elementrix

DIGITAL LEARNING IN ASIA 2020

MALAYSIA & SINGAPORE

MIM
MALAYSIAN INSTITUTE OF MANAGEMENT
Institut Pengurusan Malaysia

SIM

HIGHER EDUCATION AND RESEARCH GROUP
HERG

"The only sustainable competitive advantage is an organization's **ability to learn faster** than the competition."

Peter Senge
Management Thinker
MIT Sloan School of Management

Table of Contents

About Us

Elementrix is an award-winning, humanising digital solutions company based in Kuala Lumpur.

We help clients create digital learning success in digital learning at a human level.

There is a lot of technology on the market. The barrier to companies achieving ROI in the digital learning space is to achieve engaged learners.

Elementrix consults with, and enables, organisations to be effective in the implementation of digital learning.

OUR EXPERTISE

1. Reimagine Experiences with Augmented Reality
2. Reimagine Learning Reinforcement
3. Reimagine Employee Experiences
4. Reimagine Digital Advisory

We are a part of TMI Consultancy Sdn. Bhd., a respected, innovative and award-winning training and consultancy company that represents TACK International and TMI, two of the world's largest learning and people development companies. TACK TMI has one of the widest ranges of company-developed training programmes in Asia, spanning the areas of Customer Experience, Culture Change, Leadership, Sales, Personal Development and Safety Culture. Our programmes have been developed overseas and adapted for the Asian market.

Survey Partners

Knowledge Partners

Malaysian Institute of Management (MIM) is a leading membership-based organisation which, for over half a century, has served as the definitive voice of leadership and management across the country.

MIM works to achieve professional career aspirations and organisational goals through immersive learning initiatives and training strategies.

Our Professional Certifications and education programmes help organisations, entrepreneurs and governments remain relevant, engaged and driven in an increasingly competitive world.

The Singapore Institute of Management (SIM) Group Limited is a leading private education and lifelong learning institution in Singapore. We offer a diverse range of education pathways and professional training and are known for the rigour and quality of our programmes.

Founded in 1964 on the initiative of the Economic Development Board to support Singapore's industrialisation, SIM Society is a professional society with over 34,400 individual and corporate members who have access to a wide range of learning courses, published resources and networking events.

Today, the SIM Group is a diverse and vibrant organisation that caters to different segments of learners.

Research Partner

HERG is a consulting and policy advisory organisation which supports and enhances productivity in research and education. The original impetus for HERG came from applied research that was aimed at understanding more about research and education productivity and efficiency in the university sector in Australia. This research has now grown and has been extending to Asia, the US and UK.

Today, HERG and its sister organisation, Research Coaching Australia, make contributions to research across many settings.

Glossary of Terms

Adaptive learning

Provides personalised learning that adapt to where the learner needs to go, based on current levels of knowledge and skill.

Artificial Intelligence

Refers to simulated intelligence in machines. These machines are programmed to "think" like humans and mimic their actions.

Augmented reality

Engages the learner by super-imposing content e.g. videos, text, three dimensional images, into our physical worlds e.g. learning manuals, posters, job aids, in-workplace instructions.

Blended learning

Involves a combination of off-line (human interaction) and on-line (digital) methodologies.

Digital learning solutions

Refers to the use of online technology to enhance learning programmes. "Digital" can be standalone, a part of a learning journey or a part of a blended learning programme.

Gamification

This is the process of applying typical elements of game playing (e.g. point scoring, competition with others, rules of play) to learning to motivate participation and engagement.

Learning eco-system

An integrated off-line (e.g. classroom training, coaching) with on-line options to achieve learning and business objectives.

Micro learning

Splits learning into small, bite-sized chunks, enabling learning to be spaced out over a period of time.

MOOC

Massive Open Online Courses (MOOCs) are free online courses available for anyone to enrol.

Social learning

Involves learning from colleagues, discussing topics, uploading, sharing and liking.

Virtual Reality

Refers to an immersive and interactive computer-generated experience taking place within a simulated environment.

Foreword

Donald Taylor is a globally recognised expert in the fields of workplace learning and learning technologies.

The second annual report on digital learning in Asia should be widely welcomed. Without data and insight like this, Learning and Development (L&D) practitioners are left in the dark, able only to react to circumstances. With it, we have the vital information we need to move from tactical to strategic action.

And the key strategic challenge highlighted in this report is not what you might expect from the title.

Digital learning offers considerable benefits, when implemented effectively. The key word here, however, is not 'digital' but 'effectively'. Over a thirty-five-year working life entirely spent with technology and learning, I have seen the technical side of implementations grow steadily less complex, thanks to a combination of increased processing power and the internet. One thing that has not changed over that period, however, is people. They remain as complex as ever.

This report highlights **three** human factors currently limiting the effective use of digital tools to support workplace learning (and although the report focuses on Asia, these issues apply equally elsewhere in the world).

The **first** is the need for employee engagement – as the report makes clear, if people do not want to use the digital tools we supply, then all organisational investment in licensing, in content and in implementation is wasted. And engagement is not something to be added on to a roll-out at the end, it should be fundamental to the implementation in the first place. As the report says, human-centred design is essential.

The **second** human factor is stakeholder engagement. When the L&D function could operate as a reactive supplier of training courses, this was barely needed. Now, it is essential, if L&D is to play the strategic role that it should, and which organisations increasingly demand.

The **third**, and most important of the human factors is the skills of the L&D practitioners themselves. This underpins both employee and stakeholder engagement, and is rightly a theme throughout the report. Most people come into our field because they are good at one of two things: creating courses or delivering them (face-to-face or online). Now, they are being asked to carry out new tasks that have nothing to do with these two core skills.

Developing these new skill sets is not necessarily easy, but it is certainly possible – I have seen L&D practitioners enthusiastically embracing them, and becoming increasingly strategic in their impact when they do. It is for this reason that I am so pleased to see this latest edition of this invaluable report. We need more solid evidence like this to guide our practice, and I look forward to many more editions in years to come.

Donald H Taylor
Chair, Learning and Performance Institute, UK

Why this report is important

The Digital Learning in Asia 2018 survey was conducted amid a growing level of talk and interest in the learning and development community around **"getting into digital learning".**

The 2018 report filled a knowledge gap on digital learning in Malaysia and Singapore.

The survey provided base-line data to help understand the then current and anticipated state of the digital learning in Malaysia and Singapore in terms of factors including the extent of usage of digital in learning and development (L&D), which technologies are being used, anticipated growth, learner engagement, barriers to the implementation of digital learning and more.

We were interested in whether the market talk was being converted into action.

We found that the L&D industry placed high levels of importance on digital in learning. However, we found that the talk was not backed up by action in terms of adoption of digital learning in Malaysia and Singapore.

The 2020 survey report is different to 2018 in that:

- The 2018 report **described** the state of L&D in a digitally enabled world.
- This year's report **identifies key insights,** based on a comparison of the 2018 and 2019 data.

This report provides insights under the following broad headings:

- **Breadth of use** i.e. the percentage of organisations adopting digital as a part of their learning and development programmes

- **The depth** of use of digital learning within organisations i.e. the extent that digital learning is being utilised within organisations

- **Quality of outcomes** from digital learning

- **Barriers** to the implementation of digital learning

These insights are documented in the remainder of this report.

This report also provides high-level actions that can be taken by corporate L&D teams. These actions are backed up with data to support the recommendations.

Coronavirus: The "Burning Platform" for Corporate Digital Learning

This report was in the final stages of drafting when, day by day, news of the coronavirus unfolded at an increasing pace in February 2020.

In March 2020, the World Health Organisation declared a global pandemic.

