



The future of lifelong and executive education

MAY 2024



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Introduction

COVID saw a rapid transition to online learning. For those already working, often forced to work from home, the pandemic provided an opportunity to rethink their careers, and get the learning and development they needed. For employers, online learning delivered flexible access to leading learning brands and at a fraction of the cost of sending staff to distant campuses.

Working with LinkedIn, CarringtonCrisp revealed the changing nature of the lifelong and executive education marketplace in a report published in July 2021. That study has now been repeated in order to better understand how the market is evolving, such as developing more sophisticated online learning, beginning to introduce AI to staff development and assessing the impact of geopolitical and economic challenges. Looking at recent LinkedIn data gives a clue as to how the learning and development market is evolving:

- **The skills that employees need for a given position have shifted by around 25% since 2015; by 2027, this number is expected to double.**
- **In the last year, more than 45% of hirers on LinkedIn explicitly used skills data to fill their roles, up 12% year over year. Roughly one in five job postings (19%) in the US no longer requires degrees, up from 15% in 2021.**
- **Conversations around AI on LinkedIn increased globally by 70% between December 2022 and September 2023.**

In the new study, two surveys were undertaken, the first with 1,100 employers from 32 countries and the second with 9,927 individuals aged 25–55 from more than 40 countries, with the largest groups being from the USA, the UK, India, Canada, China, Germany and France. Data was collected in October/November 2023.

In both surveys, the largest groups work in finance and insurance, information and communication, and manufacturing. Among the employers, 29% are Members of the Executive Committee/in C-level roles/Board Directors, while 25% are Senior functional heads. Just over eight out of ten (81%) can decide which programs staff in their organisation attend and which providers they use.

Among the individual learners, 59% are male, 41% are female, 40% are aged 24–35, 36% from 36–45 and 23% from 46–55. Just under four in ten (39%) have an undergraduate degree as their highest educational qualification, 26% have a Master's degree, 8% an MBA and 12% have no degree.



Executive Summary

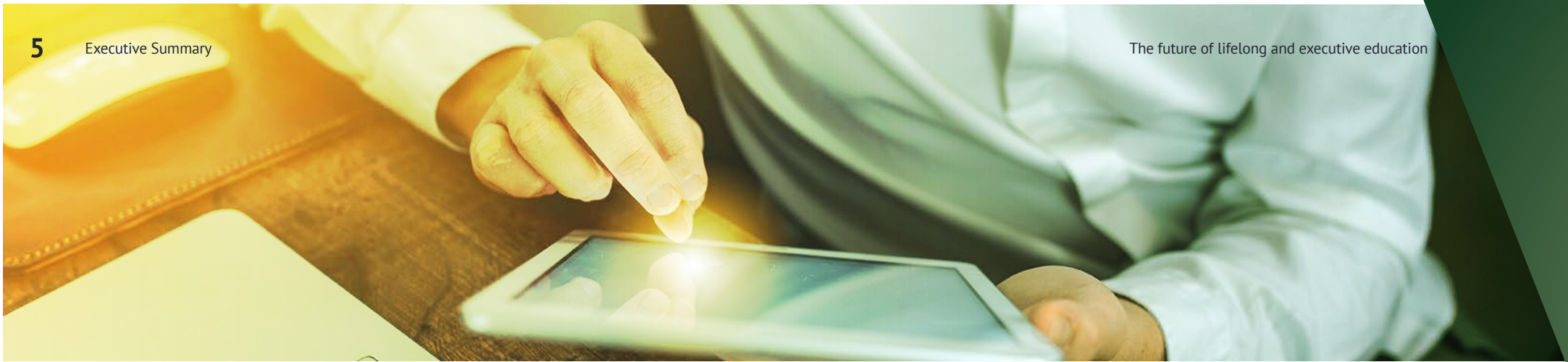
The world of work is changing and with it the learning and development that supports individuals and businesses. Across the world, new business models have put an emphasis on value, speed and technology. Learning and development can't ignore these trends.

The future of lifelong learning and executive education will be branded, international, flexible and often delivered differently from before. Findings from learners and businesses suggest that learning is more likely to be a journey than a destination.

Rather than completing a degree in a linear fashion over a number of months, if not years, individuals and employers are seeking shorter slices of learning that can be undertaken flexibly and will quickly deliver an impact in the workplace. The learning journey might involve a series of different qualifications with different providers across different platforms.

**THE FUTURE OF
LIFELONG LEARNING
AND EXECUTIVE
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BEFORE**

With such diversity of learning, it's sometimes difficult to assess the quality of learning that has been undertaken, especially when the only qualification provided is a certificate of completion. Instead of traditional qualifications, it may be provider brands that indicate quality to an employer. A brand known for the quality of its learning experience, the impact it has on individuals and businesses, the value of its provision and its customer service is likely to be successful in the learning and development marketplace.



New approaches to learning and development may take many different forms. Online learning is well established, and technology is likely to play an even greater role going forward, especially artificial intelligence.

AI can provide content, it can provide curation and it can drive careers. New course content can be developed quickly, drawing on research, case studies, business practice, news and customer requirements. AI can help individuals seeking advice and support to grow their careers, curating the best learning and development wherever it may be found.

However, there's more to innovation in learning and development than AI. Collaboration, communities of learners and platforms of providers all point to new approaches for learners and employers. Adding value to formal learning with personalised, instant and, sometimes, free support will extend the value of learning.

Universities and business schools will need to think about how they innovate and build on their learning heritage.

Higher education has assets that it can use to build the future of lifelong and executive education – research, content, alumni, pedagogy, experience, history and accreditation – but will need to think about how to use these assets creatively.

Collaborating across universities, rather than just delivering from a business school, will help to provide better value to employers. Building relationships that lead employers to a greater depth of understanding will create new opportunities for learning and development programs. Creating an awareness of what universities and business schools can offer, and where, will attract a diversity of employers who need learning and development.

Universities and business schools have much to offer the learning and development marketplace, but that offer needs to evolve beyond traditional practice. Recognising how demand is changing, how delivery is shifting and what learners want and when, will be key to building sustainable and successful lifelong and executive education.

**COLLABORATION,
COMMUNITIES OF
LEARNERS AND
PLATFORMS OF
PROVIDERS, ALL
POINT TO NEW
APPROACHES FOR
LEARNERS AND
EMPLOYERS**

What employers want – it's about much more than degrees

Employers are looking for different types of qualifications, some of which may not even be considered qualifications in the traditional sense. While around three in ten have used degrees in the last two years (31% Executive MBA, 31% Specialised and Executive Master's and 30% MBAs), that's far behind industry certifications (51%), short course non-degree programs often described as executive education (44%), custom designed programs (39%) and online courses from a business school (38%).

Only one in five employers (21%) have used microcredentials, which may seem low given how often this term is used today. However, part of the problem is how to clearly define a microcredential, when many of the different 'qualifications' sought by employers might be called microcredentials. And many of those 'qualifications' will only come with a certificate of completion, lacking any academic credentials, but more often backed by a leading learning brand.

It's clear that employers want flexible and personal solutions for their staff, learning that meets a particular need at a particular time, and impact from learning that goes beyond a qualification. Coaching and mentoring are widely used by employers to support staff development.



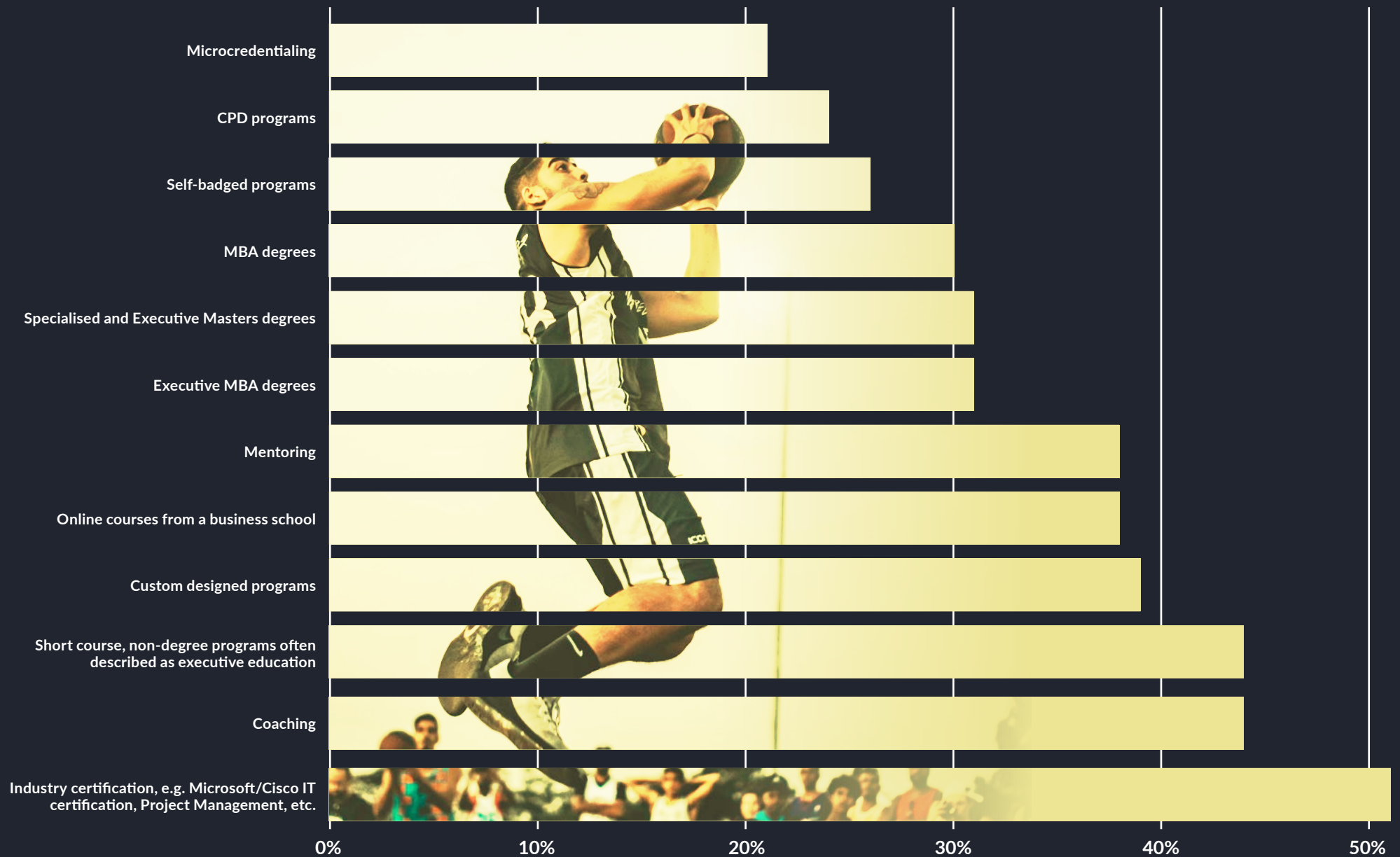
71%

OF EMPLOYERS SEE INDIVIDUAL COACHING AS ESPECIALLY VALUABLE TO GROW THE IMPACT OF LEARNING

44%

HAVE USED COACHING AND 38% MENTORING TO SUPPORT THEIR STAFF IN THE LAST TWO YEARS

QUALIFICATIONS AND SERVICES USED BY EMPLOYERS IN THE LAST TWO YEARS

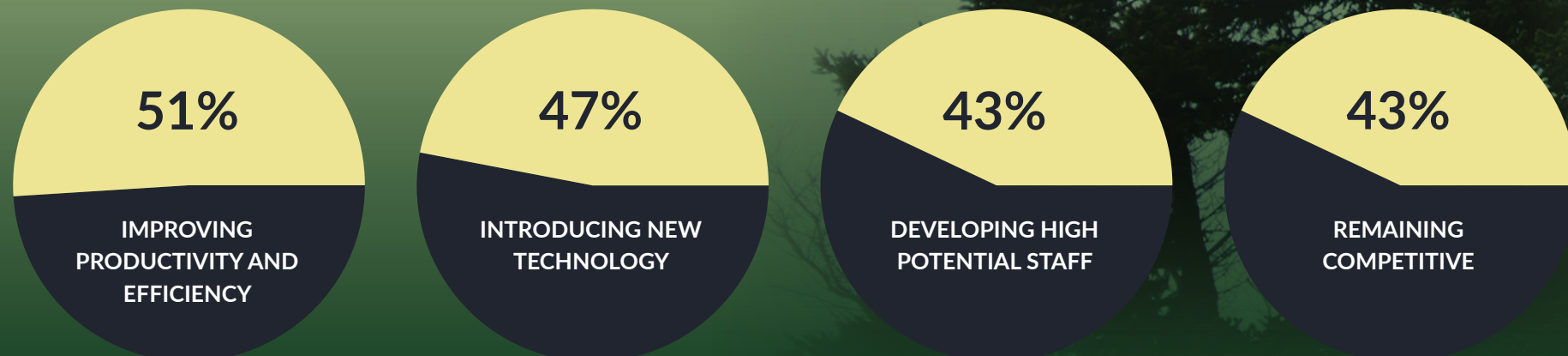


Budgets grow to meet new demands

As businesses have recovered from the pandemic, there has been a small majority of employers who suggest their budgets for learning and development have increased, compared with those where they stayed the same. However, in the next two years, 67% of employers expect budgets to increase, while only 25% expect them to remain the same.

An accelerated demand for learning is being driven by uncertainty and rapid change across economies. Faced with intensifying competition from new entrants, new ways of doing things due to changes in technology, increasing costs driving the need for improved productivity and labour shortages, employers are seeking new approaches to reskill, upskill and newskill their staff. Add in economic uncertainty, geopolitical challenges and the need to deliver more sustainably, and it's no surprise that employers need to find ways to do things differently, which means training staff to do things differently.

DRIVERS OF LEARNING AND DEVELOPMENT AMONG EMPLOYERS ARE LED BY:



Reskilled, upskilled, newskilled


– Demand is everywhere

Employers find that there are shortages across a wide range of skills. Inevitably, technology is a focus, with artificial intelligence and blockchain most likely to be identified as key skills that are not widely available.

However, there are a range of non-technology subjects that employers also regard as important but difficult to find: change management, crisis management, managing across cultures, agility, business model innovation, decision-making in uncertain and complex times, design thinking and negotiation are highlighted as key skills that are not widely available.

