



Research Advisory Group Report



E-learning User Study: Corporate Segment

Conducted by

Elearning! & Government Elearning! Magazines

July 2014

Sponsored By:



Executive Summary

The *Elearning!* Magazine Group, which includes *Elearning!* and *Government Elearning!* Magazines, produces annual industry studies to provide deeper insight into the application of enterprise learning and workplace technologies. This year's surveys included 408 respondents, of which 140 are public sector. And, 87% of the corporate respondents were subscribers to *Elearning!* Magazine. The balance are non-subscribers and community members. Within the subscriber respondents, all 100% have an active or planned enterprise-wide learning initiative underway.

Training Trends

- Investment in e-learning increased to \$4.9 million annually/respondent, up 9% over 2013. Meanwhile, the overall enterprise learning budget averaged \$6.4 million up slightly from 2013's \$6.2 million annually per respondent.
- NEW in 2014: Top business objectives for investing in learning were queried. Employee Engagement (68%) topped the list.
- Training priorities for 2014 have shifted slightly with product training taking 2nd spot behind Compliance, the perennial leader in training priorities.
- E-learning, virtual and blended learning continue to grow in adoption. 61% of training hours are being deployed outside the traditional instructor-led classroom. And, 48% of training hours are deployed via e-learning, blended or virtual classroom options- holding steady over 2013.
- In 2014 study, we queried learning and talent systems use and purchase plans, as well as e-learning solutions. Cloud-based LMSs are seeing high growth rates in 2014.
- For e-learning tools, the most highly used solutions remain to be: *E-learning Development Tools* (75%), *Web Conferencing Tools* (71%), *Project Management Tools* (55%), *Assessment & Testing Tools* (53%) and *Content Development Svcs* (53%).
- Highest on the "planning to add" list over the next 12 months are: *E-learning Development Tools* (30%); to include *Mobile Learning* at (31%) and *Social Networks* (21%).

Buying Roles and Trends

- Who makes the learning & workplace technologies decision?
- Who approves the purchase?
- What products are hot and which are not?

Download the complete report to learn these answers and more on our website at www.2Elearning.com/ under "Resources" and then "Research & White Papers."

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Methodology:

Elearning! Magazine Group, which includes *Elearning!* and *Government Elearning!* Magazines executed a 38-question survey of executives from corporate business, government and educational institutions. During the data collection period of January 22nd through April 1st, 2014, participants were contacted through an e-mail invitation with an embedded URL link to take the online survey. *Elearning!* and *Government Elearning!* Magazines compiled and tabulated the results of 408 respondents from our subscribers, community members and non-subscribers. This report summarizes the results of the “corporate segment” and provides a perspective of current and emerging e-learning trends, toolsets utilized, future purchase plans, as well as insight into the learning & workplace technologies decision-making process.

Survey Objectives:

- To provide a respondent profile based upon demographic data;
- To discover the respondents’ e-learning practices, toolsets utilized and future plans;
- To establish a general benchmark in practices against 2013 and public sector users; and
- To understand the decision-making roles within organizations for enterprise-wide learning solutions.

Respondent Profile:

