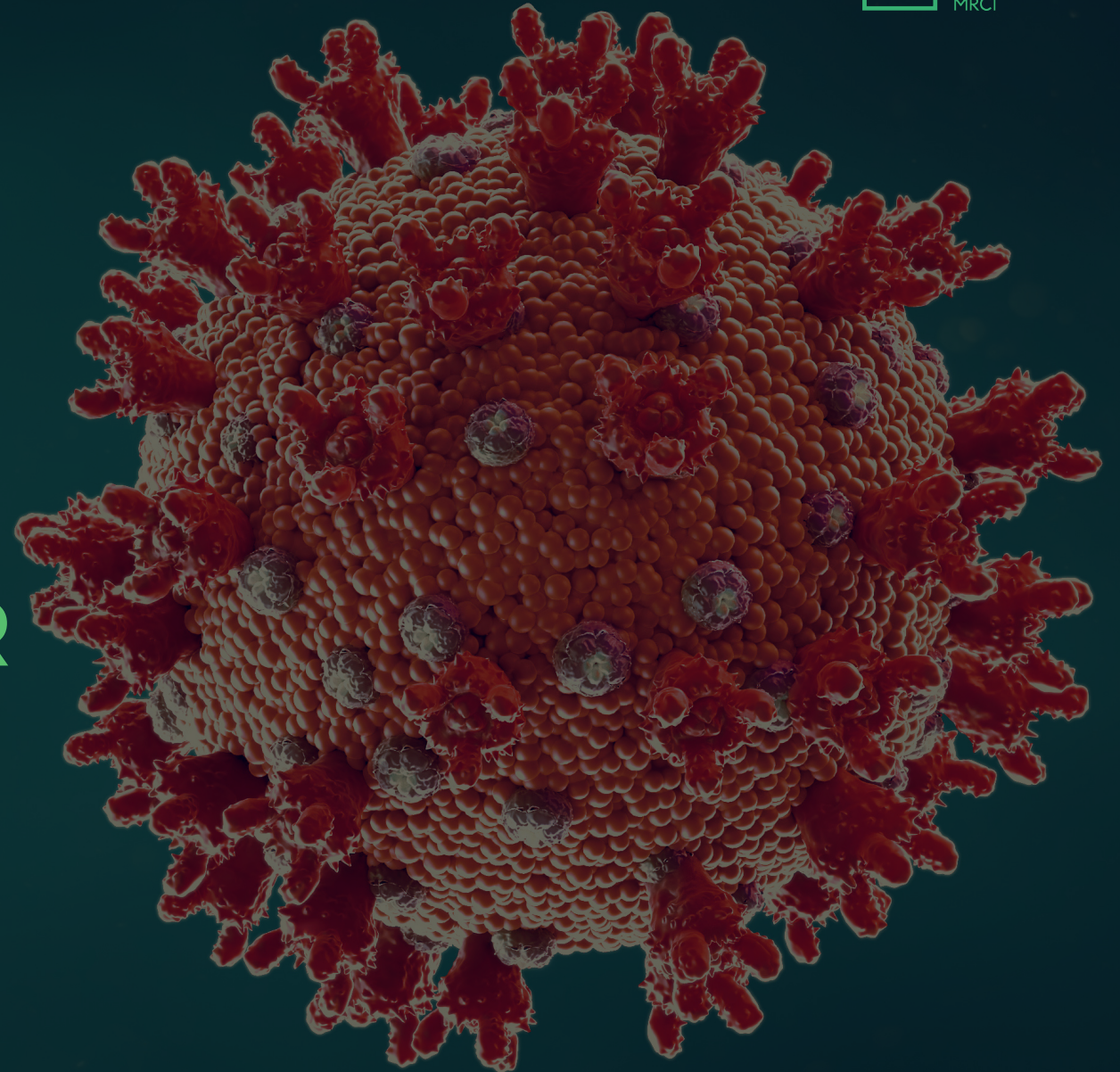




# GLOBAL CONSUMER SENTIMENT SURVEY

LEARNINGS ABOUT THE FUTURE OF ONLINE  
EDUCATION IN A POST COVID-19 WORLD

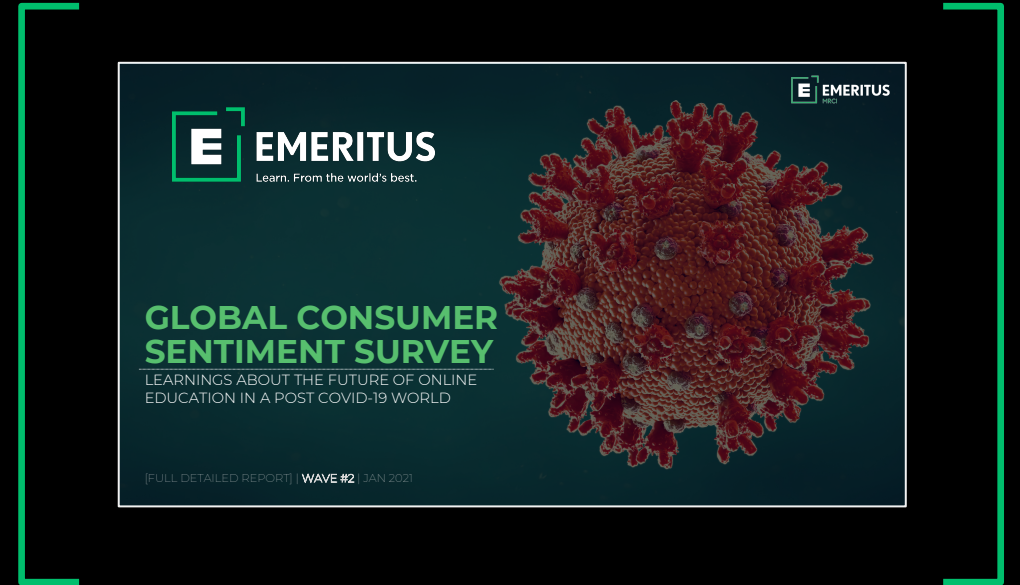




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- Project Specs
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# PROJECT SPECS

## Global Consumer Sentiment | Jan 2021

Data Collection, Target Audience and Sample

### DATA COLLECTION METHOD

Online questionnaire CASI on Qualtrics®

### INSTRUMENT

CASI – 10-minute survey

### DATA COLLECTION PERIOD

January 14<sup>th</sup> through January 24<sup>th</sup>, 2021

### SAMPLING METHOD

Stratified Random Sampling.  
Online panel managed by Qualtrics®.

### TARGET AUDIENCE

- Living in one of the regions of interest (detailed in table).
- Age between 21 and 65 years old.
- Complete High School (20%) + complete Higher Education (80%).
- Interested in pursuing further education in the next 12 months.

# SAMPLE DISTRIBUTION

COUNTRY/REGION	Sample	Weight <sup>1</sup>
<b>Brazil</b>	160	10%
<b>China</b>	160	10%
<b>France</b>	160	10%
<b>Germany</b>	160	10%
<b>India</b>	520	10%
<b>Latam<sup>2</sup></b>	168	10%
<b>Singapore</b>	160	10%
<b>United Arab Emirates</b>	160	10%
<b>United Kingdom</b>	174	10%
<b>United States of America</b>	310	10%
<b>GLOBAL</b>	<b>2,132</b>	-

<sup>1</sup>Weight was applied in order to all countries have the same representation.

<sup>2</sup>LATAM sample includes respondents from Argentina, Chile, Colombia, Mexico, and Peru, evenly distributed.

# KEY TAKEAWAYS



## LEARN MORE, SPEND MORE

Consistent with the learnings from 2020, overall, **interest in pursuing further education continues to increase** due to the current global events, and people believe their **personal spend with education will increase** in the near future.

Education is seen as a way to "**future-proofing**" against events similar to this one, but also as a gateway to **career advancement**. It is a matter of evolving and not just being safe in their job.

Financial matters caused by the pandemic and a focus in other priorities are the main reasons why interest has decreased for a smaller portion. The travel ban that prevents them from studying abroad also continues to be brought up.

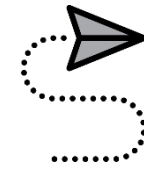


## ONLINE LEARNING IS (STILL) HERE TO STAY

Consistent with the results from 2020, **it is believed that online learning adoption is going to increase, not only in the short term – it is here to stay!** We can see that prejudice against online learning options is declining.

In the **short term**, fear of the disease, governmental restrictions and social-distancing measures put in place will make online learning the only option.

In the **long run**, based on their current experience with remote work and remote learning, people will get used to it and will appreciate its benefits. They are seeing that their quality of life can be improved by telecommuting in general.



## HYBRID OR ONLINE, FREE OR PAID

**Online learning consideration is high!** More than three-quarters of participants consider either a **hybrid or 100% online approach to education**.

Free offers are popular, but so are paid alternatives. **81% of those who consider a free option also consider a paid provider.**

**Shorter formats**, with short term outcomes, such as mini courses, short courses and bootcamps, are more often considered than longer formats.

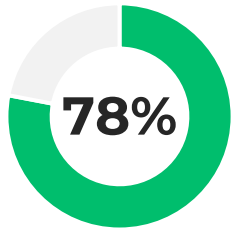
They also have **more time** now to dedicate to learning and improving skills, and **bite-sizing** learning might be a great way to start their journey!



## ONLINE EDUCATION TRENDS

# Online learning adoption is (still) here to stay!

How online learning adoption is expected to change in the near future

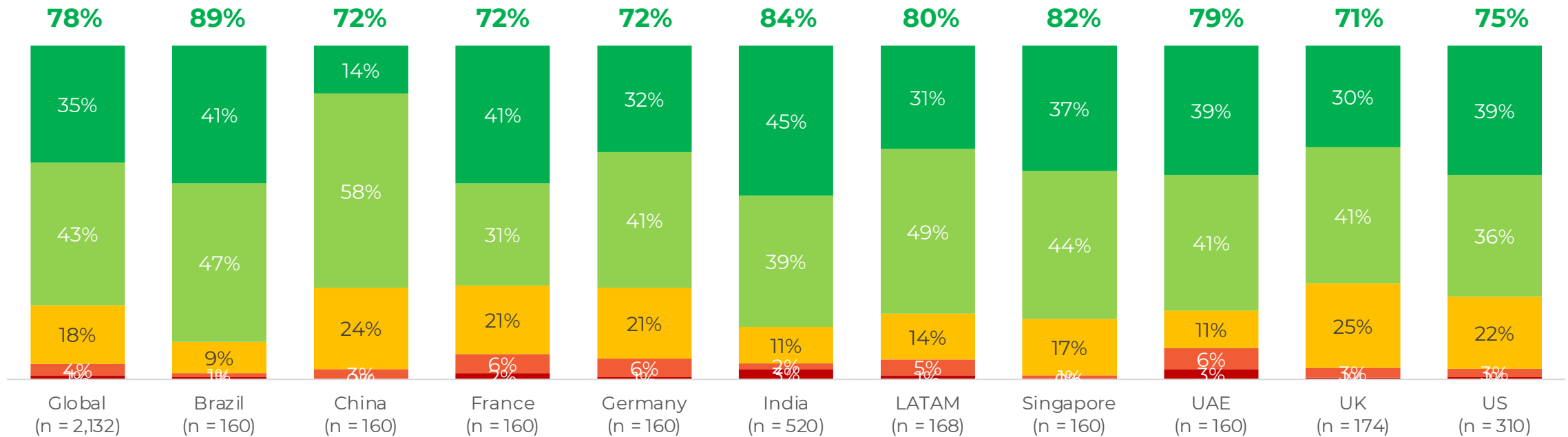


believe **online learning adoption will increase** in the near future

**Participants believe online learning adoption is going to increase in the near future.** Participants perceive that online learning allows more flexibility, convenience, and work-study-personal life balance. It is also perceived as a time-saving option, as well as more affordable. Due to the pandemic, more and more people experienced online education, making them more comfortable with the approach and reducing some of the prejudices related to the modality.

T2B<sup>1</sup>  
Top 2 Box

■ Significantly decreased ■ Decreased ■ Stayed the same ■ Increased ■ Significantly increased



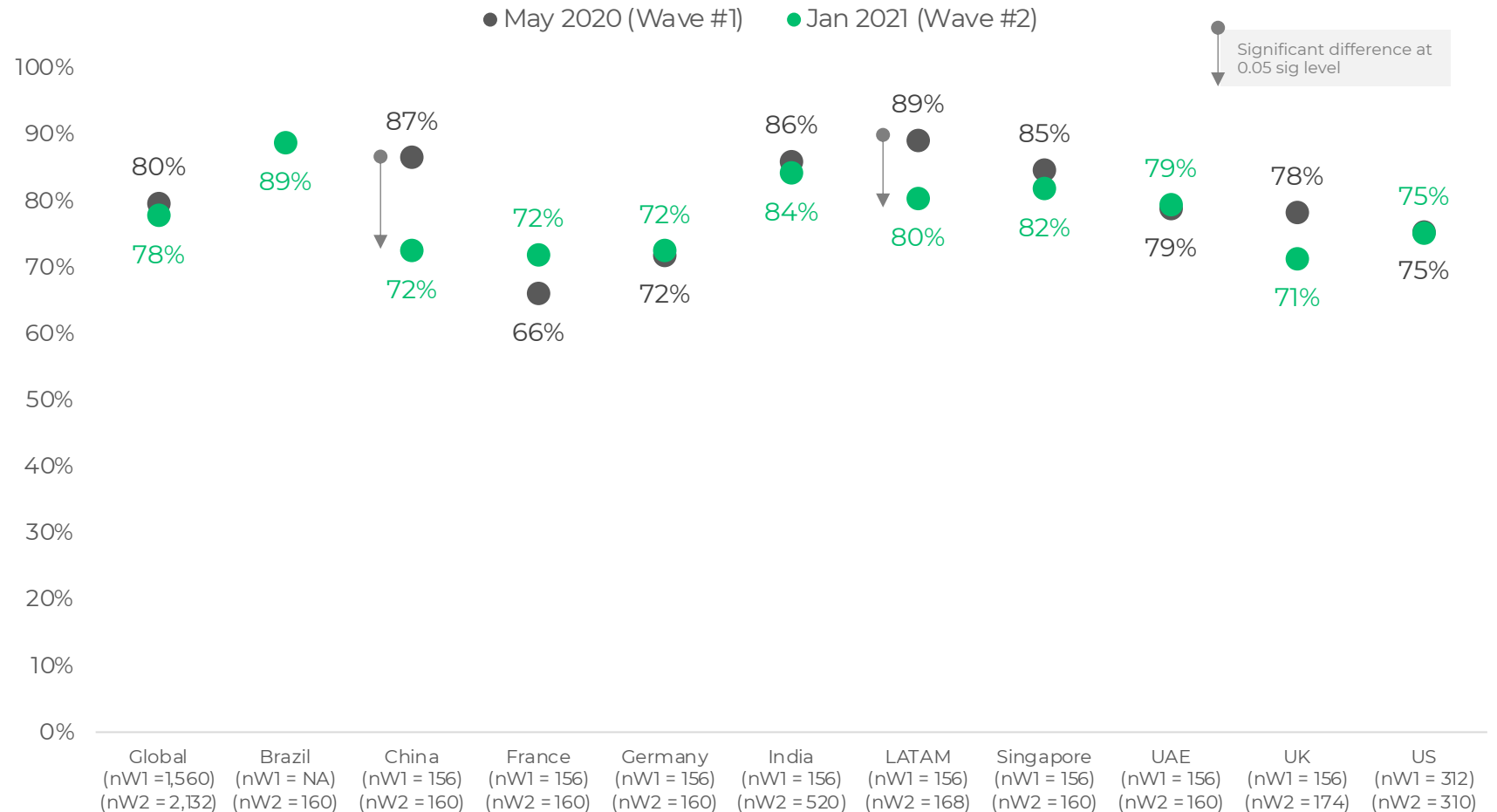
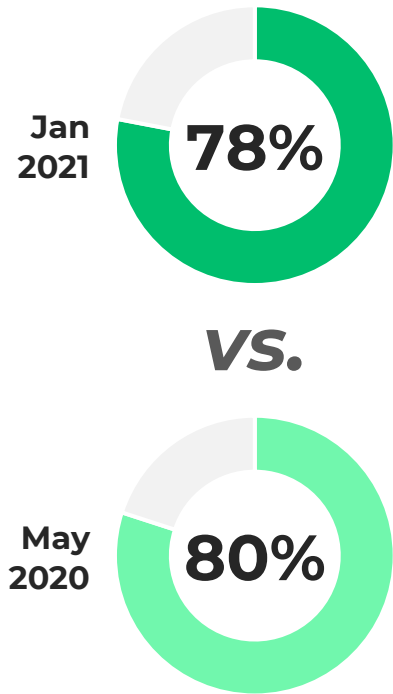
T2B sig. dif.