A "new normal"

Coronavirus has had a major disruptive impact on corporate learning and development. The concept of "social distancing" - reducing social contact between people - has become a common practice. As a result, corporate face-to-face training courses have been cancelled in bulk in Asia, and around the world.

Emeritus Professor Keith Houghton, Chief Academic Strategist from the Higher Education Research Group Australia, wrote an Opinion Editorial for one of Australia's most respected publishing groups, The Australian. The title of this was "Coronavirus: Door opens for digital delivery of learning". (The Australian, Higher Education Supplement, 18 March, 2020).

In that article, Professor Houghton said, "It would be mistaken to think that this pandemic will come and go, and things will go back to the way they were. There is profound change. It can be seen as a threat or an opportunity. Those who see it as the latter will seize a competitive advantage. The first movers will win."

Professor Houghton's views are equally applicable to the world of corporate learning and development. We agree that, what is known as Covid-19, will not be a passing phase and that corporate life will "go back to normal".

Rather, we are in a "new normal".

Impact on corporate learning and development

The vast majority of organisations have been under-prepared in 2020 to deal with the Covid-19 disruption. Moving forward, organisations will develop plans to ensure that the scale of disruption is avoided in future.

This has already accelerated the prevalence of virtual meetings. And, we believe, it will accelerate the speed of adoption of learning in a virtual world.

Put somewhat differently, the "burning platform" for the adoption of digital learning is now both important and urgent.

Traditional classroom training will continue to play a role. However, organisations will seek ways to reduce face-to-face training days, and to replace them with digital methodologies.

Impact on the findings from this report

The data from this report contains findings in relation to the anticipated increases in the adoption of digital learning. In the "new normal", we believe that there is a high probability that these predicted growth rates will be exceeded.

We believe that, in the "new normal", there will be accelerated experimentation and adoption of "new learning technologies" such as social learning, adaptive learning and gamification. We predict that the prevalence of Virtual Classroom will increase significantly.

The report indicates that organisational vision can be an accelerator to the development of digital learning in organisations. To date, most organisations have lacked this vision, focusing more on digital learning as a method to cut costs. We believe that, post Covid-19, C-Suites in organisations across the world will envision digital learning as being critical to running business as usual. This will lead to significantly higher levels of priority being placed on digital learning by senior leadership teams. This will be accompanied by higher budget allocations.

The report also indicates that there is a competency gap among corporate learning and development professionals in the implementation of digital learning. We believe that the burning platform will be the catalyst for these professionals to upgrade their digital learning and design competencies. There will be strong business cases for the development of learning and development teams so that they can play a more effective role in the implementation of digital learning.

Results at a Glance

The Digital Learning in Asia 2018 report was extensive and descriptive. The Digital Learning in Asia 2020 report provides a number of key insights. These are as follows.

Breadth of Use

The obvious: the use of digital learning across organisations is rising

16% predicted increase of significant use of digital tools in L&D in the coming 12 months.

Depth of Use

In a world awash with innovation, traditional technologies remain dominant

Despite the growth of new learning technologies, L&D has not moved significantly beyond traditional learning technologies used in the past.

Quality of Outcomes

Data on ROI from digital learning is inconclusive – but it's not necessarily a digital learning issue

L&D traditionally does not collect data to prove ROI.

This is contributing to budget barriers to the implementation of digital learning.

Barriers

L&D competence is a key barrier to the implementation of digital learning

a) **L&D has competence gaps in the implementation of digital learning at an organisational level**

It needs to move beyond its traditional model to become digital change agents and learning experience designers.

b) **L&D has competence gaps in implementation of learning technologies**

It needs to restructure itself to include people who feel comfortable to investigate, evaluate and implement learning technologies.

Barriers

Budget limitations are an organisational philosophy issue

- Budget limitations are a barrier to the implementation of digital learning.

- L&D is not able to provide ROI-based business cases for funding beyond existing budgets.

- Organisations need to move away from traditional ROI-based business case budgetary processes towards strategic intent to move to digital learning.

Low levels of adoption of digital in learning

Q: "To what extent do your company's current learning and development programmes contain digital elements? "

The results indicate that the use of digital technology in learning **remains at a low level.**

We were interested in the extent of "large, very large or complete" usage of digital in learning. The following percentages are the total of "large, very large or complete" from the survey responses.

THE EXTENT OF "LARGE OR VERY LARGE" USE OF DIGITAL

32%
MALAYSIA

23%
SINGAPORE

The breakdown of responses to this question is provided in Figure 1 below.

Figure 1: Extent of company's current L&D contain digital elements

N (SG): 111
N (MY): 203
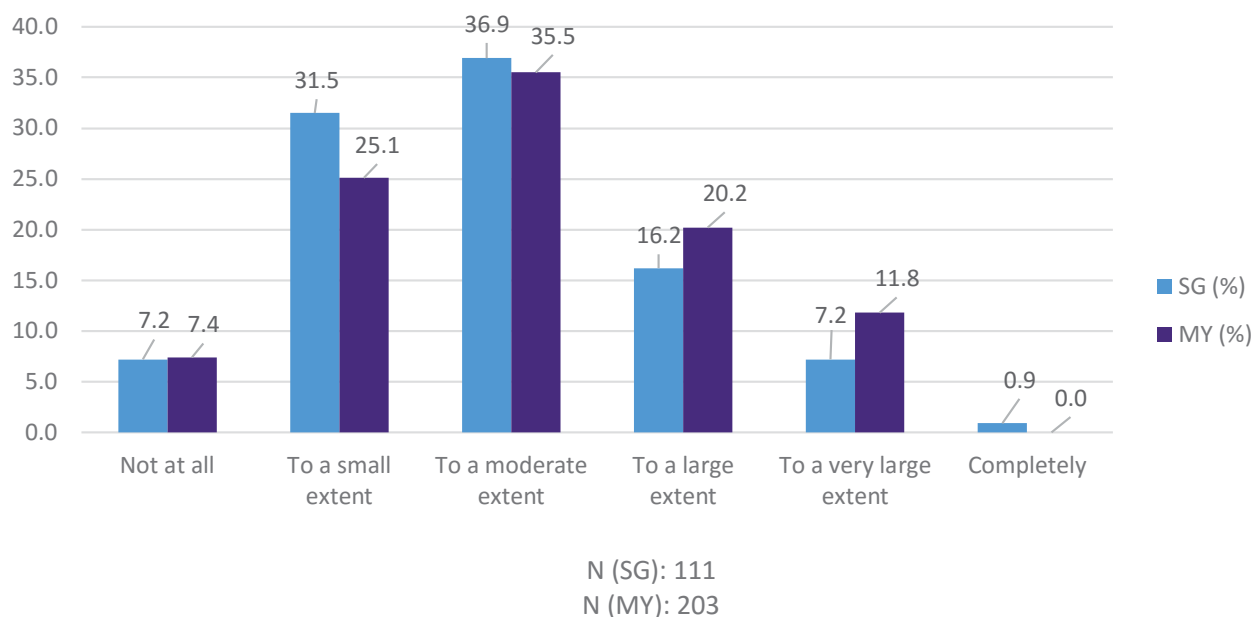
Anticipated market changes achieved in Malaysia, but an unanticipated result in Singapore

In 2018, we asked, "To what extent do you anticipate that your learning and development programmes will contain digital elements in 12 months' time?"

We were interested to understand the extent to which the 2018 predictions have materialised.

To assess this, in the 2019 survey, we asked, "To what extent do your company's current learning and development programmes contain digital elements?"

2018

2019

Q: "To what extent do you anticipate that your learning and development programmes will contain digital elements in 12 months' time?"

Q: "To what extent do your company's current learning and development programmes contain digital elements?"

