



Pre-meeting survey :
The Future of Corporate eLearning

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The big question

What will be the dominant influences in e-Learning the next 3–5 years?

- in technologies,
- from the suppliers, and
- for buyers & learners?

Survey background

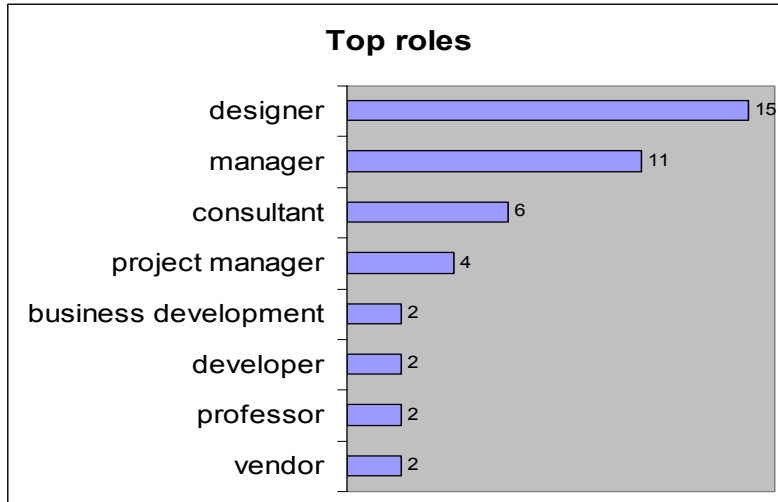
- Web-based survey on e-LF site
- 5 days, 48 responses
 - 22 remote attendees
 - 7 in-person regulars
 - 5 attend either
 - 14 non-attendees

How do you typically attend the e-Learning Forum meetings?

in-person	7
Remote	22
Both	5
Neither	14

Demographics

- 38 US, 10 rest of world



Where are you personally based?

north-america	38
Scandinavia	4
south africa	2
Britain	2
asia-pacific	1
new zealand	1

Which of the following best describes your role?

Instructional designer	15	<i>* 3 respondents listed this and one or more other roles</i>
Manager	11	<i>* 1 listed this in conjunction with another role</i>
Consultant	6	
project manager	4	<i>* 2 listed this with other roles</i>
business development	2	
Instructional developer	2	<i>* 1 developer / manager</i>
Professor	2	
Vendor	2	
CEO	1	
Director	1	
consultant (in-house)	1	
Learning architect	1	
LMS designer	1	
Trainer	1	
Student/other	2	

Corporate demographics

Industry

Prof. services	19
Information Tech.	10
Education	3
Non-Profit	3
Government	2
Retail	2
Training	2
+ 8 others...	

Employees

1 - 49	22
50 - 99	1
100 - 499	9
500 - 999	4
1000 - 4999	7
5000 - 9999	5
10K+	0

Which of the following best describes your organization's primary focus?

Manufacturing

Utility

Professional Service Provider

Information Technology Developer

Retail / Distribution

Government

Non-profit organization

Transportation

Other [please specify:]

How many employees are at your location?

1-49 employees

50-99 employees

100-499 employees

500-999 employees

1,000-4,999 employees

5,000-9,999 employees

10,000 or more employees

E-Learning usage

How employed

Tactically	24
To customer/vendor	21
To employees	13
Using "advanced" tools (e.g. LCMS)	17
Just exploring	6
Don't know	3

Which technologies

Authoring tools	30
LMS	27
Synchronous	25
Packaged content	21
Hosting service	21
Streaming video	17
LCMS	16
Learning Obj. authoring	15
Mobile	7
Satellite	2
Other	6

Which of the following describe how eLearning is being used in your location? (check all that apply)

In early phases of exploring/considering eLearning technologies

Using eLearning "tactically" to meet certain training needs

Using eLearning enterprise-wide to support workforce development

Using eLearning to support supplier and customer-focused learning

Using advanced eLearning technologies, including learning object-based systems (e.g. LCMS)

Don't know

What types of eLearning technologies are being used in your location? (check all that apply).