CHI, FRA,  
GER, UK, US

# Online learning adoption is (still) here to stay!

How online learning adoption is expected to change in the near future | **Wave #1 x Wave #2**

believe **online learning adoption will increase** in the near future  
T2B (Top 2 Box) Results<sup>1</sup>



Based on the current global developments, how do you expect online learning adoption to change in the near future? | <sup>1</sup> T2B results: 4 or 5 in a 5-point scale.

# Flexible, convenient, time-saving, affordable

Why online learning adoption will increase according to a majority of respondents

*Online learning offers the chance to achieve these goals while **balancing their jobs and schedules**. Online learners can develop their skills at their **own pace** and **keep records of their learning** for future reference.*

-- India

*Many institutions had to **adapt, create a structure** that in the past they did not think would be worth it. The **students**, too, **had to get used to it** and, certainly, **many started to prefer online classes**.*

-- Brazil

*Because we almost never have a university nearby and **travel time is lost time**, and, when you have a job and a family it is difficult to **accommodate the times**, an online **study is the most viable**.*

-- Mexico

*Due to the impact of the epidemic, many people have lost their original jobs, or the original jobs are not suitable for some people, and they need to be **re-adjusted to new occupation types**. We need to accept the new vocational training.*

-- China

*I believe online learning adoption will continue to increase as has **evolved quickly** in the past year and is a **more convenient and affordable way to learn**.*

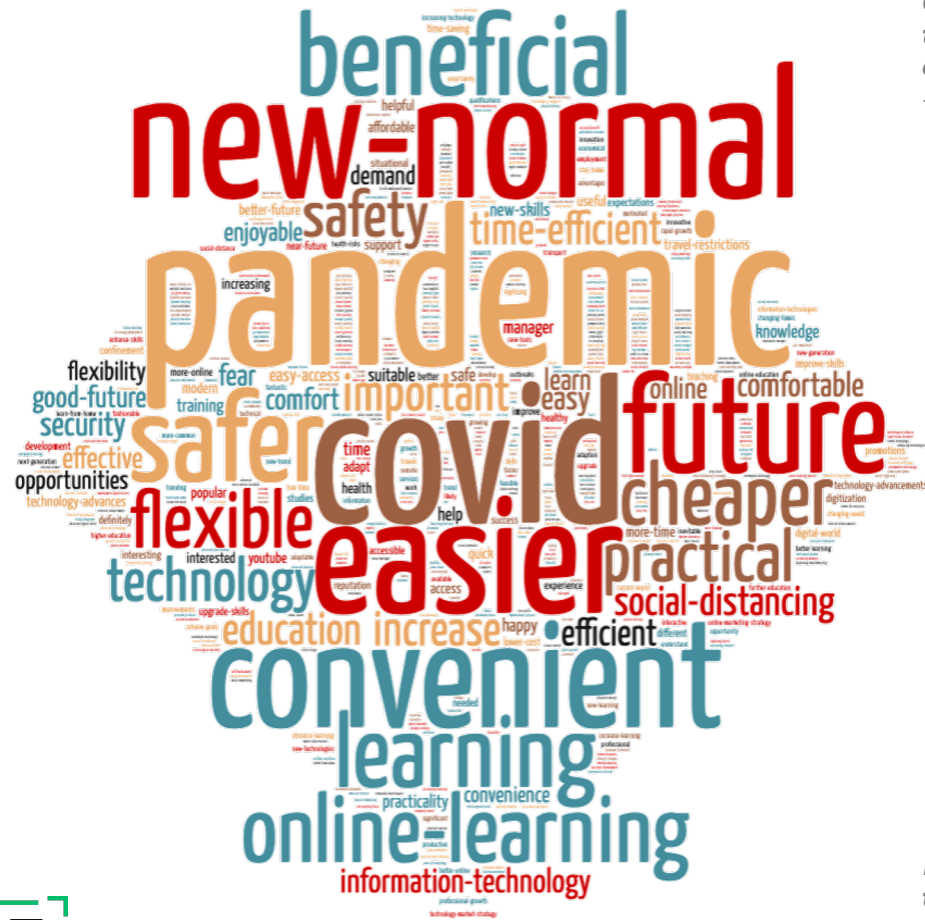
-- Singapore

*It certainly seems to be **the way forward**, especially as more people are learning and **working remotely**. It takes **travel time out to the equation** also, so adds greater **balance to the work/home situation**.*

-- United Kingdom

*It makes sense, learning online is fully acceptable way to learn for some students. **It's time to make the tools as effective, if not more affective than in class lectures**.*

-- United States







# There is still some discomfort with online learning

Why online learning adoption will decrease according to a small number of respondents



*I hope diminishes, because I believe that there are people like me who **do not feel comfortable with this approach.***  
 -- Mexico

*The **pressure of work and life** increased, **decreased income.***  
 -- United States

*No doubt the world has changed a lot in 2020 but **I believe the norm will return** and things will be better and offline classes will return.*  
 -- India

*Because **we don't need it when the pandemic is gone.***  
 -- Germany

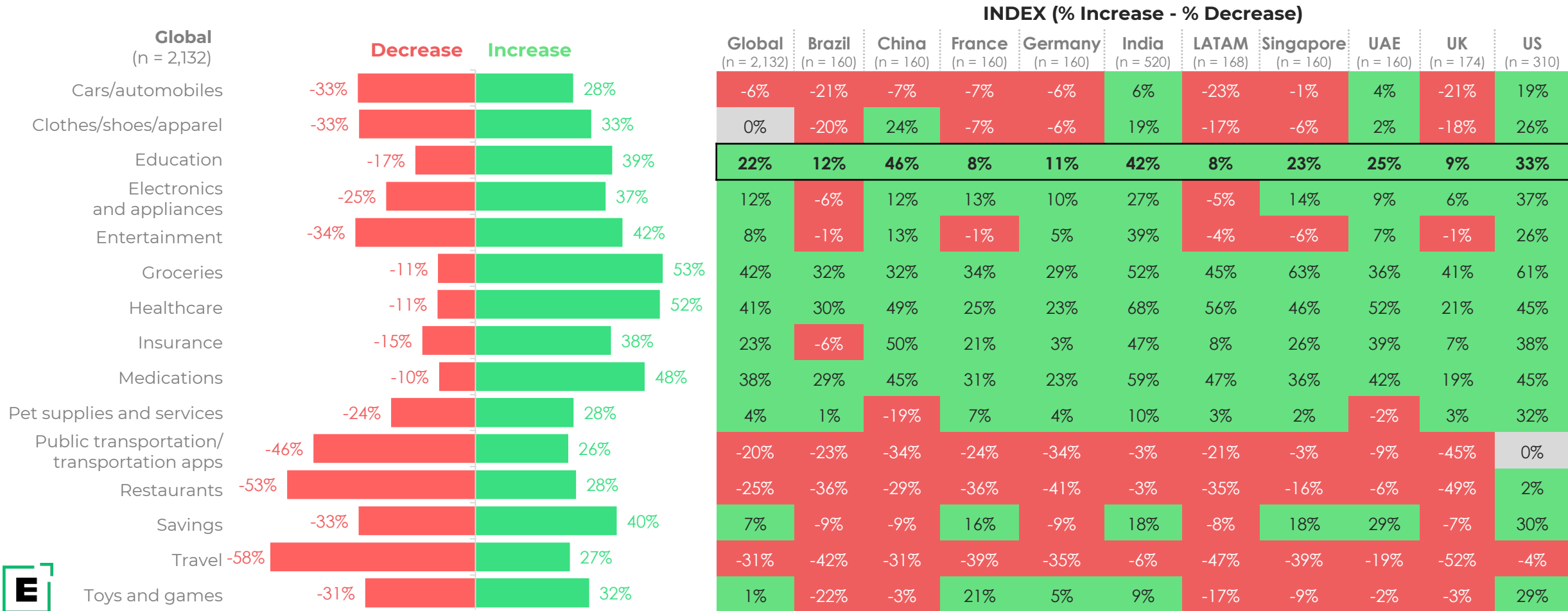
*With the **vaccine** virus will decrease.*  
 -- France



# Personal spend with education is expected to increase

Personal spend with the following categories, in the next 6 months, will...

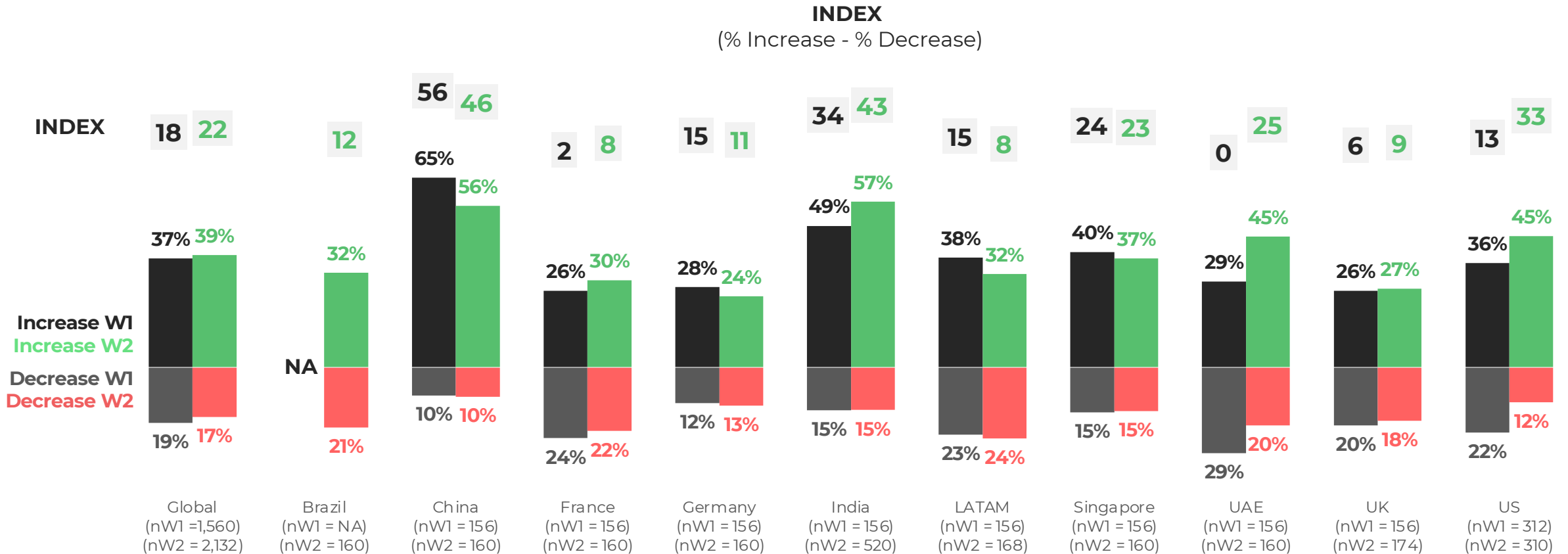
The 22% index is significantly high among categories, standing **behind only essential items** (e.g., groceries, healthcare, and medications).



Based on the current global developments (especially the COVID-19 pandemic), would you say that your personal spend with each of the following categories, in the next 6 months, will...

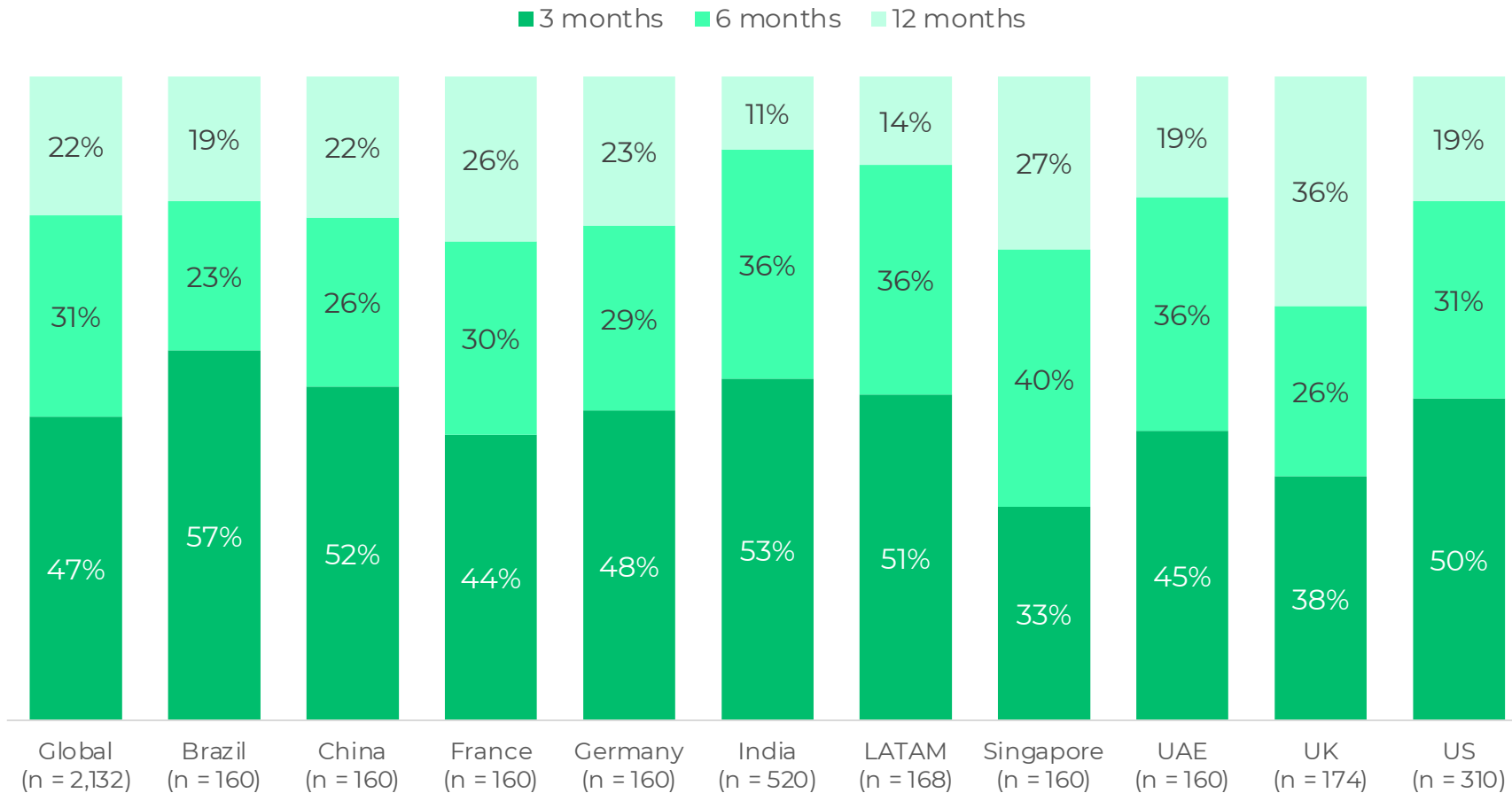
# Personal spend with education is expected to increase

Personal spend with the following categories, in the next 6 months, will... | Wave #1 x Wave #2



# 47% intend to pursue further education in the next 3m

Interest in pursuing further education/professional training within the next...



