



*Presented by*

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# Digging into the Realities of Digital Learning

## Research & Panel Discussion

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KEEP  
CALM  
AND  
CHECK  
THE FACTS

What are the *facts* about  
**Digital Learning ?**

# FREE to Download

## 2018 Digital Learning Research

<http://www.fosway.com/research/next-gen-learning/digital-learning-european-realities/>

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**learning technologies**

*in association with*

### Digital Learning Realities Research 2018

**How prepared are you for the impact of GDPR on your learning system?**

**"Only 18% of L&D effort goes on developing performance. This is a systemic weakness that needs to be addressed."**

**Focus of L&D effort**

- Operational Learning (31%)
- Future Capability (31%)
- Personal Learning (20%)
- Performance Development (18%)

**"Whilst investment in digital learning is increasing, it is still small compared to wider HR and business investment."**

**Investment in digital learning to change in 2018**

**"Only 6% of L&D organisations are currently prepared for GDPR. Is this a ticking time bomb?"**

**"85% of organisations have a fragmented ecosystem for digital learning, but standardisation is critical to many organisations. So what's the way forward?"**

**How standardised is your approach to digital learning across your organisation?**

**"Personalisation and microlearning are growing, but are far from mainstream. Gamification continues to lag despite the hype, as does curated content."**

**How is your adoption of the following learning approaches likely to change over the year ahead?**

**Top 5 areas of demand**

**Content**

- Video (60%)
- Mobile (59%)
- User Generated (60%)
- Microlearning (59%)
- Blended Learning (57%)

**Platforms**

- Learner Engagement (64%)
- Social/Collaborative (63%)
- Mobile (61%)
- Analytics (60%)
- Authoring Systems (57%)

**"Customer experience is still a major issue, reflecting challenges in corporate implementation as well as poor vendor decisions."**

**Quality of digital learning from suppliers**

**Content**

- Bespoke E-learning
- Content Hosting
- Video
- Business Systems Simulations

**Content**

- Virtual & Augmented Reality
- Gamification & Badges
- Serious Games
- Performance Support

**Platforms**

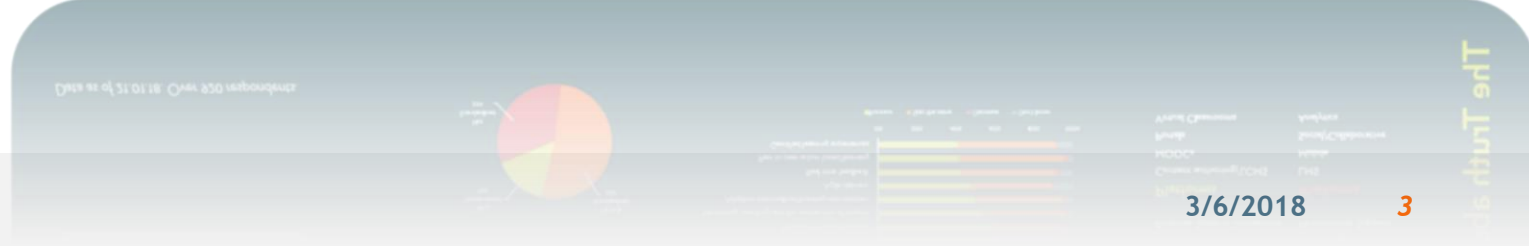
- Content authoring/LCMS
- MOOCs
- Portals
- Virtual Classrooms

**Platforms**

- LMS
- Mobile
- Social/Collaborative
- Analytics

Data as of 21.01.18. Over 920 respondents.

The Truth about Digital Learning...



