Future Directions in e-Learning Research Report 2006

ANALYSIS AND COMMENTARY BY JOE PULICHINO

This is our second annual report on the subject of future directions in e-Learning. As we did last year, the Guild Research Committee asked Guild Members and Associates to take a close look at the e-Learning programs and initiatives in their organizations and report to us on what they expect to see in these activities in the next twelve months. Once again, we found that e-Learning remains a rapidly growing practice with a bright future in the vast majority of our respondents' organizations — indeed, 75% believe the term "e-Learning" serves a useful purpose and is here to stay for the foreseeable future.

Although this report shows levels of increased activity in key practice areas consistent with the results of last year's survey, we are seeing even greater focus on both content quality and rapid development, as well as development of the resources that make better, faster e-Learning possible. Another explosive focus area, which grew significantly year-over-year, is the extension of e-Learning programs to our respondents' organizations' customers and partners. In addition, for the first time, we looked at trends for some emerging e-Learning modalities — blogging, podcasting, mobile learning, and games — and we found that their levels of adoption are on the rise in many of our respondents' organizations.

As usual with Guild research survey samples, this survey's respondents work at many different organization types. Therefore, we decided to determine whether our respondents see things any differently depending on the type of organization they belong to. We looked specifically at respondents from higher education, corporations, and e-Learning vendors. It turns out that these varied types are more homogeneous than one might suspect, but not without a few notable exceptions.

This survey and report were designed and developed by a team of members of the Guild Research Committee including, Ms. Barbara Fillicaro of The Media Review, Ms. Sheila Jagannathan of the World Bank, Mr. Frank Nguyen of Intel, Dr. Maggie Martinez of The Training Place, Mr. Eric Rosen of QMind, and Dr. Warren Longmire of Apple.

Page Guide to the Research Report

Demographics

We asked our respondents to identify themselves and their organizations by five attributes: their role in their organization, the size of their organization, the type of their organization, their organization's primary business focus, and the department they work in. This section presents demographic data about our survey sample.

Overview of Survey Methodology

This survey, like all other Guild surveys, was open to Guild Members and Associates as well as to occasional Guild Website visitors. Respondents complete these surveys by accessing the survey link on the home page of the Website. Naturally, Guild Members and Associates are more likely to participate than non-members are because each of the more than 20,000 Members and Associates receive an email notifying them of the survey and inviting them to participate. For this reason, we can classify this survey as a random sample since all members had an opportunity to participate, and their participation was random.

Demographic summary

A respondent to this survey is most likely to be working as a manager or executive (36%), although almost one-third are in an instructional designer role (31%). There are almost the same number of course developers (12%) as instructors, teachers, or professors (11%), and those who selected "Other" (10%) are mostly individual consultants, students, and technical staff. (Q1, page 3)

Our respondents work in organizations of all sizes. Organizations with less than 100 employees have the highest frequency (27%) and those with 50,000 or more employees have the lowest frequency (10%). Thus, there is a 17% range between the highest and lowest of the six size categories. (Q2, page 3)

By a significant majority, our respondents work in corporate environments (64%), divided between e-Learning product or service providers (24%) and those corporations that are not in the e-Learning business (40%). Institutions of higher education make up 17% of the sample. (Q3, page 3)

The most frequently cited primary business focus for our respondents' organizations is "Higher Education" (17%), followed by "Commercial Training,

Demographics

or Education Services" (11%), "Financial Services" (9%), and "Technology (Hardware or Software)" (9%). More than half of the respondents (54%) selected one of the remaining twenty-one sectors. (Q4, right column, top)

A majority of our respondents work in a "Training or Education" department (55%), followed at a distance by "Human Resources" (11%) and "Information Technology" (11%). Those who selected "Other" (6%) are mostly independent consultants, or those who work in small or non-traditional organizations that do not have these types of departmental structures. (Q5, right column, bottom)

Q1. What is your role in your organization?

8%	Executive ("C" Level and VPs)
28%	Management
31%	Instructional Designer
12%	Course Developer
11%	Instructor, Teacher, or Professor
10%	Other

Q2. What is the size of your organization (number of employees)?

27%	Less than 100
15%	101 to 500
18%	501 to 2,500
18%	2,501 to 10,000
12%	10,001 to 50,000
10%	50,001 or more

Q3. What type of organization do you work for?

40%	Corporation — Not a learning or e-Learning provider
24%	Corporation — Learning or e-Learning provider
17%	College or University
8%	K - 12
5%	Military
4%	Non-profit organization
1%	Government
1%	Individual consultant

Q4. What is your organization's primary business focus?

17%	Higher Education
11%	Commercial Training, or Education Services
9%	Financial Services
9%	Technology (Hardware or Software)
8%	Healthcare
6%	Professional Business Services, or Consulting
5%	Insurance
5%	Government
5%	Other
4%	Manufacturing
3%	Banking
3%	Telecommunications
2%	Pharmaceuticals, or Biosciences
2%	K-12
2%	Publishing, Advertising, Media, or PR
2%	Retail or Wholesale
2%	Transportation
1%	Hospitality and/or Travel, or Food Service
1%	Military
1%	Aerospace
1%	Non-profit
1%	Utilities
0%	Arts and Entertainment
0%	Real Estate
0%	Petroleum or Natural Resources

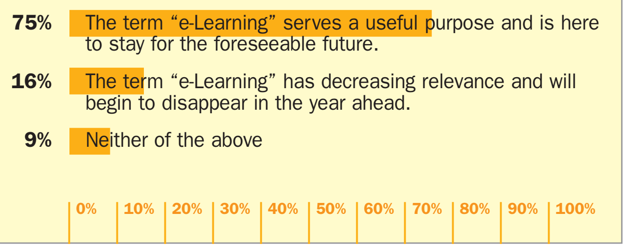
Q5. What department do you work in?