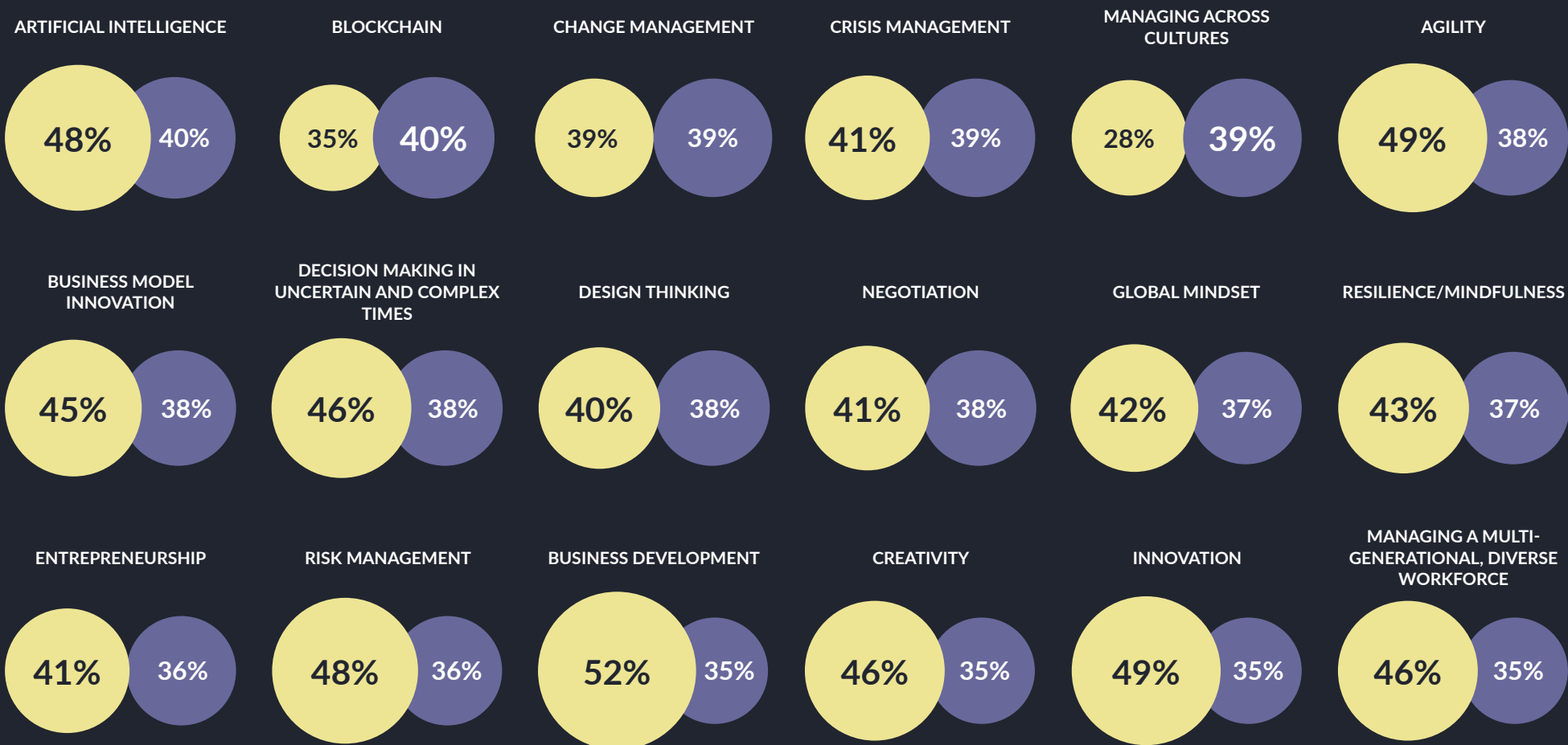
Given the uncertainty faced by many employers, it's not surprising to see change management, agility, business model innovation and decision-making in uncertain and complex times listed. Having employees that can adapt their experience to different situations and manage business transformation will be the key to delivering sustained success for many organisations.

Leadership remains a key skill, but it is one of ten that more than half the employers consider to be widely available, along with a host of technology subjects, strategy and sustainability. It's not that there won't be demand for learning and development in these fields, but at present other subjects are more important for employers and are currently harder to find.

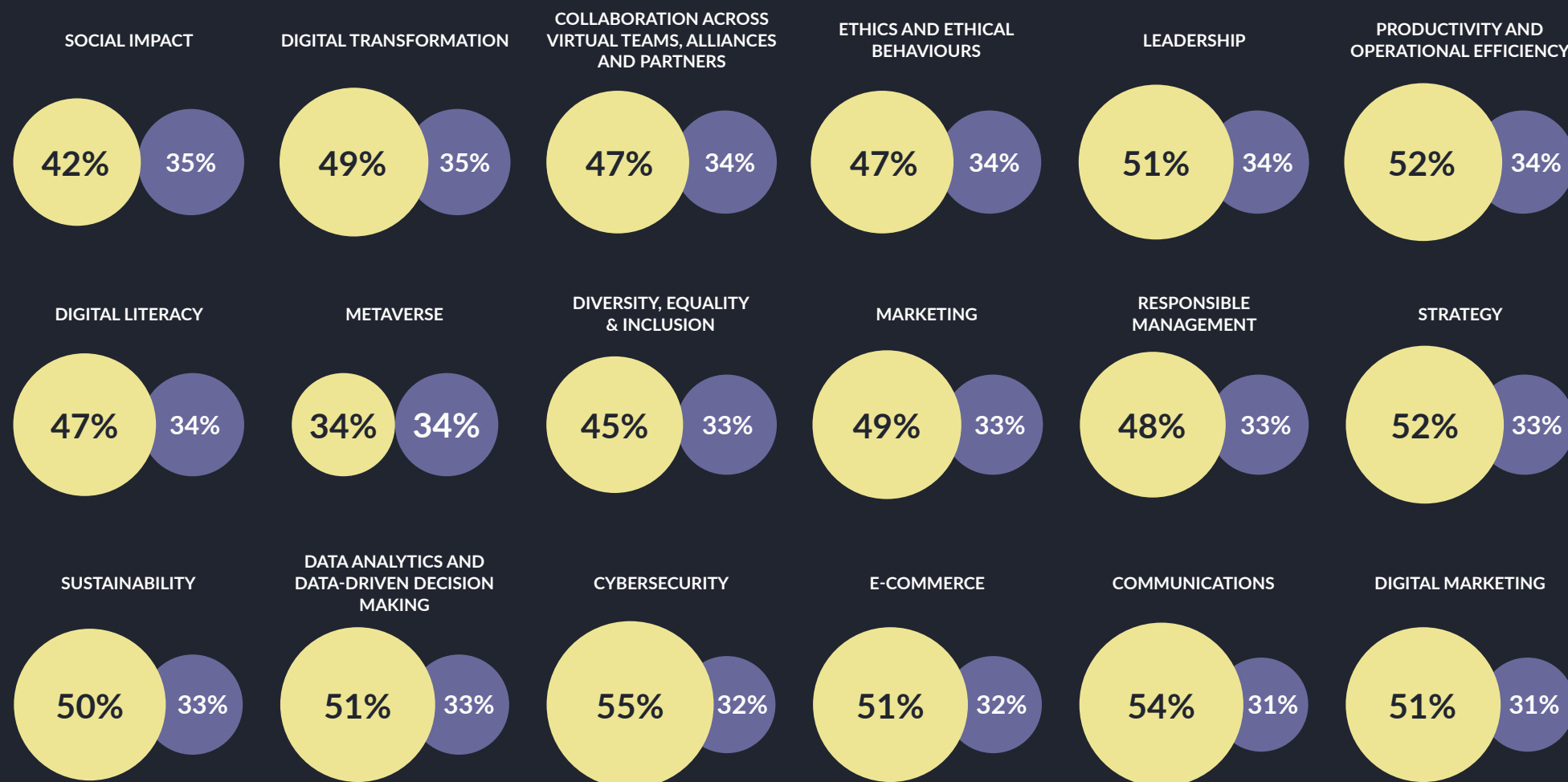


**EMPLOYERS FIND
THAT THERE
ARE SHORTAGES
ACROSS A WIDE
RANGE OF SKILLS**

KEY SKILLS FOR EMPLOYERS – WIDELY OR NOT WIDELY AVAILABLE



KEY SKILLS FOR EMPLOYERS – WIDELY OR NOT WIDELY AVAILABLE



The future of work drives the future of learning

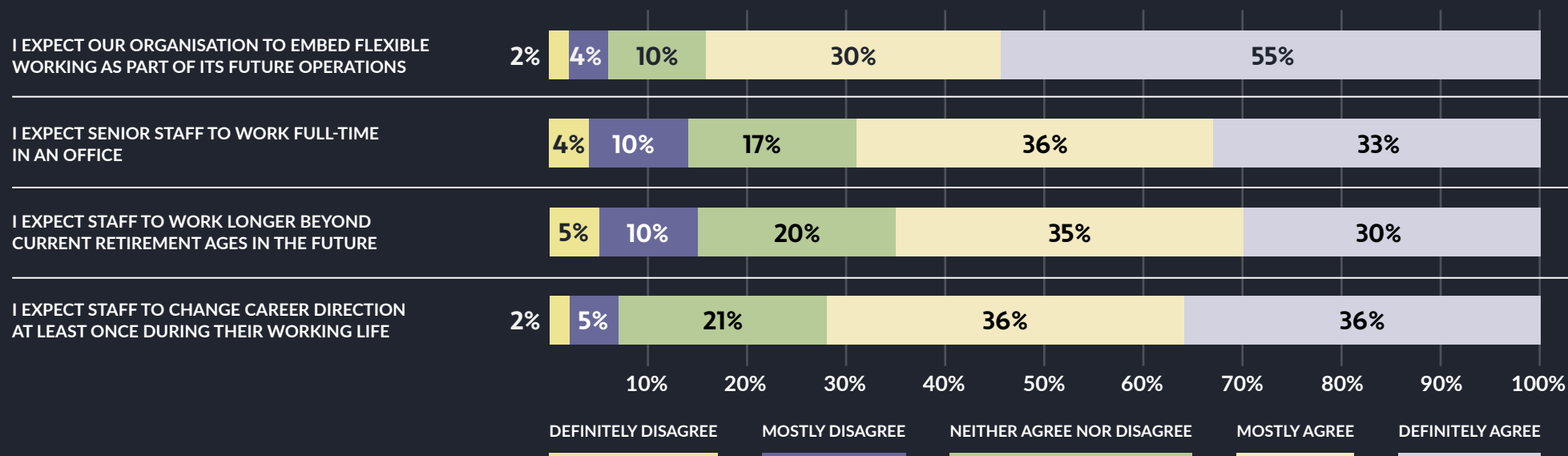
The future of learning and development is, in large part, determined by the future of work. While much was changing before COVID, with increasing longevity and the growth of the gig economy, the pandemic changed much more, not least a desire among many employees to embrace home working.

That drive to flexible working now seems to be part of the new normal; 85% of employers agree that they expect their organisation to embed flexible working as part of its future operations. For some employers it will be about a new way of working, while for others it will be a necessity, required to ensure that sufficient staff with the right skills are available to grow a business. There may

be plenty of angst among some bosses who want staff back in the office, but that energy would be better spent developing flexible solutions that work for everyone.

Almost three-quarters of employers (72%) expect staff to change career direction at least once in their lifetime. As staff work in different modes, as they work longer and as they change direction, so they will need to learn more. Working with boomerang employees, who may leave, come back and leave again for work and/or study, will benefit employers. New ways of working will increasingly drive new ways of learning.

THE FUTURE OF WORK – EMPLOYER PERSPECTIVES

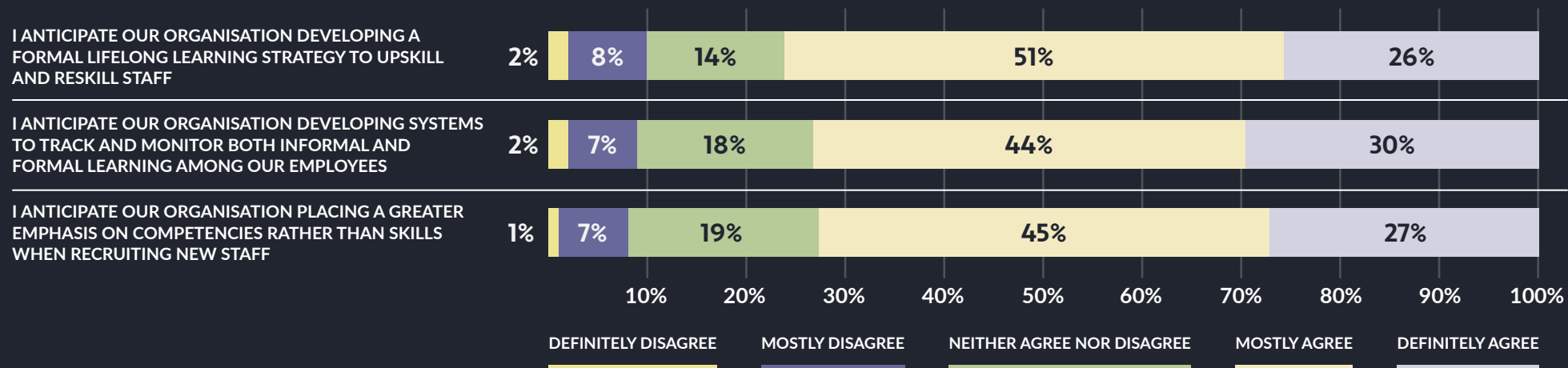


The new pattern of learning is already emerging. Employers are developing systems and tools to drive greater impact from learning and development in their organisations. Recognising the greater diversity of learning over a longer time period, 77% of employers anticipate developing a formal lifelong learning strategy to upskill and reskill staff.

Part of a lifelong learning strategy means knowing what you already have, not just what you might need for the future. Consequently, 74% of employers anticipate developing systems to track and monitor both informal and formal learning among their employees to make the most of their current skills and future development. Agility that allows an employer to get the best fit for teams across their organisation will enhance productivity.



EMPLOYER APPROACHES TO STRATEGIES, SYSTEMS AND SKILLS



A fast and flexible future, free and on-demand

When it comes to delivery in a future lifelong learning strategy, employers are focused on flexibility, relationships and understanding; using flexibility of delivery and relationships with providers to build an understanding of their business.

