March 2005

Current Trends in e-Learning Research Report

ANALYSIS AND COMMENTARY BY JOE PULICHINO

In the past twelve months our community has seen continued, sustained growth in the deployment of e-Learning initiatives in large and small organizations of every type: corporate, higher education, government and military, and non-profits. We have also witnessed significant evolution in e-Learning practice as improvements and innovations in design and delivery capabilities have led to more complex, more sophisticated and more far-reaching programs. The purpose of this *Guild* Research Report is to present a series of snapshots that capture certain key trends in e-Learning, as reported by *The eLearning Guild* Members and Associates through their participation in the ten *Guild* Research surveys conducted in 2004.

Throughout the year these surveys and their accompanying *Guild* Research Reports have kept a finger on the pulse of our community and, if nothing else, have demonstrated the variability and dynamism of the work of e-Learning. Each of the surveys and reports focuses on a particular area of e-Learning practice, and in themselves provide valuable indicators of what's going on out there in our Members' and Associates' organizations. We encourage you to look into each of them as they suit your particular area of interest or address the information needs of your job function. Truly, there is a wealth of data for all in the *Guild* Research archives.

Even so, we thought that we might derive additional value by stepping back and looking at the big picture that these surveys and reports paint for us. So, we produced this special report by culling all the surveys' data and looking for connections and common trends in the hope that broad patterns would emerge. Indeed, some interesting themes did present themselves. Naturally, with ten lengthy surveys and a participation level of over 4,000 respondents, there are many ways we could have "sliced and diced" the data. We concede, therefore, that many other themes could be uncovered and explored and we hope that *Guild* Members and Associates will do so for themselves in informal discussions around the water cooler, or during formal conferences and online events sponsored by the *Guild*.

For this report we chose three themes that seemed to jump out when we connected some of the dots across all ten surveys. These themes are: 1) the learn-

© 2005 The eLearning Guild. All rights reserved. http://www.eLearningGuild.com

Page Guide to the Survey

Continued from page 1

ing experiences of our survey respondents; 2) evolving trends in e-Learning design and delivery practices, and 3) the current state of measuring e-Learning. In reading this report, we trust that you will come to some of your own conclusions. In the course of our own work on this report, we found three central truths about current trends in e-Learning:

- ***The professionals working in the field of e-Learning who responded to our surveys are quite savvy and conscious when it comes to their own learning and how that learning happens.***
- ***e-Learning design and delivery is evolving in a variety of ways to significant new levels of adoption, complexity and sophistication.***
- ***When it comes to the measurement of e-Learning, especially in regard to its impact on business results, our community still has a long way to go.***

Your comments and feedback on this report are most welcome and we hope it adds to your understanding of the current state of the practice of e-Learning. To provide feedback on this *Guild* Research Report, go to www.eLearningGuild.com and click on the feedback box. In the subject line of your email message write "Guild Research."

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

The eLearning Guild Research Program

The eLearning Guild has been conducting research in the field of e-Learning since August 2001 when it published the *Synchronous Online Learning Technology Survey*. Since then we have conducted over 75 surveys, reports, and polls all of which have been archived on *The eLearning Guild* website.

The eLearning Guild Research Committee

Guild Research is driven by the Research Committee which is made up of *Guild* Members who volunteer their time to assist with the selection of survey topics, composition of the survey instruments, and the analysis and commentary included with each report. Committee Members represent the broad spectrum of the *Guild* membership as a whole, and include managers, instructional designers, course developers, instructors, and consultants from both the vendor and end-user communities. A list of the current members of the Research Committee is included on the last page on this report.

Surveys

Guild Research surveys are designed and developed by the Research Committee. Each year we compile an extensive list of survey topics which we think will be of interest and value to *Guild* Members and Associates, and then narrow them down to create a schedule, usually one survey per month. Often, we use the surveys themselves as ways of collecting data on what survey topics and questions are most appealing to the *Guild* community. We also solicit participants at *Guild* events to get their opinions and preferences.

Guild surveys are open to *Guild* Members and Associates as well as to visitors to the *Guild* Web site (www.eLearningGuild.com). These surveys are accessed via the survey link on the *Guild* homepage. *Guild* Members and Associates are more likely to take a survey than non-members because each of the 16,000 plus Members and Associates receives an email notifying them each time a survey has been posted and inviting them to participate. For this reason, we can classify these surveys as random samples because all Members and Associates have an opportunity to participate, and their participation is random.

Research Reports

Guild Research Reports present the data collected by the surveys as well as analysis and commentary provided by the *Guild* Director of Research and members of the Research Committee. These reports are archived on the *Guild* Web site and are downloadable in PDF format. All *Guild* Research Reports are available free of charge to *Guild* Members. Individual reports are available to Associates and non-members who have participated in the survey for that particular report.

2004 Research Surveys and Reports

In 2004 the *Guild* conducted ten surveys and published an accompanying research report for each with extensive commentary and analysis. We encourage *Guild* Members to access and download these reports and therefore we are providing the following index as a handy reference guide. These reports formed the basis for the data, commentary and analysis contained in this report, T*he Current Trends in e-Learning Report*.

1. *Usability and e-Learning*
2. *Metrics: Learning Outcomes and Business Results*
3. *Report on Flash Usage and Practice in e-Learning*
4. *Report on Experiences and Preferences of Synchronous e-Learners*
5. *Report on Trends in Organizational Practices of Synchronous e-Learning*
6. *The e-Learning Outsourcing Research Report*
7. *The Trends in Blended Learning Research Report*
8. *The LMS Research Report*
9. *The Learning & Professional Development Report*
10. *The e-Learning Accessibility and Section 508 Report*

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

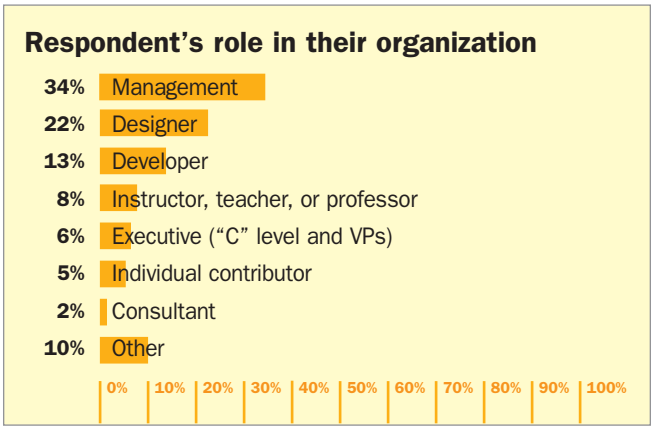
Demographics of the Surveys' Respondents

In total there were almost 4,200 participants in the ten *Guild* surveys conducted in 2004. These surveys were open to *Guild* Members and Associates as well as to occasional Web site visitors.