55%	Training or Education
11%	Human Resources
11%	Information Technology
6%	Other
6%	Sales or Marketing
5%	Research and Development
4%	Engineering or Product Development
2%	Customer Service

The Current State of e-Learning

This year the Research Committee wanted to determine whether respondents from different types of organizations view the current state of e-Learning differently. So, we segmented the respondents according to their answers to Question 3 (What type of organization do you work for?) and focused on three groups: higher education, corporations, and e-Learning providers. Our findings show that these groups are more or less on the same page, with very minor differences between them.

Q6. The term "e-Learning" was coined in the late 1990s to describe the use of technology to deliver learning and training programs. Which of the following best characterizes your opinion about this term?



We asked this question in the 2005 survey (refer to the *Future Directions in e-Learning 2005 Research Report*) in response to speculation that the term "e-Learning" might be losing its currency. As we wrote in that report last March, "Some say that putting an "e-" in front of learning is an anachronistic holdover from the early days of the internet boom; others feel that by using this particular term to describe the practice, we highlight the "e-" rather than putting our attention where it belongs: on the broader subject of learning itself." However, in March 2005, we reported that 75% of the survey respondents agreed that "the term 'e-Learning' serves a useful purpose and is here to stay for the foreseeable future," while only 19% agreed that "the term 'e-Learning' has decreasing relevance and will begin to disappear in the year ahead." At the time, we wondered if those 19% would grow in number over the coming year.

That year has now come and gone and it turns out that those 19% of respondents actually decreased in number — from 19% to 16%; while the percentage of respondents who agree that the term "e-Learning" is useful and is here to stay remains at 75%. Given the size of the sample, this 3% variance is within the plus or minus margin of error. Nonetheless, we can report that our respondents have stayed consistent in their belief that "e-Learning" has a place in the vocabulary of the community.

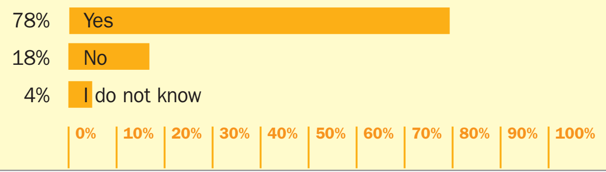
Q6a. Comparison among Entire Sample and Higher Education, Corporations, and e-Learning Providers

Entire Sample	Higher Education	Corporations	e-Learning Providers	
75%	78%	74%	78%	The term "e-Learning" serves a useful purpose and is here to stay for the foreseeable future.
16%	16%	16%	16%	The term "e-Learning" has decreased relevance and will begin to disappear in the year ahead.
9%	6%	10%	6%	Neither of the above

When we looked at the responses to this question segmented by organization type, we found that in this case as well there is no significant variance among these types. We seem to have agreement across the board, including between users and vendors, that "e-Learning" is a useful term and that most practitioners will continue to use it regardless of the type of organization they work for.

The Current State of e-Learning

Q7. Has e-Learning matured to the point that it should no longer be considered as an independent initiative, but rather one of many tools used for instruction and information distribution?



For this year's survey, we added this question to supplement Question 6. We wanted to determine how well e-Learning had been integrated with other forms and modalities of training, professional development, and knowledge management. We were prompted to do so partly because of the overwhelming ubiquity of blended learning initiatives in the community that integrates e-Learning and traditional classroom-based instruction, but also because of the increasing use of e-Learning in the service of performance support and enterprise content management programs.

Interestingly, we found that while 75% of respondents see e-Learning as a practice which very much stands on its own (refer to Question 6), nearly the same percentage of respondents (78%) agree that e-Learning should not be considered as an independent initiative apart from other similar tools that aid in instruction and information distribution. For most of the Guild community, therefore, e-Learning is a distinctive part of a whole solution.

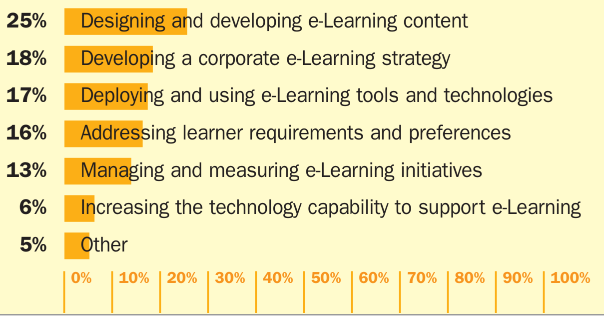
Q7a. Comparison among Entire Sample and Higher Education, Corporations, and e-Learning Providers

Entire Sample	Higher Education	Corporations	e-Learning Providers	
78%	75%	79%	82%	Yes
18%	22%	17%	14%	No
4%	3%	4%	4%	I do not know

When we looked at the responses to this question segmented by organization type, we found some variance worth noting. Respondents from e-Learning providers, those organizations that sell e-Learning products and services to others, were, ironically enough, somewhat more likely to agree with the premise of this question than their counterparts in higher education (7%) and corporations (3%). Do e-Learning providers see new opportunities resulting from greater integration of e-Learning with other tools used for instruction and information distribution? And, are they seeing these opportunities slightly ahead of their customers?

E-Learning Success Factors and Priorities

Q8. For e-Learning to be successful in your organization in 2006, which e-Learning activity will need the most focus and attention? (Select only one)



The intent of this question was to determine which priority, out of a list of competing priorities, was truly #1 in our respondents' organizations. We limited the respondents to one selection for this question so that they would narrow their focus down to the one, most pressing priority. The range between the highest frequency and the lowest is 20%, indicating that there is no single run-away priority among all respondents. This fact may be the result of different perspectives on what is most important, depending on variables such as the job role of the respondent or business objectives of the organization itself.

We asked this question in the 2005 survey as well, adding only the "Other" selection to the original six choices. Not much has changed year-over-year. The most frequently selected choice, both this year and last, is "Designing and developing e-Learning content," although it is down by 6% percentage points from 31% in 2005. Content remains King!

