Six trends that define e-learning in 2018

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Executive summary

T his white paper identifies six trends that impact the learning and development landscape in 2018 and beyond. These trends have been identified through analyzing our own research data and combining it with existing research. Besides identifying trends, this paper also provides recommendations on how to react to them by suggesting a coherent learning strategy.

There is a growing need for *creating content quickly*. Content creation can be accelerated using a learning solution that facilitates *(re)using templates* and content. This also ensures a lower learning curve for creating e-learning content. Simplifying the creation process in this way, enables employees to create their own learning content. This trend of employees creating learning content is called *employee-generated learning*. It empowers any employee within an organization to create e-learning courses on topics in which he or she is an expert. It is cost-effective and allows for easy localization. We have also found that *mobile learning* has become indispensable.

Mobile devices can be used to supply small nuggets of learning content through a method known as *microlearning*. Finally we see a *shift away from traditional learning management systems* and a growing awareness of the *pitfalls of massive open online course (MOOCs)*.

Our recommendation is to opt for a responsive and cloud-based tool. Importantly the tool should allow instant knowledge sharing and facilitate the creation of learning paths that provide e-learning nuggets. Combining such a tool with a cohesive learning strategy that encompasses the described trends, helps to optimize learning processes inside any organization.

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Introduction and Methodology

The field of learning and development (L&D) is constantly changing: new innovations arise, different methods come into play and trends from the past often prove ineffective in the longer term. Most existing content on (online) learning-related topics is based on very limited factual information. Besides this lack of comprehensive information, the market is also changing rapidly. These factors make it rather difficult to keep up with all that is happening. In contrast to many articles and papers on e-learning and L&D, the current paper bases its findings on primary research. Its purpose is to provide insight into the significant trends and changes facing the L&D field today. Yet, in addition to this descriptive function, the paper also provides recommendations and practical solutions on integrating these insights into your own organization's L&D strategy.

For the purpose of this report a quantitative study was carried out. This study used a large-scale survey with a sample size of nearly 600 learning managers, learning directors, instructional designers and trainers working for multinational companies. To corroborate our findings, we integrated a body of existing research with our own results.

Six prominent trends

The sections that follow analyse the most important trends we identified and examine their possible implications for the L&D community. Each section contains a concise recommendation related to the trend discussed. The final section, "The way ahead", compiles these recommendations to form a clearly defined learning strategy.

Urge for fast content creation

Employee-generated Learning

Imploding demand for LMS

Indispensability of mobile learning

Bite-size is the right size

Ineffectiveness of MOOCs

Urge for fast content creation

E-learning content no longer has to be created from scratch using clunky, outdated tools"

Until quite recently, instructional designers were accustomed to working with labor-intensive tools to create e-learning content. Content had to be created from scratch and the know-how needed to create it was solely in the hands of instructional designers. Creating an online course was a daunting, tedious process. As a result, costs were high and turnaround times were lengthy. Because of the long creation process, content was often outdated before it was even released. To make matters worse, learning to use these complicated e-learning tools was also time-consuming.

Fortunately, things have changed significantly. In recent years, instructional designers have taken on a new role. Instead of creating content-heavy courses for others, they now focus on facilitating instant knowledge-sharing.

User-friendly e-learning tools are readily available, this has significantly changed L&D processes. E-learning content no longer has to be created from scratch using clunky, outdated tools. A variety of innovative tools, are easy to use and include built-in templates, allowing for the reuse of content. These features significantly accelerate the e-learning creation process.

During our quantitative study, we asked instructional designers and (training) managers about content-creation methods. As shown in *Figure 1*, instructional designers still prefer the method of creating content from scratch. Managers and directors, on the other hand, increasingly see a need for templates and reusable content since this directly decreases the time to market.

