

The impact and experience of using **digital** in learning

2019 survey findings, from HR and L&D decision makers



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Introduction

Digital is impacting our lives in so many areas, we often hardly notice it any more. From dining, to driving, to dating, digital has crept in so swiftly that it has become second nature to many of us. And it doesn't stop there. Not content with disrupting our personal lives, digital has also had an impact on professional environments, blurring the lines between 'work' and 'home'.

The impact of technology is not a new phenomenon; it's something that has in fact been happening for decades, but the speed of change in the digital space is constantly progressing. New technology has little time to establish itself, before the 'next big thing' comes along in its place, presenting both opportunities and challenges for organisational learning.

At both Hemsley Fraser and 5App, we have experienced first-hand the huge shift in the way companies use, access and introduce learning across their organisations. Over the past three years we have worked with more than 250 clients to help them embrace a blended, learner-first solution which aligns with overall business objectives. We know what success looks like for them, but how does this compare to the wider industry experience?

We set out to answer the above with our Digital Impact Survey, in which we asked

474 HR and L&D professionals about their approach to and experience of digital learning.

Our research demonstrated that digital is a top priority at present for HR and L&D professionals and will continue to grow at pace, with 41.35 per cent intending to introduce significantly more digital learning into their businesses in the next 12 months. But with some technologies already established and others still finding their feet, which aspects are organisations excited about – and which have failed to have an impact?

We have conducted this research in order to find the answers to these questions. We hope this report will help organisations to benchmark their use of digital in learning with peers and provide some useful insight into how to achieve the greatest impact.



Our evolution as an organisation to get the best out of digital in learning has mirrored that of our clients, pushing what is possible with technology without losing the value of blending classroom, virtual, micro learning and in-depth resources across the business. We see ourselves as partners in this journey, not just learning experts.

Lynsey Whitmarsh - HF Director of Innovation.

// There are new functionality and ideas we have [for our learning hub] all the time – because technology is evolving. So continuing to be at the forefront is important to us. //

Tara Hutton - Head of Talent and Development, Zurich Insurance

Which approach wins today?

In order to understand where digital learning is heading, we must first define the current state of play. The most popular approaches for digital learning today, according to our survey, are the intranet and blended learning.

One respondent states: "We use the intranet for knowledge sharing. Anything that encourages knowledge sharing (blogs, articles etc) helps our staff."

The intranet is not typically considered to be an L&D tool, but its popularity does point to another big trend we have experienced in digital learning – learning within the flow of the business. Increasingly, end users are requesting learning aspects which are integrated into their usual work life. Engagement improves when the learner can easily access the content they need without having to go outside of their typical experience.

Employees are accustomed to using intranets, which are visible and accessible to them. As communication platforms, they are somewhat effective at signposting employees to learning resources. What this reports indicates is that users are turning towards using intranets because they have expectations which go beyond the traditional LMS. Learners are looking for a balance of platform functionality and content, which requires a mixture of intranet, LMS and communication platform. This signals a desire for a more holistic approach.

As digital becomes ever more prolific in the learning space, it is perhaps a surprise that the second most popular form of delivery is a blended approach, which

includes face-to-face learning. For many respondents, blended learning is seen as having the biggest impact when aiming to retain and embed learning.

One respondent comments, "I think blended learning has the ability to develop the learning experience either by preparing participants before the face-to-face learning so you can go more in depth in the session or cementing learning with follow up information post session."

Another says, "We find that our personnel are more likely to retain knowledge by using the combination of engaging in conversation along with digital training modules."

This signals another shift in digital learning, towards a more balanced and holistic approach. Providers and professionals are moving away from a 'one size fits all' method for L&D and are instead focusing on multiple forms of delivery to ensure greater levels of learning and engagement.

An interesting point revealed by the survey was the lack of enthusiasm for mobile apps. The ubiquity of apps in the consumer world has not been mirrored within the learning space, despite the blurring of lines between work and personal lives. Have mobile apps in learning not taken off because learners dislike them, or is it that L&D providers have not yet found a way to effectively incorporate a mobile app into a blended and holistic approach?

Intranet
17.89%

Blended Learning
17.75%

Free Online
14.74%

Content Library
14.26%

LMS
13.63%

// Users are turning towards using intranets because they have expectations which go beyond the traditional LMS. //

Key challenges?

80 per cent of L&D and HR professionals said that learning technology is a challenge. What's most interesting here is that there isn't one common factor preventing digital adoption, but several. Perhaps predictably, the number one cited reason is budget, at 24.9 per cent, with existing systems settling in second place with 15 per cent. Could it be that organisations are facing a combination of challenges, which coalesce to form a perceived unscalable problem?

It certainly seems possible that organisations are thinking about 'digital transformation' rather than 'digital adoption' which can make them slower to introduce and adapt to new technologies. When looking at the reasons tech has failed, respondents stated a lack of digital culture, lack of usability and a low level of digitally skilled employees.

The connecting factor here is that these are primarily people problems, rather than problems with the technology. In fact, all of these concerns can be overcome, if the right technology is deployed in the right way.

Successful implementation of learning technologies is not solely about the technology itself; the environment and culture into which it is introduced and the support it receives from managers and senior executives are key too.

Further barriers to the faster adoption of digital technologies are the mindset of leaders, company culture and employees' mindset – again, these are people problems. L&D and HR professionals must focus their attention here in order for digital learning to be a success.

Learning technology
is a challenge for
80%
of L&D and HR teams

“All of these concerns can be overcome if the right technology is deployed in the right way.”



Budget



Time



Company
culture



Legacy
systems



Mindset

Robots are not taking over the world (yet)

The hype surrounding certain technologies in the digital learning landscape appears to be just that – hype. Although there is a growing interest in these technologies, including chatbots and artificial intelligence, our research shows that we are not quite there yet, in terms of making it into mainstream usage and adoption.

According to respondents, the number one factor that will accelerate digital learning in organisations in the next two to three years is a better blended experience on and offline (20.00 per cent), followed by self-led learning (19.74 per cent) and better digital user experience (18.55 per cent).

The trend towards self-led learning poses a new challenge for organisations – how to ensure learners receive the correct, curated content from the chosen delivery channels (that support the business goals as well as learner appetite). There is a risk that if given too much power over their own learning, users will opt to use the methods most familiar to them, meaning they will consume different (and potentially poor quality) content from different sources at different rates. Choosing technologies which are accessible and engaging, then embracing and encouraging the use of those technologies will become even more vital.

As one respondent says, “We are in need of building a more innovative and curious mindset and interested in how to use current technology to drive new behaviour.”