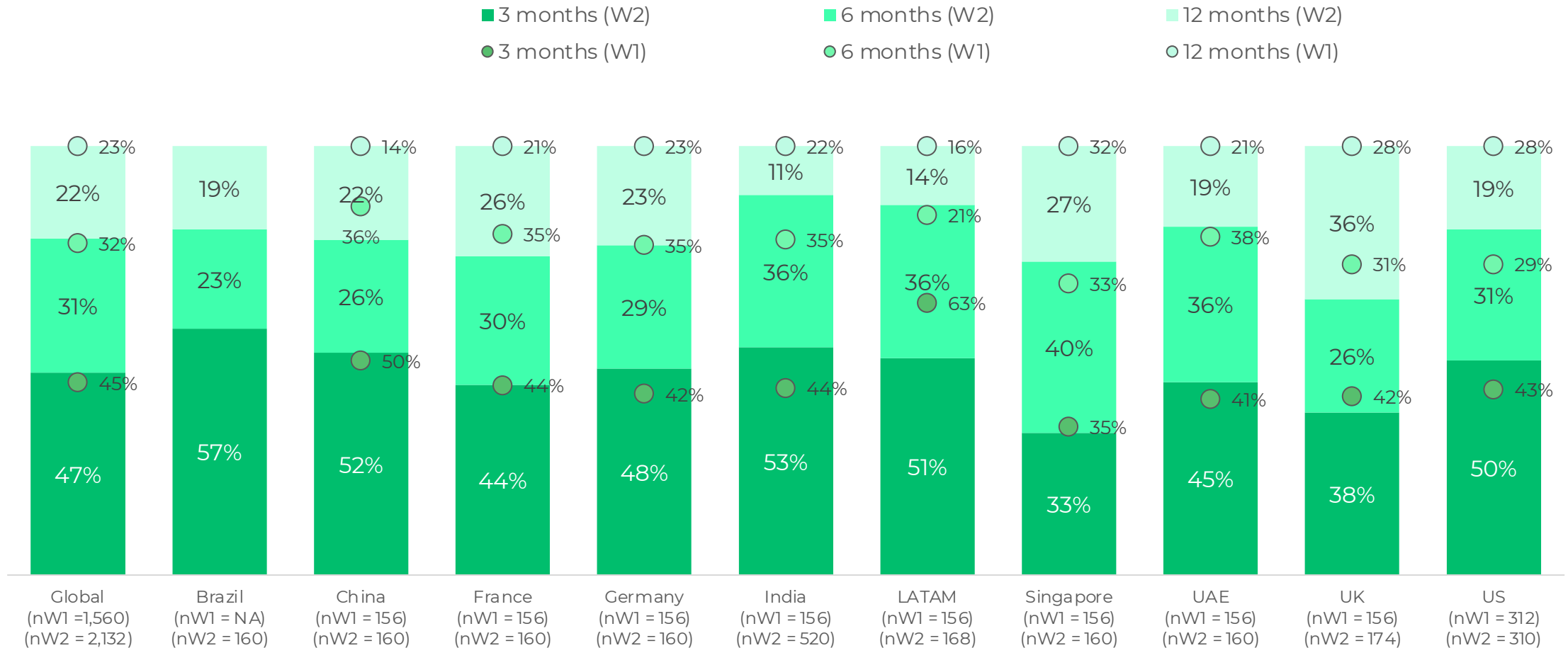
**Respondents are looking to pursue further education in the short term.**

Almost half of overall respondents has a 3-month timeframe in mind – this number is significantly higher in the Brazilian market: nearly two-thirds of respondents. Singaporean respondents are the ones with the longest timeframe in mind: a quarter will wait 12 months.



# 47% intend to pursue further education in the next 3m

Interest in pursuing further education/professional training within the next... | Wave #1 x Wave #2



# Career advancement is the main motivation

## Motivations to pursue further education

Career advancement is the main motivation to pursue further education: **upskilling, get a promotion, a salary increase, or even switch careers.** This is a big shift compared to the results from 2020, when further education was sought after to increase job safety.

*Benefits of Continuing Education Throughout Your Career: **Grow Your Income** with Continuing Education; Continuing Education Leads to **Better Networking**; Professional Development for **Better Job Opportunities**.; **Climb the Career Ladder** through Continuing Education; **Stay Sharp and Healthy** Inside and Outside the Office; Develop **New Professional Interests.***

-- India

*To achieve more in **networking & programming skills** as those are in demands always. **Covid-19 has tremendously boosted up the growth in these fields.***

-- Singapore

*(Education) helps people become better citizens, get **a better-paid job**, shows the difference between good and bad. Education shows us the **importance of hard work** and, at the same time, helps us **grow and develop**. A higher education allows you to **pursue a career that interests and inspires you**. When you have the **freedom to choose your career**, you're more likely to enjoy it. Higher job satisfaction also comes from **higher income, better employment benefits, and more advancement opportunities.***

-- India

*What motivates me is the **greater availability of time** during the pandemic, in addition to increasing my knowledge, and **obtaining better qualifications for the job market.***

-- Brazil

*I want to further my education but also **strengthen my abilities** so I can get into a position that will not only **earn me enough money** but **expand my scope.***

-- United States

***Promotion** to the senior management level in a consolidated and more merit and responsibility / freedom.*

-- Germany

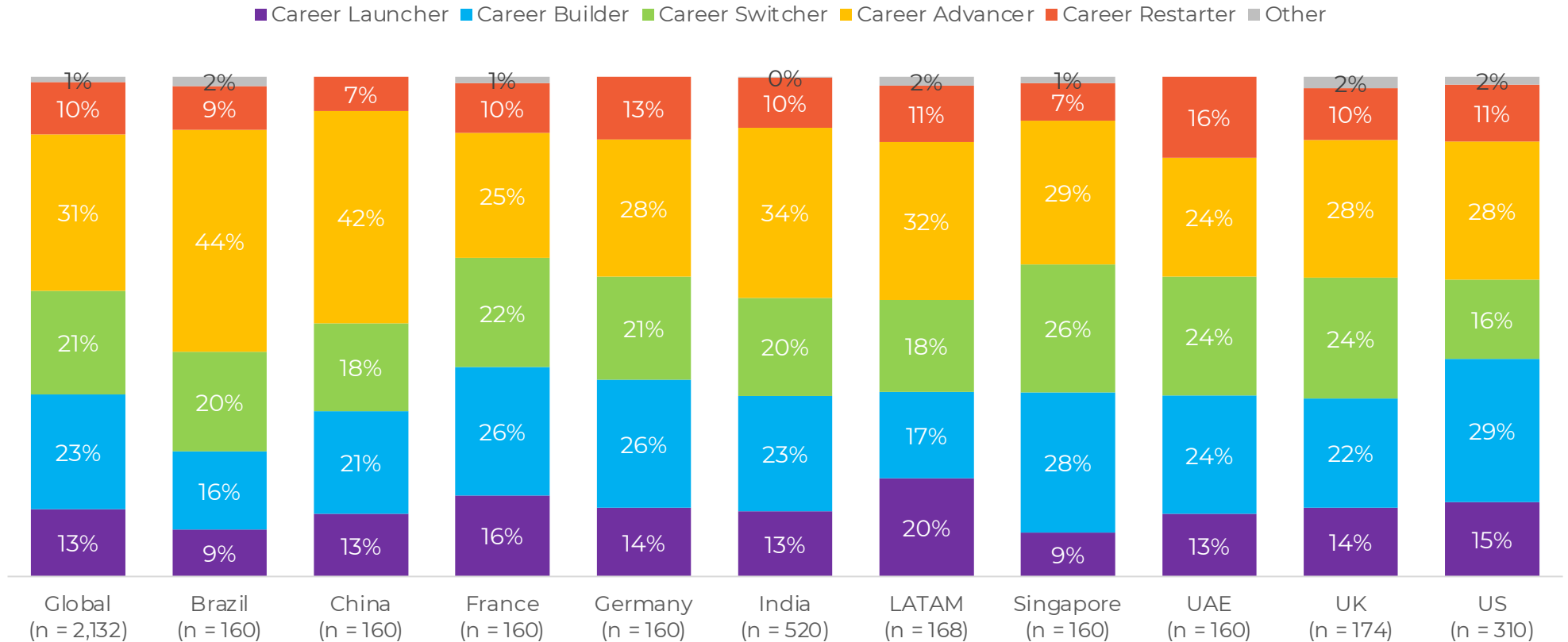


# 1/3 want to advance career in their current field

## Current career moment

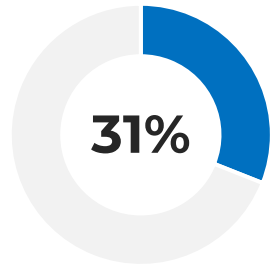
Overall, **a third of participants want to advance their career in their current field**; the percentage is even higher among respondents from Brazil (44%). Career builders and career switcher close the top 3 career moments.

<b>Career Launcher</b>	wanting to start a new career
<b>Career Builder</b>	ready to build upon existing skills (technical or non-technical)
<b>Career Switcher</b>	looking for new ways to expand opportunities
<b>Career Advancer</b>	advance career in your current field
<b>Career Restarter</b>	looking to re-enter the workforce after a break

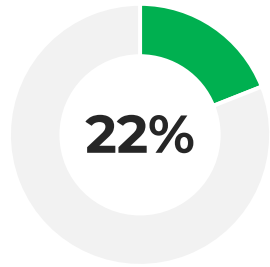


# High interest in hybrid or fully online learning

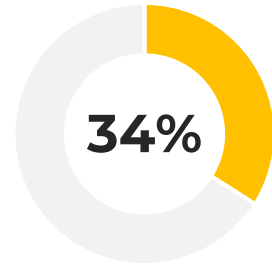
## Considered approaches to obtain further education



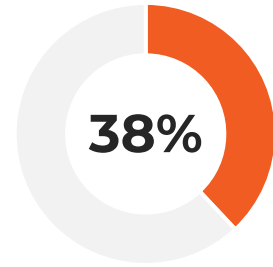
site-based, at nearby location



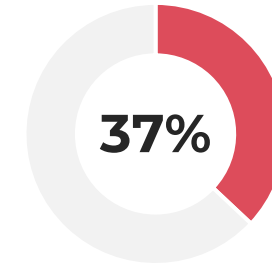
site-based, travel required



hybrid, mainly site-based



hybrid, mainly online

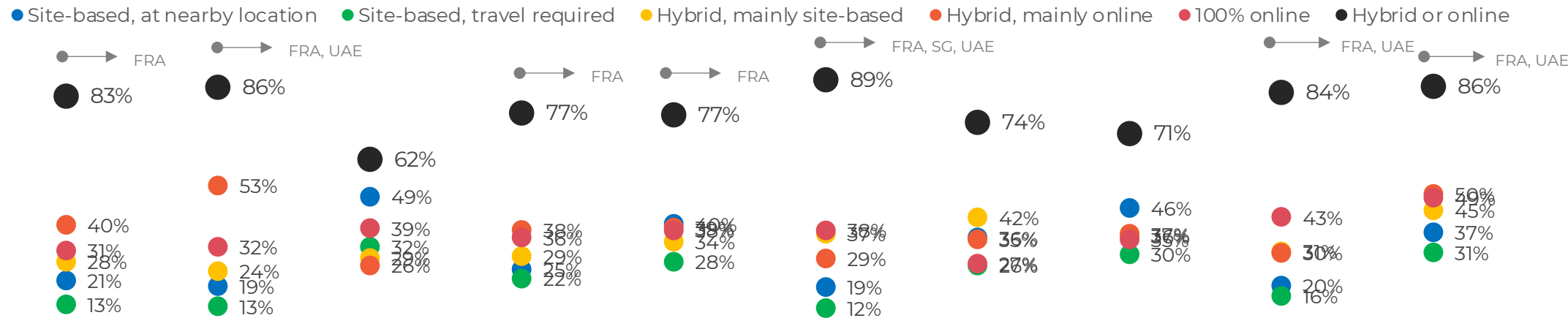


100% online

**79%**  
would consider either a hybrid or online approach

**Online learning consideration is high!** Nearly 8 in every 10 respondents would consider either a hybrid or 100% online approach. Close to half of those who consider a F2F approach to learning also consider either a hybrid or fully online approach as well. A significant increase in interest is perceived among participants from France and UAE in comparison to the 2020 study.

Significant difference at 0.05 sig level



Global (n = 2,132)

Brazil (n = 160)

China (n = 160)

France (n = 160)

Germany (n = 160)

India (n = 520)

LATAM (n = 168)

Singapore (n = 160)

UAE (n = 160)

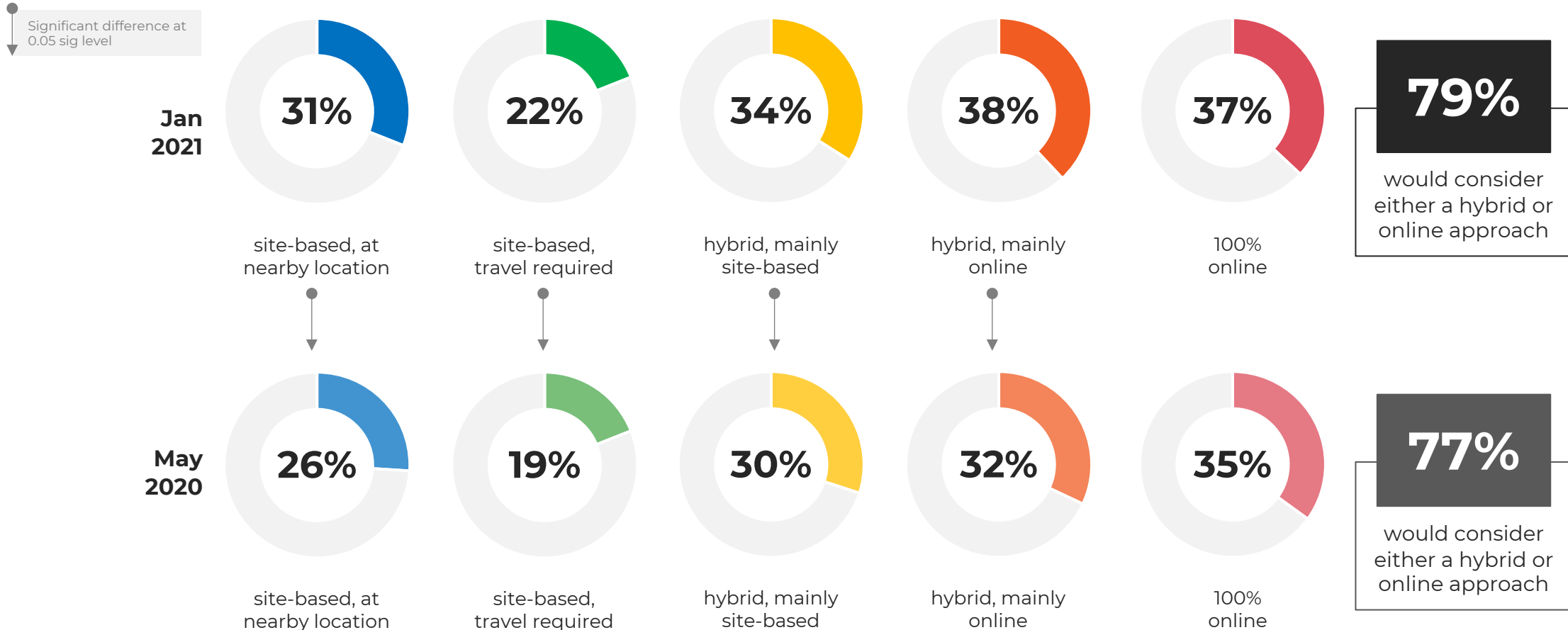
UK (n = 174)

US (n = 310)



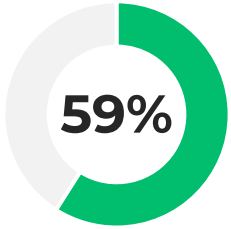
# High interest in hybrid or fully online learning

Considered approaches to obtain further education | Wave #1 x Wave #2



# Interest in pursuing further education is increasing!

How interest in pursuing further education has changed due to the current global developments

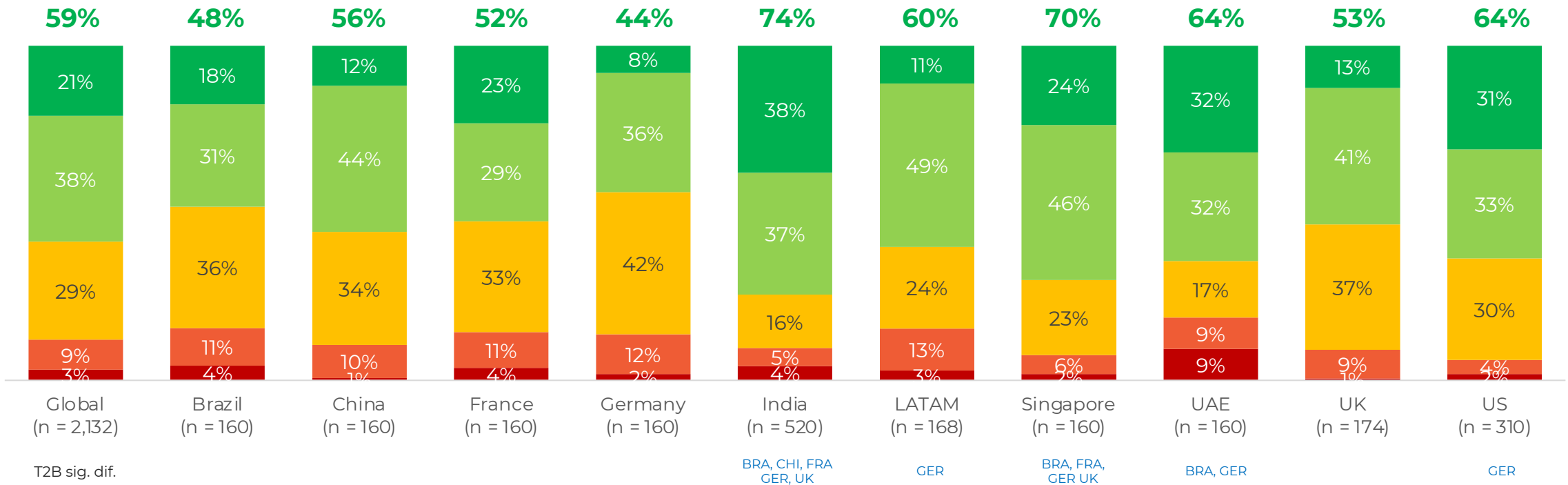


claim their interest in pursuing further education has **increased**

**Interest in pursuing further education through online learning is increasing!** Consistent with the findings from 2020, participants are looking for ways to 'future-proof' themselves and their careers, but the mentality has changed: even though several people still see further education as a safety measure to retain their jobs, we can see an increase in people who believe in education as a gateway to 'evolve' their career: promotions, salary increases, switch careers, etc.

