

Future of Digital Learning Survey

Brought to you by Adobe and Training Magazine Network

The COVID-19 pandemic has had profound — and probably lasting — impacts throughout society, affecting how users consume learning and how learning and development (L&D) teams deliver learning. The necessary shift to remote work has made digital and live online learning an invaluable tool for learners and L&D teams alike.

This 2021 survey of learning and development (L&D) professionals by Adobe and Training Magazine Network, “What is the future of digital learning in 2021 and beyond?” indicates that digital learning is here to stay as part of a dynamic, hybrid learning model.

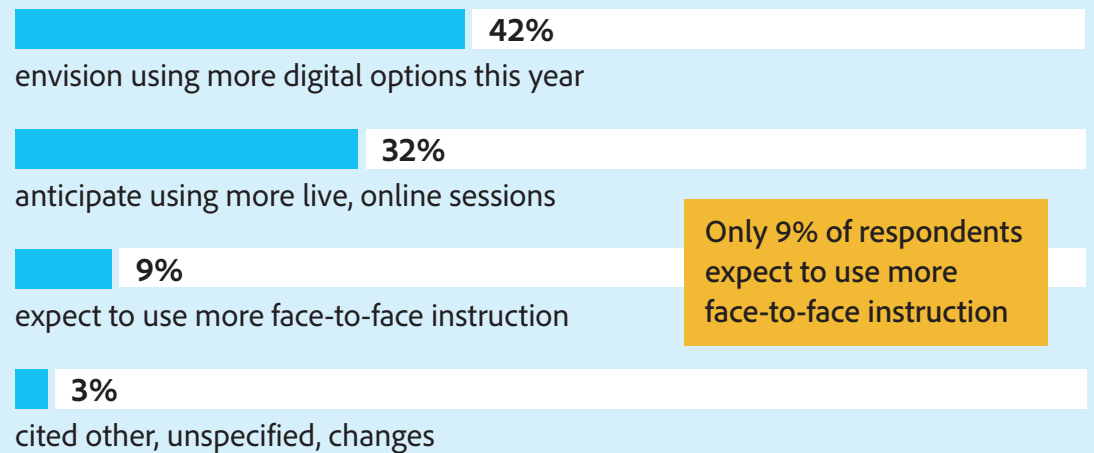




Digital Delivery Is Poised to Increase

Training throughout 2020 was digital because of necessity. In 2021 and beyond, digital learning will be a choice. Live, online and on-demand sessions will become increasingly important learning delivery options.

Question: *How do you see your modes of delivery changing this year?*



That prediction is based on the efficiency of digital and live, online sessions to deliver a cohesive message to learners throughout the world, who often cannot attend in-person classes for logistical or budgetary reasons. No change is expected by 14% of survey respondents.

Who Does L&D Train?

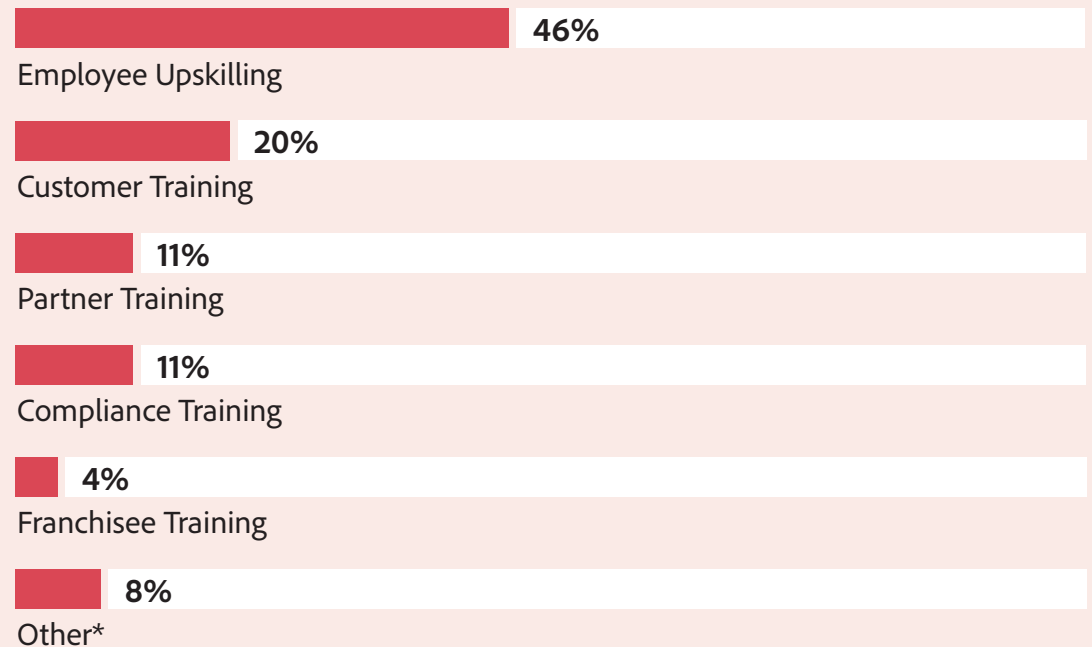
The overwhelming focus of training is for internal employee upskilling, closely followed by customer and partner training (31%). New technologies are coming on the scene, enabling new ways of working that enhance effectiveness. To leverage these innovations, employees must be equipped not only to use them, but to understand how using them helps them in their roles.