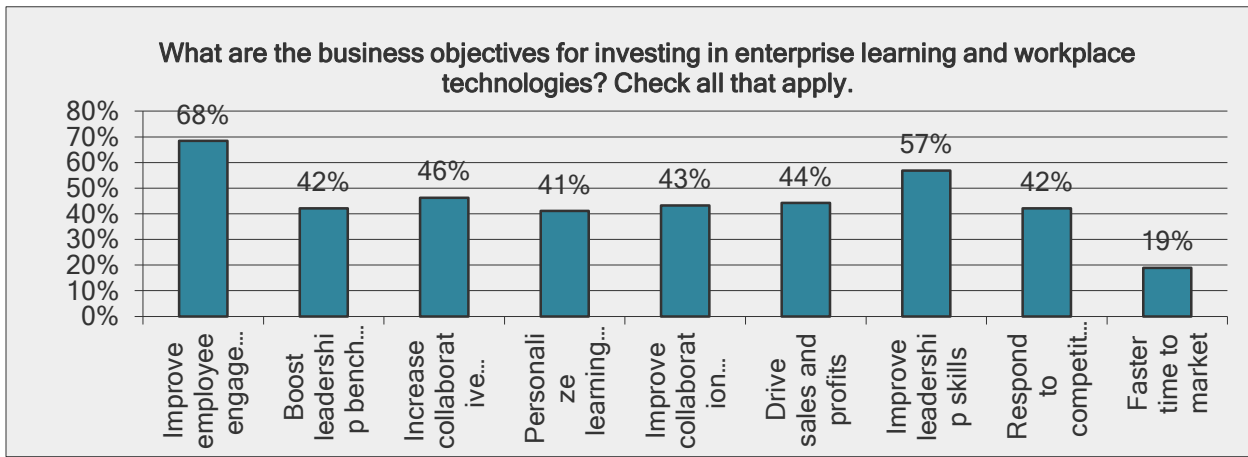
- All respondents are employed within corporations. (See Appendix 1)

	2014	2013	Trend
Corporate	100%	100%	
Healthcare/Pharmaceutical	22%	14%	+8%
Fin/Banking/Ins/RE/Legal	18%	17%	+1%
Manufacturing	13%	12%	+1%
Software/Web/High Tech Business Svcs	11%	17%	-6%
Consultants/Analysts/OOther Biz Svcs	7%	8%	-1%
Retail/Wholesale/Distributor	6%	11%	-6%
Telecom/Utilities/Communications	5%	7%	-2%
Oil/Gas/Mining	5%	1%	+4%
Hospitality/Travel/Entertainmt/Media	5%	8%	-3%
Transportation/Logistics	4%	2%	+2%
AEC	3%	3%	+0%

- Management titles accounted for 53% of the responses in 2014. 47% of respondents were non-management vs. 38% in 2014. 25% were in senior leadership roles of CEO and Executive Vice Presidents. (See Appendix 1)
- 67% of respondents serve in the HR, Talent or Training function. 25% lead business unit functions across IT, Sales, Manufacturing or Operations. (See Appendix 1)
- Respondents plan to invest \$4.9 million each on e-learning in 2014, another 9% increase over 2013, and a 4th straight year growth.

Enterprise Learning: Strategy

- NEW in 2014: Top business objectives for investing in learning & workplace technologies were queried. Improving Employee Engagement was the overwhelming leader at 68%.
- This New Math for learning is about engagement + collaboration = Innovation + profits.
- 46% indicate Increasing collaborative learning and improving collaboration across the enterprise (44%) as top business objectives.

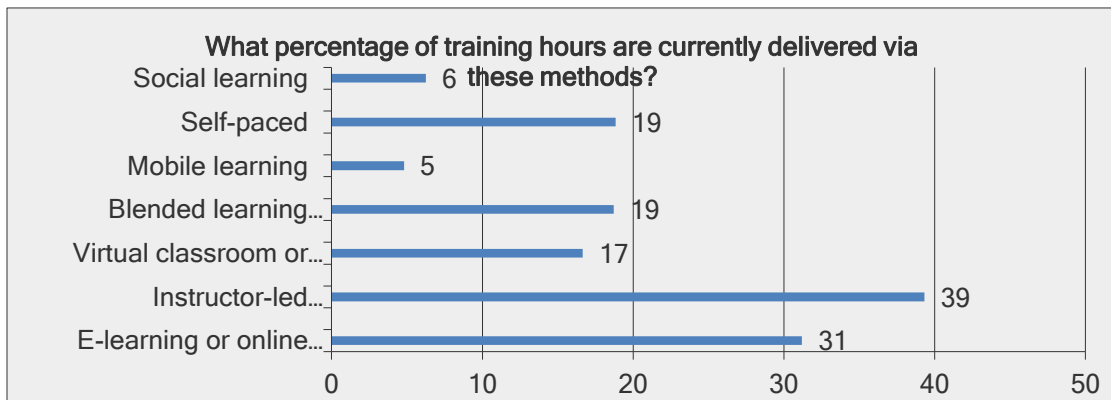


- NEW in 2014: Top business challenges impacting the organization was also queried. Surprisingly, respondents still are very tactical vs. strategic in perceptions naming limited resource & budget as their top challenge, rated 1.63 on a scale of 1 (being most impactful) to 6 (being least.) In contrast, globalization of workforce was rated at 4.85, yet leads in new initiatives that the enterprise embraces.