MALAYSIA

ANTICIPATED INCREASE
11%
35%
24%
2018

ACTUAL INCREASE
8%
32%
24%
2019

Malaysian market shifted up as predicted

Malaysia achieved an increase of 8% percentage points - from 24% to 35% - in the extent of "large or very large" use of digital in learning, compared to an anticipated rate of 11%.

SINGAPORE

ANTICIPATED INCREASE
19%
52%
33%
2018

ACTUAL DECREASE
9%
33%
24%
2019

Unanticipated results in Singapore

In 2018, Singapore anticipated an increase of 19% i.e. from 33% in 2018 to 52% in 2019. The actual reported level in the 2019 survey was 24%. At face value, this represents a decline in the extent of significant usage of digital in learning in Singapore.

We took the changes in the extent of **"large or very large use of digital"** to be a primary indicator of the growth in the occurrence of usage of digital in learning across organisations. Please refer to Figure 3 in the next page for details.

Figure 2: Extent of company's current L&D contain digital elements

N (SG): 111
N (MY): 203
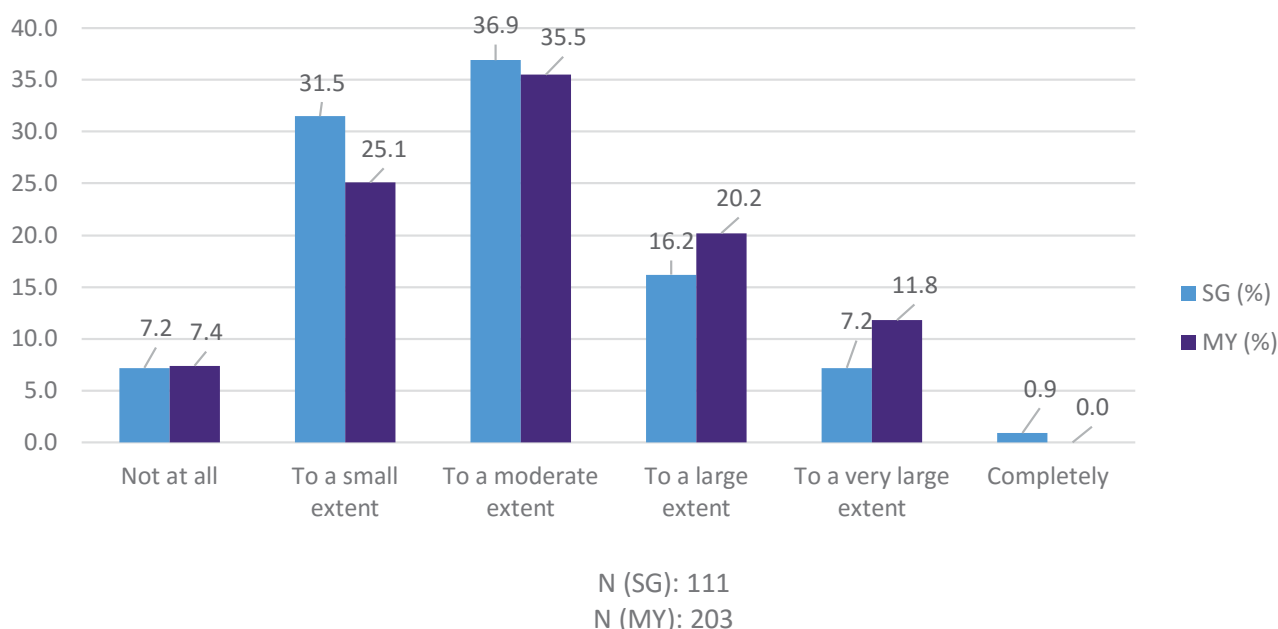
The expectations effect

An explanation for the result for Singapore

The research indicates that a possible reason for this unanticipated result is based on expectations of what constitutes "large" and "moderate" application of digital in learning.

As markets mature, their expectations go up. What was previously considered "large" use of digital is now considered "moderate" use.

This change in expectation is reflected in the data between 2018 and 2019:

- a significantly lower percentage - a reduction of 9% - of respondents who indicate "high" application of digital in learning, and

- a significant increase of 15 percentage points in "moderate usage" in 2019.

ACTUAL DECREASE

33% —
9%
24% —
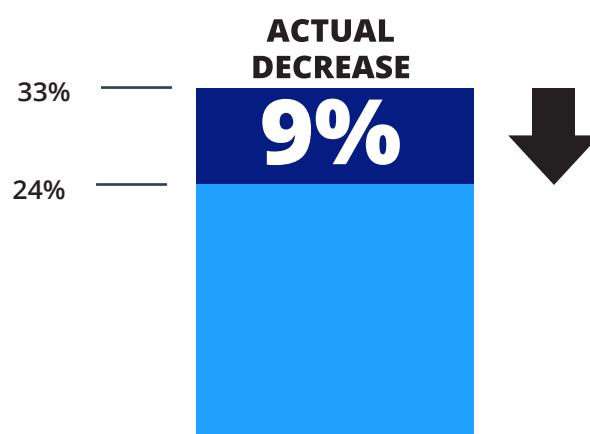
The conclusion that can be drawn for Singapore is that **extent of use of digital in L&D has increased.** However, **expectations as to what constitutes "large usage" of digital has changed.**

The adoption of digital in learning will grow in the next 12 months

We wanted to understand to what extent the market anticipates that learning and development programmes will contain digital elements in 12 months' time.

The data for anticipated change over the next 12 months was derived from a calculation of the difference between * the 2019 data for current **"large or greater use of digital"** in learning (see Figure 2 on page 13) with * the data for anticipated - in 12 months **"large or greater than large"** - usage (see Figure 3 below).

The results indicate **a significant anticipated increase in application of digital in L&D** in the next 12 months in both Malaysia and Singapore.

16

PERCENTAGE POINTS

in usage of digital "to a large extent"

ANTICIPATED INCREASE

ANTICIPATED DECREASE

16

PERCENTAGE POINTS

in usage of digital "to a small extent"
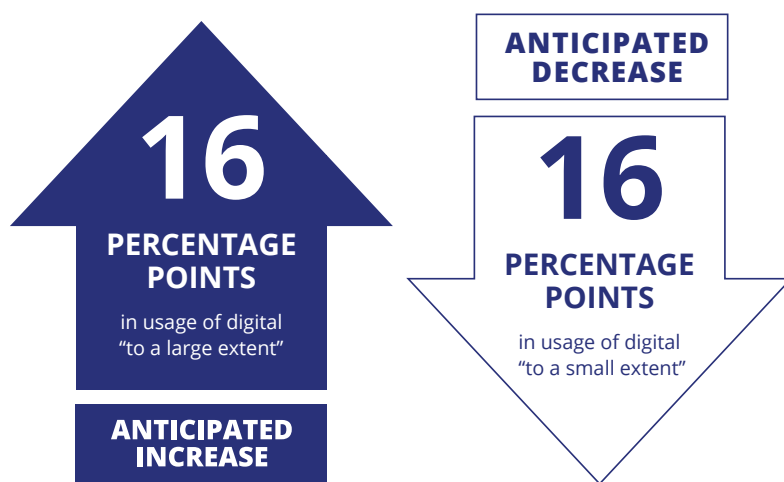
There are no significant differences between Malaysia and Singapore.

In the light of the impact of Covid-19, it is possible that these anticipated growth rates will be exceeded.