# DIGITAL LEARNING IN EUROPE - 2018 RESEARCH

Unique market data from Fosway's strategic research partnership with

learning  
technologies

**38%** Respondents from  
Organisations  
> 5000 Employees



**79%**  
of respondents  
**European**  
(11% APAC)

**61%** Respondents from  
Organisations  
> 1000 Employees

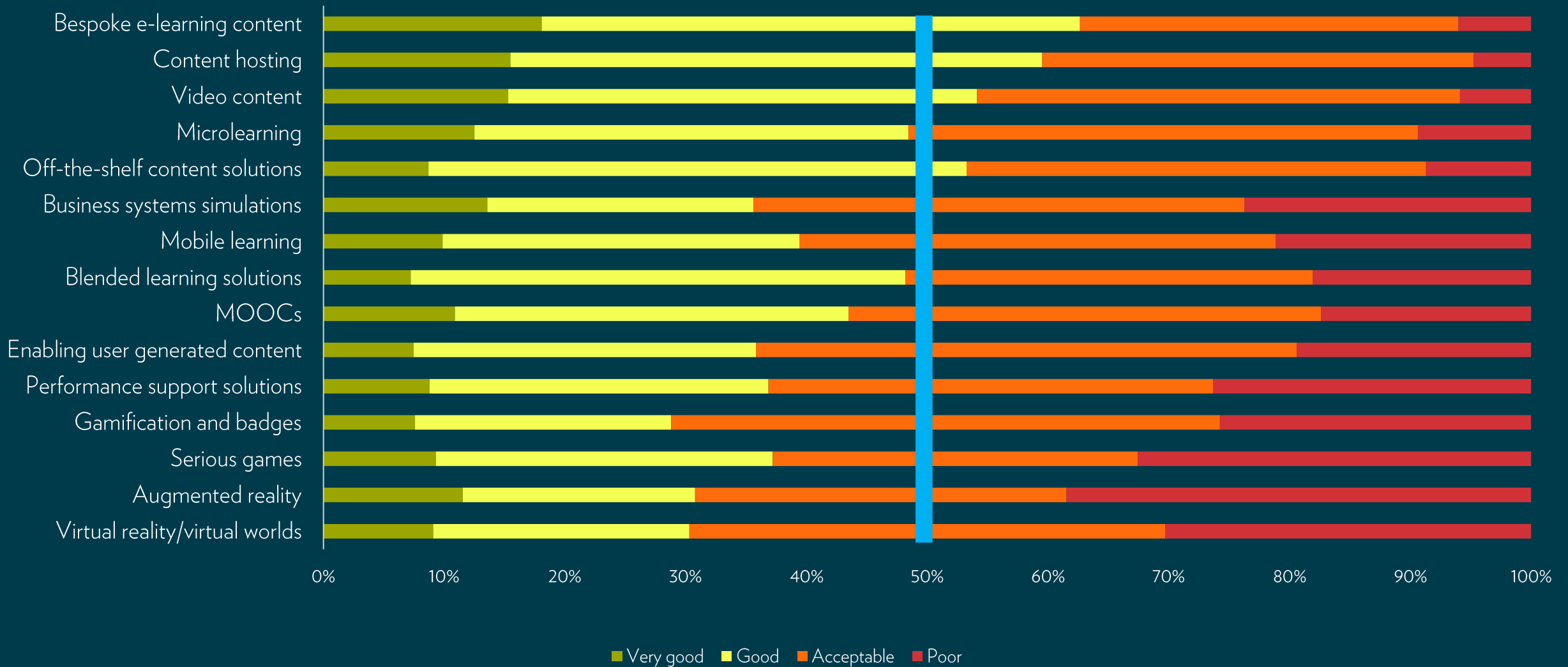
*Approx. 1300 survey respondents overall*



# Our Experience of Digital Learning Content

# YOUR EXPERIENCE OF DIGITAL LEARNING CONTENT

How do you rate the quality of digital learning content you get from your suppliers?



# Why is the CUSTOMER'S VIEW OF CONTENT so variable?

- ▶ What do you do to maximise the quality of your learning solutions?
- ▶ How has that changed over the years?
- ▶ How do you manage innovation in “new” forms of content?



# Your Digital Learning Tech Ecosystem

How do you manage solution diversity?

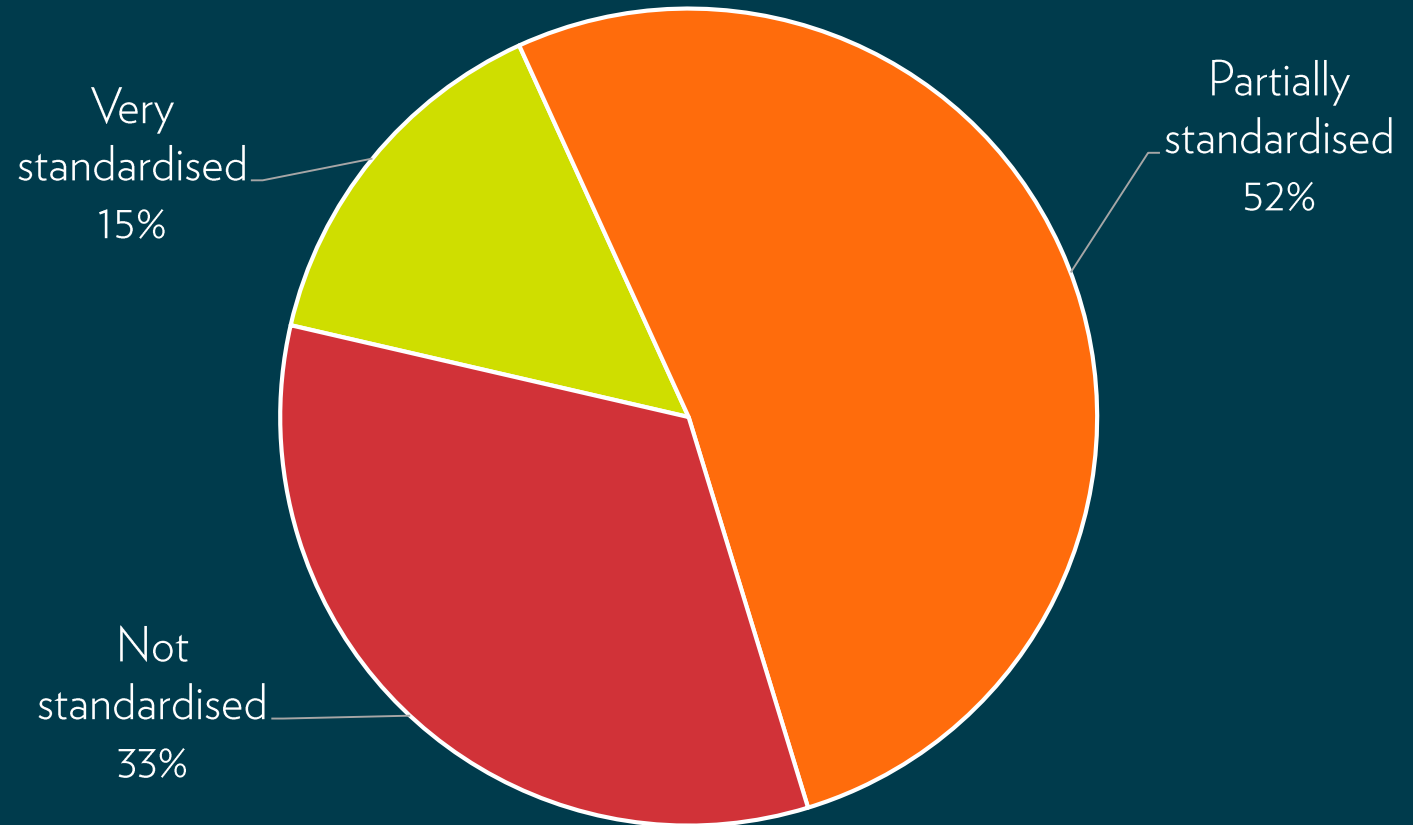




Most have a  
fragmented  
ecosystem - 85%

Is the level of standardisation a  
problem, or should we be  
reveling in diversity?