The "Other" choice picked up 5% of the responses this year. This choice was not included in last year's survey. Several of these respondents took this opportunity to get around our "Select only one" strategy and wrote in "All of the above." Most of the rest were actually variations on one of the choices provided, or in a few cases, on more specific tasks such as "Selling e-Learning to our customers," or "Linking learning content to skills and competencies."

Q8a. Comparison among Entire Sample and Higher Education, Corporations, and e-Learning Providers

Entire Sample	Higher Education	Corporations	e-Learning Providers	
25%	26%	25%	25%	Designing and developing e-Learning content
18%	22%	17%	12%	Developing a corporate e-Learning strategy
17%	14%	17%	18%	Deploying and using e-Learning tools and technologies
16%	21%	12%	21%	Addressing learner requirements and preferences
13%	7%	14%	14%	Managing and measuring e-Learning initiatives
6%	2%	11%	4%	Increasing the technology capability to support e-Learning
5%	8%	4%	6%	Other

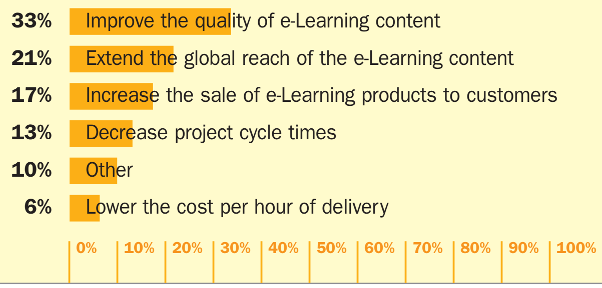
When we looked at the responses to this question segmented by organization type, we found that respondents from all three organization types selected "Designing and developing e-Learning content" as their #1 priority.

Yet, there were also some variances worth noting, as predictable as these might seem:

- E-Learning providers are less likely to focus on "Developing a corporate e-Learning strategy" (12%) than institutions of higher education (22%) or "Corporations" (17%). This seems to make sense. Does an e-Learning vendor need to develop a corporate e-Learning strategy? Perhaps they do if that is one of the consulting services that they provide to their clients.
- Corporations are less likely to focus on "Addressing learner requirements and preferences" (12%) than institutions of higher education (21%) or e-Learning providers (21%). Might this reflect a greater need to satisfy customers over employees?
- Institutions of higher education are less likely to focus on "Managing and measuring e-Learning initiatives" (7%) than corporations (14%) or e-Learning providers (14%). This result is consistent with other Guild research, which indicates that corporate enterprises are more likely to measure and evaluate e-Learning initiatives than other organization types.
- Corporations are much more likely to focus on "Increasing the bandwidth and/or technology capability to support e-Learning" (11%) than institutions of higher education (2%) or e-Learning providers (4%). Is this because they have less than their counterparts do, or because they are always in need of more?

E-Learning Success Factors and Priorities

Q9. Which one of the following objectives will be your organization's highest e-Learning priority in 2006? (Select only one)



For this question, we gave respondents six choices, including "Other" with a write-in text box, and allowed them to select only one. We attempted to define business objectives as related to e-Learning in very general terms, and by doing so presented a set of selections that deal with high-level "umbrella" issues such as quality, cost, and cycle time. Arguably, there are many other ways that we could have framed the choices, just as we could have included more than these six, and the fact that the "Other" category garnered 10% indicates that there are more objectives worth considering.

When we asked this question in 2005, we had one additional choice, "Deploying and using e-Learning tools and technologies," but no one selected it and so we dropped it from this year's survey. With only one notable exception, the frequencies for the other choices were in line with last year's results. One-third of respondents selected "Improve the quality of e-Learning content" (down only 3% from last year) and showed once again that content-related issues remain high on the agenda. We do note, however, that extending the global reach of e-Learning content jumped 6% from 15% last year to 21% this year and settled into the second position of this ranking. This is an interesting and significant movement, and we wonder how much this has to do with the increasing availability of "double-byte" character sets for the Asian and Middle Eastern markets.

The "Other" list included several respondents who needed to say "All of the above," plus more specific objectives such as:

- Consolidating multiple Learning Management Systems into one
- Establishing better metrics and improving evaluation and measurement systems
- Outsourcing e-Learning production to lower-cost off-shore providers
- Replacing all instructor-led training with asynchronous e-Learning
- Standardizing all e-Learning content
- Training instructors in the use of e-Learning technologies

Q9a. Comparison among Entire Sample and Higher Education, Corporations, and e-Learning Providers

Entire Sample	Higher Education	Corporations	e-Learning Providers	
33%	52%	32%	20%	Improve the quality of e-Learning content
21%	22%	27%	12%	Extend the global reach of the e-Learning content
17%	9%	5%	41%	Increase the sale of e-Learning products to customers
13%	3%	20%	12%	Decrease project cycle times
10%	9%	11%	7%	Other
6%	5%	5%	8%	Lower the cost per hour of delivery

When we looked at the responses to this question segmented by organization type, we found significant and understandable variance in a few areas:

- Higher education much more decidedly focuses on improving content quality (52%), and their second priority is to get that content out beyond the geographic limits of their campus boundaries (22%)
- Corporations, while also primarily concerned with content quality (32%), ranked global reach (27%) and decreasing project cycle times (20%) higher than the total sample; the latter another indication of the enthusiasm for rapid e-Learning.
- E-Learning providers mostly want to sell more e-Learning products to their customers (41%) — no surprise in that finding.

Future Directions in e-Learning

In this section of the survey, we presented respondents with a series of 23 e-Learning activities, tasks, and practices and asked them to rate how much their organizations would increase or decrease these activities, tasks, and practices over the next twelve months. We gave respondents seven choices: "Significant increase," "Moderate increase," "Will stay the same," "Moderate decrease," "Significant decrease," "Does not apply," and "I do not know."