- 80% of employers expect that online learning will become the standard approach to developing people in their organisation
- 81% believe that customised programs tailored to their organisation are key to meeting development needs
- 83% think that programs with a mix of custom and open learning provide a valuable option to maximise impact for individual staff.

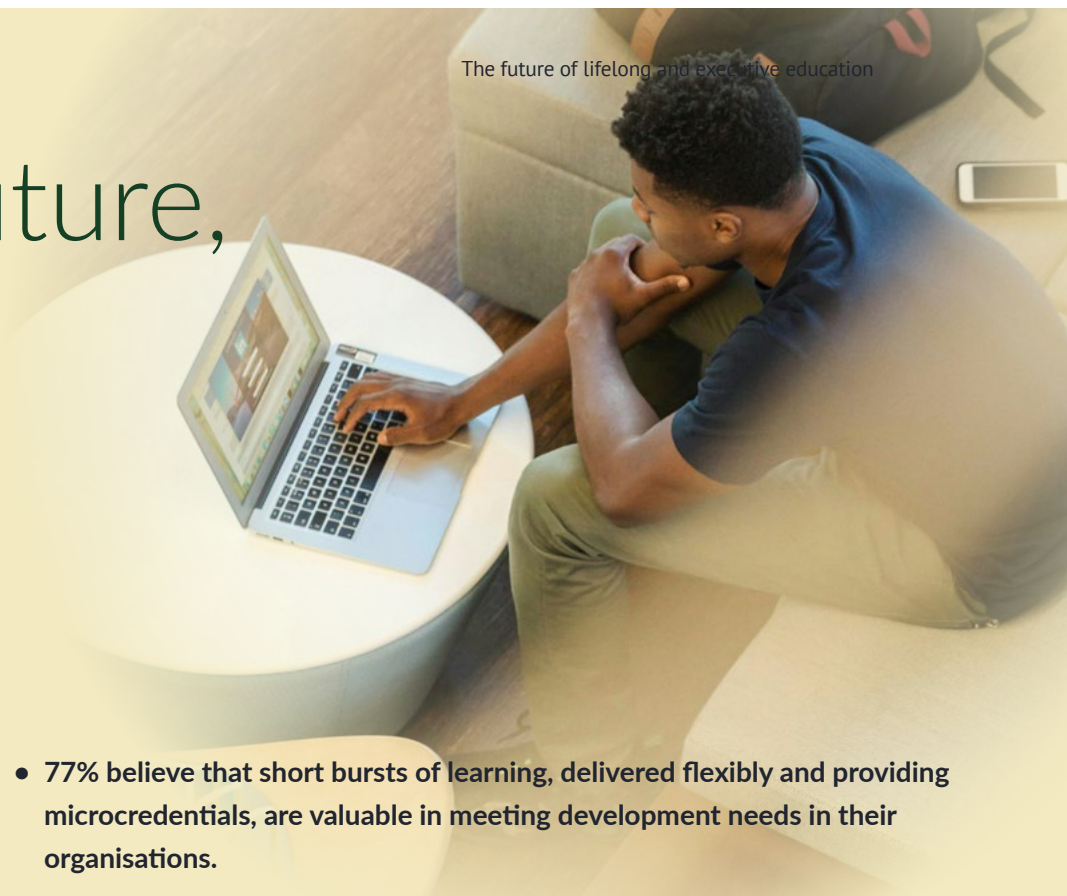
The nature of the learning is likely to be focused on shorter rather than longer periods of learning, although some of these may stack up to produce what is recognised as a degree today. Rather than learning in a linear fashion, short bursts of learning within regular working patterns are preferred, generating a rapid impact rather than having to wait for degree completion at some point in the future. Learning will be interspersed with working, but in some cases the learning will have credits attached that can be added together to create a degree.

- 80% believe that short programs leading to a certificate, with the option of credits for further study leading to a degree, are useful development options

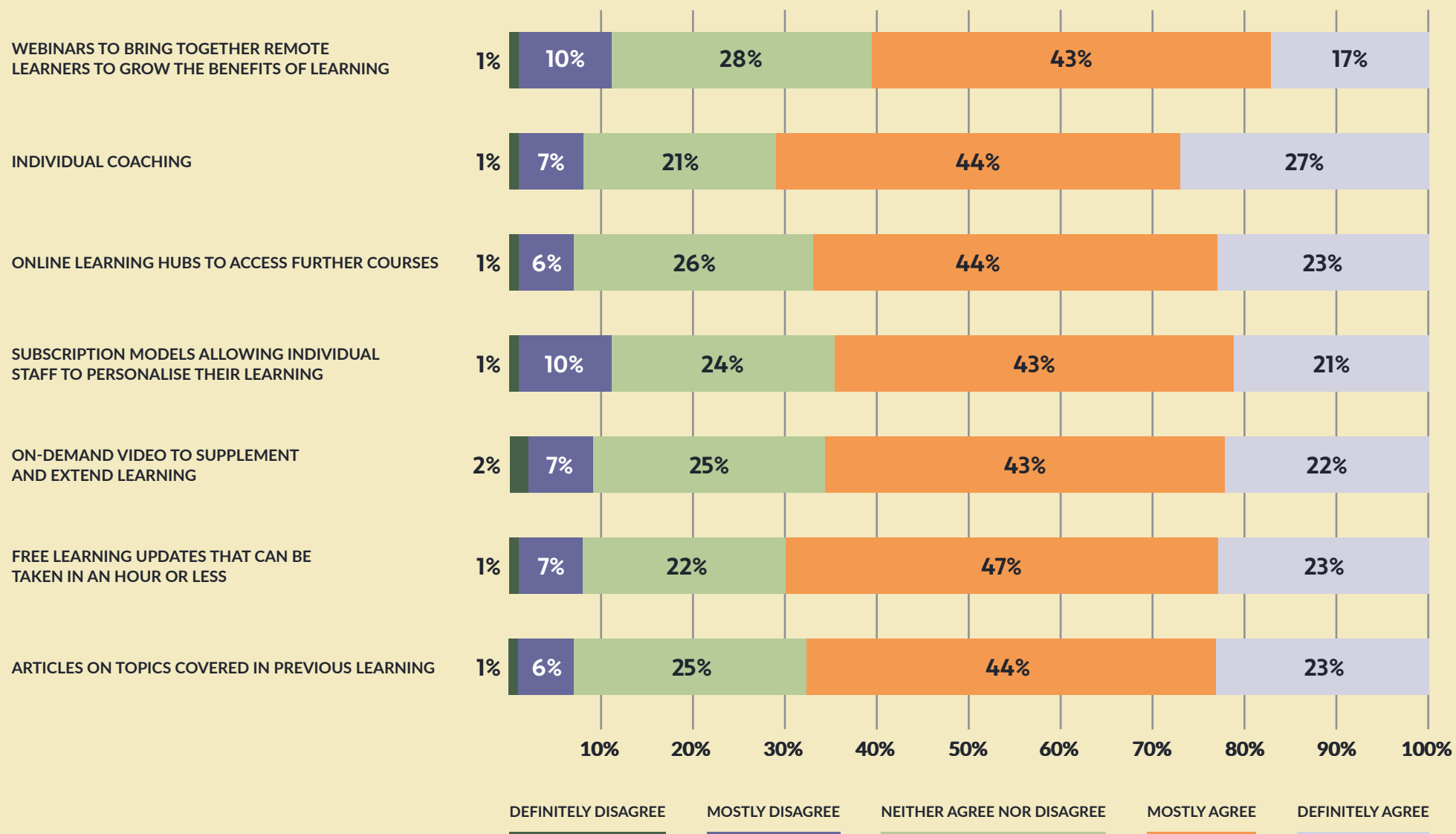
- 77% believe that short bursts of learning, delivered flexibly and providing microcredentials, are valuable in meeting development needs in their organisations.

For employers, the key to a successful learning outcome is impact in the workplace over an extended time period. To that end, it is important to have learning that ensures that impact can be extended through value-added activities. Coaching may be one way to do this, but employers are looking for other ways to extend learning impact. Activities considered very or extremely valuable by employers include:

- free learning updates that can be taken in an hour or less (70%)
- articles on topics covered in previous learning (67%)
- online learning hubs to access further courses (67%)
- on-demand video to supplement and extend learning (65%)



VALUE ADDED ELEMENTS SOUGHT BY EMPLOYERS BEYOND FORMAL LEARNING



Why learn and what to learn?

For many, learning has always been associated with advancing their career and growing their income. And while that remains the main reason for undertaking learning and development, skills now have a greater focus, whether that's learning new skills, updating skills, refreshing skills or adding specific knowledge.

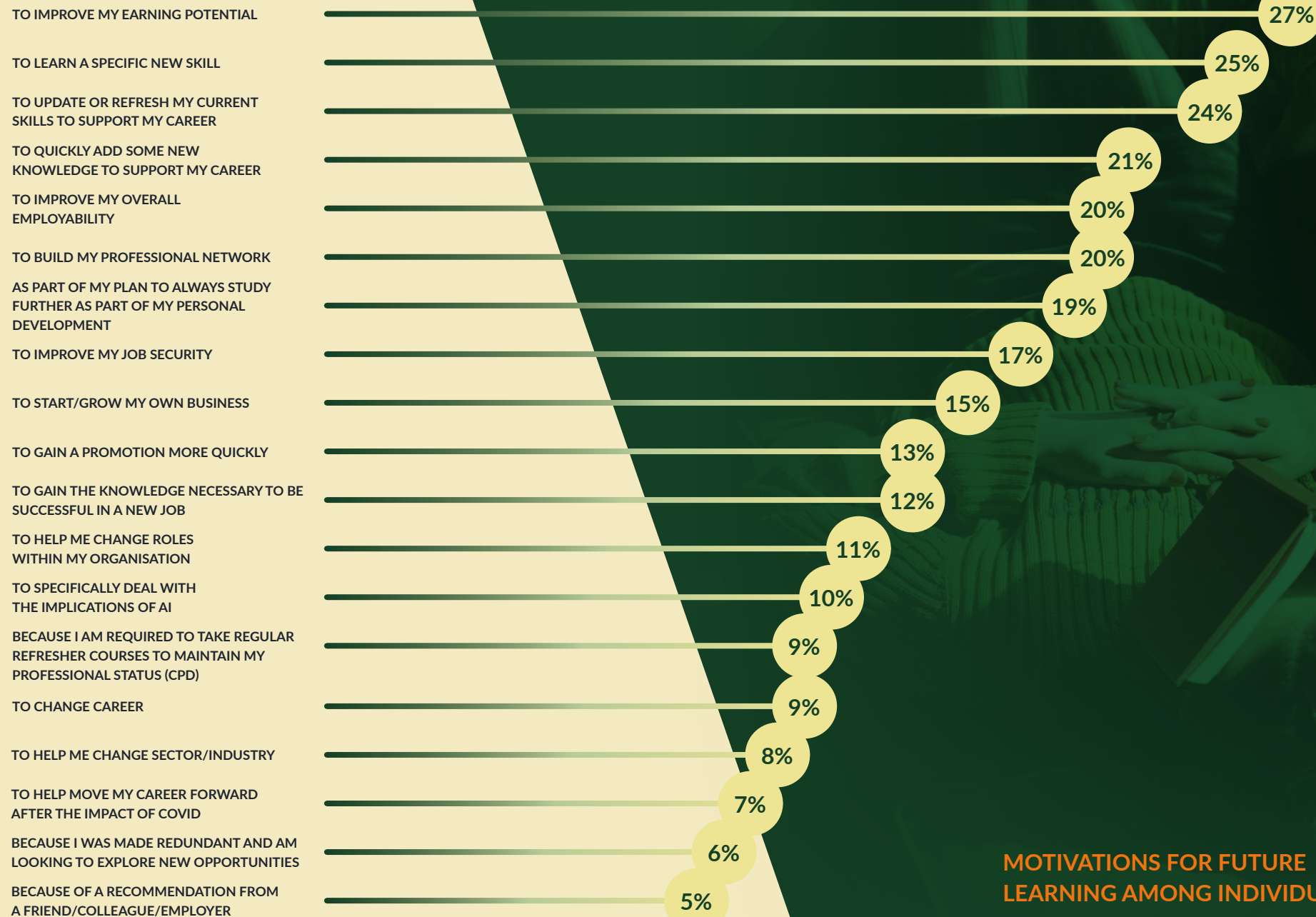
Many of those new or updated skills that are motivating learners are technology-related. Five of the top six skills that employees want to learn are technology-related, led by Artificial Intelligence. The only non-technology skill in the top six is Leadership. However, that doesn't mean that learners have abandoned non-technology skills. The second half of the top ten finds demand for business development, strategy, communication and innovation, with only one technology subject, digital transformation.

For many learners, although technology is important, it doesn't mean they want deep technical skills. An understanding of technology, an ability to use technology and putting technology in a business context are much more important than becoming a coder. There is a recognition of the importance of technology in the future of business and hence, its value in maintaining and accelerating a career.

The top six reasons given by individuals for undertaking new learning are:

- to improve my earning potential (27%)
- to learn a specific new skill (25%)
- to update or refresh my current skills to support my career (24%)
- to quickly add some new knowledge to support my career (21%)
- to improve my overall employability (20%)
- to build my professional network (20%)





**MOTIVATIONS FOR FUTURE
LEARNING AMONG INDIVIDUALS**

SKILLS LIKELY TO BE SOUGHT BY INDIVIDUALS IN THE NEXT FIVE YEARS



Learning technology

– online, on demand, flexible, certified and impactful

Learning about technology will increasingly mean learning with technology. While 38% of learners would consider in-person live face-to-face sessions for their studies, four other options provided to the survey respondents, all involving some element of technology, were more likely to be considered for courses.

Most popular was online blended (50%), providing learners with a mix of live virtual sessions and self-paced online learning, while online on-demand (purely self-paced study with no live classes or tutor interaction) would be considered by 47%. Blended (a mix of in-person face-to-face sessions and self-paced online learning) and hyflex (a mix of in-person face-to-face sessions, self-paced online learning and live streaming) would be considered by 46% and 40% respectively. However learners want to learn, the key seems to be flexibility.