## How standardised is your approach to digital learning across your organisation?



# Should we be striving for single suite solutions for Learning and Talent?

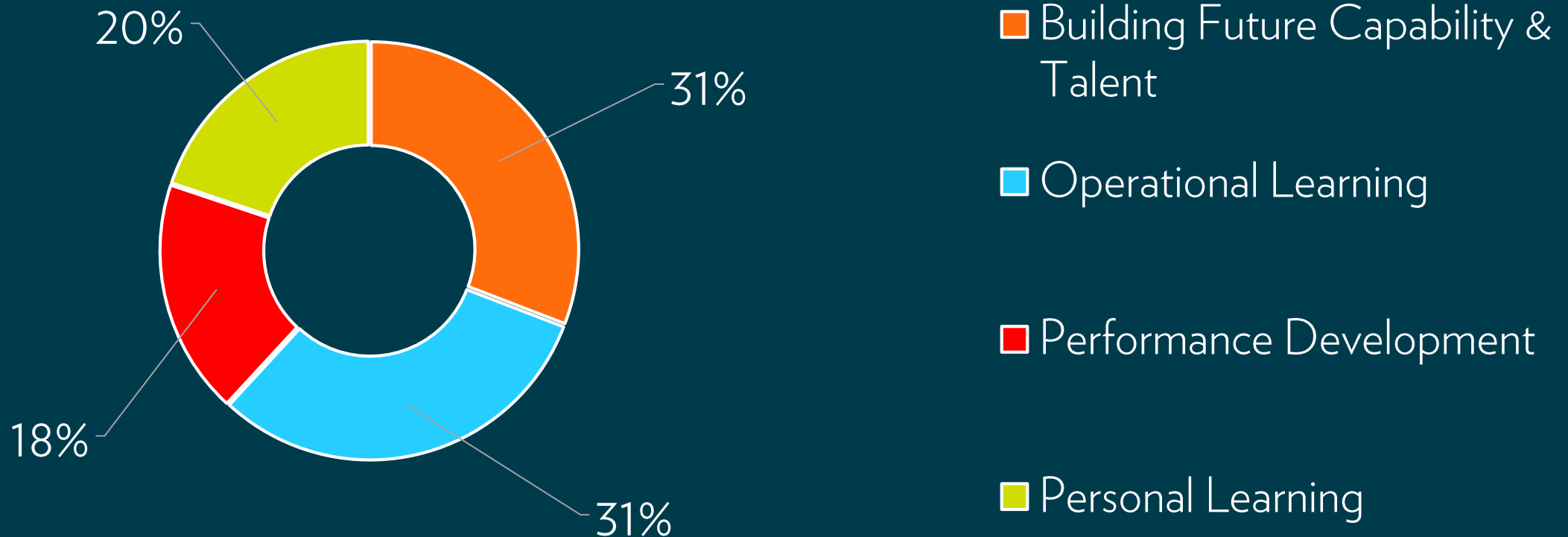
- ▶ What's the biggest challenge with your solutions ecosystem?
- ▶ How do you manage diversity in your Learning Tech...?



# Learning Investment - Where should you invest?

What's the right split for investing in developing -  
Future Capability v Personal Development v  
Operational Learning v Performance  
Development?