For the purpose of identifying and ranking those e-Learning practices cited by the respondents as most likely to increase in the year ahead, we removed the "Does not apply" and "I do not know" selections from the responses to Questions 10 through 32 and then recalculated the results. We used these results to create the Ranking chart for Questions 10 through 32 below. This chart shows the ranking of all 23 e-Learning activities, tasks, or practices by "Total Increase" which is the sum of the "Significant increase" and "Moderate increase" frequency percentages. This ranking offers a snapshot of how industry professionals in-the-know see the future directions in e-Learning unfolding in their organizations.

Note that three of the selections, "Rapid e-Learning," "E-Learning for informal learning," and "Embedded e-Learning" are new additions to this year's survey. We also dropped one selection from last year's survey, "Blended learning." Last year "Blended learning" ranked number one with an 88% Total Increase frequency. Since then we have continued to see ample evidence in other research that "Blended learning" will grow significantly in the year ahead.

Following this chart, we present the complete data and charts for all 23 activities, tasks, and practices. Please note that these data include the "Does not apply" and "I do not know" selections, and so the percentages for the "Significant increase" and "Moderate increase" will be skewed accordingly.

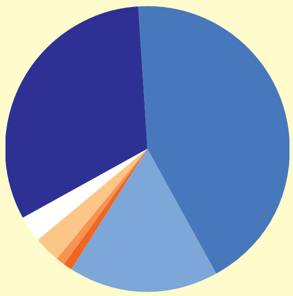
Rank		2005 Rank	Significant Increase	Moderate Increase	Total Increase
1	Rapid e-Learning design and development (Q10)	n/a	34%	45%	79%
2	Use of e-Learning to train customers and partners (Q11)	5	27%	50%	77%
3	Use of complex media in the development of e-Learning content (Q12)	2	28%	49%	77%
4	Measurement of e-Learning based on its impact on business results (Q13)	4	25%	51%	76%
5	E-Learning designed to support and/or enhance informal learning (Q14)	n/a	27%	47%	74%
6	Design of reusable modular learning objects (Q15)	3	31%	40%	71%
7	Development and delivery of asynchronous e-Learning (Q16)	8	23%	46%	69%
8	E-Learning embedded in the learner's workflow (Q17)	n/a	26%	43%	69%
9	E-Learning bundled with or embedded in products (Q18)	6	24%	43%	67%
10	Learners assessed on a regular basis (Q19)	9	24%	43%	67%
11	Use of authoring tools that allow one person to design and produce interactive e-Learning content (instead of differentiated design and production roles) (Q20)	13	23%	41%	64%
12	Content management systems (Q21)	7	24%	40%	64%
13	Project management as a critical factor in successful development and delivery of e-Learning (Q22)	12	25%	36%	61%
14	Use of design processes (Q23)	10	18%	41%	59%
15	Development and delivery of synchronous e-Learning (Q24)	11	17%	42%	59%
16	Training of instructors in synchronous e-Learning delivery skills (Q25)	14	16%	43%	59%
17	Specialization of e-Learning design and development professionals (Q26)	16	14%	42%	56%
18	Training for instructional designers (Q27)	15	13%	41%	54%
19	Work-share relationship development of e-Learning (Q28)	17	16%	36%	52%
20	Customizing off-the-shelf content (Q29)	18	12%	37%	49%
21	The size of design and development teams (Q30)	19	8%	37%	45%
22	Outsourcing or out-tasking the design and development of e-Learning content (Q31)	20	15%	30%	45%
23	Focus on instructor-led classroom-based training (Q32)	21	4%	11%	15%

Future Directions in e-Learning

When reviewing these findings, it is hard to avoid the conclusion that just about everything “e-Learning” is on the increase. Clearly, we have a vibrant and growing professional practice in most areas, with the understandable exception of instructor-led classroom-based training. To make sense of the trends, however, it is useful to think in terms of the relative frequency of increase. For example, if we look at the chart in terms of quartiles, we can segment those activities, tasks, and practices in groups that do hint at those areas that will grow, get the community’s attention, and most likely a goodly portion of the budget allocations relative to other groups.

10. Rapid e-Learning design and development

- 32% Significant increase
- 43% Moderate increase
- 17% Will stay the same
- 1% Moderate decrease
- 1% Significant decrease
- 3% I do not know
- 3% Does not apply



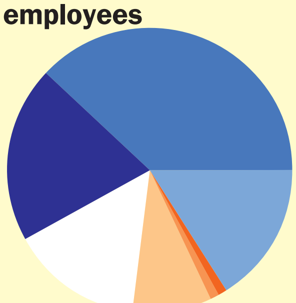
Rank # 1: 79% Total Increase

(After removing “I do not know” and “Does not apply” selections)

Last year we did not include rapid e-Learning as one of the activities, tasks, and practices, and now, appearing for the first time in this current survey, it has made its debut in the number one spot.

11. Use of e-Learning to train customers and partners in addition to employees

- 20% Significant increase
- 38% Moderate increase
- 16% Will stay the same
- 1% Moderate decrease
- 1% Significant decrease
- 9% I do not know
- 15% Does not apply



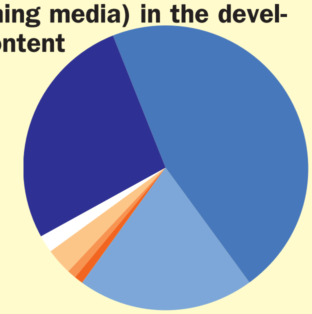
Rank # 2: 77% Total Increase

(After removing “I do not know” and “Does not apply” selections)

Could this be the breakout year for customer and partner training? This practice moved up the ranks from number five last year to number two this year, and 5% in frequency as well. Other Guild research has shown that many organizations are increasing their ability to re-use content for multiple audiences and are finding it easier to extend delivery systems. These factors may be driving the growth of e-Learning in this relatively new area of service.