■ Significantly decreased ■ Decreased ■ Stayed the same ■ Increased ■ Significantly increased

T2B<sup>1</sup>  
Top 2 Box



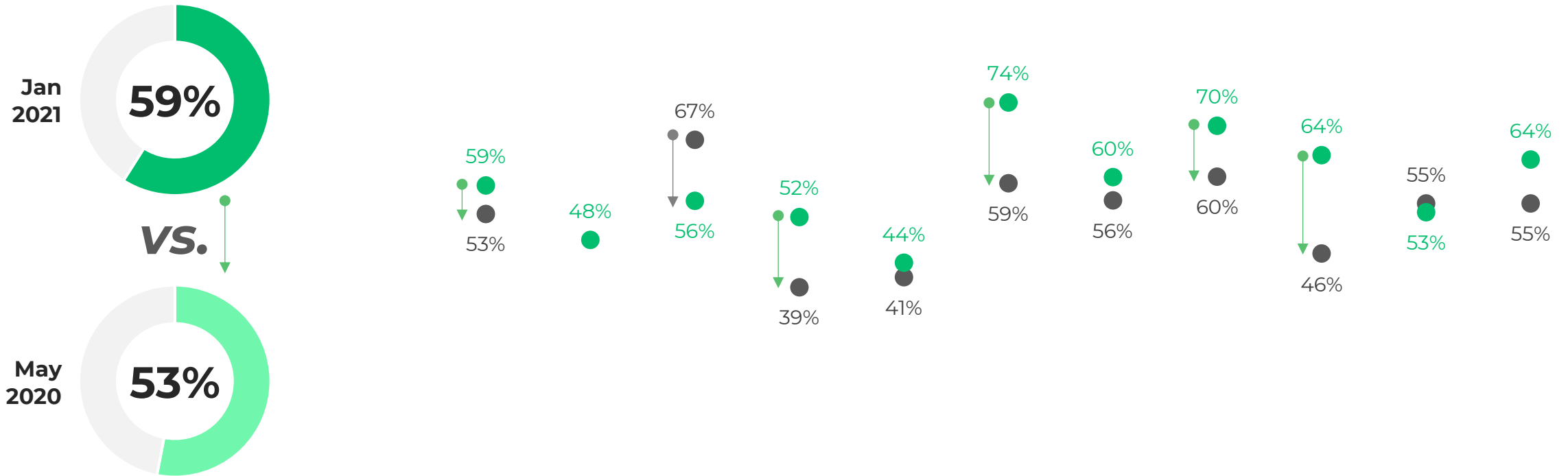
# Interest in pursuing further education is increasing!

How interest in pursuing further education has changed due to the current global developments | **W1 x W2**

claim their interest in pursuing further education has **increased**  
T2B (Top 2 Box) Results<sup>1</sup>

● May 2020 (Wave #1) ● Jan 2021 (Wave #2)

Significant difference at 0.05 sig level



Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
(nW1 = 1,560)	(nW1 = NA)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 156)	(nW1 = 312)
(nW2 = 2,132)	(nW2 = 160)	(nW2 = 160)	(nW2 = 160)	(nW2 = 160)	(nW2 = 520)	(nW2 = 168)	(nW2 = 160)	(nW2 = 160)	(nW2 = 174)	(nW2 = 310)



# Upskilling, career advancement, more available time

Why interest in pursuing further education has increased for a majority of respondents



The new era of Digital Intelligence and machine learning has interested me to look to technology in a new light. **I am adapting myself to the same to keep up with the changing trends.**

-- India

I realized that there is always more room for learning and that we should always upgrade ourselves whenever we can. **I will need a proper qualification to back up my existing skills in case of another pandemic.**

-- Singapore

Because **I have more free time** - and because there are many issues that interest me where I would like to have more knowledge.

-- Germany

Because due to the pandemic, we have all had to **modernize and start to handle digital media in a better way**, so many of these courses could be very helpful to deepen in these fields and get more out of them.

-- Colombia

As demand in the labor market has become increasingly demanding, in order to achieve **good placement and better income**, it is necessary to **invest in knowledge.**

-- Brazil

The impact of the pandemic is something that has led me to **consider the path I am taking and the value I am able to provide in my current role.** As such, I have become more interested in considering and, ultimately, **pursuing different options for the future.**

-- United Kingdom



# Financial hindrances, safety, and no motivations

Why interest in pursuing further education has decreased for a small number of respondents



Covid 19 situation is directly **affected by my income** as well as family affairs with my **mind and a little bit physically**.  
-- India

I am **confused about my current / future jobs**. I want to save maximum amount of money.  
-- United Arab Emirates

Because of **unavailability of resources for online studying** makes me feel about decreasing towards professional learning.  
-- India

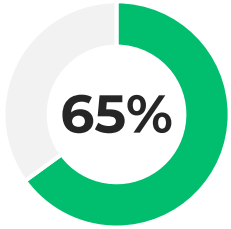
Because I want **learn more other skill** in business so that in **future** during any upcoming crisis, I will work online easily.  
-- India

Lack of time. **Physical and intellectual exhaustion**.  
-- Chile



# Interest in online education is increasing!

How interest in pursuing online education has changed due to the current global developments

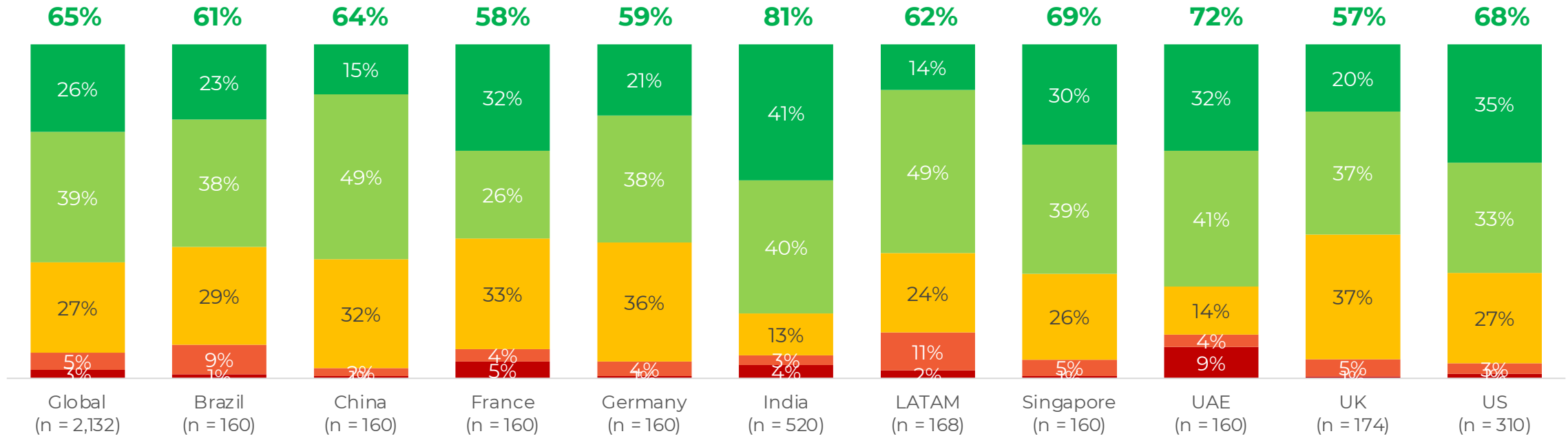


claim their interest in pursuing online education has **increased**

**Interest in pursuing further education through an online program is increasing!** Participants feel like they are getting used to online learning and are seeing more and more benefits in it. Online learning is perceived as a convenient way to upskilling and acquire new skills. It also provides access to content and institutions that people would normally not have access to in F2F learning environments.

T2B<sup>1</sup>  
Top 2 Box

■ Significantly decreased ■ Decreased ■ Stayed the same ■ Increased ■ Significantly increased



T2B sig. dif.

BRA, CHI, FRA  
GER, LATAM, UK

UK

And to what extent would you say your interest in pursuing further education/professional learning through an online program has changed due to the current global developments?

<sup>1</sup> T2B results: 4 or 5 in a 5-point scale.



# Difficulty to adapt and follow online learning

Why interest in pursuing online education has decreased for a small number of respondents



*The drawbacks of online education overpower the advantages. We tend to face many issues like **health issues** due to continuous sitting or less physical movement, eye strain due to long working hours or studying time.*

-- India

*There are other things that requires more focus such as finding ways to **improve financial situations**.*

-- United Arab Emirates

*I did not like how they are offered, and **I do not feel that I can absorb the information well**.*

-- Brazil

*In my current role, and made worse by the impact of the pandemic, **I feel I am becoming ever more tied to my laptop, something I am keen to break away from**.*

-- United Kingdom

*With covid we cannot work normally, **what would be the point of additional training if we lose our job?***

-- France

*Online teaching is **difficult to follow** some of the topics and also practicals; difficult to monitor the students and conduction of assignments, etc.*

-- India



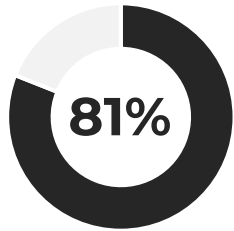




## ONLINE EDUCATION PREFERENCES

# Shorter formats are preferred over longer ones

## Formats considered to obtain further education



of those who consider a free option also consider a paid format

**Eight in ten of those who consider a free option would also consider a paid one.** Shorter formats, with short term outcomes, are considered to a greater extent than longer formats.

	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Free self-guided learning	30%	31%	15%	31%	37%	27%	38%	34%	29%	30%	31%
Paid online mini courses	28%	29%	16%	27%	32%	28%	31%	31%	28%	22%	34%
Paid online short courses	26%	28%	26%	24%	20%	24%	27%	33%	31%	24%	27%
Free MOOCs	25%	18%	29%	18%	25%	29%	27%	33%	19%	29%	26%
Paid online MicroMasters	21%	28%	30%	18%	18%	25%	19%	20%	17%	9%	27%
Paid online MicroBachelors	21%	23%	32%	18%	16%	23%	17%	23%	19%	13%	26%
Paid online postgraduate diploma	21%	20%	28%	13%	14%	26%	20%	23%	23%	11%	30%
Paid MOOCs	21%	16%	31%	14%	16%	23%	16%	23%	21%	18%	28%
Paid online graduate, good 2nd tier university	19%	18%	29%	13%	13%	24%	14%	18%	18%	13%	29%
Paid online professional certificates	17%	15%	18%	15%	8%	23%	12%	16%	17%	14%	27%
Paid online graduate, top, global university	16%	17%	28%	8%	4%	25%	16%	16%	12%	13%	25%
Paid online UG, good 2nd tier university	15%	16%	23%	13%	6%	20%	11%	13%	17%	8%	27%
Paid online UG, top, global university	15%	11%	26%	15%	5%	19%	15%	16%	13%	10%	24%
Paid online bootcamps	11%	4%	16%	14%	4%	18%	6%	12%	9%	7%	17%
Other	2%	3%	0%	4%	1%	0%	2%	0%	0%	4%	1%

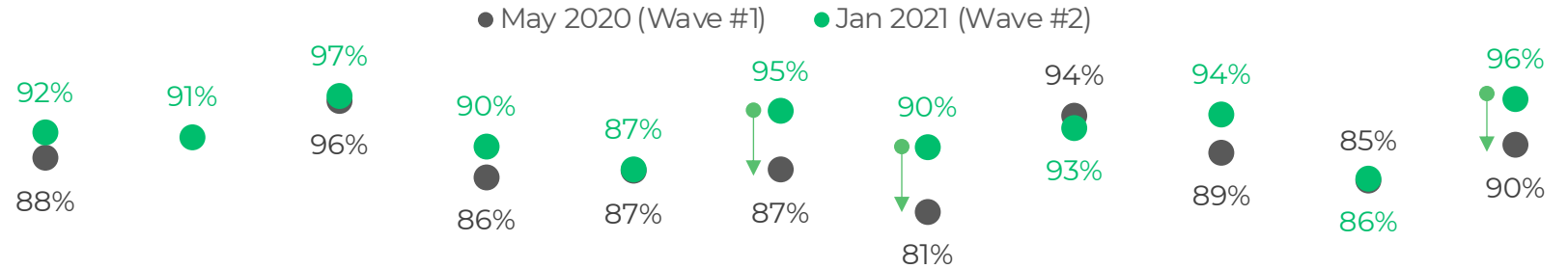
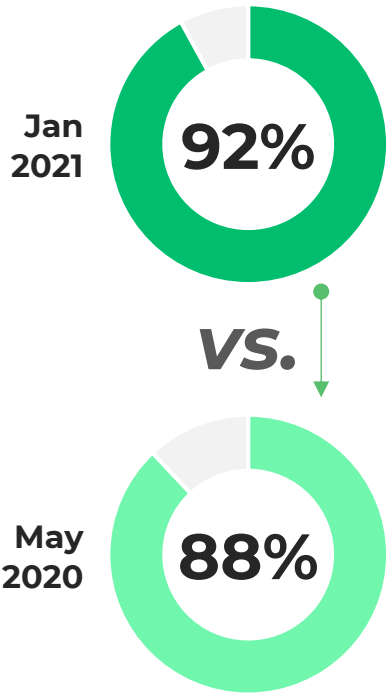


# 92% consider a paid option to pursue further education

Formats considered to obtain further education | Wave #1 x Wave #2

Significant difference at 0.05 sig level

consider a **paid option** to pursue further education



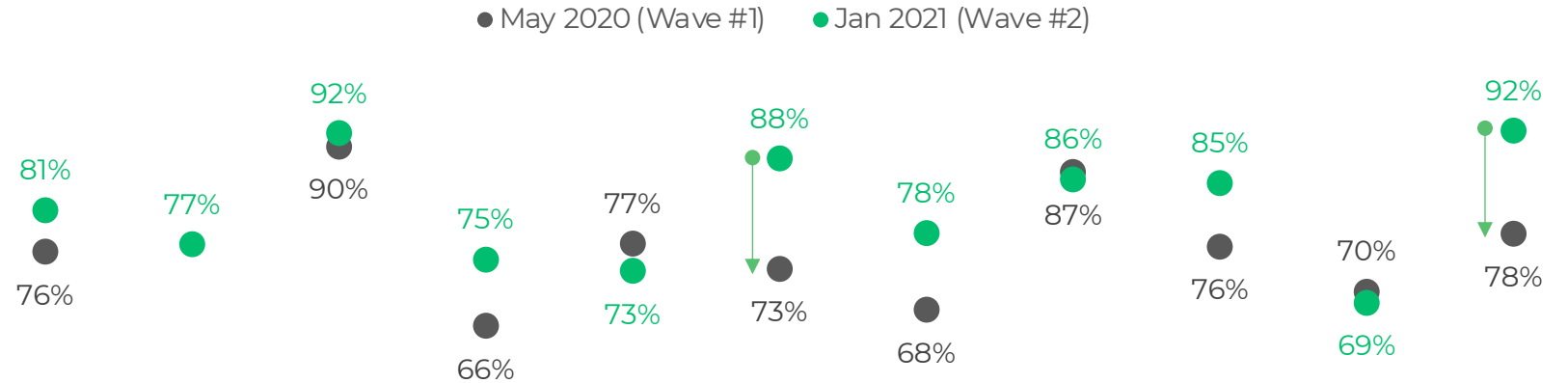
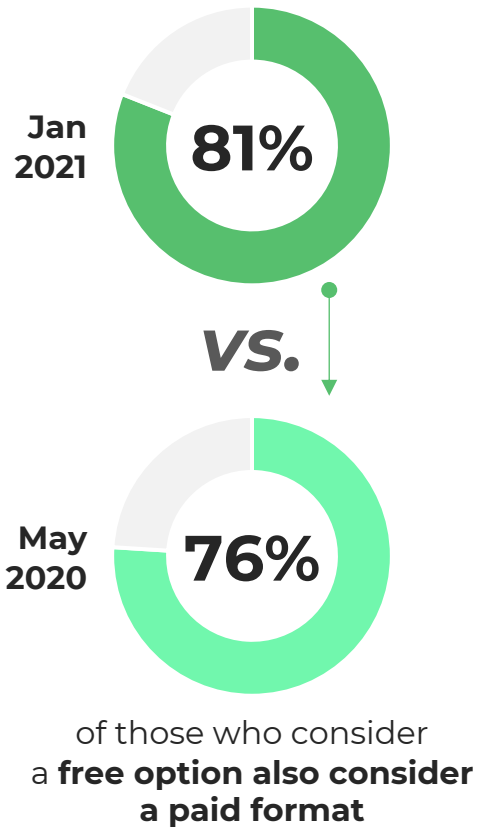
Region	Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
nW1	1,560	NA	156	156	156	156	156	156	156	156	312
nW2	2,132	160	160	160	160	520	168	160	160	174	310