Online learning can be delivered in many ways, leading to different expectations among learners. Whatever format is used, learners particularly value several elements in their learning experience:

- **Flexibility of study (57%)**
- **Completion certificate (56%)**
- **High quality video (53%)**
- **Instant online access (50%)**

APPROACHES TO LEARNING AMONG INDIVIDUALS

50%

Online blended (a mix of live virtual sessions and self-paced online learning)

47%

Online on-demand (self-paced with no live classes or tutor interaction)

46%

Blended (a mix of in-person face-to-face sessions and self-paced online learning)

40%

Hyflex (a mix of in-person face-to-face sessions, self-paced online learning and live streaming)

38%

In-person (live face-to-face sessions only)

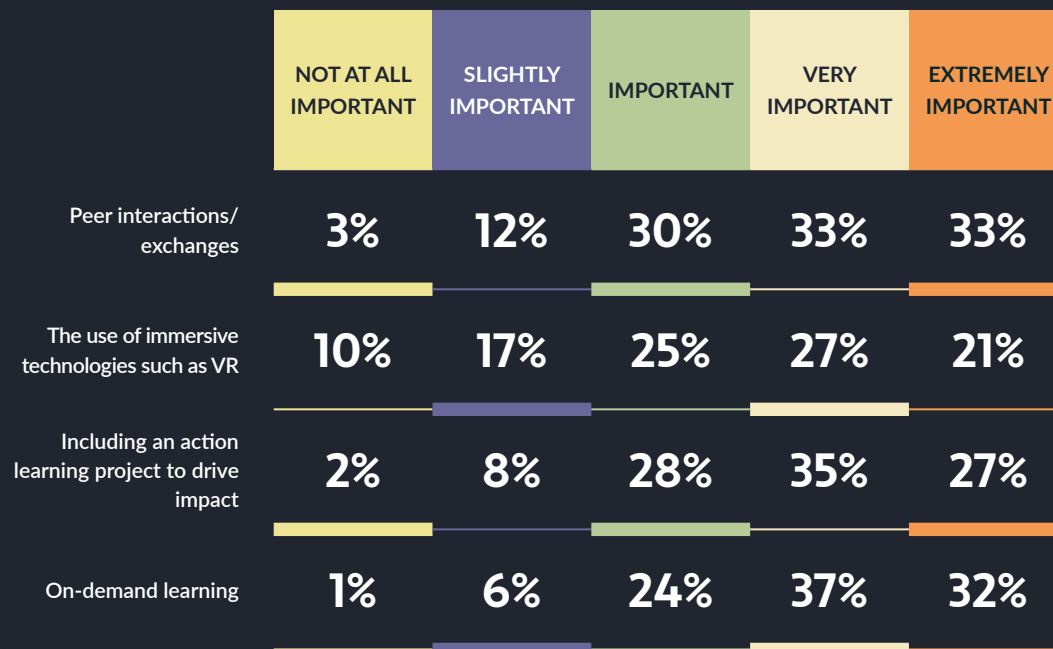
In a separate question, on-demand learning was described as very or extremely important by 60% of the learners taking the survey. For learners, the availability of on-demand provision means complete flexibility.

The employee who comes home from work on a Monday evening, after a conversation with their manager about the skill development they require, can become a learner later that night and begin utilising their new skills on Tuesday morning. However, not all learners are keen to embrace the potential of flexibility – 39% are not prepared to undertake learning outside of work hours, while 38% are open to such an approach.

Learners clearly want more than instant access technology. Almost half (48%) describe the use of immersive technologies, such as VR, as very or extremely important. Learners also value impact and interaction – 62% indicate that an action learning project to drive impact is very or extremely valuable and 56% have the same view of peer interactions/exchanges.

FOR LEARNERS
THE AVAILABILITY
OF ON-DEMAND
PROVISION
MEANS COMPLETE
FLEXIBILITY

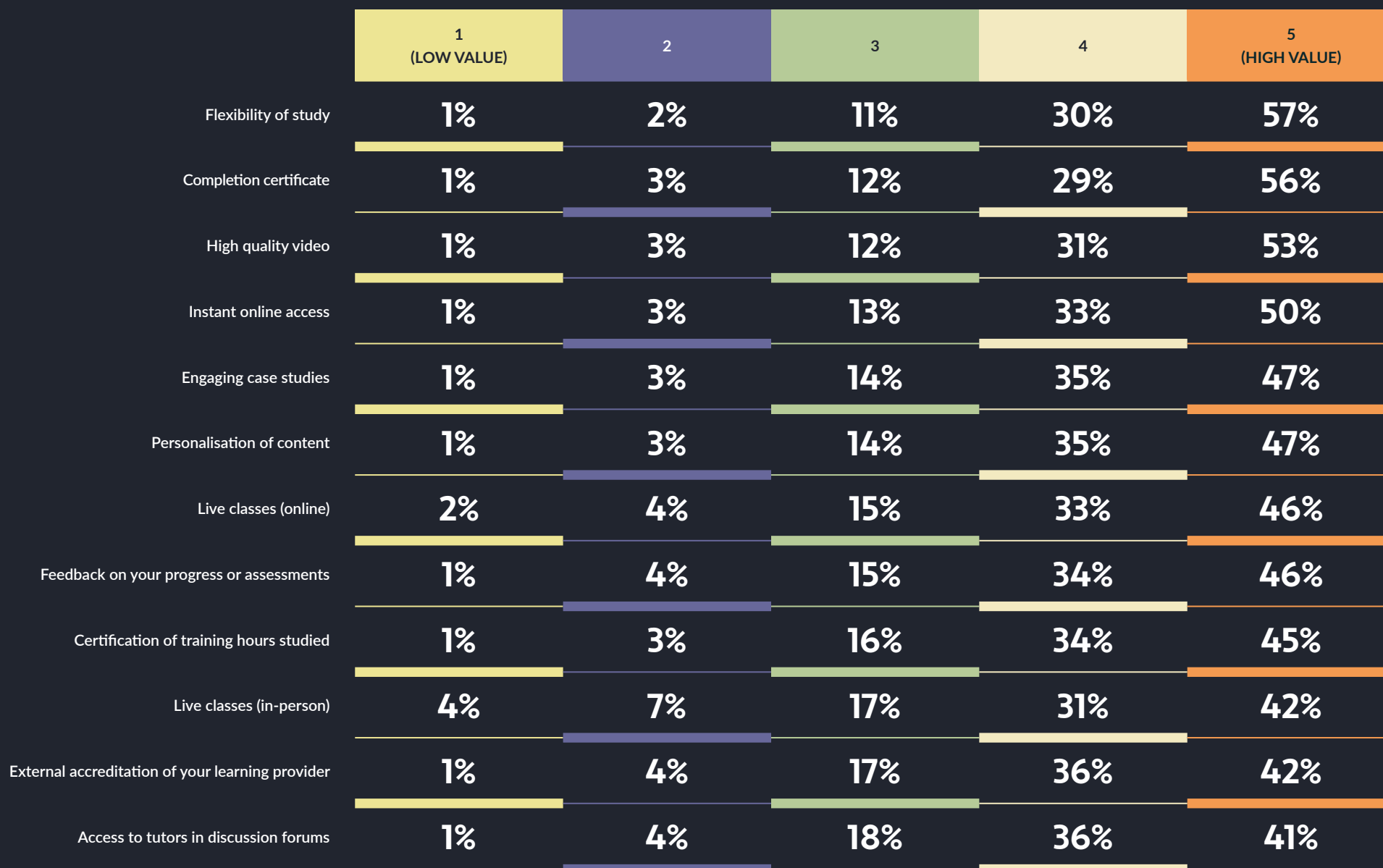
IMPORTANT ELEMENTS WHEN CONSIDERING ONLINE LEARNING



62%

OF LEARNERS INDICATE THAT AN ACTION LEARNING PROJECT TO DRIVE IMPACT IS VERY OR EXTREMELY VALUABLE

VALUE OF DIFFERENT ELEMENTS WHEN CONSIDERING A SHORT COURSE



Thinking qualifications

Personal, short, fast and, occasionally, degrees

It's not just new ways of learning that individuals want, but new formats to recognise their learning. Completion certificates have already been highlighted, and when asked specifically about qualifications sought, they are again highlighted, along with diplomas, as something that 31% might seek in the next five years to recognise their learning.

Most popular is industry certification, recognising both the value of existing qualifications and the brand power delivered by the professional and corporate bodies providing these certifications. Recognised and valued by employers, industry certifications are highly portable in the labour market, helping individuals move jobs and advance their careers.

While flexibility may be the key to learning, diversity is the focus of qualifications. Alongside industry certifications, CPD and diplomas/certificates, online courses from a business school and short course, non-degree programs are likely to be sought by 33% and 27% of learners, respectively.

There also remains a market for more traditional degree qualifications, although it is smaller than some of these other options. The following degree types are sought by around one in four or one in five of the learners questioned:

- **Specialised and Executive Masters degrees (e.g. MSc, MiM, MA, etc) (23%)**
- **MBA degrees (23%)**
- **Executive MBA degrees (20%)**

As with employers, only a relatively small percentage of learners (13%) want a microcredential, but again this may be more to do with terminology rather than anything else. At least four of the top seven choices of qualification might be described as a microcredential.

**RECOGNISED
AND VALUED
BY EMPLOYERS,
INDUSTRY
CERTIFICATIONS ARE
HIGHLY PORTABLE IN
THE LABOUR MARKET**

QUALIFICATIONS AND SUPPORT LIKELY TO BE SOUGHT IN THE NEXT FIVE YEARS



Learning journeys focused on career destinations

Lifelong learning, as the name suggests, is a journey, rather than a destination, and that story is borne out by the data from the study.

- 77% agree that, in the future, they expect to undertake more learning to upskill and reskill in order to advance their career
- 79% expect to have to update their learning more frequently in the future to keep up to date with skill needs
- 70% expect to/already have changed career direction at least once during their working life
- 63% would be very or extremely interested in creating their own certificate journey by combining courses in different formats
- 59% expect to retire later than they thought when they first started working.

The demand for learning may, in part, be driven by different attitudes to work. The shift to remote working brought about by the pandemic is not something that individuals are ready to give up; 83% agree that, in their future career, they want to have the flexibility to work from home some of the time. Only 55% expect to work full time in an office as their career advances.

THE DEMAND FOR
LEARNING MAY IN
PART BE DRIVEN
BY DIFFERENT
ATTITUDES TO WORK

79%

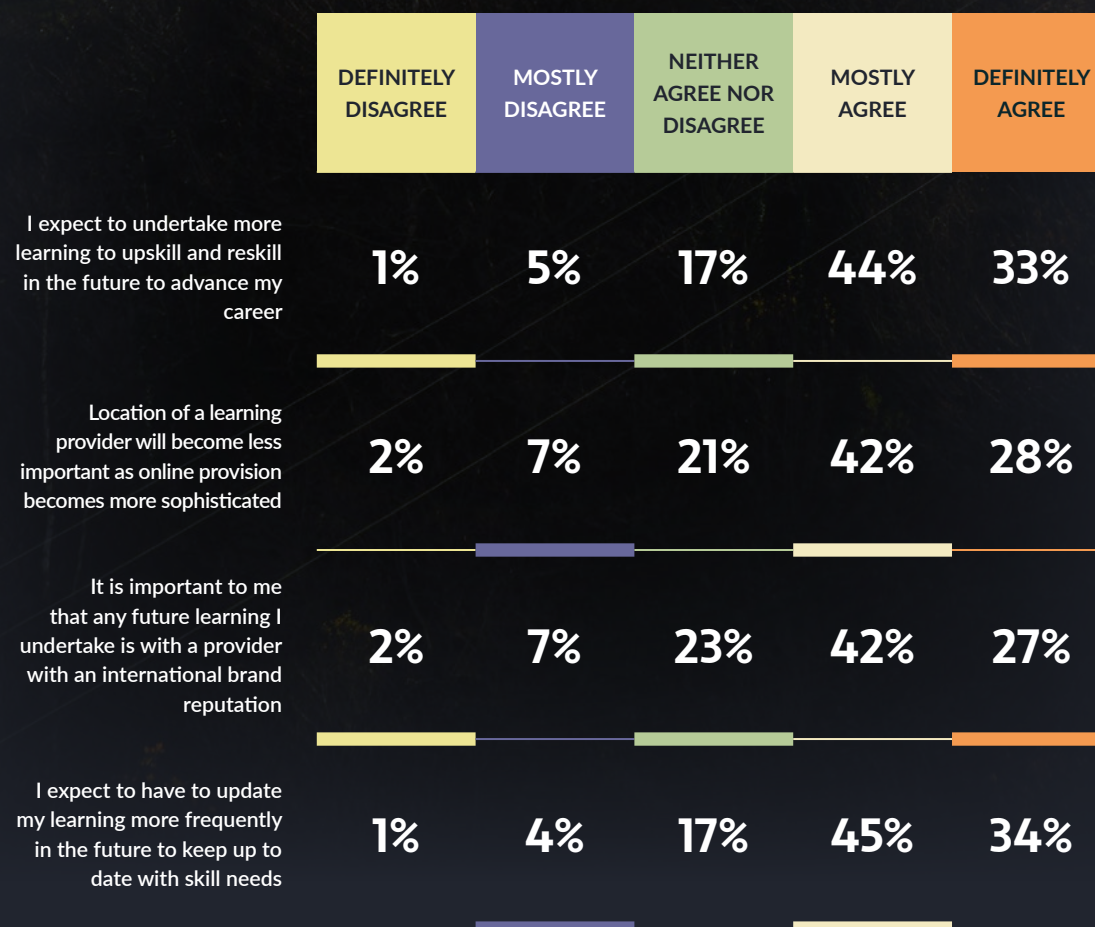
EXPECT TO HAVE TO UPDATE MY LEARNING
MORE FREQUENTLY IN THE FUTURE TO
KEEP UP TO DATE WITH SKILL NEEDS

The nature of the learning that individuals want or expect is also changing. Almost seven out of ten respondents (69%) indicate that it is important to them that any future learning they undertake is with a provider with an international brand reputation. Competition between learning providers has grown significantly in recent years, with many new entrants outside of higher education entering the marketplace. Consequently, the power and value of brand in signalling quality and impact for learners has become more important.

However, brand loyalty may not be strong. Just over two-thirds (68%) would be very or extremely interested in a Netflix-style platform for learning where they can choose from a variety of providers. In the same vein, 65% would be interested in joining a community of learners to continue peer learning beyond formal studies and 61% in a learning subscription allowing them to access courses as and when they wish. Familiar patterns of learning engagement are likely to continue to evolve, with flexibility being to the fore: 80% want learning to be delivered flexibly if they are to fully engage.