Off-the-shelf eLearning content

eLearning content authoring tools

Learning Management Systems (LMS)

Vendor- (or ASP-) hosted eLearning platforms

Learning Content Management Systems (LCMS)

Learning object authoring tools

Web-based synchronous eLearning platforms ("virtual classrooms")

Satellite-based virtual classrooms

Streaming video platforms

Mobile/Wireless eLearning technologies

Other:

•*eGame Authoring Systems*

•*email marketing w/ learning applications*

•*web-based asynchronous using multiple technologies*

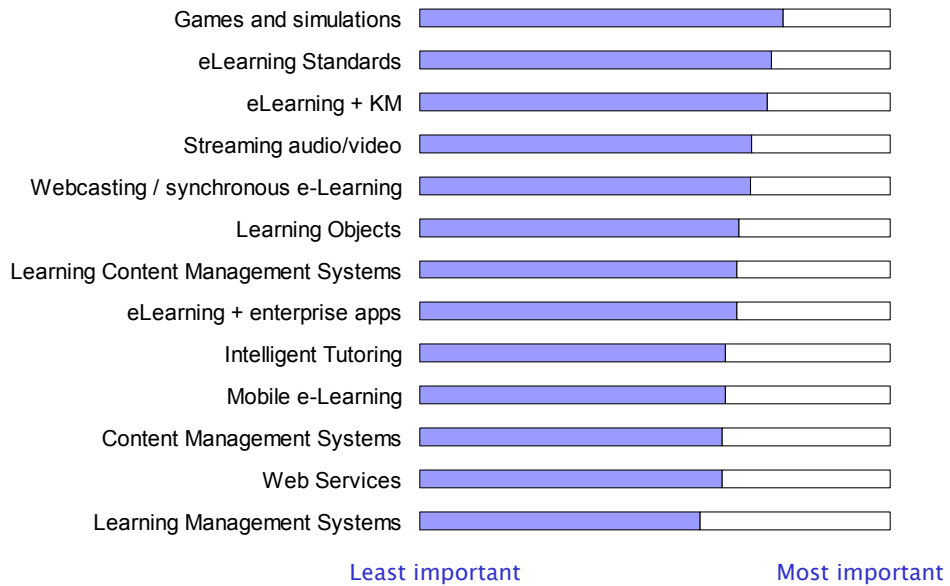
•*online performance support tools*

•*AEPS on home-grown LMS*

•*videoconferencing via ISDN and IP*

Technology, Systems, and Content Design

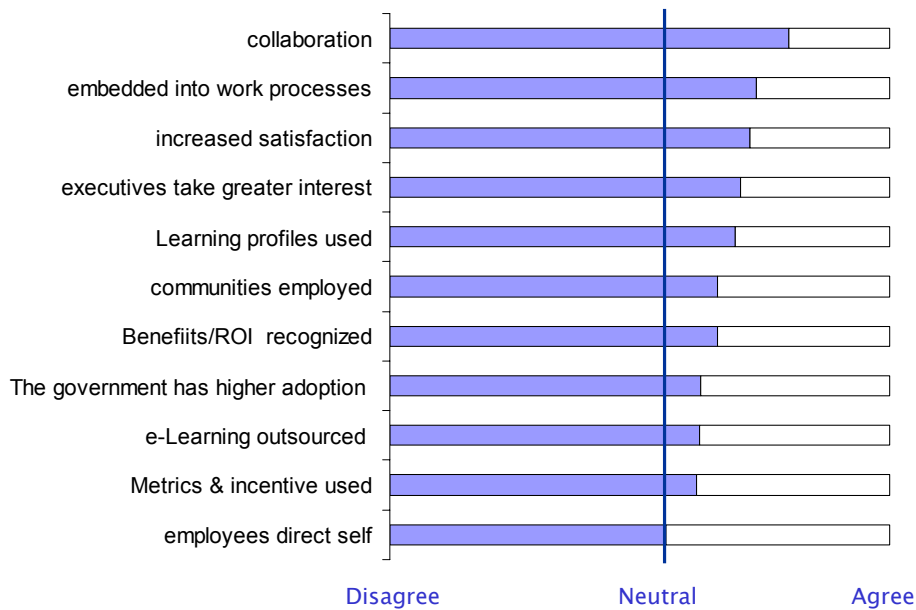
Importance over next 3-5 years



Please indicate how important a factor you feel the technologies/systems/approaches below will be for how corporate e-learning will evolve in the next 3-5 years: (1: least important 5: most important)

	<i>average</i>
Learning Management Systems	3.0
Learning Content Management Systems	3.4
Learning Object-Based Content	3.4
Convergence of eLearning and KM systems	3.7
Convergence of Digital Content Management and eLearning Management Systems	3.2
Convergence of eLearning and Enterprise Applications (such as ERP, CRM, SCM, etc)	3.4
Streaming Audio and Video	3.5
Webcasting/Virtual Classrooms/Synchronous eLearning	3.5
Games and Simulations-Based eLearning	3.9
Mobile eLearning	3.3
Web Services	3.2
Intelligent Tutoring	3.3
eLearning Standards	3.7

