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The Learning Trends Index

Survey Report 5

August 2012



Acknowledgements

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1. Introduction

1.1 Background to the UK Learning Trends Index

GoodPractice, Reed Learning and INL Consultancy work in partnership to produce and disseminate the *UK Learning Trends Index*. Run every six months, the Index is now in its third year of publication. This report covers the fifth set of survey results. It aims to provide a comprehensive assessment and analysis of the key trends and issues that have emerged across the Learning and Development (L&D) industry during the two and a half year period from June 2010 to November 2012 and beyond. The next survey is scheduled to take place during November 2012, and will continue to be run on a bi-annual basis each June and November thereafter.

1.2 Composition of the UK Learning Trends Index

The survey consists of four main questions, the focus of which have remained broadly the same since the first survey's inception in June 2010. On occasion we ask respondents to comment on new areas of topical interest within the UK L&D profession. Appendix 7.1 contains a full list of the survey questions and a breakdown of the responses. The key questions are as follows:

Question 1 asks respondents to rate their expectations for the coming six months (from June 2012 to November 2012) around eight topics. These include L&D's impact on the wider business, its perceived status and the availability of resources for L&D activity.

Question 2 asks respondents to indicate the extent to which the UK's economic situation will impact upon their L&D functions in the coming six months in relation to eleven topics. These include the overall emphasis on learning activity in their organisation, their reliance on informal learning and the shift towards using technology.

Question 3 explores the changes respondents expect in their allocated budget spending against eight different categories of learning activity. These include spending on external coaching and other forms of outsourced delivery, in-house training, technology-based learning, social media and informal learning support.

Question 4 asks respondents to identify the top three business drivers which will impact on their L&D department, and the top three areas on which they will focus most activity upon over the coming six months to November 2012. In this section we also asked respondents two additional questions about whether they have a specific strategy for informal learning, and whether they have recently trialled or launched a mobile learning initiative.

1.3 Report context

Two years have now passed since June 2010, when Chancellor George Osborne presented his austerity plans to revive the UK economy. At that time, he predicted that the economic picture would gradually improve throughout 2011 and into 2012, with a growth rate of 2.8% predicted for 2012. In reality, the figure is far from that, and represents a contraction of 0.3% for the first quarter of 2012.¹ Rather than building on early signs of recovery, economists have stated that the UK has fallen into a 'double dip' recession.

Against this backdrop of a stalled economic recovery, coupled with rising unemployment rates (8.1% in June 2012) and limited business growth, Osborne has faced considerable pressure to revise his programme of cost cutting. However, in his 2012 budget, which was presented in late March, he vowed to stick to his original plan in order to reduce the UK's budget deficit. The government has already admitted that it is already behind schedule with these plans, which are now expected to continue way beyond the next general election which is scheduled for 2015.²

So what does this mean for the future of UK businesses and the role that L&D can play in supporting organisational growth? Economists and politicians have little doubt that the road to economic recovery will be a long one, and organisations in both the public and private sector face continued pressure to raise their game. The L&D function has undergone a significant shift in focus from training provider to strategic partner in aiding growth, and it will be interesting to see how L&D's position develops.

On a more positive note, it is hoped that this somewhat gloomy start to 2012 will improve over the course of the coming year, reflecting an improved global economic picture, reduced inflationary pressure and a welcome boost from the summer Olympics. For example, the CBI predicts that GDP will grow by around 0.6% in 2012, coupled with a modest increase in business investment. It will be interesting to track how the UK economic picture develops over the course of 2012, and we will provide a full round up in the next *UK Learning Trends Index* report, which is due to be published in early 2013.

¹ Office for National Statistics, Quarterly National Accounts for Q1 2012. Available at: www.ons.gov.uk/ons/rel/naa2/quarterly-national-accounts/q1-2012/stb--quarterly-national-accounts-q1-2012.html.

² Julia Werdigier and Landon Thomas, 'British Budget Adheres to Austerity While It Cuts the Top Tax Rate', The New York Times, 21 March 2012. Available at: www.nytimes.com/2012/03/22/business/global/britain-sticks-to-austerity-in-new-budget-plan.html.

1.4 Methodology

As with previous reports, the survey questionnaire was developed using an online survey reporting tool. The survey questionnaire was sent out in early June 2012. All responses were collected online during June and July 2012. Responses were then analysed using a range of quantitative analysis techniques.³

For the fifth survey, invitations were sent to a population of around 1300 **senior and middle management L&D professionals**. These were drawn from client and non-client contacts of GoodPractice and our survey partners INL Consultancy and Reed Learning. The Corporate eLearning Consortium and the Charity Learning Consortium also publicised and promoted the survey to their members.

The online questionnaire used a mixture of multiple choice and ranking-based questions. These allowed us to collect a strategic L&D perspective on some of the most important challenges and issues facing the learning and development profession today.

It should be noted that there was a slight change to the presentation of the survey questions. This was made to reduce the overall time needed to complete the survey online. Questions in each of the four sections were presented as part of a combined matrix, rather than in isolation. That way, respondents could view all the questions in a particular section at the same time.

We received a total of 300 responses to the fifth survey, which indicates a response rate of around 23%. We are pleased that participation rates have continued to rise with the publication of each survey, and we hope that this engagement and interest from the UK L&D community will continue to rise with future surveys.

³ As with previous surveys, Survey Monkey was used to develop the survey and collect data from the respondents. For more information see www.surveymonkey.com.

1.4.1 About the survey sample

For clarity and ease of interpretation, we have excluded any data received from international respondents. We also filtered out responses from employee and consultant level respondents (c80 responses) as the survey aims to represent the views of **senior UK based L&D practitioners** with responsibility for the strategic planning and budgetary control of their function's activities. The refined survey sample comprised 218 unique responses, which are represented as follows:

Breakdown by industry sector

| | |
|-----|-----------------------|
| 62% | private sector |
| 28% | public sector |
| 10% | not-for-profit sector |

Position in organisation

| | |
|-----|----------------------|
| 14% | Director or VP level |
| 37% | senior manager level |
| 49% | management level |

Size of organisation

| | |
|-----|--------------------------|
| 12% | less than 50 employees |
| 10% | 50-250 employees |
| 22% | 251-1000 employees |
| 10% | 1001-2000 employees |
| 46% | more than 2000 employees |

We will highlight any differences in the results that emerge from organisations of different sizes and from different sectors as appropriate throughout the report.

2. Executive Summary

2.1 Can L&D practice what it preaches?

The aim of the *UK Learning Trends Index* is to keep L&D practitioners in touch with the main issues and challenges affecting their industry. As well as providing a snapshot of current L&D opinion across a number of key topics, this latest survey included questions focused on current trends. Key questions we asked respondents to provide opinion and comment on include key business drivers for their L&D function, their most important areas of L&D activity, and how spending habits and methods of learning delivery have changed, as well as the changing role of informal, social and technology based learning approaches.

As outlined in the headline findings section below, many of the trends identified in this latest survey point to an improved picture for L&D in terms of the function's internal perception of its ability to meet learning needs and, in particular, a growing interest in the use of technology and informal approaches to drive organisational learning. However, when this internal view is compared to actual L&D practice, it seems that the function may still have some way to go when it comes to consolidating the benefits of informal learning and implementing the right technological advancements.

We asked Nigel Paine, Strategic Advisor on Leadership and Talent development, to comment on the report's key findings and trends. He said: *"The report confirms a lot of assumptions: the move to mobile, the need for a strategy for informal learning and the impetus around employee engagement. But this confirmation is actually dynamite. It gives a locus and a context for all of those involved in L&D and the senior executives that support it."*

2.2 Headline findings overview

The key findings from the fifth UK Learning Trends Index are summarised as follows:

- strategic resourcing, impact and perception of L&D (Q1)
- L&D spending, approaches and embracing technology (Q2 and Q3)
- business drivers, key areas of L&D focus and hot topics (Q4)

2.2.1 Strategic resourcing, impact and perception of L&D

- In this section, the most noticeable trend is a significant increase in L&D's perceived **ability to meet the learning needs of the business**. In this survey 47% predict that this will improve in the coming six months, compared with 35% in the previous survey (+11%). The potential reasons for this are discussed in more detail in section 4.1.1.
- L&D's perceived **impact on corporate performance** remains broadly positive, with 59% (+2%) saying it would improve in the coming six months, and 34% (+3%) predicting no change.

- Furthermore, L&D's position as a **key strategic contributor to the business** remains strong. 55% (-3%) of senior Learning Managers say this will improve in the coming six months, and 37% see no change in this area (+5%). The overall **status of the L&D profession** has improved very slightly with this survey, with 38% (+4%) seeing an increase in the coming six month period, however, the majority (50%) feel there will be no change (+9%).
- The responses received in relation to the other areas covered in Question 1 highlight a similar picture of consistency and stability in terms of **strategic resourcing, impact and perceptions** of L&D. For example, 44% (+7%) of respondents say there will be no significant change in the **availability of resources for L&D** in the coming six months. Furthermore, 54% say that their **ability to attract talent** to their team will not change (+5%), and 29% (-6%) say it will improve.
- When it comes to the **quality of external learning provision**, senior L&D opinion is that this remains consistently high, with 88% saying this has improved. This figure is the same as the previous survey. However, despite these improvements in quality, the **extent of external learning provision** remains the same, with 64% (+2%) seeing no change in this area.

2.2.2 L&D spending, approaches and embracing technology

- Key issues discussed in this section include the **impact of the economy** on L&D's approach to spending, its approach to different types of learning delivery and the extent to which technology is embraced as a key learning medium. There appears to be a stronger overall **emphasis on learning** with this survey, with 36% (+11%) of senior Learning Managers predicting this will increase in the coming months.
- As indicated by previous surveys, the perceived **shift towards using technology** (such as e-learning and other virtual learning delivery methods) remains consistently high, with 76% (+3%) saying this will increase and 20% (-5%) seeing no change. **Spending on technology-based learning** (such as e-learning programme development) remains high, with 64% (-1%) seeing an increase and only 3% (-2%) saying it will decrease.
- As was the case in previous surveys, **reliance on informal learning** stands out as a positive trend with 60% (-5%) reporting that this will continue to increase in the coming six month period. **Spending on informal learning** support remains consistent, with 42% (-15%) saying this will increase, and 55% (+17%) seeing no change.
- **Use of social media** in learning solutions continues to grow, with 54% (-9%) predicting an increase in this area in the coming months.
- **Staffing levels** within L&D departments also remains broadly comparable with previous survey results, with 61% (-5%) seeing no change and 10% (-7%) saying this will increase.

2.2.3 Business drivers, key areas of L&D focus and hot topics

- This section asked senior Learning Managers to identify the top three business drivers that would have the greatest impact on their L&D function over the next six months. For the first time in the survey's history, **improving employee engagement and commitment** is ranked as the most critical business driver for L&D at 68% (+5%). It is interesting to note that improving employee engagement has continued to rise in importance across all five surveys.
- **Improving organisational execution and efficiency** is ranked a close second at 67% (0%), showing no increase in percentage since the previous survey.
- **Cost reduction and containment** is ranked third in terms of overall importance for L&D at 51% (+7%), followed by **revenue growth** in fourth place at 36% (-12%). The continued importance of **compliance and regulation** brings it into fifth place at 28% (+5%). Indeed, the results for **compliance and regulation** across all five surveys highlight a continued upwards trajectory.
- In this section we asked respondents to comment on two new hot topics of particular interest. The first was whether their organisation had a **specific, agreed strategy for informal learning**. Only 24% said that they did have such a strategy, whilst the majority (76%) did not. The second new question asked whether respondents had launched or trialed a **mobile learning initiative** in the last six months (i.e. a learning or performance support initiative delivered via a handheld device). Around 21% reported that they had done so, while the majority (79%) said they had not. These responses are discussed in more detail in sections 4.4.3 and 4.4.4.

3. Key Findings

From our perspective, four main findings have emerged from the fifth *UK Learning Trends Index*. These are summarised as follows:

3.1 Improving employee engagement is now L&D's top business driver

In earlier editions of the *UK Learning Trends Index*, maintaining organisational efficiency and execution reigned as L&D's top business driver by a considerable margin. However, in the three years since the first survey was conducted in May 2010, the gap between maintaining organisational efficiency and other key business drivers has lessened. In this latest survey, organisational efficiency has been overtaken by **improving employee engagement** for the first time. Although the gap between these top two business drivers remains small (1%), it is important to note that employee engagement has continued to rise in importance across all five UK Learning Trends surveys.

L&D clearly has a fundamental role to play when it comes to keeping employees committed to their organisation. Research conducted by the Institute of Employment Studies (IES) underlines how training and development underpins employee engagement. One of the strongest drivers of engagement is giving employees regular opportunities to grow and develop in their roles.⁴ Creating a variety of performance boosting learning opportunities is therefore critical in order to raise engagement levels. A recent study by the American Society for Training and Development (ASTD) reinforces this view: *"The quality of learning and training as well as the breadth of such opportunities positively influences and boosts engagement in organisations to a high or very high extent."*⁵ The challenge for L&D in the future will be its ability to continue driving improvements in employee engagement, and to promote a learning culture where engaged employees can thrive.

3.2 Leadership development is still critical, but L&D's focus has broadened

As with the previous four sets of *UK Learning Trends Index* data, **leadership development** has retained its place at the top of the L&D agenda by a considerable margin (>20%). However, what is apparent from the latest survey data is that the wide gaps that were previously found between the other areas of focus in the top four have become almost negligible. There is now almost no difference in importance between the emphasis L&D departments place upon improving **management performance**, wider **talent management** and retention activities and **performance management** activities. This can be seen as evidence of an overall widening of L&D's agenda to encompass a broader remit of responsibilities. As the UK's predicted economic recovery continues to falter, the pressure placed upon L&D to design and deliver learning initiatives which will boost organisational performance across a range of key areas has undoubtedly grown.

⁴ Robinson, D. Perryman, S. & Hayday, S. 'The Drivers of Employee Engagement' Report 408, Institute for Employment Studies, April 2004. Research summary available at: www.employment-studies.co.uk/pubs/summary.php?id=408 (accessed July 2012).

⁵ ASTD, Dale Carnegie Training and The Institute for Corporate Productivity, 'Learning's Role in Employee Engagement', ASTD/i4cp Learning and Engagement Study 2007. Executive Summary available at: www.employeelearningweek.org/materials/Learnings_Role_Employee_Engagement_Executive_Summary.pdf (accessed July 2012).

3.3 Support for informal learning remains high, but is this translated into practice?

In the last few years, the L&D landscape has exploded with the rise of **informal** and social **forms** of learning. Nowadays, any L&D department worth its salt should be able to demonstrate an understanding of not only the value of informal learning but also an ability to optimise and enhance the informal learning opportunities in their organisation. In this survey, focus on informal learning continues to grow, with more than 60% of respondents telling us that their overall reliance on informal learning approaches will increase.

However, just under a quarter of our respondents said they had a **specific, agreed strategy** for informal learning. Despite this positive rhetoric about informal learning, our experience is that many organisations seem to struggle with setting out a clear business case for supporting informal learning and consolidating this increased 'reliance' into a formalised aspect of L&D's core objectives and indeed the overarching business strategy for organisational learning.

Although some commentators correctly argue that informal learning is not something which can be controlled or planned, GoodPractice Chief Executive Peter Casebow provides a strong case for having a distinct strategy for informal learning. He explains: *"You can have a strategy to influence the quality of informal learning that is already taking place. You can improve learning skills such as search skills, questioning techniques and analytical understanding of data. You can also create more opportunities for people to find answers and you can encourage people to share ideas and expertise. I think that any strategy for informal learning needs to include three basic areas: improving basic skills, creating opportunities and providing encouragement to share."*

3.4 Strong support for technology, yet mobile learning falters

A further trend that we have regularly identified throughout previous sets of *UK Learning Trends* data is a shift towards greater use of **technology-based learning**. In each survey, around 70% of respondents tell us that their organisation will use a variety of technologies to deliver learning. A similar number say that their spending will also increase in this area.

Despite these positive messages about the use of technology, it seems that implementation of **mobile (or m-learning)** solutions, which is a key area of L&D technology advancement, has stalled among many UK organisations. Only 21% of respondents said that they had taken steps to either launch or pilot a mobile learning initiative in the last six months. These results are disappointing given the strong focus on using technology to enhance L&D's impact on organisational performance. This issue is explored further in Section 4.4.4.

4. Summary of Responses to the Four Main Questions

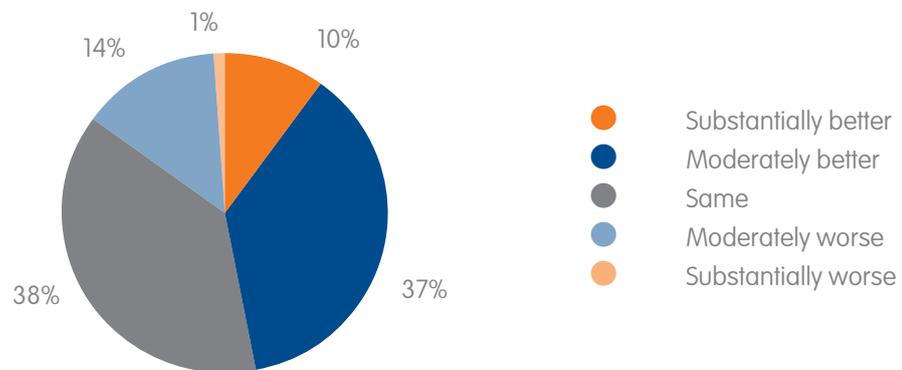
4.1 Responses to Question 1

Question 1 asked respondents to rate their expectations for the coming six months (June 2012 to November 2012) in relation to eight topics.⁶

4.1.1 Your ability to meet learning needs

As shown in Figure 1 below, 38% of respondents to the latest survey predict no change in L&D's ability to meet learning needs in the coming six months. However, 37% argue that their function will perform moderately better in this area compared to the previous six months, and a further 10% say L&D's performance will be substantially better. These figures represent an improvement on the previous survey results.

