



# E-learning User Study: Public Sector 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 88% of respondents have an active e-learning initiative. Of the 12% who do not, 100% plan to implement an initiative in the near future. This study reviews 200 public sector respondents, out of 740 surveyed, and provides insight into the application of e-learning, the future toolsets required by the public sector, as well as the composition of the buying team. For the purposes of this analysis, public sector includes government entities, associations and non-profit organizations, and educational institutions.

### Training Trends

- 50% of training hours are being conducted outside the traditional classroom-based, face-to-face format. E-learning accounts for 38% of all training hours, a year-to-year increase of 41%. Virtual classroom accounts for 16% of hours, a 38% increase. Blended (22%) and Self-paced (31%) have declined 15% and 6% respectively. Social learning held at 11%. This trend toward more virtual online training came at the expense blended and less engaging self-paced programs.
- Training priorities have shifted in 2010. Compliance fell to #2 while Customer service training jumped 4 levels to #1 (from #5) priority in 2010. Professional/Industry (#3) and Interpersonal skills (#5) jumped up from #4 and #9, while Job skills dropped one to #4 from #3 in 2009. Train-the trainer (#6) moved up from #9. These trends indicate a priority to build capabilities across the front line workforce.
- Respondents' investments remained stable at \$3.0 million in 2010.

### Product/Service Use & Purchase Plans

- Respondents use a wide range of learning technologies and solutions. Significant growth is reported for Wikis, Blogs and Forums (+16 points), Web Conferencing (+13 points), Off-the-shelf Content (+12 points) and Project Management Tools (+10 points). Given the migration to virtual online learning, these enabling technologies and solutions reflect this growing appetite for virtual learning.
- Products and services with highest plans to purchase are: Mobile learning (37%), Knowledge portals (23%) and Games (22%). Virtual worlds are use by only 14% of respondents, yet 20% plan to purchase it, representing a 143% increase. Mobile learning (24% use/37%buy/154% up) and games (19% use/22% buy/ 116% up) indicating significant growth across the category.

### Buying Roles and Trends

Who makes the e-learning decision? Who approves the purchase? Which products are hot and which are not? Download the complete report to learn these answers and more.

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**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 23<sup>rd</sup>, 2010 through May 9<sup>th</sup>, 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, 200 of whom represented the public sector. This report summarizes the results of the Government segment and provides a perspective on 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 private sector users,
- To understand the decision-making and buying roles within organizations for e-learning solutions.

**Respondent Profile:**

- All respondents are employed within the public sector.

	2010	2009	Trend
<b>Public Sector</b>	<b>100%</b>	<b>100%</b>	
Federal Government (Non-Military)	19%	29%	-10%
Military/Defense Contractor	21%	13%	+8%
State/County/Local Government	13%	28%	-15%
K-12 Education	16%	6%	+10%
Post-secondary Education	10%	13%	-3%
Association/Non-Profit Organization	21%	11%	+10%

- Management titles accounted for 55% of responses vs. 66% in 2009. Executive leadership accounted for 14% of responses, and HR/Training/Development/Workforce, Management accounted for 24% of respondents. Administrative/Technology/Financial Management represented 17% of the respondents. Other including Consultants/Analysts/ Media accounted for 7% of responses. (See Appendix 1)
- 38% of respondents were non-management vs. 34% in 2009. 38% of the respondents were within the HR/Trainer/Developer/Ed category. Other/Consultant/Analyst/Media followed at 7%. (See Appendix 1)
- Respondent’s annual e-learning budget is \$3.0 million on average, virtually flat with 2009.

## E-learning Use: Current Deployment

- 87% of respondents have a current e-learning initiative. Of the 13% that do not, 100% plan to institute one in the future.
- Of the non-users of e-learning, 44% plan to institute a formal initiative over the next 12 months, 22% within 24 months, and 34% within 60 months.
- 67% of e-learning is deployed in multiple corporate locations; 32% multinational and 35% in multiple U.S. locations. 33% are deployed in one location.
- E-learning, blended learning and virtual instruction accounts for 43% of total training hours, up from 41% 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%	9%	8%	+1
90-99%	4%	8%	-4
75-89%	10%	9%	+1
50-74%	18%	12%	+6
25-49%	18%	17%	+1
5-24%	28%	23%	+5
Under 5%	13%	23%	-10