As the pandemic forced people to find new ways to connect, customer and partner training became increasingly important because of their direct impact upon sales.

Top Learning Use Cases

Question: What is your primary L&D use case (for decision makers)? (select one)



**Some examples of "other responses" included new hire training, sales training, dealer/distributor training, and faculty training.*

Blended Learning: The Best of All Worlds

For most learning applications, there is a clear trend towards blended learning that incorporates live online sessions with face-to-face instruction and self-paced digital learning. The rationale is that a blended approach helps learners throughout the world learn in a way that fits their circumstances and learning styles.

Compliance training is the one exception. 38% rely primarily on self-paced digital learning. Blended learning is favored by 22%, followed by 16% who mainly deliver live online sessions. Only 6% rely mostly on face-to-face instruction. The reason, L&D leaders say, is because compliance training often is based on guidance and regulations that need to be followed rather than explained or discussed.

Question: For each of these L&D use cases, what is the current mode of delivery?

	Blended	Live Online	Digital, Self-Paced	Face-to-Face
Internal Employee Upskilling	40%	21%	22%	12%
Customer Training	20%	23%	17%	9%
Partner Training	18%	19%	16%	5%
Franchisee Training	13%	14%	11%	5%
Compliance Training	22%	16%	38%	6%

Training Set to Increase in 2021

Across the board, most respondents say their level of training in 2021 is comparable to, or more than, that of last year. Overall, a higher percentage of organizations say they are providing additional training for each of their constituencies than those who say they are reducing training.

This trend underscores the need for continued learning and, sometimes, a response to pandemic-related restrictions. For example, when sales forces had to learn new skills and strategies to connect with customers during the pandemic, L&D stepped up.