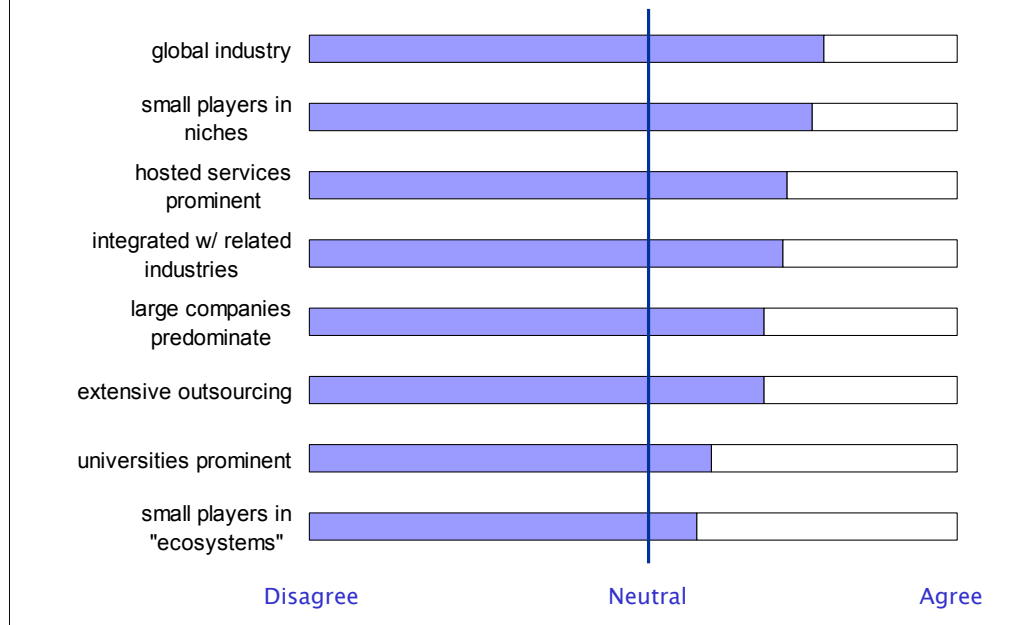
Demand Side/User (Learner)/Buyer Issues



Please indicate how important a factor you feel the issues and factors below will be for how corporate e-learning will evolve in the next 3-5 years: (1: Strongly disagree, 4: Neutral, 7: Strongly agree)

Issue	average
eLearning will be Much Higher on the Executive Radar Screen	4.9
Learners will Find eLearning much more Satisfying and Useful	5.0
Learning Profiles and Personalized Learning Paths will be very common	4.8
The Benefits and ROI of eLearning will be more Clear and Recognized	4.6
Learning and Training will be Less of a Corporate Concern as Employees will be Empowered and Expected to take Charge	3.9
Corporations will outsource most of eLearning-related systems and services	4.3
Learning Communities (and/or Communities of Practice) will be common and popular	4.6
Learner will use a variety of collaboration tools and technologies in their work	5.6
eLearning will be highly embedded in work processes	5.1
Metrics and incentive systems will be common and will stimulate active learning	4.3
The government will have higher elearning adoption than the private sector	4.4

Supply Side/Industry Competitive Issues



Please indicate how important a factor you feel the issues and factors below will be for how corporate e-learning will evolve in the next 3-5 years (1: Strongly disagree, 4: Neutral, 7: Strongly agree)

Issue	average
Small eLearning Companies will still have a significant presence in the industry	* note
Large Technology Companies will dominate the eLearning industry	4.9
Extensive outsourcing of eLearning-related systems and services will greatly benefit large technology companies	4.9
Small players will only survive by being part of a small number of "ecosystems" built around large technology companies	4.2
Small, innovative players will find important niches (e.g. in games and simulations-based eLearning)	5.4
Universities will play a much more important role on the corporate eLearning scene	4.3
The eLearning Industry will be much more global	5.6
The eLearning Industry will be highly integrated with other related segments of the enterprise software Industry (e.g. KM and collaboration technologies)	5.1
The LMS segment as we know it will be a relatively small part of the overall "learning industry"	* note
Hosted services will be a major segment of the "new" eLearning industry 3-5 years from now	5.2

Due to an error in the survey form, these two results cannot be reported.