Newer trends in digital learning are becoming more commonplace for L&D and HR teams, with micro learning (12.24 per cent), chatbots and machine learning (8.82 per cent) and AI recommendation (7.5 per cent) all forming a part of the future digital learning offering.

Interestingly, when asked which learning technology excited respondents most at present, the most common answer was virtual reality, but the technology was also named by some HR and L&D professionals as something they would like to be consigned to the dustbin of history. This suggests that technology must be implemented carefully and be relevant to the content it seeks to deliver, or risk being written off as a fad.

Next 2-3 years...

Blended experience **20%**

Self-led **19.74%**

Digital experience **18.55%**

Newer trends...

Micro learning **12.24%**

Chatbots/machine **8.82%**

AI learning **7.50%**

Aligning business and learning priorities

Buying technology for technology's sake is easily done; the promise of new technology can be hugely seductive. But as this research has demonstrated, many technologies have failed to deliver and one key reason for this is the misalignment of business and learning priorities. Organisations have a tendency to think of L&D as its own separate entity, but by taking a holistic approach and considering learning's place within the wider business strategy, learning technology can help to achieve business goals.

The spread of answers in our research indicates that HR and L&D professionals have different understandings of what should be included within learning. Communication, knowledge sharing and soft skills are part-and-parcel of L&D and this again requires organisations to think more broadly when it comes to learning.

In aligning digital learning strategies to business outcomes, organisations are able to analyse how well a piece of technology

is working and where there are gaps. The data captured by learning technologies has huge potential for businesses who know how to use it, and use it well.

The good news is that 38.97 percent of respondents say their learning solutions are somewhat aligned with business outcomes, with a further 31.72 per cent reporting a close alignment. Digital learning is also having an impact on performance and productivity, according to 19.55 per cent of respondents. About 40 per cent say it is helping improve communication and employee engagement. Clearly there are additional benefits to digital learning, which lay outside of the traditional L&D remit.

71%
Say their digital
solutions are
aligned

40+%
Say it's having an
effect on comms
and engagement



Measuring impact

As with any investment, the impact of digital learning technologies must be measured. Our research indicated that organisations are using several different methods to measure impact, with the primary focus on employee engagement (23.88 per cent). This is followed by qualitative feedback and outcomes related to specific business impact (18.69 per cent). Only 8.65 per cent are measuring productivity and 9.69 per cent don't measure any impact on the business. It's interesting to see that return of efficiency – time given back to the business – is the primary measure for 11.07 per cent of organisations.

This indicates that perhaps organisations are unsure how best to measure the impact of digital, with not one obvious answer. As the experts in what works in learning, L&D providers must lead the way when it comes to setting the standard for important measurables. Digital can provide the tools for organisations to assess impact, but L&D providers must work with organisations to ensure these tools are in place and easy to understand.

The research suggests that learning providers must develop technology which allows organisations to measure key metrics to discern the impact of digital and must communicate this to businesses. Many of the doubts preventing or slowing down digital adoption can be assuaged with defined and measurable outcomes. The data collected in digital learning can be invaluable to organisations, something which demonstrates a key advantage over pure face to face learning. L&D providers and organisations must work together to release the potential of that data.

24%
Employee
engagement

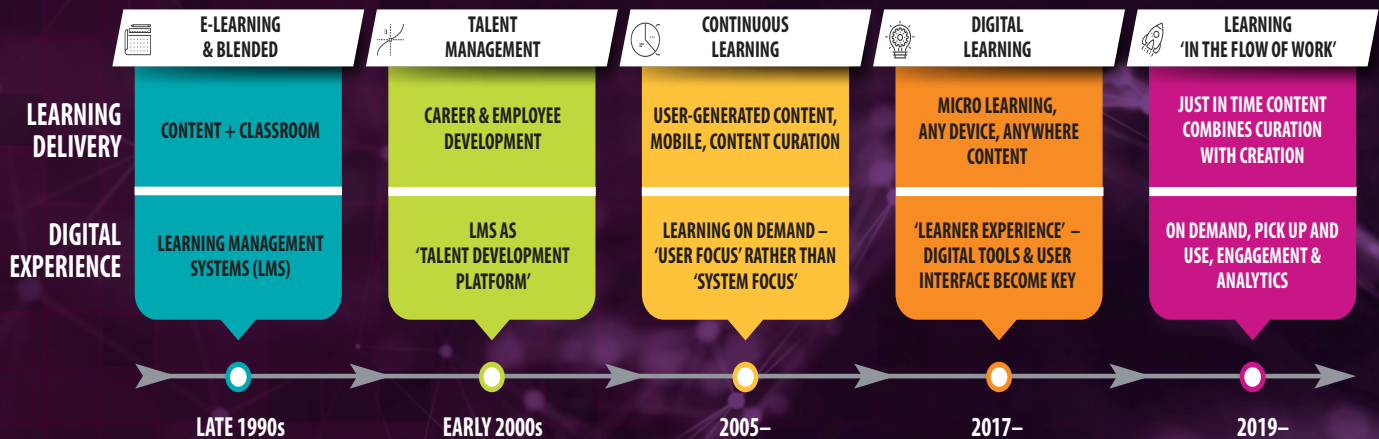
18%
Say it's helped
develop new
skills



The 'Digital in Learning' Journey (so far)*

There have been a massive shift in learning towards digital tools in the last two decades – the LMS market is now worth over \$5 billion – coming from a very functional purpose of replacing traditional learning content with digital content, to now embracing the 'digital natives' on their own terms. This does not mean other forms of learning are irrelevant, in fact our survey suggests the biggest impact can be achieved by combining a blend of digital and classroom learning, but it does mean that a range of more flexible and engaging digital solutions are now coming to the fore.

**Based on Josh Bersin
Analysis of L&D Tech trends.*



On the way out... ?

There's a wide range of technologies that L&D and HR professionals would like to consign to the bin. The graphic gives a flavour of the most popular. A recurring theme is poor user experience, PowerPoint slides and poor e-learning. However, many respondents flagged up the fact that they would not yet consign anything to the bin because they are really just starting out on their digital learning journey.

That's a good reminder that the context of every organisation is different, meaning that the tools used and the way digital learning is deployed will be different. Understanding such differences is key to having a clear picture of what works and why.

It also poses a challenge for HR and L&D professionals who want to implement new

learning technologies but require buy-in both from senior management and end users. They must demonstrate that a poor experience with one technology, does not guarantee the same result with another form of digital learning, or a more considered and well thought out application.



Conclusion

What makes digital effective in learning

There are some common threads running through this research and these are worth reflecting on when planning on investing in digital learning, which 41.35 per cent of respondents intend to do (significantly) in the coming year.