Yet, employees are keen to engage and see learning as an important element in any package offered by a future employer. Around three-quarters of respondents indicate they would be more likely to stay at an organisation that values and supports their professional development (78%), while 74% would be more likely to join an organisation that offered lifelong learning as part of their package.

FUTURE TRENDS FOR INDIVIDUAL LEARNING AND DEVELOPMENT

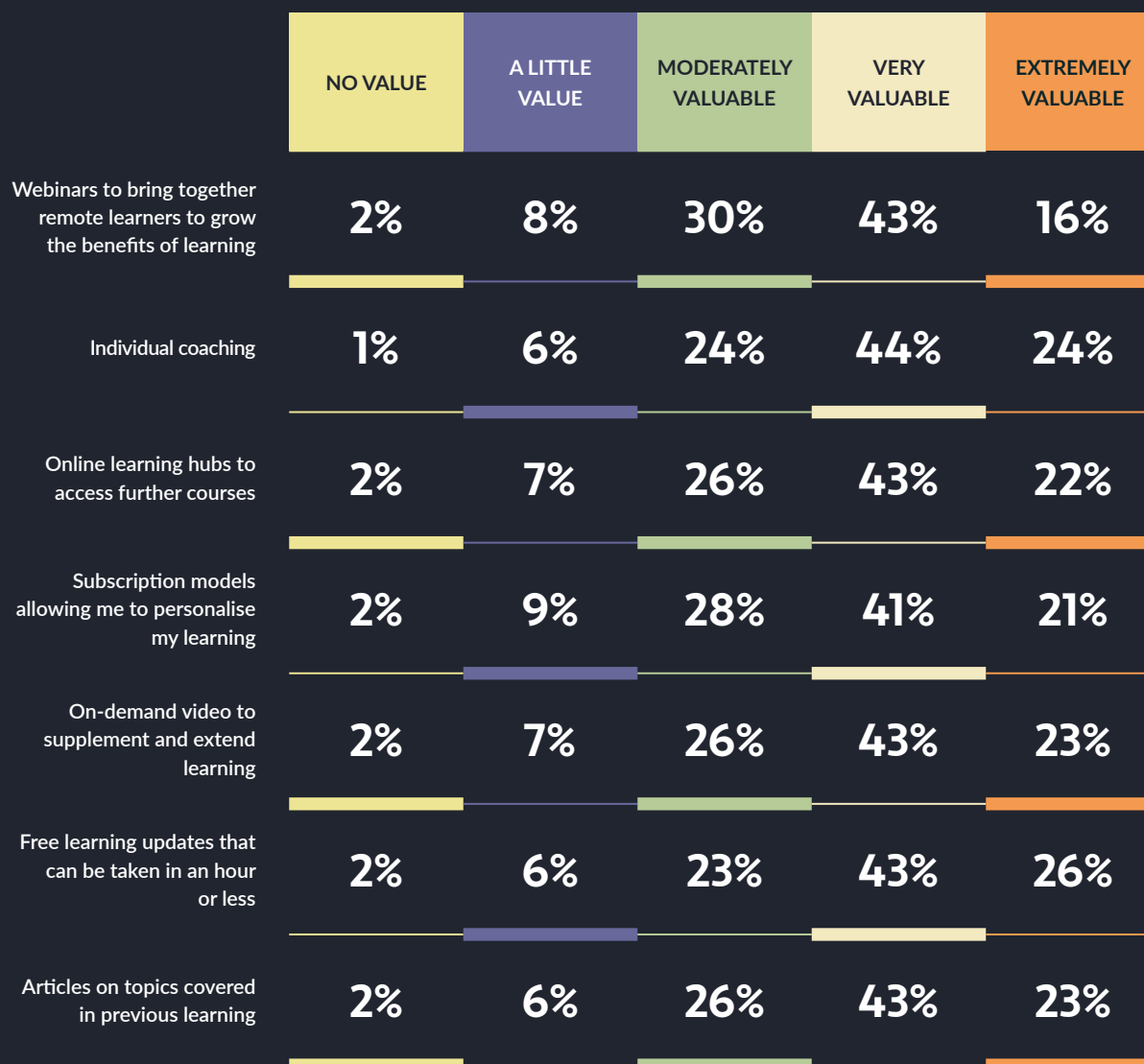


However, learners choose to learn, they are keen to embrace a variety of activities to add value to their learning experience and extend its impact. Almost seven in ten describe individual coaching (68%) and free learning updates that can be taken in an hour or less (69%) as very or extremely valuable to maintain or grow the impact of their learning. Just under two-thirds of the learners taking the survey also describe the following as very or extremely valuable:

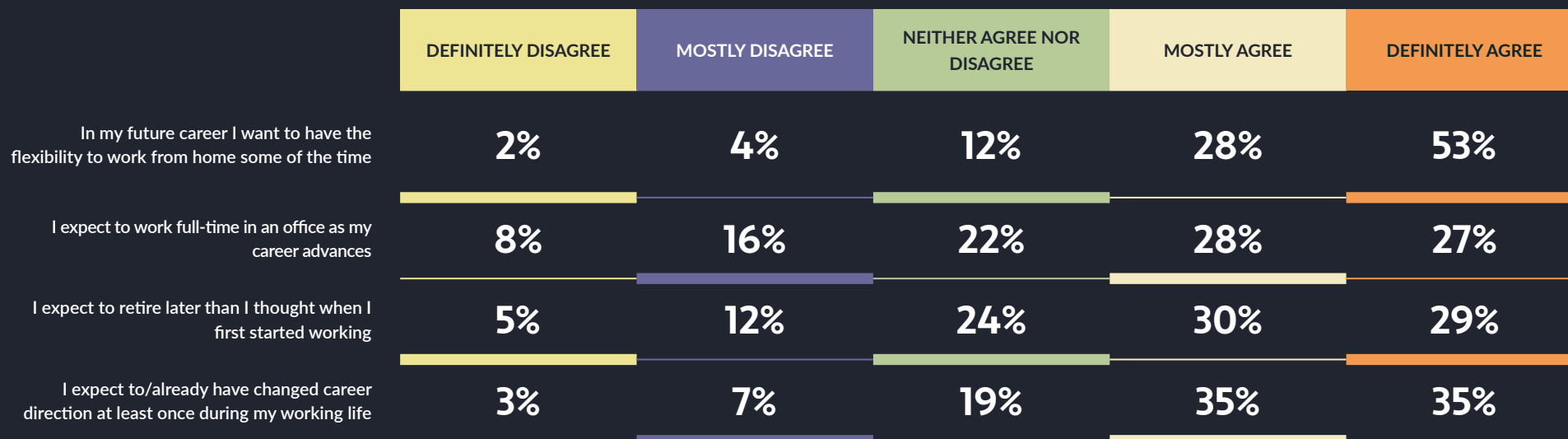
- Online learning hubs to access further courses (65%)
- On-demand video to supplement and extend learning (66%)
- Articles on topics covered in previous learning (66%)

HOWEVER, LEARNERS
CHOOSE TO LEARN,
THEY ARE KEEN TO
EMBRACE A VARIETY
OF ACTIVITIES

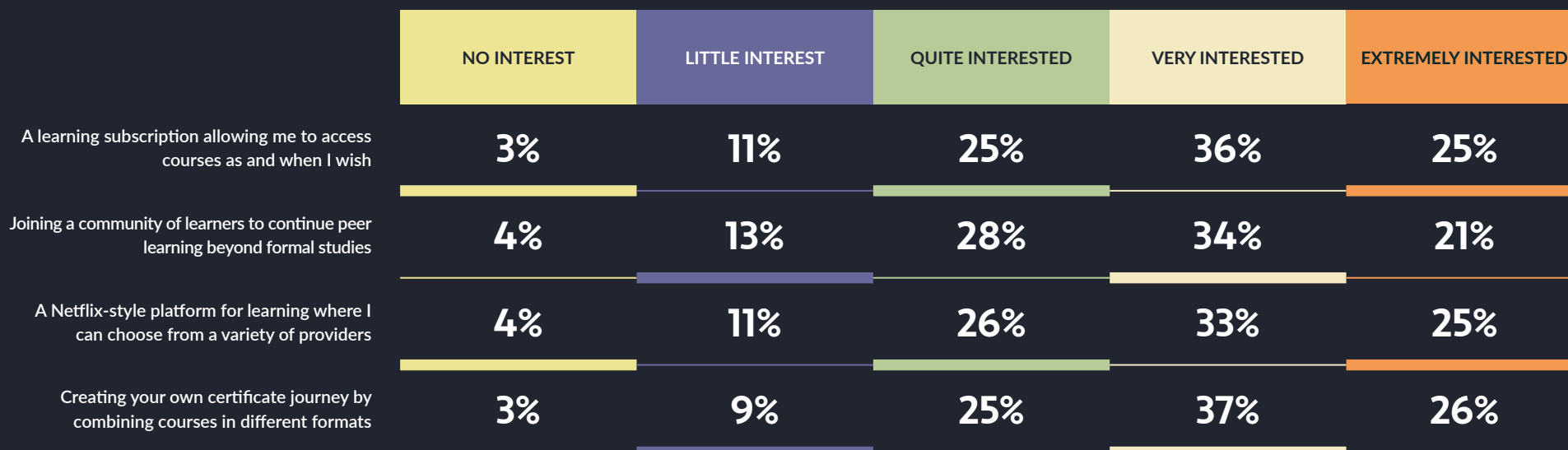
ACTIVITIES SOUGHT BEYOND FORMAL LEARNING TO GROW IMPACT



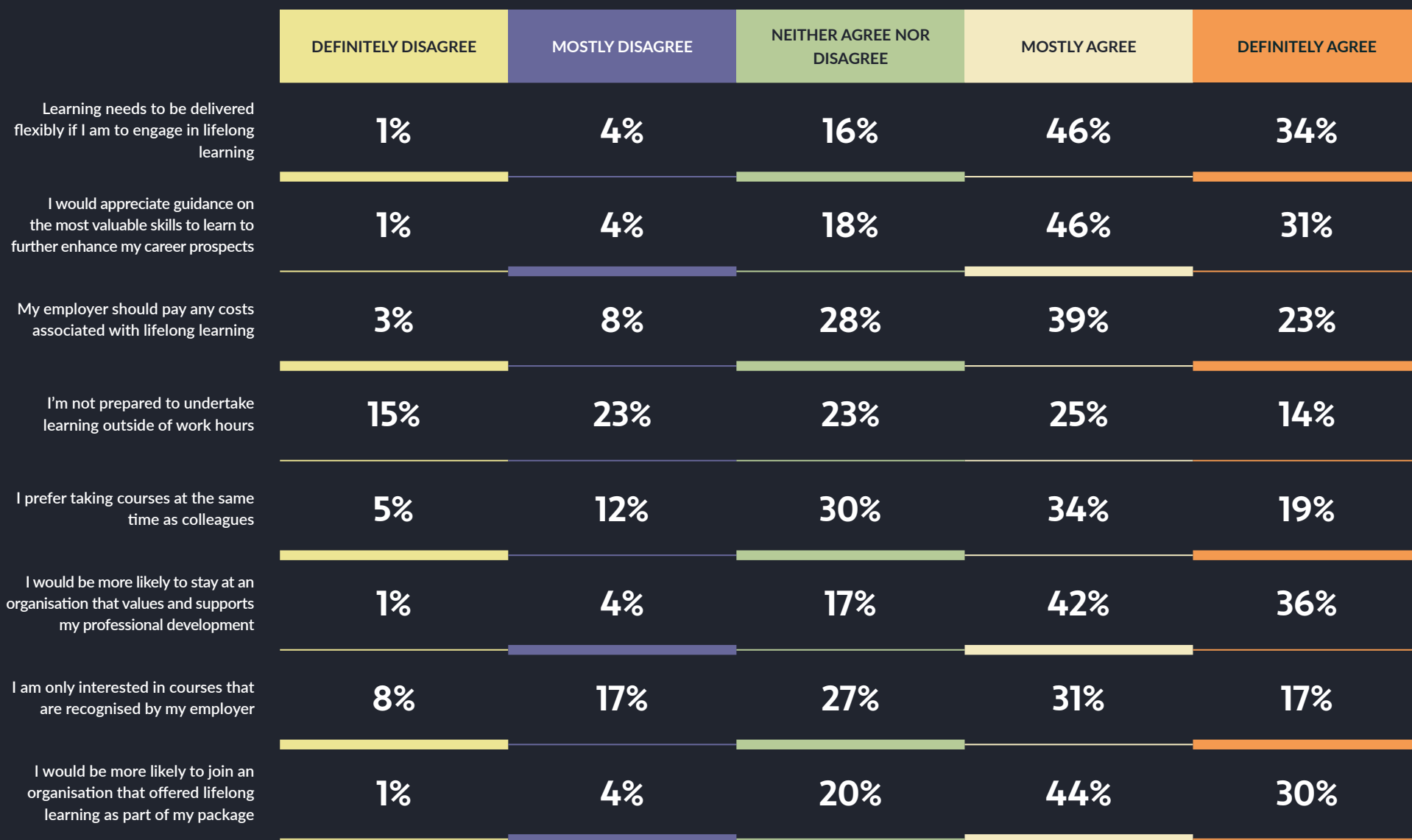
THE FUTURE OF WORK – LEARNER PERSPECTIVES



CONSIDERATION OF NEW APPROACHES TO LEARNING AND DEVELOPMENT



VIEWS ON DIFFERENT ASPECTS OF LIFELONG LEARNING



Learning Choices

Business schools and universities face considerable competition in the lifelong and executive education marketplace. Among employers, 35% would use a business school. However, among learners that increases to 45%.

With 40% of the learner respondents being aged under 36, many will have had a recent experience of higher education when taking a degree, undergraduate and/or postgraduate, helping them to better understand the breadth and potential of a business school/university offer. Among employers, perhaps aged over 40, their awareness and understanding of a business school/university offer may be very undergraduate focused and 20 years out of date.

Both employers and learners are most likely to use an online provider for their learning, chosen by 57% and 55% respectively. For employers, there are a wide variety of learning providers that they would use ahead of business schools:

- Private training company (51%)
- Professional/industry/trade body (49%)
- Consulting firm (43%)
- In-house service (42%).