- 50% of training hours are hosted outside the traditional classroom. Training hours by method:

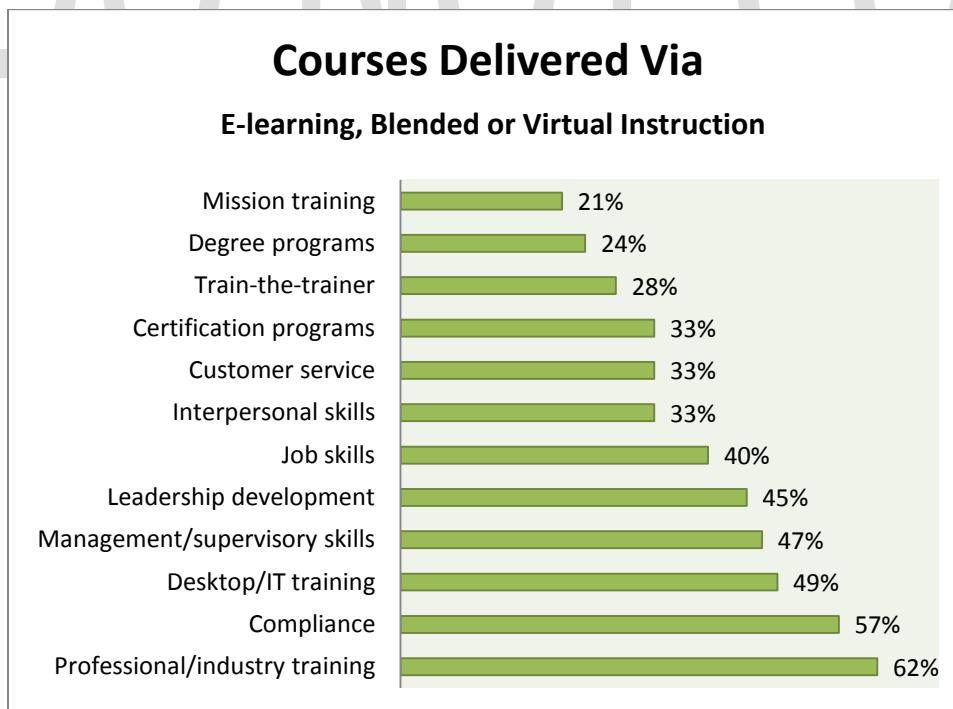
	2010
Instructor-led classroom-based	50%
E-learning or online	38%
Blended learning	22%
Self-paced	31%
Virtual classroom/online meetings	22%
Social learning	11%
Simulation or gaming	9%
3D Environments	2%

## E-learning Use: Current Deployment

- Training Priorities: Customer service jumped to #1 in 2010, just ahead of perennial favorite, Compliance training. Customer service, Interpersonal skills and train-the-trainer saw the highest increases, indicating a priority to build capabilities across the front line workforce.

	2010	2009	Trend
Customer Service	1 <sup>st</sup>	5 <sup>th</sup>	+4
Compliance	2 <sup>nd</sup>	1 <sup>st</sup>	-1
Professional/Industry	3 <sup>rd</sup>	4 <sup>th</sup>	+1
Job Skills	4 <sup>th</sup>	2 <sup>nd</sup>	-2
Interpersonal Skills	5 <sup>th</sup>	9 <sup>th</sup>	+4
Train-the-Trainer	6 <sup>th</sup>	10 <sup>th</sup>	+4
Mission Training	7 <sup>th</sup>	8 <sup>th</sup>	+1
Desktop/ IT Training	8 <sup>th</sup>	6 <sup>th</sup>	-2
Management/Supervisor	9 <sup>th</sup>	3 <sup>rd</sup>	-6
Leadership Development	10 <sup>th</sup>	7 <sup>th</sup>	-3

