

DEMOS

THE LEARNING CURVE

HOW THE UK IS HARNESSING
THE POTENTIAL OF ONLINE
LEARNING

REPORT SUMMARY

FEBRUARY 2020

DEMOS

Demos is a champion of people, ideas and democracy. We bring people together. We bridge divides. We listen and we understand. We are practical about the problems we face, but endlessly optimistic and ambitious about our capacity, together, to overcome them.

At a crossroads in Britain's history, we need ideas for renewal, reconnection and the restoration of hope. Challenges from populism to climate change remain unsolved, and a technological revolution dawns, but the centre of politics has been intellectually paralysed. Demos will change that. We can counter the impossible promises of the political extremes, and challenge despair – by bringing to life an aspirational narrative about the future of Britain that is rooted in the hopes and ambitions of people from across our country.

Demos is an independent, educational charity, registered in England and Wales. (Charity Registration no. 1042046)

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This report was researched and written by:

Ben Glover
Rose Lasko-Skinner
Kitty Ussher
Harry Carr
Asli Atay
Elliot Jones

Designed by:
Izzy Little

THIS PROJECT WAS SUPPORTED BY:



LET'S START WITH THE OBVIOUS: THE INTERNET HAS CHANGED EVERYTHING.

Online learning - in the hands of the British people - proves to be one of the **most dynamic forces** in the country

10% of the UK economy can be linked to the effects of online learning

77% of people who learn online say it's improved their mental health

But while endless attention has been paid to how it's changed the way we talk, travel and fall in love, one of its most spectacular transformations is rarely considered: the way the internet has changed how we learn. Yet online learning - in the hands of the British people - proves to be one of the most dynamic forces in the country. It's providing an invisible boon to our economy, improving our wellbeing and giving us lifelong opportunities to learn, whatever, whenever and wherever we want. Alongside all of the benefits comes a challenge: our next learning curve as a nation needs to be how we ensure that those opportunities are available to everyone, and how we make the most of them.

This report is the most comprehensive of its kind on online learning in the UK to date. The results bring into sharp focus the transformative effect the internet has had on the lives of learners – from the 10 per cent of the UK economy that can be linked to the effects of online learning for work, to the 77 per cent of people who say it's improved their mental health.

But tools are just tools without humans to bring them to life, and **people are at the heart** of this transformation

The technology's there: smartphones, search engines, social media - we have endless information at our fingertips. But tools are just tools without humans to bring them to life, and people are at the heart of this transformation - the internet is empowering us to work better, even live better, but individuals are the true driving force.

It's clear from this report that online learning has a fundamental role to play in powering the productivity and happiness of the nation. That's why in this report we set out a new policy agenda for the 2020s, focusing on the role that the internet can play in building a nation of lifelong learners.

But what exactly counts as online learning?

In line with definitions identified through a comprehensive evidence review we define online learning as any learning that:

(a) Is reliant on the internet, either in a transactional (e.g. downloading a PDF) or participatory fashion (e.g. an interactive class)

(b) Improves skills for wellbeing, personal, educational or economic purposes

What exactly counts as online learning?

This reflects the consensus that learning is best understood in terms of outcomes as opposed to processes or intentions. As a result, our definition of online learning encompasses a broad range of different types of learning, from informal learning to formal learning.

To explore its impact, we asked 20,000 people across the country for their experiences of learning online, based around three main questions:

**A poll of
20,000 people
from across
Britain**

**1.
WHO IS
LEARNING
ONLINE?**

**2.
HOW ARE
PEOPLE
LEARNING
ONLINE?**

**3.
WHAT IMPACT
IS ONLINE
LEARNING
HAVING ON THE
ECONOMY AND
SOCIETY?**

This helped to give us a complete picture of exactly how the British public are learning online today. We also conducted a series of interviews with members of the public and undertook economic modelling to inform our understanding.

Here's what we found.

KEY FINDINGS

To start with, online learning is boosting the UK economy - in a big way. Two-thirds of those who use the internet to learn new things for work say that doing so has helped them do their job more efficiently, providing new evidence on the link between everyday workplace learning and economic productivity; 20 million people in Britain feel that online learning has, at some stage, contributed to them doing their job more efficiently. Maximising the impact of everyday work-related online learning is therefore an important part of the answer of how to raise economic productivity in Britain.

Online learning is boosting the UK economy - **IN A BIG WAY**

20 million people in Britain feel that online learning has contributed to them doing their job more efficiently



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The more you learn, the more you earn

And, linked to this, our research also shows that the more you learn, the more you earn. Over one in five of the UK working population has used internet-based learning to help raise their pay. Of these, the median pay rise is £2 per hour, equivalent to £3,640 per year for a 35-hour week. Using these results we estimate that around 10 per cent of the total economic output in the UK today is linked to the effects of online learning for work.