The priority should be to ensure that learning goals are properly aligned with wider business outcomes. A holistic approach means that learning outcomes are much more likely to be achieved and that the impact of digital learning can be felt in other areas of the business. Not only that, but learning must be entwined with the flow of the business, so that users do not need to go outside of their usual working lives in order to learn.

When it comes to the best method of delivery, the research points towards blended learning; it also suggests that blended learning is a wider concept than HR and L&D professionals have previously been accustomed to. This still means investing in digital learning that integrates with face-to-face interventions but, more broadly, blended learning must also include tools which support the individual in both professional and organisational development.

In order to achieve this, organisations and L&D providers must create an ecosystem of different learning opportunities, which includes digital, platform and self-service and face-to-face learning. Increasingly, users expect learning to include traditional learning and soft skills alongside life and

technical skills. A blended approach must include communication tools, campaigns, key information and documentation in order to meet the needs of learners.

A blended approach can also help organisations to overcome some of the problems preventing the fast adoption of digital learning, as new methods can be introduced over time. This is a huge advantage for organisations who are concerned about budget, legacy systems and senior buy-in.

Human factors such as culture, executive buy-in and manager support are all critical for digital learning to succeed. The technology alone will not deliver the required impact. HR and L&D have to work with colleagues to create the right environment in which digital can flourish.

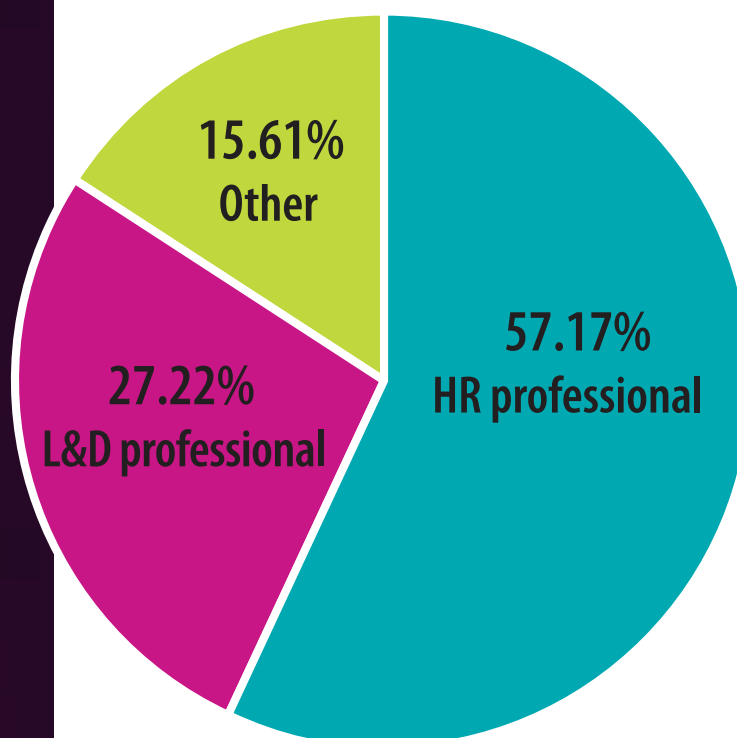
Finally, when it comes to the future, the research highlights the importance of user experience and the need for technology to enhance accessibility and engagement. That means providing a digital learning experience that is straightforward and fits easily into the parameters of the learners typical working day. Organisations must also consider investing in employees' digital skills, ensuring that no learner is left behind by new technologies. Developing a digital culture involves more than buying learning technologies; organisations must focus on employees so that they can benefit from the range of new tools that are now available to them.

“All of these concerns can be overcome if the right technology is deployed in the right way.”

The findings in detail

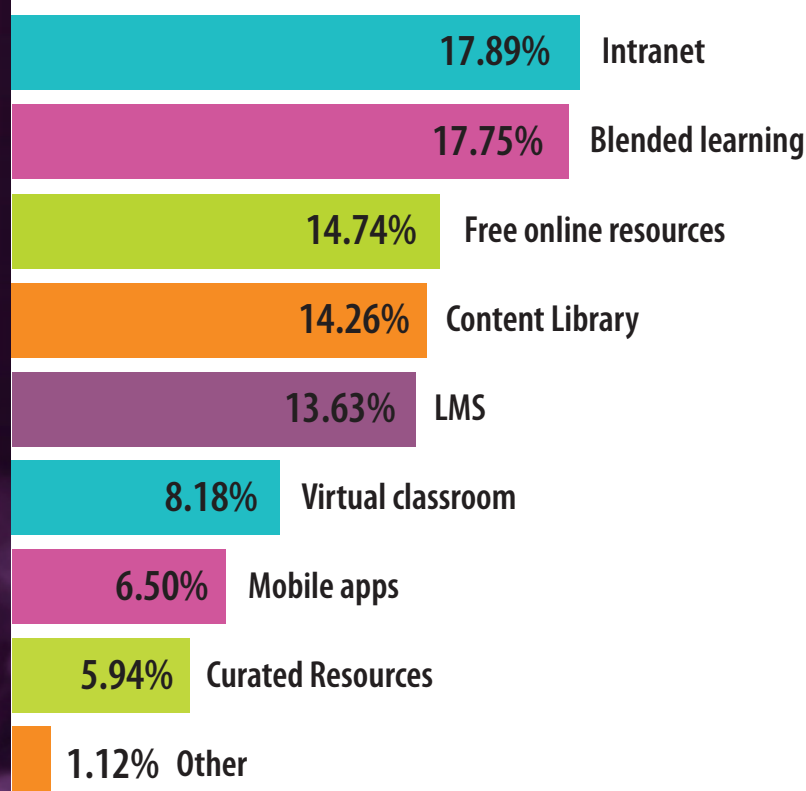
1. Which of these **best describes** your role?

474 UK respondents completed our survey, from across different sectors, and were from predominately HR and Learning and Development roles. The 'other' category was made up of roles including: Talent, engagement, reward, resourcing, payroll, recruitment, OD, employer brand, diversity and inclusion, transformation and marketing/communications/digital/business development.