Prior to 2004 *Guild* Research surveys did not query respondents as to any of their particular demographic attributes. Beginning with the second survey of 2004, *Metrics: Learning Outcomes and Business Results*, however, we began to ask respondents to identify themselves and their organizations by a few different attributes. Therefore, we have data from these attributes for only nine of the ten 2004 *Guild* surveys.

The aggregation of the data from these nine surveys yielded 4,023 responses for organizational role and company size, while type of organization yielded only 3,046 responses. This discrepancy is due to the latter attribute's exclusion from three of the surveys (*Metrics: Learning Outcomes and Business Results*, *Report on Experiences and Preferences of Synchronous e-Learners*, and *Report on Trends in Organizational Practices of Synchronous e-Learning*). The following table indicates which attributes were included in each survey.

Survey Topic	Respondent's Role	Organization Size	Organization Type
Usability			
Metrics	•	•	
Flash	•	•	•
Synchronous: Organization	•	•	
Synchronous: Learners	•	•	
Outsourcing	•	•	•
Blended Learning	•	•	•
LMS	•	•	•
Learning and Professional Development	•	•	•
Accessibility and Section 508	•	•	•
Total Responses	4,023	4,023	3,046



Respondent's Role in Their Organization

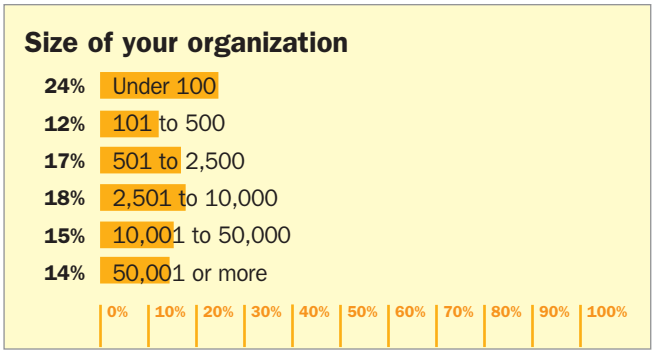
In nine of ten surveys conducted respondents were asked to indicate their role in their organization. In most surveys, respondents were offered the choice of "management," "designer," "developer," and "instructor, teacher, or professor." There was not, however, a consistent set of response choices for this question across all of the surveys. For some surveys, we added roles because of the particular purpose and nature of the survey, for example, "e-Learning programmer," in the case of the *Report on Flash Usage and Practice* in e-Learning survey. Other roles, "student" for example, were dropped during the course of the year because their rate of frequency was so low. Beginning with the two Synchronous surveys, we added an "other" category to capture alternative choices that we had not offered.

For the purpose of aggregating responses to this question from all nine surveys into one table, we moved responses for any category that that did make up at least 1% of the total sample into the "other" category.

- ***40% of respondents occupy management or executive positions.***
- ***35% of respondents are designers or developers.***
- ***8% of respondents are in an instructional role.***

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Demographics of the Surveys' Respondents



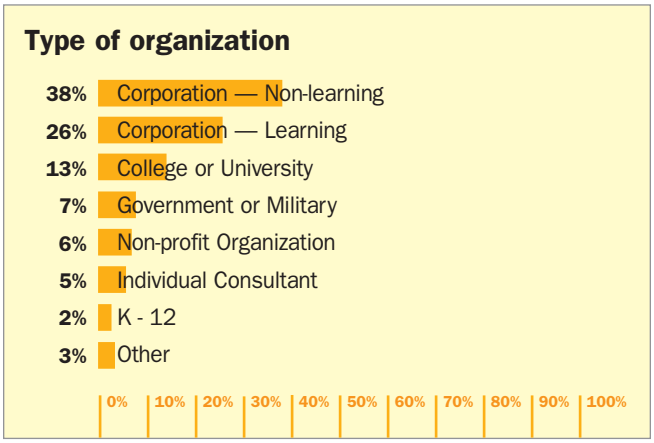
Size of Respondents' Organizations

Participants in nine of ten of the aggregated surveys were asked to list the size of their organization by number of employees. The data have been consolidated into fewer categories than those that were originally offered. This consolidation was done in order to ease data interpretation and allow for a more comparative analysis.

In general, the aggregated results posted in this report map very closely to those in each of the nine surveys. This suggests that the *Guild*'s survey response pool is consistent, reliable, and statistically valid.

Consistent throughout all of the surveys are the following approximate trends which correspond to the general population of the more than 16,000 *Guild* Members and Associates worldwide:

- ***47% of respondents' organizations have more than 2,500 employees***
- ***29% of respondents' organizations have between 101 - 2,500 employees***
- ***24% of respondents' organizations have fewer than 100 employees.***



Type of Organization

This question was asked in seven of the ten 2004 *Guild* Research surveys and therefore yielded a lower number of respondents than the previously described attributes. However, they are representative of the entire *Guild* membership and, given the size and random nature of the sample, the data in this report can be generalized accordingly.

Note that 64% of the survey respondents work for corporate organizations. Since the *Guild* community comprises both e-Learning practitioners and their suppliers, we decided to segment this corporate population accordingly, as each has different interests and perspectives. Therefore, with the exception of the Research Report on *Flash Usage and Practice in e-Learning* survey, we asked respondents in these seven surveys to identify whether their organization is a provider of learning products/services or not. The non-supplier corporate population represents 59% of the total number of respondents working for a corporation. For purposes of this report we placed the 198 corporate respondents from the Research Report on *Flash Usage and Practice in e-Learning* survey in the non-learning supplier category. Therefore, the data would be subject to variation and leaves room for a minimal, yet noteworthy, margin of error among the corporate figures.

The largest number of respondents from organizations other than corporations are from college and universities (13%) followed by respondents from the government and military (7%).

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

The Learning Experience and Practice of Survey Respondents

Since learning itself is at the core of the practice of *The e-Learning Guild* community, our research often focuses on the ways we learn. As such, several of the surveys posed questions on the nature of the respondents' own learning. In this section, we present a perspective on knowledge acquisition and transfer; attainment of skills proficiency; and the phenomenon of multi-tasking during the learning experience. The data in this section of the report are taken from the following surveys: *Learning & Professional Development*, *Flash Usage and Practice in e-Learning*, and *Experiences and Preferences of Synchronous e-Learners*.

Research shows that people acquire new knowledge and/or skills through both formal education and training programs and informal learning situations. When you think back on the past twelve months what was the primary way in which you acquired the new knowledge and/or skills?