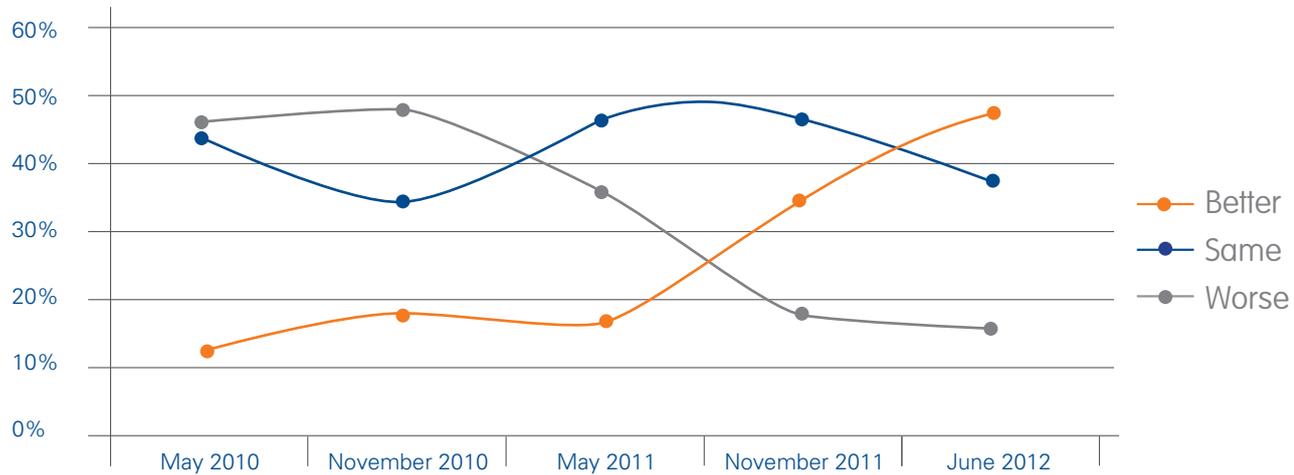
Figure 1: Your ability to meet learning needs (June 2012)



⁶ Full details of all the responses to Question 1 can be found in Appendix 1.

Figure 2 below considers the full range of responses received to this question across all five surveys since May 2010. As shown by the orange line, which tracks respondents who say their ability to meet learning needs will be 'better' in the coming six months, the last two survey results highlight a considerable improvement in this key area. This figure has consistently risen since May 2011. It is accompanied by a corresponding fall in respondents who say that their ability to meet learning needs will be 'worse' (see grey line). This is perhaps indicative of a growing optimism amongst the senior L&D community about the function's ability to fulfil its key objectives and generate real value for the business.

Figure 2: Your ability to meet learning needs overview



It is clear that the role of L&D is undergoing significant change. Many L&D functions strive to act as strategic partners in the development of the leaders and managers of the future, rather than as traditional 'training providers.' Perhaps this increase in L&D's confidence in its ability to meet learning needs is a reflection of its stronger connection to senior management and closer alignment with core business needs. It will be interesting to track the responses to this question in future surveys, to determine whether this positive upwards trajectory will continue.

4.1.2 Your impact on corporate performance

In this survey, L&D's impact on corporate performance is predicted to improve slightly. As illustrated by Figure 3 below, 49% of Learning Managers say that this will be moderately better in the coming six months, while a further 10% say it will be substantially better. Only 7% say it will be worse and 34% predict no discernable change in this area.

Figure 3: Your impact on corporate performance (June 2012)

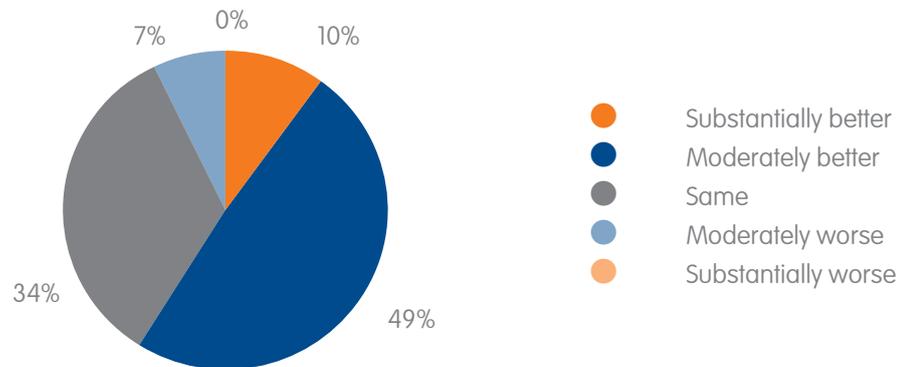
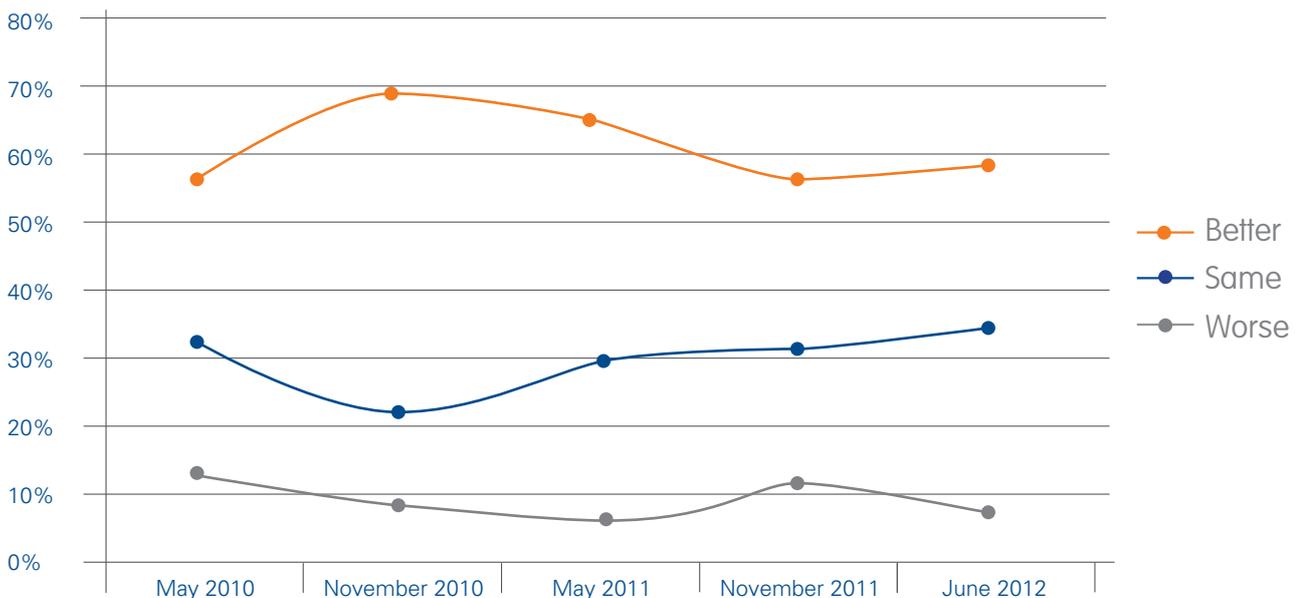


Figure 4 below considers L&D's impact on corporate performance over the previous two and a half year period to June 2012. It can be seen that although the overall trend has fluctuated slightly, the overriding feature is one of consistency. As shown by the orange line which charts respondents who say their function's impact on corporate performance will be 'better', there is little change in the overall figure across all five surveys. Across all surveys between 55 and 70% of senior Learning Managers consistently tell us that their impact on corporate performance will improve. This positive trend can perhaps be linked to L&D's improved ability to meet learning needs as outlined above.

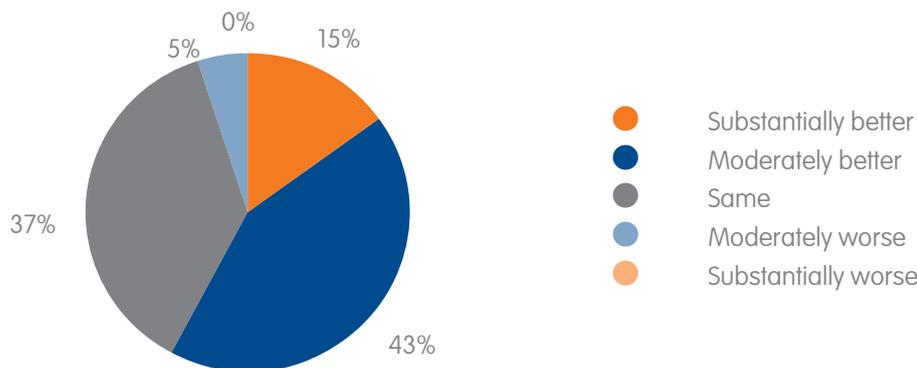
Figure 4: Your impact on corporate performance overview



4.1.3 Your status as a key strategic contributor

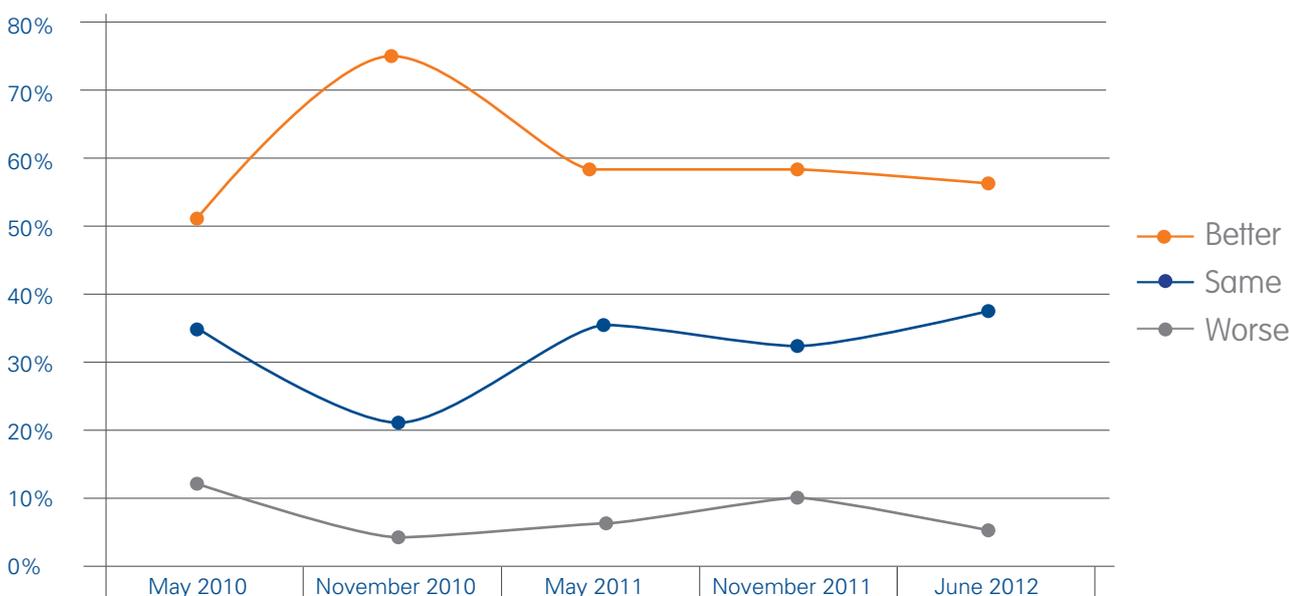
The responses received in relation to L&D's status as a key strategic contributor to the business are shown in Figure 5 below. Again, the figures from the latest survey are broadly positive, as 43% say this will be moderately better in the coming six months, with a further 15% reporting that it will be substantially better. 37% see no real change in this area, and only 5% think that L&D's status as a key strategic contributor to the business will worsen.

Figure 5: Your status as key strategic contributor (June 2012)



Looking at the picture that emerges for this area across all five surveys in Figure 6 below, it can be seen that L&D believes that its status as a key strategic contributor to the business has broadly increased over time. Following a spike in positive responses in November 2010, the percentage of senior Learning Managers who say L&D's status as a key strategic contributor will be 'better' has remained consistent at between 55 and 60%.

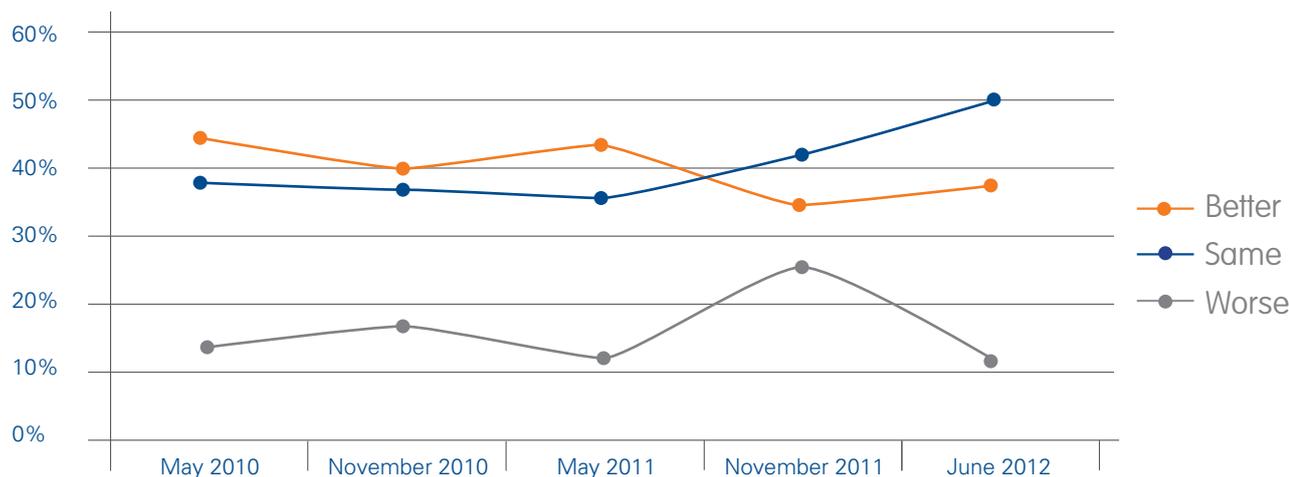
Figure 6: Your status as key strategic contributor (June 2012)



4.1.4 The status of the L&D profession

Figure 7 below considers the overall status of the L&D profession across all five surveys. Since November 2011, this picture has improved slightly, with the majority of respondents saying that L&D's status is either consistent or gradually improving with time. It will be interesting to continue to monitor and track responses to this question in future surveys, as L&D's perceived status is an important benchmark which describes the overall health of the profession as a whole.

Figure 7: the status of the L&D overview



A similar picture of consistency emerges across the remaining questions considered in Question 1. For example, 44% of respondents report no change in the availability of resources for L&D activity (+7%), 31% (-4%) report a reduction in resource provision and 25% an increase (-3%). The ability to attract talent into the L&D field remains the same, with 54% (+4%) saying this won't change. Interestingly, confidence in the quality of external L&D provision remains extremely high, as almost 90% of respondents say this is better now than it was in the previous six months. However, the extent of external L&D provision has continued to drop, with 20% (+3%) reporting that this will continue to gradually decline over the coming six months.

These results provide an indication that the UK's senior L&D community feels that their function's ability to meet learning needs has noticeably improved. It is also apparent that the function believes that its strategic position and contribution to corporate performance have also been maintained. UK L&D has faced considerable pressure in recent years to raise its game in response to the global economic downturn and support the changing needs of organisations. By focusing on implementing learning services which help organisations meet the challenges of this recession, is L&D now able to claim a place as a true strategic partner and a driver of business recovery?

To answer this question accurately, it is important to consider this positive outlook from L&D's own perspective in relation to the wider views of senior business leaders. Do senior decision makers and other key stakeholders hold similar opinions about L&D's ability to drive business recovery? A report by Capita Learning has found that less than a fifth of UK business leaders feel that their L&D function's strategy and methods of delivery are aligned with their organisation's operational strategy.⁷ Furthermore, almost half of the senior leaders who participated in the research said that they were doubtful of their L&D function's ability to provide the necessary support needed to drive business recovery. These findings are echoed by a similar study recently conducted by the Corporate Leadership Council.⁸ This found that fewer than 25% of key stakeholders were satisfied with training courses. Furthermore, only 25% said that L&D had actually helped to achieve business outcomes.

These findings are in sharp contrast to L&D's own perspectives about its ability to drive performance and its value to the business as a whole. As Charles Jennings, who is senior director at the Internet Time Alliance and MD of Duntroon Associates explains: *"If L&D doesn't adapt and adopt, I really fear the worst. If it does, though, there are huge opportunities. New ways of working are emerging all the time, such as bringing your own device."*⁹ As the UK Learning Trends data has consistently shown, the role of L&D is indeed evolving as the function gradually embraces technology as well as informal and social forms of learning.