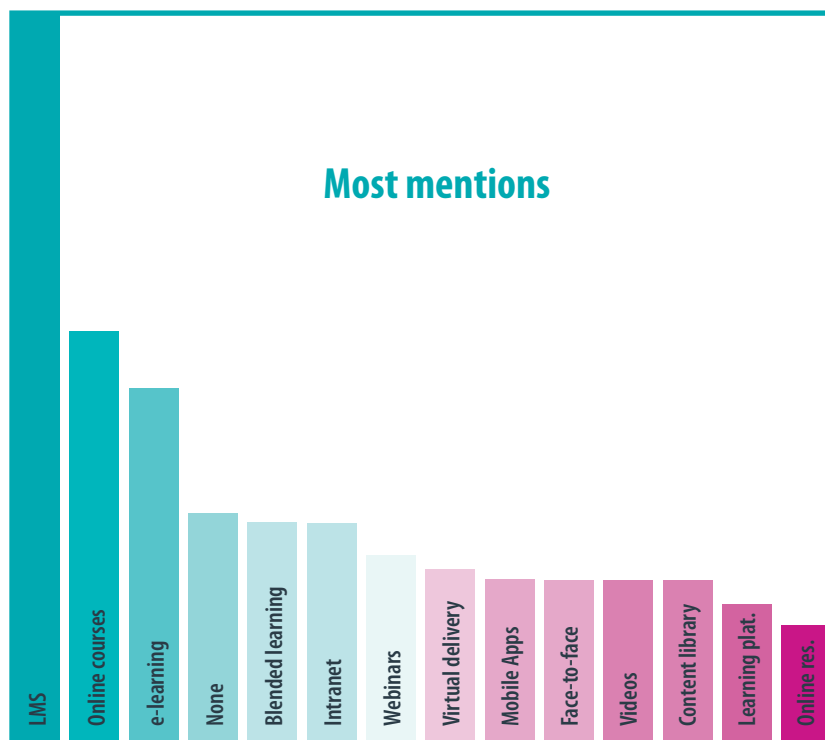
2. What does **digital** in learning look like in your organisation? **Which of these technologies** do you currently use?

Intranet and blended learning are the most popular, followed by free online resources and content libraries. Behind that comes the LMS. These are the key ingredients for digital learning right now. This suggests businesses are using a range of approaches and channels to reach their employees and have moved beyond conceiving digital learning as the LMS.



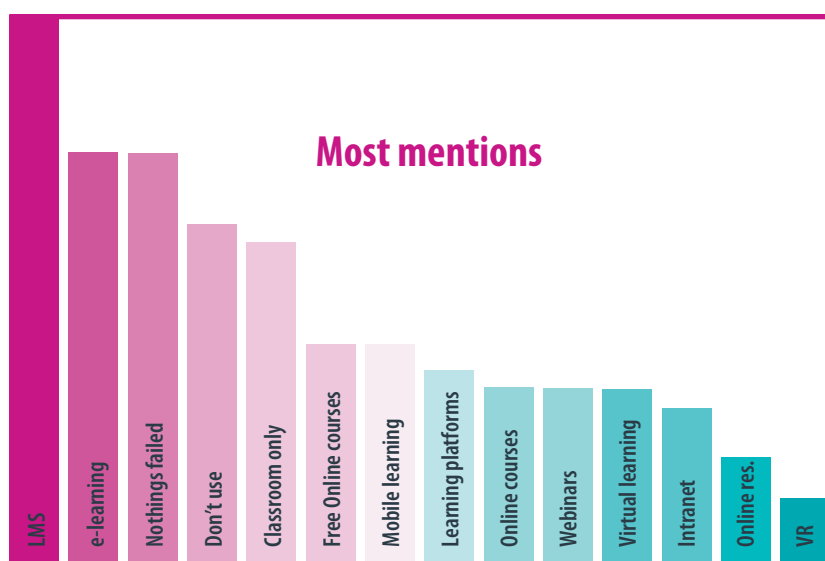
3. Which learning technology has had the **biggest positive** impact on your organisation and **why?**

So when asked the question 'which learning technology has had the most positive impact on your organisation' respondents highlighted many things, but from the wide variety of comments the ones that were mentioned most included: LMS, online courses, e-learning, none, blended learning and intranet.



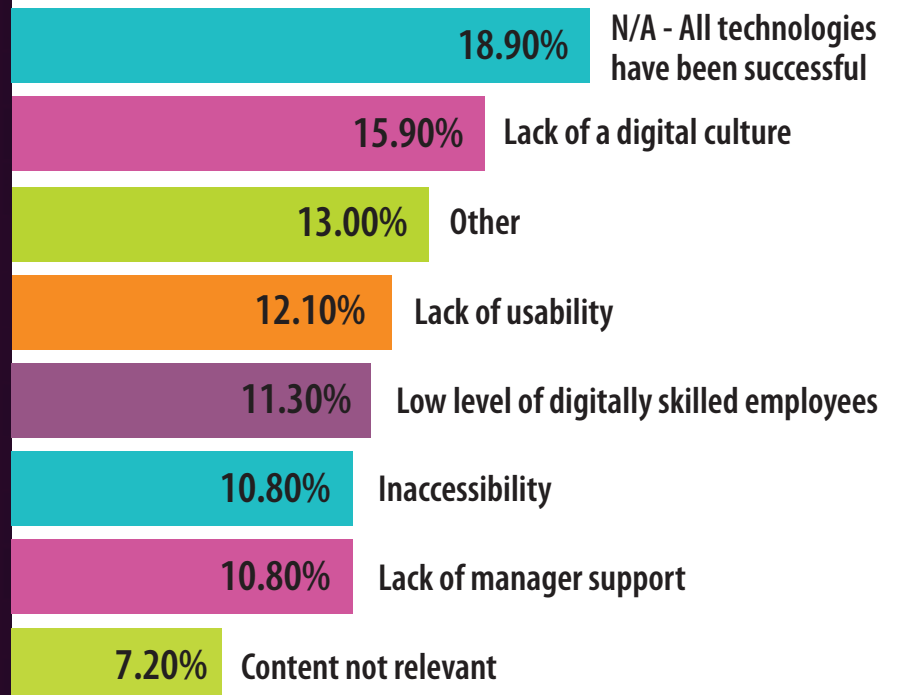
4. Which learning technology has **failed** to have the desired impact on your organisation?

OK, so we've only included items here that had more than one reference made to them (and statistically the volumes are lower) and there is quite a wide mix, but what we see are that the three most cited learning tech that has failed to deliver are: the LMS, e-learning and the third statement are that nothing has failed (in those organisations commenting). Interesting to see the LMS appear in Q3 (+) and here (-).