# High consideration of paid learning formats

Formats considered to obtain further education | Wave #1 x Wave #2

Significant difference at 0.05 sig level



Region	Global	Brazil	China	France	Germany	India	LATAM	Singapore	UAE	UK	US
nW1	1,560	NA	156	156	156	156	156	156	156	156	312
nW2	2,132	160	160	160	160	520	168	160	160	174	310



# Education providers/formats - specs

## Formats considered to obtain further education

### Free self-guided learning

(e.g., YouTube tutorials, forums, etc.) – broad range of topics

### Free MOOCs, Massive Online Open Courses

(through Coursera, edX, FutureLearn, etc.; typically 1-2 months) – broad range of topics

### Paid online mini courses

(typically 10-20 hours; US\$ 300 - US\$ 900 cost) – skill-based topics

### Paid MOOCs, Massive Online Open Courses

(through Coursera, edX, FutureLearn, etc.; typically 1-2 months; up to US\$ 1K cost) – broad range of topics

### Paid online short courses

(typically 2 months; US\$ 1K - US\$ 5K cost) - skill-based topics

### Paid online bootcamps

(typically 6 months; US\$ 10K - US\$ 20K cost) - skill-based topics

### Paid online professional certificates

(typically 9 months; US\$ 20K - US\$ 50K cost) - skill-based topics

### Paid online MicroBachelors

(typically 4-12 months; US\$ 500 - US\$ 1,5K) – 4 to 8 entry-level undergraduate courses dedicated to a particular topic, credits can count towards a full undergraduate degree

### Paid online MicroMasters

(typically 6-12 months; US\$ 500 – US\$ 1,5K) – 4 to 8 courses of a graduate-level program, credits can count towards a full graduate degree

### Paid online undergraduate (Associate, Bachelor's, etc.) degrees with a top, global university

(typically 24-48 months; US\$ 20K - US\$ 100K cost)

### Paid online undergraduate (Associate, Bachelor's, etc.) degrees with good second tier university

(typically 24-48 months; US\$ 8K - US\$ 15K cost)

### Paid online postgraduate diploma

(typically 4-6 months; US\$ 5k – US\$ 7k) – a postgraduate qualification awarded after an undergraduate degree which supplements the original degree (shorter than a master's degree, but at the same academic level)

### Paid online graduate (Master's, Doctoral/PhD, etc.) degrees with a top, global university

(typically 12-36 months; US\$ 20K - US\$ 200K cost)

### Paid online graduate (Master's, Doctoral/PhD, etc.) degrees with a good second tier university

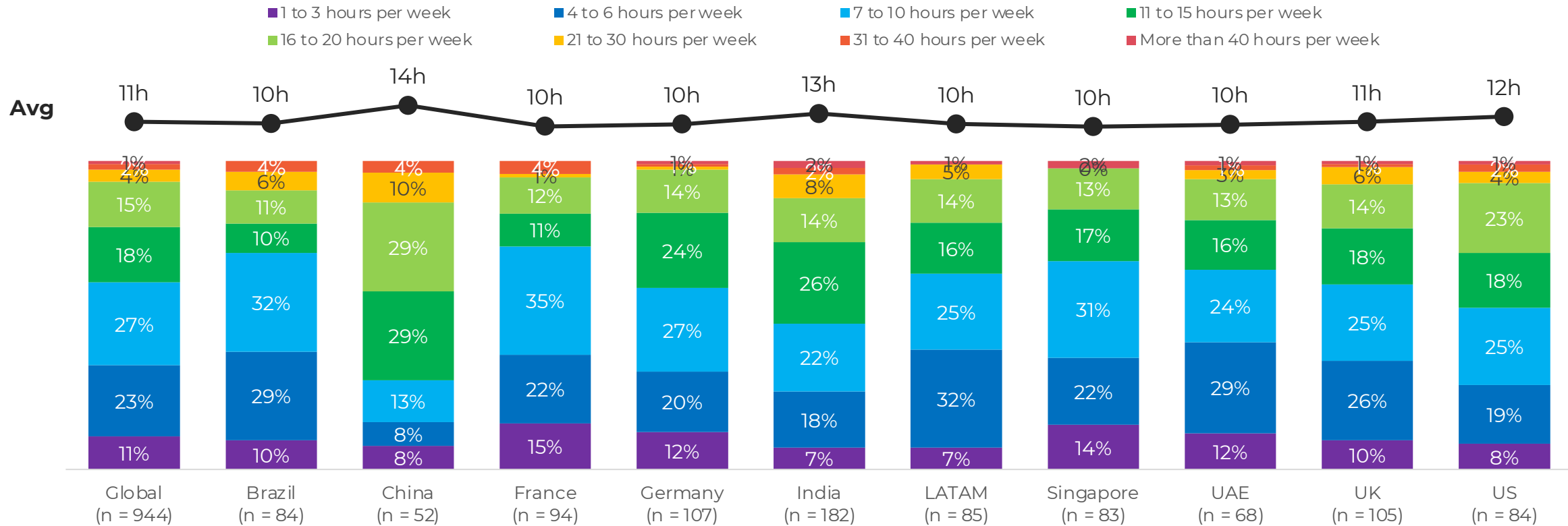
(typically 12-36 months; US\$ 8K - US\$ 15K cost)



# On average, they are willing to dedicate 11h/week to education

## Weekly hours willing to dedicate to education (only those who do not consider a degree)

Overall, participants are willing to dedicate **11 hours per week** to furthering their education or professional learning. China's average is 14h, the highest across markets, followed by India (13h), and US (12h). Singapore has the lowest average, at 9.6h.



T2B sig. dif.

BRA, FRA, GER,  
LATAM, SG,  
UAE, UK

How many hours per week would you say you would be willing to dedicate to furthering your education/professional learning, including watching lectures and assignments (filter: only those who do not consider a graduate, postgraduate, or undergraduate format).

# Live sessions are preferred over recorded content

## Live x recorded online learning preference (ranking)

RANK >	#1	#2	#3	#4
<b>Global</b> (n = 2,132)	Mostly live (2.14)	100% live (2.16)	Mostly recorded (2.49)	100% recorded (3.20)
<b>Brazil</b> (n = 160)	Mostly live (2.04)	Mostly recorded (2.26)	100% live (2.57)	100% recorded (3.13)
<b>China</b> (n = 160)	100% live (1.90)	Mostly live (2.39)	Mostly recorded (2.57)	100% recorded (3.14)
<b>France</b> (n = 160)	Mostly live (2.11)	100% live (2.20)	Mostly recorded (2.51)	100% recorded (3.18)
<b>Germany</b> (n = 160)	Mostly live (1.94)	100% live (2.39)	Mostly recorded (2.40)	100% recorded (3.28)
<b>India</b> (n = 520)	100% live (1.77)	Mostly live (2.25)	Mostly recorded (2.72)	100% recorded (3.26)
<b>LATAM</b> (n = 168)	100% live (1.91)	Mostly live (2.07)	Mostly recorded (2.64)	100% recorded (3.39)
<b>Singapore</b> (n = 160)	Mostly live (1.94)	100% live (2.23)	Mostly recorded (2.50)	100% recorded (3.33)
<b>UAE</b> (n = 160)	100% live (1.88)	Mostly live (2.25)	Mostly recorded (2.60)	100% recorded (3.27)
<b>UK</b> (n = 174)	Mostly live (2.19)	Mostly recorded (2.37)	100% live (2.39)	100% recorded (3.05)
<b>US</b> (n = 310)	Mostly live (2.24)	100% live (2.35)	Mostly recorded (2.37)	100% recorded (3.04)

Overall, live sessions (either 100% live or mostly live) are preferred over recorded content. 100% recorded content is clearly the least preferred option, but a combination of live and recorded, mostly recorded content, ranks #2 in Brazil and the UK.

#rank  
average<sup>1</sup>

Global  
(n = 2,132)

#1  
2.14

A combination of live and recorded sessions, **mostly live sessions**

#2  
2.16

**100% live sessions**

#3  
2.49

A combination of live and recorded sessions, **mostly recorded sessions**

#4  
3.20

**100% recorded sessions**



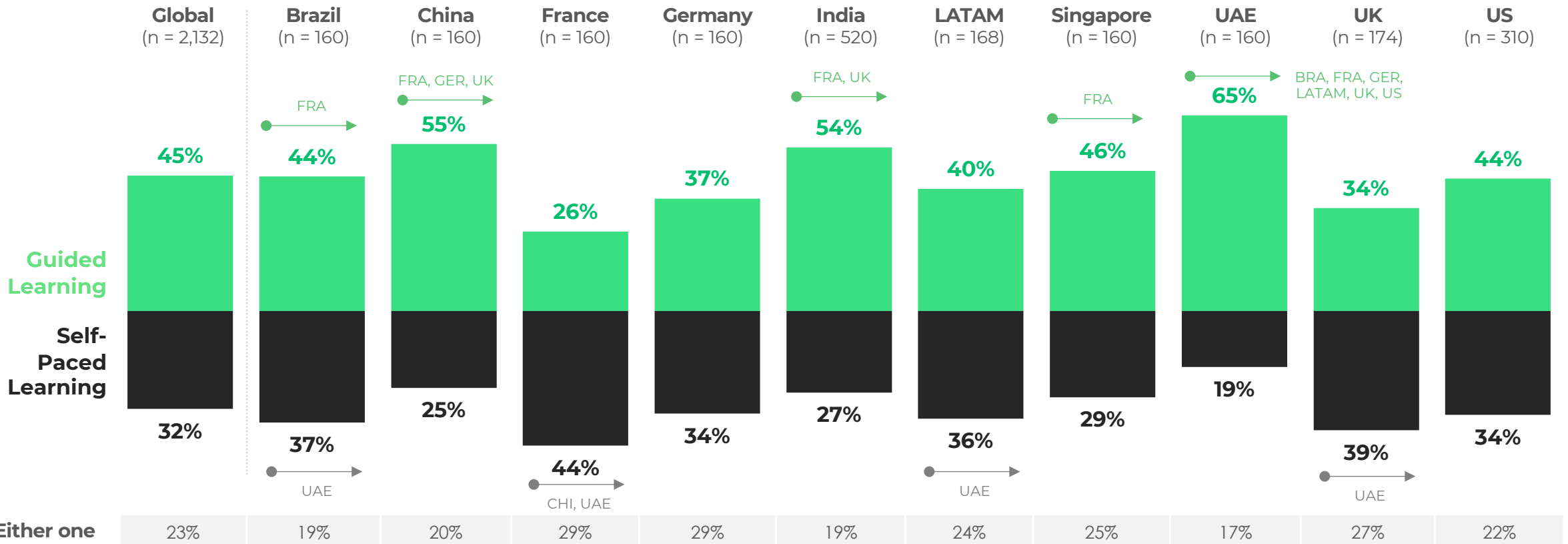
What would you say is your preferred approach to how online classes are delivered? Please rank the following delivery options from your MOST PREFERRED (1) to your LEAST PREFERRED (4). Keep in mind that all sessions are online/virtual. (ranking). | <sup>1</sup>Options were ranked based on the average position score weighted by the frequency of choice of each alternative in each position (the lower the score, the higher they are ranked).

# Guided learning is preferred over self-paced learning

## Preferred learning pace

Significant difference at 0.05 sig level

Overall, **guided learning is preferred over self-paced learning**, especially among participants from the UAE and China, but France and UK are exceptions.



**Self-paced learning:** all the content is released upfront, and you can complete it at your own pace until an estimated deadline.

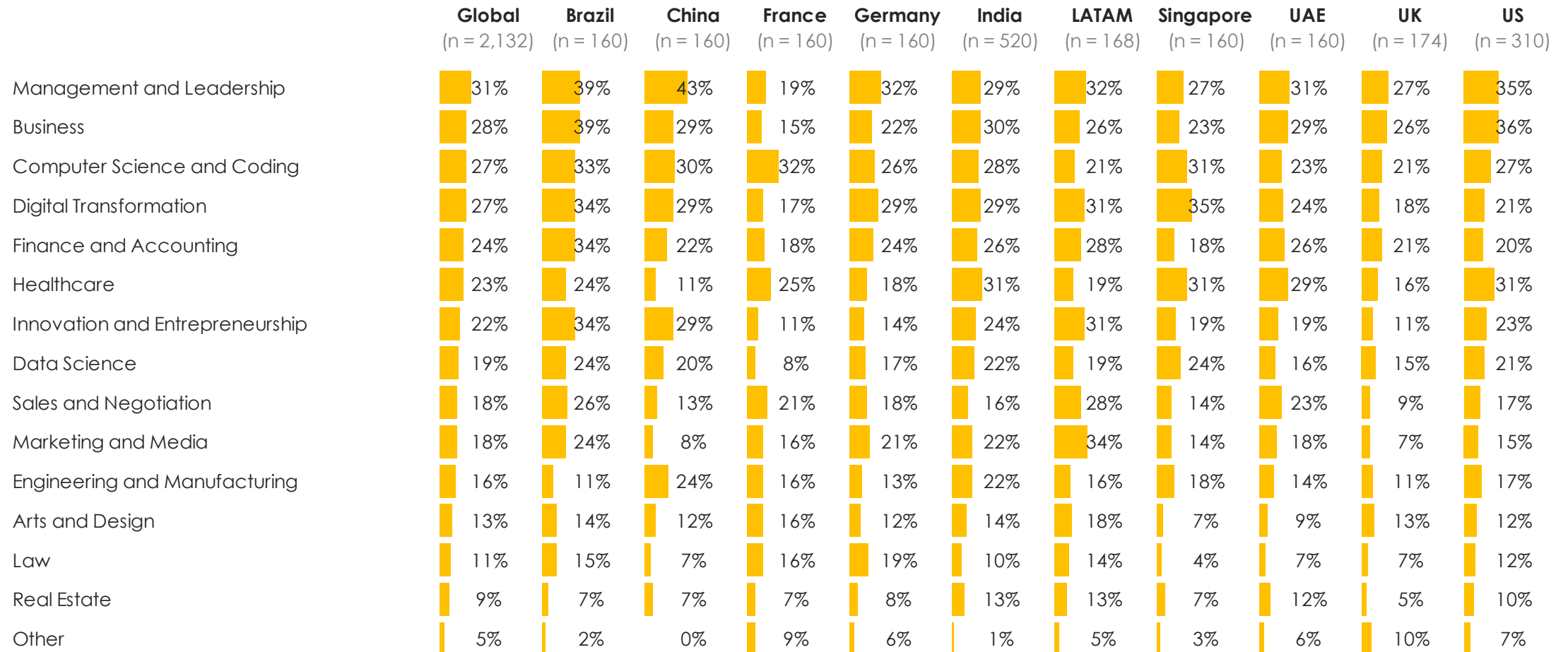
**Guided learning:** content is released periodically in modules and you have to complete each module before you move to the next one.