- **48%** Informal learning situations (either intentional or accidental) comprising interactions with peers or management or subject matter experts or observations and/or personal investigation into the subject such as reading or free webinars or attending conferences.
- **29%** Learning by performing the knowledge or skills or attitudes and/or behaviors in on-the-job situations with real performance consequences where the output of the activity is measurable and is conducted in business environments.
- **23%** Formal education programs and/or systems where learning objectives have been established and published and in which knowledge or skill is acquired in activities or exercises.

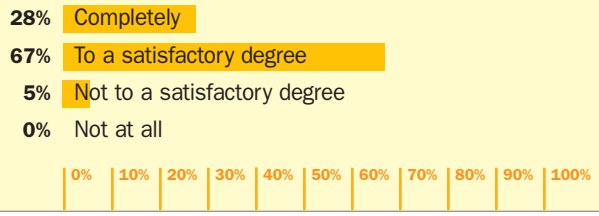
Knowledge Acquisition and Transfer

In the *Learning and Professional Development* survey, we focused on exploring the ways that members of the *Guild* community acquire the knowledge and skill they need to do their jobs. Several of our inquiries in that survey sought to establish just how much of their learning takes place through formal education programs versus informal learning or on-the-job situations. We wanted to test the conventional wisdom that posits that 80% of learning is informal. So, we asked the respondents how they had acquired new knowledge or skills related to their job. We gave them three choices and allowed them to select only one. Generally, they confirmed that indeed most learning takes place in informal situations (48%). Learning on-the-job had the second highest frequency at 29%. One could argue that most on-the-job learning is informal in nature, with the exception of programs such as formal, scheduled mentoring, and by that logic, if we combine the responses to informal learning situations and learning by performing on-the-job, we have a total of 77% favoring informal learning versus 23% for formal learning programs. So, it seems that the actual experience of our survey respondents confirms the 80/20 rule when it comes to the balance between informal and formal learning.

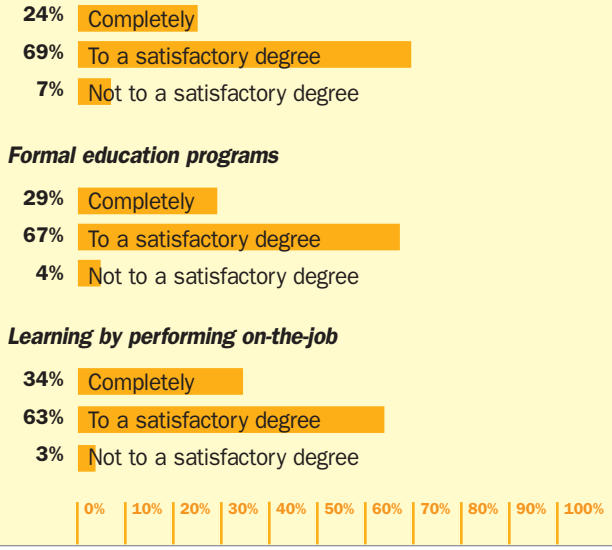
© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

The Learning Experience and Practice of Survey Respondents

Were you able to transfer the new knowledge and/or skills to your job?



Transference of learning to the job by learning modality



Further in that same survey, we asked respondents whether they were able to transfer what they had learned to their job. Here, we found to our surprise and delight that the rate of transference is extremely high. Over 95% of respondents reported that they were able to transfer their newly acquired knowledge or skills to their jobs to at least a satisfactory degree. A significant portion of the sample (28%) reported that they were able to effect the transfer "completely."

These results made us wonder. Was there any significant difference in the level of transference between those who learned informally, formally, or on the-job? So, we cross tabulated the results of this question with those of the prior question.

It should not be surprising to discover that "learning by performing on the job" had the highest frequency (34%) for complete transference, yet there was not much difference between these three learning modalities overall. In fact, only a few percentage points separated the three choices when it came to transference achieved to either a complete or satisfactory degree (informal learning situations — 93%; formal learning programs — 96%; and learning by performing on-the-job — 97%).

We may conclude from this data that while more learning happens informally by a significant margin, it may not be assumed that this learning is necessarily more effective when it comes to transference of the acquired knowledge or skill to the job.

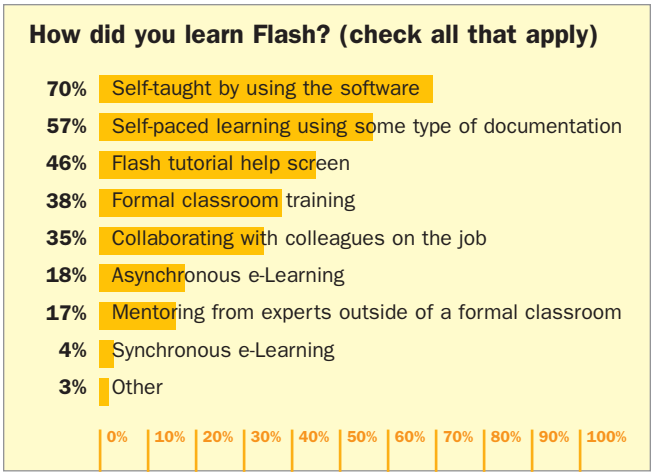
We have noted elsewhere in our reports that the measurement of transfer of learning to the job is not a common practice in our respondents' organization, nor have we uncovered any truly reliable techniques or tools for measuring transfer regardless of how the learning happened. Yet, subjectively, our respondents report that such transfer happens subsequent to the learning experience. Although these data prompt us to consider further avenues of inquiry and investigation into these phenomena, we are compelled to highlight three important findings as provided by the data in this survey:

1. Much learning is in fact informal, and takes place on the job, rather than through formal educational programs,
2. There does not seem to be a correlation between the way respondents learn and their level of satisfaction in transferring their newly acquired knowledge to their jobs, and
3. The fact that organizations do not commonly measure this transference does not mean that it is not happening, at least in the subjective opinion of the respondents.

Given these results, we thought it would valuable to provide a cross reference to similar questions that were posed to survey respondents in the *Flash Usage and Practice in e-Learning* survey. In general, these data tended to support what we learned in the *Learning & Professional Development* Research Report, and in fact took our findings about learning a step further.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

The Learning Experience and Practice of Survey Respondents



Learning "Flash"

Flash is one of the most widely used tools for e-Learning development and in *Flash Usage and Practice in e-Learning Research Report*, we asked our respondents how they had learned Flash. We offered several choices and allowed them to select all that applied. As we look back on the results in the context of the *Learning & Professional Development Research Report*, we find some general consistency in the practice of learning among respondents.

It should be noted here that the respondents to these two surveys are not the same sample, even though any number of them may have responded to both surveys. However, as is the case with most of the *Guild* surveys, they can be generalized to the entire *Guild* population due to their random nature, their size and statistical validity.