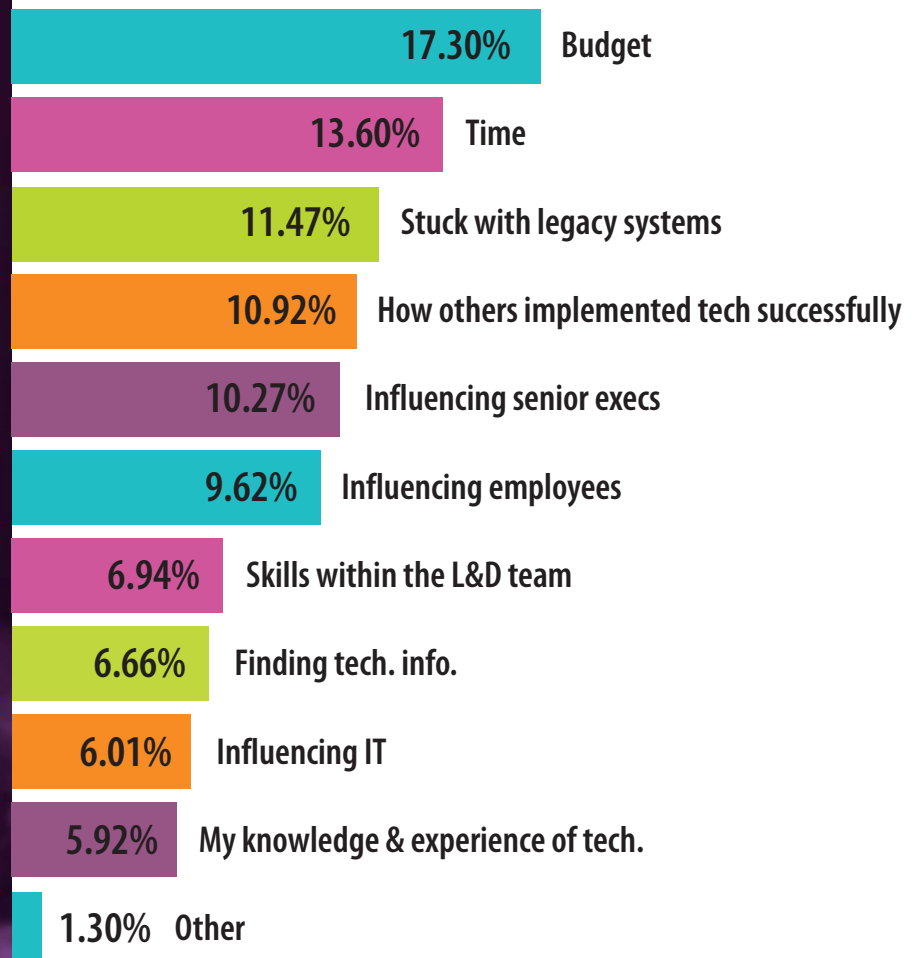
5. Why technology has failed?

The biggest reasons digital learning technologies have failed to have an impact is lack of digital culture within the organisation and lack of usability. The low levels of digital skills are also an issue, as are lack of manager support and inaccessibility.



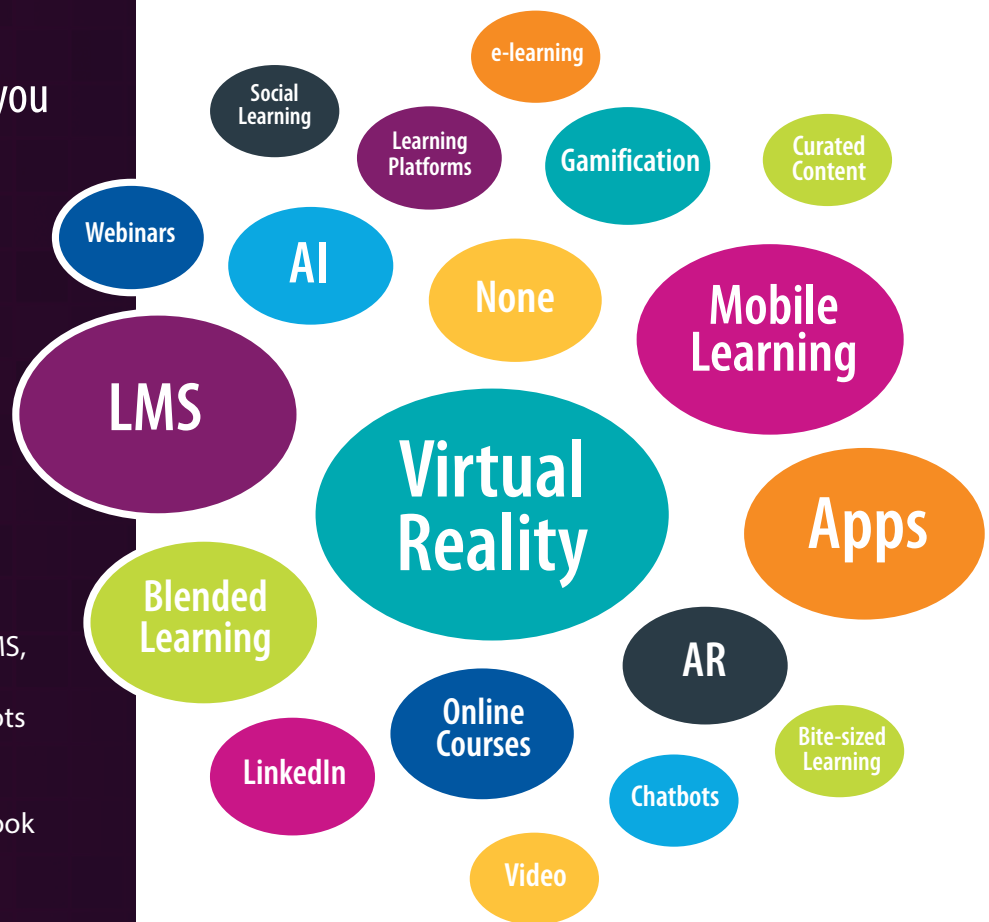
6. What are your challenges around understanding and implementing learning technologies?

The biggest challenges highlighted are budget, followed by time and legacy systems too. Then there are the challenges of influencing senior executives and employees, as well as finding informed information about technologies and accessing good examples of how other organisations have implemented technology.



