

The Conference Board of Canada  
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# **E-LEARNING IN CANADA FINDINGS FROM 2003 E-SURVEY**

TOP LINE FINDINGS FROM A SURVEY OF THE CONFERENCE BOARD  
OF CANADA'S CUSTOMERS ON CURRENT E-LEARNING PRACTICES

A SPECIAL REPORT

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## Introduction

The Conference Board of Canada's Education and Learning Group undertook an e-survey on the current e-learning issues and practices of The Conference Board of Canada's customers.<sup>1</sup>

This survey represents the Conference Board's latest initiative in its ongoing research in e-learning. We firmly believe that e-learning practices will improve as organizations become better informed of both the benefits and the challenges of implementing e-learning.

More than three thousand of our customers were asked to fill in the e-survey during February-March 2003. 570 of these organizations responded to the survey. This special report summarizes the topline findings of the survey.

## Question-by-Question Findings

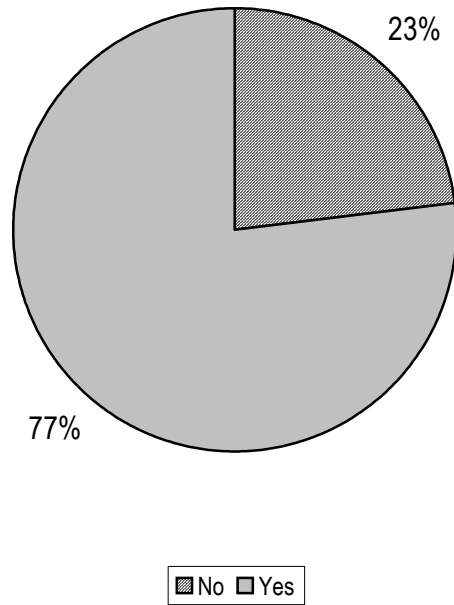
**Chart 1**  
**About the Respondents**  
**Total Responses\***  
**n=570**



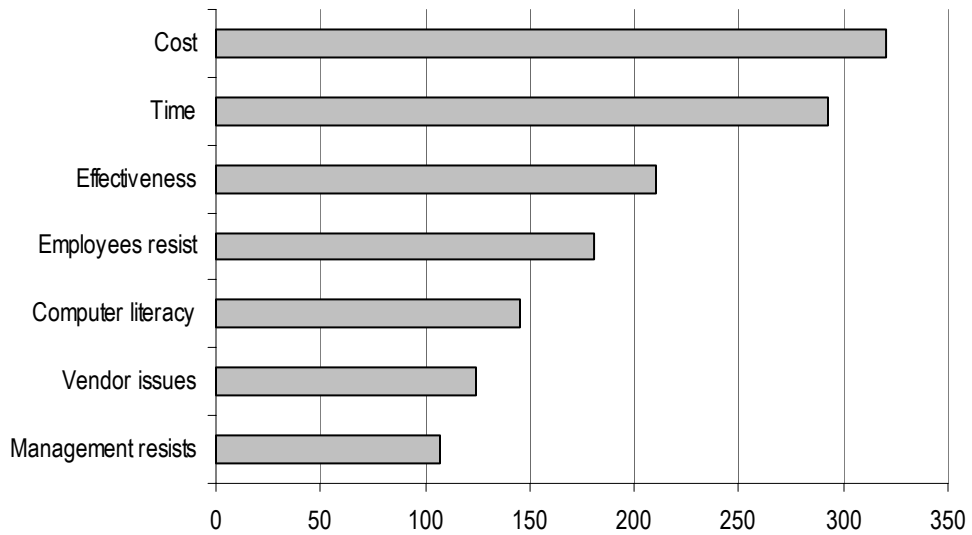
\*Note: the metric "total responses" is used for questions where respondents are limited to one response whereas "total mentions" is used for questions where a respondent can select more than one answer.

<sup>1</sup> The survey was conducted for the Conference Board by eLearn Solutions Group, a Toronto-based company that specializes in helping organizations understand e-learning ([www.eLearnSolutions.com](http://www.eLearnSolutions.com)).