That said, we note that the top three modalities for learning Flash among the respondents are self-paced, and each could be considered a type of informal learning or learning on the job. The highest frequency at 70% is "Self-taught by playing around with the software," clearly an informal mode, which could take place in an on-the-job, and perhaps in a just-in-time situation.

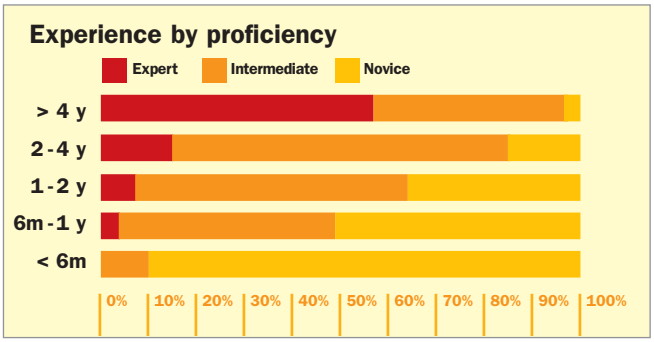
Formal classroom training ranks fourth at 38% and quite a bit ahead of two forms of e-Learning: asynchronous and synchronous e-Learning. So it seems that professional e-Learning designers and developers who use Flash to develop e-Learning do not frequently use e-Learning to learn how to use Flash.

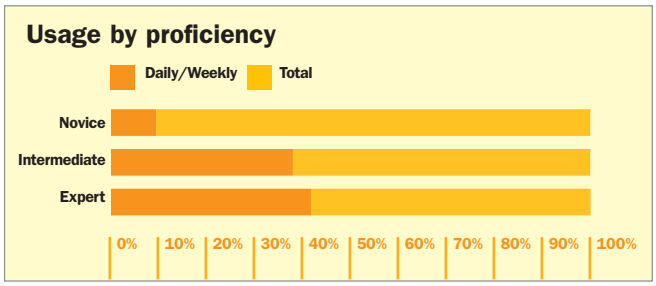
We were surprised that "social learning" for learning Flash was not as frequent a selection as we had anticipated. "Collaborating with colleagues on the job" was reported by 35% of respondents, and "Mentoring from experts outside of a formal learning environment" by only 17%.

Two caveats should be given here regarding our sample population and the subject matter being learned. It is possible that e-Learning professionals who might tend to be used to and comfortable with learning the use of authoring and development tools by "playing around" might show a different result from other groups. Technology novices learning Flash may rely much more on formal classroom training and forms of collaboration with colleagues and experts. This possibility raises the question of whether design and development professionals design and develop according to their own personal learning needs and preferences, or those of the learners they are developing for.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

The Learning Experience and Practice of Survey Respondents





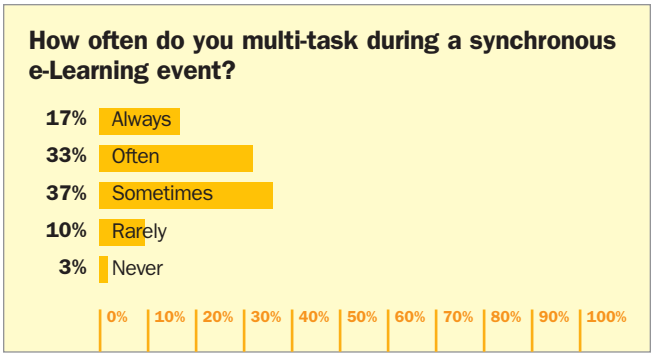
Learning "Flash" (continued)

In the *Flash Usage and Practice in e-Learning Research Report* we also looked the issue of proficiency with Flash in on-the-job practice. As such, we were looking at the question of knowledge and skill transference, albeit from a different slant. What we discovered is that Flash proficiency takes time and regular practice to achieve. Like so many other tools or technologies, Flash is not something that you can learn in one sitting and thereby become an expert in its application.

In this survey we asked respondents to rank themselves as "Expert," Intermediate," or "Novice." We also asked them to tell us how long they have been using Flash and how often they use Flash to produce e-Learning content. When we looked at these data together, the resulting cross tabulations produced the results depicted in the charts. They each show clearly that "experts" are most often those who have been using Flash for two years or more, and who use Flash on a daily or weekly basis. At the same time, novices tend to have less than a year of experience, and tend to use Flash less frequently than on a daily or weekly basis. Clearly, the learning is in the doing.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

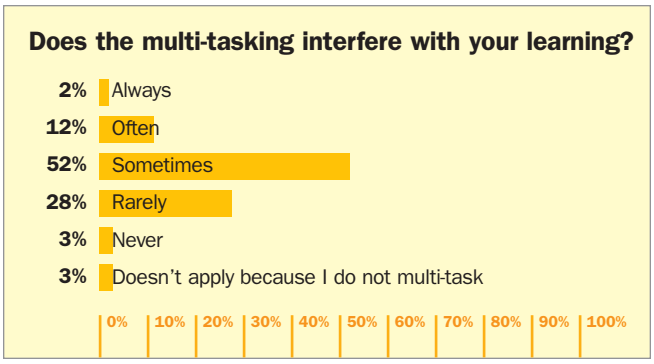
The Learning Experience and Practice of Survey Respondents



Multi-tasking while e-Learning

When we consider the frequency of informal and on-the-job nature of learning in general, and in e-Learning in particular, we must also think about the process of learning. We must ask to what extent the process of learning must be continuous and how that continuity can or should be maintained. We must also ask how the learner deals with interruptions to the learning process, and to what extent these interruptions impact the efficacy of the learning. When we designed the *Experiences and Preferences of Synchronous e-Learners Research Report*, we had an interesting opportunity to pursue this line of inquiry.

One of the outstanding features of synchronous e-Learning from the participant's point of view is that while one is virtually connected to a live event, one is in reality isolated from it. Unlike a "real" classroom in which it would be considered rude to do things other than pay attention to the instructor and engage in the class discourse, it is quite the opposite with a virtual classroom, precisely because no one knows when and if you are paying attention or not. This phenomenon coincides with the recent emergence of the concept of multi-tasking, a term which I believe was coined to reflect our need to accommodate the speed and complexity of life in the information age by having to do many things simultaneously in order to get anything done at all. So, in thinking about this convergence, we asked our respondents how often they multi-tasked during synchronous e-Learning events. Not surprisingly, only 13% say "rarely" or "never," while exactly half (50%) said "always" or "often."



So, the data indicate that synchronous e-Learners are multi-taskers and if you look further into the results of the *Experiences and Preferences of Synchronous e-Learners Research Report*, you'll discover what they are most often doing when they are multi-tasking during an e-Learning event. However, for the purpose of this section of this report, we include the question of whether this multi-tasking interfered with their learning. Here the results were not so clear. Only 14% reported that it did "always" or "often" interfere, and only 31% reported that "rarely" or "never" interferes. This left a muddled majority of 52% who said "sometimes."