Enterprise Learning: Deployment

- Enterprise learning initiatives on the rise include: e-learning with 88% deploying; 34% reported global learning initiatives, up 42% over 2013; personalized learning at 29% (new to the list in 2014); extended enterprise at 19% up 12% in 2014. Declines were reported for mobile learning initiatives at 29%, down from 38% in 2013; 13% reported user-generated content activities down 39%; and 16% reported initiatives in social learning, down 44% from 2013. This may mean adoption of these solutions have already occurred in the enterprise.
- 61% of training hours are being deployed outside the traditional instructor-led classroom. 48% of training hours are deployed via e-learning, blended or virtual classroom options.
- 31% of training hours are deployed via e-learning, 17% via virtual classrooms, 19% blended and 6% social learning. A large 19% are self-paced programs down from 25% in 2013.

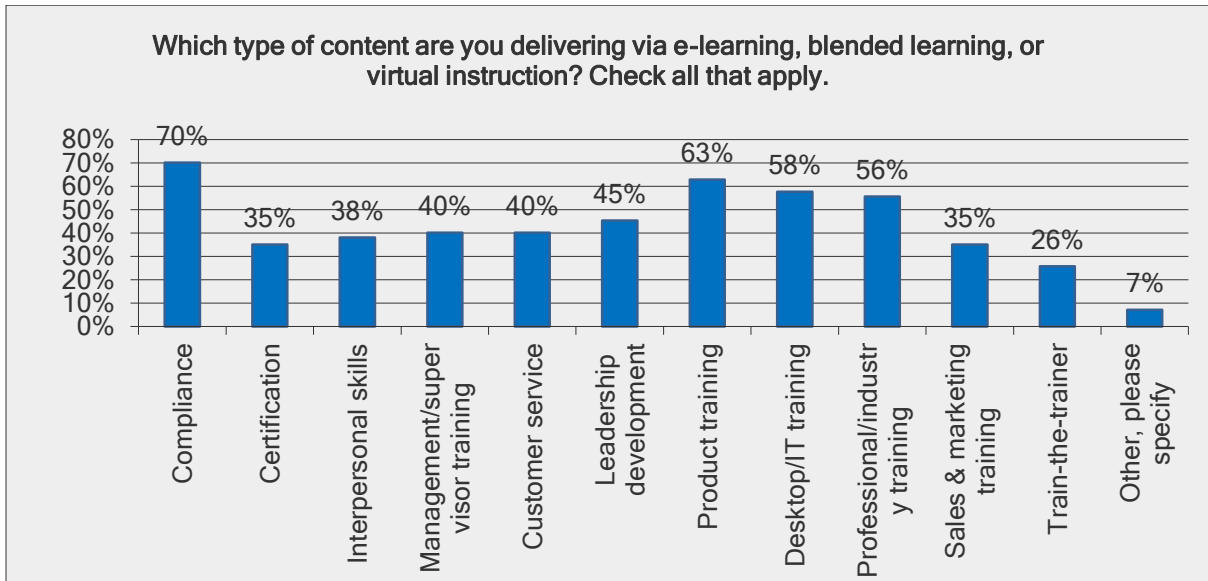


- Compliance leads as the most important training program being implemented via E-learning, Blended Learning, or Virtual Instruction. Product Training moved up 2 slots and Customer Service jumped 1 slot. Professional/Industry, Desktop/IT Training and Leadership Development rounded out the top 5 for 2014.

