



E-learning User Study: Corporate Segment

Conducted by

Elearning! & Government Elearning! Magazines

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Executive Summary

In *Elearning!* and *Government Elearning!* Magazines' E-learning User Study, an overwhelming 93% of respondents have an active e-learning initiative. Of the 7% who do not, 100% plan to implement an initiative in the near future. E-learning investments are up 30% from 2009. However, the industry profile of users has changed dramatically from 2009, with service industries accounting for 81% of respondents. This study of 740 respondents provides insight into the application of e-learning, the future toolset required by enterprises, as well as the composition of the buying team.

Training Trends

- 69% of training hours are being conducted outside the traditional classroom-based, face-to-face format. Use of e-learning, blended or virtual methods has grown 10 percentage points, accounting for 54% of all training hours.
- Training priorities have shifted in 2010 content .Compliance still reigns #1. Customer Service (#2), Product Training (#4) and Professional/Industry (#5) training all moved up. Significant declines were reported for Desktop/IT Training and Interpersonal Skills. Compliance, Management/Supervisor training Train-the-trainer held position year-to-year.
- Respondents plan to invest 30% more on e-learning in 2010, averaging \$1.455 million each.

Product/Services Uses & Purchase Plans

- Respondents use a wide range of products and solutions. Utilization rates have increased from 2009 to 2010 for: Social Networks (+19%), Off-the-shelf Content (+17%) and Wikis, Blogs and Forums (+15%). The trend toward collaborative learning continues to grow. Consulting services are seeing the benefit of cutbacks, as well as more technology investments, contributing to increased reliance on their services.
- Products /services in highest demand in 2010 are: Mobile learning (35%), Wikis, blogs & forums (23%) Games, Knowledge portals and Social networks (20%). Three of five repeating in 2010: mobile, social networks and knowledge portals.

Buying Roles and Trends

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

Download the complete report to learn these answers and more.

Table of Contents

Methodology	4
Survey Objectives	4
Respondents Profile	4
E-learning Use: Current Deployment	5
E-learning Use: Tools & Purchase Plans.....	8
E-learning Use: Roles	11
Appendix 1: Respondents Profile Title & Industry	12
About the Authors	13

Charts & Figures

Chart 1: Respondents by Industry	4	Chart 6: Learning Measurement	7
Chart 2: Training Hours: E-learning/ Blended/Virtual	5	Chart 7: Tools/Services Used	8
Chart 3: Training Hours by Method	5	Chart 8: E-learning Budgets	9
Chart 4: Training Priorities: Content	6	Chart 9: Purchases Planned	10
Chart 5: Training Content Delivered: E-learning/Blended/Virtual	6	Chart 10: Buying Role	11

Methodology:

Elearning! and *Government Elearning!* Magazines executed a 21 question Web-based survey of executives from corporate business, government and educational institutions. During the data collection period of April 20th through May 9th, 2010, 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 the 740 respondents, 500 of whom completed the survey. This report summarizes the results of the Corporate segment and provides a perspective current and emerging e-learning trends, tools and future purchase plans. Insight into the decision-making process is also revealed.

Survey Objectives:

- To provide a respondent profile based upon demographic data,
- To discover the respondents' e-learning practices, tools and future plans,
- To obtain general benchmark in practices against 2009 and public sector users,
- To understand the decision-making and buying roles within organizations for e-learning solutions.

Respondent Profile:

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

	2010	2009	Trend
Corporate	100%	100%	
Fin/Banking/Ins/RE/Legal	21%	26%	-5%
Healthcare/Pharmaceutical	18%	16%	+2%
Manufacturing	10%	16%	-6%
Telecom/Utilities/Communications	7%	15%	-2%
High Tech Business Services	6%		
Retail/Wholesale/Distributor	9%	15%	-2%
Hospitality/Travel/Entertainmt/Media	4%		
Other Business Svs/Consultants	17%	12%	+5%
Transportation/Logistics	4%		+4%
AEC	3%		+3%
Oil/Gas/Mining	1%		+1%

- Management titles accounted for 64% of responses vs. 53% in 2009. Chief executives accounted for 12% of responses, and HR/Training/OD/E-learning VP, Director, Manager accounted for 35% of respondents. Other business unit managers represented 17% of the respondents vs. 5 % in 2009. (See Appendix 1)
- 35% of respondents were non-management vs. 47% in 2009. 27% of the respondents were within the HR/Trainer/Developer/Ed category. IT support, other administrative (3%) and consultant/analyst (5%) followed. (See Appendix 1)
- Respondent's annual e-learning budget is \$1.455 million on average, up 30% from \$1.115 million in 2009.