Higher earners, people in higher social grades and people with higher educational qualifications are more likely to learn online, more likely to feel it made them better at their jobs, and more likely to convert that into higher pay. Women are less likely to convert learning into higher pay, while young people and Londoners are more likely to.

We also found that online learning is lifelong - and even though rates vary by age, older people are still more likely to learn online than not. A total of 68 per cent of 18-24 year-olds learn new things online at least once every week, falling in each age band through to 57 per cent of those aged 60 and over. Similarly, just five per cent of 18-24s never use the internet to learn, compared with 14 per cent of those aged 60+.

Far from the stereotypes, it's clear that the majority of older people are still frequently learning using the internet.

Interestingly, it's also clear that people are learning online all the time - but they often don't realise it. The plurality of Britons say they don't learn as often as they would like, and many say 'their days of learning are behind them'. But the clear majority - including those who worry they're not learning enough or learning is no longer for them - are frequently doing so, online. Younger people, professionals and men do more than average, but across every demographic group more people are learning online than aren't.

Rates vary by age, but older people are still **more likely to learn online than not**

57% of those aged 60 or over learn online at least once a week

Even those who worry they're not learning enough or learning is no longer for them - are frequently doing so, **online**



58% of people learning work-related skills online do so off their own bat

We're a nation of self-starters. 58 per cent of people learning work-related skills online do so off their own bat - 36 per cent do so independently of their employer, 17 per cent as their own idea but supported by their employer, and 11 per cent say it was their own idea and they are self-employed. Just under one in five (18%) say their employer suggested or required it and five per cent say a client suggested or required it; a further 17 per cent did so to retrain to change careers, either because they wanted to (10%), or because they had to (seven per cent).

We also found that community is key, particularly for young learners. More than a third of 18-24 year-olds (35%) learn new skills at work by discussing them with other people online, for example on social media, compared with 23 per cent overall - making it their third most used tool, behind search engines and videos, and above written guides or information.





The technology supporting online learning is developing at pace - but **search engines reign supreme**

The tendency of younger age groups to learn through discussion and community-building can also be seen in trends around content creation. Just over one in five Britons (22%) say they have created learning materials for others to use online - and among 18-24 year-olds almost half have done so (48%).

It's also evident that search engines reign supreme, across all age groups. While we found that the technology supporting online learning is developing at pace, most people who learn online do so using search engines and video. Younger people tend to use a wider range of tools to learn online, for example using social media platforms for their learning discussions.

Crucially, online learning is also improving our wellbeing. The benefits of learning online are not only financial - more than three quarters of people who learn online (77%) say it has been beneficial to their mental health. This result is remarkably consistent across every demographic - regardless of what you learn, whether it is for work or a hobby, and whether or not you received a pay rise or got a new job as a result, learning in itself is perceived as bringing similar mental health benefits.

More than 3/4 of people who learn online say it has been **beneficial to their mental health**



The most searched skill in Britain is how to cook

And we're cooking up some other great skills too. The most searched skill on the internet in Britain is how to cook, with more than a third of online learners (36%) looking to hone their kitchen know-how. Second is DIY (29%), followed by gardening (24%) and maintaining/fixing things (23%).

Perhaps surprisingly, 18-24 year-olds are significantly more likely than average to be interested in jam-making. People aged 25-39 are more into building and making things and 40-59 year-olds are more likely to search for DIY tips, while those aged 60 and over prefer bird-watching.

RECOMMENDATIONS

A POLICY AGENDA FOR ONLINE LEARNING IN THE 2020s

In one sense, the fact that there are clear positive benefits for individuals, businesses and wider society from lifelong learning - or the acquisition of knowledge and skills - is nothing new. What our research has demonstrated, however, is that it is now completely normal to use the internet and web-based technologies to pursue this learning.

For the first time, we have a sense of the scale of internet use for this purpose, and the effect it is already having on individuals, the economy and society at large. We know that, far from a nation of technophobes whose studying days are behind them, Britons are curious, proactive and enthusiastically embracing opportunities to learn online.

This insight allows us to better understand how to increase skills in the economy and individual wellbeing through the prism of the internet and its capacity to open up new learning opportunities not linked to geography or circumstances.

This chapter draws on our analysis to set out a series of policy recommendations to ensure that we fully realise the potential benefits of online learning. Our recommendations primarily aim to increase the quantity and impact of online learning.

Improving workplace access to learning

Our research also finds that online learning can significantly improve workplace efficiency, with two-thirds (67%) of those who use the internet to learn new things for work saying that doing so has helped them do their job more efficiently; a similar proportion say it has helped them do their job with greater skill and expertise (66%). This suggests online learning brings significant gains to the employee, the employer and the wider economy.

However, many workers may not have the time to complete learning, be it online or offline. Employees currently have the right to request unpaid leave for training, subject to certain conditions, but low income workers may be unable to take unpaid leave for this purpose. Furthermore, those who have limited hours available due to caring commitments may be unable to find the time outside hours to do it. This creates a poverty trap for part-time workers on low incomes, unable to undertake the training they need to prove they have greater earning potential. The government should therefore legislate for all employees to enjoy five paid days of learning leave.