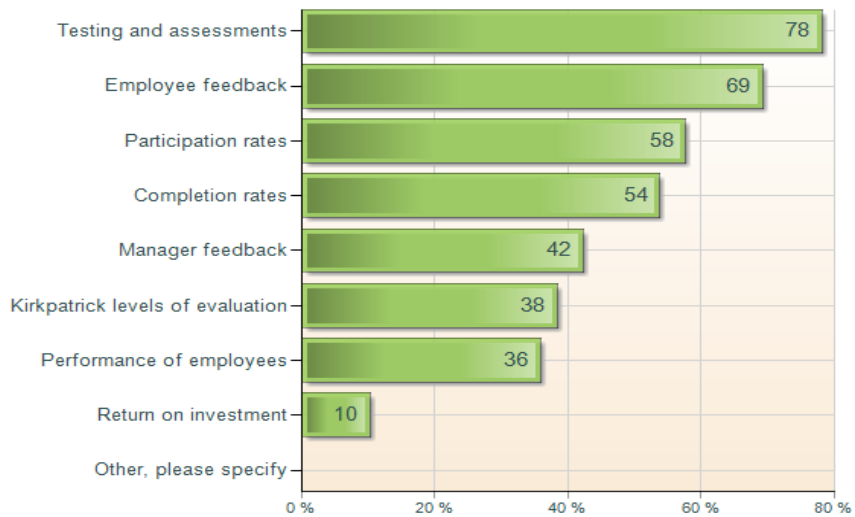
- E-learning Delivered Training by Content: Job skills (62%), professional /industry training (61%), and Compliance (56%) lead in content delivered using e-learning, blended or virtual instruction.



## E-learning Use: Current Deployment

- Learning Measurement: Testing (78%) and employee feedback (69%) are top methods used to measure learning.

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



## E-learning Use: Tools & Purchase Plans

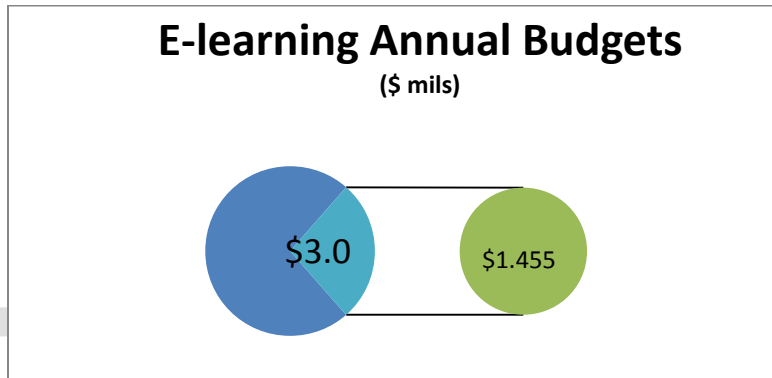
- Respondents use a full range of solutions. Significant growth from 2009 usage rates was reported for: Wikis, Blogs and Forums (+16 points), Web Conferencing (+13 points), Off-the-shelf Content (+12 points) and Project Management Tools (+10 points). Declines were reported for Knowledge Portals (-6 points) and Consulting Services (-3 points) . (Note: Gaming/Simulations and 3D were separated in 2010, and stats are not comparable.NA indicated data not collected in 2009)

### Use of Tools: Range 2009 vs. 2010

	Currently Use 2010	Currently Use 2009	Trend (pts)
Assessment and testing	64%	54%	10
Content development tools	74%	68 %	6
Collaborative work spaces	58%	52 %	6
Consulting services	30%	33 %	-3
Content development services	39%	35 %	4
E-learning development tools	70%	68 %	2
Gaming solutions	19%	49 %	-39
Localization and translation services	18%	14 %	4
Knowledge portals	40%	46 %	-6
Mobile learning	24%	17%	7
Off-the-shelf content	52%	40 %	12
Online university content	34%	na	na
Project management tools	56%	46 %	10
Presenter tools	67%	63 %	4
Rapid development solutions	46%	46 %	0
Social networks	43%	34%	9
3D/simulations	46%	49	-3
Video solutions	59%	na	na
Virtual events/classroom	57%	na	na
Virtual worlds	14%	6 %	8
Web conferencing	72%	59%	13
Wikis, blogs or forums	57%	41 %	16

## E-learning Use: Tools & Purchase Plans

- Respondent's annual e-learning budget is \$3.0 million on average, flat with 2009. However, corporate investments are increasing 30% over 2009, averaging \$1.455 million/respondent annually.