# Approximately, what percentage of L&D effort is invested delivering...



# LEARNING INVESTMENT

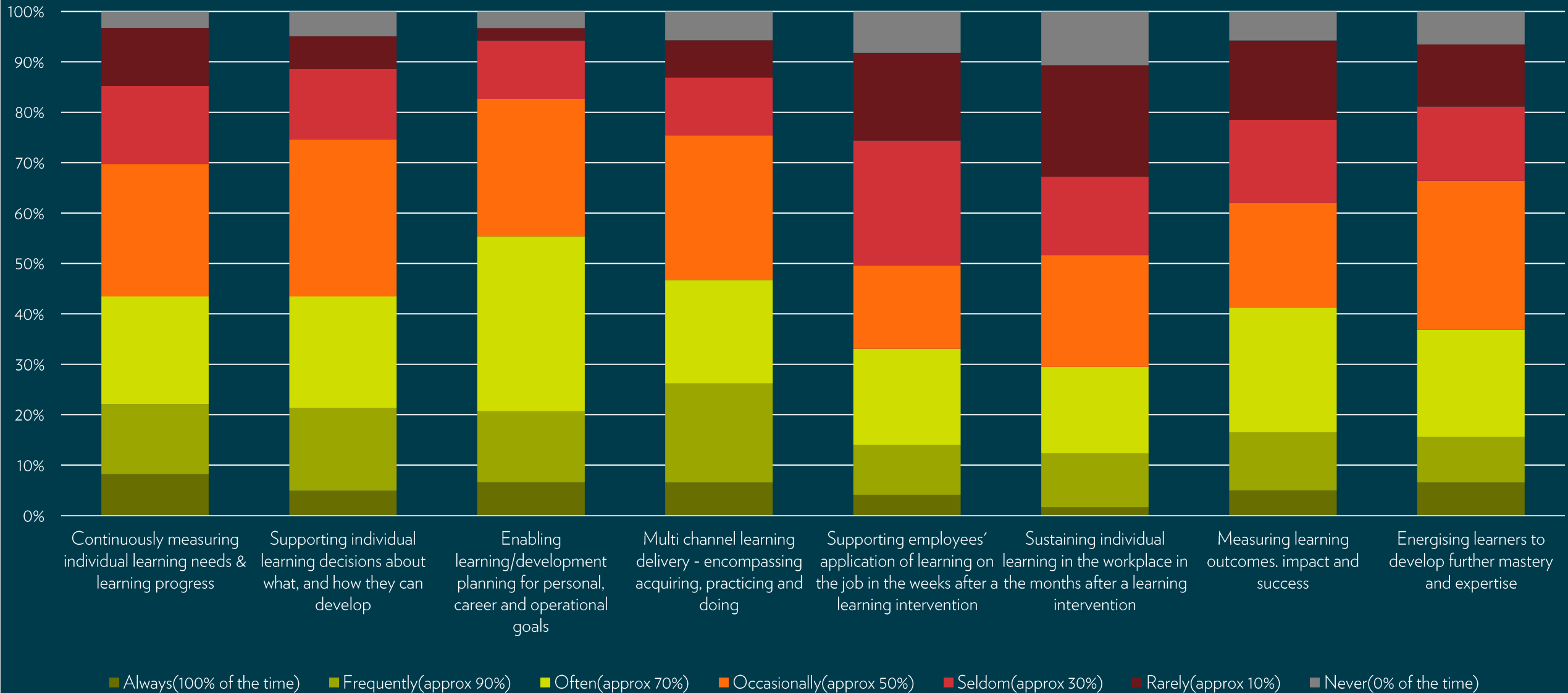
- ▶ How do you make sure you are investing the right amount in the right areas for your business?
- ▶ What does good look like for YOU?



# Supporting the more AGILE Learning

What's important to you?

# Approximately how often does your approach to L&D support the following?



# The reality is that L&D do too little to create effective learning



Less than 1/3<sup>rd</sup> more often support learners' application of learning in the workplace.



Less than 1/3<sup>rd</sup> look to sustain learning in the workplace



More than 55% fail to consistently measure learning progress

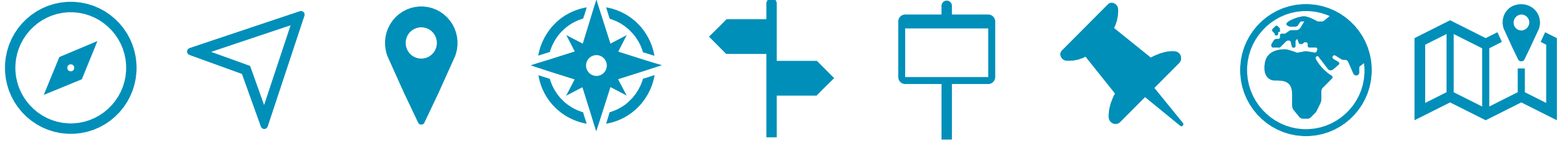


60% are failing to systematically drive the development of mastery and expertise.



Only 45% more than often adopt multi-channel learning delivery.





- 90% of L&D professionals expect managers to take responsibility for skill development after the learner has been trained (CCL)
- BUT - only 15% of leaders are satisfied that managers are effectively coaching and developing the skills of learners in the field (ATD)

**Does 70:20:10 have the dice loaded against it?**

# How important is it that you support learning into the workflow?

- ▶ What are you doing to support that?
- ▶ What lessons have you learned from your experience of workflow learning so far?



# Digital Learning Directions

Where next for your Digital Learning?

# Digital Learning – Top Growth Areas

## Content

Video (66%)

User-generated (60%)

Microlearning (59%)

Mobile (59%)

Blended learning (57%)

## Learning Platforms

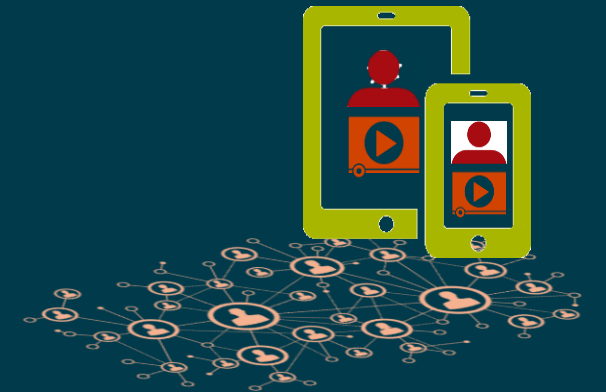
Learner engagement (64%)

Social/collaborative (63%)

Mobile (61%)

Analytics (60%)

Authoring systems (57%)



# How are your solutions shifting and what is driving that?

- ▶ What has been the most radical changes you have made in your approach to Learning Tech in your organisation?
  