E-learning Use: Current Deployment

- 93% of respondents have a current e-learning initiative. Of the 7% that do not, 100% plan to institute one in the future.
- Of the non-users of e-learning, 20% plan to institute a formal initiative over the next 12 months, 55% within 24 months, and 25% within 60 months.
- 80% of e-learning is deployed in multiple corporate locations; 40% multinational and 40% in multiple U.S. locations. 20% are deployed in one location.
- E-learning, blended learning and virtual instruction accounts for 54% of total training hours, up from 44% in 2009.

4. What percentage of the company's training hours are currently hosted via e-learning, virtual classroom or blended learning methods?			
	2010	2009	Trend
100%	6%	4%	+2%
90-99%	6%	9%	-2%
75-89%	18%	11%	+7%
50-74%	24%	18%	+6%
25-49%	26%	20%	+6%
5-24%	15%	22%	-7%
Under 5%	7%	15%	-8%

- 69% of training hours are hosted outside the traditional classroom. Training hours by method:

	2010
Instructor-led classroom- based	41%
E-learning or online	39%
Blended learning	28%
Self-paced	26%
Virtual classroom/online meetings	23%
Social learning	9%

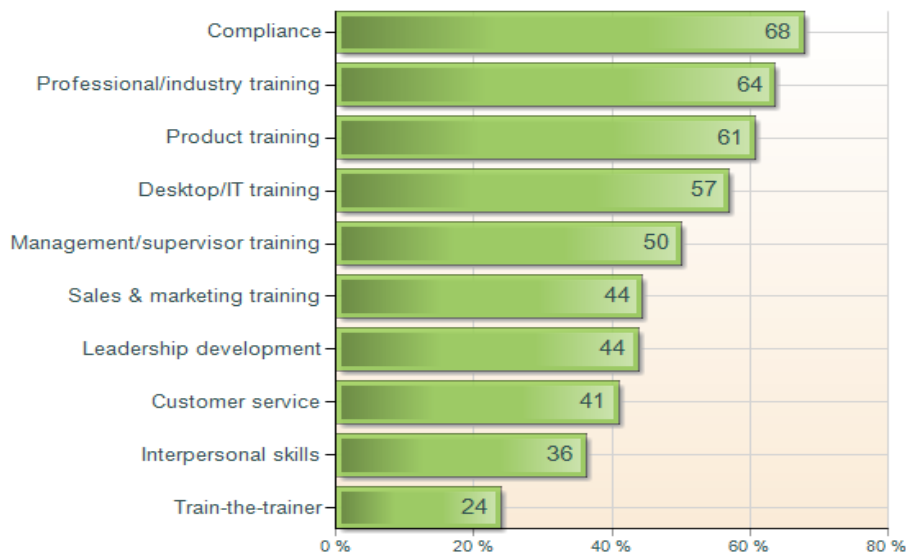
E-learning Use: Current Deployment

- Compliance leads as the most important training program currently being implemented. Customer Service and Product Training jump in priorities for 2010.

	2010	2009	Trend
Compliance	1 st	1 st	same
Customer Service	2 nd	4 th	+2
Management/Supervisor	3 rd	3 rd	same
Product Training	4 th	6 th	+2
Professional/Industry	5 th	8 th	+3
Leadership Development	6 th	5 th	-1
Sales & Marketing	7 th	9 th	+2
Interpersonal Skills	8 th	2 nd	-6
Desktop/ IT Training	9 th	7 th	-2
Train-the-Trainer	10 th	10 th	same

- Compliance (68%), product training (64%) and professional education (61%) lead in content delivered using e-learning, blended or virtual instruction.

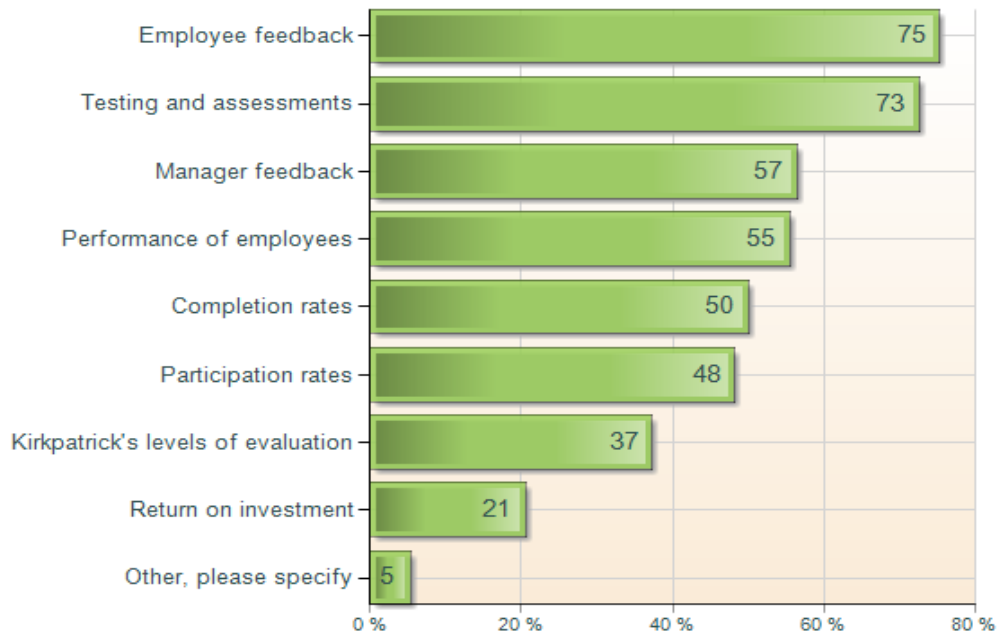
Which type of content are you delivering via e-learning, blended learning or virtual instruction? Check all that apply.