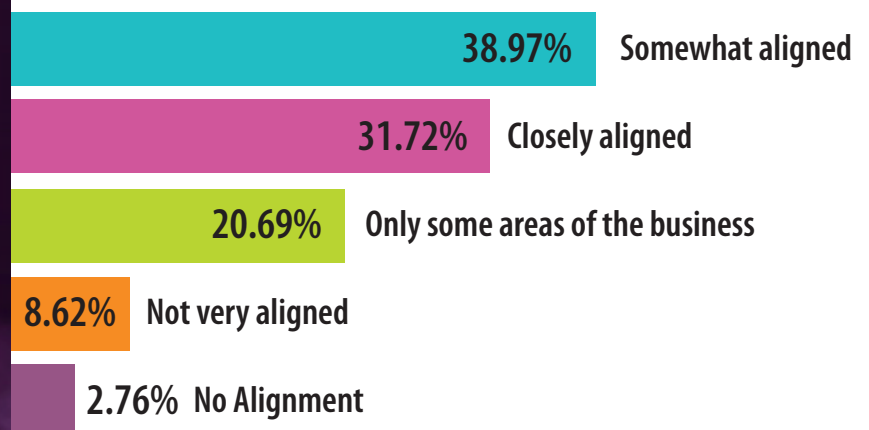
7. Which learning technology **excites** you most **right now**, and why?

Again, we've only included items here that had more than one reference made to them (and statistically the volumes are again lower) – again we see a really wide spread of things mentioned. The items most cited as learning tech that excites right now are: VR, LMS, mobile learning, Apps and blended learning. AI, chatbots and machine learning are quite a bit further down the list (at this point – will this look different in a year?).



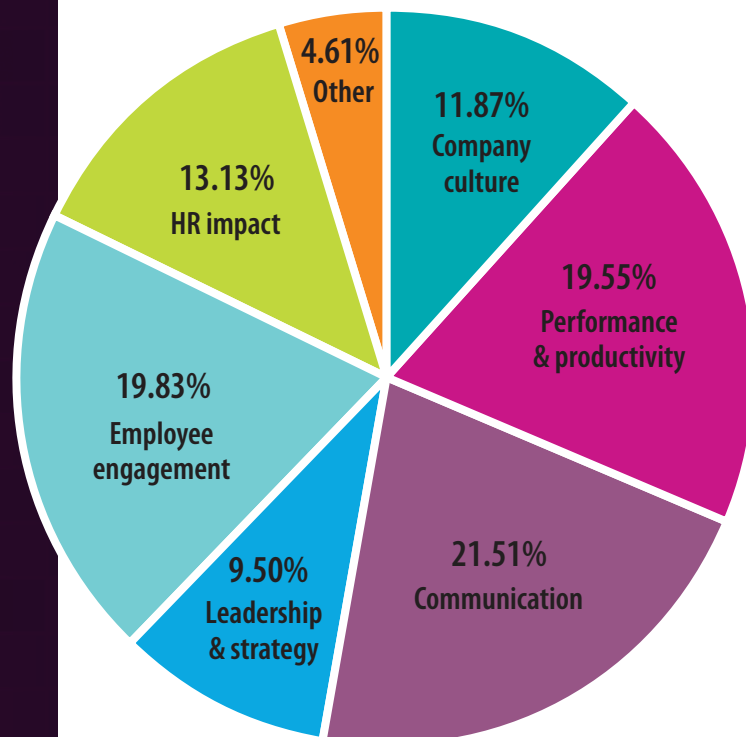
8. How **aligned** are your organisation's learning solutions to business outcomes?

The good news is that the responders to this question are seeing generally positive levels of alignment between their learning solutions and the business outcomes.



9. So far... using digital has **helped** improve...

So where is digital having a positive impact in the organisation? Mostly on communication, employee engagement and performance and productivity. Which is very positive news. This might suggest that if done well, digital learning can be effectively woven into the flow of the business and be used intentionally beyond the core learning, to encompass a remit of raising engagement and performance more generally.



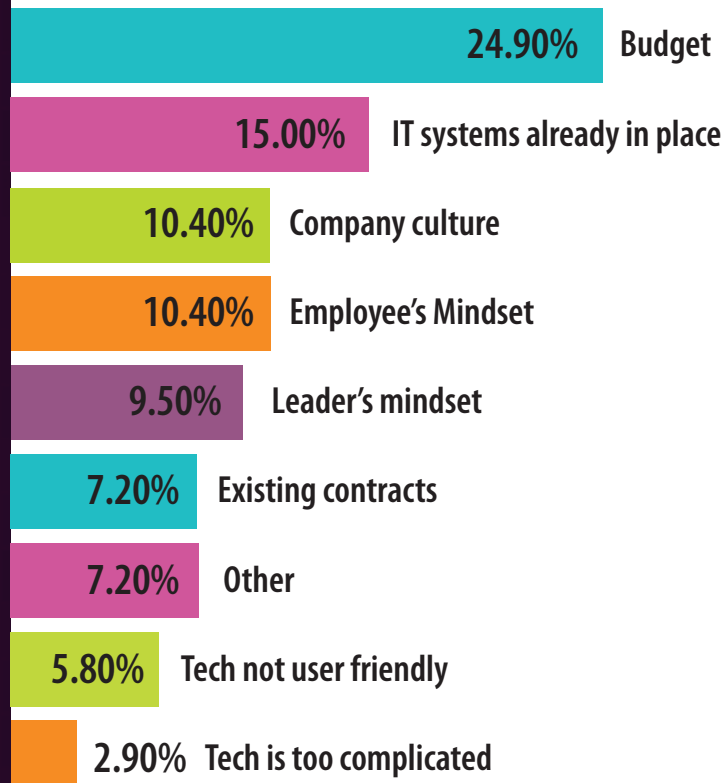
10. Your **primary** measure of effectiveness is...

The top three measures of effectiveness are employee engagement, qualitative feedback and outcomes related to a specific business impact. As training has historically been measured by qualitative feedback, it's great to see this move to include engagement and business impact more significantly.



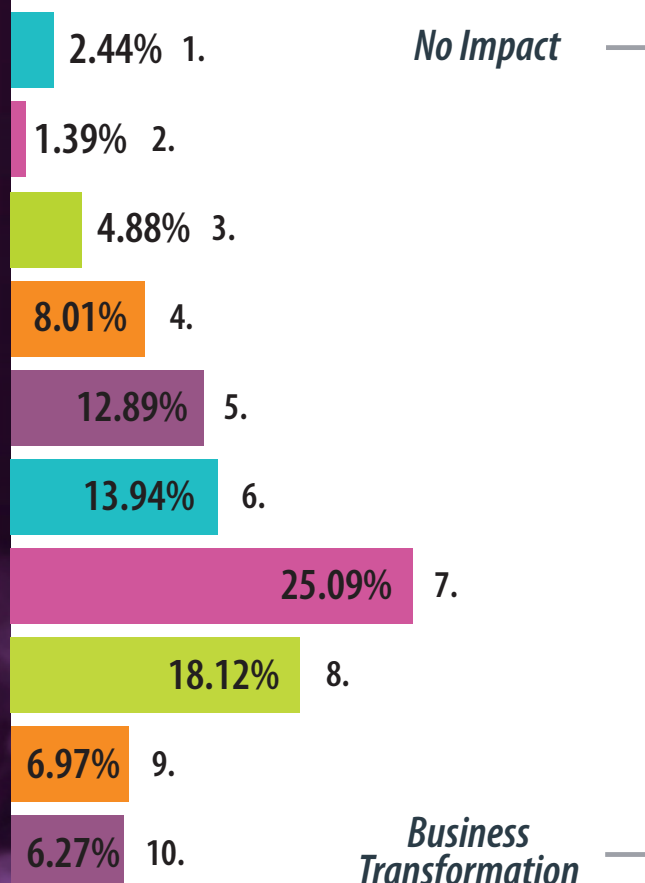
11. What's **stopping** your organisation from adopting digital faster?