- ▶ Of all the changes you've made what have had the most...
  - *negative impacts ?*
  - *positive impacts?*

- ▶ **What are you doing now that most excites you about the future of Learning in your organisation..**

# SUMMARY

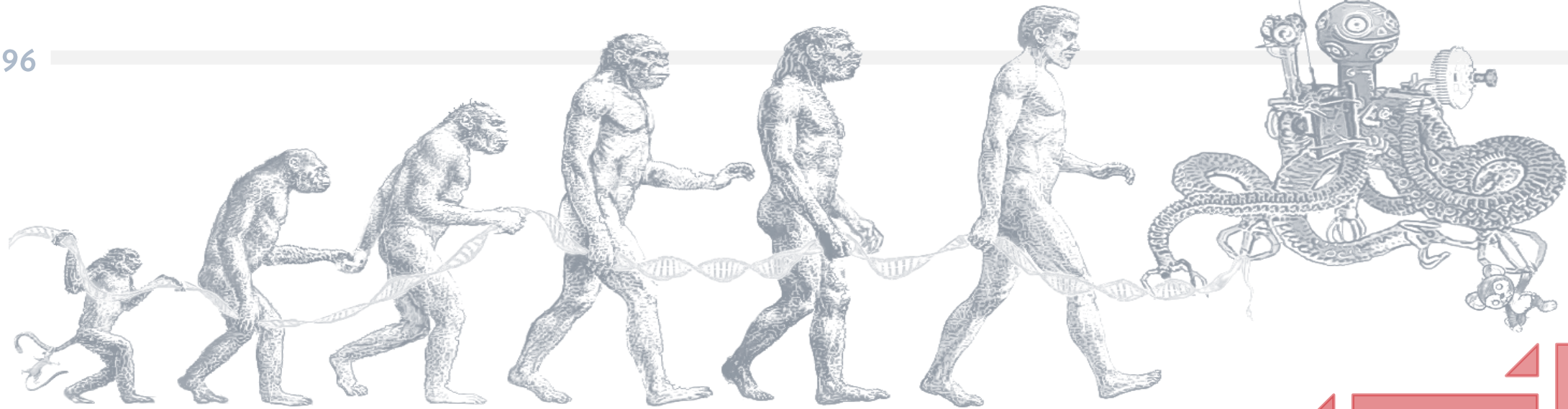


We can get this right, if we **THINK** about it!

# The Evolution of Learning Strategy & Systems

1996

2020



PLIOPITHECUS  
25 MillionsYears

RAMAPITHECUS  
5 MillionsYears

AUSTRALOPITHECUS  
1.9 MillionsYears

HOMO ERECTUS  
1 MillionYears

NEANDERTHAL MAN  
500 000 Years

MODERN MAN

[http://orig07.deviantart.net/b0f5/ff/2015/198/6/c/evolutionrobotsquid1\\_by\\_djimme-d91naci.jpg](http://orig07.deviantart.net/b0f5/ff/2015/198/6/c/evolutionrobotsquid1_by_djimme-d91naci.jpg)

**Organisational  
Training – Structured  
Programmatic**

Training & Certification

E-learning delivery

Blended Learning

Informal & 70:20:10  
Learning

Talent Development

Social & Mobile  
Learning – User  
Generated Content

Learning Analytics

Learning Engagement  
& Gamification

Learning Relationship  
/ Personal  
Transformation

**Individual Learning  
Personalised - Iterative  
Bite-sized - Nudged**

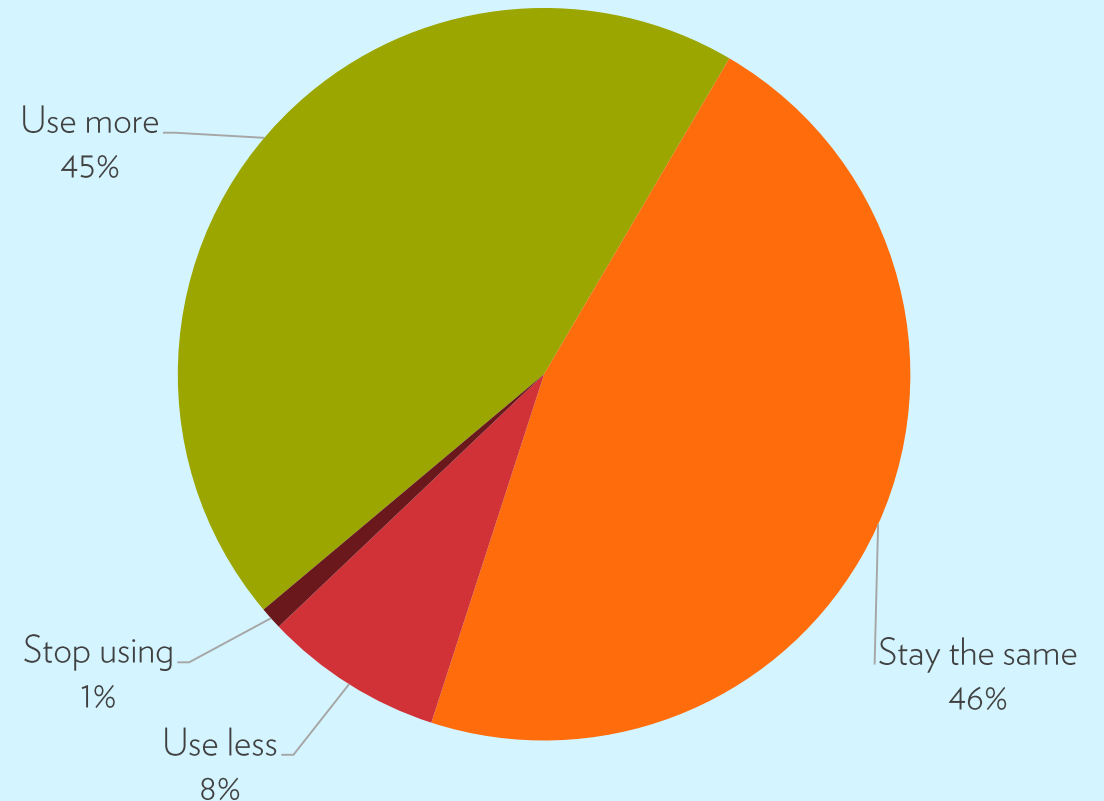




# The tide is turning!

- PROACTIVE demand for LMS is at it's lowest in 4 years
- only 45% are expecting to increase their use of LMS
- 9% expect to reduce or stop using their LMS - up 5% on 2017