To prevent wasted opportunities and abuse of the system, the legislation should set out a prescribed process for agreement between employer and employee (similar to the process around the right to request flexible working) as to the nature and purpose of that training. This could be linked directly to the needs of the organisation or explicitly to the career ambitions of the individual even if those are different.

Furthermore, the government should consider whether this right should be subject to the same conditions currently attached to the right to request unpaid study leave, at least initially. For example, requiring that the individual must work in an organisation with more than 250 employees, ensuring that small and medium-sized enterprises are not adversely affected by the change until its impact can be fully assessed.

Recommendation 1

The government should consult on updating the Employment Rights Act 1996 to give certain employees the right to five days paid learning leave, with a process laid down in regulation as to how the content of that learning is to be decided.

This policy change would send a clear signal that the government is committed to the challenges of the 2020s, in particular the need for workers to be continually upskilling and reskilling throughout their career. In addition, if this policy led to more training it would likely boost productivity, given we know that training is a boon for productivity.

Skills and pay progression

Our research finds that people often feel that they do not need to learn new skills to help them at work: this was the most popular reason why people had not undertaken online learning for work purposes. This is a widespread issue in the UK economy, particularly in low-pay sectors.

Modular learning schemes that are officially recognised by a sector-specific accreditation body could help address this. If pay were linked to learning progression, workers would be given a strong incentive to upskill. It would also make it easier for employers to understand which training their employees should undertake to maximise their five days annual learning leave. These types of accredited learning schemes already exist in some sectors, but where they do not the government should work with employers and trade unions to establish new bodies to perform this function.

There is a particular need for this in large but lower paid sectors such as retail, hospitality and care where recent funding cuts for sector skills councils have restricted formal progression routes outside of apprenticeships, which could be viewed as inappropriate for people already familiar with the sector.

Recommendation 2

The government should establish joint working groups with industry to set up new accreditation bodies to provide modular career progression routes for industry sectors that do not already have such bodies, prioritising lower pay industries.

Once such accredited learning points are defined, this will act as a spur to the market and individuals to produce appropriate online content designed to support people on their chosen career path; a possible model is the experience in Denmark where a new government requirement for teachers to reach degree standard has led to the development of online personalised learning paths to this level for individuals to pursue at their own pace (see annex 1).

Unleashing the democratising potential of online learning

Online learning has the potential to expand access to learning for those that may have previously been excluded. This means that online learners may today have equivalent skills to those educated at traditional institutions, such as universities. However, because employers often require a specific qualification, those without such qualifications may still be excluded from certain jobs or professions - even if their skills are of the same level as those acquiring from traditional education routes.

This not only reinforces existing social inequalities, it is also economically inefficient, given that it is almost certainly vastly cheaper to acquire skills by learning online than at, say, university. For these reasons our recommendations are designed to encourage employers to move towards skills-based hiring rather than a reliance on traditional qualifications.

However, we recognise that hiring processes are unlikely to change overnight and that in the meantime traditional qualifications will continue to have a high value in the labour market. That is why it is useful to consider how we open up access to universities and other degree-conferring institutions. One option is to allow anyone to sit a university's exam, for a fee, even if they have not formally enrolled at the institution. This would allow people who feel they are being held back in the labour market because either they lack a degree or the opportunity to take one to nevertheless demonstrate that they can operate at the required standard. This also has the added benefit of sharpening the development of online materials.

There are, of course, intangible advantages from undertaking a traditional undergraduate education - not least being able to signal that you were a high achiever at age 18 and capable of engaging in discussions with academic experts. But we still feel there is a benefit from being able to sit an accredited university finals exam at any stage of your life if it helps you achieve your ambitions, at a fee that covers simply the cost of arranging and marking the examination itself to the level that any undergraduate would experience.

Recommendation 3

Universities and professional bodies should consult on introducing 'open access exams' that would allow anyone to sit their exams, in usual exam conditions and marked at the same level, in order to gain the qualifications on offer and spur the development of appropriate online resources.

Taken together our recommendations would sharpen the potential of web-based technologies to increase economic productivity, personal wellbeing and greater social mobility through the use of online learning. The demand for learning would be increased by our proposals to allow paid time off for training and the creation of modular progression routes in the lowest paid industries, as well as further action to address digital exclusion. The supply of learning opportunities would be increased by new modular qualifications to support those routes, leading to more thought around how to curate appropriate free content and the opening up of degree qualifications. Taken together, our recommendations will further unlock the potential of the internet to provide what our economy and society needs.

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76 VINCENT SQUARE, LONDON, SW1P 2PD

T: 020 3878 3955

HELLO@DEMOS.CO.UK

WWW.DEMOS.CO.UK