These findings point to a potential conflict between L&D's internal opinion about its performance and status, compared to the views from across the wider business. Although the results from this latest survey highlight improved optimism about the function's status and performance from the senior L&D community, it is important to consider what evidence opinion is based upon in your organisation. It is essential for L&D functions to determine how well they are performing from the perspectives of key stakeholders and consumers of learning, and to develop methods to do this effectively.

⁷ Capita Learning and Development, 'Learning to Change' research report, May 2012. Executive summary available at: www.capita-ld.co.uk/Downloads/Learning_to_Change.pdf (accessed August 2012).

⁸ Corporate Leadership Council, 'Improving the impact of the L&D function on business outcomes' research study, 2011. Available at: www.executiveboard.com/exbd-resources/pdf/human-resources/learning-development/Improve-the-Impact-of-the-LD-Function-on-Business-Outcomes.pdf (accessed August 2012).

⁹ Charles Jennings, quoted in 'Adjust or become deadweight, L&D professionals warned,' Seun Robert-Edomi, www.trainingjournal.com 26 July 2012, available at: <http://www.trainingjournal.com/news/articles-news-adjust-or-become-deadweight-ld-professionals-warned/> (accessed August 2012).

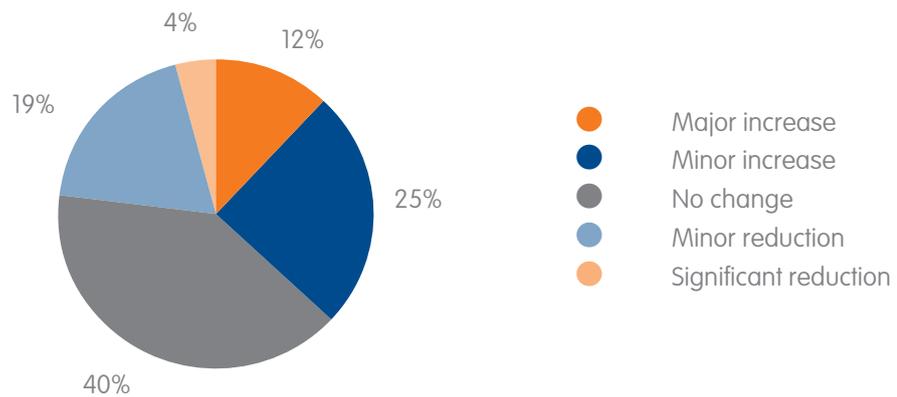
4.2 Responses to Question 2

Question 2 asked respondents to indicate the impact that the economy will have on their learning function in the coming six months (June 2012 to November 2012) in relation to 12 topics. ¹⁰

4.2.1 Emphasis on learning

Figure 8 below looks at the impact that the economy has had upon learning. 37% of senior Learning Managers say that overall emphasis on learning has increased. This is an increase of 12% on the previous survey figure. 40% say there has been no change in this area and 23% say that the emphasis on learning has reduced.

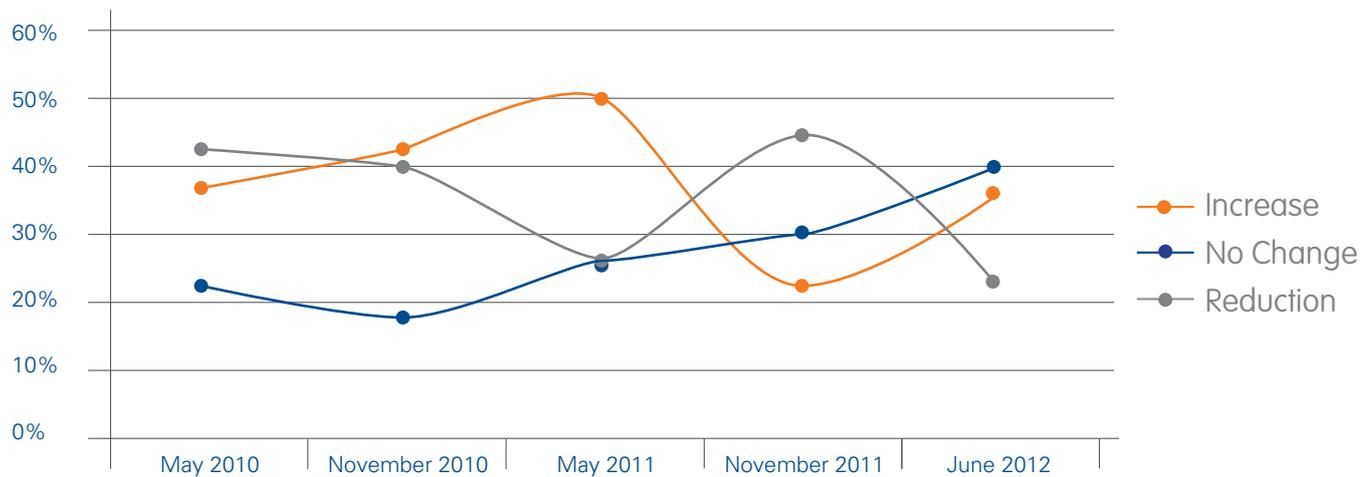
Figure 8: Emphasis on learning (June 2012)



¹⁰ Full details of all the responses to Question 2 can be found in Appendix 1.

When the latest set of results for emphasis on learning are considered against the previous survey data, it is clear that they represent a small but noticeable improvement over time. As shown by Figure 9 below, the picture has changed since November 2011. At that time, more than 45% of respondents felt that emphasis on learning had reduced, and 25% said it had increased. By May 2012, this situation has almost become reversed, as 37% of Learning Managers now tell us that emphasis on learning has increased (+12%), while 23% (-22%) say it has reduced. This can perhaps be linked to L&D's improved position as a strategic contributor to the business as well as its renewed ability to meet learning needs.

Figure 9: Emphasis on learning overview



Organisations are now acutely aware of the need to develop and invest in key people in order to grow. For many L&D departments, this has led to a real sea change in the way they plan, structure and organise learning activity. Not only is L&D now more closely connected to organisational strategy, as a result, activity is now being targeted on the key groups of people who are strategically critical to business success. These are discussed in more detail in section 4.4.2. This fundamental change can partly explain why learning activity, and indeed, those responsible for developing and delivering learning are seeing a renewed emphasis. Emphasis on learning has undergone a noticeable increase since the last survey, and it will be interesting to continue to track the development of this key area in forthcoming editions of the *UK Learning Trends Index*.

4.2.2 Shift to using technology

Figure 10 below shows the latest set of results regarding the perceived shift towards using technology to deliver learning. As with previous surveys, opinion remains highly positive, with 76% of respondents saying that this will increase in the coming six months. 20% predict no real shift and only 4% say there will be a reduction in their use of technology.

Figure 10: Shift to using technology (June 2012)

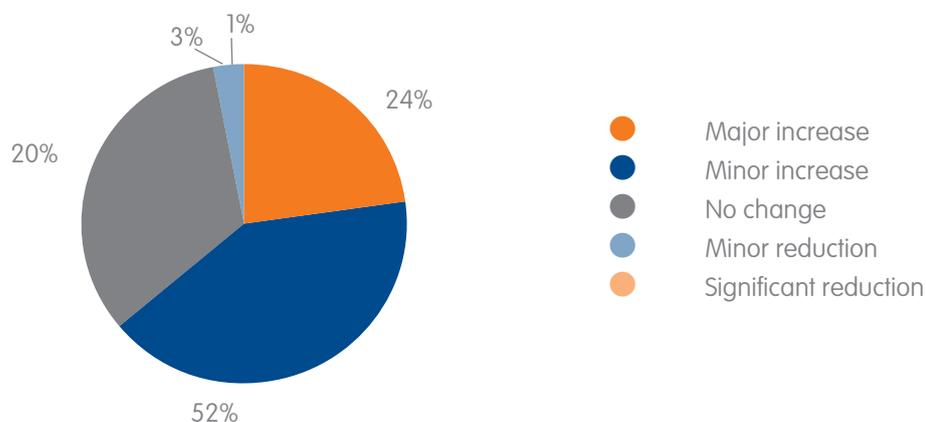
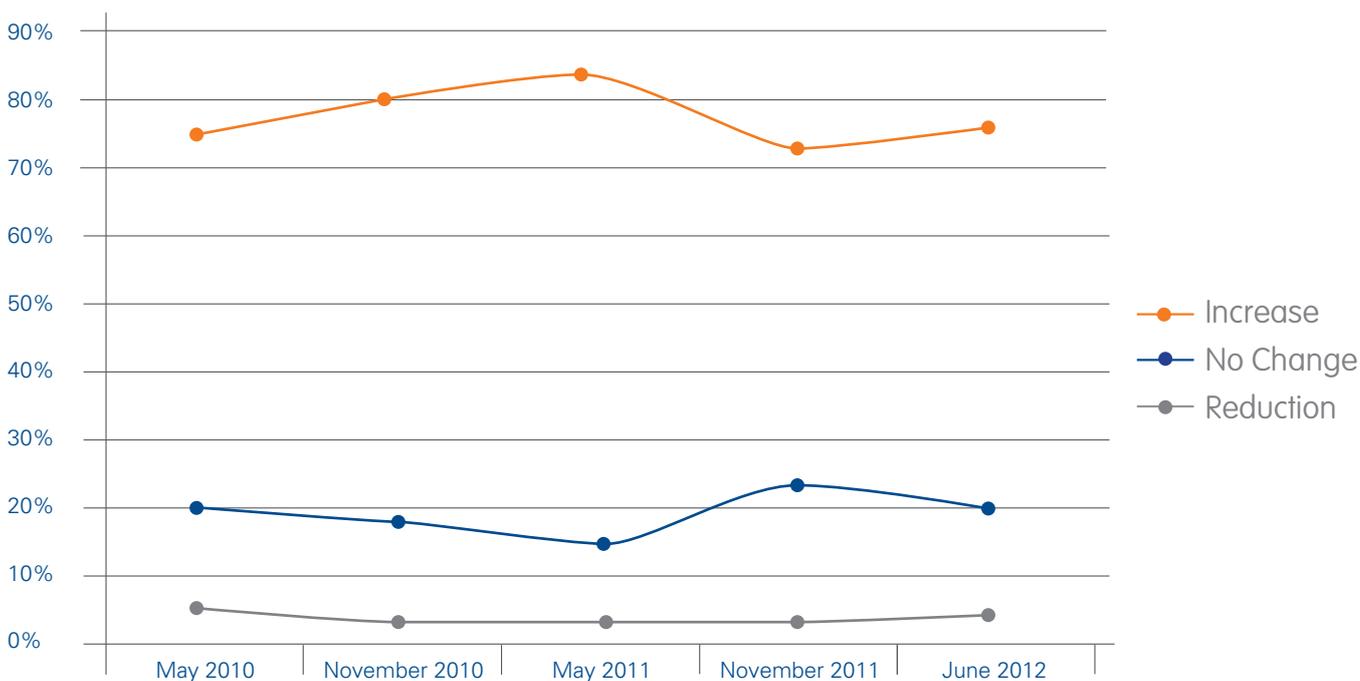


Figure 11 below considers the responses received to this question across all five surveys. Since the *UK Learning Trends Index* began in May 2010, respondents have told us that their organisation will undergo a strong shift towards using technology to deliver learning. As shown by the orange line on the graph below, the percentage of senior Learning Managers who predict that their use of technology will increase has never dropped below 70%. Conversely, those telling us that their use of technology is set to decline (see grey line) have remained consistently low at below 5%.

Figure 11: Shift to using technology overview



4.2.3 Reliance upon informal learning

Figure 12 below looks at the latest responses on informal learning. 60% of senior Learning Managers say that their reliance on informal learning will increase in the coming six months (47% predict that this will be a minor increase, and 13% say it will be a major increase). 38% feel there will be no discernible change in this area, and only 2% say their reliance on informal learning will diminish.

Figure 12: Reliance on informal learning (June 2012)

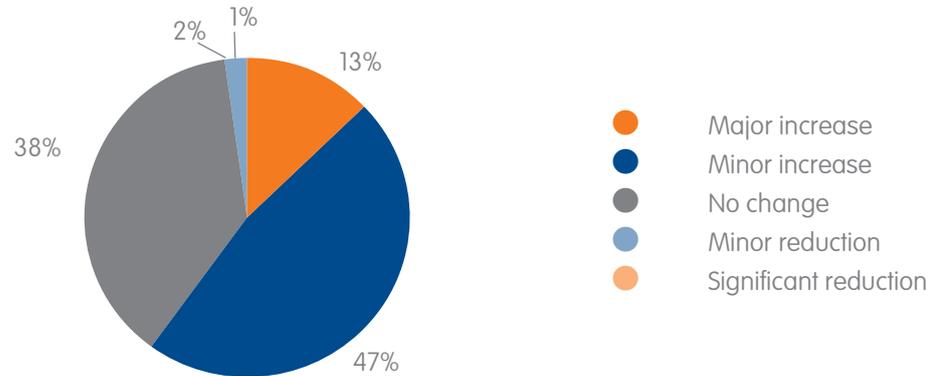
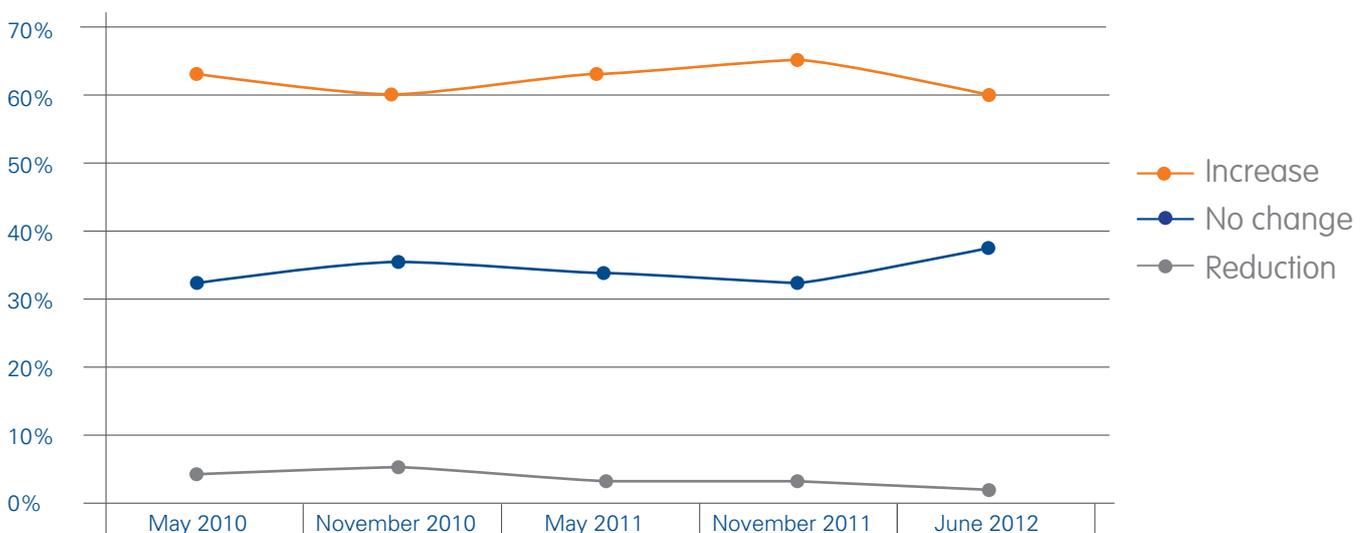


Figure 13 below shows the range of responses to this question across all five surveys. Since the survey began in May 2010, respondents have consistently told us that their reliance upon informal learning will increase. Indeed, the figure has never dropped below 60% (refer to the orange line on the chart below). Very few Learning Managers say that their reliance on informal will reduce. As shown by the grey line on the chart below this has never risen above 5%. This is discussed further in section 4.4.3.

Figure 13: Reliance on informal learning overview



4.3 Responses to Question 3

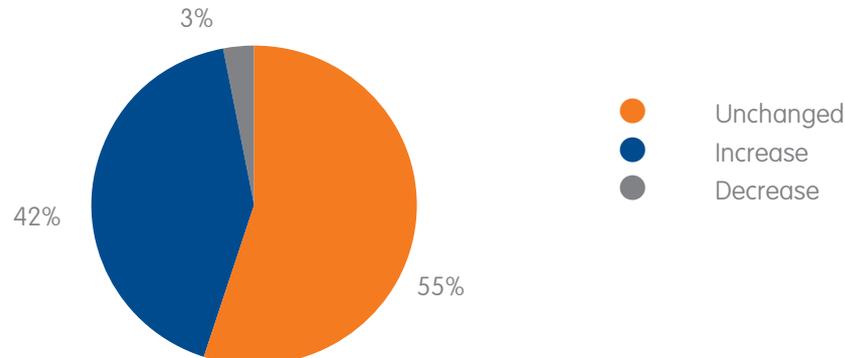
Question 3 asked respondents to consider their budget spending over the next six months (from June 2012 to November 2012) in relation to eight areas.¹¹

4.3.1 Spending on informal learning support

As shown in Figure 14 below, L&D's spending on support for informal learning continues to be positive. 42% of our respondents say that spending in this area is likely to increase in the coming six months, 55% say it will remain unchanged and only 3% predict that spending on informal learning will fall. This is further evidence of the strong support that exists in relation to informal learning from the senior L&D community.