Fig.1. Importance creating content from scratch

Trainer	Instructional Designer	Training Manager	Director L&D	CLO
7.1	7.5	7.4	7.2	6.9
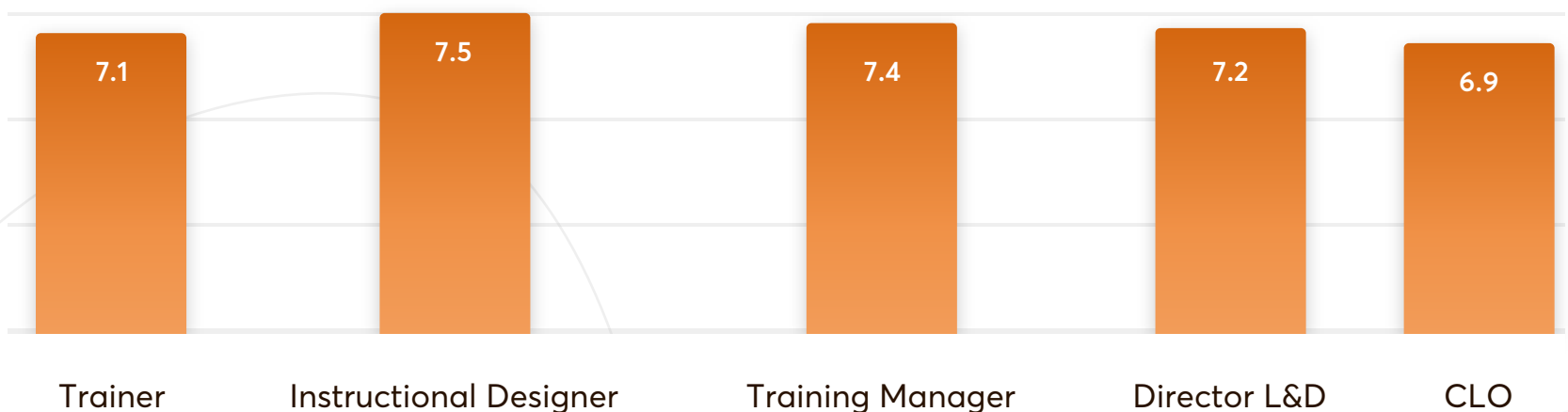
From a business perspective, e-learning must be cost-effective while still serving its purpose. Not every e-learning course needs to be a tailor-made work of art. An efficient method for achieving fast, cost-effective learning is reusing content and templates. The content can still be customized but the design process becomes far less time-consuming. According to Pappas (2015), ready-made and customizable e-learning templates greatly improve your productivity and enhance the overall quality of your e-learning courses. With this approach, virtually any learning goal can be achieved without having to build content one pixel at a time. In most cases, pixel-perfect design is not even relevant. We recommend rethinking and moving away from this pixel-perfect design mentality.

" Not every e-learning course needs to be a tailor-made work of art "

Employee-generated learning

As the threshold for e-learning creation disappears, a wide range of opportunities present itself. Today, anyone can share knowledge instantly, efficiently and inexpensively. The widest-reaching implication is that content creation will now shift from people who specialize in e-learning design, to people with knowledge about the actual content. Any employee within an organization can now create e-learning courses about topics in which he or she is an expert. We refer to this type of learning as employee-generated learning. Our data revealed that chief learning officers – who are seen as ambassadors for change in an organization – already view employee-generated learning as a vital learning method *(see Figure 2)*.

Fig.2. Importance Employee-generated Learning

Trainer	Instructional Designer	Training Manager	Director L&D	CLO
5.9	5.8	6.2	6.4	7.2

Since chief learning officers recognize the importance of employee-generated learning, this trend is likely to spread to other parts of organizations. Enabling employees to create learning content allows them to instantly share knowledge with their peers. Moreover, there is significant dissatisfaction with traditionally created learning content in Asia, the Middle East and Africa. In these regions, learning content is often translated rather than localized. This leads to a disconnect between the content and the learner. The content is usually created by Western learning developers. The user experience and design also target Western learning preferences and therefore do not always resonate in other regions (Adkins, 2017). Empowering employees worldwide to create and/or adapt their own learning content is a simple, cost-effective solution to this problem. Employee-generated learning allows for truly localized content that transcends culture and language barriers. Furthermore, the evolving role of e-learning platforms and growing need for instant knowledge-sharing are highly compatible with employee-generated learning programs.