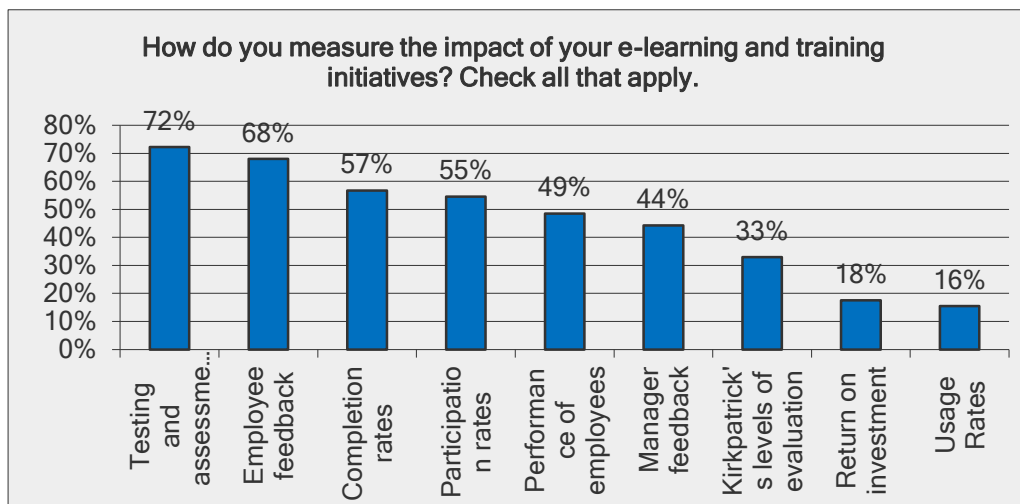
	2014	2013	Trend
Compliance	1 st	1 st	same
Product Training	2 nd	4 th	+2
Desktop/IT Training	3 rd	2 nd	-1
Professional/Industry	4 th	2 nd	-1
Leadership Development	5 th	6 th	same
Management/Supervisor	6 th	4 th	-2
Customer Service	6 th	7 th	+1
Interpersonal Skills	8 th	7 th	-1
Sales & Marketing	9 th	9 th	same
Certification	9 th	10 th	same
Train-the-Trainer	11 th	11 th	same

Enterprise Learning: Deployment

- Compliance (70%), Product Training (63%) and Desktop/IT Training (58%) and Professional/Industry Training (56%) lead in content delivered using e-learning, blended or virtual instruction.



- For the first time, *Testing & Assessments* (72%) is the top method of measuring learning. Employee feedback dropped to second place with 68% using. However, there is still much more to do as employee performance (49%) and Kirkpatrick methods are 5th and 7th on utilization.



E-learning Use: Tools & Purchase Plans

- Respondents use a full range of tools and solutions. In 2014, we queried learning & talent solutions and e-learning tools.
- The highest rate of growth (over installed base) among learning and talent management systems is: LMS-cloud (28%) and peer evaluation (29%) and Adaptive Learning solutions 5% and new this year.
- Cloud based solutions are impacting the deployment of enterprise solutions: LCMS usage down 40%, LMS Enterprise use down 22% and TMS Enterprise down 13%.
- Use rates have increased in areas focusing on internal talent development vs. reporting and tracking activities. Peer Evaluation is seeing rapid growth again this year with 27% using, a 29% increase over 2013. Performance Management sees a 5% increase and Career Development held steady.

Which of the following, if any, does your company currently use and/ or plan to purchase? Check all that apply.	2014 Use %	2013 Use %	Rate of Growth Base &
Learning Management System-Enterprise-based, behind the firewall	50%	64%	-22%
Learning Management System-Cloud or software as a service	41%	32%	28%
Learning Content Management System-Enterprise-based, behind the firewall	13%	33%	-40%
Learning Content Management System-Cloud or software as a service	14%	16%	-12%
Talent Management Suite-Enterprise-based, behind the firewall	20%	23%	-13%
Talent Management Suite-Cloud or software as a service	13%	17%	-14%
Applicant Tracking System	34%	41%	-17%
Recruitment Management System	35%	34%	3%
Career Development System	26%	26%	0%
Performance Management Software	41%	39%	5%
Compensation Management Software	20%	25%	-20%
Succession Management System	13%	16%	-18%
360 Degree/Peer Evaluation System	27%	21%	29%
Adaptive Learning	5%	n/r	100%