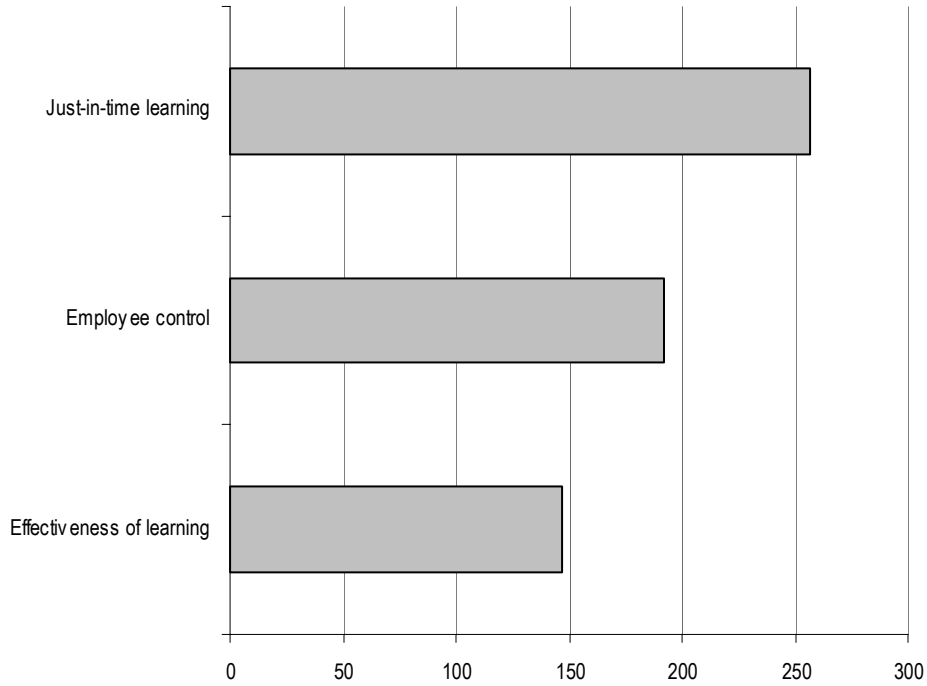
**Chart 2**  
**Is your organization currently using e-learning?**  
**Total Responses**  
**n=570**



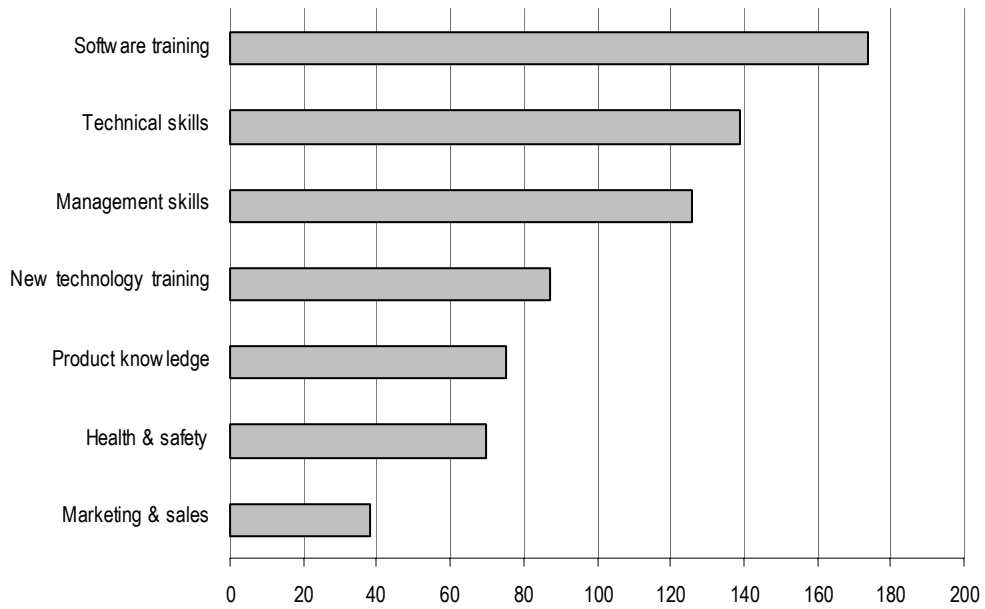
**Chart 3**  
**What do you personally believe are the main challenges to implementing e-learning in your organization?**  
**Total Mentions**  
**n=570**