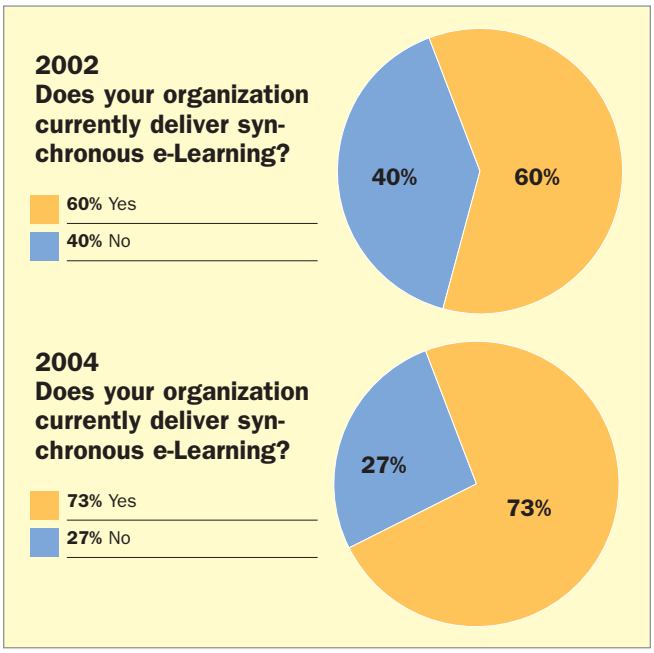
We present this data not because it is conclusive, rather just the opposite. Surely, multi-tasking during synchronous e-Learning can take many forms. Some forms, such as initiating an urgent Instant Message (IM) during an online PowerPoint presentation, is driven by the learner himself and may have little impact on learning. Others, such as a lengthy interruption by the boss, are of a more invasive and distracting nature and may seriously diminish learning. The point is that there are so many variables involved that we would be hard-pressed to draw any conclusion from these data other than that multi-tasking is pervasive during synchronous e-Learning and it may or may not have an impact on the learning. Whether it does or not depends on any number of variables. Given the increasing acceleration of the adoption of synchronous e-Learning, which we will cover in the next section of this report, such considerations may be an important and valuable line of research for the *Guild* community to pursue.

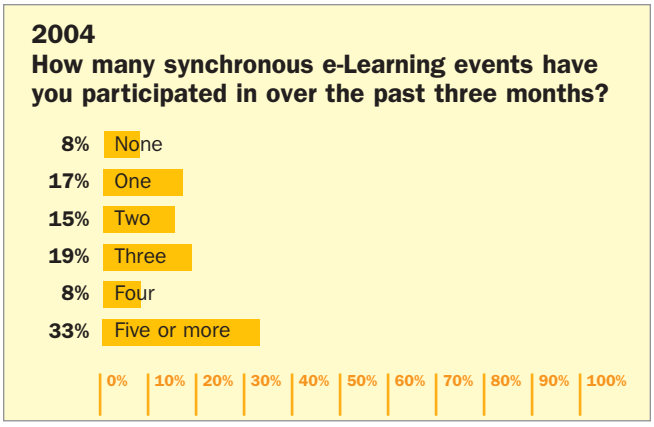
© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Trends in the Design and Delivery of e-Learning

The demographics of respondents participating in the 2004 *Guild* surveys confirm that many of them are engaged in the practice of designing and developing e-Learning courses, programs, and events. 35% of respondents in nine of the ten surveys in which we collected these data were instructional designers and course developers. 8% were instructors, teachers, or professors. Accordingly, many of our surveys focused on various aspects of design and delivery practices.

The data in this section of the report are derived from four 2004 *Guild* surveys: *Experiences and Preferences of Synchronous e-Learners, Trends in Organizational Practices of Synchronous e-Learning, Trends in Blending Learning*, and *Usability and e-Learning*.





Synchronous e-Learning

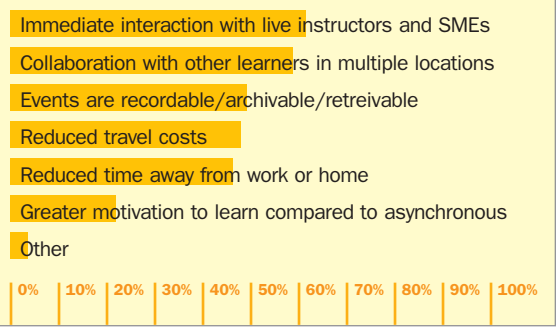
Synchronous e-Learning was one of the first research topics that the *Guild* looked into, and so we were able to look at trends on this subject beginning in 2001 and continuing through the surveys conducted in 2004.

The trend for synchronous e-Learning favors continued and accelerating adoption by organizations and individual learners. The percentage of organizations that are delivering synchronous e-Learning has grown from 60% to 73% over the two year period from 2002 to 2004 — an increase of 22%. This growth rate was mirrored on the individual learner level as well. In 2001, 54% of respondents to a *Guild* survey on this topic indicated that they had participated in a synchronous e-Learning event. That number rose to 69% in 2002, and ballooned in this year's survey to 92%.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Trends in the Design and Delivery of e-Learning

In your own experience as a learner, what are the THREE biggest advantages or benefits of synchronous e-Learning?



Synchronous e-Learning (continued)

Surely, these positive growth trends indicate that synchronous e-Learning must have characteristics that provide value to learners and organizations alike. To find out exactly which characteristics have the greatest appeal to learners, we asked the respondents of this year's survey to tell us what they like about synchronous e-Learning. We gave them several choices and allowed them to select all that apply. The two most frequent selections came up almost even at the 60% mark and gave us an answer that seems to make a great deal of sense.

According to the survey respondents, the first reason why learners like synchronous e-Learning is the "Immediate interaction and feedback from live instructors and SMEs" who are available through this modality. Of course! This reason would perhaps be the most frequent selection if the question were about class-room based instructor-led training. Students simply like direct access to their teachers.

On the contrary, the second reason speaks to what is not available in class-room based instructor-led training, the ability to transcend the complications of geographic distance and allow for collaboration and social learning no matter where the learner sits or from where the instructor lectures.

Thus in synchronous e-Learning, the positive qualities of live and interactive instruction can be combined with access to the learning from whatever distance in collaboration with many other learners. Clearly, this makes for a most compelling and valuable learning modality.