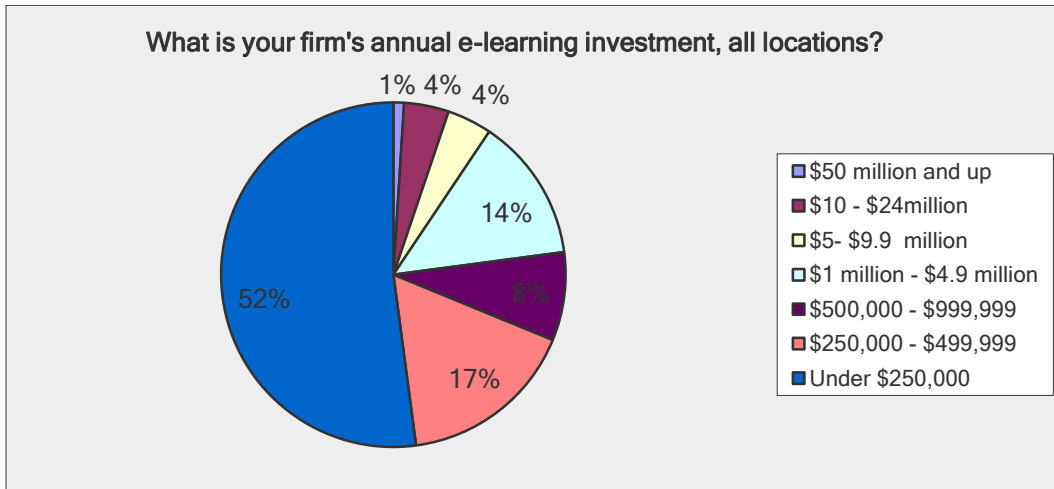
- *E-learning Development Tools* (75%), *Web Conferencing Tools* (71%), *Project Management Tools* (55%), *Assessment & Testing* and *Content Development* (53%) top the list of tools and solutions in current use. This is the first time *Content Development* reached the top usage list.
- From a planned purchase perspective, the top priorities have shifted to engagement oriented solutions: *Mobile Learning* at (35%); *Video Solutions* (31%), *Gamification* (23%) *Virtual Classroom* (27%), and *E-learning Tools* (23%). These plans are aligned with the Top Business Objectives discussed earlier. And, E-learning continues a steady pace as more training hours are migrating pull version push learning modalities.