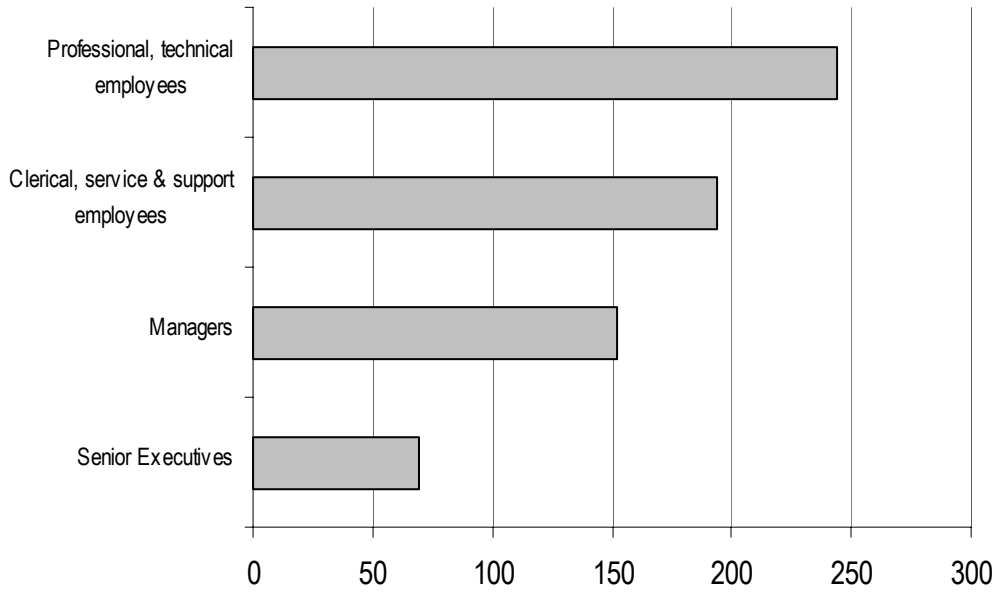
**Chart 4**  
**In your view, what are the key benefits associated with e-learning?**  
**Total Mentions**  
**n=570**



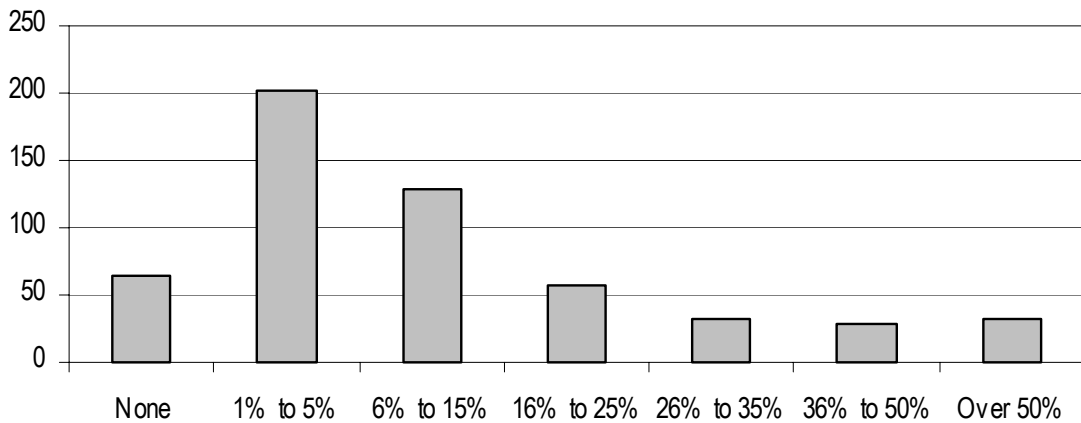
**Chart 5**  
**For what do you currently use e-learning?**  
**Total Mentions**  
**n=570**