E-learning Use: Current Deployment

- Employee feedback (75%) and testing (73%) are top measurements of learning.

How do you measure the impact of your e-learning and training initiatives? Check all that apply.



E-learning Use: Tools & Purchase Plans

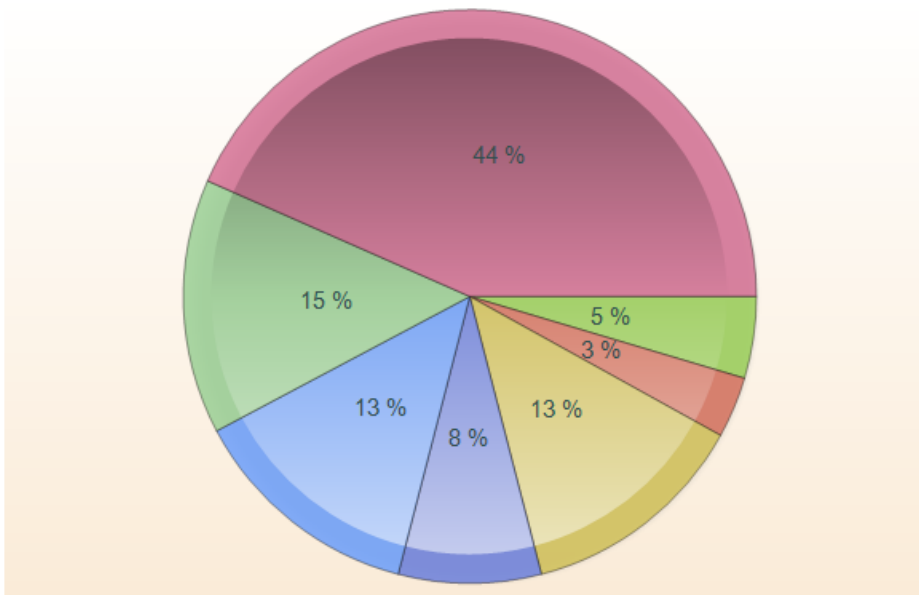
- Respondents use a full range of solutions. Significant growth from 2009 usage rates was reported for: Social Networks (+19%), Off-the-shelf Content (+17%) and Wikis, Blogs and Forums (+15%). Decline was reported for Virtual Worlds (-3%). (Note: Gaming/Simulations and 3D were separated in 2010, and stats are not comparable.)

Use of Tools: Range 2009 vs. 2010

	Currently Use 2010	Currently Use 2009	Trend
Assessment and testing	72%	72%	0%
Content development tools	81%	73%	8%
Collaborative work spaces	62%	54%	8%
Consulting services	38%	38%	0%
Content development services	42%	40%	2%
E-learning development tools	82%	73%	9%
Gaming solutions	18%	43%	-25%
Localization and translation services	25%	20%	5%
Knowledge portals	50%	45%	5%
Mobile learning	18%	10%	8%
Off-the-shelf content	61%	44%	17%
Online university content	31%	na	na
Outsourcing services	30%	na	na
Project management tools	59%	54%	5%
Presenter tools	73%	66%	7%
Rapid development solutions	60%	60%	0%
Social networks	48%	29%	19%
3D/simulations	20%	na	na
Video solutions	60%	na	na
Virtual events/classroom	64%	na	na
Virtual worlds	6%	10%	-4%
Web conferencing	85%	72%	13%
Wikis, blogs or forums	55%	40%	15%

E-learning Use: Tools & Purchase Plans

- Respondent's annual e-learning budget is \$1.455 million on average, up 30% from \$1.115 in 2009.