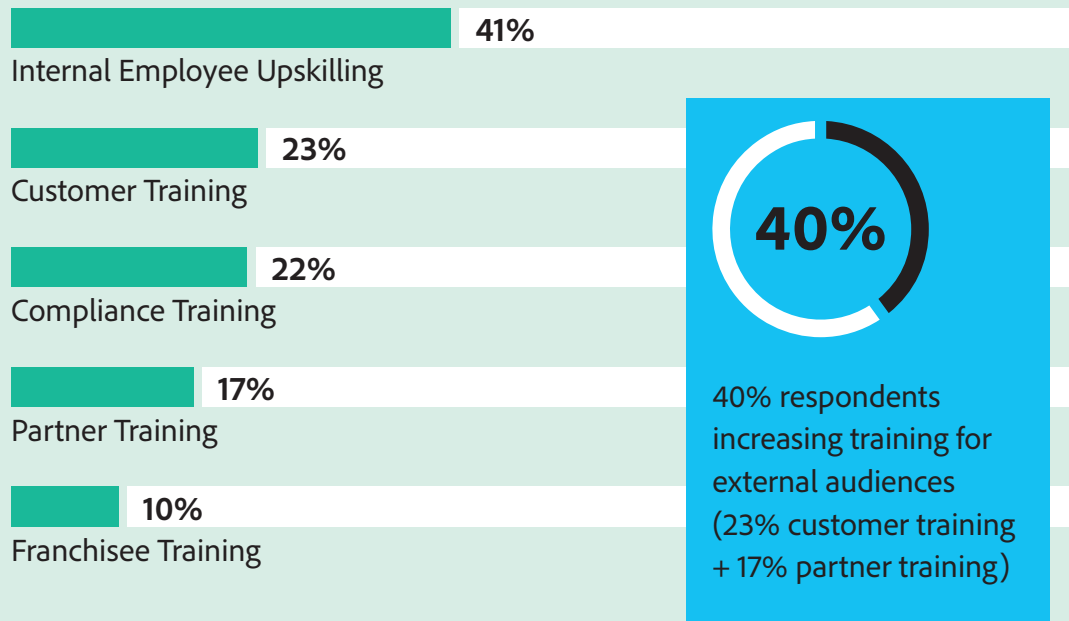
Question: For each of these L&D use cases, what is the change in your enterprise training compared to last year? (rounded to nearest percentage)

	Less than last year	More than last year	Not applicable	Similar to last year
Internal Employee Upskilling	11%	41%	6%	42%
Customer Training	10%	23%	31%	35%
Partner Training	11%	17%	41%	31%
Franchisee Training	11%	10%	57%	22%
Compliance Training	12%	22%	19%	47%
Other	9%	19%	45%	27%

Types of Training in Demand

Internal employee upskilling is seeing the greatest increase over last year, compared to other L&D use cases.

Question: What is the increase in your enterprise compared to last year for the following types of training?



Only 10% to 12% of companies say they decreased training. The greatest decrease (12%) involved compliance.



The Training Budget

Employee Upskilling and Customer Training are the two learning use cases receiving the largest percentage of most L&D budgets, at 20% each. Notably, 8% of organizations devote their entire training budget to upskilling.

Question: *What percentage of your training efforts/budget are spent on the following?*

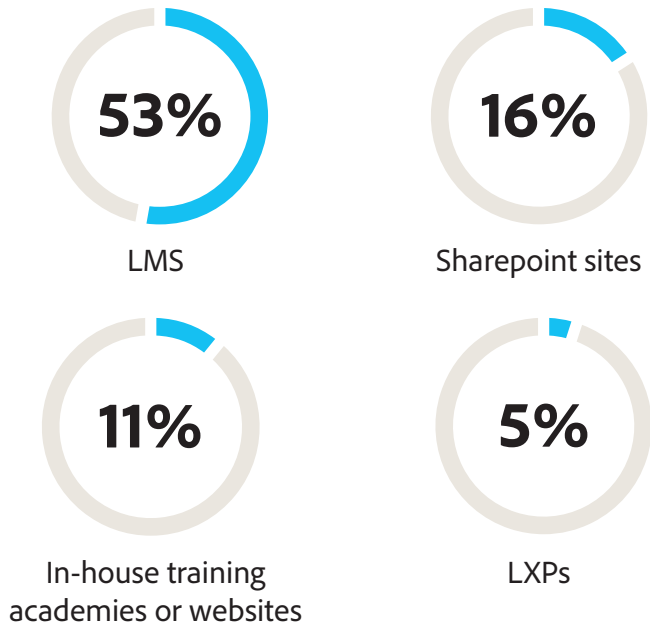
Budget Allocation	10%	15%	20%
Internal Employee Upskilling	11%	3%	14%
Customer Training	18%	6%	18%
Partner Training	22%	7%	18%
Franchisee Training	18%	7%	14%
Compliance Training	27%	7%	17%

Unspecified activities generally constitute a small fraction of training budgets, but for 6% of respondents, they account for the entire training budget. Nearly a quarter (23%) allocate 10% of the training budget to other activities, while 8% allocate 20%.