E-learning Use: Tools & Purchase Plans

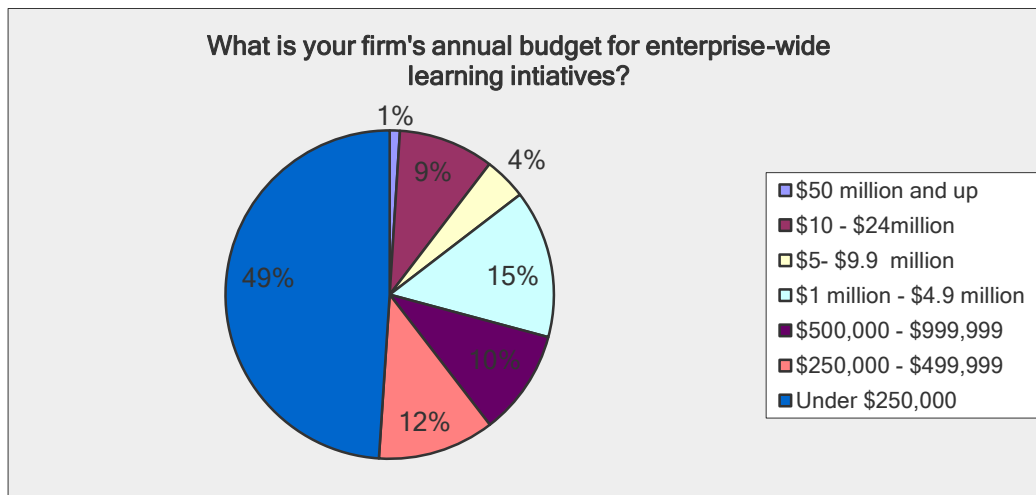
Which of the following tools or services do you currently use?	Currently Use	Purchase Planned	Growth Rate
Assessment and testing	53%	21%	40%
Content development tools	53%	19%	36%
Collaborative work spaces	36%	18%	50%
Consulting services	38%	7%	18%
Content development services	29%	12%	41%
Content rating tool	12%	12%	100%
E-learning development tools	75%	23%	31%
Gamification & rewards solutions	12%	23%	192%
Localization and translation services	21%	6%	29%
Personalized Learning	21%	19%	90%
Mobile learning	29%	35%	121%
Off-the-shelf content	49%	12%	29%
Online university content	19%	11%	58%
Outsourcing services	25%	7%	28%
Peer rating tool	11%	4	36%
Project management tools	55%	11%	20%
Presenter tools	49%	12%	24%
Social networks	36%	17%	47%
3D/simulations	19%	9%	47%
Video solutions	43%	31%	72%
Virtual events/classroom	45%	27%	60%
Virtual worlds	3%	3%	100%
Web conferencing	78%	17%	22%
Wikis, blogs or forums	42%	19%	45%

E-learning Use: Investment

- Respondents plan to invest \$4.9 million on e-learning in 2014, a 9% increase over 2013. The 4th straight year of healthy growth.

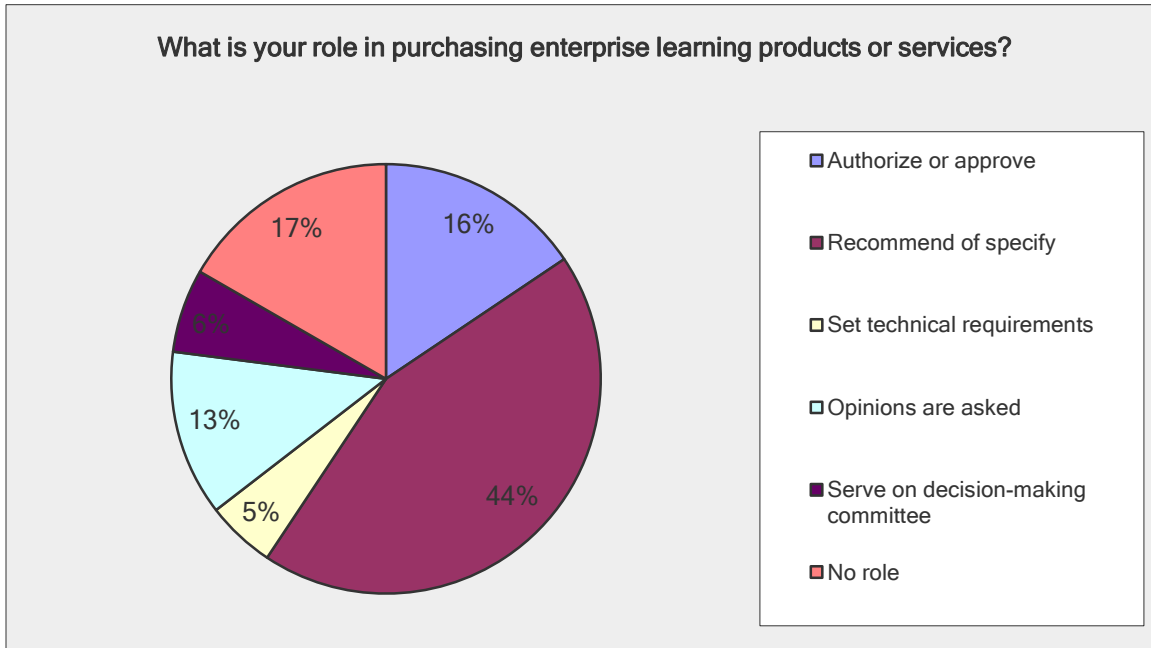


- Respondents invest \$6.4 million each annually on enterprise learning & workplace technology, slightly up from 2013's \$6.2 million.