12. Use of complex media (e.g., simulations, collaborative tools, databases, algorithmic interactions, Flash, and streaming media) in the development of e-Learning content

- 27% Significant increase
- 46% Moderate increase
- 20% Will stay the same
- 1% Moderate decrease
- 1% Significant decrease
- 3% I do not know
- 2% Does not apply



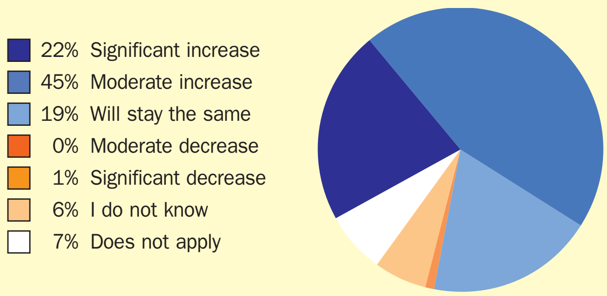
Rank # 3: 77% Total Increase

(After removing “I do not know” and “Does not apply” selections)

We are not surprised to see that a significant majority (77%) of respondents’ organizations will increase their use of complex media in the development of e-Learning content. This finding supports the general tendency towards greater focus on improving the quality of content (Refer to Question 9).

Future Directions in e-Learning

13. Measurement of e-Learning based on its impact on business results.

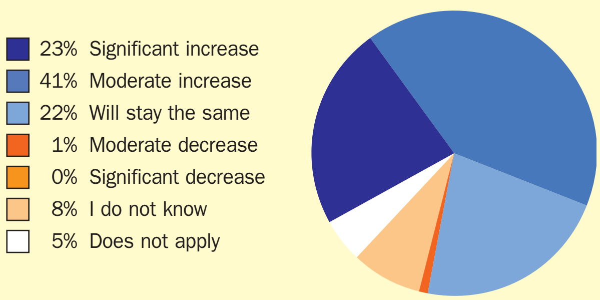


Rank # 4: 76% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Finishing near the top, but just out of the money, measuring the business results affected by e-Learning continues to be an important priority. As indicated in the commentary of Question 9, we suspect that the corporate respondents are driving this frequency up in the rankings.

14. E-Learning designed to support and/or enhance informal learning.

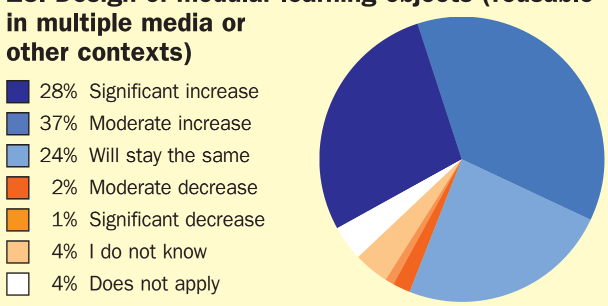


Rank # 5: 74% Total Increase

(After removing "I do not know" and "Does not apply" selections)

This choice was a new addition to this year's survey as we have been seeing many indications that e-Learning programs would be providing greater support for informal learning activities. These findings bear out these indicators. It will be interesting to see what form these design efforts take, especially with 74% of respondents' organizations increasing the practice.

15. Design of modular learning objects (reusable in multiple media or other contexts)

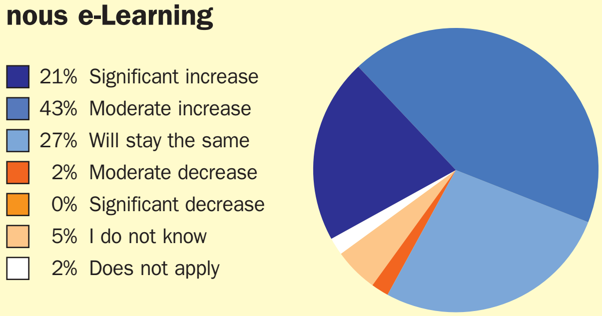


Rank # 6: 71% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Given the priority that content received elsewhere in this survey, it is not surprising to see that design of modular learning objects is increasing as much as it is. This finding likely relates to the increase of rapid learning and the desire by many organizations to reduce content development cycle times.

16. Development and delivery of asynchronous e-Learning



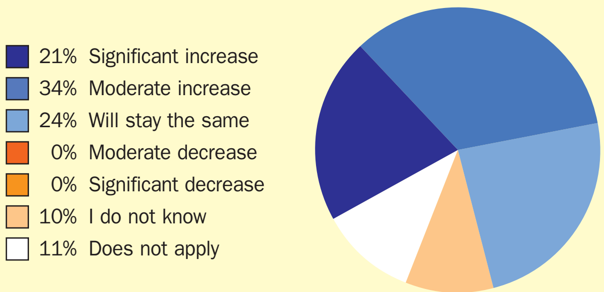
Rank # 7: 69% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Asynchronous development and delivery remains an important practice, ranking # 7, one higher than last year. There seems to be little doubt that the volume of e-Learning content out there is growing significantly every year.

Future Directions in e-Learning

17. E-Learning embedded in the learner's workflow

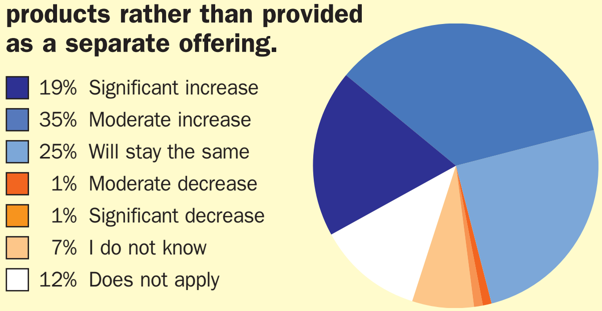


Rank # 8: 69% Total Increase

(After removing "I do not know" and "Does not apply" selections)

This choice was a new addition to this year's survey. Some see workflow learning as a way to support informal learning, and also as a way to bring learning directly to the worker in the context of the job. With greater focus on performance and business results, we expected this practice to be on the rise and it seems that it will be for 69% of respondents' organizations.