Recent research conducted by GoodPractice also points to the importance of continuing to invest in informal learning, but from the employee (rather than a senior L&D) perspective. *The Learning Habits of Leaders and Managers* research report revealed that when they are faced with a new or difficult challenge at work, leaders and managers demonstrate a strong preference for informal learning and social support.¹² Activities such as face-to-face or telephone discussions with peers, more senior managers and subject matter experts were the most popular choices in times of need. Employees also spoke highly of a variety of social learning methods such as peer-to-peer coaching, on-the-job learning and tapping into informal hubs of expertise in order to share experience and highlight best practice.

Figure 14: Spending on informal learning support (June 2012)

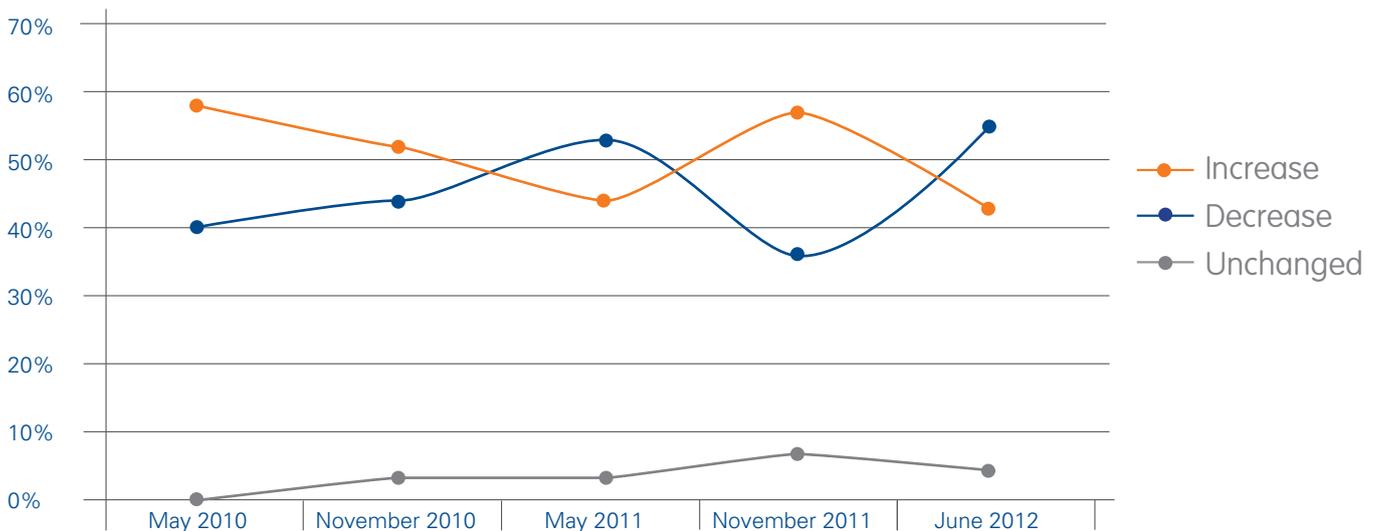


¹¹ Full details of all the responses to Question 3 can be found in Appendix 1.

¹² Stef Scott, 'The Learning Habits of Leaders and Managers', GoodPractice Insights, June 2012. Available at: <http://goodpractice.com/blog/resources/discover-the-learning-habits-of-leaders-and-managers/>.

Figure 15 below considers the overall trend in L&D spending on informal learning support since May 2010. As indicated by the blue line on the chart below (which represents the respondents who say that their informal learning spend will increase) it can be seen that financial support for informal learning has consistently increased over the period of *UK Learning Trends Index* data. Between 45 and 60% of respondents to each survey tell us that their spending in this area is likely to increase over time. Those predicting a decrease in informal learning spending have remained consistently low at less than 5% since the survey began in May 2010.

Figure 15: Spending on informal learning support overview



We asked Jay Cross, CEO of the Internet Time Alliance to comment on these particular findings. He said that when it comes to spending on support for informal learning, it is important to remember that: *“Statistics on informal learning are tricky. L&D can only describe what they’re aware of, and in many organisations, informal learning goes on despite the training organisation, not because of it. The major cost is the time of the people involved, and nobody is counting that. The infrastructure that supports informal learning (social networks, meeting rooms, telephones etc) is already in place, so informal learning’s share of the bill is not reported. The pity is that items in business that don’t cost anything are deemed unimportant. Were companies to see the real costs of informal learning, they probably wouldn’t leave it to chance.”*

4.3.2 Spending on technology-based learning

Figure 16 below demonstrates that the impact of technology-based learning initiatives (such as e-learning programme development) continues to be significant. The latest results are broadly consistent with the previous survey, with 64% predicting that spending in this area will continue to rise in the next six months. 33% predict no real change in terms of spending in this area, and only 3% think it will decrease in the coming months.

Figure 16: Spending on technology-based learning (June 2012)

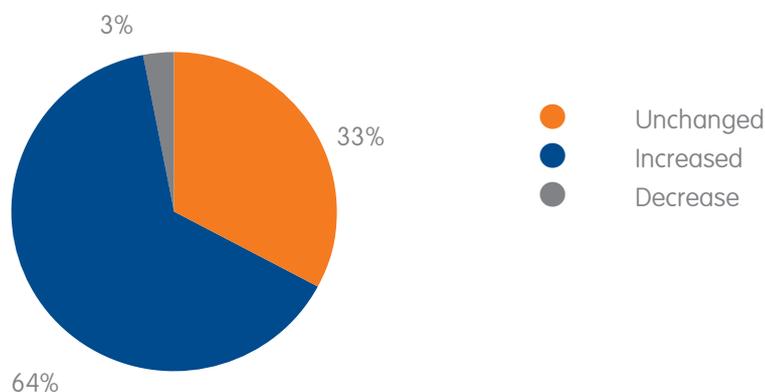
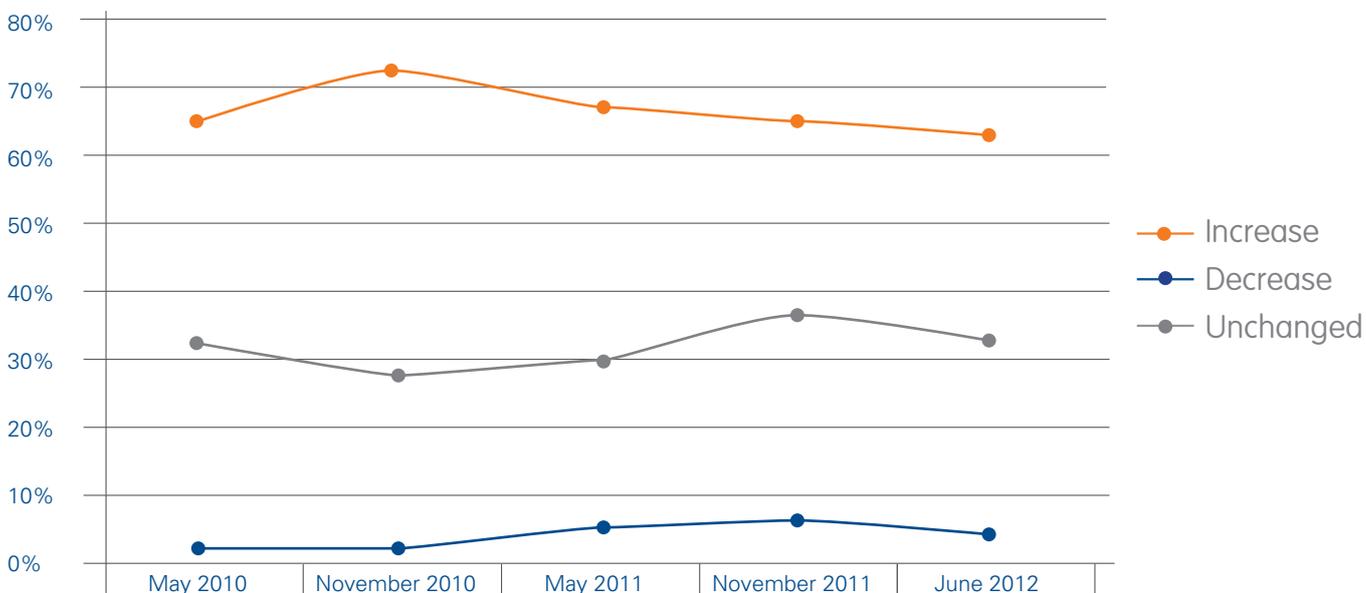


Figure 17 below looks at how spending on technology-based learning has changed since the first *UK Learning Trends Index* data was recorded in May 2010. It can be seen that spending on technology-based learning has risen over the period. Between 60 and 70% of respondents to each survey tell us that they plan to increase spending in this area, around 30% say it won't change and less than 5% say it will decrease.

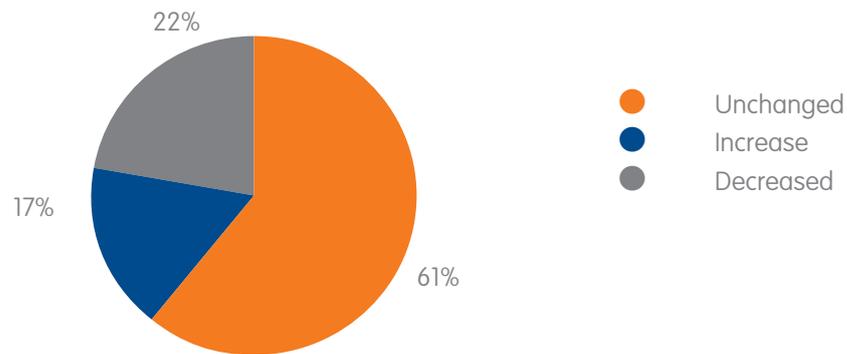
Figure 17: Spending on technology-based learning (June 2012)



4.3.3 Spending on external coaching

Figure 18 below considers L&D spending on external coaching, which is generally a specialist, and therefore costly, activity. In this survey, 61% of senior Learning Managers told us that their spending in this area would not change, whereas 17% felt it would increase and 22% said it would decrease. These results are broadly consistent with the finding from previous surveys, with a slight increase in the number of respondents predicting that there will be no real change in spending in this area (+11%).

Figure 18: Spending on external coaching (June 2012)



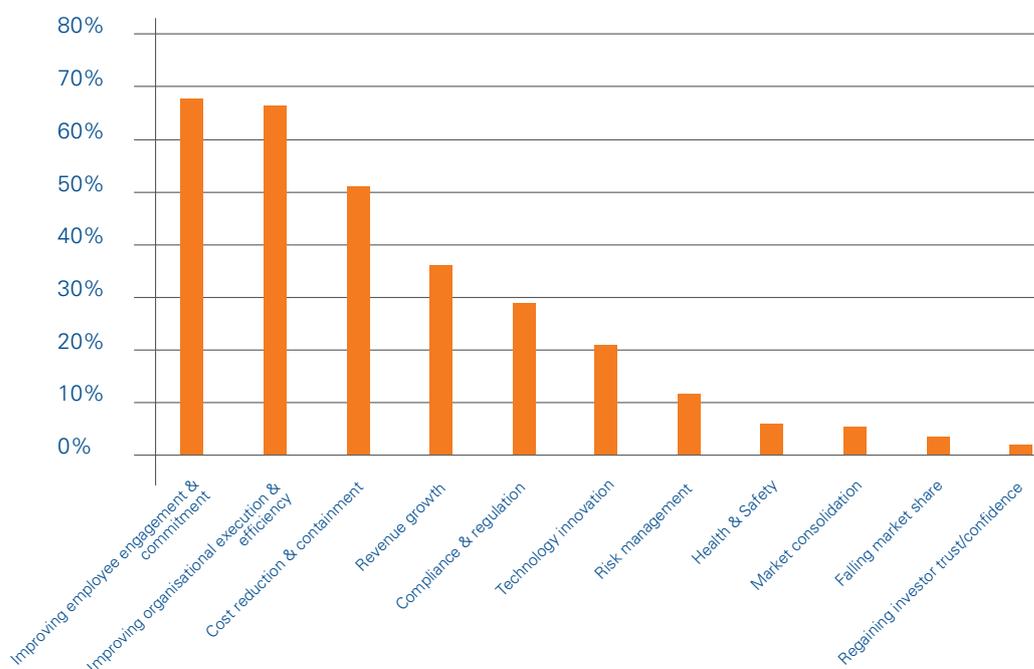
4.4 Responses to Question 4

Question 4 asked respondents to rank the key business drivers and key areas of focus for their L&D function. We also asked two new questions to gauge current levels of support for informal learning strategies and mobile learning.¹³

4.4.1 Key business drivers

We asked senior Learning Managers to identify and rank the top three business drivers they felt would impact most strongly upon with L&D function in the coming six months. As shown in Figure 19 below, the latest results demonstrate that at 68%, **improving employee engagement and commitment** has moved into first place for the first time since the *UK Learning Trends Survey* began (+5%). This is now ranked just ahead of the previous top business driver, **improving organisational execution and efficiency** at 67% (0% - no change since the last survey). Although improving organisational efficiency continues to be of critical importance, employee engagement is now just as important in terms of overall L&D priority.

Figure 19: Key business drivers (June 2012)



In the latest survey, cost reduction and containment has moved above revenue growth as the third most important driver for L&D at 51% (+7%). Maintaining revenue growth is still important, and is ranked in fourth place at 36%. This represents a drop of around 12% on the previous survey figure.

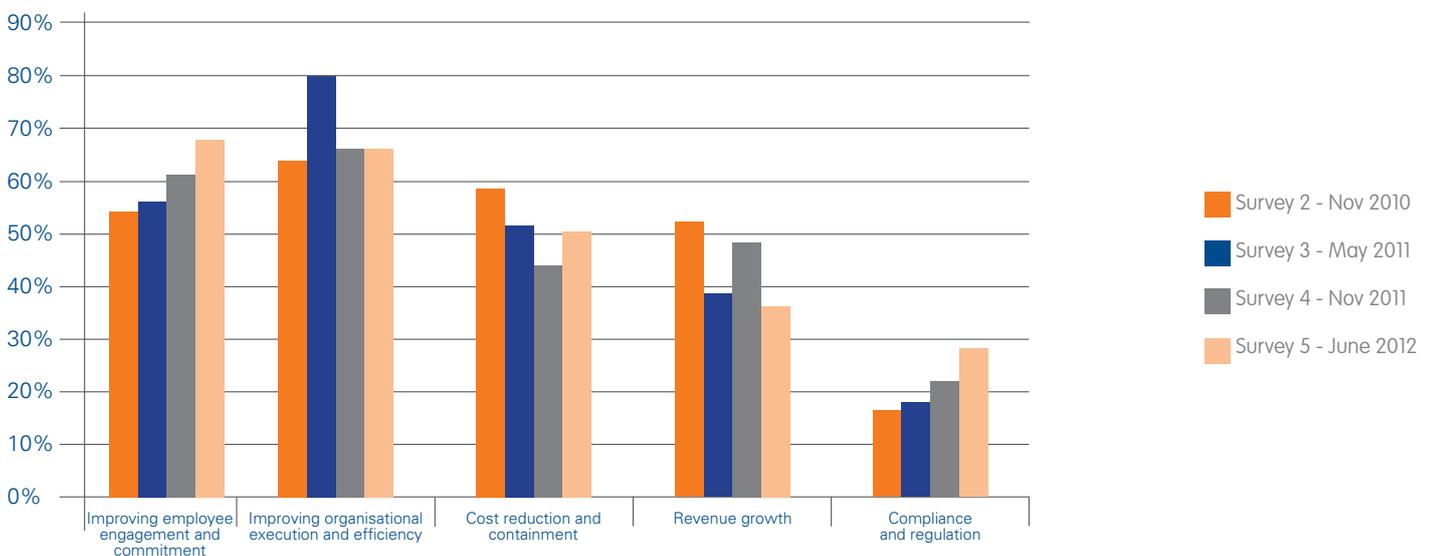
At the other end of the spectrum, issues such as regaining investor trust and confidence, falling market share, market consolidation and Health and Safety all continue to be ranked as very low priorities by Learning Managers. This is true for both large and small organisations.

¹³ Full details of all the responses to Question 4 can be found in Appendix 1.

Figure 20 below shows how the top business drivers for L&D have changed in terms of priority across the duration of surveys 2 to 5. Since November 2010 improving employee engagement and commitment has consistently risen in importance (from 55% in November 2010 to 68% in May 2012). This demonstrates that keeping employees engaged and motivated to perform in difficult times has become increasingly important for UK L&D practitioners.

Improving organisational execution and efficiency has consistently been ranked highest, peaking at 80% in the second survey in May 2011. Cost reduction and containment has seen a gradual overall decline in relative importance, as has maintaining revenue growth, which has dropped to 36% in this survey. Interestingly, compliance and regulation has remained in fifth place since we first began to gather data about key business drivers in November 2010. However, it has gradually risen in importance since November 2010, rising from 15% to almost 30%.