**AMONG EMPLOYERS,
35% WOULD USE A
BUSINESS SCHOOL,
AMONG LEARNERS THAT
INCREASES TO 45%**

PROVIDERS CONSIDERED BY EMPLOYERS FOR FUTURE LEARNING



57%

Online learning provider



51%

Private training company



49%

Professional/industry/
trade body



43%

Consulting firms



42%

In-house service



35%

Business schools



34%

Freelance consultants



30%

Public training body



25%

Chamber of Commerce

PROVIDERS CONSIDERED BY INDIVIDUALS FOR FUTURE LEARNING



57%

Online learning provider



45%

Business school



44%

Professional/industry/
trade body



41%

Private training company



26%

Consulting firm



26%

Public training body



24%

In-house service



23%

Freelance consultant



18%

Chamber of Commerce

The case for and against business schools and universities

Choosing which provider to use for learning is rarely as simple as a Google search. Many factors will need to be considered – content, price, timing, delivery mode and reputation, to name a few.

For employers, business schools are sometimes seen as out of touch with the real world, too expensive, not having the expertise sought and, in some cases, simply not offering good, local provision. Administration can also be a problem, with 16% suggesting that working with business schools is too bureaucratic and they are too slow to respond to enquiries.

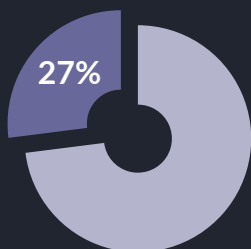
Yet, for some employers, business schools do have a valuable offer. Being able to deliver learning and development at different leadership levels, offering flexible solutions and drawing on a wide range of content, not just in business schools, but across parent universities, makes for an attractive platform for those seeking learning and development solutions.

Among individual learners, business schools are also regarded as too expensive and out of touch. Almost one in five (19%) learners looking for a short course believe that business schools only offer degrees and 16% are unaware that schools offer executive and management development programs.

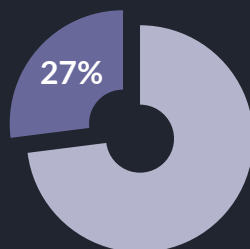
A similar percentage, 17%, believe that there are no quality schools near to where they live/work. This problem is further complicated by the 16% who believe business schools lack an online offer, meaning they would have too far to travel for study.



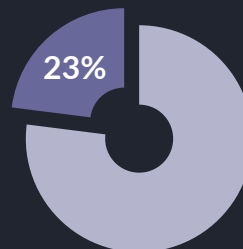
REASONS EMPLOYERS DON'T USE BUSINESS SCHOOLS



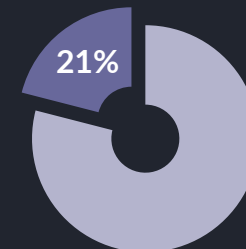
Business schools are too theoretical and not sufficiently abreast of the real-world business challenges we face



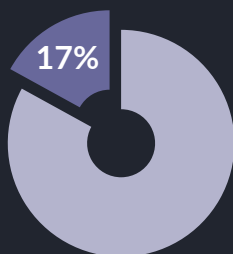
Other providers offer programs that better meet our development needs



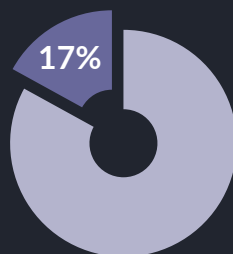
Business schools are too expensive



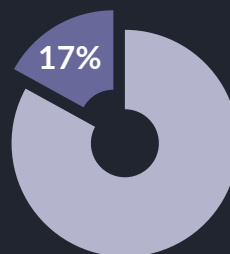
Business schools don't have the specific expertise we are seeking



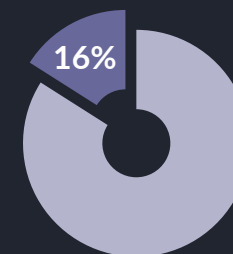
There are no good quality business schools near our facilities



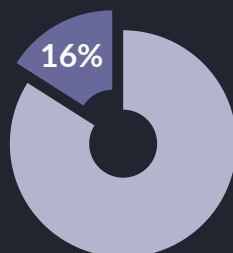
Business schools lack an online offer, meaning they are too far away for our staff to travel



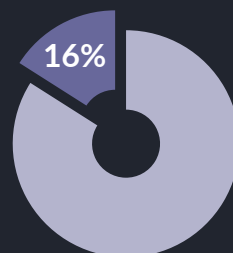
We have not seen any real impact back in the workplace after investing in a business school program



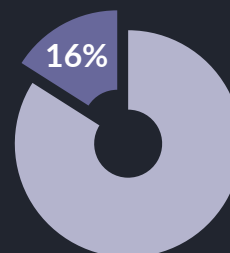
Our organisation stopped using business schools after previous poor experiences



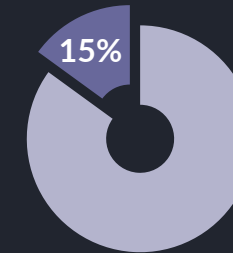
Our organisation only uses in-house provision



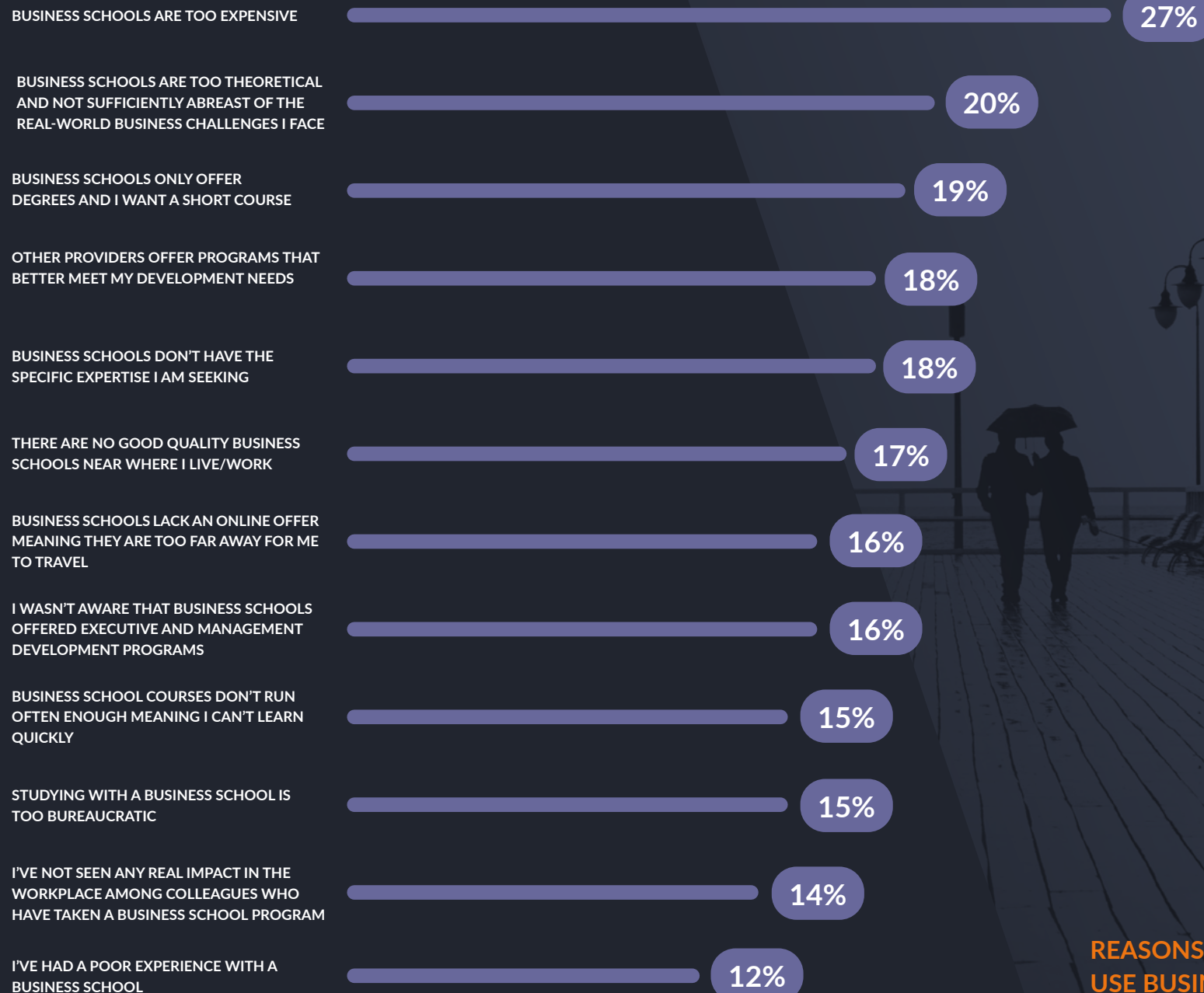
Working with a business school is too bureaucratic



Business schools are too slow to respond to our enquiries



I wasn't aware that business schools offered executive and management development programs



**REASONS INDIVIDUALS DON'T
USE BUSINESS SCHOOLS**

Despite the many reasons identified for not using business schools and universities, employers also indicate a number of important elements of a school offer that make them strong learning partners. Most important, and chosen by more than a third of employers are:

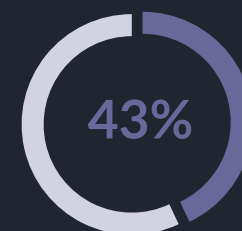
- solutions that fit various leadership levels in our talent pool (43%)
- a wide range of subjects offered (36%)
- the flexibility of solutions offered (34%).

Of course, a business school on its own will provide a wide variety of topics, but a business school inside a comprehensive university may be in an even stronger position, able to draw upon a host of specialists in other subject areas. The ability to combine content, to do it flexibly and in so doing, meet the needs of specific employers, may be key for business schools and universities competing against private sector providers.

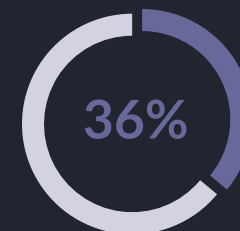
For individuals, five reasons stand out when choosing business schools:

- Business schools have a reputation for developing knowledge (54%)
- The quality of faculty delivering courses (48%)
- Business school research adds value to the learning provided (47%)
- A wide range of subjects offered (46%)
- To build a personal network (41%)

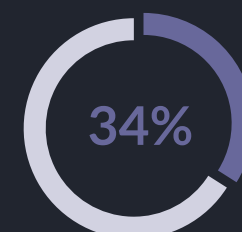
REASONS GIVEN BY EMPLOYERS TO USE BUSINESS SCHOOLS



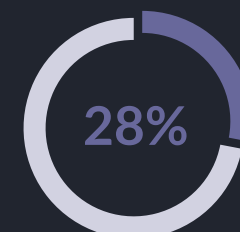
Solutions that fit various leadership levels in our talent pool



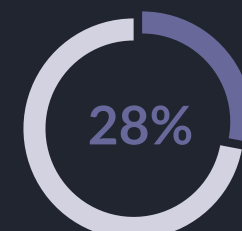
A wide range of subjects offered



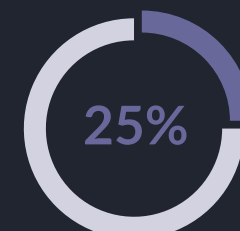
Flexibility of solutions offered



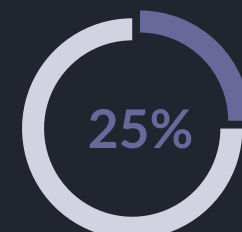
Proximity of schools to our business locations



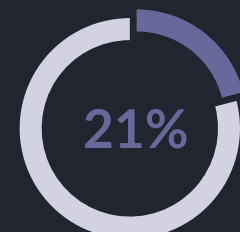
Content backed by research



Quality of faculty delivering courses



Long standing relationships with key schools

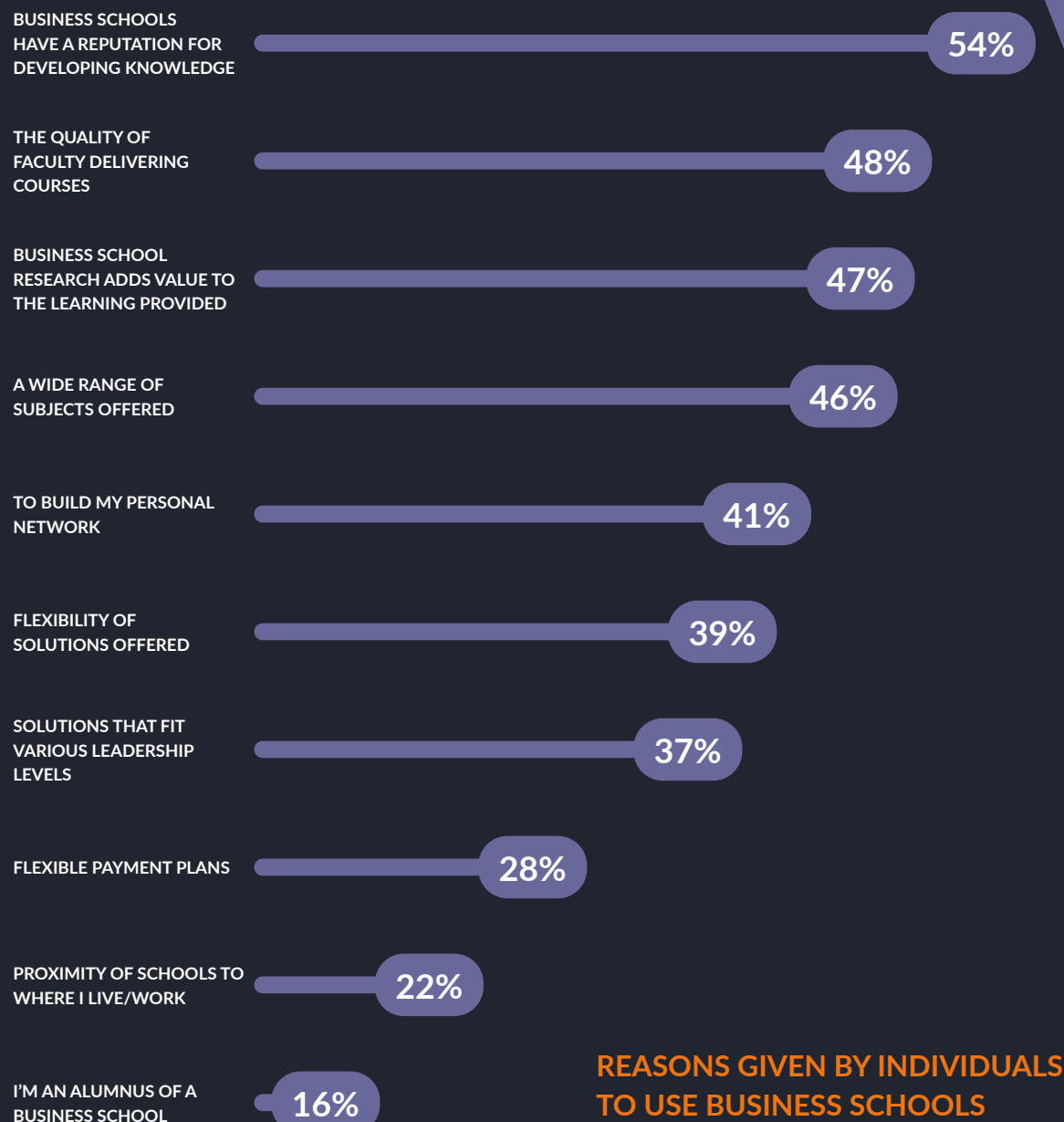


Flexible payment plans

Again, breadth of content is important, but also content inspired by research, something that an online provider can't offer. Research undoubtedly adds value to a school's offer in the lifelong and executive education space, but it needs to be applied to real-world business challenges to maximise its value. A business school in a comprehensive university needs to leverage the strengths of both their own faculty and other faculties to make the most of the desire for a wide range of content, something that online providers may struggle with.