18. E-Learning bundled with or embedded in products rather than provided as a separate offering.

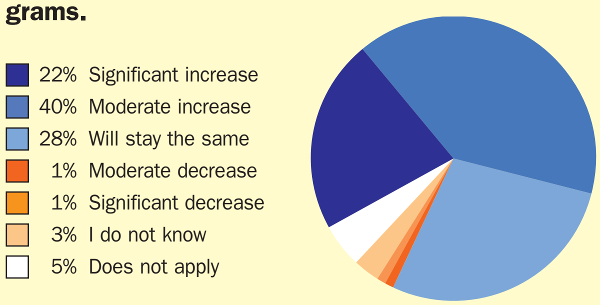


Rank # 9: 67% Total Increase

(After removing "I do not know" and "Does not apply" selections)

We expected that this practice might rank higher than it did last year, but in fact it dropped in percentage frequency from 72% to 67% and from rank #6 to rank #9. Nonetheless, embedding e-Learning in a product creates a more "work-flow"-centric learning intervention modality, and we do expect to see more and more of this type of e-Learning in the future, just as the data suggest.

19. Learners assessed on a regular basis to determine the effectiveness of e-Learning programs.

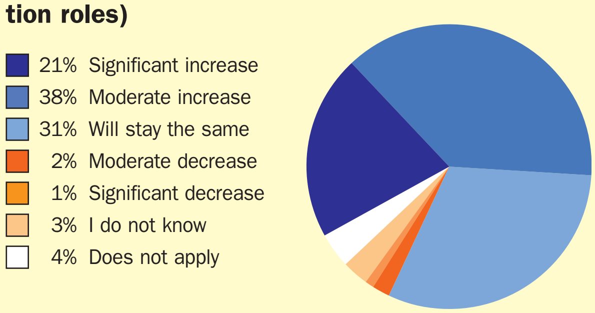


Rank # 10: 67% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Assessing learning is the Kirkpatrick Level 2 criterion for evaluating the effectiveness of a training program. Again, this practice ranks in the top ten among respondents.

20. Use of authoring tools that allow one person to design and produce interactive e-Learning content (instead of differentiated design and production roles)



Rank # 11: 64% Total Increase

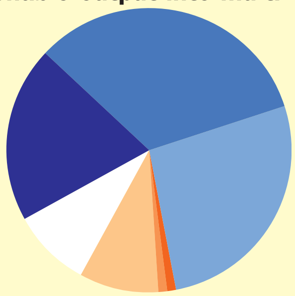
(After removing "I do not know" and "Does not apply" selections)

Could that one person be a subject matter expert or an instructor? Even if it is an instructional designer or course developer, this level of increase also points to demand for rapid e-Learning and reduced cycle time. It also perhaps speaks to the need for less complex authoring tools that can put design power into the hands of subject matter experts.

Future Directions in e-Learning

21. Processes and systems, such as content management systems, deployed to facilitate the reuse of content and to enable output into multiple media formats.

- 20% Significant increase
- 33% Moderate increase
- 27% Will stay the same
- 1% Moderate decrease
- 1% Significant decrease
- 9% I do not know
- 9% Does not apply



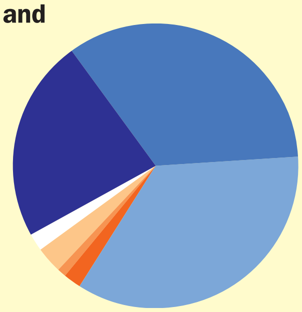
Rank # 12: 64% Total Increase

(After removing "I do not know" and "Does not apply" selections)

This practice showed a decline over last year, dropping from #7 to #12 in the ranking and 5% in the Total Increase percentage frequency. On the other hand, less than 2% of respondents' organizations will be decreasing their deployment of content management systems.

22. Project management as a critical factor in successful development and delivery of e-Learning

- 23% Significant increase
- 34% Moderate increase
- 35% Will stay the same
- 2% Moderate decrease
- 1% Significant decrease
- 3% I do not know
- 2% Does not apply



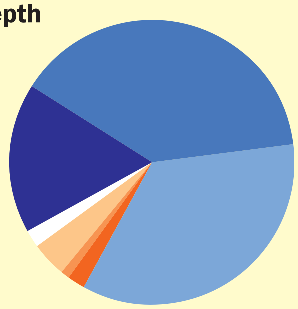
Rank # 13: 61% Total Increase

(After removing "I do not know" and "Does not apply" selections)

The increasing specialization of e-Learning professionals (Refer to Question 16) would seem to be one of several factors driving the increasing importance of project management. Increasing staff size would be another (Refer to Question 15).

23. Use of design processes (e.g. application of learning theory, selection of appropriate media and interactions, or in-depth audience analysis)

- 17% Significant increase
- 39% Moderate increase
- 35% Will stay the same
- 2% Moderate decrease
- 1% Significant decrease
- 4% I do not know
- 2% Does not apply



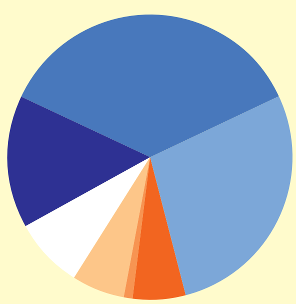
Rank # 14: 59% Total Increase

(After removing "I do not know" and "Does not apply" selections)

This finding indicates that the professional remains committed to taking design to higher levels and supports other data from this survey suggesting that improving content quality is a major priority. The fight against learning by PowerPoint rages on.

24. Development and delivery of synchronous e-Learning

- 15% Significant increase
- 36% Moderate increase
- 28% Will stay the same
- 6% Moderate decrease
- 1% Significant decrease
- 6% I do not know
- 8% Does not apply



Rank # 15: 59% Total Increase

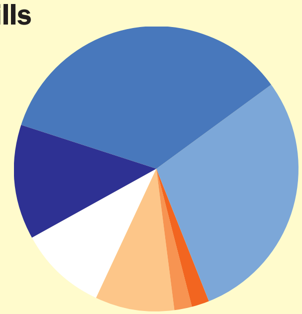
(After removing "I do not know" and "Does not apply" selections)

Synchronous e-Learning is not far behind asynchronous learning in frequency of increase (59% versus 69%), yet it did fall in the ranking from #11 to #15. There are also a significant number of respondents' organizations for whom synchronous e-Learning does not apply (8%), 6% more than asynchronous e-Learning (Refer to Question 25).