Figure 3: Extent of anticipating L&D will have digital elements in 12 months

	Not at all	To a small extent	To a moderate extent	To a large extent	To a very large extent	Completely
SG (%)	2.7	20.0	35.5	27.3	12.7	1.8
MY (%)	1.0	15.9	35.3	28.9	14.9	4.0
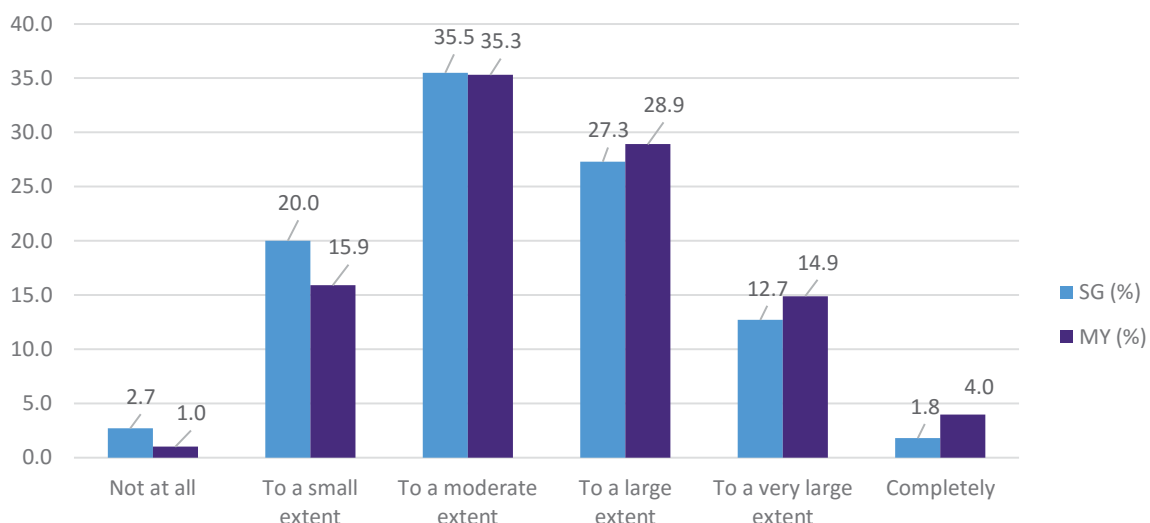
N (SG): 110
N (MY): 201

The market is sticking to "tried and true" learning technologies

Slow adoption of "newer" learning technologies

We asked respondents in 2018 to predict their anticipated usage of **specific technologies** in 2019.

The 2018 results anticipated, for 2019, were:

- A reduction in the usage of e-learning among organisations
- Significant increases in "newer" learner–engaging technologies – gamification, social learning, adaptive learning and micro-learning. Overall, the aspirations from 2018 have not been achieved.

The anticipated results did not materialise.

The data indicates that **the industry has been at "status quo"** in terms of mix of technologies, between 2018 and 2019.

The industry has not moved significantly beyond traditional digital learning elements that have been used in the past.

We investigated the adoption of different types of learning technology. A summary of the results is provided below.

Current Level of usage

High
75%
of respondents indicate that they use e-learning

e-learning

This is the dominant learning technology.

This market is expanding fast, transforming from traditional one-way, compliance based e-learning to a wide array of options offered by providers from around the world.

These options provide more engaging e-learning than has been available in the past. MOOCs e.g. Coursera and Udemy go under the category of e-learning. These are in major growth phases.

Content libraries

This market traditionally consisted of video libraries. It has expanded into a wide choice of content and video libraries. There is an increasing range of content libraries available on the market. Purchasing content is more cost effective than producing content in-company. Most organisations do not have high levels of expertise to produce their own digital learning content.

As would be expected, the results indicate a significant demand for learning content.

Medium
30%-36%
of respondents indicate that they use content libraries

Classroom delivery: virtual classrooms

Virtual classrooms enable content to be delivered to participants located in diverse locations. This saves significant employee time costs in the conduct of training. It also enables employees to attend training on their devices, with the potential of having higher participation rates and quicker roll-outs of training. This is anticipated to be an area of major growth. This will be accelerated in the light of issues such as COVID-19 which has severely restricted the way that face-to-face training is conducted in both Malaysia and Singapore.

Low-medium
20%-26%
of respondents indicate usage

Low
9%-20%
of respondents indicate usage

Learner engaging technologies

These technologies aim to engage the learner in a world where the learner has the choice of whether to spend quality time on digital learning. These technologies include gamification, social learning, micro-learning and adaptive learning. The range of these technologies is expanding fast.

Very low
< 10%
usage

Emerging learner technologies

These include augmented reality and virtual reality. At present, these technologies are relatively at the fringe of mainstream learning.

The following tables illustrate that **the industry has virtually remained constant in terms of occurrence of usage of learning technologies** between 2018 and 2019 in both Malaysia and Singapore.

As can be seen from Tables 4 and 5 below, the extent of usage of digital learning tools in the corporate L&D industry has not changed in the last 12 months.

A key reason for this is the size of the learning curve that L&D professionals face in order to adopt digital learning mindsets and methodologies. This matter is addressed below in the section on insights from the research.

Table 4: Changes in occurrence of usage of learning technologies: 2018-2019

Malaysia

			Actual 2018 (%)	Prediction for 2019 (%)	Actual 2019 (%)
01	e-Learning	CONSTANT	74	69	78
02	Video libraries	▲ RISE	30	29	36
03	Social-learning	CONSTANT	36	31	33
04	Micro learning	CONSTANT	15	26	15
05	Video simulations	CONSTANT	24	28	25
06	Adaptive learning	CONSTANT	15	27	19
07	Gamification	▼ DECLINE	21	35	13
08	Virtual reality	CONSTANT	8	16	9.3
09	Augmented reality	CONSTANT	5	14	7.4

Table 5: Changes in occurrence of usage of learning technologies: 2018-2019

Singapore

			Actual 2018 (%)	Prediction for 2019 (%)	Actual 2019 (%)
01	e-Learning	CONSTANT	73	58	75.7
02	Video libraries	CONSTANT	29	29	29.7
03	Social-learning	CONSTANT	27	34	24.3
04	Micro learning	CONSTANT	21	29	18.0
05	Video simulations	▼ DECLINE	22	23	12.6
06	Adaptive learning	CONSTANT	16	27	11.7
07	Gamification	▼ DECLINE	22	33	9.0
08	Virtual reality	CONSTANT	7	7	8.1
09	Augmented reality	CONSTANT	5	5	5.4

Change > 5% = **Rise**
Change < 5% = **Decline**

Satisfaction with ROI from digital learning – inconclusive results

We asked respondents to indicate their level of agreement with the statement, "I am satisfied with the ROI that we are getting – in terms of learning outcomes –from our learning programmes that incorporate digital elements."

The results are inconclusive:
- The levels of satisfaction for Malaysia and Singapore are 35% and 30% respectively
- There is a very high percentage of "neutral responses" – 44% for Malaysia and 51% for Singapore
- The levels of dis-satisfaction with ROI is in the order of 20% for each country.

## A key issue is that **L&D has not traditionally measured ROI.**

In most cases, L&D measures Kirkpatrick Level 1 (evaluation of training programme - "happy sheets"), and, to a lesser extent, Level 2 - knowledge of what was covered. Measurement of impact of learning and development on the business is rarely measured in conventional L&D.

This is reflected in the table below which indicates a predominantly "neutral" stance on satisfaction with ROI from learning programmes. There is no data on which to provide a firm conclusion.

The data is therefore not clear because L&D does not have the means to measure ROI.

As seen below, this presents major issues for organisations seeking additional budget to move forward with digital learning.