Faculty quality, where someone has a mastery of their subject from years of teaching and research, is again difficult for online providers to offer, unless they hire faculty to deliver for them. Building a network is also difficult for online providers to offer. Indeed, this is almost impossible when online learning is offered in a self-paced environment.

Much research from CarringtonCrisp in recent years has found that blended study is popular with learners and, in part, this is being driven by the desire to build networks. Being on-campus at the same time as other learners probably offers the best opportunity to build valuable networks among learners.



A wider market of digital brands

COVID produced an explosion of new providers entering the learning and development marketplace. Some existed before COVID, some were new during COVID, but all grew substantially while many employees were stuck at home during lockdowns, seeking skills to advance their careers, perhaps in new directions post-COVID. HolonIQ produced research, just six months into COVID, which suggested that, in five years' time, the size of the online learning marketplace would be US\$20 billion larger than had been forecast at the start of the pandemic.

Ask individual learners if they are aware of some of the technology-led learning providers and LinkedIn Learning dominates, known by 60%; perhaps not surprising when 84% of the learner respondents say they have a LinkedIn account and 71% use that account at least two or three times a week.

Udemy and Coursera are also widely known, by 37% and 33% of learners, respectively. Perhaps more importantly for business schools and universities is the repeat business that many of the online providers seem to be able to generate; brand loyalty is strong.

COVID PRODUCED
AN EXPLOSION OF
NEW PROVIDERS
ENTERING THE
LEARNING AND
DEVELOPMENT
MARKETPLACE

84%

OF THE LEARNER RESPONDENTS SAY
THEY HAVE A LINKEDIN ACCOUNT

AWARENESS OF DIGITAL PROVIDERS OF LEARNING



Where in the World

Interest in online providers is also reflected in the data when employers and individuals are asked about studying outside their home country. Of course, international study might be with a business school or university, as much as with an online provider, and the data suggests there is an opportunity to attract international learners, especially online.

Just over a third (36%) of employers would send their staff to study with a provider in a country where they are not primarily based for work, while more than half (58%) would have their staff take a course online with a business school in a country where they are not primarily based for work.

International providers, previously out of reach to many, may now be easily accessed through online learning. Among individual learners, 42% would consider physically studying internationally, while 55% would take a course online with a business school in a country where they are not primarily based for work.

While learners are open to taking courses on the other side of the world, navigating the variety of offers available in a highly competitive market can be perplexing at times. More than three-quarters (77%) would appreciate guidance on the most valuable skills to learn to further enhance their career prospects.

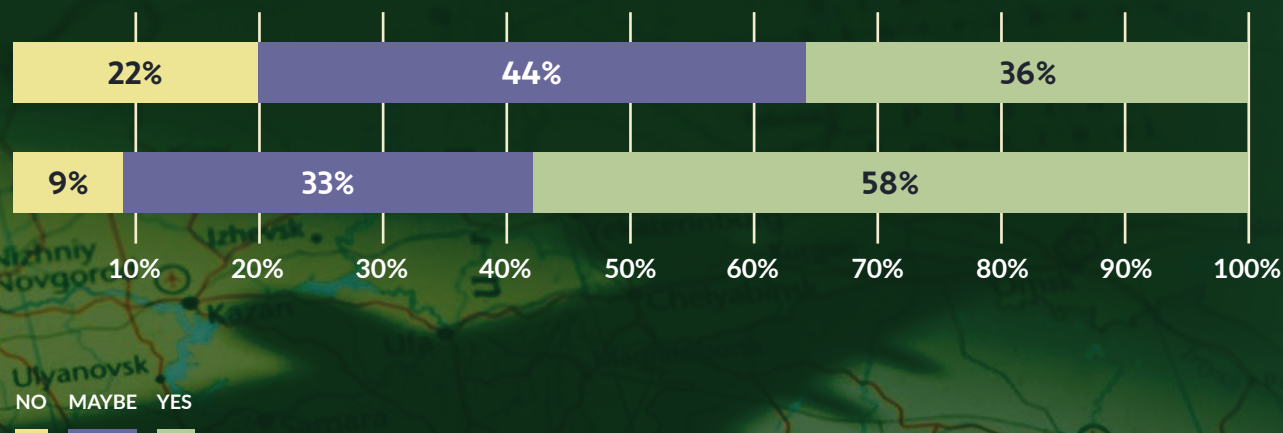
A hand is pointing at a world map drawn on a dark green chalkboard. A small white model airplane is resting on the map, positioned over the Atlantic Ocean. A white circle is overlaid on the bottom right of the image, containing text.

**INTERNATIONAL
PROVIDERS
PREVIOUSLY OUT
OF REACH TO MANY,
MAY NOW BE EASILY
ACCESSED THROUGH
ONLINE LEARNING**

EMPLOYER CONSIDERATION OF INTERNATIONAL LEARNING FOR STAFF

SENDING THEM TO STUDY WITH A PROVIDER IN A COUNTRY WHERE THEY ARE NOT PRIMARILY BASED FOR WORK

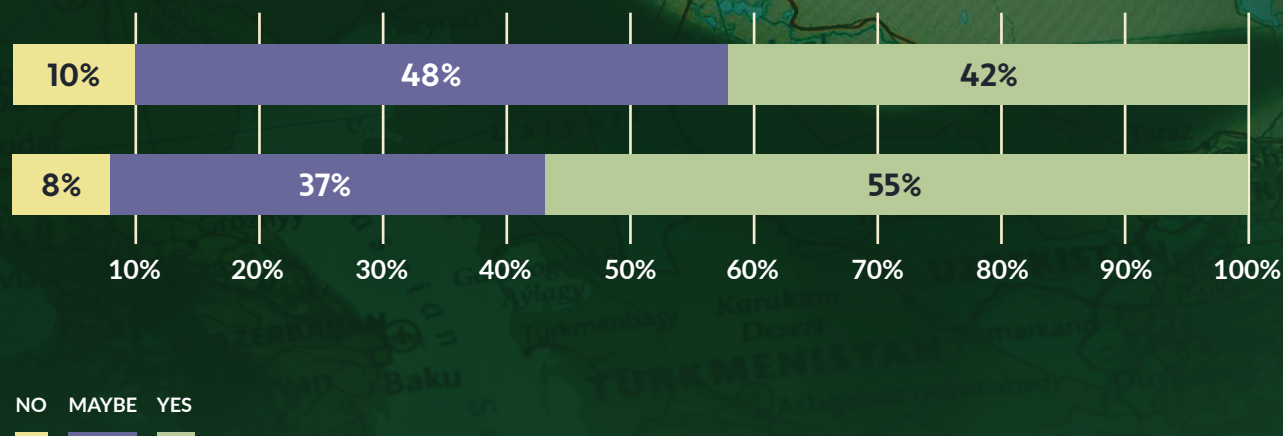
HAVE THEM TAKE A COURSE ONLINE WITH A BUSINESS SCHOOL IN A COUNTRY WHERE THEY ARE NOT PRIMARILY BASED FOR WORK



INDIVIDUAL CONSIDERATION OF INTERNATIONAL LEARNING OPTIONS

STUDYING WITH A PROVIDER IN A COUNTRY WHERE YOU ARE NOT PRIMARILY BASED FOR WORK

TAKING A COURSE ONLINE WITH A BUSINESS SCHOOL IN A COUNTRY WHERE YOU ARE NOT PRIMARILY BASED FOR WORK



What attracts learners and where?

Wherever learners hope to learn, they are, not surprisingly, likely to begin their search online. Just over six out of ten (61%) respondents begin their search for a learning provider online. Given the number of learners using business schools, it's also not surprising that 41% use a business school or other provider website. Almost four out of ten (39%) respondents use social media networks.

For more than a quarter (28%) of the respondents, the starting point in their search for learning is to look backwards and return to the institution where they previously studied. Too often alumni are overlooked as a market for future learners. Sometimes they are seen as having completed their learning and, in other cases, are more about their potential financial contribution. Having previously purchased learning from an institution, alumni are repeat buyers, a category that usually require less resources from a provider to generate a future purchase.

When a prospective learner turns to social media, they are most likely to be using LinkedIn (78%), with YouTube (73%) just behind. For some, YouTube may also be the final destination for their learning, with a host of free resources for those looking for an introduction to a particular skill. Facebook is used by 63% and Instagram by 57%, highlighting the wide use of these tools by those seeking to connect with learning providers.



61%

OF RESPONDENTS BEGIN
THEIR SEARCH FOR A
LEARNING PROVIDER ONLINE

4/10

RESPONDENTS USE SOCIAL
MEDIA NETWORKS

Simply being on social media is not enough to ensure a steady flow of prospective learners; business schools and universities need to produce engaging and appropriate content. Here, business schools and universities again have an advantage over many online providers – prospective learners want content that schools already have. The most sought content on social media is:

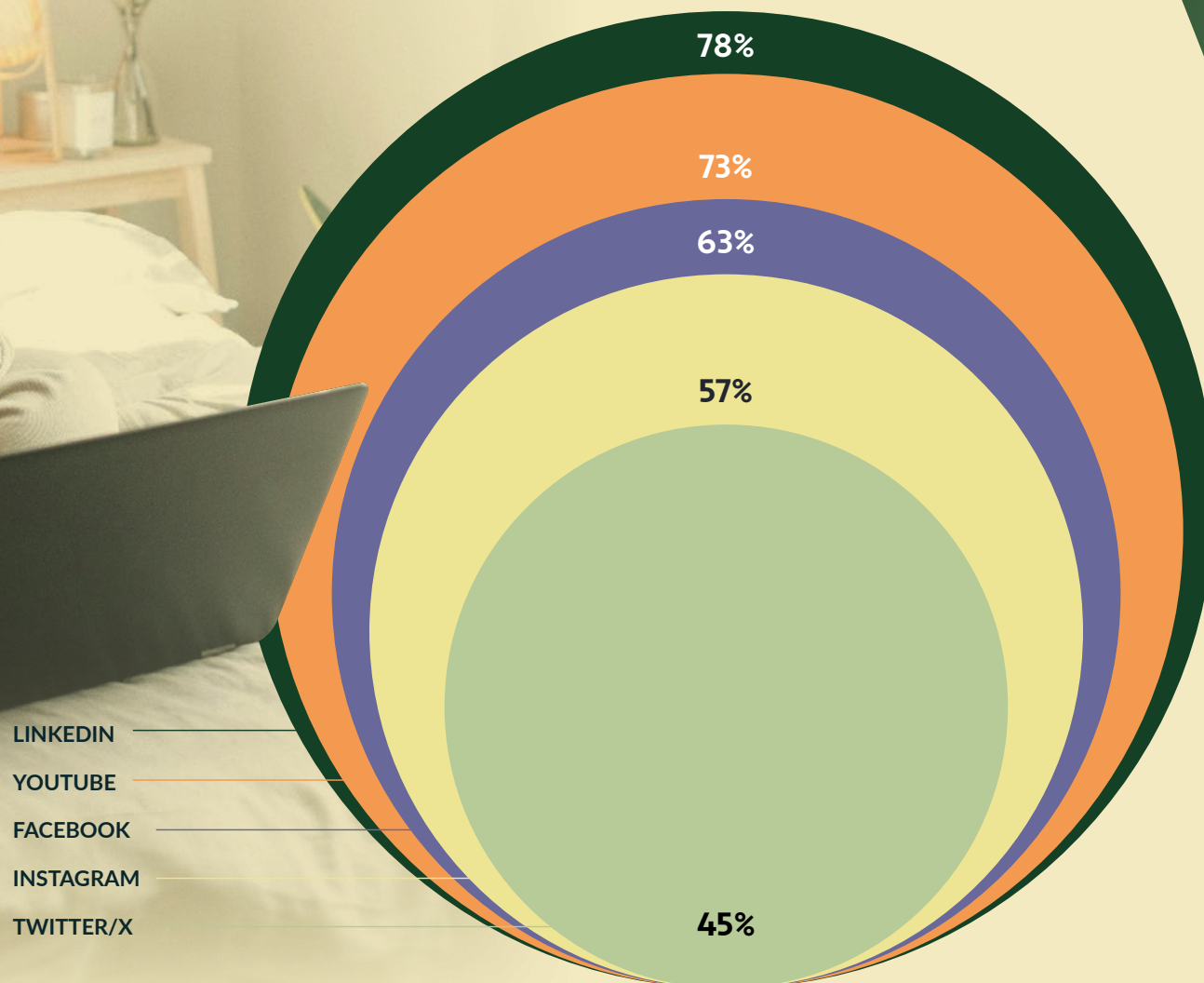
- academic research (40%)
- business cases studies (36%) and,
- programme-specific content (30%).

Prospective learners are probably not looking for detailed academic papers, but instead bite-sized content that introduces research and connects it to the real-world problems they are trying to solve in their careers.