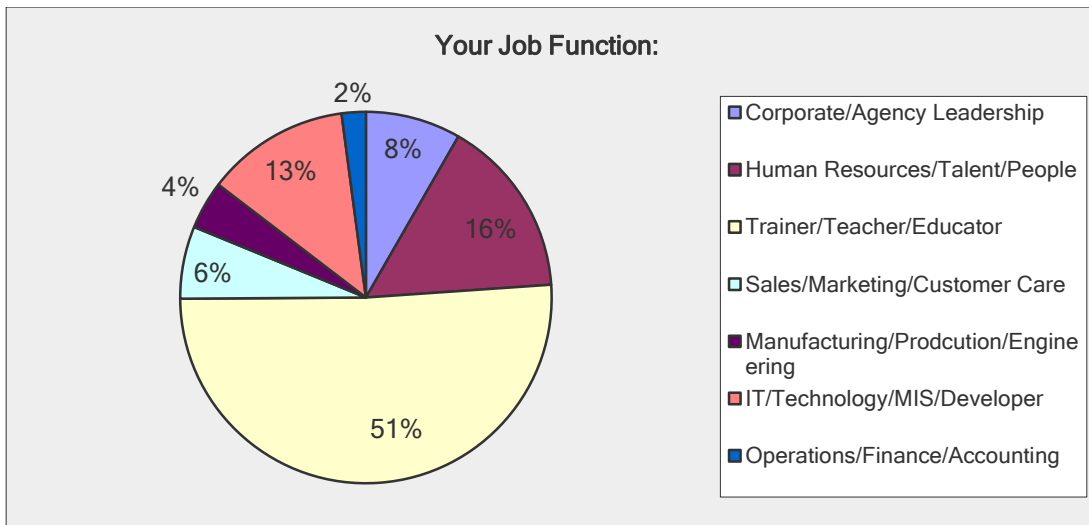
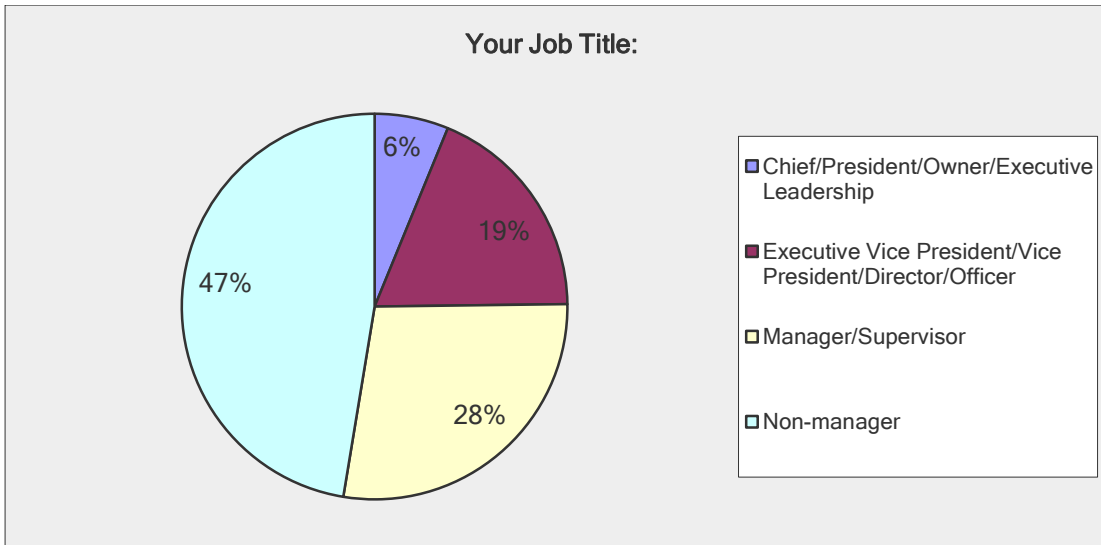
E-learning Use: Roles

- 83% of respondents reported a role in the purchase of enterprise learning products and/or services.