" Employee-generated learning allows for truly localized content that transcends culture and language barriers "
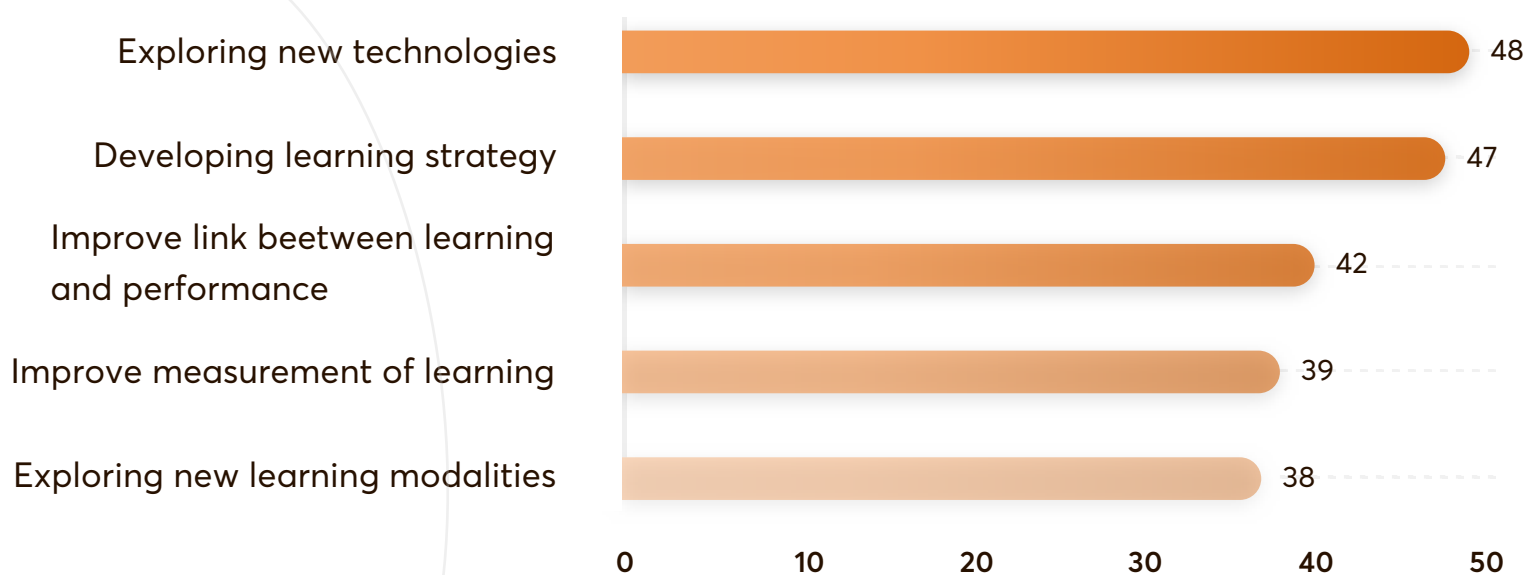
The imploding demand for LMS

The worldwide learning management systems (LMSs) demand went down with a notable 14.6% in 2016. L&D market research firm Ambient Insight (2016) predicts global LMS revenues will drop from the current US$ 7.1 billion to US$ 3.2 billion by 2021. This represents a turning point in the use of learning platforms.

However, it does not imply that e-learning itself is decreasing in popularity. This is nicely illustrated by the Brandon Hall Group (2016), they found that the highest priority for L&D is to explore new and different learning technologies *(see Figure 3)*. The described findings indicate that the e-learning market is in motion and buyers are seeking non-traditional solutions.

Fig.3. L&D priority Ratings in percentages (n=302)

Category	Value
Exploring new technologies	48
Developing learning strategy	47
Improve link beetween learning and performance	42
Improve measurement of learning	39
Exploring new learning modalities	38

"Instant knowledge-sharing is becoming the norm"

If the demand for LMS is plummeting, which platforms or tools will replace them? Many organizations are migrating from traditional LMSs to competing products which often require no LMS at all.

Cloud-based, software-as-a-service (SaaS) tools easily allow organizations to make a transition from one system to another. Licenses or subscriptions for these services are generally flexible, and the data is stored in the cloud so it can easily be exported when needed. As a result, we are witnessing a new dynamic in the L&D world in which buyers can now shop around for the right tool.

Instant knowledge-sharing is becoming the norm. Traditional LMSs involve slower processes which are not conducive to instant sharing of information. Demand for LMSs is declining, but it is not disappearing. We predict that the role of LMSs will evolve to serve formal purposes such as general onboarding or compliance training. These more complex forms of e-learning design will also continue to require the skills of instructional designers.