Figure 20: Top business drivers overview



4.4.2 Key areas of focus

When the results from the fifth survey are ranked as shown in Figure 21 below, it is clear that leadership development has maintained its position at the very top of the UK L&D agenda. The current figure is 53%, which is an increase of 8% on the previous survey figure. The top five areas of focus for L&D are identified as follows:

Figure 21 - Top five areas of focus for L&D

| | |
|------------------------------------|-----|
| 1. Leadership development | 53% |
| 2. Management performance | 31% |
| 3. Talent management and retention | 31% |
| 4. Industry specific skills | 29% |
| 5. Performance management | 28% |

Although there is still a significant gap (>20%) between leadership development and the other key areas listed in the top five, as the above table shows, the relative difference in overall priority between the next four areas is negligible (+/-4%). It could therefore be argued that although the focus on leadership development remains critical, L&D has witnessed something of a broadening of its overall remit, with an equal focus on management performance, wider talent management and retention activity, development of industry specific skills and performance management of the workforce.

Figure 22: Key areas of focus for L&D (June 2012)

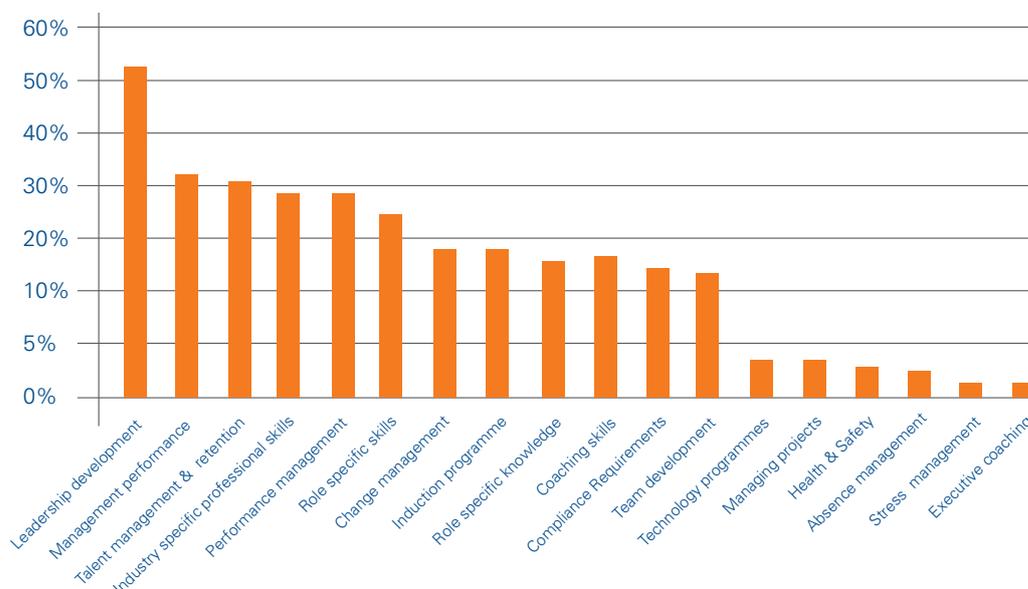
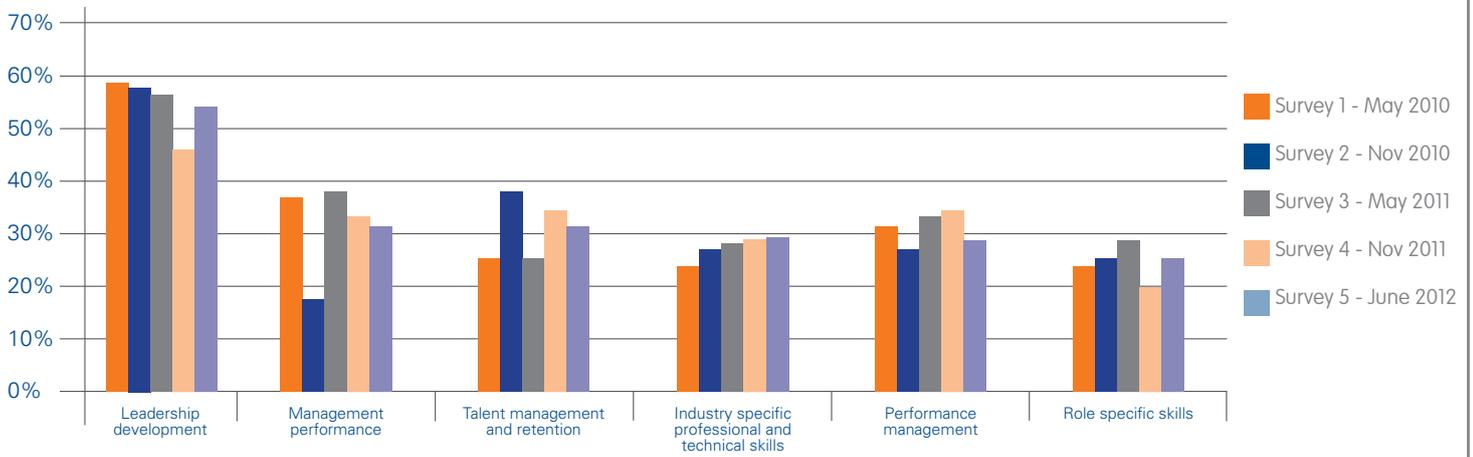


Figure 23 below considers the key areas of L&D focus in more detail of the period of all five surveys from May 2010 to June 2012.

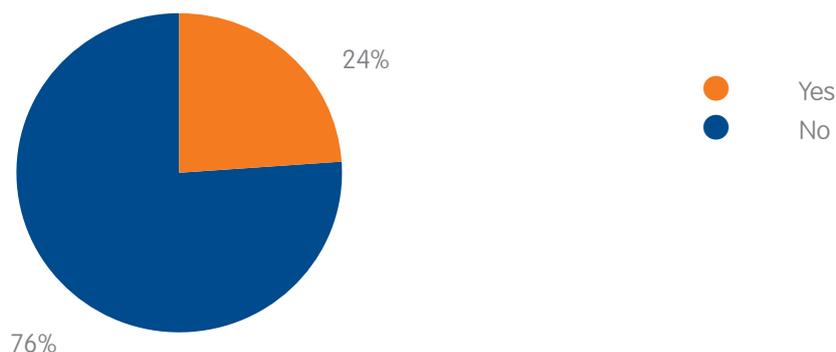
Figure 23: Key areas of focus for L&D overview



4.4.3 Hot topic 1 – informal learning strategy

In this survey we asked respondents to comment on two new topics of particular interest. The first hot topic asked senior Learning Managers whether their organisation had a specific, agreed strategy for informal learning. The results are shown in Figure 24 below. 24% (approximately one quarter of the survey sample) of respondents said that their organisation did have a specific strategy which looked at informal learning, while 76% (approximately three quarters of the survey sample) said they did not.

Figure 24: We have a specific, agreed strategy for informal learning (June 2012)



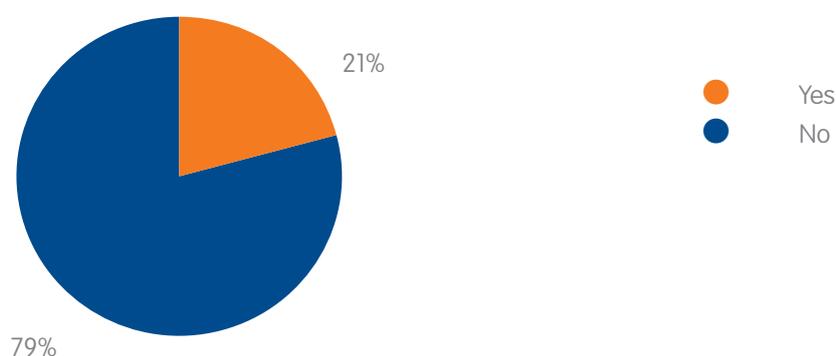
These results are interesting when compared against the previous data we have collected about informal learning. As covered in section 4.2.3, reliance upon informal learning has remained consistently high. In each survey to date, around 70% of senior Learning Managers tell us that their reliance on informal learning will increase. Yet, only a quarter say that they have a specific strategy to address informal learning within their organisation. It is clear from the commentary on UK L&D issues that informal learning is one of the most important issues to emerge in recent years.

Yet, despite L&D's recognition of its importance within the learning mix, efforts to understand, support and optimise informal learning as part of the wider organisational learning strategy remain low. One reason for this may be that responsibility for leveraging and supporting informal learning does not sit squarely with L&D; indeed, many other parts of the business need to be involved to ensure effectiveness. Also, there have been many reports recently about the importance of not actively 'managing' informal learning. This may be something of a paradox, as although it makes sense not to put too many constraints around informal learning and to let it develop organically, to achieve the best possible results, L&D needs to work at creating the right organisational culture and working conditions for it to flourish. Examples of best practice also need to be highlighted and championed.

4.4.4 Hot topic 2 – mobile learning

The second hot topic question asked survey respondents to tell us whether they have launched or trialled a mobile learning initiative in the last six months, i.e. a learning or performance support tool delivered via a handheld device. As shown in Figure 25 below, 21% (just under a quarter) of the survey sample said they had recently introduced or trialled a mobile learning initiative, while 79% (more than three quarters) of the survey sample said they had not. These findings are in line with the latest research in this area, which suggests that mobile learning is off to a slow start for many organisations. For example, the *Mobile Learning: Delivering Learning in a Connected World* whitepaper from the American Society for Training and Development notes that only 28% of organisations provide access to internal learning content via a mobile device.¹⁴

Figure 25: We have recently launched or trialled a mobile learning initiative (June 2012)



It is interesting to compare this information in relation to the data we have collected about attitudes towards using technology to deliver learning. As highlighted earlier in section 4.2.2 Learning Managers have consistently told us about a positive shift towards using technology as a learning delivery medium. This has remained the case with each edition of the *UK Learning Trends Survey*, and remains high at around 70% since May 2010.

At the moment, mobile learning is one of the most talked about subjects within the UK L&D arena. Commentary and debate on it has dominated the L&D landscape for some time. For example, in early 2011, the article *Mobile Learning: The Next Evolution* was published.¹⁵ It argued that mobile learning can no longer be considered as a fad or something that only a few organisations with large training budgets and access to sophisticated technologies can hope to implement.

¹⁴ ASTD Whitepaper, 'Mobile learning: Delivering Learning in a Connected World' Volume 4, No 1, 2012, available at: www.astd.org/Publications/Research-Reports/2012-Mobile-Learning-Delivering-Learning-in-a-Connected-World (accessed August 2012).

¹⁵ Billy Biggs and Rob Justice, 'Mobile Learning: The Next Evolution', 12 April 2011, Chief Learning Officer. Available at: <http://clomedia.com/articles/view/mobile-learning-the-next-evolution>.

However, according to Gary Woodill, author of *The Mobile Learning Edge: Tools and Technologies for Developing Your Teams*, there are three main challenges that organisations face when it comes to implementing mobile learning successfully: ¹⁶

1. Lack of expertise. Anecdotal feedback from our experience of working with client organisations who wish to introduce a mobile learning solution or support application is that most have limited experience of it, and don't know where to begin. The majority don't have internal expertise in key areas such as mobile instructional design, and how effective learning can be encouraged both formally and informally via mobile devices.

2. Lack of awareness. This relates to issues around creating a strong **business case** for mobile learning. Many organisations are keen to adopt some form of mobile delivery as part of their learning mix, but the challenge is to understand exactly where and how mobile learning can provide the most benefit to your organisation. Before embarking on any mobile learning initiative, it is important to understand how it will fit into and complement existing methods of learning delivery.

3. Conflicting accountabilities and responsibilities. GoodPractice has also found, on occasion, that mobile learning initiatives fail to get off the ground as a consequence of differing agendas and priorities amongst key stakeholders. An effective mobile solution requires buy-in and co-operation not only from L&D and senior management, but also from key IT representatives.

4.4.5 The implications for L&D

Research evidence suggests that the benefits to be gained from mobile learning can only complement and enhance an organisation's existing learning provision. For example, the *Mobile Learning: Delivering Learning in a Connected World* *whitepaper* from ASTD reports that mobile learning significantly enhances the learning function through **just-in-time performance support**. More than half of all respondents to the ASTD survey said that mobile learning will significantly improve learning in their organisation in the next three years.

Furthermore, research also demonstrates that mobile learning is at its most effective when it is used to support **informal** and **social** forms of learning. For example, research from eLearnity, a leading European learning and talent analyst consultancy, suggests that: "*Mobile devices are ideal for immediately sharing knowledge and experience that occur on the job. The immediacy of being able to share and access mobile learning means that all those 'light bulb; moments can be shared.'*"¹⁷

Given the effectiveness of mobile learning in supporting informal learning, a key question for L&D is whether the function is doing enough to support and leverage informal learning through the use of mobile technologies. Evidence would suggest that this is perhaps one of the most valuable, yet underutilised, ways in which technology can be used to support informal learning. However, this may be one way to address some of the questions that exist around how best to develop an effective informal learning strategy, as outlined in Section 4.4.3.

¹⁶ Gary Woodill, *The Mobile Learning Edge: Tools and Technologies for Developing Your Teams* (McGraw Hill, September 2011). You can find out more about this book at: www.mobilelearningedge.com.

¹⁷ 'Mobile Learning: All Talk?' Elearnity, December 2011. Available at: <http://www.elearnity.com/ekcmobilelearning.html> (accessed August 2012).

5. International Perspectives on L&D

5.1 How does the UK Learning Trends survey compare at an international level?

The *UK Learning Trends Index* is based on a similar survey which was originally developed by the ASTD. Run on a quarterly basis since 2008, the *Learning Executive Confidence Index* (LXCI) assesses the expectations and forecasts of learning executives across a number of key learning and development indices.¹⁸

This section considers the most recent LXCI report and how its key findings broadly compare with *UK Learning Trends Index* data. As the *UK Learning Trends survey* is intended to be a study of the UK's L&D landscape, each of the five surveys conducted to date have consistently excluded any data received from non-UK based respondents. Generally, the number of responses from non-UK based sources has been too small to offer a worthwhile comparison.

However, the ASTD's LXCI provides a direct comparator. Published in July 2012 and drawn from a database of international L&D respondents, the latest LXCI report is based on responses from 237 senior learning executives.¹⁹ By comparison, the latest *UK Learning Trends Index* findings are based on a refined sample size of 218 respondents, as reported in June 2012. Both reports use similar methodologies and data analysis techniques.

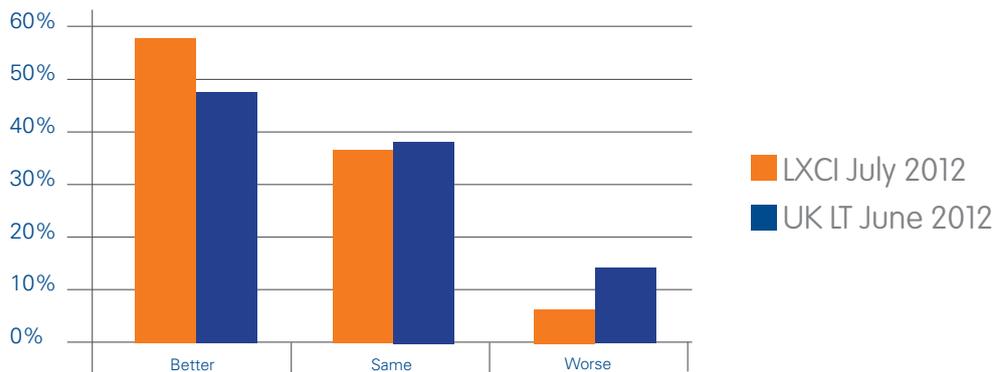
¹⁸ The latest Learning Executive Confidence Index (LXCI) report from the ASTD is available to download at www.astd.org/Home/Publications/Research-Reports.aspx (accessed August 2012).

¹⁹ The latest Learning Executive Confidence Index (LXCI) report from the ASTD is available to download at www.astd.org/Home/Publications/Research-Reports.aspx (accessed August 2012).

5.1.1 Ability to meet learning needs comparison

Figure 26 below considers the responses received from both surveys in relation to L&D's ability to meet learning needs in June and July 2012. Responses to this question can be interpreted as an indicator of current levels of confidence and optimism across the function as a whole. As shown by the blue columns, the majority of international LXCI respondents predict that their ability to meet learning needs will be 'better' in the coming months at 57%. 37% said it would stay the same and only 6% said it would be worse. As shown by the orange columns, these figures are broadly comparable with the latest *UK Learning Trends* data. 47% of UK respondents said that their ability to meet learning needs would be better (10% less), 38% said it would be the same (1% more) and 15% felt it would not change (+9% higher).