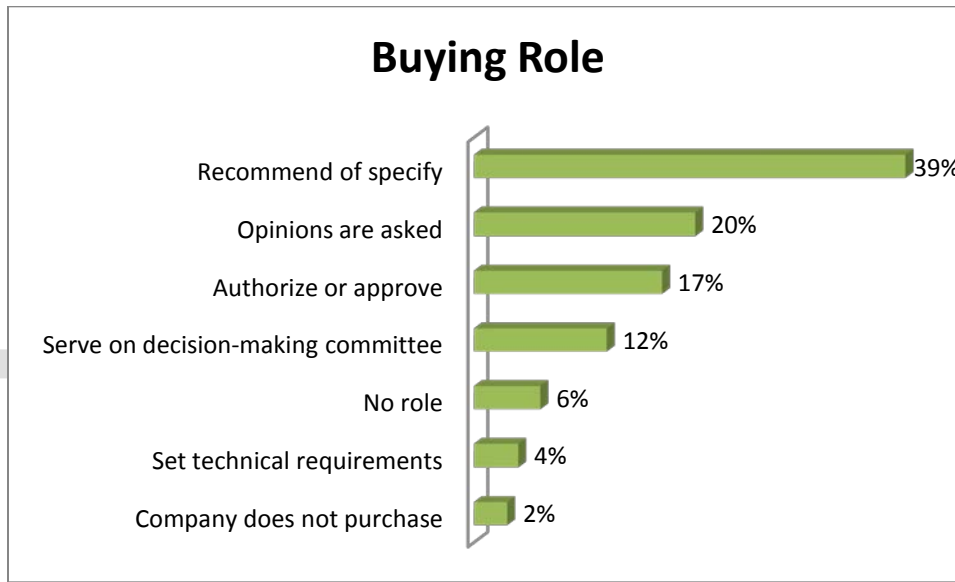
- Purchase Plans: Products /services in highest demand in 2010 are: Mobile learning (37%), Knowledge portals (23%) and Games (22%). Virtual worlds are used by only 14% of respondents, yet 20% plan to purchase it, a 143% increase. Mobile learning (24% use/37%buy/154% up) and games (19% use/22% buy/ 116% 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	64%	13%	20%
Content development tools	74%	13%	18%
Collaborative work spaces	58%	19%	33%
Consulting services	30%	12%	40%
Content development services	39%	17%	44%
E-learning development tools	70%	15%	21%
Gaming solutions	19%	22%	116 %
Localization and translation services	18%	15%	83%
Knowledge portals	40%	23%	58%
Mobile learning	24%	37%	154 %
Off-the-shelf content	52%	11%	21%
Online university content	34%	14%	41%
Project management tools	56%	14%	25%
Presenter tools	67%	11%	16%
Rapid development solutions	46%	18%	39 %
Social networks	43%	18%	42 %
3D/simulations	46%	21%	46 %
Video solutions	59%	18%	31 %
Virtual events/classroom	57%	21%	37 %
Virtual worlds	14%	20%	143 %
Web conferencing	72%	17%	24 %
Wikis, blogs or forums	57%	24%	42 %

## E-learning Use: Roles

- Buying Roles: 92% of respondents report a role in the purchase of e-learning products and/or services.



## Respondents Profile

## Appendix 1

### Respondents by Title:

<b>20. Your Title:</b>	
Executive Leadership (Dept/Agency, Secretary, Division Head/Manager, District Superintendent, Site Administrator, Chief)	8%
Legislative Leadership (Director, Manager, Supervisor, Policy/Public Affairs/Legal)	6%
Human Resources Management (Training, Development, Workforce)	24%
Administrative & Operations Management (Support Administrator, Logistics/Program/Project)	11%
Technology Management (IT/MIS/Facilities)	5%
Financial Management (Acquisition/Procurement/Contracts)	1%
Trainer/HR Non-Management (Instructor, Web Developer, Generalist)	38%
Other/Consultant/Media	7%
<b>Total</b>	<b>100%</b>

### Respondents by Industry:

<b>20. Your Industry:</b>	
Federal Government (Non-Military)	19%
Military/Defense Contractor	21%
State/County/Local Government	13%
K-12 Education	16%
Post-secondary Education	10%
Association/Non-Profit Organization	21%

## **About the Authors**

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