> " *Mobile learning is not a 'nice-to-have' but a 'must-have'; it has become indispensable* "

Mobile learning becomes indispensable

Companies turning away from traditional LMSs is partly due to the growing demand for fully responsive solutions. The ubiquity of mobile devices permanently connected to 4G networks in the global market must be taken into consideration.

Considering the significance of mobile devices in everyday life, it is logical for these devices to also play a principal role in L&D. Recently, the trend toward mobile learning has skyrocketed in many regions.

A region that clearly demonstrates this trend is China. An immense 70% of the L&D revenue in China can be derived from mobile learning technologies and apps (Adkins, 2016).

In first world countries, it is common for people to own a mobile device as well as a PC. In developing countries, however, mobile devices play a far greater role. Here, most people rely solely on smartphones and often do not own a PC. The result is a leapfrog effect, in which e-learning in these countries bypasses the PC and occurs almost exclusively through mobile technologies. This has led to a boom in the global demand for mobile learning solutions. The decline in revenues from traditional LMSs is also closely related to this shift (Adkins, 2016). Mobile learning is not a "nice-to-have" but a "must-have"; it has become indispensable and is increasingly the primary source of learning. This shift in focus toward mobile learning will continue to dominate the L&D industry.

Bite-size is
the right size

Mobile learning has given rise to the effective use of small learning "nuggets" as opposed to traditional, full-length courses. These small units of information cater to modern learners whom Avery (2016) characterizes as overwhelmed, distracted, and impatient. The solution, in Avery's view, is to "create high quality and valuable microlearning content." He advocates dividing learning segments into short sessions (shorter than 15 minutes).

The majority of content should be aimed to take no longer than six minutes to consume. "Microlearning" refers to this method of imparting information using short, easily digestible, well-planned units. Mobile devices are highly suited for supplying these units to learners.

Condensing content into bite-size pieces makes e-learning more effective. Tools that use this method to condition the brain have been found to significantly improve memory, attention, linguistic skills, planning skills and even problem-solving skills (Adkins, 2017). Therefore, when opting for an e-learning solution, full (mobile) responsiveness should be a key criterion. Additionally, the solution should include options for providing microlearning via mobile devices.

Ineffectiveness of MOOCs

Massive open online courses (MOOCs) were once considered the game changer in the e-learning world. In recent years, a considerable amount of MOOCs have been put into practice. These courses proved highly effective in reaching large numbers of people simultaneously. Reaching a large audience is one thing, achieving successful results among learners is another thing altogether. Research shows that MOOCs were found to suffer from high dropout rates and a low learning impact. Tseng et al. (2016) identified a significantly high dropout rate of MOOC' learners, after analyzing the learning behaviours of 1,489 learners on a MOOC platform. Their recommendation for decreasing dropout rates is to carefully design the course and promptly identify when learners display risk behaviors of dropping out.

*" There is a clear division in opinion on the importance of MOOCs in the future "*

Our own research found that almost 40% of the L&D stakeholders in our sample do not see MOOCs playing an important role in the next two years. A majority of around 60%, however, do think MOOCS will play an important role. This indicates a clear division in opinion on the importance of MOOCs in the future. In contrast, the vast majority agrees that learning by doing still will be a very important learning method *(see Figure 4)*.

Fig.4. Importance of MOOCs vs. on-the-job learning for the next two years

Massive Open Online Courses (MOOCs)
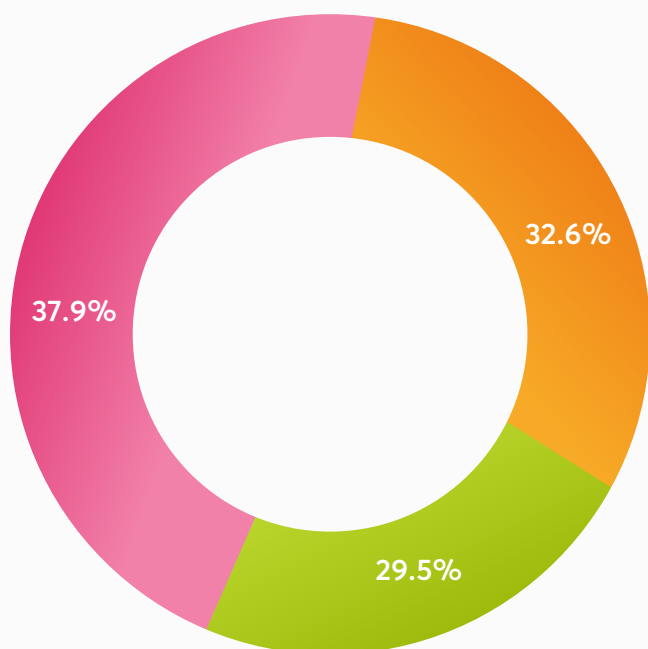
On-the-job learning (learning by doing)