Future Directions in e-Learning

25. Training of instructors in synchronous e-Learning delivery skills

- 13% Significant increase
- 35% Moderate increase
- 29% Will stay the same
- 2% Moderate decrease
- 2% Significant decrease
- 9% I do not know
- 10% Does not apply



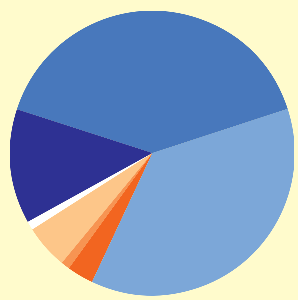
Rank # 16: 59% Total Increase

(After removing "I do not know" and "Does not apply" selections)

The increase in training of instructors in synchronous e-Learning delivery skills (59%) is commensurate with the increase in synchronous e-Learning (Refer to Question 26), as would be expected.

26. Specialization of e-Learning design and development professionals

- 13% Significant increase
- 40% Moderate increase
- 37% Will stay the same
- 3% Moderate decrease
- 1% Significant decrease
- 5% I do not know
- 1% Does not apply



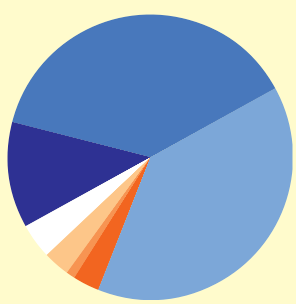
Rank # 17: 56% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Just over half of the respondents (53%) report that that professional specialization is on the rise. This finding relates to Question 15, and we wonder whether the increased need for specialization relates to the increases in the size of the staff in our respondents' organizations.

27. Training for instructional designers

- 12% Significant increase
- 38% Moderate increase
- 39% Will stay the same
- 3% Moderate decrease
- 1% Significant decrease
- 3% I do not know
- 4% Does not apply



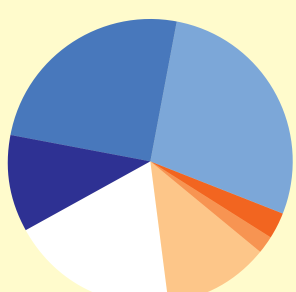
Rank # 18: 54% Total Increase

(After removing "I do not know" and "Does not apply" selections)

We have seen in other Guild research that instructional designers readily embrace professional development opportunities, whether they are self-directed and informal or provided formally by their employers. This indicator of a 50% increase reflects these findings.

28. Development of e-Learning utilizing a work-share relationship, whereby the hiring organization does significant work with internal resources, and then works with a vendor to accomplish other significant work

- 11% Significant increase
- 25% Moderate increase
- 28% Will stay the same
- 3% Moderate decrease
- 2% Significant decrease
- 12% I do not know
- 19% Does not apply



Rank # 19: 52% Total Increase

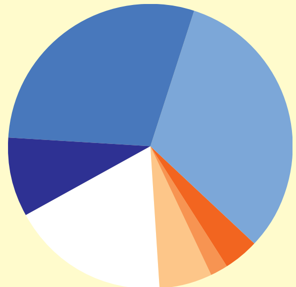
(After removing "I do not know" and "Does not apply" selections)

This practice, a form of outsourcing or out-tasking, will see an increase among 42% of respondents organizations. Note that 19% of respondents reported that this practice did not apply to their organizations, more than for any other practice with the exception of outsourcing in general (Refer to Question 23) with which it is causally linked.

Future Directions in e-Learning

29. Tailoring or customizing of off-the-shelf content rather than starting design and development efforts from scratch

- 9% Significant increase
- 29% Moderate increase
- 32% Will stay the same
- 4% Moderate decrease
- 2% Significant decrease
- 6% I do not know
- 18% Does not apply



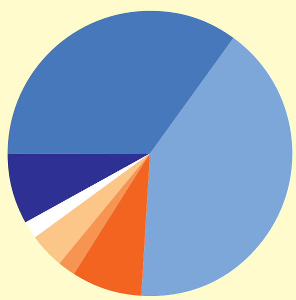
Rank # 20: 49% Total Increase

(After removing "I do not know" and "Does not apply" selections)

This chart shows a relatively high number of "Does not apply" responses. Almost half (49%) of respondents will increase their customization of off-the-shelf content among those organizations that do tailor and customize off the shelf. Now we wonder how much of an increase in efforts started from scratch there will be.

30. The size (based on the number of people) of design and development teams

- 8% Significant increase
- 35% Moderate increase
- 41% Will stay the same
- 8% Moderate decrease
- 2% Significant decrease
- 4% I do not know
- 2% Does not apply



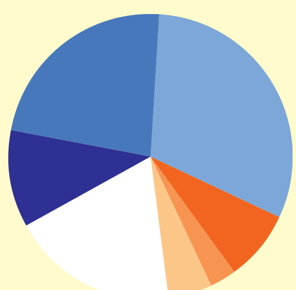
Rank # 21: 45% Total Increase

(After removing "I do not know" and "Does not apply" selections)

Although not many of the respondents' organizations will decrease (10%) the size of their design and development teams, a good portion (41%) will stay the same. For those who are increasing staff (43%), we wonder what skills and capabilities they are looking for.