Figure 4: I am satisfied with the ROI in learning outcomes from our learning programs

N (SG): 92
N (MY): 181
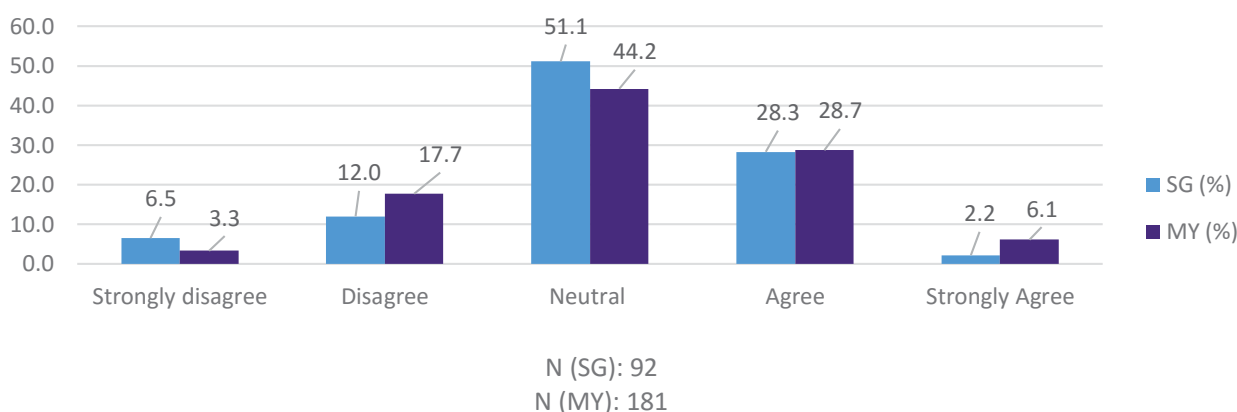
L&D Competence is a key barrier to implementation of digital learning

The research points to L&D competence gaps being a key barrier to the implementation of digital learning.

This section reports the outcomes from two questions:

1. Organisational barriers to the implementation of digital learning.
2. Competence gaps of L&D in the implementation of learning technologies.
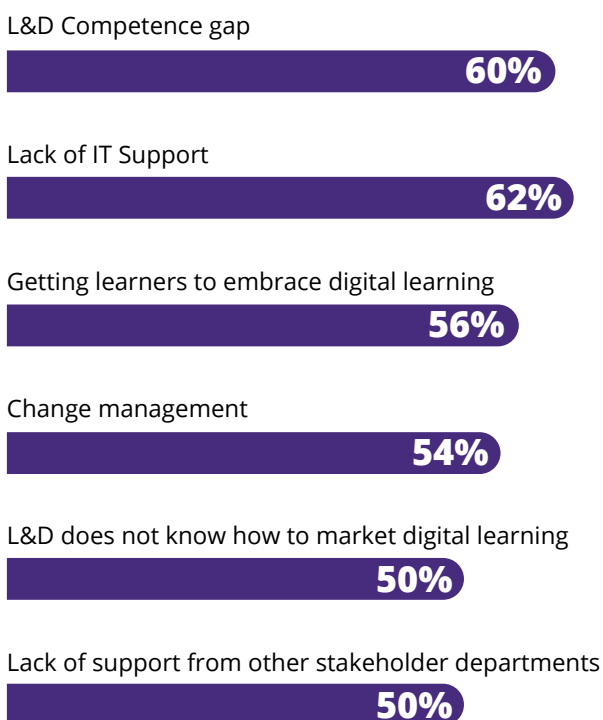
1. Organisational Barriers to the Implementation of Digital Learning

We asked respondents to rate their level of agreement with statements on possible barriers to the implementation of digital learning.
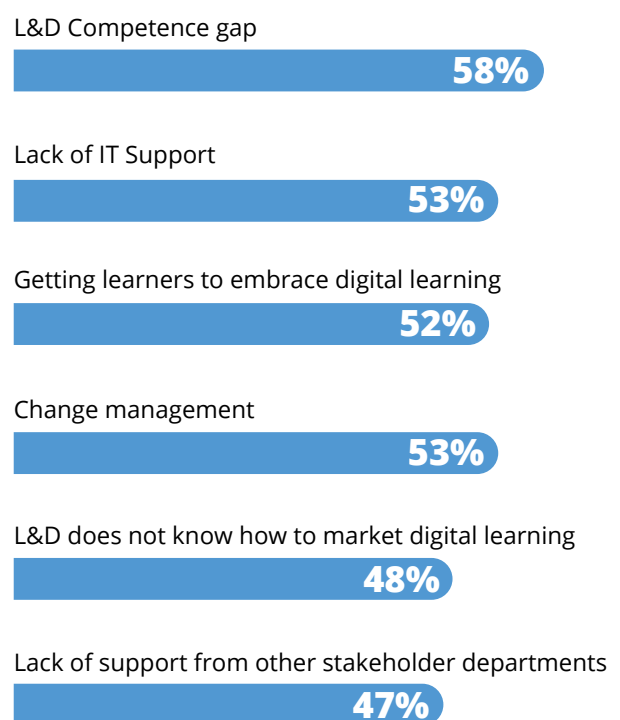
The responses are shown below:

Figure 5: Percentage Agreement on barriers to implementation to digital learning

MALAYSIA

L&D Competence gap
60%

Lack of IT Support
62%

Getting learners to embrace digital learning
56%

Change management
54%

L&D does not know how to market digital learning
50%

Lack of support from other stakeholder departments
50%

SINGAPORE

L&D Competence gap
58%

Lack of IT Support
53%

Getting learners to embrace digital learning
52%

Change management
53%

L&D does not know how to market digital learning
48%

Lack of support from other stakeholder departments
47%

2. Competence gaps of L&D in the implementation of learning technologies

We tested for perceived levels of competence in the implementation of these learning technologies – and found significant competency gaps.

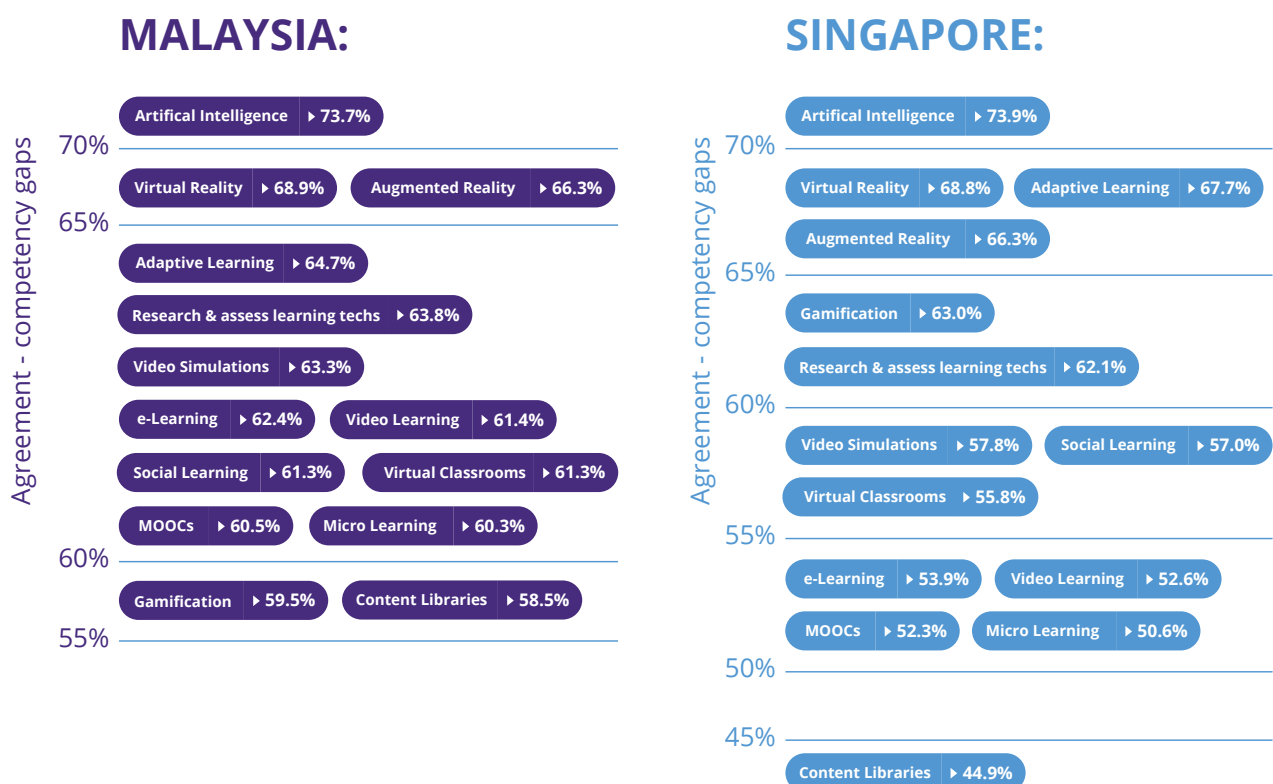The results are similar to those from the 2018 survey.