32.6%

37.9%

29.5%

9.7%

3.2%

87.1%
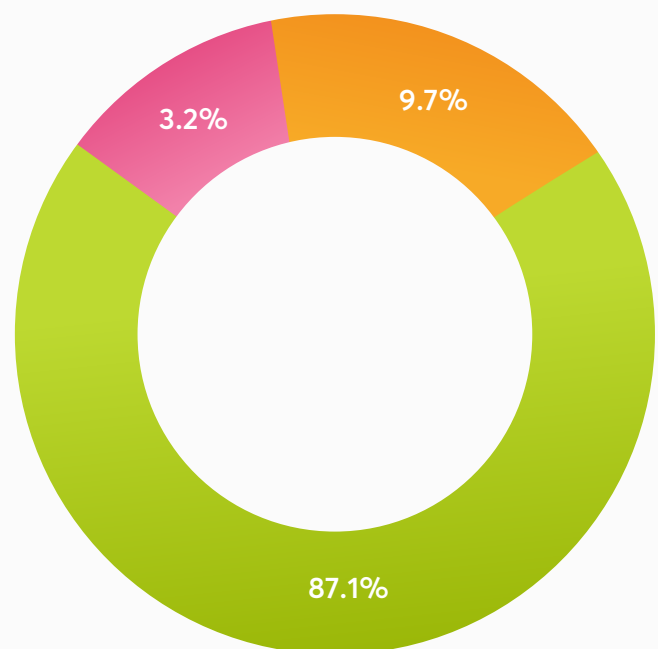
● Very Important

● Important

● Not Important

One of the issues with MOOCs is that they are designed to reach very large audiences at once. As a result, there is very little attention to individual differences among learners. When it comes to learning, one-size-fits-all solutions are often less effective compared to more customized approaches. A common feature of MOOCs in the academic world is that they are offered to the public at no cost. As a consequence, there is almost no threshold to enroll. When somebody pays for a course, it shows they are committed to get the most out of it. A free course on an interesting topic may be enough to entice you to enroll, whereas you would think twice before enrolling if there were costs involved. Learners being less motivated from the start is another factor for the lower percentage of people achieving positive results in MOOCs.

Taking the pitfalls into account, MOOCs can be a valid part of a broader L&D strategy. However, it is important to be aware of the potential lack of learner' motivation and limitation to individualised approaches. To avoid these problems while still successfully engaging a large audience, MOOCs should be put into practice combined with effective, methods such as microlearning on mobile devices and smaller-scale on-the-job training.

The way ahead

This paper has examined six L&D trends and their consequences for 2018 and beyond. These trends are by no means isolated from one another, rather they are deeply interconnected and should be considered in unison to form a coherent L&D strategy.

The growing need for *rapid content creation* can be addressed by choosing a learning solution that facilitates *reusable templates and content*. Reusing content simplifies content creation. Simplifying the process helps to empower employees to generate their own learning content. This method of *employee-generated learning* is cost effective and enables content to be localized for diverse learning communities in a simple, organic manner. Ideally, this content should be supplied to learners in the form of *microlearning via mobile devices*. Our research reveals that traditional learning management systems are less effective for facilitating fast-paced, employee-generated, mobile learning strategies. Finally, we conclude that MOOCs suffer from drawbacks including lack of learner engagement.

Implementing an effective L&D strategy that accounts for these circumstances may appear challenging. However, there are a variety of cloud-based authoring tools with a low learning curve that fit these trends. When opting for a solution, make sure it allows for instant knowledge-sharing and facilitation for learning paths that provide e-learning nuggets. Using the right tools to implement a coherent strategy ensures an effective and future-proof e-learning program.

The success story of how the multinational, Nielsen, has implemented a companywide learning strategy as described above can be found in this short case description.

For more information on our research and access to our full research results, please reach out to k.spiro@easygenerator.com. We are more than happy to share our results with you.

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