31. Outsourcing or out-tasking the design and development of e-Learning content

- 11% Significant increase
- 23% Moderate increase
- 31% Will stay the same
- 8% Moderate decrease
- 3% Significant decrease
- 5% I do not know
- 19% Does not apply



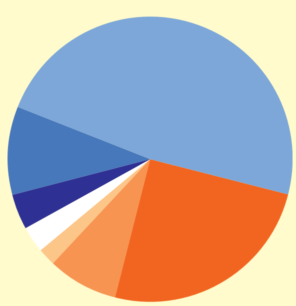
Rank # 22: 45% Total Increase

(After removing "I do not know" and "Does not apply" selections)

There remains a significant number of organizations who simply do not do outsourcing (19%), despite its important and value to many organizations. (Refer to the Guild's The Learning Outsourcing Research Report 2005.) Yet, 45% of those who do will increase their level of outsourcing or out-tasking in the year ahead.

32. Importance of, and focus on, instructor-led classroom-based training

- 4% Significant increase
- 10% Moderate increase
- 48% Will stay the same
- 25% Moderate decrease
- 8% Significant decrease
- 2% I do not know
- 3% Does not apply



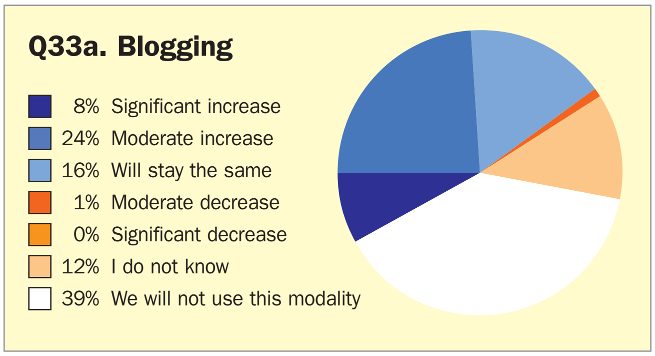
Rank # 23: 15% Total Increase

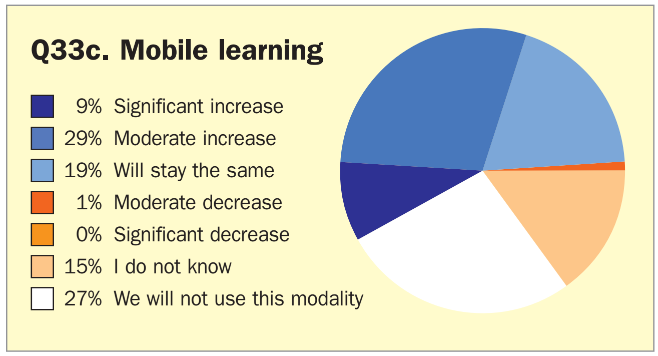
(After removing "I do not know" and "Does not apply" selections)

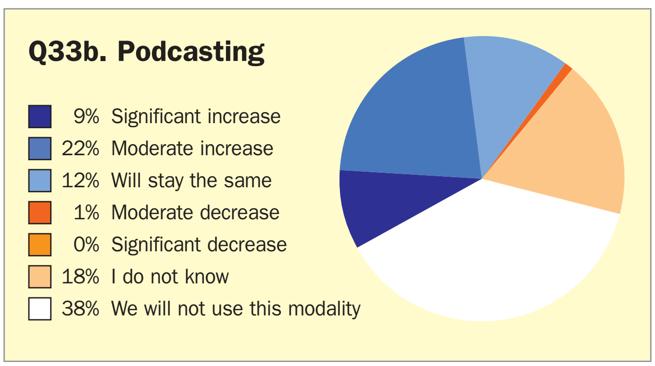
Once again, traditional instructor-led classroom-based training comes up dead last with only 15% of respondents indicating that their organizations will put increased attention on this activity. In contrast with all the other selections, it is also the only one for which high percentages of respondents selected the two "decrease" choices.

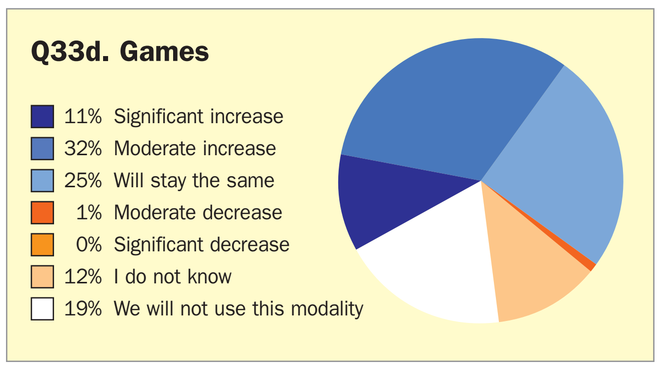
New e-Learning Modalities

This year we introduced a set of questions about four newly-emerging e-Learning modalities: “Blogging,” “Podcasting,” “Mobile learning,” and “Games.” Generally speaking, these modalities are in an early stage of adoption with about one-third of respondents’ organizations increasing their use of “Blogging” (32%) and “Podcasting” (31%), with slightly more using “Mobile learning” (38%) and “Games” (43%). We also can see that the level of “non-use” is quite high among all four modalities. It will be interesting to see how these practices develop and mature in the year ahead.









To Learn More About This Subject

To learn more about this subject, we encourage you to search the following pages on the Guild’s Website using the keywords, “future” and “trends.”

The Resource Directory: http://www.e-LearningGuild.com/resources/resources/index.cfm?actions=viewcats

The e-Learning Developers’ Journal: http://www.e-LearningGuild.com/articles/abstracts/index.cfm?action=view

This survey generated responses from over 650 Members and Associates; these results are statistically significant and can be generalized to the entire Guild membership.

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.

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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 more than 20,000 Members and Associates 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 Guild's Learning Solutions e-Magazine is the premier weekly online publication of *The eLearning Guild*. *Learning Solutions* 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:

April 18 - 21, 2006
BOSTON

April 18 - 21, 2006
BOSTON

April 18 - 21, 2006
BOSTON

Thursdays
ONLINE

October 10 - 13, 2006
SAN FRANCISCO

October 10 - 13, 2006
SAN FRANCISCO