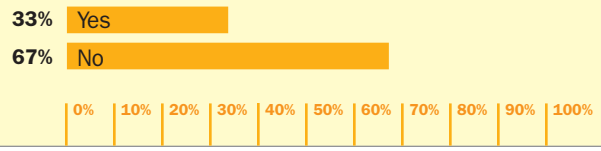
That synchronous e-Learning can also be recorded, archived, and retrieved may also mitigate the effects of multi-tasking on the learning experience as the learner can always go back and review what they missed during their bosses' interruption or their emergency Instant Messaging (IM) exchange.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Trends in the Design and Delivery of e-Learning

A blend of instructor-led classroom events and any form of technology-enabled instruction used outside the classroom.

A blend of various pedagogical frameworks (e.g. constructivism, behaviorism, and cognitivism).



Blended Learning

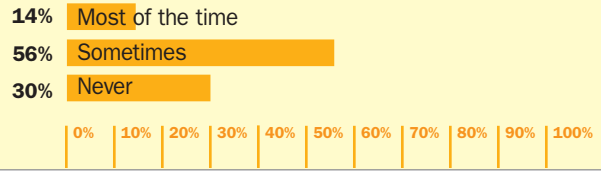
In February 2003 the *Guild* conducted a survey on blended learning and found that a significant majority of respondents' organizations (85%) use blended learning for the creation and/or delivery of educational content. In this year's survey we sought to discover more about how our community defined blended learning and how it was being used in their organizations.

Blending learning is one of those terms that may mean different things to different people. Perhaps blended learning is not much more than a marketing slogan meant to induce instructor-led learning devotees towards the promised land of e-Learning in a more gradual, balanced manner. Perhaps to more sophisticated practitioners of learning theory, blended learning embraces the reality that learning happens in different ways for different learners in different situations, and all of these must be accommodated through a blended pedagogical approach.

We offered our respondents four definitions of blended learning and asked them to indicate by a "yes" or "no" answer as to which was an operative definition in their organization. For the purpose of this report, we first present the definitions that scored the highest and the lowest frequency of "yes" responses.

What we found is that a significant majority of 93% define e-Learning as a combination of the traditional classroom with any form of what has come to be known as e-Learning. In this case, the marketers may have held sway. On the other hand, the least frequently cited definition described a blend of pedagogical frameworks: constructivism, behaviorism, and cognitivism. Some may claim that this is a more important and valuable definition than that which has currency with our survey respondents, but when we consider that the majority of our Members and Associates work for corporations, such academic distinctions may not be as fully understood or appreciated as they are in the world of higher education.

How often does your organization use synchronous e-Learning in blended learning programs?

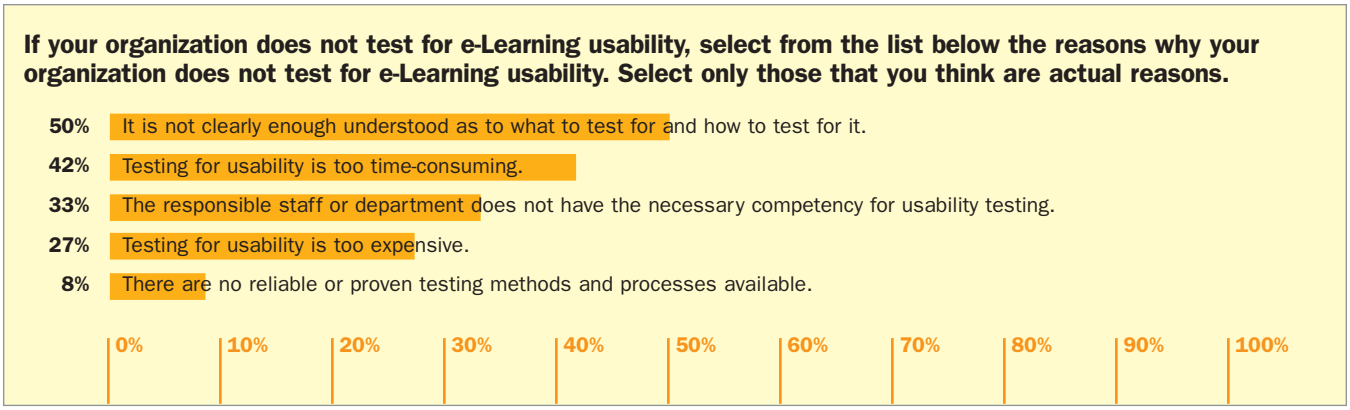


Blended Synchronous e-Learning

In the *Trends in Blending Learning* survey, we asked respondents how often their organizations used synchronous e-Learning in their blended learning programs. 30% of respondents reported that their organizations never used synchronous e-Learning in such a fashion, and only 14% said that they did most of the time. If we include the "sometimes" responses, we find synchronous e-Learning usage at a 70% frequency which puts this data point in line with the percentage of organizations delivering synchronous e-Learning (73%).

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Trends in the Design and Delivery of e-Learning



Usability

The first 2004 *Guild* Research survey addressed the topic of "usability." Given that e-Learning by its nature requires interaction with a graphical user interface (GUI), it is a given that traditional theories and practices regarding ease of use with such an interface apply to the design, development, and delivery of e-Learning.

In summary, we found that 92% strongly agree that usability is an essential consideration when designing e-Learning, 71% strongly agree that learning components should always be tested for usability, and 74% strongly agree or agree that a user's ability to meet learning goals is one of the most important measures of usability in e-Learning.

These results convinced us that usability has an important role to play in the design, development, and delivery of e-Learning. Yet despite this concurrence of opinion, we also found that about 35% of respondents' organizations do not test for the usability of their e-Learning courses or programs, and that many of those who do test only do so sometimes. Fortunately, our survey design also allowed for us to ask why not. The chart ranks the reasons by frequency.

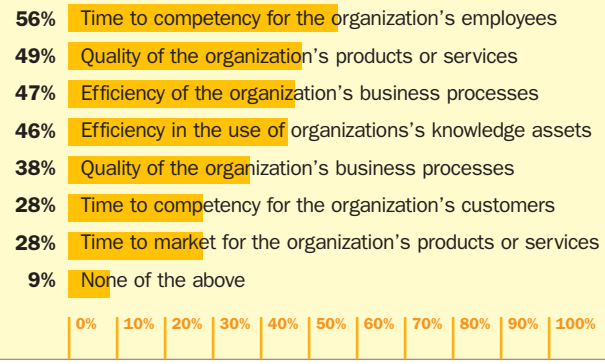
As we consider the reasons that we do not test for usability: lack of know-how and competency; testing is too expensive, testing takes too much time; there's no reliable methodology; we come logically to the final section of this report — measuring e-Learning, perhaps the most sought after, yet least-practiced, function of the e-Learning community.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