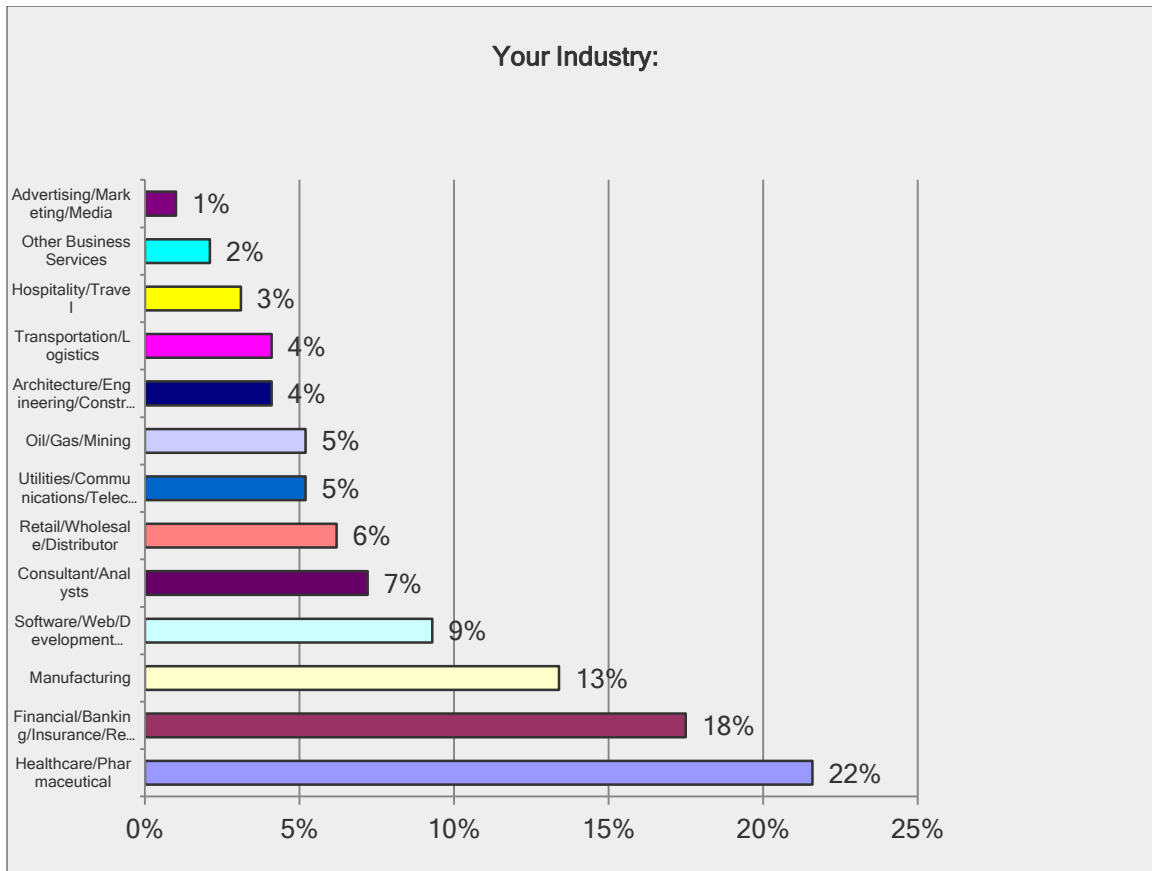


Appendix 1

Respondents Profile 2014:



Respondents Profile:





Sponsors

InterCall's award-winning Virtual Learning Environments provide organizations with communication and collaboration technologies that integrate and work together, making it easy to create, manage, search, share, track—and leverage—content. Learning leaders can share content with security and control, track and measure learner behavior, manage costs and performance to improve the learner experience and ROI.

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About the Authors

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