# Different markets prioritize different subjects or topics

Subjects or topics that are priorities for learning and development



What subjects or topics are priorities for your learning and development? Please select all that apply. (multiple-choice)



## ONLINE EDUCATION PRE X POST-COVID

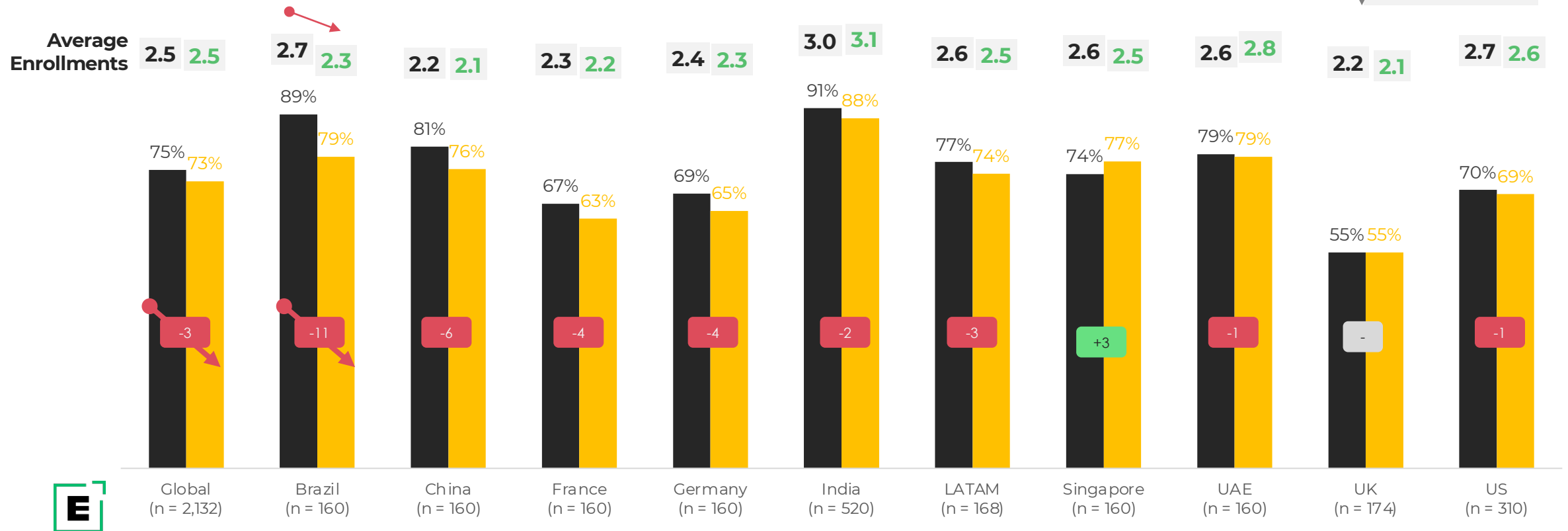
# Pace of online enrollments pre and post-covid did not change

Online enrollments 2018-2019 x since March 2020

Overall, pace of enrollments in online programs since March 2020 (post-COVID) did not change significantly in comparison to enrollments between 2018 and 2019 (pre-COVID). Brazil is the exception, with a 11 p.p. decrease.

■ 2018-2019 (pre-COVID) ■ Since March 2020 (post-COVID)

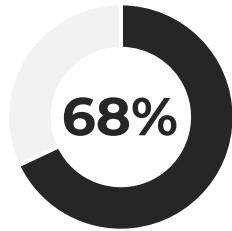
Significant difference at 0.05 sig level



<sup>1</sup> How many online programs did you attend/enroll in between 2018 and 2019? | <sup>2</sup> How many online programs have you attended/enrolled in since March 2020?

# Free formats were the most popular post-COVID

Online program format enrolled since March 2020



of those who enrolled in a free option also enrolled in a paid format

**Two-thirds of those who enrolled in a free option also enrolled in a paid format.** Shorter formats, with short term outcomes, received more enrollments than longer formats

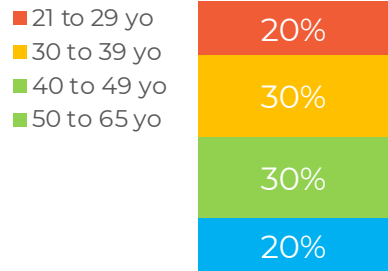
	Global (n = 1,597)	Brazil (n = 126)	China (n = 121)	France (n = 101)	Germany (n = 104)	India (n = 460)	LATAM (n = 125)	Singapore (n = 124)	UAE (n = 126)	UK (n = 95)	US (n = 215)
Free self-guided learning	28%	39%	19%	21%	34%	27%	34%	27%	28%	26%	27%
Free MOOCs	27%	29%	12%	27%	29%	26%	27%	31%	29%	26%	32%
Paid online mini courses	23%	25%	20%	24%	28%	23%	21%	22%	18%	23%	25%
Paid online short courses	21%	22%	26%	34%	13%	20%	22%	19%	14%	11%	26%
Paid online postgraduate diploma	18%	12%	17%	22%	18%	22%	20%	17%	17%	7%	25%
Paid MOOCs	17%	7%	15%	20%	19%	24%	13%	16%	20%	8%	29%
Paid online MicroBachelors	17%	11%	18%	23%	17%	20%	11%	16%	17%	3%	28%
Paid online professional certificates	15%	6%	15%	18%	10%	18%	18%	11%	18%	5%	32%
Paid online MicroMasters	15%	10%	16%	13%	12%	19%	11%	15%	21%	4%	25%
Paid online UG, top, global university	14%	6%	13%	13%	13%	16%	13%	11%	19%	6%	22%
Paid online graduate, top, global university	13%	6%	14%	14%	7%	19%	10%	15%	13%	7%	24%
Paid online UG, good 2nd tier university	13%	6%	15%	14%	8%	20%	12%	12%	10%	9%	22%
Paid online graduate, good 2nd tier university	13%	7%	13%	14%	10%	20%	10%	11%	10%	7%	23%
Paid online bootcamps	11%	3%	17%	13%	2%	17%	13%	8%	12%	3%	18%
Other	2%	5%	0%	2%	2%	0%	5%	2%	1%	2%	0%





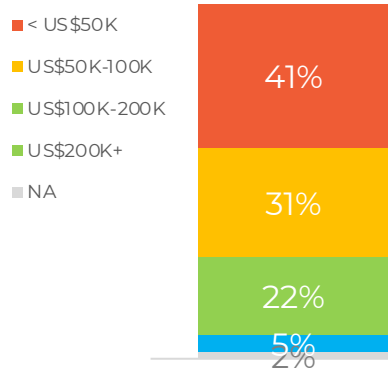
## RESPONDENT PROFILE

# Respondent profile



Global  
(n = 2,132)

AGE <sup>1</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
21 to 29 yo	20%	20%	20%	20%	20%	20%	19%	20%	20%	20%	20%
30 to 39 yo	30%	30%	30%	30%	30%	30%	29%	30%	30%	32%	31%
40 to 49 yo	30%	30%	30%	30%	30%	30%	32%	30%	30%	28%	31%
50 to 65 yo	20%	20%	20%	20%	20%	20%	21%	20%	20%	20%	18%
<b>Average</b>	<b>39 yo</b>	<b>39 yo</b>	<b>39 yo</b>	<b>39 yo</b>	<b>39 yo</b>	<b>40 yo</b>	<b>39 yo</b>	<b>40 yo</b>	<b>38 yo</b>	<b>39 yo</b>	<b>39 yo</b>



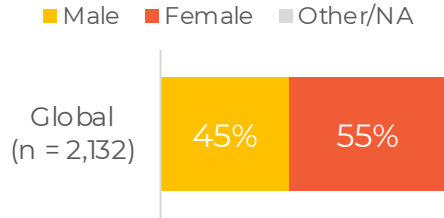
Global  
(n = 2,132)

INCOME <sup>2</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
< US\$ 10K	10%	22%	4%	5%	7%	12%	20%	7%	13%	7%	2%
US\$ 10K-25K	13%	19%	6%	13%	14%	12%	23%	10%	11%	18%	6%
US\$ 25K-50K	17%	21%	10%	31%	23%	11%	12%	15%	12%	29%	11%
US\$ 50K-75K	16%	16%	11%	19%	29%	10%	11%	23%	10%	17%	11%
US\$ 75K-100K	15%	7%	9%	21%	13%	22%	12%	22%	9%	14%	19%
US\$ 100K-125K	8%	2%	10%	2%	2%	13%	2%	6%	24%	3%	12%
US\$ 125K-150K	5%	3%	13%	4%	4%	4%	4%	4%	5%	3%	9%
US\$ 150K-175K	6%	3%	17%	2%	2%	5%	5%	9%	5%	2%	9%
US\$ 175K-200K	3%	1%	10%	0%	1%	6%	1%	1%	1%	2%	9%
US\$ 200K-250K	2%	1%	8%	1%	0%	3%	4%	1%	4%	1%	3%
US\$ 250K-300K	1%	1%	1%	0%	0%	1%	2%	1%	1%	0%	5%
US\$ 300K+	1%	1%	2%	1%	2%	0%	2%	2%	2%	0%	2%
Prefer not to say	2%	1%	0%	3%	2%	1%	2%	0%	4%	3%	1%
<b>Average (US\$)</b>	<b>78K</b>	<b>53K</b>	<b>122K</b>	<b>60K</b>	<b>62K</b>	<b>81K</b>	<b>65K</b>	<b>79K</b>	<b>86K</b>	<b>57K</b>	<b>115K</b>

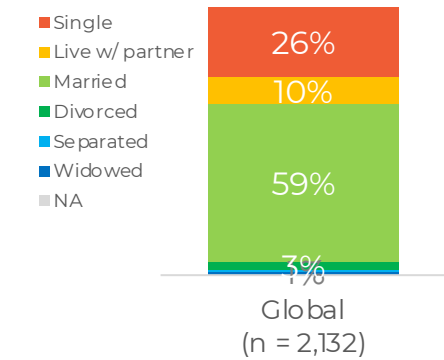


<sup>1</sup> How old are you? | <sup>2</sup> Which one of the following categories best describes your gross annual personal income (before deductions and taxes)? Please estimate a value in US dollars (US\$).

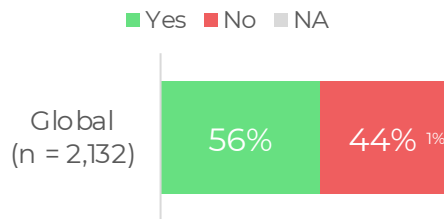
# Respondent profile



GENDER <sup>1</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Female	55%	49%	54%	62%	60%	46%	48%	69%	58%	51%	51%
Male	45%	51%	46%	37%	40%	54%	52%	31%	42%	49%	49%
Other/NA	0%	0%	0%	1%	0%	0%	1%	0%	0%	1%	0%



MARITAL STATUS <sup>2</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Single	26%	26%	20%	19%	29%	21%	29%	29%	27%	31%	28%
Live w/ partner	10%	13%	1%	14%	18%	2%	15%	4%	3%	24%	5%
Married	59%	51%	77%	61%	46%	74%	45%	63%	69%	41%	62%
Divorced	3%	7%	1%	4%	5%	1%	4%	3%	1%	3%	4%
Separated	1%	1%	0%	1%	0%	1%	4%	0%	1%	1%	1%
Widowed	1%	1%	0%	0%	2%	1%	2%	1%	0%	1%	1%
Prefer not to say	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%

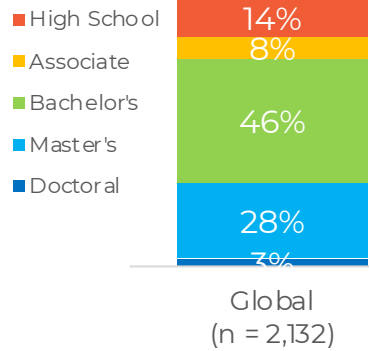


CHILDREN <sup>3</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Yes	56%	61%	41%	65%	34%	59%	60%	54%	74%	49%	62%
No	44%	39%	59%	33%	66%	41%	39%	44%	26%	51%	38%
Prefer not to say	1%	1%	0%	2%	0%	0%	1%	1%	1%	0%	0%

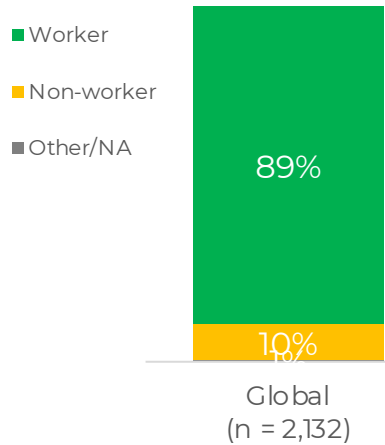


<sup>1</sup> Which gender do you identify with? | <sup>2</sup> Which of the following best describes your marital status? | <sup>3</sup> Do you have any children 18 or younger living in your household?

# Respondent profile



EDUCATION LEVEL <sup>1</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
High School	14%	20%	11%	7%	21%	11%	15%	15%	11%	17%	14%
Associate	8%	5%	9%	13%	4%	9%	11%	5%	9%	9%	6%
Bachelor's	46%	48%	66%	53%	42%	36%	46%	46%	32%	45%	49%
Master's	28%	20%	14%	23%	30%	42%	24%	34%	44%	22%	29%
Doctoral	3%	7%	1%	4%	3%	2%	4%	0%	3%	6%	2%



EMPLOYMENT STATUS <sup>2</sup>	Global (n = 2,132)	Brazil (n = 160)	China (n = 160)	France (n = 160)	Germany (n = 160)	India (n = 520)	LATAM (n = 168)	Singapore (n = 160)	UAE (n = 160)	UK (n = 174)	US (n = 310)
Employed full time	70%	51%	91%	72%	68%	65%	51%	86%	82%	66%	72%
Employed part-time	10%	15%	2%	7%	11%	15%	12%	6%	7%	16%	8%
Self-employed/freelance	6%	18%	4%	4%	5%	8%	10%	2%	4%	3%	2%
Entrepreneur/business owner	3%	7%	1%	4%	2%	3%	9%	2%	1%	1%	2%
Not employed, looking for work	3%	4%	1%	3%	5%	1%	9%	1%	2%	4%	5%
Not employed, not looking for work	1%	0%	0%	1%	0%	0%	2%	0%	1%	1%	1%
Retired	1%	3%	0%	2%	2%	1%	1%	1%	0%	1%	1%
Student	3%	1%	2%	6%	5%	4%	1%	1%	3%	4%	6%
Other/NA	1%	1%	0%	0%	1%	1%	4%	1%	0%	3%	3%



<sup>1</sup> What is your highest level of education? | <sup>2</sup> Which of the following best describes your current employment status?



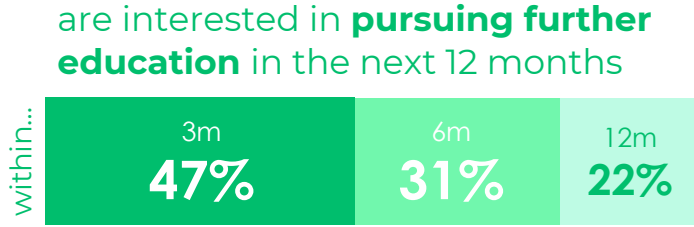


## MARKET SUMMARIES

# Global Consumer Sentiment | Global

Learning about the future of online education | Wave #2

**2,132**  
RESPONDENTS



**81%** out of those who consider a free option also consider a paid option

## Top 5 Formats

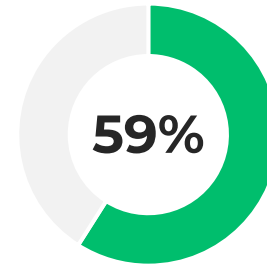
preferred program formats

- #1 Free self-guided learning
- #2 Paid online mini courses
- #3 Paid online short courses
- #4 Free MOOCs
- #5 Paid online MicroMasters

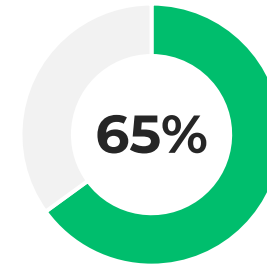


believe **online learning adoption will increase** in the near future

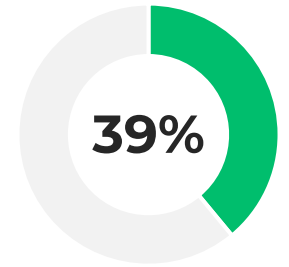
## due to the current global developments...



claim their interest in pursuing **further education** has **increased**

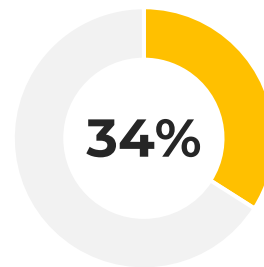


claim their interest in pursuing **online education** has **increased**

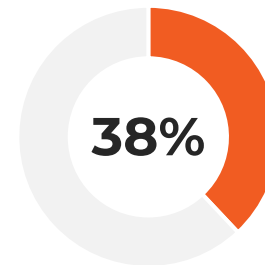


expect their **personal spend with education** to **increase** in the next 6 months