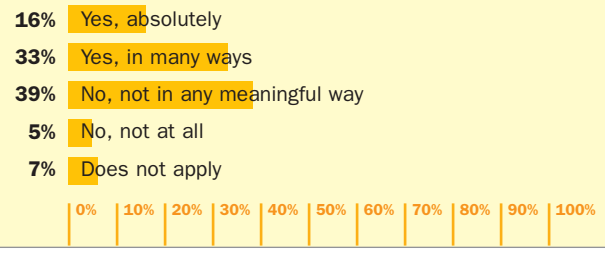
Measuring e-Learning

Why do organizations even do e-Learning? We've all heard the marketing pitches about the savings to be derived from the decrease in travel expenses, the reduction of investment in the bricks and mortar of classrooms, and the decline in the need for staff devoted to the demanding task of instruction. But these reasons, perhaps attractive to the cost-conscious executive at first glance, do not speak to some of the underlying reasons for implementing e-Learning, or for that matter, any learning initiative. In the survey that provided the data for *Metrics: Learning Outcomes and Business Results*, we asked the survey respondents what improvements their organizations were seeking to influence by implementing e-Learning. We gave respondents eight choices including "none of the above" and allowed them to select all that apply.

When implementing e-Learning programs, what does your organization seek to influence improvements in? (choose all that apply):



Does your organization make a strong, visible connection between the learning outcomes of e-Learning programs and your organization's business objectives and results?



The choice most frequently selected has to do with speed — improving the time to competency for the organization's employees (56%). e-Learning seems to be first and foremost about performance and productivity, and so it is no wonder that many e-Learning initiatives address the needs of the sales department for such projects as product roll-outs and introductions. This selection was closely followed, however, by choices involving improvements in quality and efficiency, so it may not be fair to say that one reason alone justifies an e-Learning initiative. Perhaps, what we take away from these data is an understanding that e-Learning makes a contribution in several facets of an organization's operations, and touches many of its core objectives. According to our respondents, e-Learning can play a role in getting things done faster, better, and more efficiently.

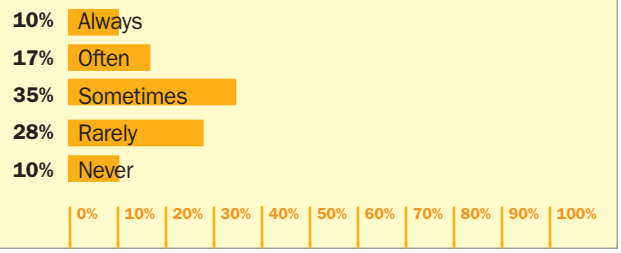
Suppose this fact is true, at least to the extent indicated by the survey respondents. Then, we might also wonder whether organizations are making a connection between their e-Learning initiatives and the business results they hope to impact. What we discovered in this survey is that many organizations (49%) do make such a connection.

Perhaps the question we should be asking is whether we should be encouraged or discouraged by these results. Having a data point from only this one year makes it difficult to say. We might get a more meaningful answer if we could see how these data were trending over time, and if it were possible to say that more organizations or fewer were connecting their e-Learning initiatives to business results as e-Learning become more broadly adopted.

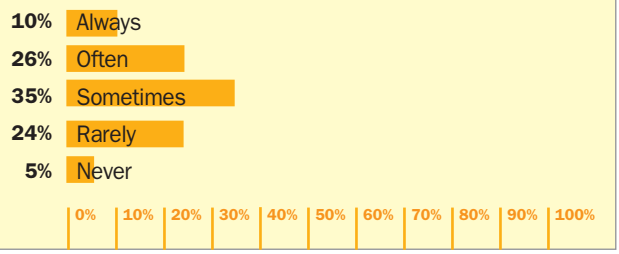
© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Measuring e-Learning

Does your organization follow up major e-Learning efforts to determine business results?



How often does your organization measure the effectiveness of its blended learning programs?



These results, however, do give a snapshot for future reference. By the same token, it is worth noting the results from another question in this survey. We also asked this same sample whether their organizations follow up major e-Learning initiatives to determine business results. Again the results were mixed. We found that 27% reported that their organizations did so "often" or "always," 38% "rarely" or "never," and 35% "sometimes."

Although we may not yet be able to have an accurate impression of the trends over time, in the area of measuring e-Learning we do have data from another 2004 survey, the *Trends in Blending Learning Research Report*, which point to the consistency with which organizations measure the effectiveness of e-Learning.

In this survey we asked a variation of the previously cited question. In this case we wanted to know about frequency of measurement when it comes to blended learning. The results were similarly mixed. We found that 36% reported that their organizations do so "always" or "frequently," 29% "rarely" or "never," and 35% "sometimes."

We would like to offer two hypotheses concerning the comparison of these two data points:

First, that the results are close enough statistically, even though they are taken from two different populations, to indicate that generally there is a segmentation by "thirds" between those organizations who measure consistently, sometimes, or hardly at all.

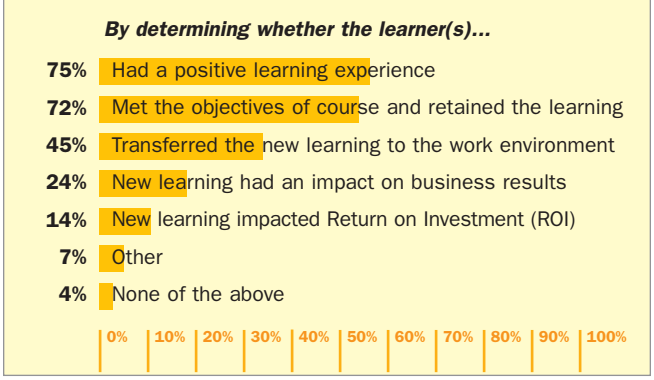
Second, that as we note the slight variations in the results between these two questions we find that organizations are more likely to measure blended learning than e-Learning in general. We speculate that this might be because blended learning initiatives are usually more sophisticated, complex, and costly and, as such, may be subject to closer scrutiny and more frequently require measurement. Perhaps, but we can only know for sure through further inquiry into this subject.

In concluding this section of the report, we would like to compare the results of two similar questions taken from two different surveys, *Metrics: Learning Outcomes and Business Results* survey, and *The 2004 LMS* survey. In both these surveys we asked questions about how organizations measure their learning programs. The results do indicate a trend in frequency between the two.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Measuring e-Learning

How does your organization measure the effectiveness of its blended learning programs?



In the survey conducted for *The Trends in Blending Learning Research Report*, we asked respondents how their organizations measured the effectiveness of their blended learning programs. We gave the respondents seven choices and allowed them to select all that apply. These choices included an "other" and a "none of the above" selection both of which scored fairly low at 7% and 4% respectively. We also gave them a "Return on Investment" (ROI) choice, which also scored quite low at 14%. (We note here that in the *Metrics: Learning Outcomes and Business Results* survey we found that 47% of organizations do not use ROI for measuring the business value of e-Learning).