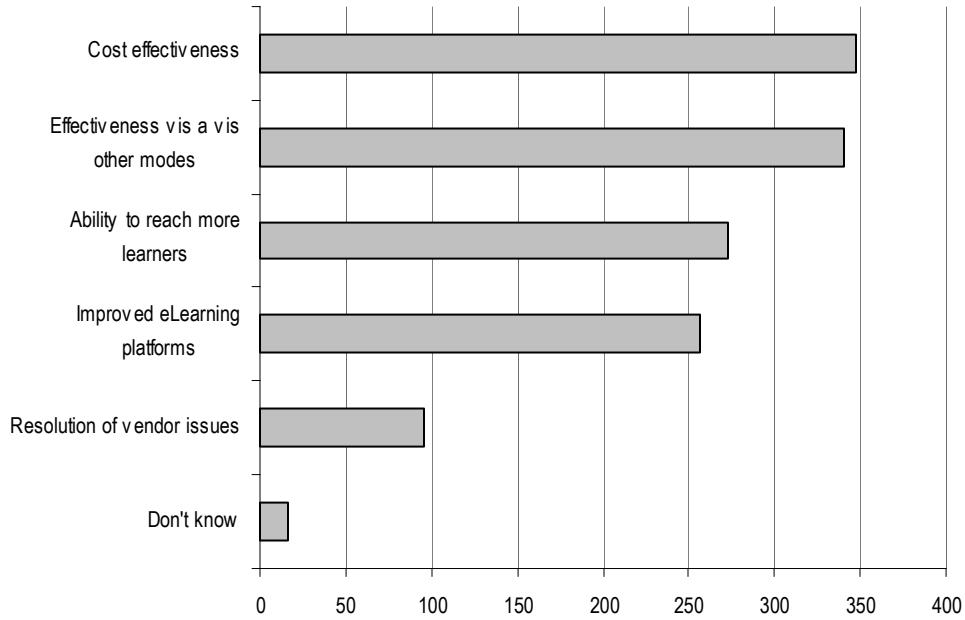
**Chart 6**  
**What type of people use e-learning in your organization?**  
**Total Mentions**  
**n=570**



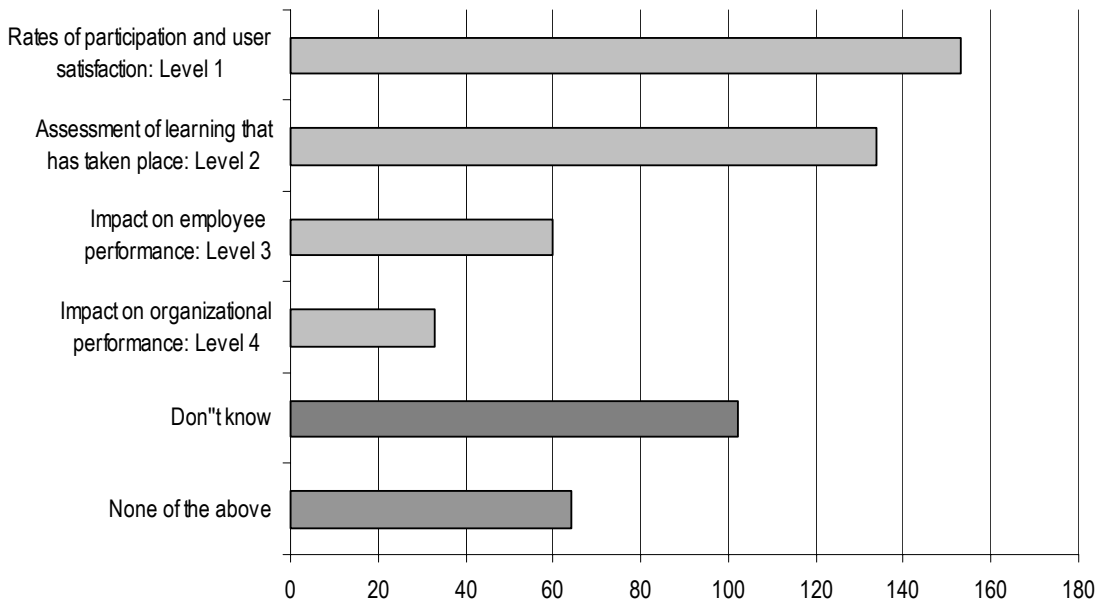
**Chart 7**  
**What share of your training effort is delivered through e-learning?**  
**Total Responses**  
**n=544**