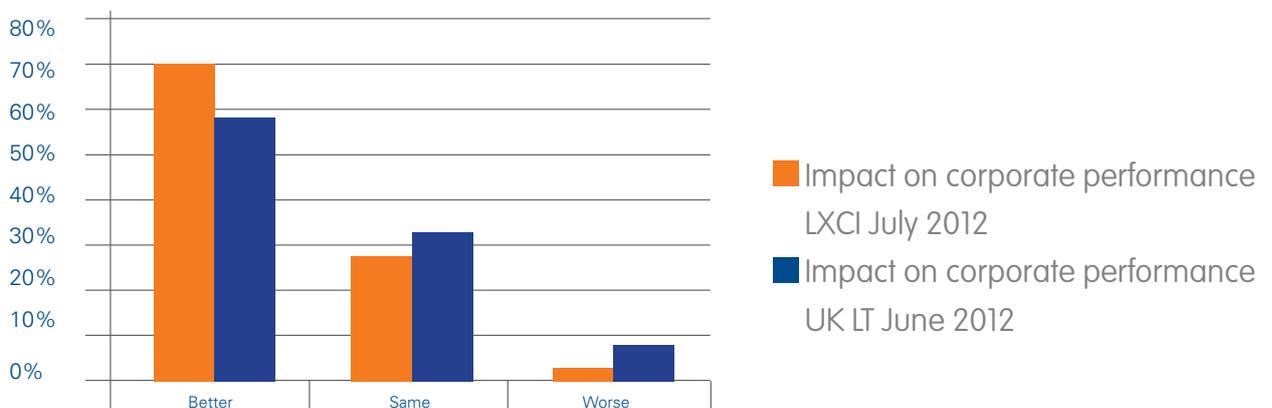
Figure 26: Ability to meet learning needs comparison



5.1.2 Impact on corporate performance comparison

Figure 27 below looks at how L&D's impact on corporate performance compares across the latest LXCI and *UK Learning Trends Index* surveys. Again, there is little discernable difference in international and UK based perceptions of L&D's performance in this key area. 70% of LXCI respondents said their impact on corporate performance would be 'better' in the next few months, compared to 59% of respondents to the UK survey. 28% said it will stay the same, compared to 34% in the UK, and only 2% said it would be worse, compared to 7% in the UK.

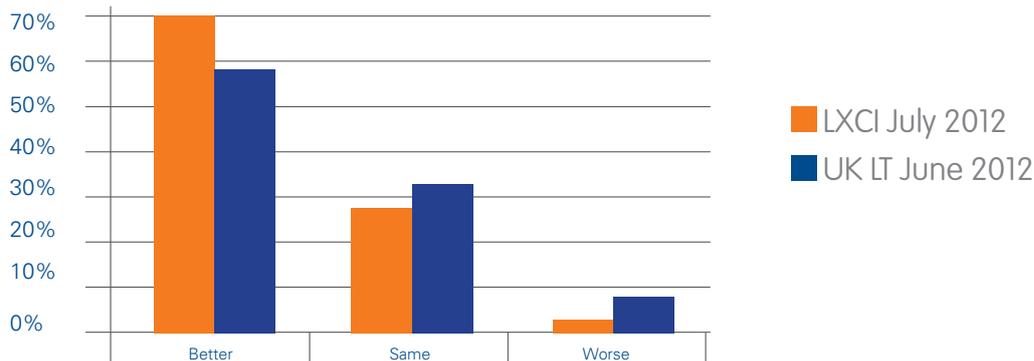
Figure 27: Impact on corporate performance comparison



5.1.3 Status as a key strategic contributor comparison

Status as a key strategic contributor is also a key indicator of the confidence of the L&D profession as a whole. As illustrated in Figure 28 below, UK based and international L&D respondents both remain cautiously confident about their function's ability to act as a true strategic partner. Indeed, UK L&D responses (shown in orange below) appear to be slightly less optimistic about this issue than their international counterparts. 66% of LXCI respondents feel that their status as a key strategic contributor will improve in the coming months, compared to 55% of *UK Learning Trends* respondents (+11% higher).

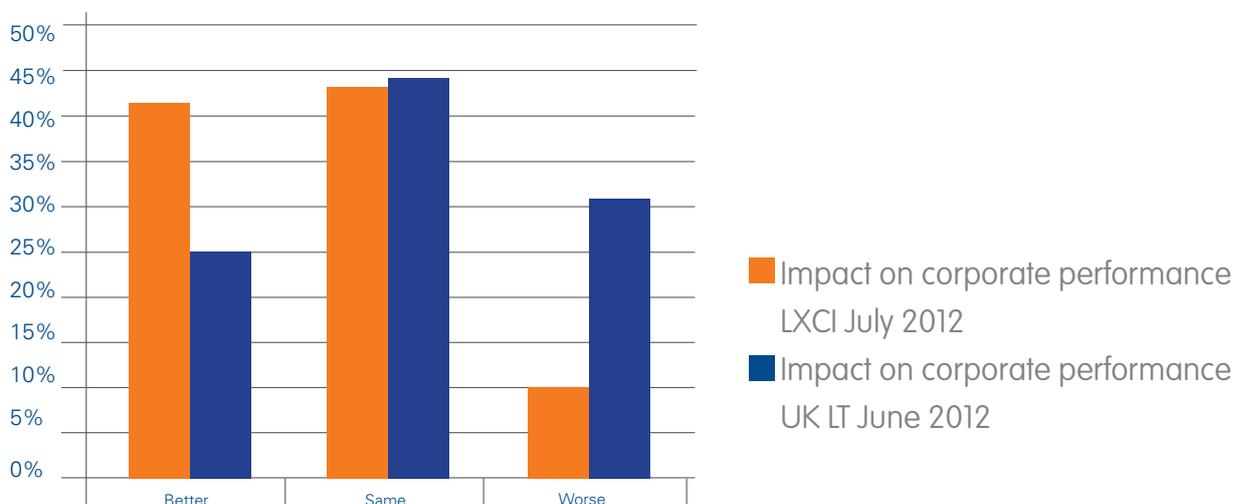
Figure 28: Status as key strategic contributor comparison



5.1.4 Availability of resources comparison

Figure 29 below looks at the picture for availability of resources to fund key L&D activities. The international position on this appears to be somewhat better than that in the UK. For example, 42% of LXCI respondents say that availability of resources will improve in the coming months, compared to only 25% of *UK Learning Trends* respondents (17% lower). As expected, this is accompanied by corresponding data from respondents who say that availability of resources will be worse – only 6% of LXCI respondents compared to 15% from the UK survey.

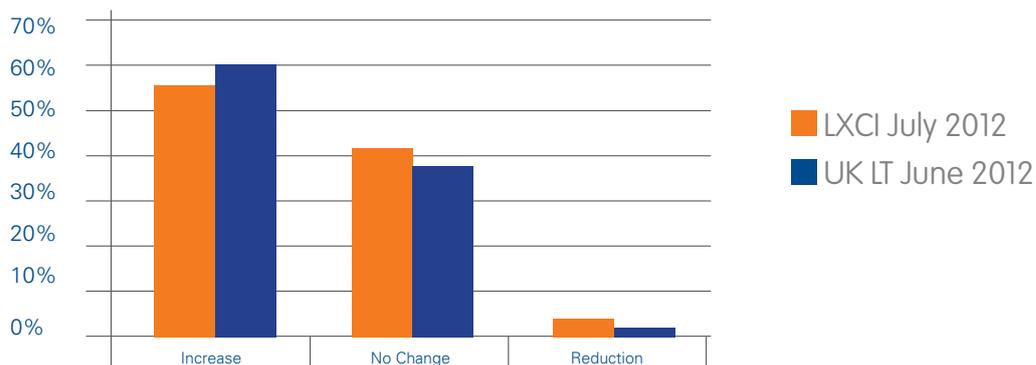
Figure 29: Availability of resources comparison



5.1.5 Reliance on informal learning comparison

Respondents to the UK survey have consistently told us that their reliance on informal learning will increase. There is little difference in the attitudes of international L&D executives towards informal learning, as LXCI results have also shown a consistent increase in this area. In the latest LXCI survey, 55% of senior learning managers said their reliance on informal learning would increase in the coming months, compared to 60% of UK respondents. As shown on the graph below, there is very little difference in the percentage of respondents saying that it would reduce or not change.

Figure 30: Reliance on informal learning comparison



6. End Notes

6.1 Next steps

The sixth *UK Learning Trends Index* will be launched in November 2012, with the results due to be published in January 2013. We will aim to continue collecting data from the senior UK L&D community and reporting upon the key findings and trends that emerge. The full survey report will be made available on our website and also via our survey partner websites www.reedlearning.co.uk and www.inlconsultancy.com.

If you are a senior L&D professional and would like to add your voice to future editions of the UK Learning Trends Index please email Louise Cameron at lcameron@goodpractice.com with your contact details. You may also be interested in joining our dedicated LinkedIn Group for L&D professionals. Please contact Louise Cameron for further details.

6.2 About GoodPractice

GoodPractice develops and delivers high quality content designed to improve the performance of leaders and managers. Over one million people in more than 200 companies, public bodies and learning organisations are using GoodPractice to make the most of their skills and talents. Improving your leaders and managers isn't just good for business, it's essential. Our business is about helping you make that improvement. For more information on our solutions, visit www.goodpractice.com.

6.3 About Reed Learning

Reed Learning delivers short courses, professional qualifications, in-house programmes and outsourced training services. In the last 10 years we've trained over 250,000 people, including 20,000 new managers, 12,000 people who were scared of doing presentations, and 14,000 who needed to learn to prioritise. Our courses teach people to be more confident and capable, whether in presenting to a group, analysing a balance statement or deciphering a Google Analytics report.

People choose us for the widest choice for venues and dates, the largest pool of quality-assured trainers and guaranteed standards of training delivery. Our approach to learning extends beyond the classroom, with pre and post course skills audits, free refresher modules, action planning and eLearning at no extra cost.

Many of our courses have been accredited by leading professional and academic awarding bodies, including the Chartered Management Institute, the Institute of Sales & Marketing Management, the APM Group (PRINCE2®), IOSH and the Institute of Administrative Management.

6.4 About INL Consultancy

INL Consultancy service offers support to the total management of learning, to ensure intended change and improved performance. With over 40 experienced development experts worldwide, we work in partnership with clients to gain a thorough understanding of culture, climate and organisational intent. Working extensively with ASTD in the UK and other partner organisations, INL Consultancy will provide a range of accredited qualifications to suit you.

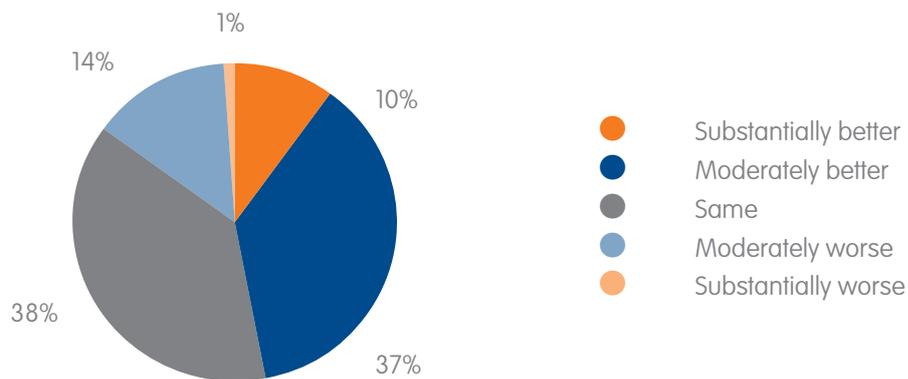


7. Appendices

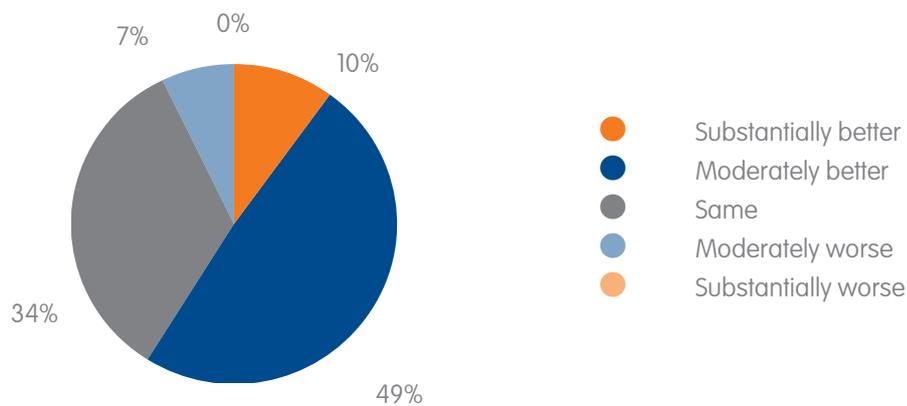
7.1 Appendix 1 – Full responses to survey questionnaire

Question 1: Please rate your expectations for the coming six months, from June 2012 to November 2012, in comparison to the previous six months for the following areas:

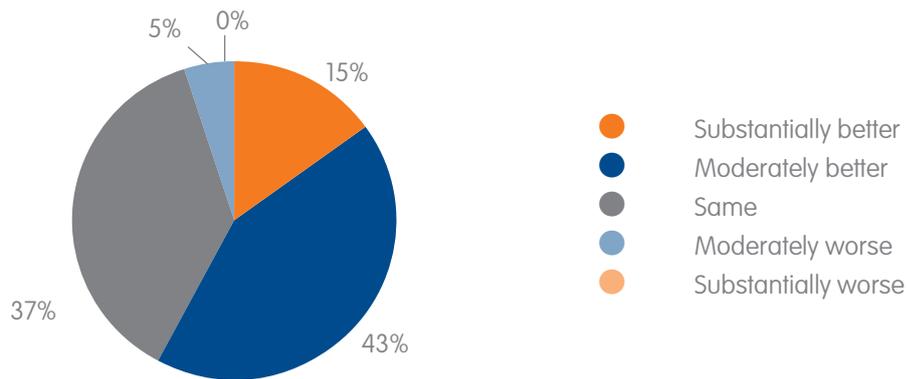
1. Your ability to meet learning needs



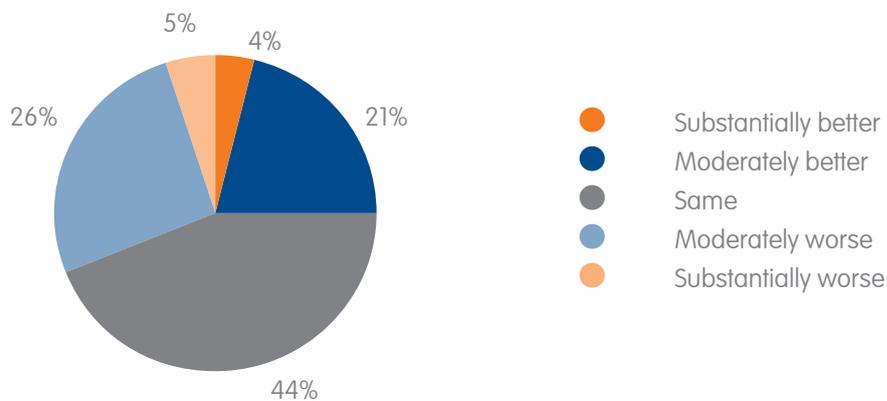
2. Your impact on corporate performance



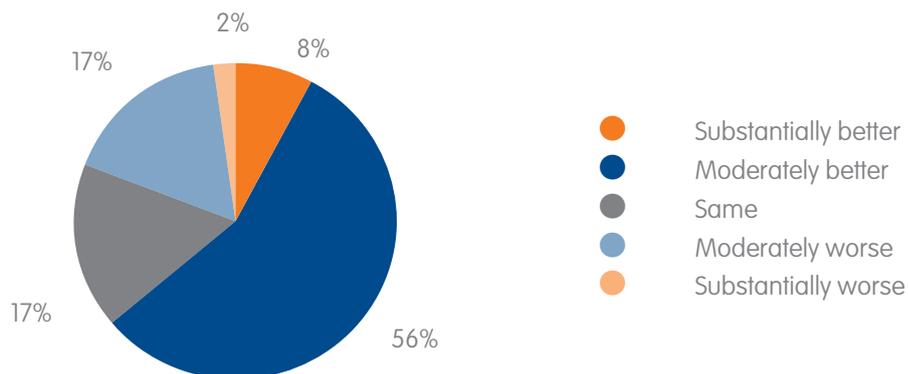
3. Your status as a key strategic contributor