The other four choices, as can be read in the chart, are derivative of the four Kirkpatrick levels of evaluation, and interestingly their frequency maps to the four levels in exactly the order that Kirkpatrick describes them. In other words, as we consider each deeper level of evaluation, it is less likely that an organization will measure it.

We reported results to a similar question in *The LMS Research Report*. In that survey, we asked respondents if their organization's investment in its LMS has paid off and 81% reported that it had. We next asked these same respondents how their organizations measure this pay off. We gave the respondents eight choices and allowed them to select all that apply. Here, as in the survey conducted for *The Trends in Blending Learning Research Report*, three of the choices mapped to the Kirkpatrick levels (Note that there was no choice for transference of acquired knowledge or skill to the job), yet in this case the results were slightly different. While "Employee satisfaction surveys" (level 1) recorded the highest frequency among three choices (37%), "Impact of learning in business results" (level 4) and "Learning effectiveness reports" (level 3) came in so close behind as to be statistically insignificant.

Perhaps this variation may have more to do with the limited ways that many LMSs can report, or are configured to report, on learning. Since many LMSs are used primary for administration of learning, it should not surprise that the most frequently cited measurement method in this survey was "program completion reports" which is certainly not much of a measurement in terms of indicating whether learning actually happened or if there was any impact on business results.

In concluding this section on measuring e-Learning we might therefore note that currently the systems for managing e-Learning are not providing enough of the capability, or are not being used effectively enough, to measure those improvements in an organization that e-Learning most frequently seeks to improve.

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

Summary

As noted at the beginning of this *Guild* Research Report, the extensive data sets from the ten 2004 *Guild* Research surveys can be sorted in many different ways, and could be dissected and analyzed in many more. What we have offered here in this report is by no means exhaustive or conclusive, and serves only to offer a limited view of some of the trends and patterns that have emerged out of research and study of the topics we chose to investigate.

Again, we encourage *Guild* Members to look more deeply into this body of research and share your own observations and conclusions with others in your organization and with the community at large. Your continued participation in the *Guild* Research polls and surveys helps us to build a collective perspective, and your reflection on the results may connect new dots and lead to innovations in e-Learning practice and technology that serve us all.

In 2005 we will be conducting twelve new surveys, several of which will build upon the research cited in this report. As we do so, we will add to our knowledge base and continue to describe and explore the current trends in e-Learning.

To learn more about these subjects:

To learn more about the subjects discussed in this report, we encourage you to search the following pages on the *Guild*'s Web site:.

The Resource Directory: http://www.eLearningGuild.com/resources/resources/index.cfm?action=viewcats

The eLearning Developers' Journal: http://www.eLearningGuild.com/articles/abstracts/index.cfm?action=view

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com

About the author

Joe Pulichino, Director of Research, The eLearning Guild

Joe Pulichino began his career in education as an English instructor at Rutgers University over 25 years ago. Since then he has held a number of senior management positions in the technology sector where he was responsible for the development, delivery, and marketing of a wide range of corporate education programs and services. Most recently he has served as vice-president of education services at Sybase, vice-president of eLearning at Global Knowledge Network, and CEO of EduPoint. He is an adjunct faculty member of the Pepperdine University Graduate School of Education and Psychology where he is completing his Ed.D. in Education Technology. The focus of his research is on informal and organizational learning. Joe is principal of the Athena Learning Group, a virtual network of consultants and academics working in the fields of learning, knowledge management, performance enhancement and Communities of Practice.

The Research Committee Members

Ms. Dawn Adams, Content Manager, Microsoft Global e-Learning Services
Ms. Karen Allnutt, Instructional Designer & Software Trainer, Steelman Services LLC
Dr. David J. Brand, Learning Design & Technology, 3M Corporation
Ms. Paula Cancro, Information Technology Training Specialist, IFMG, Inc.
Mr. Jerry Day, Senior Technical Training Developer, Pillar Data Systems
Ms. Barbara Fillicaro, Writer, Training Media Review - USA
Ms. Silke Fleischer, Product Manger, Macromedia
Ms. Silvia R. Folts, Ed.D , President, Distance Instruction
Joe Ganci, CEO, Dazzle Technologies, Corp.
Dr. Nancy Grey, Director - Pharmaceutical Regulatory Education, Pfizer
Ms. Sheila Jagannathan, e-Learning Specialist, The World Bank Institute
Dr. Warren Longmire, Manager, Learning Strategy, Convergys
Dr. Maggie Martinez, CEO, The Training Place
Frank Nyguen, Senior Learning Technologist, Intel
Mr. Eric Rosen, Online Learning Strategist, Stanford University
Dr. Patti Shank, Managing Partner, LearningPeaks, LLC
Dr. Richard Smith, Instructional Designer, Amerind
Celisa Steele, Chief Creative Officer, Isoph
Ernie Thor, Senior Instructional Designer, Cingular Wireless
Angela van Barneveld, Senior Learning Design Specialist, Canada Customs and Revenue Agency

About the Guild

The eLearning Guild is a global Community of Practice for designers, developers, and managers of e-Learning. Through this member-driven community, the *Guild* provides high-quality learning opportunities, networking services, resources, and publications.

Guild members represent a diverse group of instructional designers, content developers, Web developers, project managers, contractors, consultants, managers and directors of training and learning services – all of whom share a common interest in e-Learning design, development, and management. Members work for organizations in the corporate, government, academic, and K-12 sectors. They also are employees of e-Learning product and service providers, consultants, students, and self-employed professionals.

The 15,000 plus members of this growing, worldwide community look to the *Guild* for timely, relevant, and objective information about e-Learning to increase their knowledge, improve their professional skills, and expand their personal networks.

The eLearning Developers' Journal is the premier weekly online publication of *The eLearning Guild*. The Journal showcases practical strategies and techniques for designers, developers, and managers of e-Learning.

The eLearning Guild organizes a variety of industry events focused on participant learning:

Online Events...

- The eLearning Guild's Online Forum Series — Thursdays
- The LMS/LCMS Implementation & Management Online Symposium — July 27-29, 2005
- The eLearning Management Online Symposium — October 5-7, 2005
- The Rapid eLearning Development Online Symposium — April 27-29, 2005

Face-to-face Events...

- eLearning Producer Conference & Expo 2005 — March 14-17, 2005
- The eLearning Instructional Design Conference — June 20-24, 2005
- DevLearn 2005 — The eLearning Developers' Conference & Expo — November 15-18, 2005

© 2005 *The eLearning Guild*. All rights reserved. http://www.eLearningGuild.com