highly personalized educational content | 66 | 67 | 67 | 67 | 70 | 81 | 79 | 90 | 78 | 86 | 75 |

School safety, online bullying and social media are real concerns, especially in the US

While school violence is a main driver of safety perceptions, social media and online behaviors like bullying are having an effect too, making the school environment more difficult for today's students.





Worries about social media and bullying compound school safety concerns

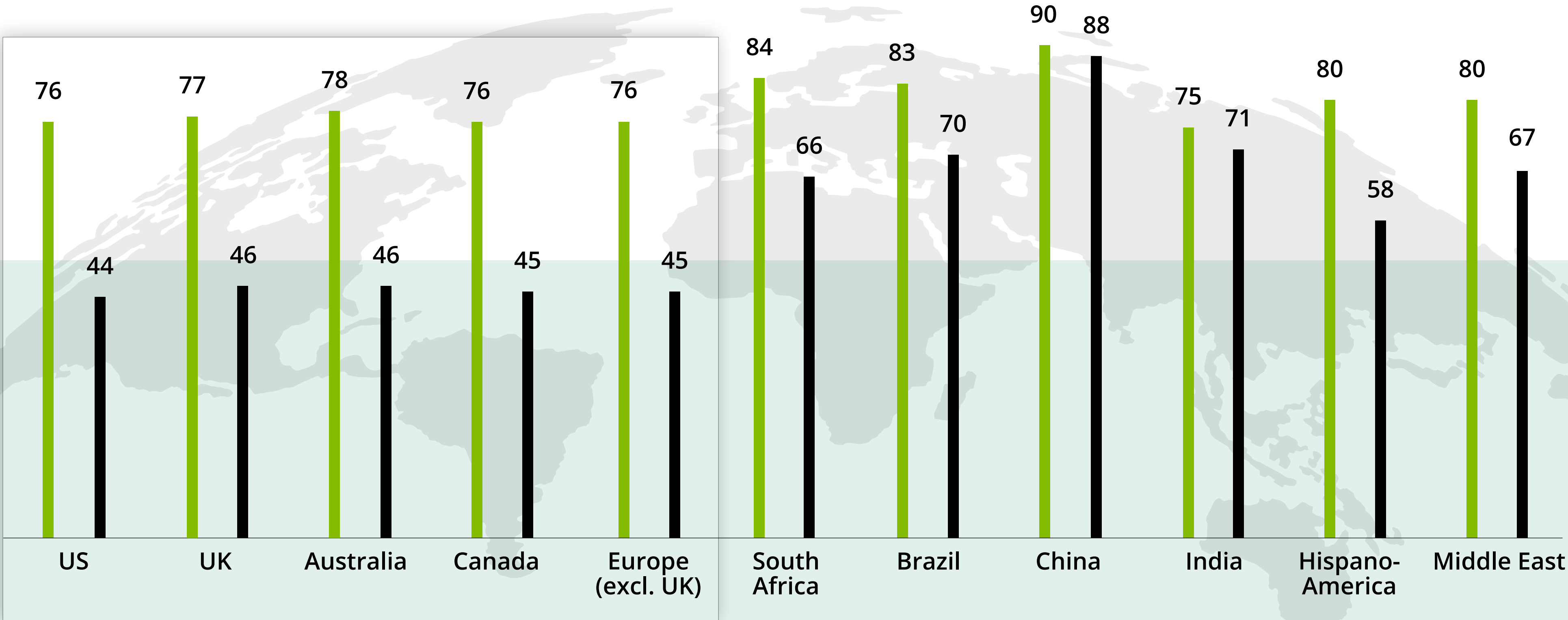
Concerns surrounding school safety are undoubtedly driven by ongoing school violence issues. But people do say school is more difficult than it was 25 years ago, in part, because of online bullying and social media

Thinking specifically about primary and secondary education in your country, to what extent do you agree...?
(Showing % Agree)

| | US | UK | Australia | Canada | Europe (excl. UK) | South Africa | Brazil | China | India | Hispano- America | Middle East |
|--|----|----|-----------|--------|----------------------|--------------|--------|-------|-------|---------------------|-------------|
| Schools are less safe today than they were 25 years ago | 84 | 71 | 68 | 72 | 69 | 82 | 80 | 48 | 59 | 81 | 62 |
| Bullying (in person and online) has made school more difficult for students | 84 | 84 | 88 | 85 | 85 | 88 | 75 | 64 | 66 | 81 | 68 |
| Social media has made the school environment more difficult for students today | 76 | 77 | 79 | 74 | 68 | 68 | 56 | 45 | 63 | 72 | 56 |

One more digital divide: how countries view social media’s impact on learning

In the US, UK, Australia, Canada and Europe there is less acceptance that social media will help learning, even though they believe in its ability to build global connectivity.



Thinking about the role that education has played in your life or that of other people, how strongly do you agree that:

- Social media is helping students connect with other students around the world.
- Social media is helping to improve the learning experience.

Contacts

Asha Choksi

VP Global Research and Insights

Colette Rosenhaus

Manager Global Research and Insights

Pearson

80 Strand
London
WC2R 0RL

[GO.PEARSON.COM/GLOBAL-LEARNER-SURVEY](https://go.pearson.com/global-learner-survey)

GLS@pearson.com