For Digital, LMS Is the No. 1 Choice

When L&D professionals deliver digital training, they overwhelmingly use a learning management system (LMS). Nearly 53% favor this platform. The closest contenders are Sharepoint sites (16%) and in-house training academies or websites (11%). Learning experience platforms (LXPs) were used by only 5%.

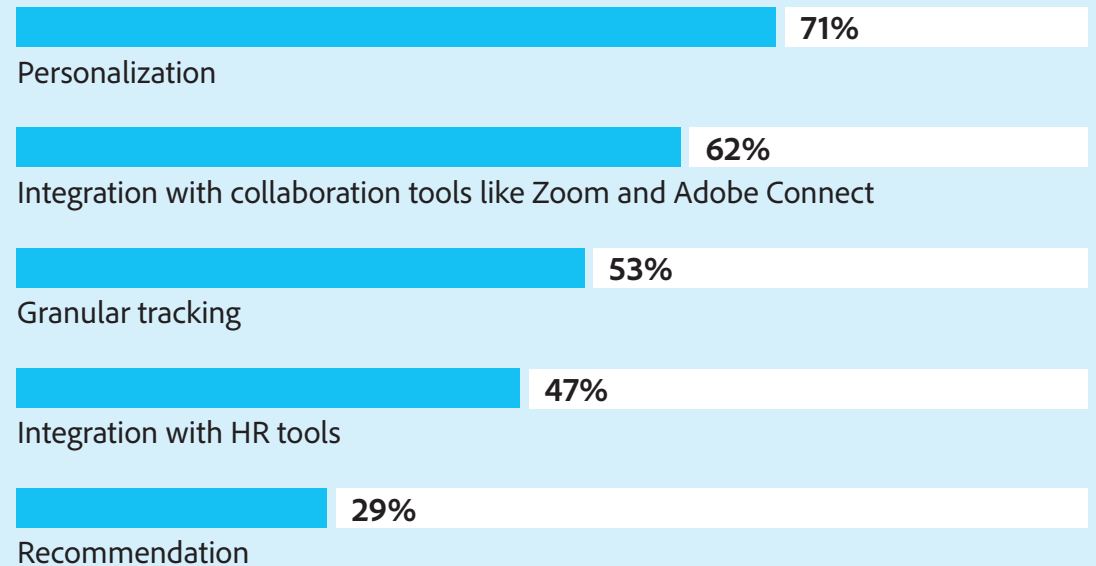
Question: *What is your primary mode of delivery of digital training programs?*



Top LMS Features — Personalization and Integration with Collaboration Tools

The choice of an LMS may be based on functionality, as well as familiarity. Of key features, L&D professionals say these are the five most important:

Question: *Which of these features are important in an LMS/LXP for delivering effective training programs digitally?*



LMS – New Feature Wishlist

When it comes to new features in a learning management system, L&D professionals crave flexibility and ease of use, and the ability to interact more with learners to enhance engagement. Some of the newer asks were around automation, social learning and marketing tools for pull-style learning.

The Top Asks

- Gamification
- Live streaming
- A more stable platform during high usage
- Training automation
- Full integration with online meeting platforms
- Pull-style learning
- Collaboration/social learning





Modern Learning Platforms Are the Need of the Hour

More than 60% share their data with learners' supervisors to help them develop experiences and therefore continue to enhance their capabilities and advance their careers.

Although personalization is the most frequent feature request, **only 29%** of platforms support it. There is a great need therefore for modern platforms that are attuned to learners' individual needs. As learning becomes more personalized, this need will only grow.

The Future of L&D

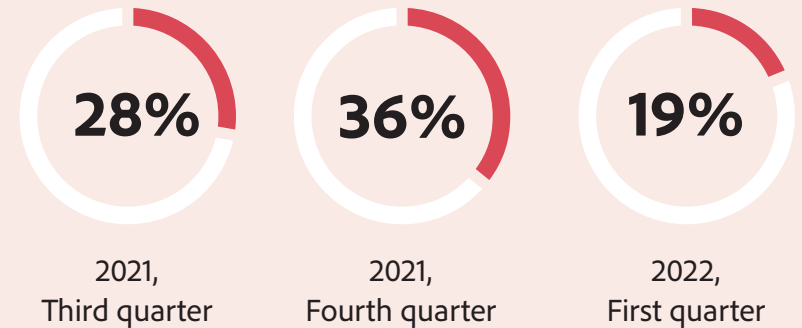
There are signs the conditions that dominated 2020 may be winding down, as facilities open and people return to their normal workplaces. The majority of respondents are optimistic that people will return to the office full-time this year.