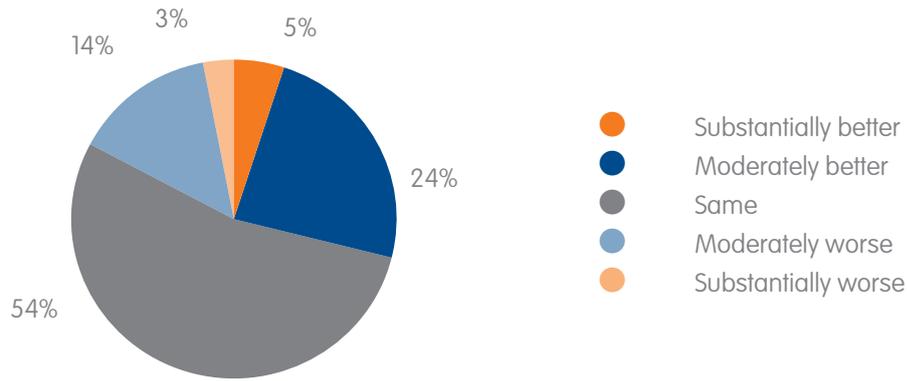
4. The availability of resources



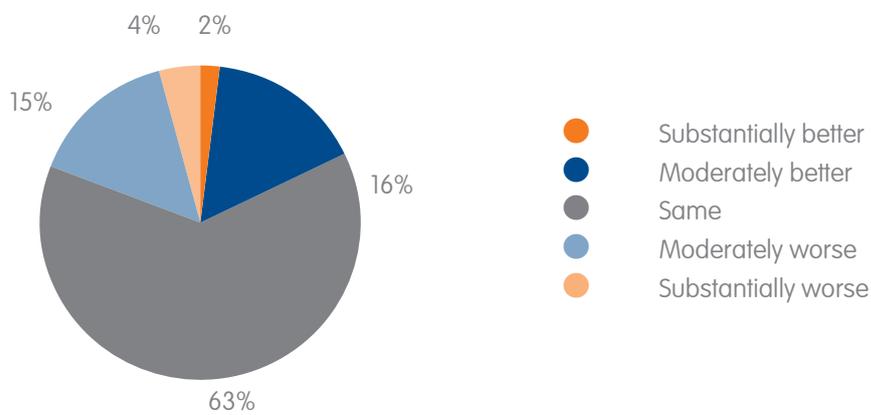
5. The status of the L&D profession



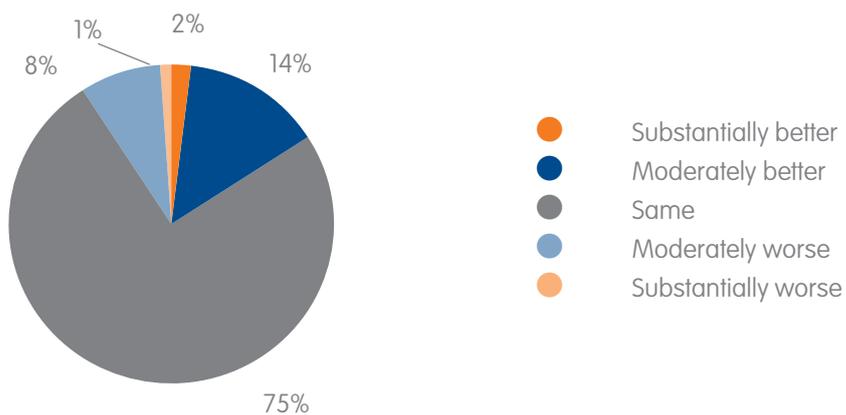
6. The ability to attract talent to your team



7. The extent of external provision and support

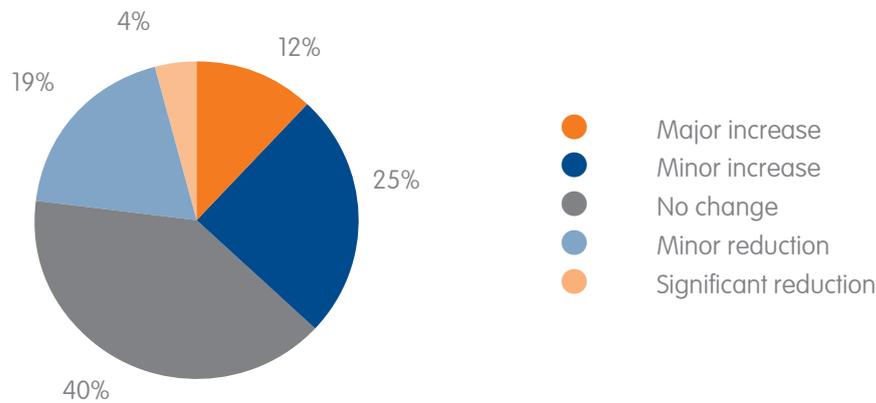


8. The quality of external provision

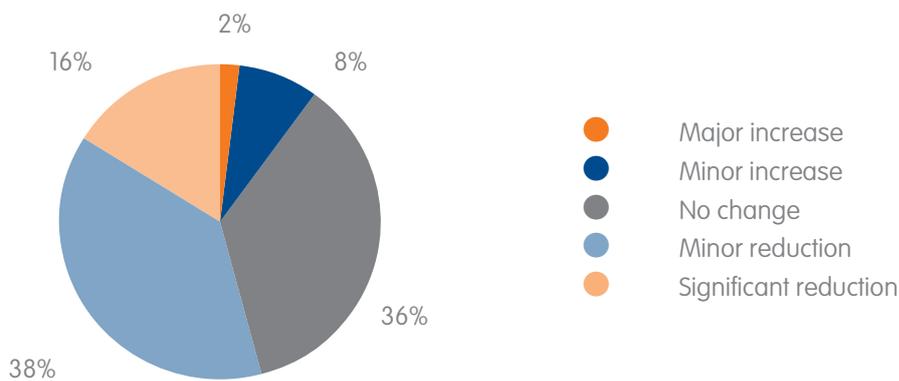


Question 2: For each of the following, please indicate what impact the economy will have on your learning function in the coming six months from June 2012 to November 2012.

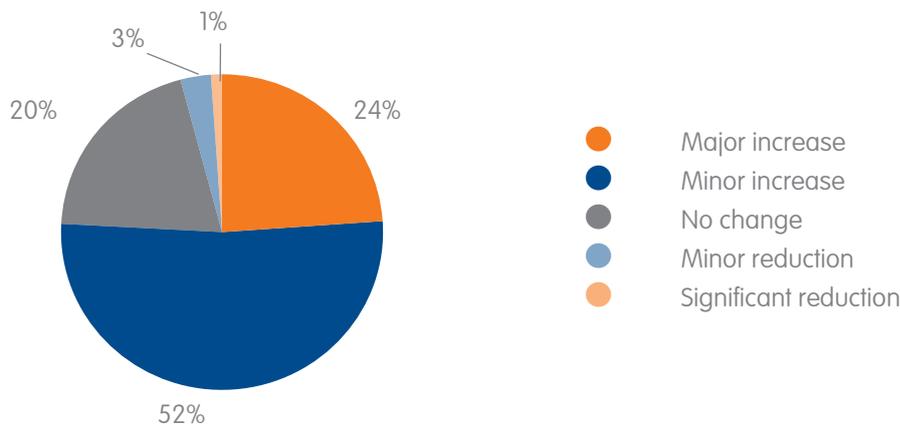
1. Emphasis upon learning



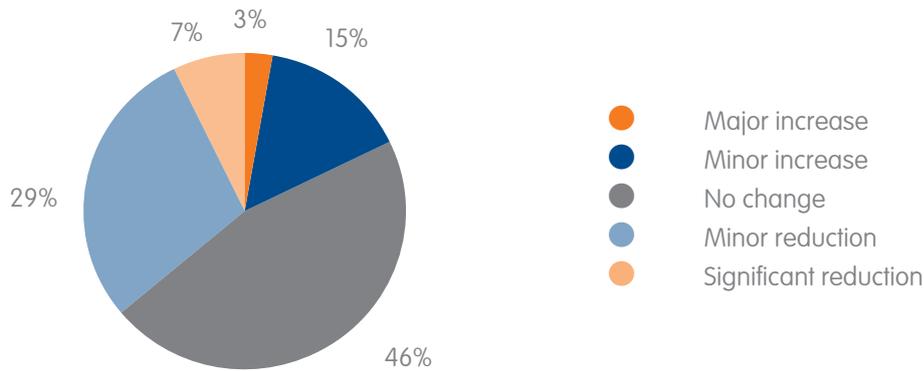
2. Travel for learners



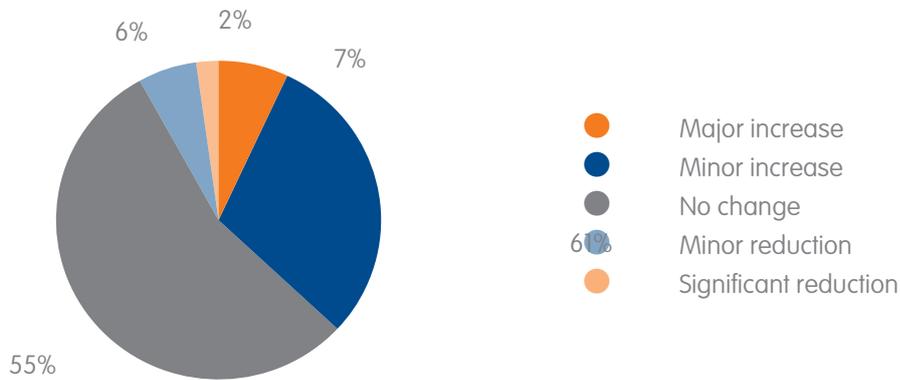
3. Shift to using technology (e.g. e-learning/virtual delivery)



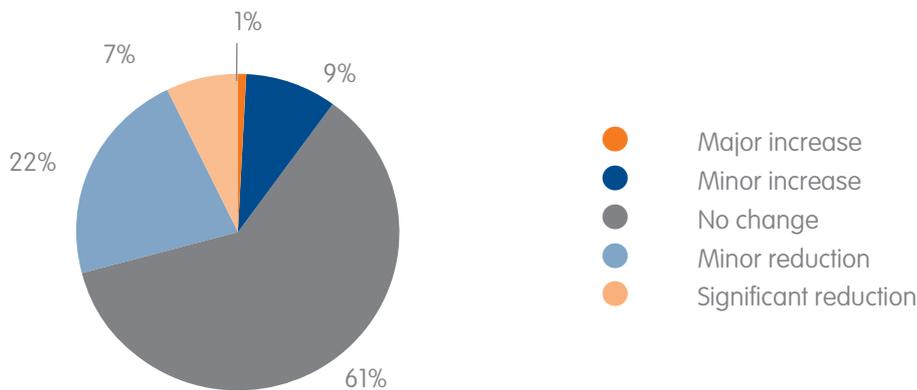
4. Travel for trainers and instructors



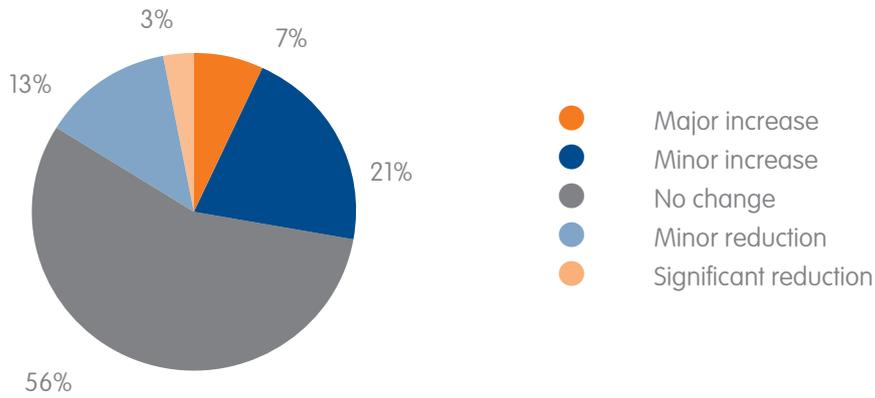
5. Re-use of existing content



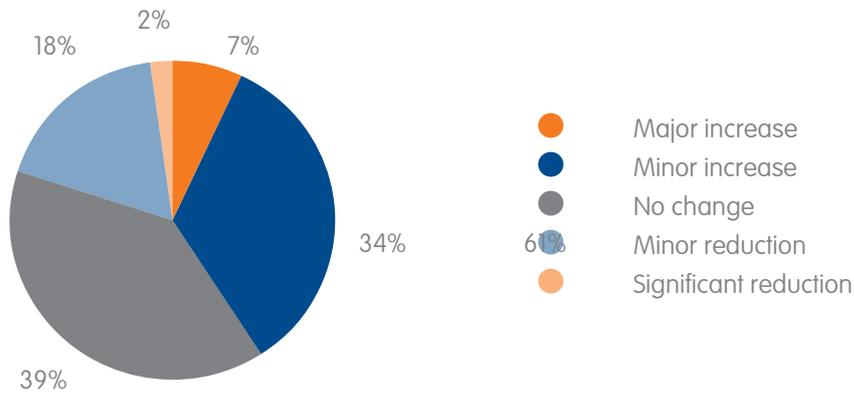
6. Staffing



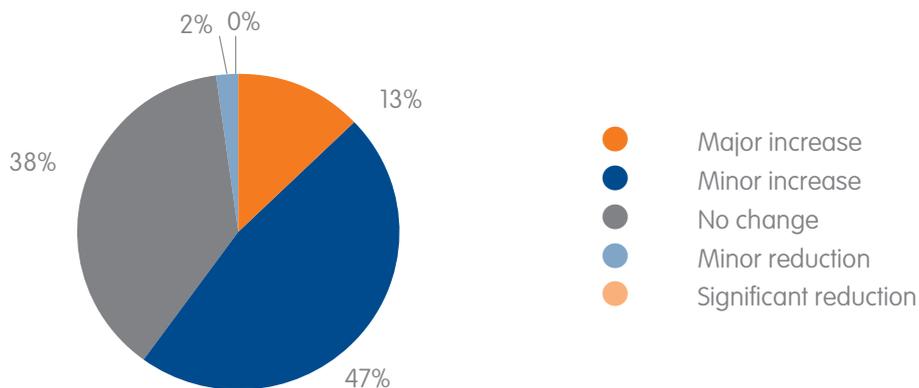
7. Organisation of the learning function and activity



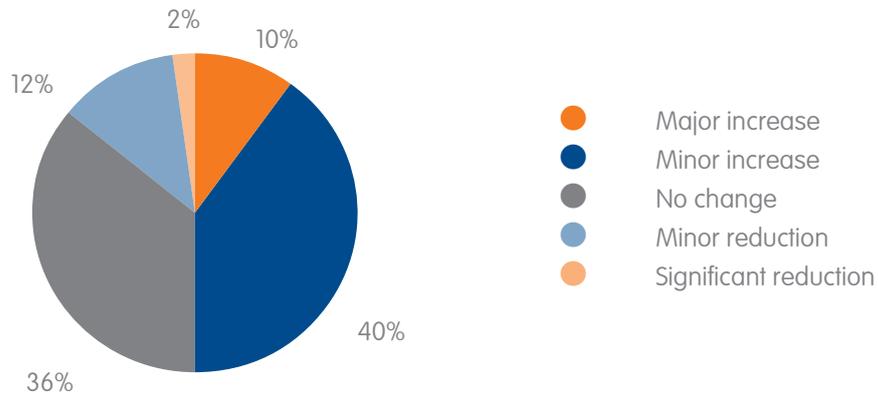
8. Learning services provided



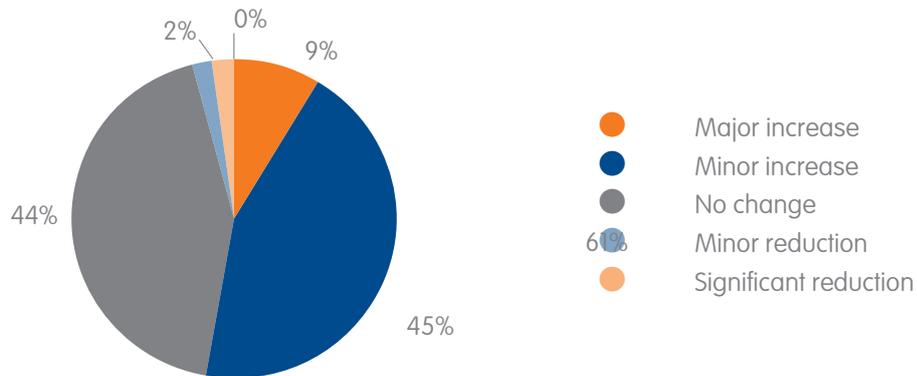
9. Reliance on informal learning



10. Creation of new learning content

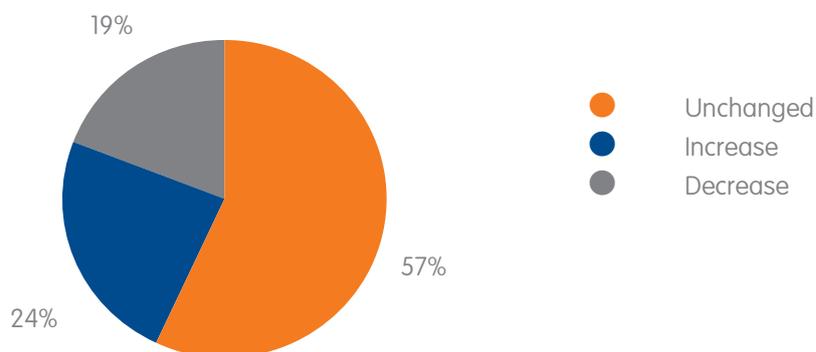


11. Use of social media

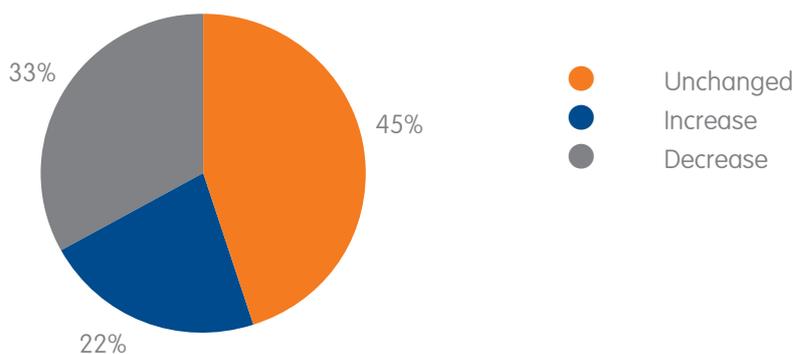


Question 3: Thinking about your budget spending in the next six months from June 2012 to November 2012, do you think it will increase, decrease or stay the same for the following activities?