Barriers to adopting digital learning faster such as budget (which comes out as the biggest issue by far) and legacy systems are not a surprise. What is interesting is that the mindset of employees and managers are a problem, as are cultural considerations.



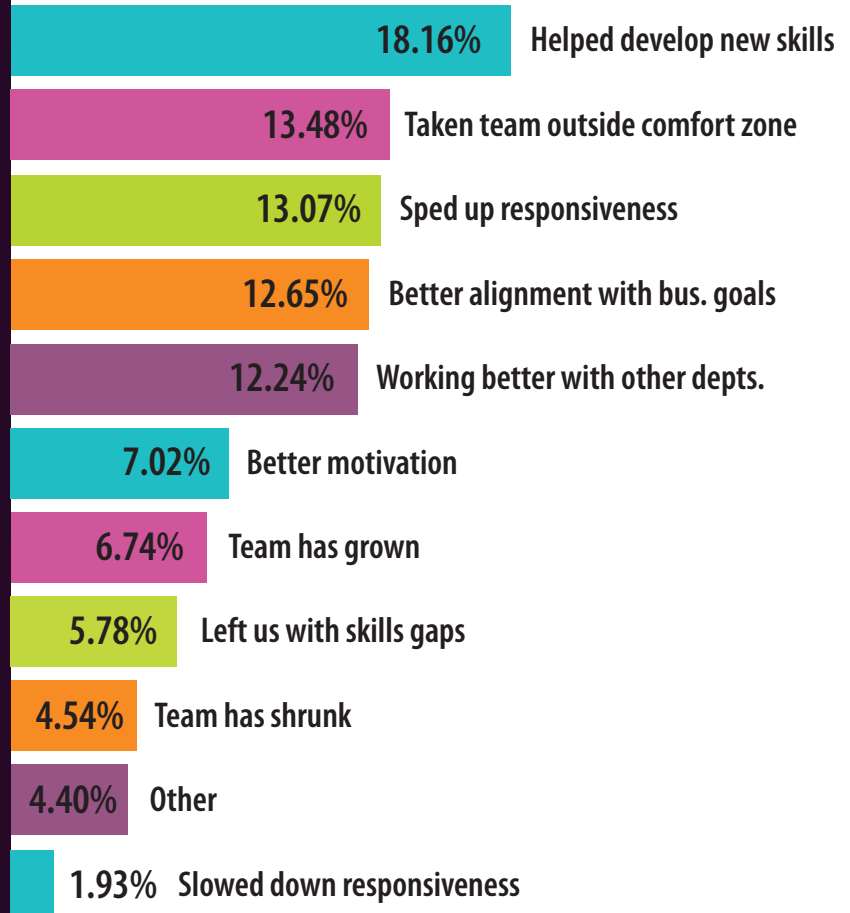
12. Please rate the **business impact** of digital versus traditional forms of learning

The responses to this rating suggests that digital is having a more positive impact than just traditional forms of learning – in fact, more than twice as many respondents thought digital learning has a higher business impact than traditional forms of learning.



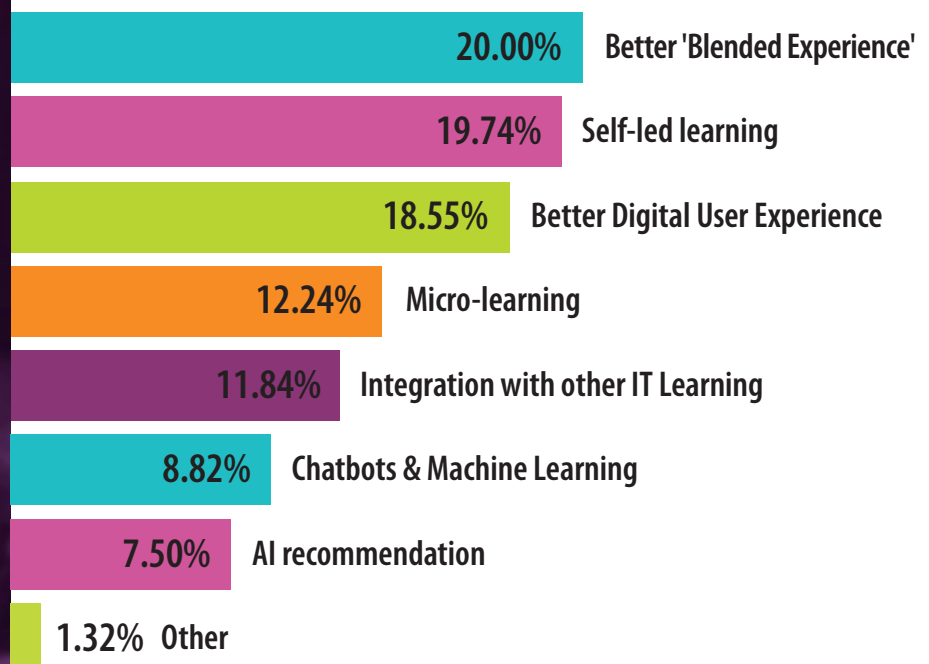
13. What **effect** has digital in learning had on the L&D team?

Generally there have been some positive impacts on L&D teams, from helping develop new skills, stretching them out of their comfort zones, to helping the team become more responsive, better at working with other departments and aligned to business goals.