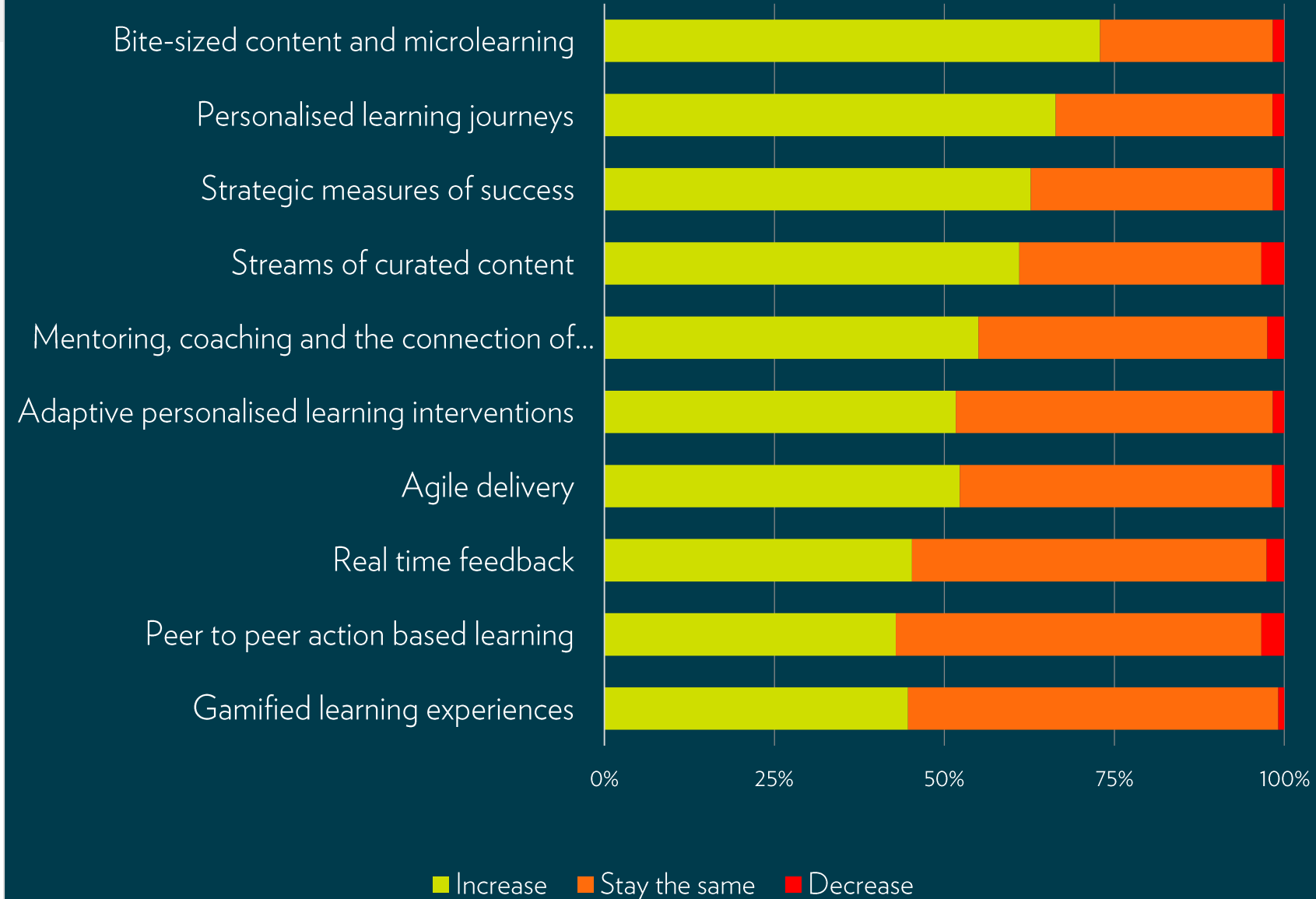
How do you expect your demand for digital learning platforms to change in the future?  
**Learning Management Systems**



Things are shifting in the right direction with an increased focus on Bite-sized learning and personalisation