- Products /services in highest demand in 2010 are: Mobile learning (35%), Wikis, blogs & forums (23%) Games, Knowledge portals and Social networks (20%).
- Virtual worlds are used by only 6% of respondents, yet 15% plan to purchase it, a 250% increase. 3D/simulations (20% use/19%buy/ 95% up) and games (18% use/20% buy/ 111% up) indicating significant growth across the category.

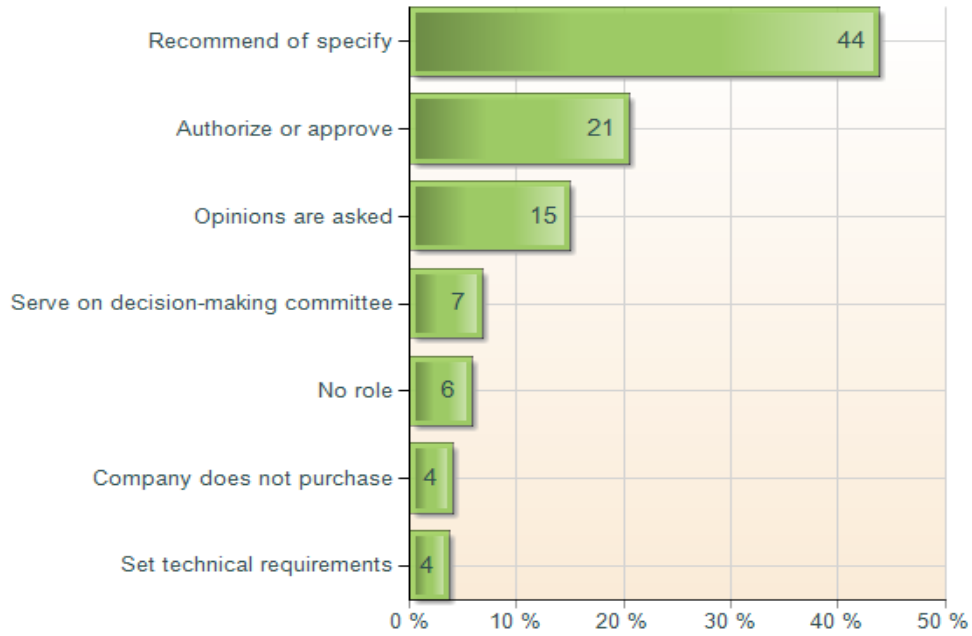
E-learning Use: Tools & Purchase Plans

7. Which best describes your use of these tools or services for employee development?			
	Currently Use	Plan to purchase	% increase
Assessment and testing	72%	12%	16%
Content development tools	81%	10%	12%
Collaborative work spaces	62%	16%	26%
Consulting services	38%	14%	37%
Content development services	42%	11%	26%
E-learning development tools	82%	10%	12%
Gaming solutions	18%	20%	111%
Localization and translation services	25%	13%	52%
Knowledge portals	50%	20%	40%
Mobile learning	18%	35%	194%
Off-the-shelf content	61%	15%	25%
Online university content	31%	13%	42%
Outsourcing services	30%	14%	47%
Project management tools	59%	12%	20%
Presenter tools	73%	9%	12%
Rapid development solutions	60%	11%	18%
Social networks	48%	20%	42%
3D/simulations	20%	19%	95%
Video solutions	60%	17%	28%
Virtual events/classroom	64%	18%	28%
Virtual worlds	6%	15%	250%
Web conferencing	85%	10%	12%
Wikis, blogs or forums	55%	23%	42%

E-learning Use: Roles

- 90% of respondents report a role in the purchase of e-learning products and/or services.

What is your role in the e-learning products or services?



Respondents by Title:

20. Your Title:	
Corporate/Executive/Senior Management	11%
HR/Training/Performance/Development VP, Director, Manager	31%
Sales/Marketing/Operations/Financial VP, Director, Manager	5%
IT/MIS/Technical Management	2%
HR/Trainer/Educator/Professor/Developer Non-Management	24%
Program/Project Leader or Manager	8%
IT/MIS/Technical Support	1%
Other Administrative Non-Management	2%
Consultant/Analyst	5%
Other, please specify	12%
Total	100%

Respondents by Industry:

20. Your Industry:	
Financial/Banking/Insurance/Real Estate/Legal	21%
Healthcare/Pharmaceutical	18%
Manufacturing/Processing	10%
Retail/Wholesale/Distributor	9%
Other Business Services	9%
Utilities/Communications/Telecom	7%
Consultant/Analysts	8%
High Tech Business Services	6%
Transportation/Logistics	4%
Architecture/Engineering/Construction	3%
Advertising/Marketing/Media	2%
Hospitality/Travel/Entertainment	2%
Oil/Gas/Mining	1%

About the Authors

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