Competency gaps are the root cause for the minimal progress in the adoption of new learning technologies,

as reported earlier in this report between 2018 and 2019.

As can be seen from the data below, the biggest competency gaps are in technologies that potentially provide significant payoffs in terms of reduction of costs of L&D, e.g. artificial intelligence, adaptive learning, augmented reality and gamification.

It is also notable that there are low levels of competence in a fundamental skill in the area of digital learning - research and assessment of learning technologies.

Figure 6: Level of agreement that there are L&D competency gaps in the implementation of specific learning technologies

MALAYSIA:

Agreement - competency gaps

- Artifical Intelligence ▸ 73.7%
- 70%
- Virtual Reality ▸ 68.9%   Augmented Reality ▸ 66.3%
- 65%
- Adaptive Learning ▸ 64.7%
- Research & assess learning techs ▸ 63.8%
- Video Simulations ▸ 63.3%
- e-Learning ▸ 62.4%   Video Learning ▸ 61.4%
- Social Learning ▸ 61.3%   Virtual Classrooms ▸ 61.3%
- MOOCs ▸ 60.5%   Micro Learning ▸ 60.3%
- 60%
- Gamification ▸ 59.5%   Content Libraries ▸ 58.5%
- 55%

SINGAPORE:

Agreement - competency gaps

- Artifical Intelligence ▸ 73.9%
- 70%
- Virtual Reality ▸ 68.8%   Adaptive Learning ▸ 67.7%
- Augmented Reality ▸ 66.3%
- 65%
- Gamification ▸ 63.0%
- Research & assess learning techs ▸ 62.1%
- 60%
- Video Simulations ▸ 57.8%   Social Learning ▸ 57.0%
- Virtual Classrooms ▸ 55.8%
- 55%
- e-Learning ▸ 53.9%   Video Learning ▸ 52.6%
- MOOCs ▸ 52.3%   Micro Learning ▸ 50.6%
- 50%
- 45%
- Content Libraries ▸ 44.9%

The key to overcoming the barriers: Upgrade the competency of L&D in digital learning

We believe that **L&D competence gaps are the root cause issue impeding the implementation of digital learning** in the workplace.

Once L&D competence gaps are addressed, a competent and confident L&D would:

1 Build greater learning engagement
The data reported in this section indicates that learner buy-in is a key issue in both Malaysia and Singapore.

The traditional model of classroom learning was based on learner compliance, i.e. learners were required to attend the training. In a world of digital learning, learners now have a choice of whether or not to engage in the learning.

In other words, digital learning is competing for attention with the many workplace demands placed on employees at all levels.

To address this issue, it is important that L&D departments develop competencies in
- Marketing - to **attract** the attention of learners to commence engaging in digital learning
- Learning experience design - to have learners **continue to engage** in digital learning.

This issue was also highlighted in the Digital Learning in Asia 2018 report.

2 Understand learning technology
Support from IT is reported by survey respondents to be a barrier to the implementation of digital learning. IT departments have enormous demands on their time and resources. That is, L&D is just one of the many internal clients that IT serves. Being dependent on IT to evaluate and then implement learning technologies would result in lengthy delays.

The 2018 report indicated that a key competency that L&D needs to develop lies in the area of understanding learning technologies. L&D needs to feel comfortable to research, evaluate and implement learning technology. This is an uncomfortable transition for many traditional L&D practitioners.

3 More effectively manage stakeholders
The data indicates that support from stakeholders is a barrier to the implementation of digital learning. As reported in the 2018 survey, L&D departments need to develop change management skills to influence key stakeholders. This skill-set is required as digital learning technologies require changes in thinking and habits, at all levels in the organisation, as to how learning takes place. These changes relate to the transition from L&D as the central organiser of training to the driver of employee self-driven learning.

Budget limitation barriers - an organisation philosophy issue

Budget allocations to digital learning still at low levels

The data indicates that **budget limitations are a barrier to the implementation of digital learning.**

MALAYSIA

66% agree that

budget limitations are a barrier

SINGAPORE

61% agree that

budget limitations are a barrier

The strategic objective for many organisations is for digital learning to reduce training costs and to increase the effectiveness of learning transfer. This requires initial investments above and beyond "normal L&D budget" in people with the "right skills" and technology.

The investments – including evaluation time and cost – in major learning experience technologies can be significant.

Q: "Approximately what percentage of your total L&D budget are you investing in digital learning?"

The percentage of budget devoted to digital learning remains at low levels. This is similar to the results from 2018.

We wanted to understand what percentage of L&D budget is allocated to digital learning. The data below reports the percentage of respondents that indicated that their organisations allocated **30% or less** of their L&D budgets to digital learning.

LESS THAN 30% OF TOTAL L&D BUDGET INVESTED IN DIGITAL LEARNING

86%
MALAYSIA

74%
SINGAPORE

Budget barrier - lack of data on ROI from learning

The challenge is that L&D does not traditionally measure ROI to justify additional investments.

The absence of conventional business cases, based on ROI data, presents a major potential roadblock to the implementation of digital learning in organisations.

For organisations to accelerate forward in digital learning, it will require a philosophical commitment at organisational level.

The Elementrix Digital Learning in Asia 2018 report (page 49) concluded:

In traditional, stable environments, resource allocation decisions are based on conventional evidence-based ROI business cases. In an uncertain environment, a different paradigm of decision-making is required. This paradigm will have to be based on a vision for the future, rather than on conventional backward looking ROI-based justifications which cannot be provided. These businesses will be innovative about what evidence is used to measure success.

This conclusion holds in 2019.

This matter is under ongoing enquiry by Elementrix.

The adoption of learning technologies **requires new decision-making platforms.**

Business cases for investments in digital learning must be underpinned by an organisational view of a **"vision for digital L&D transformation,"** rather than conventional economic business case decision-making processes.

Insights from the research

Going digital is more human than technological

Technology options are expanding rapidly

The universe of technology options available to learning and development is expanding at a rapid rate. Enormous sums of money are being poured into learning technologies to make them more user-centric, more engaging, more accessible, more analytical, more convenient, richer with more content, and lower cost.

We are still at very early stages of the application of learning in technology. L&D practitioners are on a very steep learning curve, continually experimenting and moving forward based on market feedback. They need to think agile.

New skills and mind-sets needed for corporate L&D

Our research from both 2018 and 2019 reinforces that going digital is more about humans than it is about technology. After 2 years of research, it is clear that a lack of L&D competency in a digitally-enabled world is the root cause barrier to the implementation of digital learning in organisations.

In this world where learners can choose to engage with the digital learning, L&D teams must develop new skills and mind-sets to:

① Attract learners to the digital learning

Impact on L&D: Marketing is a new skill that L&D needs to adopt.