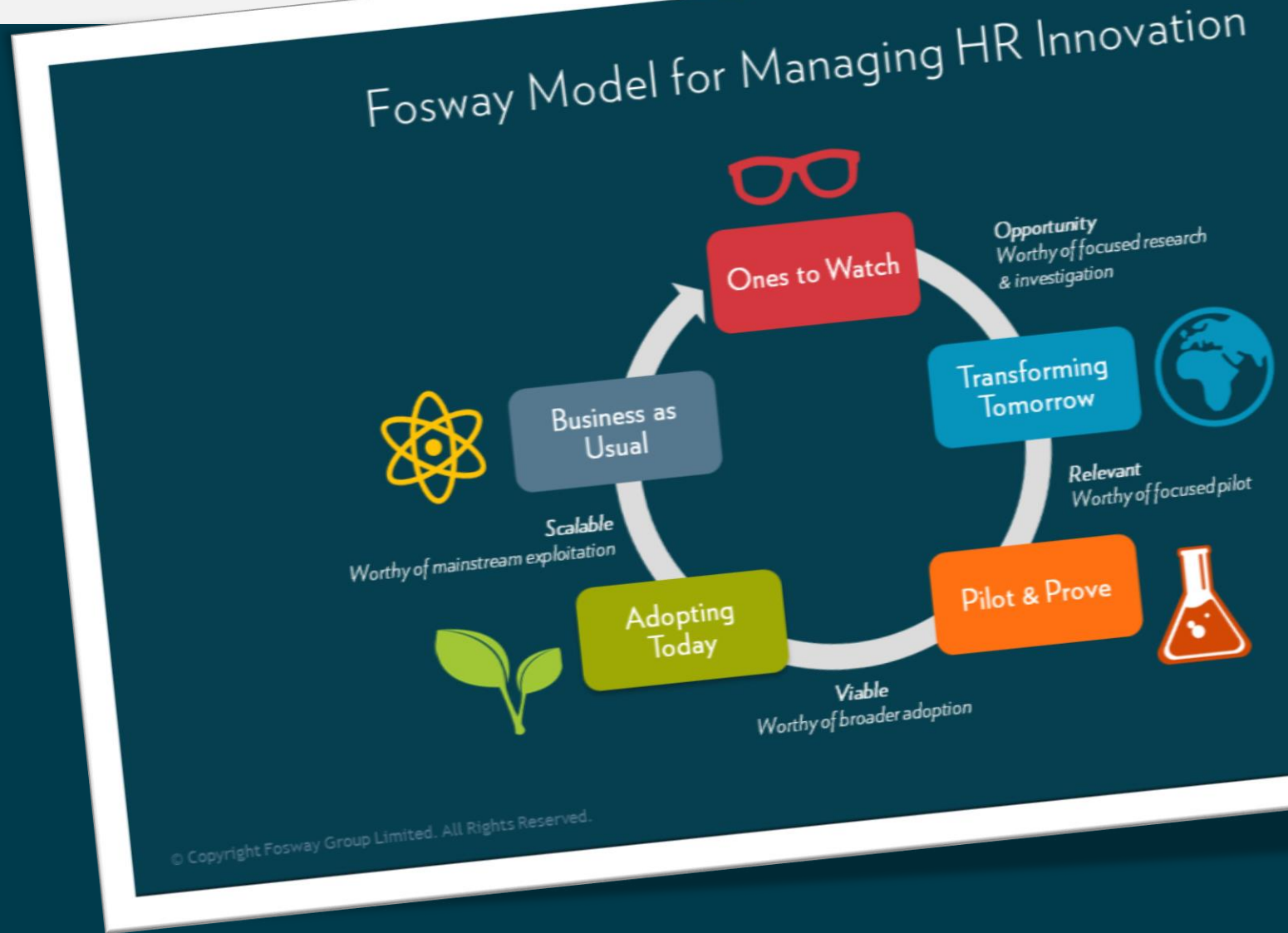
But microlearning is unlikely to be your saviour on it's own – without AGILE LEARNING thinking and LEARNING CYCLE thinking... it's just another content issue = not a learning for performance agenda...

## approaches likely to change over the year ahead?

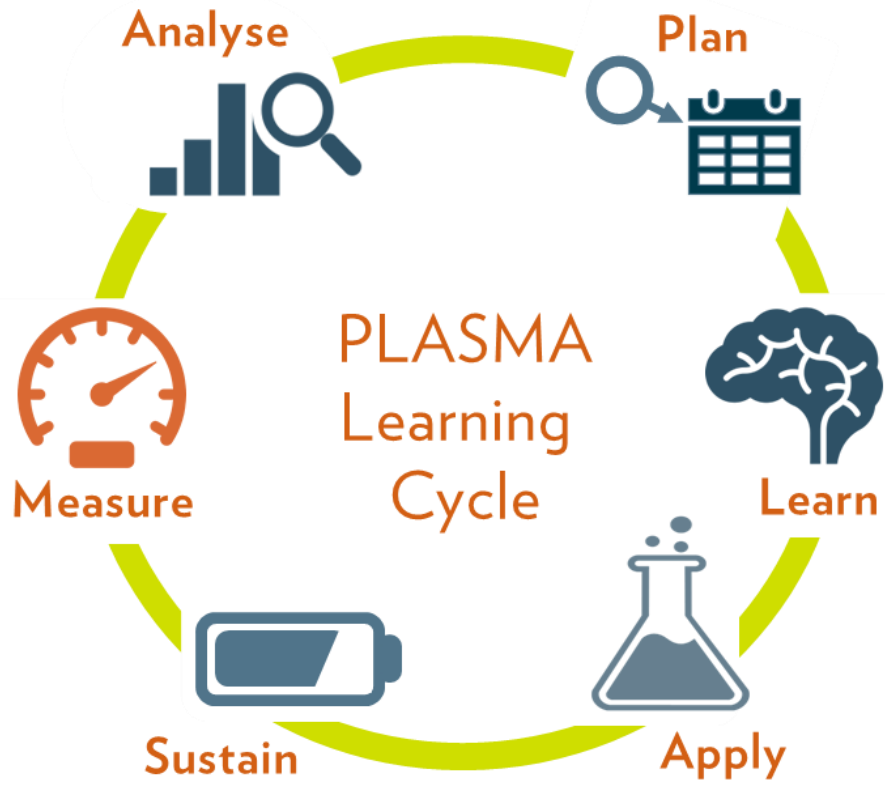


The most Hyped solutions -AR and VR are your biggest risk...