CONTENT MOST VALUED ON BUSINESS EDUCATION SOCIAL MEDIA SITES



USE OF SOCIAL MEDIA TOOLS BY INDIVIDUALS WHEN SEEKING LEARNING



Priorities for providers

For a business school or university looking to build its lifelong and executive education offer, understanding market need and/or desire is key. Individual learners have a long list of what they want from a provider, but the three items ranked most important are:

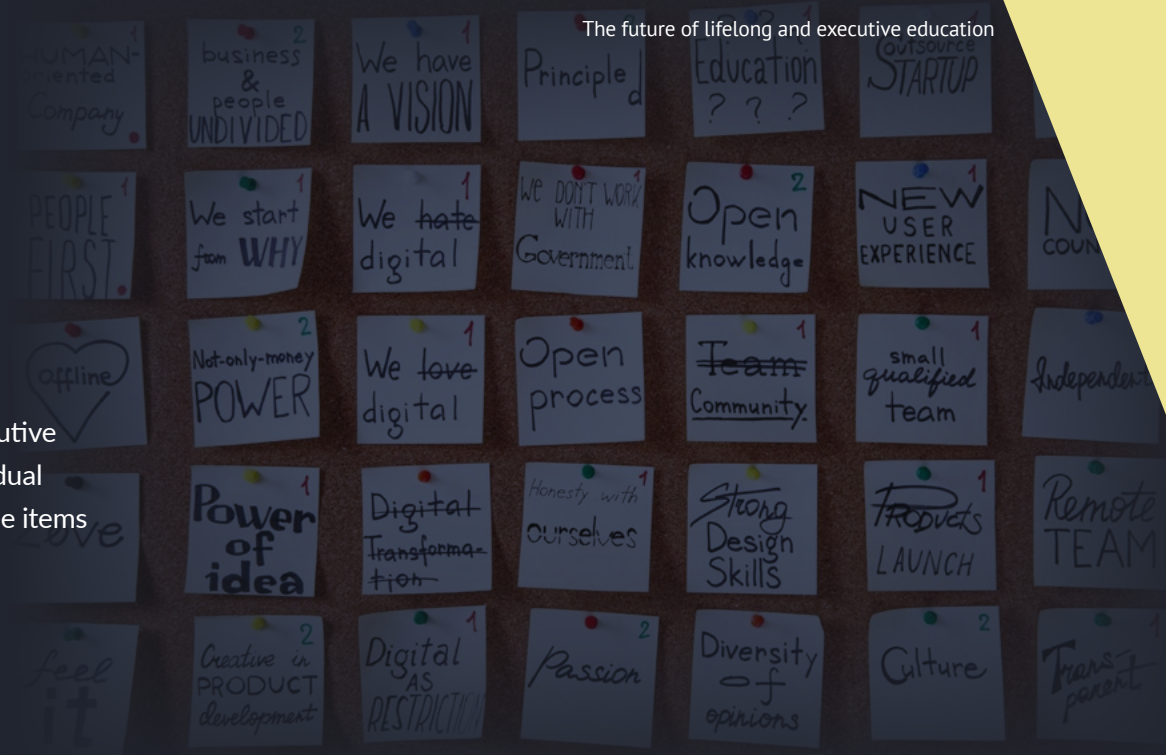
- provides support to develop my career (38%)
- is highly ranked (38%)
- offers good value courses (37%)

These priorities provide clear encouragement for both business schools/universities and online providers. Support for careers could favour both business schools and online providers. The recognition of the academic excellence of a business school may be seen favourably by an employer, whereas a short course with an online provider may deliver a quick career impact. Rankings play better for business schools, but value may be a strength for online providers.

Further down the list, there are similar mixed messages for online providers and business schools/universities. Internationally recognised accreditation, the fourth most important requirement, is likely to be something that business schools and universities can provide to a greater extent than online providers, but good customer service, ranked equally in fourth place, might be seen more among online providers.

In equal seventh place is strong brand reputation, something that might be a positive for either a business school/university or a private provider. Brand is certainly something that is becoming more important for all providers. Brands that have international reach, that have a reputation for quality learning outcomes, that offer relevant and broad content and that can deliver flexibly will be able to build strong offers in the learning marketplace.

When asked specifically what business schools should do for learners, the answer is pretty much everything from more flexible approaches to degrees through to short, inexpensive programs to deliver relevant skills for those who are working. Two of the top priorities are providing clear routes to enable and support lifelong learning and offering stackable qualifications with learning accumulated over an extended period. As learners seek to navigate their way through a new world of lifelong learning, help with the journey will be highly valued.

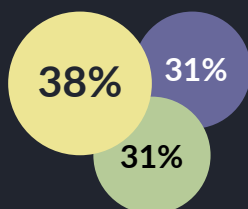


KEY ELEMENTS WHEN CONSIDERING A PROVIDER OF LIFELONG AND EXECUTIVE EDUCATION

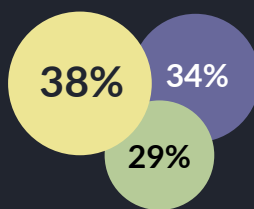
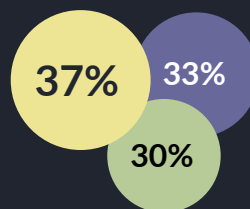
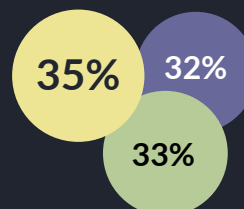
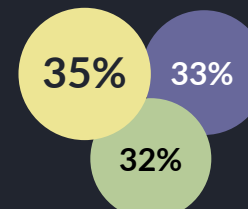
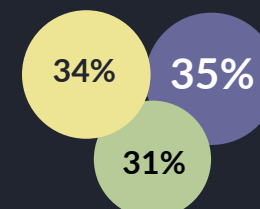
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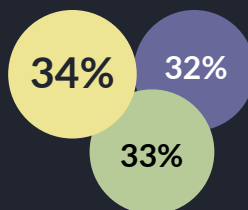
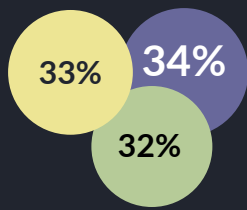
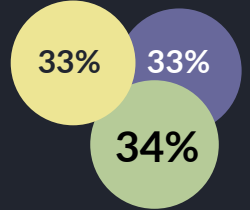
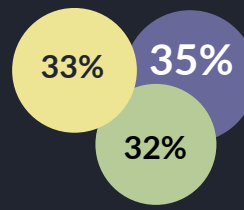
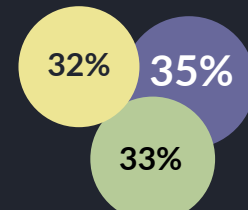
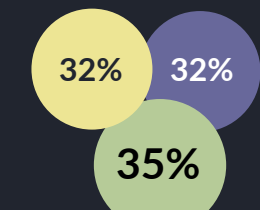
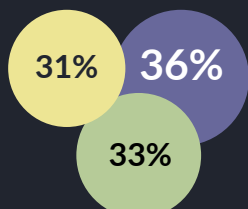
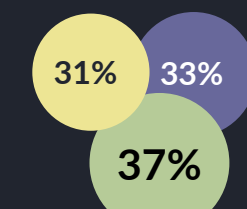
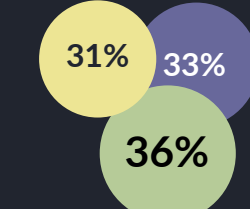
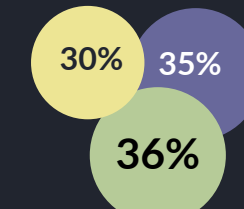
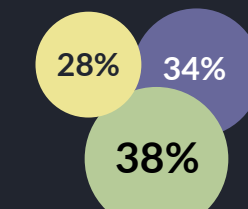
3

PROVIDES SUPPORT TO
DEVELOP MY CAREER

IS HIGHLY RANKED

OFFERS GOOD VALUE
COURSESHAS INTERNATIONALLY
RECOGNISED ACCREDITATION
FOR ITS COURSESPROVIDES GOOD
CUSTOMER SERVICEALLOWS ME TO PERSONALISE MY
LEARNING BY CHOOSING CONTENT
RELEVANT TO MY NEEDS

HAS A GLOBAL FOCUS

HAS A STRONG BRAND
REPUTATIONIS RECOGNISED FOR ITS
QUALITY BY LEADING
EMPLOYERSHAS A FOCUS ON SOCIAL
RESPONSIBILITYALLOWS ME TO PERSONALISE
MY LEARNING WITH
FLEXIBLE DELIVERY
FORMATSOFFERS A CULTURE OF
ENTERPRISECHALLENGES WORLD VIEWS
BY COMBINING INNOVATIVE
AND CRITICAL THINKINGDEVELOPS STRONG
NETWORKS AMONG ITS
LEARNERSOFFERS THE LATEST
UP TO DATE TOPICSEMBRACES DIGITAL
DELIVERY OF LEARNINGATTRACTS PEOPLE IN
A SIMILAR ROLE AND
SENIORITY AS MYSELF

The AI generation

If online learning was the focus of our previous report on the future of lifelong and executive education, then artificial intelligence is the inescapable aspect of the latest study. Discussion, debate and the use of artificial intelligence is everywhere in higher education at present and is likely to have a growing impact on the future of lifelong and executive education.

The impact of technology on learning and development is already significant, but AI may move things on further and faster than before. If nothing else, AI will be a tool for creating learning content and to potentially personalise courses to individual needs.

AI offers opportunities to drive greater impact in learning and development for employers and their staff. Learning experience platforms will help build individual journeys for learners, enabling them to make the most of study opportunities and to put together courses that best meet their career needs at any particular time.

DISCUSSION,
DEBATE AND THE
USE OF ARTIFICIAL
INTELLIGENCE
IS EVERYWHERE
IN HIGHER
EDUCATION AT
PRESENT



It might appear that AI is a win-win situation for employers seeking to build the skills and knowledge of their staff, but not everything may be straightforward. A lack of knowledge about staff and their current skills, AI resources directed elsewhere in an organisation rather than to learning and development and an inability of AI to capture the creativeness needed in good quality instructional design may hinder the value derived from AI in lifelong and executive education.

Both employers and learners were asked for their views on a series of statements relating to AI and learning. Among employers:

- 78% agree that AI-generated content is increasingly likely to be used in learning and development for their staff
- 78% agree that AI tools will help them maximise the impact of learning and development for their staff
- 74% agree that AI-powered learning experience platforms will help personalise the learning experience for their staff.

There is a sense of inevitability that AI will somehow become an integral part of the learning and development that employers provide for staff. However, the implementation of AI in learning and development may not be straightforward. Among employers:

- 64% agree that the use of AI in their organisation is focused on activities other than learning and development
- 59% agree that AI can't replace the creativity required in good quality instructional design
- 57% agree that their organisation lacks the data on employee skills and corporate needs to benefit from AI in their learning and development

To make the most of AI in their learning and development provision, employers need to think about it in the context of their wider development strategy. Employers need to be clear about the resources required to introduce AI effectively, the impact they are seeking and the outcomes they want for their staff and business.



78%

AGREE THAT AI GENERATED
CONTENT IS INCREASINGLY LIKELY
TO BE USED IN LEARNING AND
DEVELOPMENT FOR THEIR STAFF

Among learners, there are also mixed messages about the role of AI in their development and learning:

- 74% agree that they expect to use AI-generated content in their learning and development
- 76% agree that they expect to use AI tools to help them maximise the impact of learning and development
- 71% agree that they expect to use AI-powered learning experience platforms to personalise their studies (e.g. creating study materials for me or providing instant feedback on assignments).

However, there are again obstacles to meeting all these goals, especially around sophistication and creativity. Among learners:

- 61% agree that AI can't replace the creativity required in good quality instructional design
- 76% agree they want AI-generated educational content to be clearly labelled as such
- 54% agree that AI is not yet sophisticated enough to provide valuable support to their learning and development.

While there may be barriers to AI implementation in learning and development today, there are clear expectations about its future impact.

VIEWS OF EMPLOYERS ON THE USE OF ARTIFICIAL INTELLIGENCE IN LEARNING AND DEVELOPMENT



VIEWS OF INDIVIDUALS ON THE USE OF ARTIFICIAL INTELLIGENCE IN LEARNING AND DEVELOPMENT



Conclusions

1 A flexible future

Whether employer or learner, the message from the research is the need to be flexible. Employers want solutions that can meet their particular needs, perhaps by drawing content from different providers. Learners want solutions that fit their situation, whether that's face-to-face, blended or online, studying at their own pace or building a network with others.

2 The power of brand

What makes a powerful learning brand? Of course, marketing can build awareness, but ultimately the experience of learning and the outcome will be key. When learning can be delivered by a provider from the other side of the world rather than just round the corner, brand will be increasingly important when it comes to establishing trust and ensuring value.

3 The diversity of qualifications

Degrees aren't about to disappear, but the diversity of qualifications is likely to grow. Everything from certificates of completion to digital badges and CPD to professional credentials will be part of the qualifications landscape. Perhaps there could be a term that covers all of them – microcredentials, maybe!

4 Be quick, be impactful

It's not just about flexibility. Learning often needs to be delivered speedily, providing rapid career impact and adding skills or knowledge that an employer needs to take their business forward. Providers that can demonstrate the impact of their courses for both individuals and organisations will be popular. Lengthy linear learning may be sought less, but a hop, skip and a jump, moving quickly from one piece of learning to another, and maybe in different directions, is increasingly a preferred approach.

5 It's not all about AI

AI seems to be part of every conversation today. Learning and development are no different. Whether it's learning about AI or using AI to deliver and support learning, AI will be part of the future. However, there's more to technology than AI, with learners interested in a host of different tech topics and keen to use a variety of technologies in different ways to support their learning.

About the authors

At CarringtonCrisp we work with universities and business schools to offer imaginative approaches to your ever-changing world, using data and creativity to drive analysis, insight and practical solutions.

We are pioneers when it comes to market insights about business education. Our long-standing, regular reports have become a blueprint for schools who want to manage change using data to drive understanding of their key audiences. Our consulting, creative and research services provide the tools to help institutions define their offer and stand out from the crowd.

We help universities and business schools to change. Higher education doesn't need more of the same, it needs better, original and inspiring. We work with universities and business schools to build on the power of imagination, helping them grow in a highly competitive and crowded international marketplace.

Since CarringtonCrisp was founded in 2004, we have worked with more than 200 universities and business schools in 40 countries to build their future.





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