In a separate research exercise, Elementrix conducted research among learners who were given the opportunity to learn via a learning experience platform. One of the key reasons for non-participation in this digital learning was that "They did not communicate the benefits to me" or "They only sent one email".

When learning becomes a choice – through digital means – it competes with the many demands on the limited time of employees at all levels. Compelling employees to learn is not effective – learners find ways to get around this.

L&D needs to find ways to create interest, even "buzz", around digital learning. Marketing the benefits of the learning will create awareness and interest to participate. L&D can no longer passively send bland information, assuming people will participate.

21 Keep learners coming back

Once learners are attracted, learning must be designed to keep them coming back to the learning. To achieve this, learning design must be engaging and useful.

Impact on L&D: Human-centred design is a new skill that L&D needs to adopt.

- L&D needs to understand **how to engage** different categories of learners through learning experience design. Engagement strategies include short content, video content, gamification, social learning, adaptive learning and more.

- Second, learning must be **useful to learners** in different roles across the organisation. L&D needs to understand the context of learners, so that it can design relevant learning strategies, learning journeys and learning experiences that are useful to help learners do a better job.

L&D needs to learn human-centred design models of thinking and associated skills to understand learners much more deeply than ever before. Many L&D professionals start at the wrong place when considering digital learning. They ask "What technology should we adopt?" The starting points in the human-centred design process are to ask "What is our purpose", "Who are the people", and "What are their needs, wants and learning styles?"

We believe corporate L&D professionals, need to adopt "The Steven Spielberg mind-set". This famous movie director not only produces engaging movies, he also markets them really well. The result is huge success.

2 Evaluating and implementing learning technologies

L&D needs to develop knowledge and comfort with technology

It is our experience that L&D professionals who are in positions of influence are, on the whole, not naturally comfortable with technology. They use a limited range of technologies for communication. However, they are not curious explorers and users of new technologies. They are not "digital natives".

This is holding up the progress of implementation of digital learning in organisations.

In a digital world, L&D cannot rely on IT departments for ongoing support to research, evaluate and implement learning technologies. Comfort with technology will be a core competency for L&D in 10 years' time. This is not the case at present.

Organisational vision – the digital learning accelerator

Both the 2018 and the 2019 surveys found that budgeting for digital learning technologies and people resources is significantly about organisational vision for L&D. With a vision for an organisation to develop competitive advantage through the speed of learning – enabled by digital means – organisations will accelerate in a digital learning world.

The absence of vision will result in C-Suites seeking ROI-based business cases for increased L&D budgets. This will significantly hinder movement into digital learning, as L&D is not equipped to develop this sort of business case, and does not collect the required information.

The journey ahead: Advancement through successes, failures and discomfort

Based on our observations of the industry, discussions with clients, attendance at conferences and following of industry trends, we believe that the world of digital learning is just at the start of a major transformation.

Traditional classroom learning will always have a place. And, learning will be strengthened through the introduction of digital components.

In the corporate world, success will come from L&D up-skilling. Models and frameworks will emerge for the development of learning strategies and learning experiences in a digitally-enabled world. These models do not exist at present.

In the process, for many successful L&D professionals, there will be an uncomfortable transition as they unlearn thinking and practices that have led to success in the past.

There are few, if any, frameworks for L&D practitioners to work within when designing

learning in a digital environment. As a result, as one leading researcher in digital learning said, "There are a lot of lost souls in the industry".

Within this context, corporate L&D will experience some success, and a significant amount of disappointment, in terms of learner engagement, as it moves up the learning curve to transform corporate learning.

As the saying goes, "Rome was not built in a day". So too, will we find that corporate digital learning will take time to evolve and mature.

Corporate L&D currently makes a difference to people and organisations.

Over time, as it matures in a digitally-enabled world, it will contribute to organisational success at a multiple of what it does today.

The Research Methodology

The Digital Learning in Asia Survey was conducted in Malaysia and Singapore over a period of 4 weeks in September and October 2019.

Questionnaire design

Most of the questionnaire was duplicated from the Digital Learning in Asia 2018 survey in order to create comparisons and benchmark data. A small number of questions were added to the 2019 survey. We added additional learning technology options in the questions on "Current and anticipated usage of learning technologie", to make the list more current.

The questionnaire was developed based on industry and content knowledge of the Elementrix team. Questions were targeted to address key information objectives that had been set for the research. Professor Keith Houghton, Chief Academic Strategist, Research Coaching Australia, provided expert advice. The questionnaire was finalised following a series of discussions with Professor Houghton. Its design was crafted to be easy to complete – within 10 minutes. The questionnaire consisted of closed questions, with "write-in" option in a few questions, and one major open-ended question.

The 2018 questionnaire was pilot tested among respondents that mirrored the target population. As the 2019 questionnaire was substantially the same as 2018, we did not pilot test it.

Questionnaire structure

The questionnaire structure was based on several sections:

• Digital learning solutions in your organisation

• L&D team's readiness to move forward in digital learning

• Budget and return on investment (ROI)

• Barriers to success

• Information on respondents to help analyse the data

Definitions

The survey instructions indicated a definition-clarification that "Digital learning solutions" refers to the use of online technology to enhance learning before, during or after blended learning programmes.