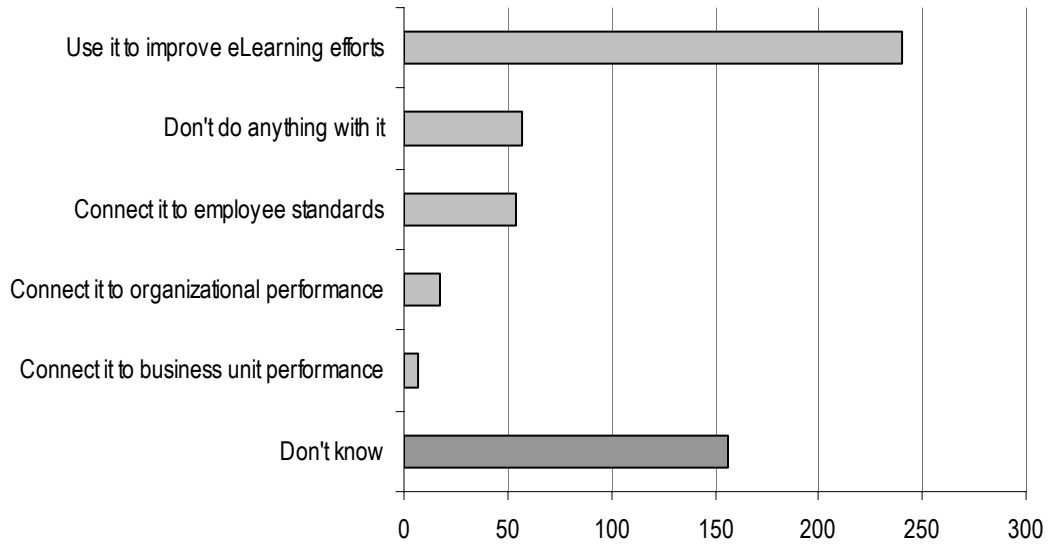
**Chart 8**  
**What will determine your use of e-learning in the next two years?**  
**Total Mentions**  
**n=570**



**Chart 9**  
**What is the highest level at which your organization evaluates its e-learning efforts?**  
**Kirkpatrick's Training Evaluation Scale, Levels 1 - 4**  
**Total Mentions**  
**n=546**