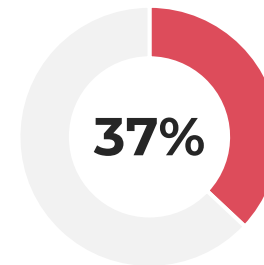
## considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**79%**

would consider either a hybrid or online approach

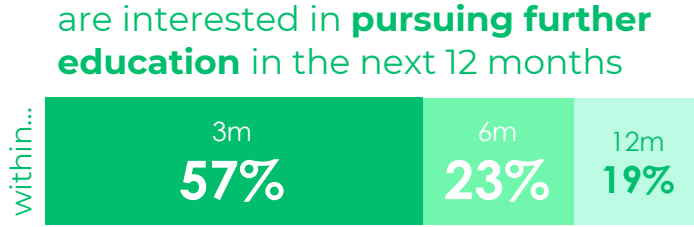


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | Brazil

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

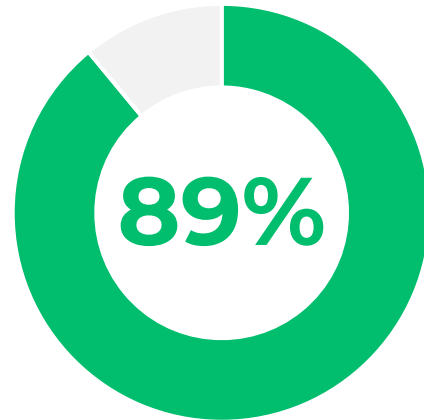


**77%** out of those who consider a free option also consider a paid option

## Top 5 Formats

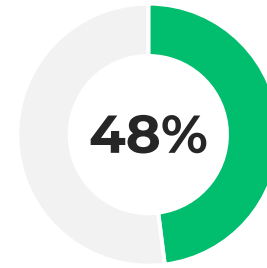
preferred program formats

- #1 Free self-guided learning
- #2 Paid online mini courses
- #3 Paid online short courses
- #4 Paid online MicroMasters
- #5 Paid online MicroBachelors

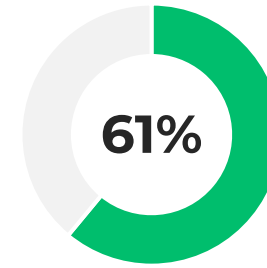


believe **online learning adoption will increase** in the near future

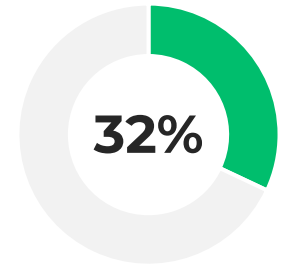
due to the current global developments...



claim their interest in pursuing **further education** has **increased**

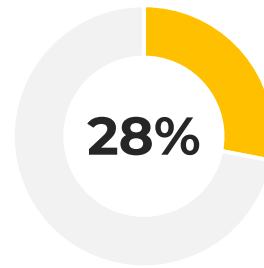


claim their interest in pursuing **online education** has **increased**

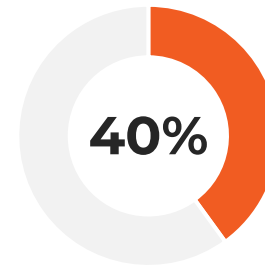


expect their **personal spend with education to increase** in the next 6 months

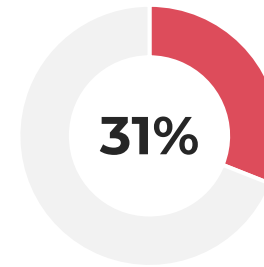
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**83%**

would consider either a hybrid or online approach

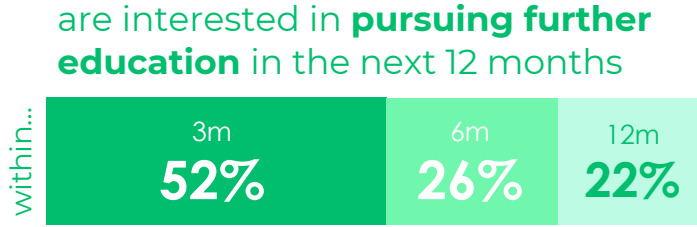


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | China

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

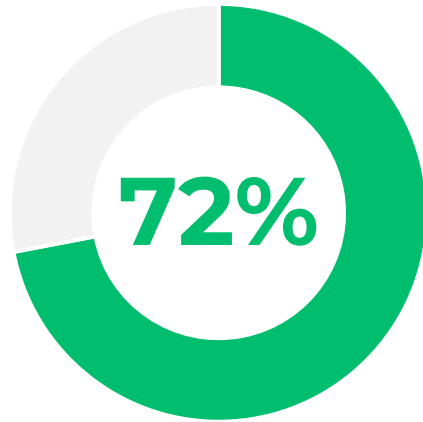


92% out of those who consider a free option also consider a paid option

## Top 5 Formats

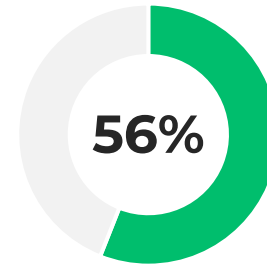
preferred program formats

- #1 Paid online MicroBachelors
- #2 Paid MOOCs
- #3 Paid online MicroMasters
- #4 Paid online graduate, good 2<sup>nd</sup> tier university
- #5 Free MOOCs

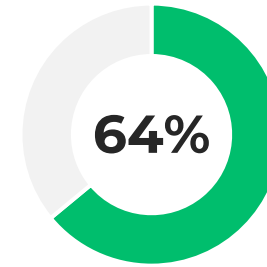


believe **online learning adoption will increase** in the near future

due to the current global developments...



claim their interest in pursuing **further education** has **increased**

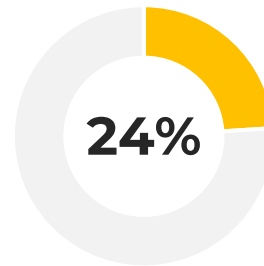


claim their interest in pursuing **online education** has **increased**

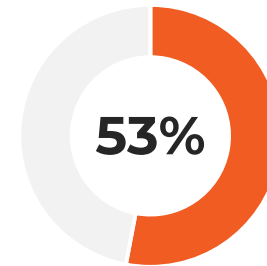


expect their **personal spend with education to increase** in the next 6 months

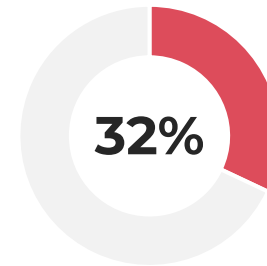
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**86%**

would consider either a hybrid or online approach

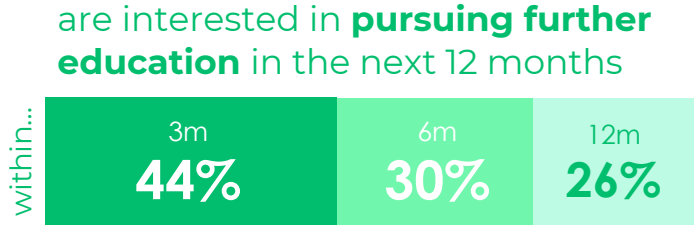


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | France

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

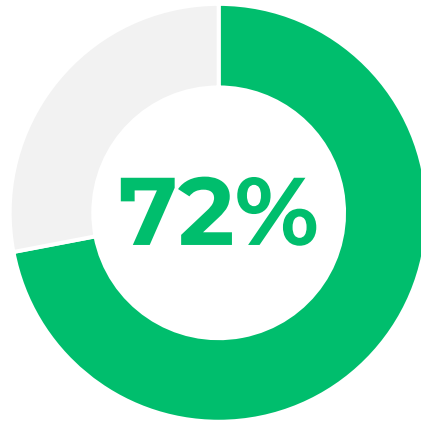


**75%** out of those who consider a free option also consider a paid option

## Top 5 Formats

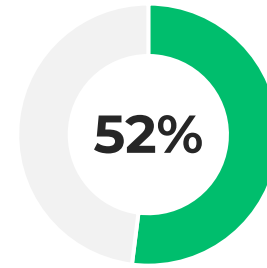
preferred program formats

- #1 Free self-guided learning
- #2 Paid online mini courses
- #3 Paid online short courses
- #4 Paid online MicroMasters
- #5 Paid online MicroBachelors

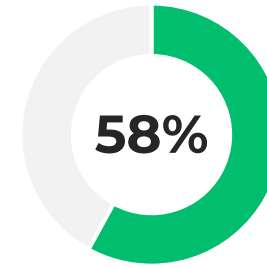


believe **online learning adoption will increase** in the near future

due to the current global developments...



claim their interest in pursuing **further education** has increased

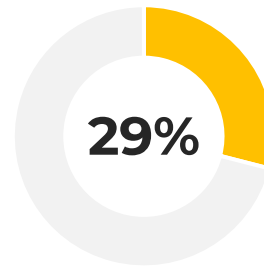


claim their interest in pursuing **online education** has increased

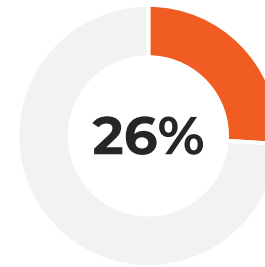


expect their **personal spend with education** to increase in the next 6 months

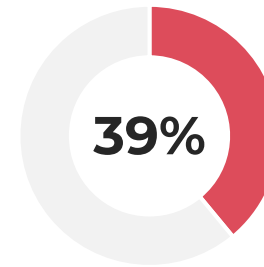
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**62%**

would consider either a hybrid or online approach

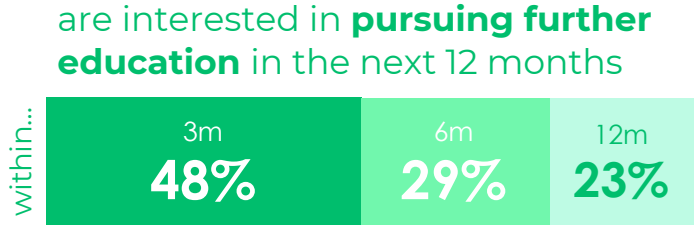


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | Germany

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

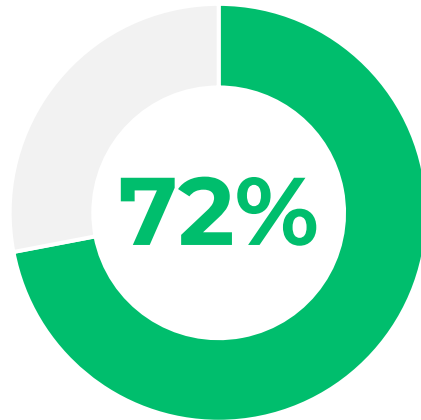


**73%** out of those who consider a free option also consider a paid option

## Top 5 Formats

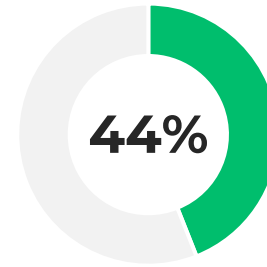
preferred program formats

- #1 Free self-guided learning
- #2 Paid online mini courses
- #3 Free MOOCs
- #4 Paid online short courses
- #5 Paid online MicroMasters

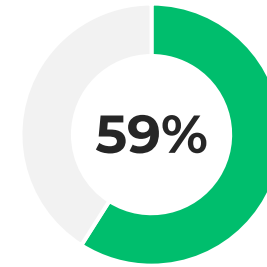


believe **online learning adoption will increase** in the near future

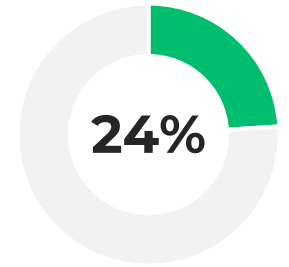
due to the current global developments...



claim their interest in pursuing **further education** has increased

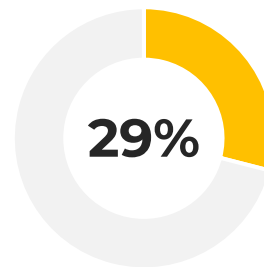


claim their interest in pursuing **online education** has increased

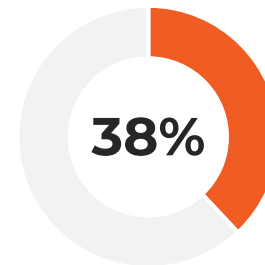


expect their **personal spend with education** to increase in the next 6 months

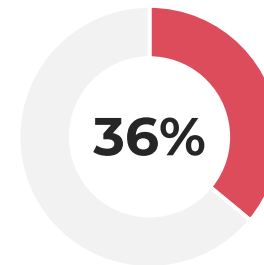
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**77%**

would consider either a hybrid or online approach

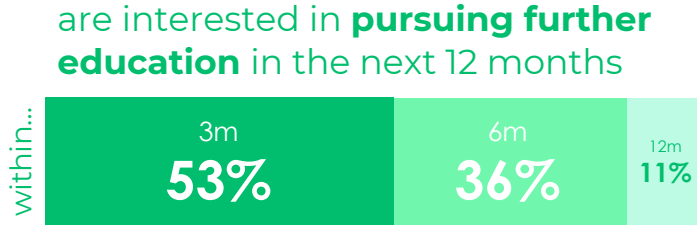


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | India

Learning about the future of online education | Wave #2

**520**  
RESPONDENTS

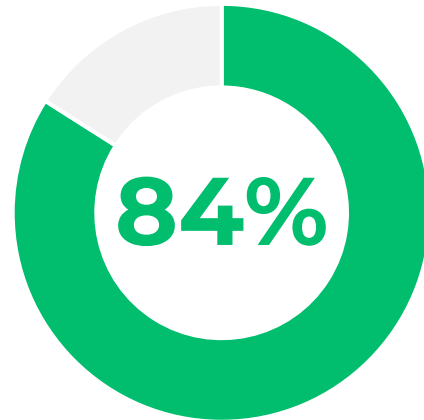


**88%** out of those who consider a free option also consider a paid option

## Top 5 Formats

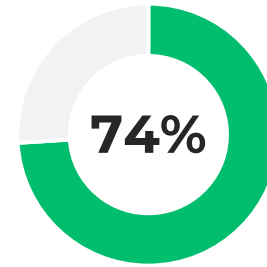
preferred program formats

- #1 Free MOOCs
- #2 Paid online mini courses
- #3 Free self-guided learning
- #4 Paid online postgraduate diploma
- #5 Paid online graduate, top, global university

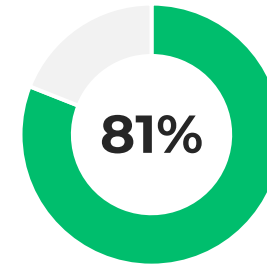


believe **online learning adoption will increase** in the near future

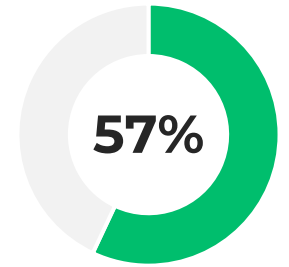
due to the current global developments...



claim their interest in pursuing **further education** has increased

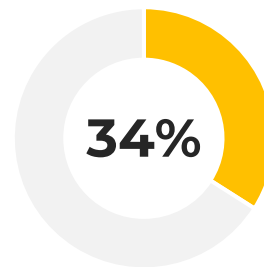


claim their interest in pursuing **online education** has increased

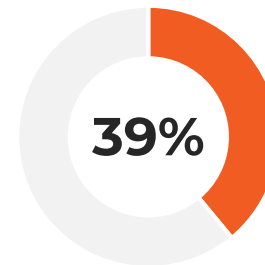


expect their **personal spend with education to increase** in the next 6 months

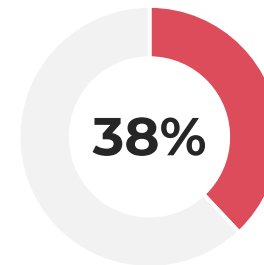
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**77%**

would consider either a hybrid or online approach

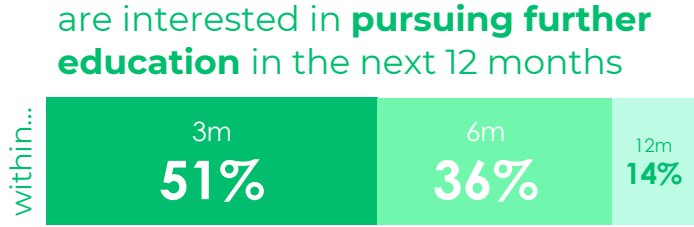


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | LATAM

Learning about the future of online education | Wave #2

**168**  
RESPONDENTS

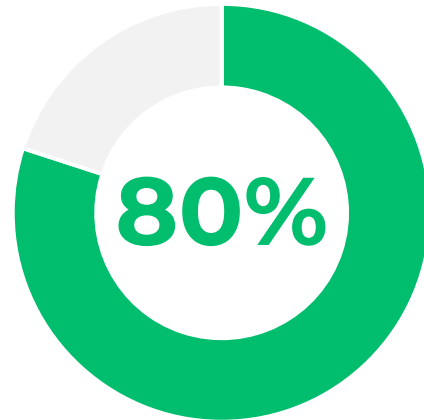


**78%** out of those who consider a free option also consider a paid option

## Top 5 Formats

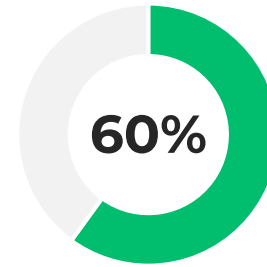
preferred program formats

- #1 Free self-guided learning
- #2 Paid online mini courses
- #3 Free MOOCs
- #4 Paid online short courses
- #5 Paid online postgraduate diploma