Sample construction

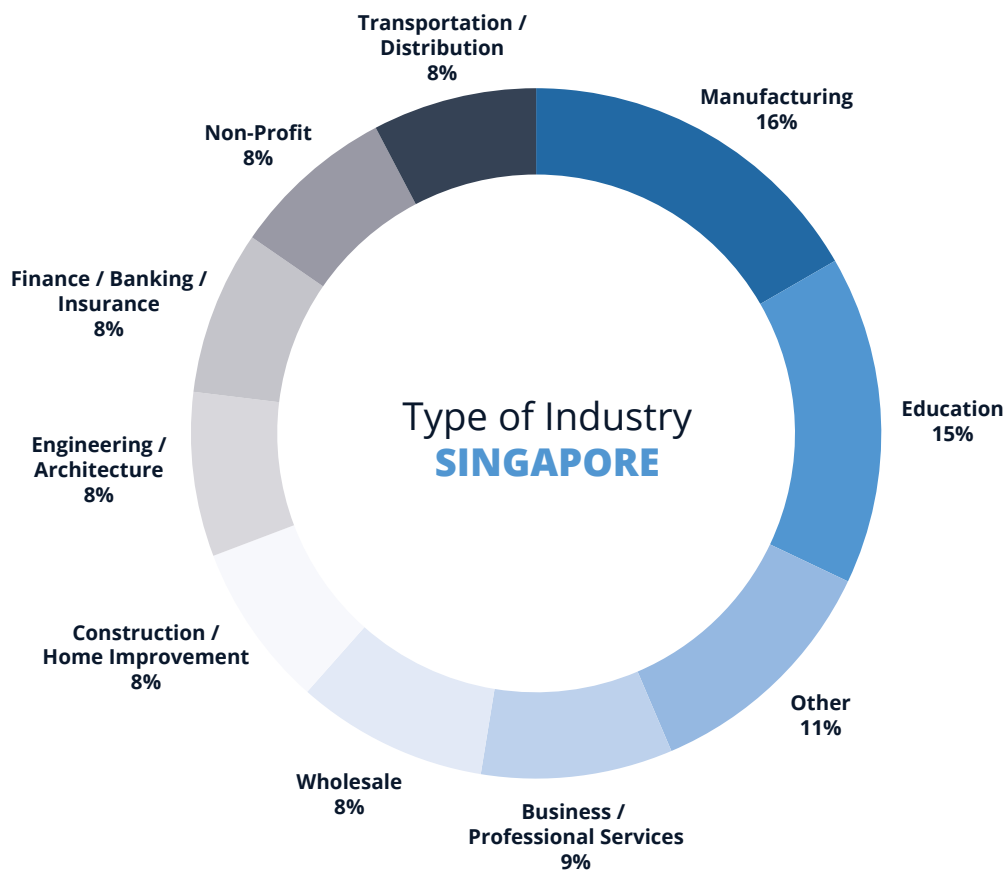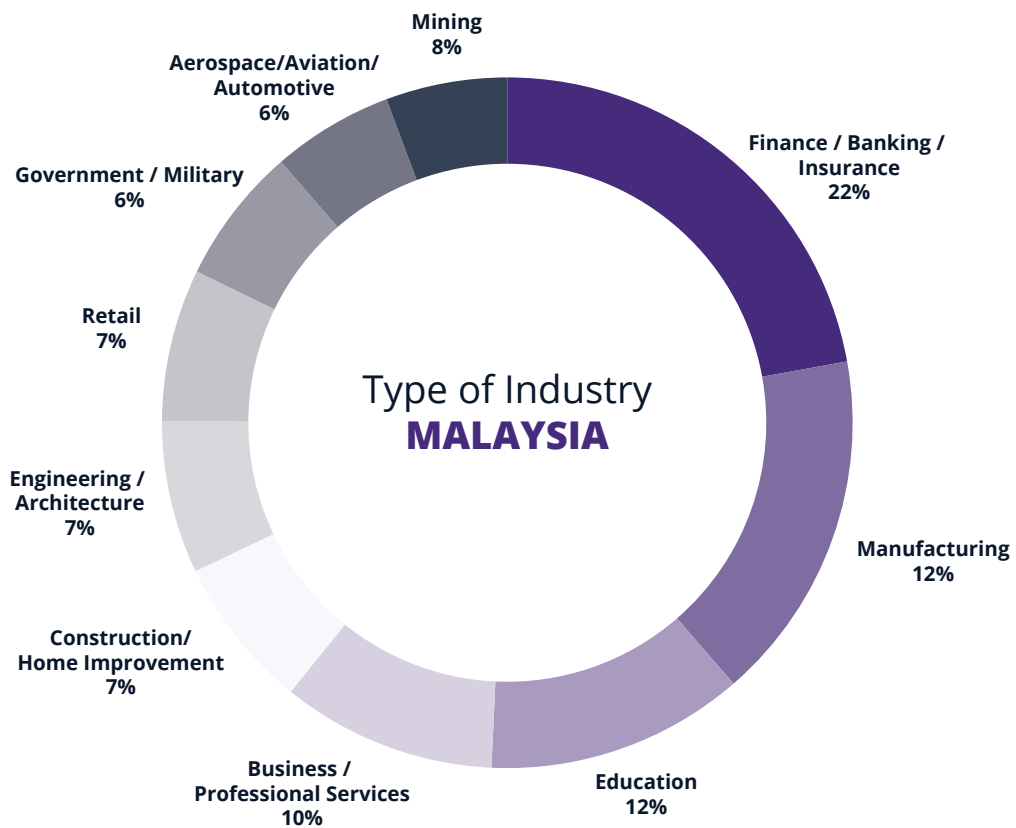Respondents in Singapore were drawn from a relevant sub-set of the Singapore Institute of Management database. Respondents in Malaysia were drawn from the databases of Malaysian Institute of Management, Elementrix and TACK TMI. A total of 111 valid responses were received from Singapore, and 203 in Malaysia. The sampling frame was developed so as to provide a representative sample of the population of interest. Analysis of the respondents in the more recent year revealed a number of responses for micro-organisations outside the population of interest. So as to construct a valid sample that is comparative to the previous year, these were excluded.
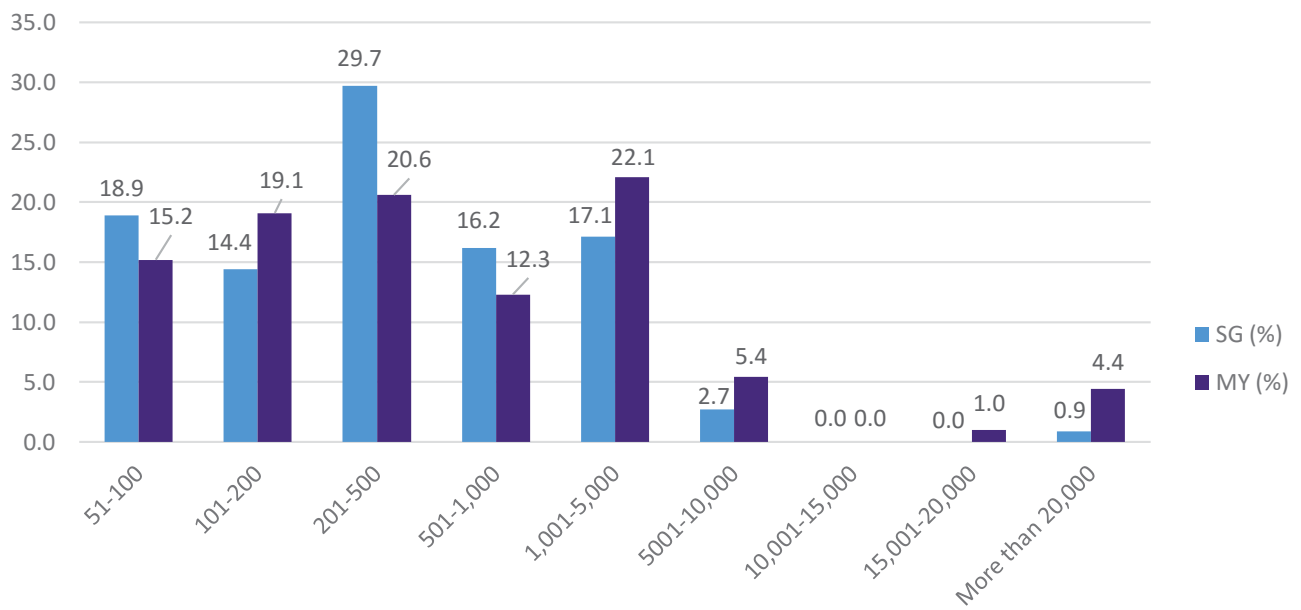
Data capture and analysis

The survey was administered through the SurveyMonkey online survey tool. The data was analysed using appropriate statistical analysis techniques including both descriptive and univariate analysis. Given the nature of the data, multivariate analysis was inappropriate.

Appendix

Respondents' Profile

Type of Industry
MALAYSIA

- Mining 8%
- Aerospace/Aviation/Automotive 6%
- Government / Military 6%
- Retail 7%
- Engineering / Architecture 7%
- Construction/ Home Improvement 7%
- Business / Professional Services 10%
- Finance / Banking / Insurance 22%
- Manufacturing 12%
- Education 12%

Type of Industry
SINGAPORE

- Transportation / Distribution 8%
- Non-Profit 8%
- Finance / Banking / Insurance 8%
- Engineering / Architecture 8%
- Construction / Home Improvement 8%
- Wholesale 8%
- Business / Professional Services 9%
- Manufacturing 16%
- Education 15%
- Other 11%

Organisation Size

Chart: Organisation Size

Organisation Size	SG (%)	MY (%)
51-100	18.9	15.2
101-200	14.4	19.1
201-500	29.7	20.6
501-1,000	16.2	12.3
1,001-5,000	17.1	22.1
5001-10,000	2.7	5.4
10,001-15,000	0.0	0.0
15,001-20,000	0.0	1.0
More than 20,000	0.9	4.4

N (SG): 111
N (MY): 204

Acknowledgements

We would personally like to thank the following people and organisations for playing important roles in the survey and report-writing process. The survey would not have been possible without their involvement.

elementrix

a digital learning partner of

TACK▽
⌒TMI
a **GI GROUP** brand