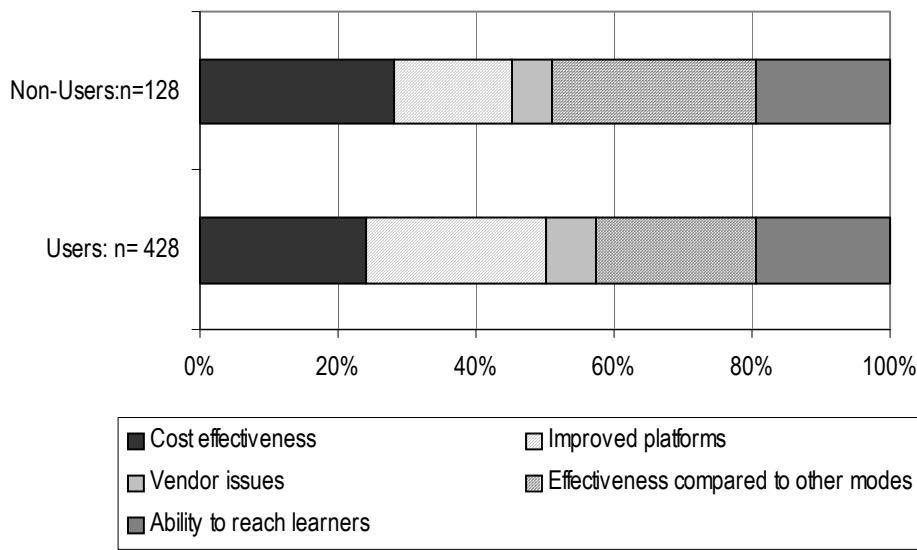


**Chart 10**  
**What does your organization do with its evaluation of e-learning?**  
**Total Responses**  
**n=531**



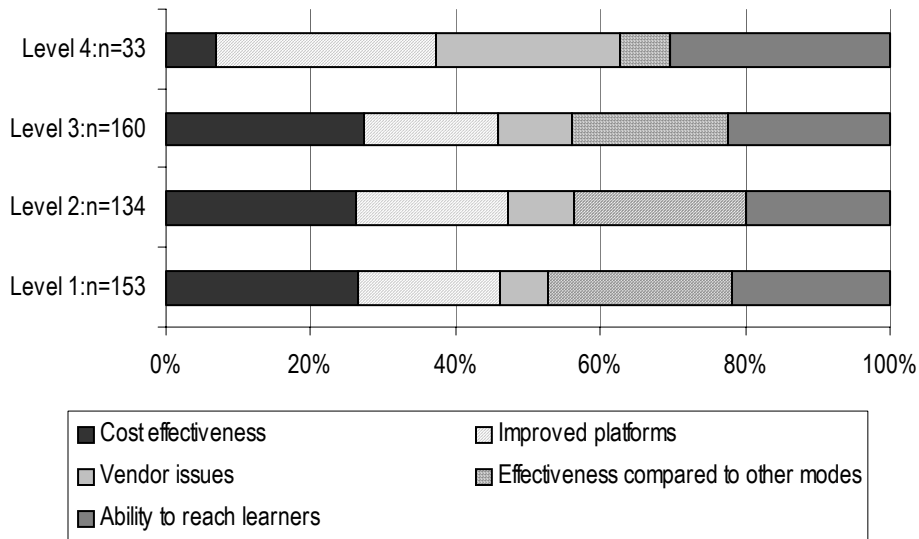
## Some Other Interesting Findings

**Chart 11**  
**Comparison of users and non-users on factors driving future use**  
**Per cent distribution of mentions**  
**n=556**



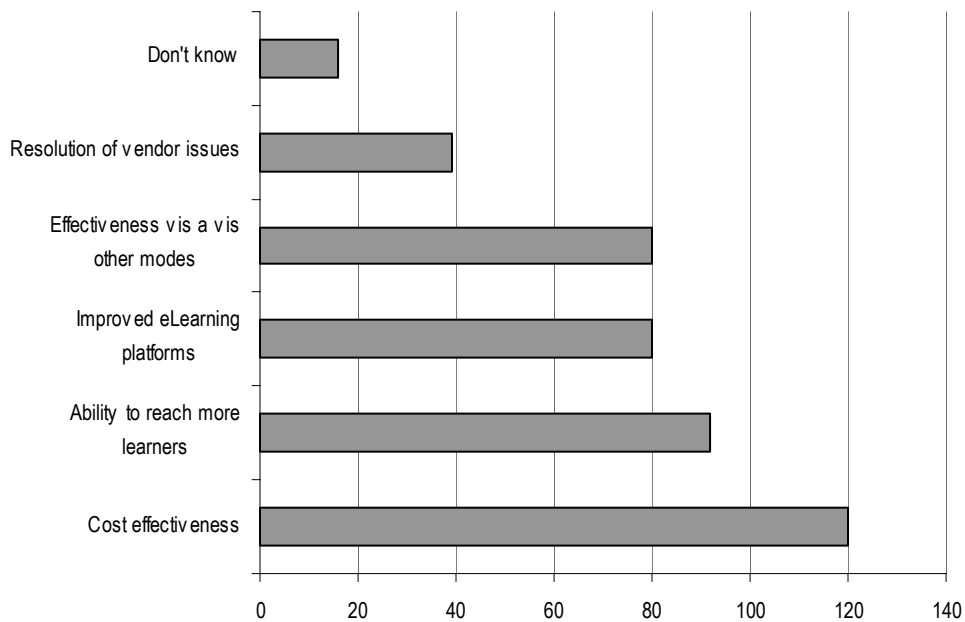
**Chart 12**  
**Comparison of Kirkpatrick's Evaluation Levels With Issues To be Addressed as Organization Moves Forward**