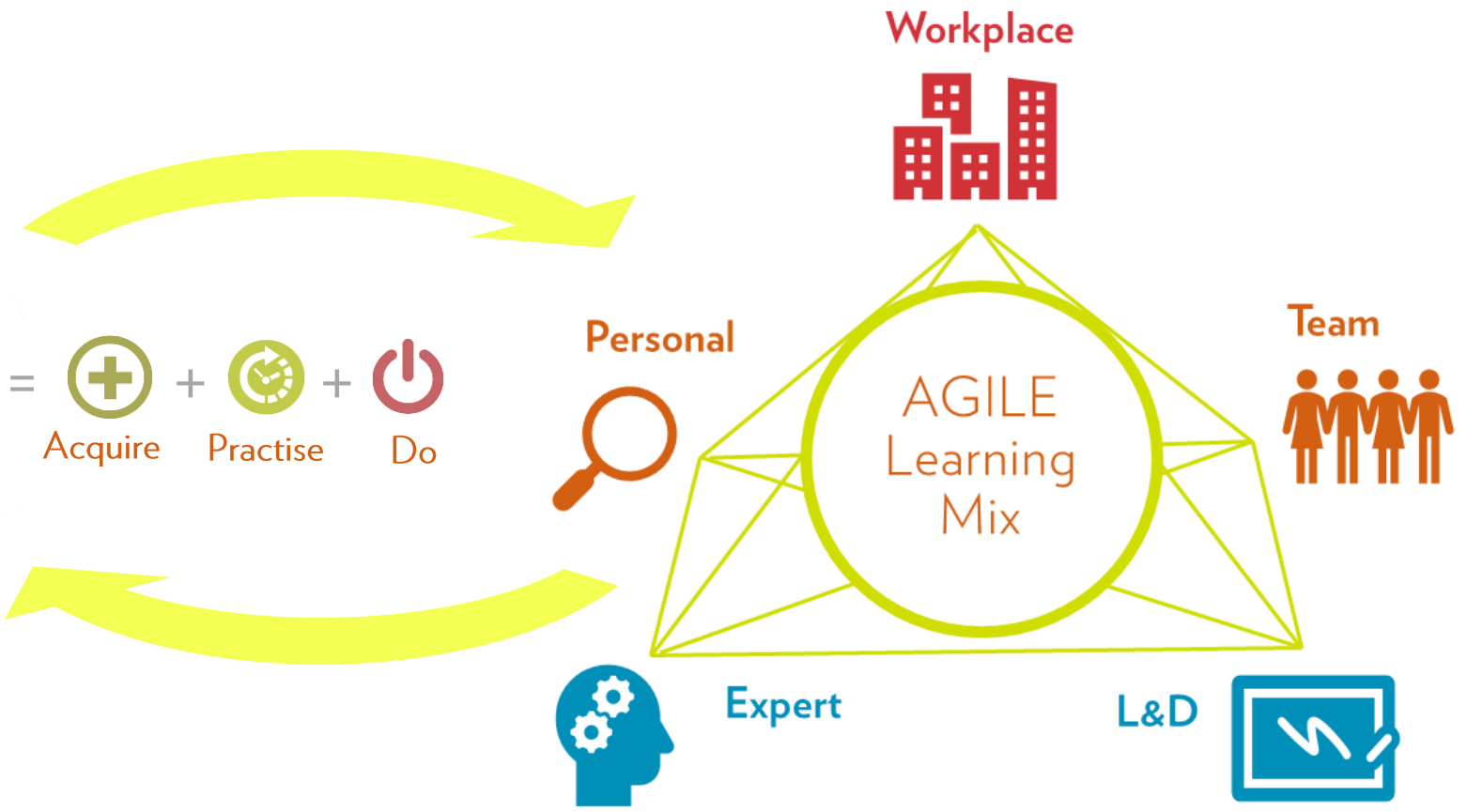
manage innovation in these areas carefully!



# Learning Cycles, AGILE Learning & AI



= + + = Acquire + Practise + Do



What's exciting is where the AI can support learners' in energising & nudging their development!

Not 70:20:10 - but the right mix depending on your budget, quality and time constraints

# Significant pressure for Vendors to respond to more diverse / next gen requirements

... e.g. the factors in Fosway's Learning Systems analysis

▶ **Learning Enablement**  
- **107 factors**

- Assessment & Evaluation
- Formal Learning
- Workplace Learning
- Collaborative & Social Learning
- Competencies & Capabilities
- Development Planning
- Extended Enterprise
- Learning Content & Asset Management

▶ **User Experience**  
- **69 factors**

- Experience Administration
- Learner Portal
- Learner Relationship Tools
- Manager Portal
- Mobile Learning
- Analytics, Dashboards and Reporting

▶ **People, Finance & Systems Mgmt**  
- **46 factors**

- Organisation & People Management
- Finance, Budget & Ecommerce Management
- Integrations (standard out of the box connectors)

# Fosway 9-Grid™ Reports

2018 Launched

- Learning Systems
- Digital Learning

plus 2017 reports....

- Authoring Systems
- Talent Management
- Cloud HCM

<http://www.fosway.com/9-grid>



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**The idea that digital learning is disconnected from HR is a myth. In reality, only 55% operate independently from HR and Talent.**

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