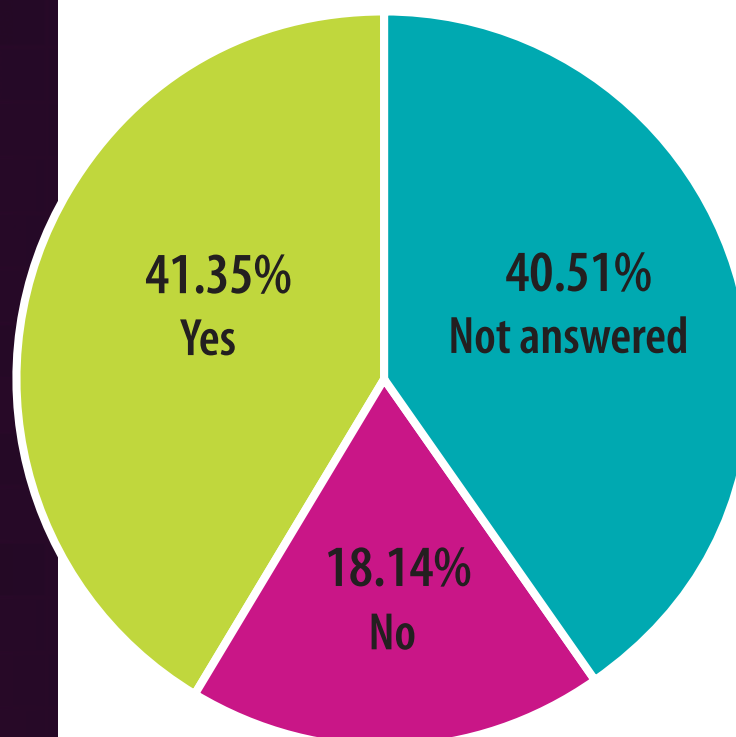
14. Thinking about the next 2-3 years, what do you think will **accelerate digital** in learning in your organisation?

The three top factors cited that are going to accelerate digital learning in the next three years are not new technologies as such, but rather better blended learning experiences, self-led learning and better digital user experience.



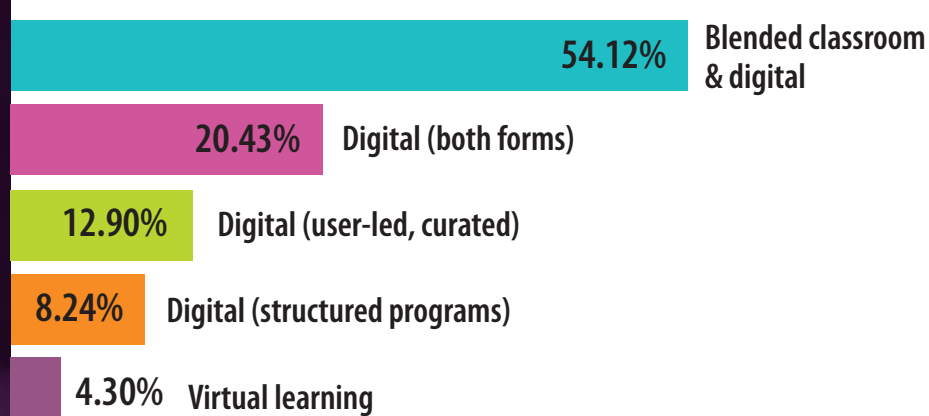
15. Do you **intend** to introduce significantly more digital learning into the business in the next **12 months**?

Whilst there was a sizeable number of responders that did not answer this questions one way or the other (maybe suggesting that they were not sure, we didn't give that option – oops!), for those that did more than twice as many answered 'yes', they do intend to introduce more digital learning into the business in the next 12 months.



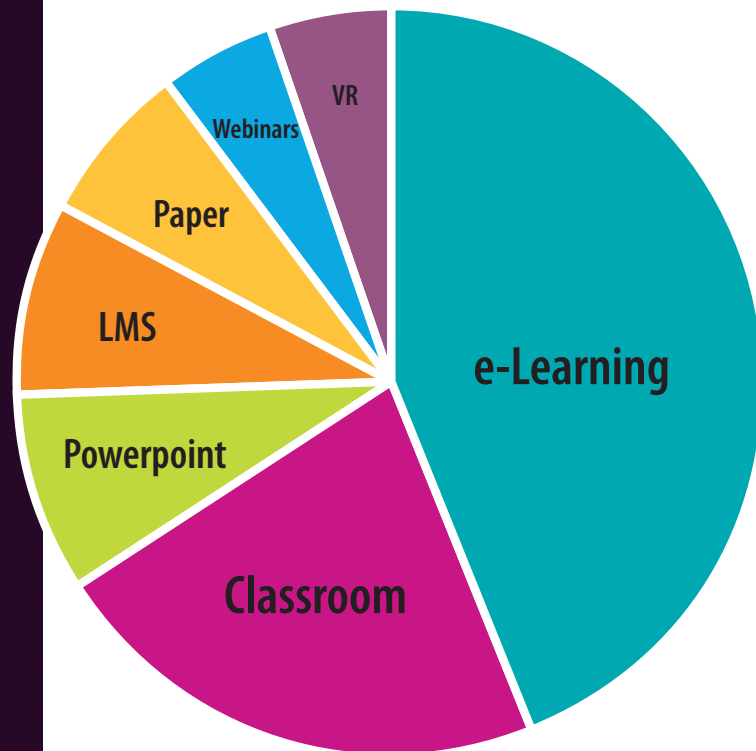
16. What's your **ideal** blend of learning solutions for the **greatest** business impact?

According to those that answered this question, providing blended learning experiences are, by a country mile, the ideal way of driving the greatest business impact. Mixing up structured and user-led digital learning opportunities is the next highest to feature.



17. Finally, if you could consign one current learning technology to the **dustbin** of history, what would it be?

We had fun reading these. OK, so we've only included items here that had more than one or two references made to them (and statistically the volumes are low), but what we find isn't too surprising... By far the most popular mentioned for what to the dustbin of history is e-learning. Followed by traditional classroom training, PowerPoint, the LMS, paper-based activities and then (actually somewhat surprisingly) webinars and VR.



About Hemsley Fraser

Hemsley Fraser create, deliver and execute learning experiences to drive higher levels of engagement. From our roots as a UK training company, we've empowered talent for three decades, evolving our business into a global, award-winning provider. Experts in our field, today we're transforming how businesses learn and engage. Our content is at the heart of how we do this – expertly created, easy to consume, and visually engaging – it can be experienced through face-to-face courses, an award-winning digital library, hundreds of virtual offerings and blended experiences. Clients choose to partner with Hemsley Fraser for three reasons; innovation, flexibility and great design.



About 5App

5App was founded to deliver leading edge digital solutions across devices and locations, initially specialising in enterprise app deployment. Partnered with Hemsley Fraser since 2013, the five-year partnership has led to the development of the Engagement Hub – delivering digital learning content and company comms to engage teams and individuals across enterprises. The platform can be used by learning, HR and business professionals to organise and deliver resources to the right people at the right time, whatever device they have and wherever they are.

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