**Per cent distribution of mentions**  
**n=480**



**Chart 13**  
**Issues Impeding “low adopters” (e-learning=1 to 5 per cent of total training) from moving forward**

**Total mentions**  
**n=201**



## Summary Conclusions

### *On Users and Usage*

- 77% of respondents' organizations are using e-learning to some degree.
- The main uses of e-learning are, in order, for: 1) software training; 2) technical skills training; 3) management skills development.
- The main users of e-learning are, in order: 1) professional and technical employees; 2) clerical, service and support employees; 3) managers.
- E-Learning only accounts for a small percentage of respondent organizations' current training efforts. For **37%** of respondents, it represents **1 – 5%** of their total training effort, for **24%**, **6 – 15 %** of training effort, and **12%** do not do any e-learning.
- Only **6%** of respondents noted that e-learning represents more than **50%** of their total training effort.

### *On Challenges and Evaluation*

- The main **challenges** to implementing e-learning are, in order: 1) the **cost** of developing or purchasing e-learning solutions; 2) the **time** required to develop e-learning; 3) the need to be convinced of e-learning's **effectiveness** as compared to other training modes.
- Very few organizations are doing high-level evaluation of their e-learning efforts. Using Kirkpatrick's training evaluation scale, **153** respondents are using **Level 1** evaluation (rates of participation and user satisfaction), **134** are using **Level 2** (assessing learning that has taken place), **60** are using **Level 3** (measuring impact on employee performance), and **33** are using **Level 4** (measuring impact on organizational performance). This is consistent with findings for other, more traditional, modes of training.
- More respondents answered "don't know" (102) or "none of the above" (64) than for Level 3 or 4 evaluation.
- Most respondents note that they use evaluation to improve their e-learning efforts (240). Very few respondents are using evaluation to improve overall organizational performance (17), or business unit performance (7).

- In comparing the level of evaluation of e-learning efforts that organizations undertake against what these survey respondents think will drive future use of e-learning, it is interesting to note two very prominent correlations:
  - Of the 33 organizations doing Level 4 evaluation (measuring impact on organizational performance), only 4 indicated that they would need to be convinced of e-learning's cost effectiveness. Conversely, of the 153 organizations doing Level 1 evaluation (rates of participation and user satisfaction), 98 indicated that they would need to be convinced of e-learning's cost effectiveness.
  - Also, there is a clear inverse relationship between the level of evaluation undertaken by an organization, and the need to be convinced of e-learning's effectiveness versus other modes of training. Those undertaking higher levels (3 and 4) of evaluation are more convinced of its effectiveness than those doing lower level rudimentary evaluation (1 and 2).
- A sizable number of respondents need to be convinced of e-learning's effectiveness (210), and a sizable number are convinced that it does improve effectiveness (147).

### *On Benefits and Future Use*

- The main **benefits** of e-learning are, in order: 1) the ability of have **just-in-time workplace learning**; 2) employees have **greater control** compared to other modes of learning and training; 3) it improves the **effectiveness** of workplace learning.
- The top three underlying forces or **drivers** that will determine future use of e-learning are, in order: 1) **cost** effectiveness; 2) its **effectiveness** versus other modes of training; 3) its ability to **reach** more learners in the organization.