In the meantime, L&D professionals are using their time wisely. A large percentage of L&D professionals are involved in re-prioritizing their plans and expanding the scope of their training programs — possible because of the shift to digital learning.



Question: When do you envision your workforce and clients returning to the office full-time?

Here are their predictions:



Question: How is this timeline affecting your training plans and programs? Check all that apply.

55% are reevaluating programs and realigning them with current business needs.

52% are now delivering content to previously underserved offices.

Only **13%** say they paused programs.



Survey Takeaways

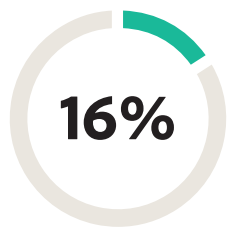
Looking to the future, respondents to this survey indicate they expect digital learning to increase. Usually, this will involve a blend of live online, digital self-paced and face-to face learning aimed, most often, at internal employee upskilling. As blended delivery grows, companies are looking to modern platforms to increase personalization in ways that make learning more robust and more effective.

As training continues, L&D is prepared to use the lessons of the past year to continue to enhance learning options for all their learning constituencies.

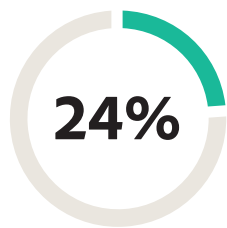
About the Survey

The Adobe and Training Magazine Network survey, “What is the future of digital learning, in 2021 and beyond?” was conducted during April 2021. More than 1276 L&D professionals responded.

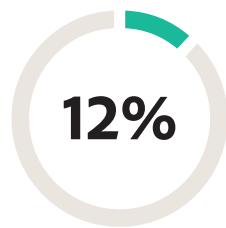
Approximately one-quarter were training specialists and another quarter were managers/supervisors. Instructional designers and chief learning officers comprised another quarter of the respondents, with the remainder engaged in other roles in the company.



Instructional designers

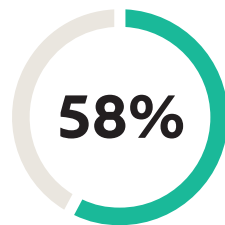


Managers/Supervisors

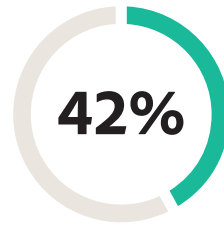


CLOs/
Heads of L&D

More than 37% have been in their industry longer than 10 years, and 21% have between 5 and 10 years' experience. The remainder have less than 5 years' experience.



5+ years' experience



Less than 5 years' experience

Respondent Demographic by Industry

- Health and Medical: 16%
- Financing and Banking: 11%
- Government and Military: 10%
- Manufacturing: 9%
- Consulting: 7%
- Business Services: 5%
- Real Estate and Insurance: 5%
- Retail: 5%
- Wholesale and Distribution: 4%
- Communications: 3%
- Hospitality: 3%
- Transportation and Utilities: 4%
- Other: 16%

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Training Magazine Network

Training Magazine Network is a platform for social learning and networking for the exchange of ideas and resources among global learning professionals and other thought leaders. It is the primary social learning community and hosted webinar network for *Training* magazine. *Training* magazine is a 57-year-old professional development print and digital publication that advocates training and workforce development as a business tool. *Training* magazine is published by Lakewood Media Group, LLC.

About Adobe Captivate Prime

Adobe Captivate Prime allows you to train employees, partners, and customers effectively with a modern digital learning platform. Deliver a personalized learning experience, powered by AI and ML that encourages discovery and consumption. Take advantage of rich analytics that enable effective decision making. Embed learning in the flow of work by integrating the LMS with other enterprise platforms via a robust API framework.

To learn more, contact – captivateprimesales@adobe.com