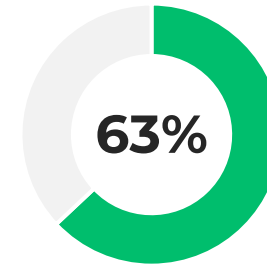


believe **online learning adoption will increase** in the near future

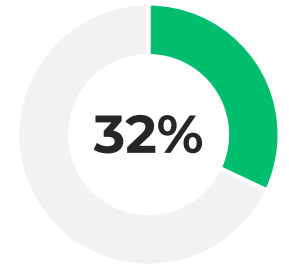
due to the current global developments...



claim their interest in pursuing **further education** has **increased**

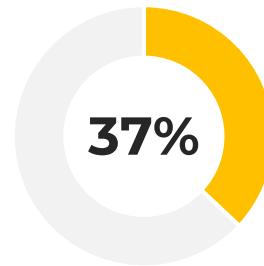


claim their interest in pursuing **online education** has **increased**

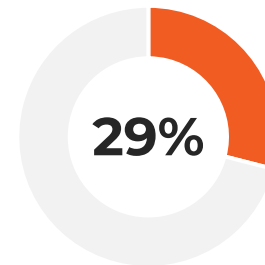


expect their **personal spend with education to increase** in the next 6 months

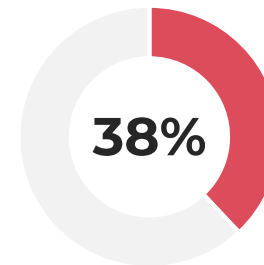
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**89%**

would consider either a hybrid or online approach



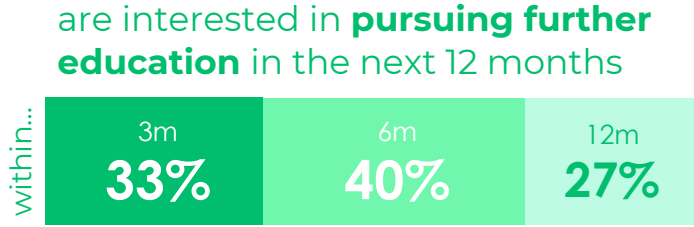
SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)



# Global Consumer Sentiment | Singapore

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

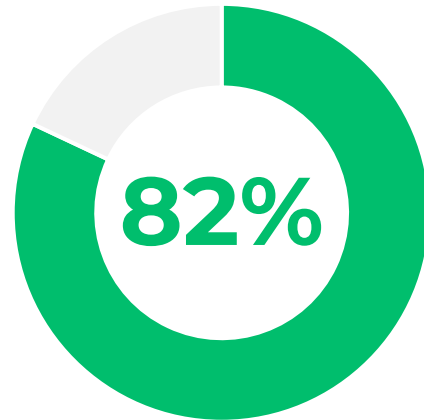


**86%** out of those who consider a free option also consider a paid option

## Top 5 Formats

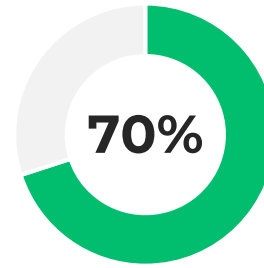
preferred program formats

- #1 Free self-guided learning
- #2 Free MOOCs
- #3 Paid online short courses
- #4 Paid online mini courses
- #5 Paid online postgraduate diploma

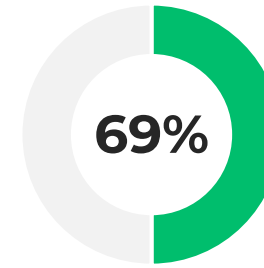


believe **online learning adoption will increase** in the near future

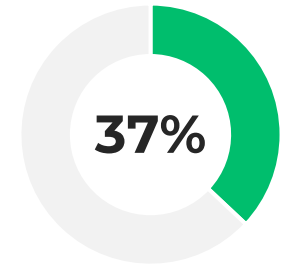
due to the current global developments...



claim their interest in pursuing **further education** has **increased**

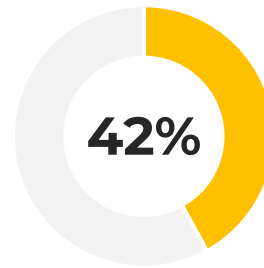


claim their interest in pursuing **online education** has **increased**

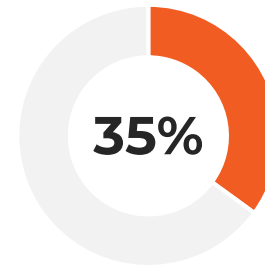


expect their **personal spend with education** to **increase** in the next 6 months

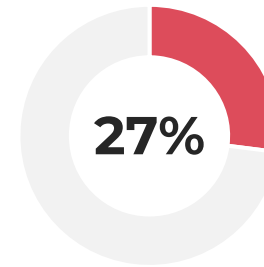
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**74%**

would consider either a hybrid or online approach

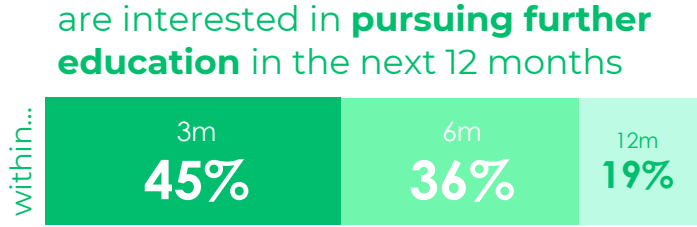


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | UAE

Learning about the future of online education | Wave #2

**160**  
RESPONDENTS

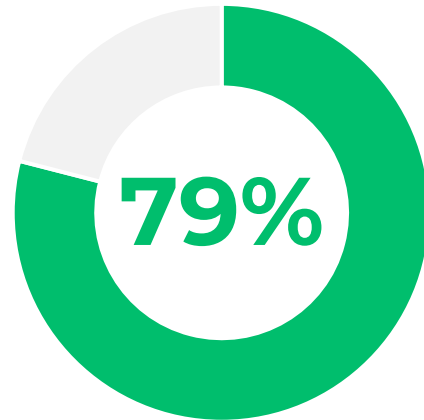


85% out of those who consider a free option also consider a paid option

## Top 5 Formats

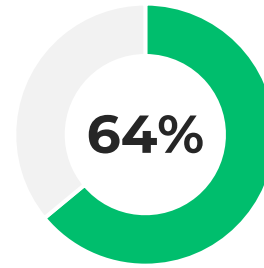
preferred program formats

- #1 Paid online short courses
- #2 Free self-guided learning
- #3 Paid online mini courses
- #4 Paid online postgraduate diploma
- #5 Paid MOOCs

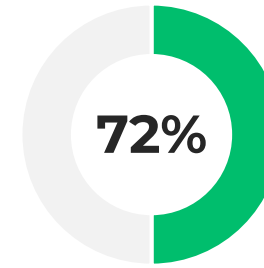


believe **online learning adoption will increase** in the near future

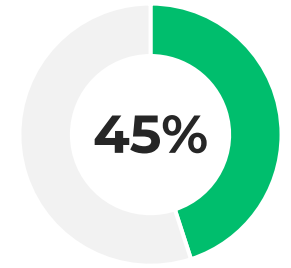
due to the current global developments...



claim their interest in pursuing **further education** has increased

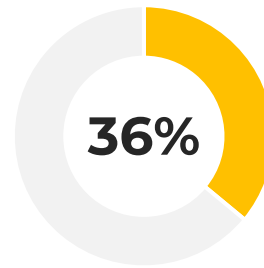


claim their interest in pursuing **online education** has increased

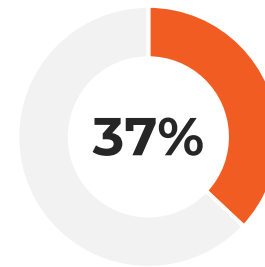


expect their **personal spend with education to increase** in the next 6 months

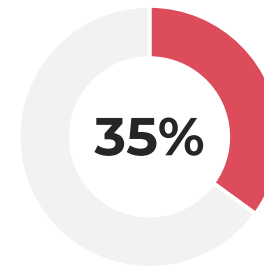
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**71%**

would consider either a hybrid or online approach

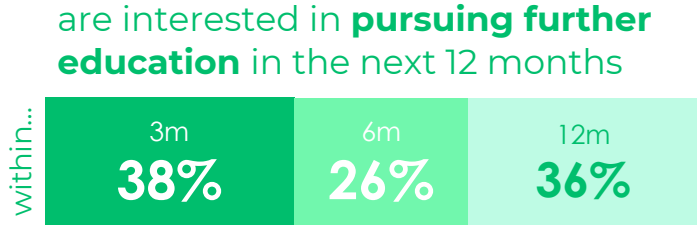


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | United Kingdom

Learning about the future of online education | Wave #2

**174**  
RESPONDENTS

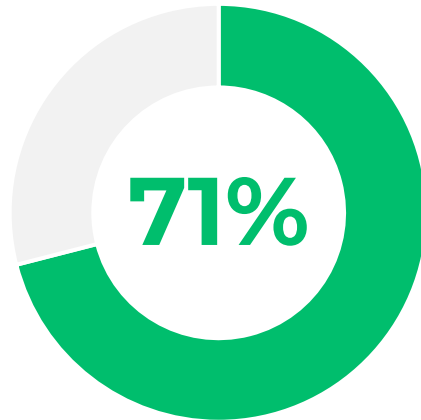


69% out of those who consider a free option also consider a paid option

## Top 5 Formats

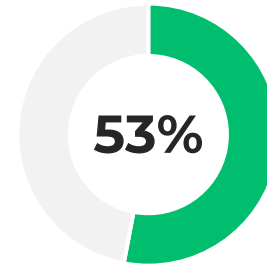
preferred program formats

- #1 Free self-guided learning
- #2 Free MOOCs
- #3 Paid online short courses
- #4 Paid online mini courses
- #5 Paid MOOCs

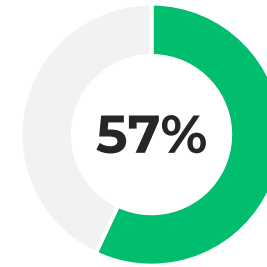


believe **online learning adoption will increase** in the near future

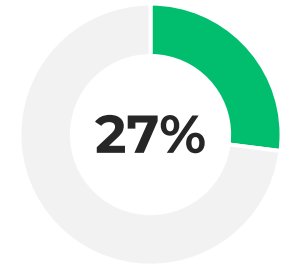
due to the current global developments...



claim their interest in pursuing **further education** has **increased**

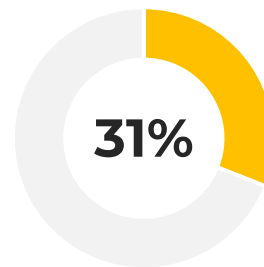


claim their interest in pursuing **online education** has **increased**

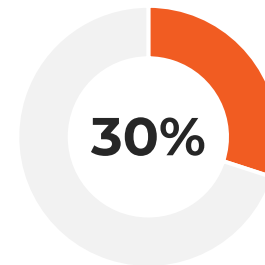


expect their **personal spend with education** to **increase** in the next 6 months

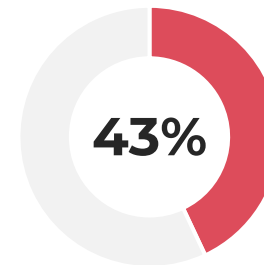
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**84%**

would consider either a hybrid or online approach

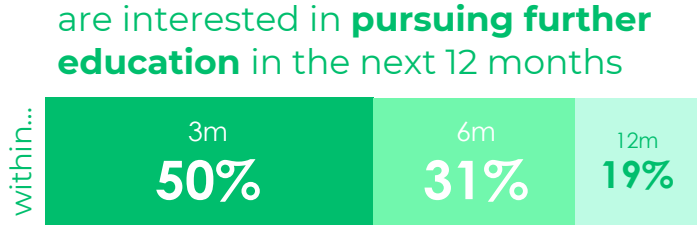


SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)

# Global Consumer Sentiment | United States

Learning about the future of online education | Wave #2

**310**  
RESPONDENTS

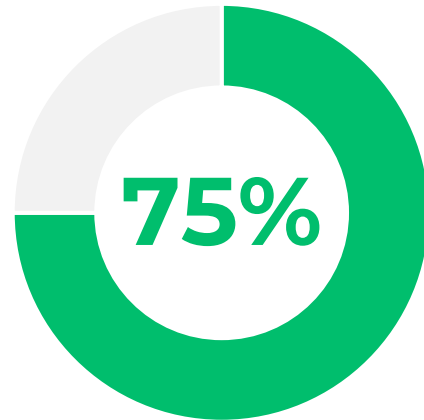


**92%** out of those who consider a free option also consider a paid option

## Top 5 Formats

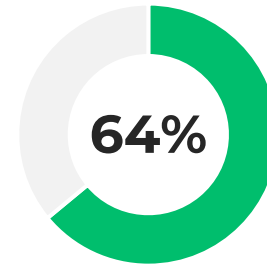
preferred program formats

- #1 Paid online mini courses
- #2 Free self-guided learning
- #3 Paid online postgraduate diploma
- #4 Paid online graduate, good 2<sup>nd</sup> tier university
- #5 Paid MOOCs

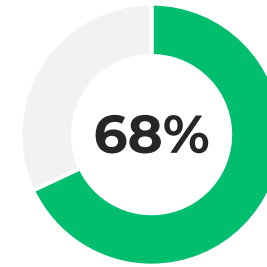


believe **online learning adoption will increase** in the near future

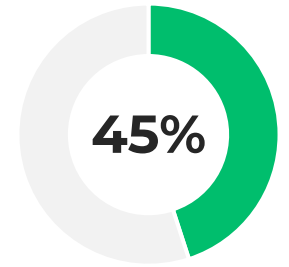
due to the current global developments...



claim their interest in pursuing **further education** has **increased**

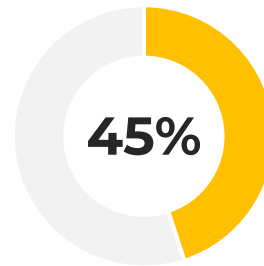


claim their interest in pursuing **online education** has **increased**

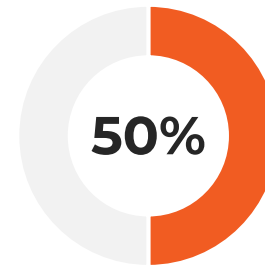


expect their **personal spend with education to increase** in the next 6 months

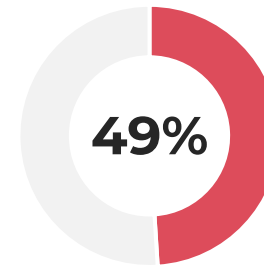
considered modalities



hybrid, mainly site-based



hybrid, mainly online



100% online

**86%**

would consider either a hybrid or online approach



SOURCE: EMERITUS Market Research and Customer Insights primary research (Jan/2021) – Data collected between Jan 14<sup>th</sup> and Jan 24<sup>th</sup>, 2021 - Total Sample (n = 2,132)



## APPENDIX | WAVE #1

# PROJECT SPECS

## Global Consumer Sentiment | May 2020

Data Collection, Target Audience and Sample

### DATA COLLECTION METHOD

Online questionnaire CASI on Qualtrics®

### INSTRUMENT

CASI – 7-minute survey

### DATA COLLECTION PERIOD

April 22<sup>nd</sup> through May 4<sup>th</sup>, 2020

### SAMPLING METHOD

Stratified Random Sampling.  
Online panel managed by Qualtrics®.

### TARGET AUDIENCE

- Living in one of the regions of interest (detailed in table).
- Age between 21 and 65 years old.
- Complete High School (20%) + complete Higher Education (80%).
- Interested in pursuing further education in the next 12 months.

# SAMPLE DISTRIBUTION

COUNTRY/REGION	Sample	Weight <sup>1</sup>
US	312	11.1%
UK	156	11.1%
LATAM <sup>2</sup>	156	11.1%
India	156	11.1%
Singapore	156	11.1%
Germany	156	11.1%
France	156	11.1%
China	156	11.1%
UAE	156	11.1%
<b>TOTAL</b>	<b>1,560</b>	<b>-</b>

<sup>1</sup> Weight was applied in order to all countries have the same representation.

<sup>2</sup> LATAM sample includes respondents from Argentina, Chile, Colombia, Mexico, and Peru, evenly distributed.

**thank you!**