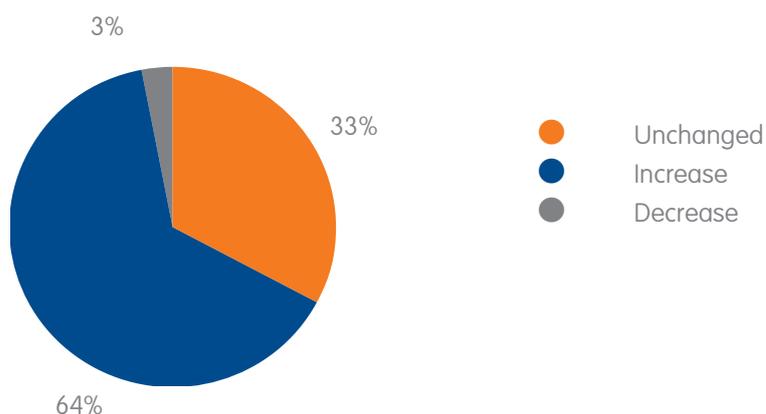
1. In-house trainers and/or instructors



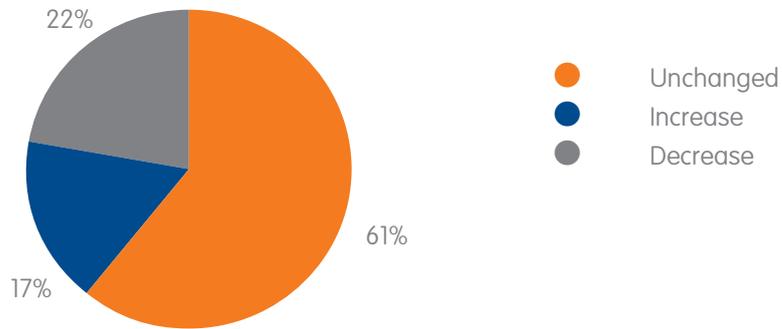
2. Outsourced delivery



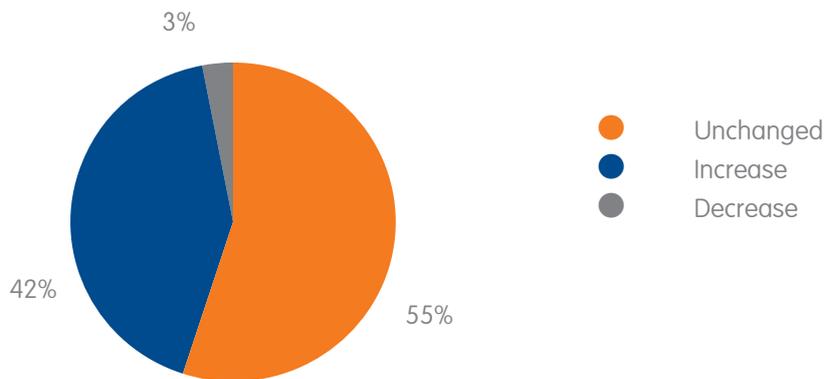
3. Technology-based learning (e.g. e-learning programme development)



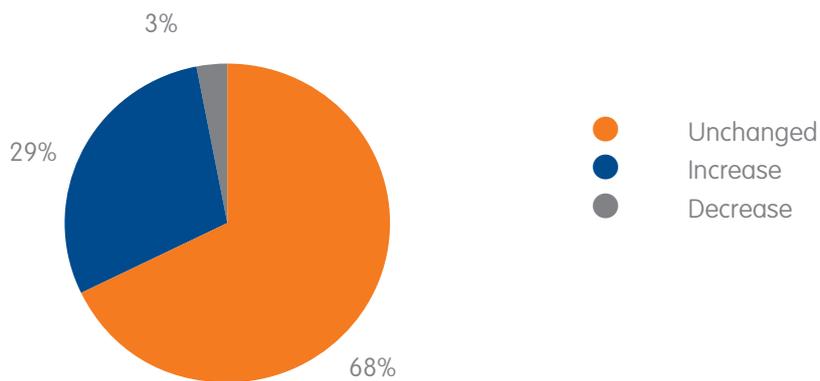
4. External coaching



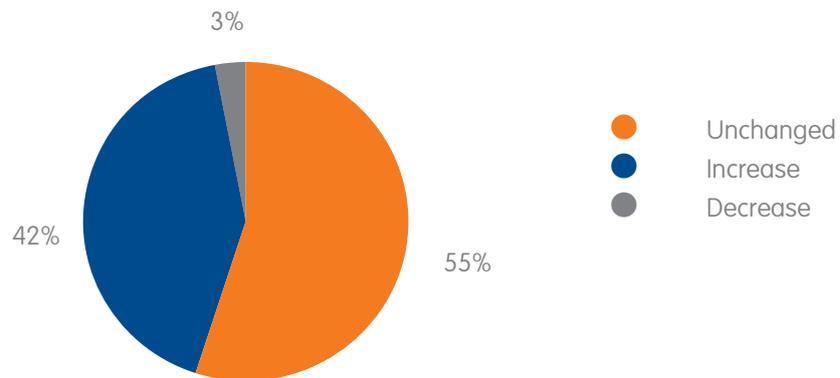
5. Informal learning support



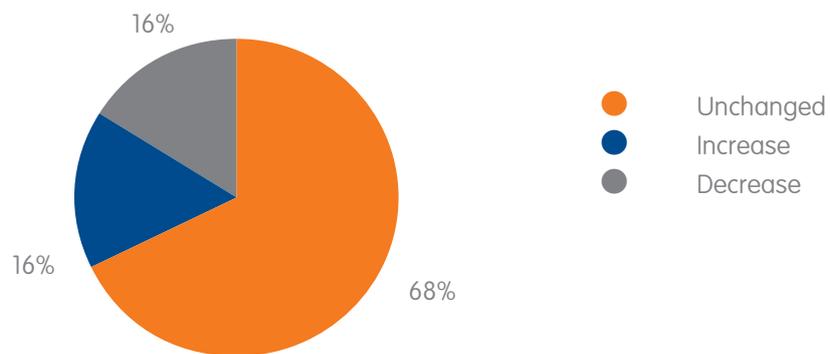
6. LMS system



7. Use of social media in your learning and development solutions



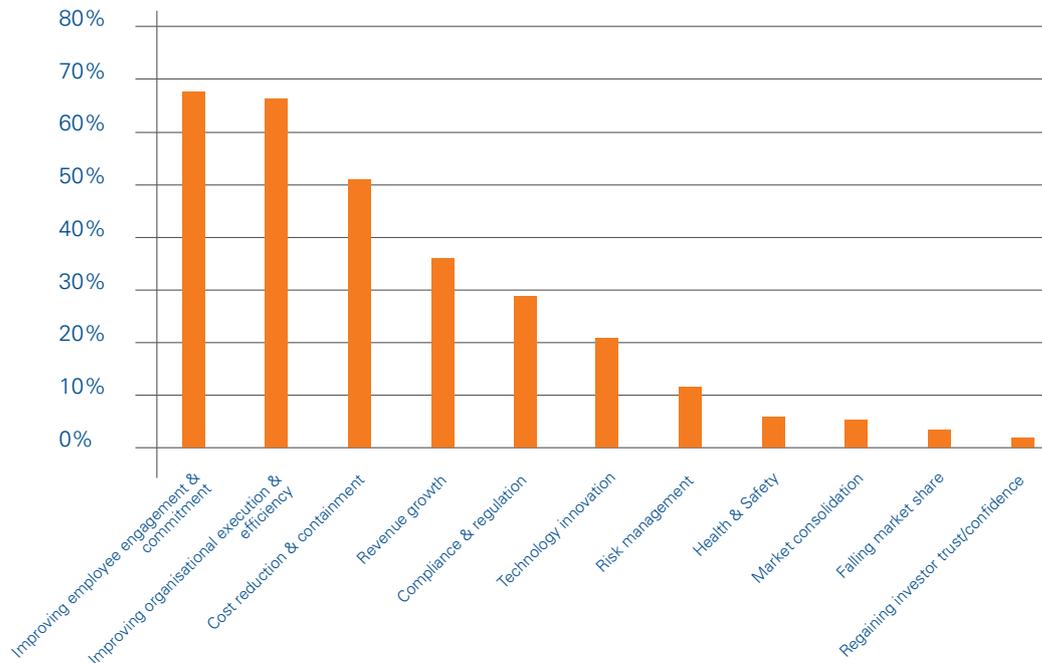
8. External support for functional development (e.g. strategy review)



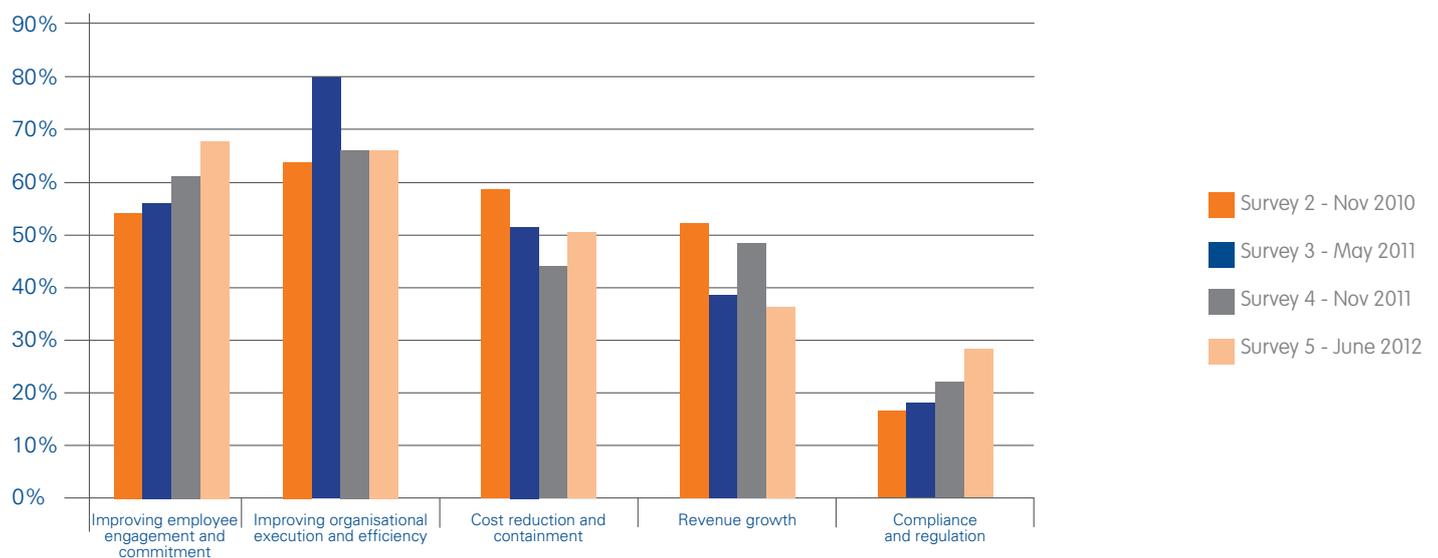
Question 4: We asked respondents to rank their most important business drivers and identify key areas of focus for their L&D function. We also asked about two new hot topics.

1. Business drivers

What are the top three business drivers which will impact upon your L&D department in the next six months, from June 2012 to November 2012?

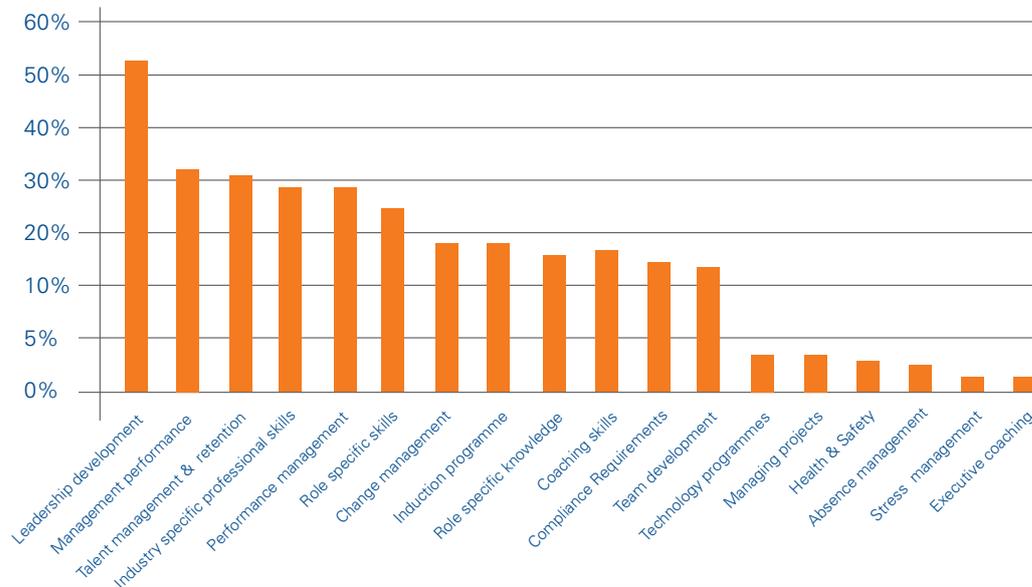


Comparison of top business drivers across Surveys 2, 3, 4 and 5

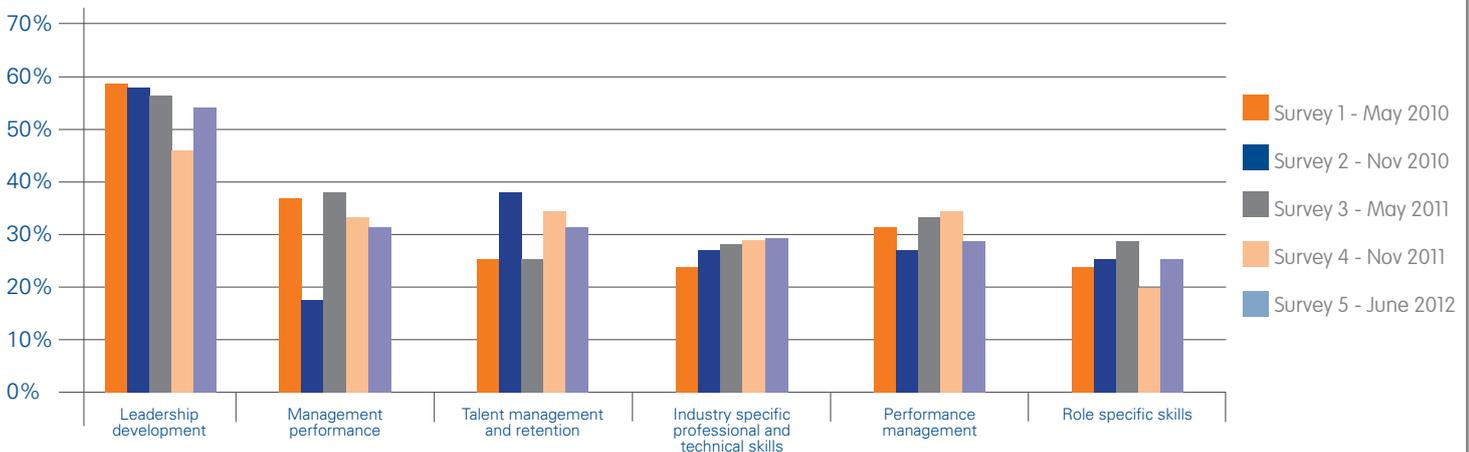


2. Key areas of focus for L&D

What are the top three areas your learning department will be focusing on in the next six months, from June 2012, to November 2012?

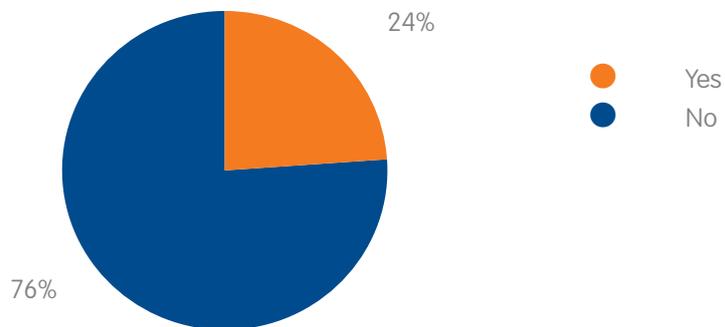


Comparison of L&D's key areas of focus across Surveys 1, 2, 3, 4 and 5

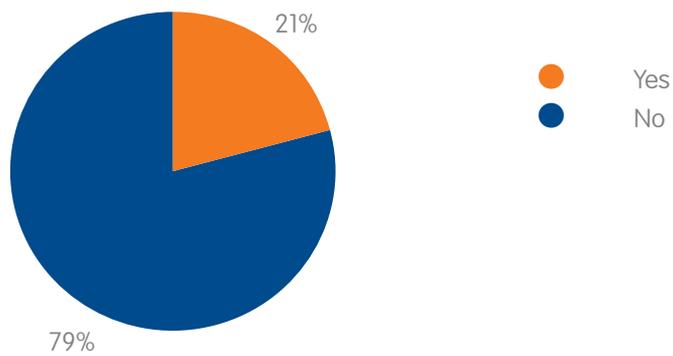


3. Hot Topics:

Do you have a specific, agreed strategy for informal learning?



Have you launched or trialled a mobile learning initiative in the last six months?





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